myProposals (Kuali Coeus)

warehouse data for Web Intelligence reporting and analytics

April 5, 2018 1:45 – 2:45 Room I Research

UNIVERSITY OF ILLINOIS AT CHICAGO

UIC

Lincoln Hall

707South Morgan Street

Conference Sponsors: The Office of the Chancellor, Budget & Financial Administration / Human Resources, the Office of the Provost and Vice Chancellor for Academic Affairs, the Office of the Vice Chancellor for Research, and the Office of Business and Financial Services



Workshop Presenter(s)

- Jerry Myers
 Functional Area Coordinator Finance
 Administrative Information Technology Services
 jdmyers6@uillinois.edu
- Erika Lopez
 Grants and Contracts Associate
 Office of Research Services
 vivian@uic.edu



Please ...

- Turn off cell phones.
- Avoid side conversations.
- Please feel free to ask questions anytime during the presentation.
- Sign the attendance roster.
- Complete the evaluation at the end of the workshop.



Workshop Objectives

- Understand what the myProposal data warehouse information is and is not
- Learn how to access the data
- Discover current reporting options
- Determine the right universe for your needs
- Become aware of future release information

What is myProposals information in the data warehouse and what is it not

- Data in the warehouse is not intended to be a direct replication of the data as it appears in KC but be the result of business rules developed through requirements for specific reporting purposes
- Data is not "live" but reflects the close of the previous business day
- Data is structured for historical reporting by PI and/or department



What is myProposals information in the data warehouse and what is it not

- It is not myResearch Portal
- It is not myResearch Standard Reports
- Both of these run directly off of KC and present "live" information

UNIVERSITY MyResearch Portal

access to administrative data for sponsored research LOG IN Conditions of use SAD Home Documents Organize * Send * More Actions * Details My Documents Title 🔺 Туре Folders Award_Transactions_by_Negotiator Web Intelligence Categories Awards_Special_Review Web Intelligence 🖹 Financial Aid Awards-by-Sponsor_Unit Web Intelligence B HR Salary Planner P Completed_Proposals_By_Coordinato Web Intelligence B HRPay -E-Verify Web Intelligence MAI 🍘 ÷ Executed_Agreements Web Intelligence 😂 Mobile P Foreign_Sponsor Web Intelligence Modification Exception Report Web Intelligence mvPronosals Non-Submitted Negotiations Web Intelligence OBFS Reports Pending_Awards_By_Negotiator Web Intelligence PNP Reports Proposals_by_Sponsor_Unit Web Intelligence PRMS Reports Ģ Proposals Special Review Web Intelligence Proposal P Proposals Under Review Web Intelligence P Subawards with FFATA Web Intelligence Report Conversion Ģ Subawards_by_Sponsor_Unit Web Intelligence Solution Library - Employees Unassociated Proposal Logs Web Intelligence

Solution Library - Mona

Access to myProposals information in the data warehouse is separate

- Access to myProposals data in EDDIE is not included with Finance, myProposals standard reports
- It is not included with other START myResearch applications or My-UI-Financials
- USC instructions for granting access at end of this presentation



Accessing myProposals data

 Data is accessed through EDDIE/Web Intelligence <u>https://eddie.ds.uillinois.edu/</u>

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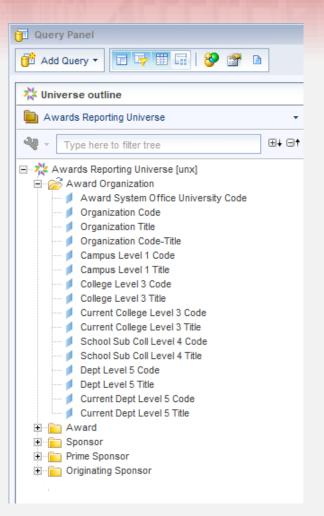
myProposals Universes

- Proposal Reporting Universe
 - Includes funded amounts
- Awards Reporting Universe
 - Most complicated of the three universes
 - Transactional based
 - Includes proposal numbers and grant codes
- Subawards Reporting Universe
 - Transactional based
 - Includes Award and Subaward information



- First folder is Banner
 Organizational Hierarchy
 - First fields are directly from KC
 - Following fields follow Banner structure from Campus, to College, to School, to Department

*Hover over a field for definition



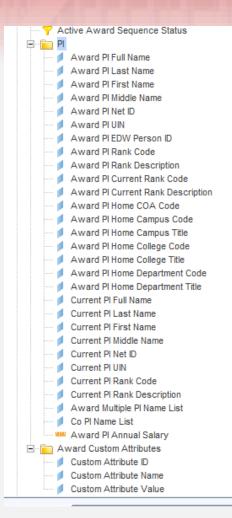


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 - Many dates are available with Fiscal
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 - Amounts as totals, direct and indirect
 - Use Active Award Sequence Status filter when not using Transaction amounts

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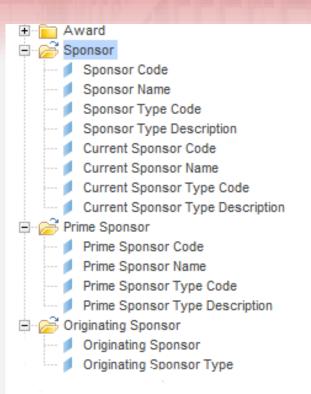


- Second folder continued
 - PI information such as home organization information, rank and lists of other investigators
 - Custom Attributes folder contains such indicators as Rate,
 Comments, and HIPAA. Use with
 Value field. Use in a report will create multiple values.





- Sponsor information
 - Sponsor Name and Type
 - Sponsor and Prime Sponsor are as they appear in myProposals
 - Originating Sponsor is a derived field. Prime Sponsor if listed, else Sponsor

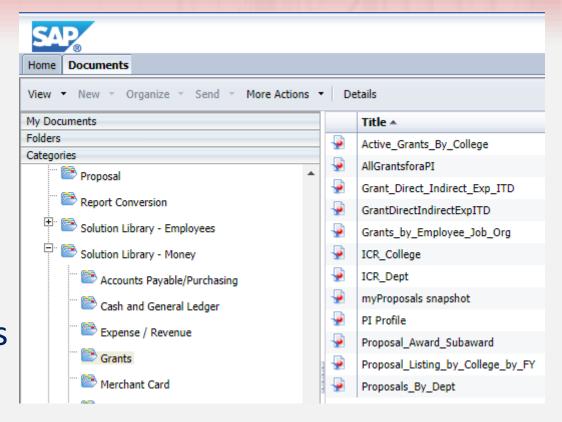




myProposals Reporting Resources

• EDDIE

- myProposals
 snapshot uses
 all three
 universes (not linked)
- PI Profile shows
 link between
 HR data and
 Awards



myProposals Reporting Resources

Edit Data Provider	Refresh	Select Design to edit
		Reading Design ? ? •
Available Objects Type here to filter tree myProposals snapshot myProposals Campus Level 1 Code Campus Level 1 Code Campus Level 3 Code College Level 3 Code Dept Level 5 Code Dept Level 5 Title Organization Code Organization Title		Proposal Proposal Total Proposal Total Indirect Amoun
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Available Objects



myProposals Reporting Resources

- EDDIE reports in development
 - Awards linked to expenditures (Finance access will be necessary) Operating Ledger Reporting universe contains expenditures by grant code
 - Additional information on investigators besides PI, including UIN, NetID, and home organization information.



Questions / Concerns?



Appendix





Resources

Office of the Vice Chancellor for Research http://research.uic.edu/

AITS Decision Support Includes training and help resources <u>https://www.aits.uillinois.edu/services/reports_and_data</u>



Resources

START myResearch https://web.uillinois.edu/start_myresearch/

My-UI-Financials <u>https://myuifinancials.uillinois.edu/myFi/</u>

Office of Business and Financial Services https://www.obfs.uillinois.edu/

USC instructions

Decision Support Security Application

https://appserv7.admin.uillinois.edu/dsuscapp/authentication/login.aspx

UNIVERSITY OF ILLINOIS						
You are currently logged in as jdmyers6	DECISION SUPPORT		Main Menu Lopoul			
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	DS Job Category You can only select one DS Job Category Select Data Subject Area Hold down the CTRL ser to select mul Data Subject Areas Captal Programs Course (Instructor Course (Instructor Data Analyst (Full) Data Analyst (Restricted) Image Programs STU Catalog and Schedule STU Financial Aid Census Data Analyst (Restricted) STU Financial Aid Census "Decision Support Security will verify USC authorcation: over selected role before access is granted. Intended Use of Data (Describe)	pie Role Guide	DS Job Categories with myPropose Data Subject Areas: CITES ACCC Data Analyst (Full) Data Analyst (Limited) Data Analyst (Restricted) Enterprise Auditor Executive Officer Finance Manager Financial Aid Manager			
	Has user signed UI Information Security Compliance Form? * No Yes <u>See Information Security Com</u>	plance Former	Institutional Researcher OBFS – Grants OBFS – Staff			
	Has user received FERPA training? # No O Yes See FERP	A. Information as	Personnel Manager			