myProposals (Kuali Coeus)  
warehouse data for Web Intelligence reporting and analytics  

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

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)

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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
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/](https://eddie.ds.uillinois.edu/)
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

Available Objects

Select Design to edit
Edit Data Provider
Refresh
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
Resources

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

DS Job Categories with myProposals
Data Subject Areas:

- CITES ACCC
- 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