

## e-Data REPORTING

In 2007 a data warehouse project began at ISU. By 2009 the first reporting started coming out of the warehouse and was dubbed e-Data. Student and Employee reporting came next and finally Sponsored Programs and Financial reporting was completed in July of 2013.

### e-Data Reporting Portals

**Notes**

**October 9, 2016:** e-Data now contains final September ending cash balance and October beginning balance forward.

**October 4, 2016:** Mac users who have installed the latest version of Safari (Safari 10, released Sept 21, 2016) are not able to navigate throughout e-Data.

The software vendor for this product has been contacted, but until a resolution can be determined, individuals should use Firefox for e-Data access.

Contact [e-datahelp@iastate.edu](mailto:e-datahelp@iastate.edu) with any questions about this.

**Student**

Legacy Reports
Self Service Reports

**Employee**

Legacy Reports
Self Service Reports

**Sponsored Programs**

**Resource Management Model**

**Financial**

Financial
Finance Lite

**Courses and Instruction**

**Departmental Profile**

**Custom Reports**

**e-Data Confidentiality Statement**

e-Data users have access to confidential, sensitive, and/or private information. Prior to accessing e-Data information all e-Data users must read and accept the following:

To get to the e-Data reports, simply click on the picture.

IOWA STATE UNIVERSITY

**Student Portal** Census Day Counts

*Note: Counts exclude Post Docs who are not enrolled*

Year:

Term:

College:

Department:

**Enrollment**

Fall 2016

[Enrollment Reports >>](#)  
[Enrollment Graphs >>](#)

**Residency Maps**

Fall 2016

[Residency Reports >>](#)

**Degrees Awarded**

Academic Year 2016-2017

[Degree Reports >>](#)

**Trends**

Fall 2010 to Fall 2016

[Trend Reports >>](#)  
[Trend Graphs >>](#)  
[Retention and Grad Trends >>](#)

**Retention and Graduation**

Cohort Year 2015

[Retention Reports >>](#)  
[Graduation Reports >>](#)

## The Portals

	<p>The Student portal includes counts for enrollment, residency, degrees awarded, trends over time, retention and graduation.</p>
	<p>The Employee portal includes counts by the organizational structure, by employee type such as faculty, P&amp;S staff and Merit and by FTE.</p>
	<p>The Sponsored Programs portal reports information about all of the awards and proposals that occur at ISU. Counts revolve around sponsors and sponsor types, register dates and the administrative units.</p>
	<p>The RMM portal provides data based on tuition distribution. It includes utility usage and building square footage.</p>
	<p>The financial portal includes all of general ledger data that originates in our financial accounting system called KFS.</p>
	<p>The Courses and Instruction portal provides student credit hours grouped by instructional data including instructor type and tenure. Another set of reports will be coming soon that show student credit hours grouped by courses rather the by instruction type.</p>
	<p>The Department Profile portal is used by department staff to obtain a cross section of data from all of the other portals and is mainly used for departmental reviews.</p>
	<p>And finally, custom reports where anyone can request a custom report for data that's not easily distributed by the portals.</p>

## Financial System

Our financial system is maintained in a system called KFS. Every night the data is gathered from KFS and inserted into the data warehouse. Dozens of reports are available in e-Data surrounding this financial information.



This can be overwhelming for people new to e-Data. Because of that, we gathered a set of the most used reports and put them in a portal called Finance Lite. This is a great place to start when you need financial information.



## Finance Lite

This portal includes 18 financial reports that can be found elsewhere in e-Data, but have been placed here for easy access. By simply choosing the report you want and filling in the filters, you can get the information you need easily and quickly.

### IOWA STATE UNIVERSITY e-Data: Finance Lite

<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Rpt#</th> <th style="text-align: left;">Report Name</th> <th style="text-align: left;">Filters</th> </tr> </thead> <tbody> <tr><td><input type="radio"/></td><td>1. Account Fiscal Year Summary.....</td><td>(1,3,5)</td></tr> <tr><td><input type="radio"/></td><td>2. Account Fiscal Year Object Summary.....</td><td>(1,3,4,5)</td></tr> <tr><td><input type="radio"/></td><td>3. Account Transaction Detail.....</td><td>(1,3,4)</td></tr> <tr><td><input type="radio"/></td><td>4. Account Encumbrance Detail.....</td><td>(1,3,4)</td></tr> <tr><td><input type="radio"/></td><td>5. Account: All Sub-Accts Summary.....</td><td>(1,3,4)</td></tr> <tr><td><input type="radio"/></td><td>6. Account: All Sub-Accts Object Summary.....</td><td>(1,3,4)</td></tr> <tr><td><input type="radio"/></td><td>7. Sub-Acct Fiscal Year Summary.....</td><td>(1,2,3,5)</td></tr> <tr><td><input type="radio"/></td><td>8. Sub-Acct Fiscal Object Summary.....</td><td>(1,2,3,4,5)</td></tr> <tr><td><input type="radio"/></td><td>9. Sub-Acct Transaction Detail.....</td><td>(1,2,3,4)</td></tr> <tr><td><input type="radio"/></td><td>10. Sub-Acct Encumbrance Detail.....</td><td>(1,2,3,4)</td></tr> <tr><td><input type="radio"/></td><td>11. Sub-Acct Miscodes.....</td><td>(1,3,4)</td></tr> <tr><td><input type="radio"/></td><td>12. Account Manager Summary.....</td><td>(3,4,6)</td></tr> <tr><td><input type="radio"/></td><td>13. Investigator Summary(SP only).....</td><td>(3,4,7)</td></tr> <tr><td><input type="radio"/></td><td>14. SPA Financial (Budget vs. Actual).....</td><td>(1,3,4)</td></tr> <tr><td><input type="radio"/></td><td>15. SPA Fiscal Year Monthly Expense Summary..</td><td>(1,3)</td></tr> <tr><td><input type="radio"/></td><td>16. SPA Incept-to-Date Expense Summary.....</td><td>(1,3)</td></tr> <tr><td><input type="radio"/></td><td>17. SPA Sub-Acct Summary.....</td><td>(1,3,4)</td></tr> <tr><td><input type="radio"/></td><td>18. Faculty Startup Summary.....</td><td>(6)</td></tr> </tbody> </table>	Rpt#	Report Name	Filters	<input type="radio"/>	1. Account Fiscal Year Summary.....	(1,3,5)	<input type="radio"/>	2. Account Fiscal Year Object Summary.....	(1,3,4,5)	<input type="radio"/>	3. Account Transaction Detail.....	(1,3,4)	<input type="radio"/>	4. Account Encumbrance Detail.....	(1,3,4)	<input type="radio"/>	5. Account: All Sub-Accts Summary.....	(1,3,4)	<input type="radio"/>	6. Account: All Sub-Accts Object Summary.....	(1,3,4)	<input type="radio"/>	7. Sub-Acct Fiscal Year Summary.....	(1,2,3,5)	<input type="radio"/>	8. Sub-Acct Fiscal Object Summary.....	(1,2,3,4,5)	<input type="radio"/>	9. Sub-Acct Transaction Detail.....	(1,2,3,4)	<input type="radio"/>	10. Sub-Acct Encumbrance Detail.....	(1,2,3,4)	<input type="radio"/>	11. Sub-Acct Miscodes.....	(1,3,4)	<input type="radio"/>	12. Account Manager Summary.....	(3,4,6)	<input type="radio"/>	13. Investigator Summary(SP only).....	(3,4,7)	<input type="radio"/>	14. SPA Financial (Budget vs. Actual).....	(1,3,4)	<input type="radio"/>	15. SPA Fiscal Year Monthly Expense Summary..	(1,3)	<input type="radio"/>	16. SPA Incept-to-Date Expense Summary.....	(1,3)	<input type="radio"/>	17. SPA Sub-Acct Summary.....	(1,3,4)	<input type="radio"/>	18. Faculty Startup Summary.....	(6)	<p>Account (1) <input style="width: 100%;" type="text"/></p> <p>Sub-Acct (2) <input style="width: 100%;" type="text"/></p> <p>(* for Null Sub Acct)</p>	<p>Fiscal Year (3) <input style="width: 100%;" type="text" value="2017"/></p> <p>Month (4) <input style="width: 100%;" type="text" value="Oct"/></p> <p>Period View (5) <input style="width: 100%;" type="text" value="Mo Periodic"/></p>	<p>Account Manager (6) <input style="width: 100%;" type="text"/></p> <p>Investigator - PI/COI (7) <input style="width: 100%;" type="text"/></p>	<p><a href="#">Custom Reports Help</a></p>
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Choose filters, select the report you want to see and click Run.

### IOWA STATE UNIVERSITY e-Data: Finance Lite

1. Account Fiscal Year Summary

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[Summary Download](#)

	JULY 2016	AUG. 2016	SEPT. 2016	OCT. 2016	NOV. 2016	DEC. 2016	JAN. 2017	FEB. 2017	MAR. 2017	APR. 2017	MAY 2017	JUNE 2017
<b>Balance Forward</b>	0.00	252,905.00	303,835.00	218,641.70	275,735.20	275,735.20	275,735.20	275,735.20	275,735.20	275,735.20	275,735.20	275,735.20
Receipts	35,845.00	55,260.00	119,981.70	64,383.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Transfers In	334,115.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Revenue Total</b>	369,960.00	55,260.00	119,981.70	64,383.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Expenditures	117,055.00	4,330.00	205,175.00	7,290.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Transfers Out	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Expenses Total</b>	117,055.00	4,330.00	205,175.00	7,290.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Cash Balance</b>	252,905.00	303,835.00	218,641.70	275,735.20	275,735.20	275,735.20	275,735.20	275,735.20	275,735.20	275,735.20	275,735.20	275,735.20
Encumbrance	100,000.00	100,000.00	100,000.00	100,000.00	100,000.00	100,000.00	100,000.00	100,000.00	100,000.00	100,000.00	100,000.00	100,000.00
<b>Free Balance</b>	152,905.00	203,835.00	118,641.70	175,735.20	175,735.20	175,735.20	175,735.20	175,735.20	175,735.20	175,735.20	175,735.20	175,735.20
Pre-Encumbrance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Uncommitted Balance</b>	152,905.00	203,835.00	118,641.70	175,735.20	175,735.20	175,735.20	175,735.20	175,735.20	175,735.20	175,735.20	175,735.20	175,735.20

That's a quick introduction to e-Data. Please feel free to contact Alicia Duncan [aduncan@iastate.edu](mailto:aduncan@iastate.edu) or Mike Ulm [mlulm@iastate.edu](mailto:mlulm@iastate.edu) with any questions.