

2018 BRINGING ADMINISTRATORS TOGETHER CONFERENCE

# myProposals (Kuali Coeus)

warehouse data for Web Intelligence reporting and analytics

April 5, 2018

1:45 – 2:45 Room I Research

**UIC** UNIVERSITY OF ILLINOIS  
AT CHICAGO

UIC

Lincoln Hall

707 South 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**  
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- **Erika Lopez**  
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# 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

The screenshot displays the myResearch Portal interface. At the top, it says "UNIVERSITY OF ILLINOIS myResearch Portal" and "access to administrative data for sponsored research". There is a "LOG IN" button and a link to "Conditions of use". Below this is a SAP interface showing a list of documents. The "myProposals" category is highlighted in the left sidebar.

Categories	Title	Type
Financial Aid	Award_Transactions_by_Negotiator	Web Intelligence
HR Salary Planner	Awards_Special_Review	Web Intelligence
HRPay	Awards-by-Sponsor_Unit	Web Intelligence
IAM	Completed_Proposals_By_Coordinator	Web Intelligence
Mobile	E-Verify	Web Intelligence
myProposals	Executed_Agreements	Web Intelligence
OBFS Reports	Foreign_Sponsor	Web Intelligence
PNP Reports	Modification Exception Report	Web Intelligence
PRMS Reports	Non-Submitted Negotiations	Web Intelligence
Proposal	Pending_Awards_By_Negotiator	Web Intelligence
Report Conversion	Proposals_by_Sponsor_Unit	Web Intelligence
Solution Library - Employees	Proposals_Special_Review	Web Intelligence
Solution Library - Money	Proposals_Under_Review	Web Intelligence
	Subawards with FFATA	Web Intelligence
	Subawards_by_Sponsor_Unit	Web Intelligence
	Unassociated Proposal Logs	Web Intelligence



# 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 <https://eddie.ds.uillinois.edu/>

The screenshot shows the SAP user interface for Jerry D. Myers. The top navigation bar includes the SAP logo, a welcome message, and menu items for 'Applications', 'Preferences' (circled in red), and 'Help menu'. Below this is a 'Log off' button. The main content area is divided into three sections: 'My Recently Viewed Documents' (listing items like 'PI Profile' and 'UR\_FIGR\_GRANT\_DET...'), '0 unread messages in My ...' (with a 'See more...' link), and 'My Applications' (showing several application icons, with the bottom-most icon circled in red).



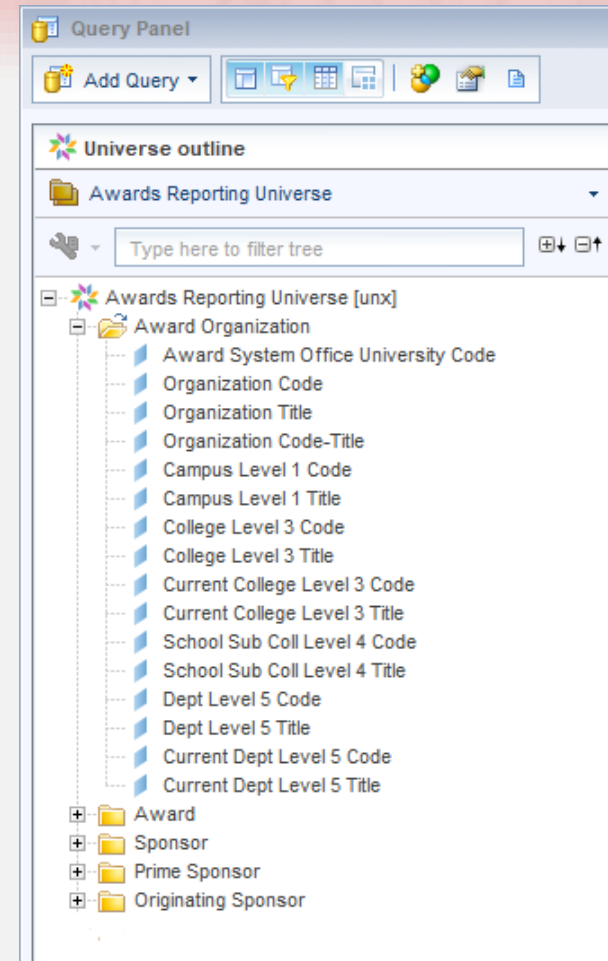
# myProposals Universes

- **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

# myProposals Universes Layouts

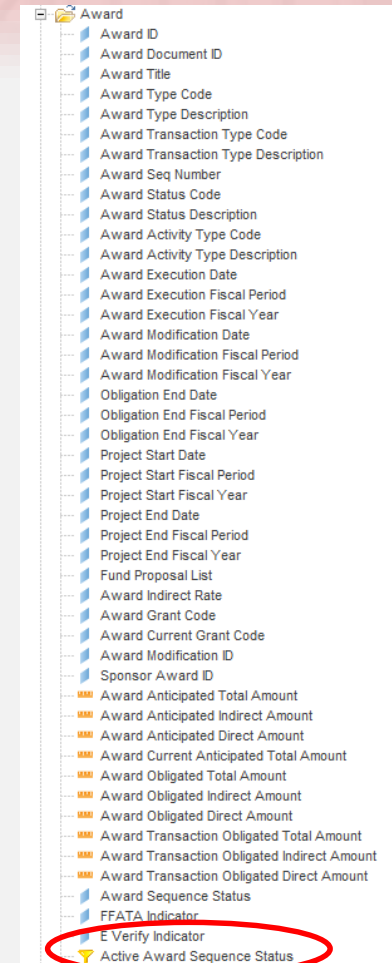
- First folder is Banner Organizational Hierarchy
  - First fields are directly from KC
  - Following fields follow Banner structure from Campus, to College, to School, to Department

\*Hover over a field for definition



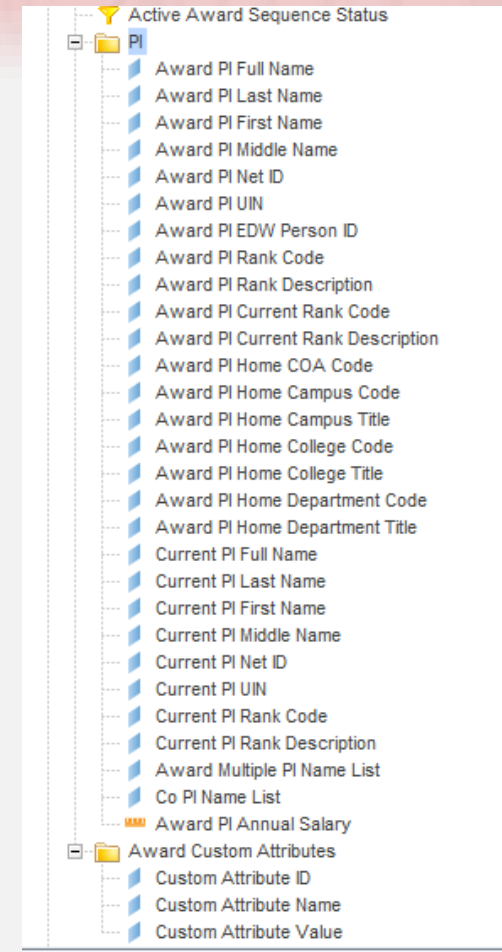
# myProposals Universes Layouts

- Second folder contains the most information
  - Award ID, Title and Type
  - Many dates are available with Fiscal Year and Fiscal Period breakouts
  - Amounts as totals, direct and indirect
  - Use Active Award Sequence Status filter when not using Transaction amounts



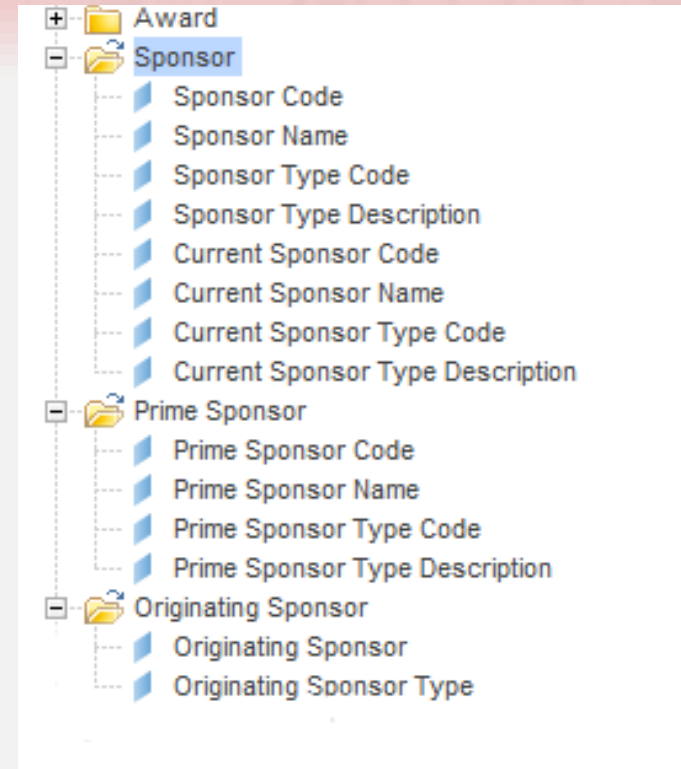
# myProposals Universes Layouts

- 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.



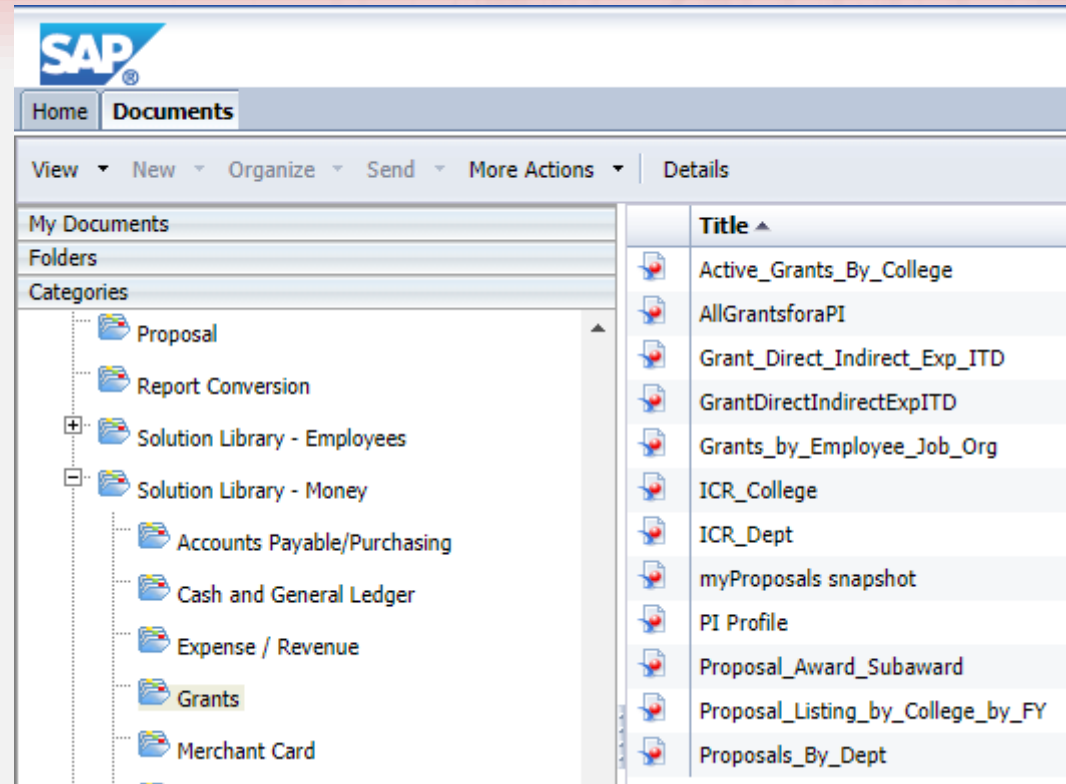
# myProposals Universes Layouts

- 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

The screenshot shows the SAP myProposals snapshot interface. The top navigation bar includes 'Home', 'Documents', and 'myProposals snapshot'. The main menu has 'File', 'Properties', 'Report Elements', 'Formatting', 'Data Access', 'Analysis', and 'Page Setup'. The 'Available Objects' pane on the left lists various data objects under 'myProposals snapshot' and 'Proposals'. The main content area displays three tables: 'Pending Proposals', 'Active Awards', and 'Active Subawards'. Red arrows point to specific UI elements: 'Edit Data Provider' and 'Refresh' icons in the Available Objects pane, the 'Design' dropdown menu in the top right, and the 'Available Objects' pane title.

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

[https://www.aits.uillinois.edu/services/reports\\_and\\_data](https://www.aits.uillinois.edu/services/reports_and_data)

# Resources

## START myResearch

[https://web.uillinois.edu/start\\_myresearch/](https://web.uillinois.edu/start_myresearch/)

## My-UI-Financials

<https://myuifinancials.uillinois.edu/myFi/>

## 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>

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You are currently logged in as jdmyers6 **DECISION SUPPORT** Main Menu | Logout

### Data Desired

**DS Job Category**  
You can only select one DS Job Category

- Capital Programs
- Course Instructor
- Course/Timetable Manager
- Data Analyst (Full)
- Data Analyst (Limited)
- Data Analyst (Restricted)

**Select Data Subject Area**  
Hold down the CTRL key to select multiple Data Subject Areas

- Help Desk
- HR - Pay
- myProposals
- STU Catalog and Schedule
- STU Financial Aid
- STU Financial Aid Census

[User Role Guide](#)

\*Decision Support Security will verify USC authorization over selected role before access is granted.

**Intended Use of Data (Describe)**

Has user signed UI Information Security Compliance Form?

No  Yes [See Information Security Compliance Form >>](#)

Has user received FERPA training?

No  Yes [See FERPA Information >>](#)

DS Job Categories with myProposals  
Data Subject Areas:

- CITES ACCE
- Data Analyst (Full)
- Data Analyst (Limited)
- Data Analyst (Restricted)
- Enterprise Auditor
- Executive Officer
- Finance Manager
- Financial Aid Manager
- Institutional Researcher
- OBFS – Grants
- OBFS – Staff
- Personnel Manager