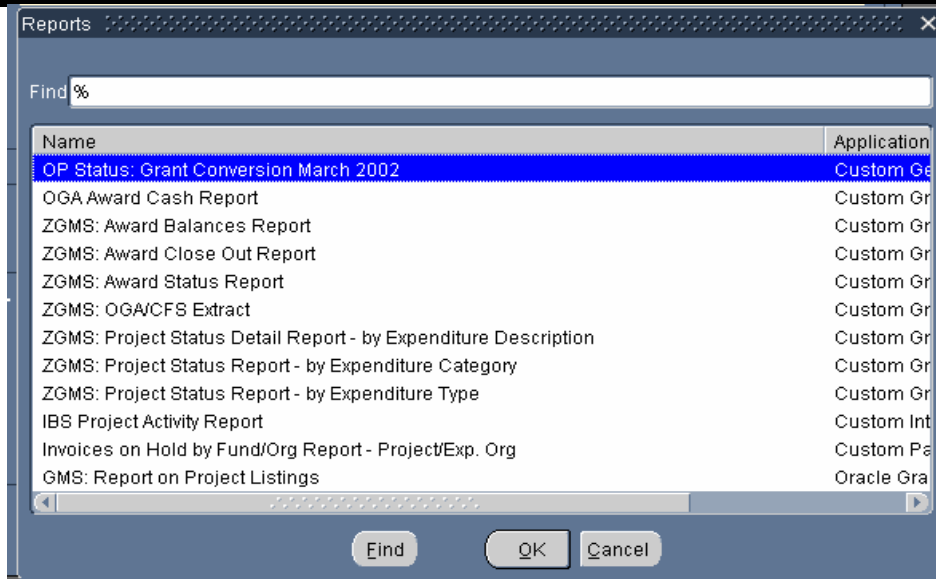


OGA Inquiry Reports: OGA Inquiry OHSU -> Reports -> Requests -> Run



REPORT NAME	DESCRIPTION	Parameters	Fields on Report
ZGMS: Award Status Report	This report provides information on the financial status of the award (lifetime of the award). Depending on the award, it may or may not be funding multiple projects. There are two types of award status reports: 1) By Expenditure Category & 2) By Expenditure Type. Select the Category parameter to produce a summary level report, run the expenditure type to show award expenditure types.	Award Range, Period through, Period Only?, Summary Level	Expenditure Category, Prior Months Actual Exp, DEC-02, JAN-03, FEB-03, MAR-03, Award To Date Actual Expenses, Budget, Encumbrances, Funds Available, % Funds Remaining
ZGMS: Project Status Report – by Expenditure Type	This report lists project expenditure types, but does not provide as much detail as the “ZGMS: Project Status Detail Report – by Expenditure Description” report.**	Project Range, PI Name, Project Status, Org Range, Date	Expenditure Category, Prior Months Actual Exp., 3 Mo. History, Project to Date Actual Expenses, Project Budget, Encumbrances, Funds Available, Percent Funds Remaining
ZGMS: Project Status Report – by Expenditure Category	This is a summary level report for the project.	Project Range, PI Name, Project Status, Org Range, Date	Expenditure Category, Prior Months Actual Exp., 3 Mo. History, Project to Date Actual Expenses, Project Budget, Encumbrances, Funds Available, Percent Funds Remaining
ZGMS: Project Status Detail Report – by Expenditure Description	This is the most detailed report available in OGA. You will want to run this report for your detailed payroll information. This report only shows actual expenditure items and encumbrances (commitments) and it does not list prior months’ expenditures or budget information. The actual expenditure items are period-to-date (month) and the encumbrances are project-to-date.	Project Number, Date	Project Number, Project Name, Project Desc, Exp Cat/type/description, Actual (for period), Encumbrances

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REPORT NAME	DESCRIPTION	Parameters	Fields on Report
ZGMS: Award Close Out Report	High Level snapshot from award level, includes project, installment, encumbrance, and other information about an award	Award Number	Award #, Award Short Name, Award Per, Award Close Date, Funding Source Name and Awd#, Installments, Direct Costs, Indirect Costs, Total Costs, Project #'s, Funded Amt, Expenditures, Revenue, Invoice, Commitments (Encumbrances), Total invoiced, received
ZGMS: PI Report	Monthly high-level summary of project status, including period budget, period expenses (current month and period to date), project personnel and projected expenses. Prints via Adobe .PDF file or exports to Excel.	Project Number, Org range, PI, period.	
ZGMS: Monthly Status by Project, with Projections	Same report as the PI report, in text format.		
IBS Project Activity Report	This report provides information on expenses that were posted on grant accounts through OHSU's Internal Billing System (IBS). You can run this report by Project Number/Service Center or by Service Center/Transaction Number.	Expenditure Item Date Range, Project Number Range, Sort	Service center, Org#, Amout, Transaction number
REPORT NAME	DESCRIPTION	Parameters	Fields on Report
Invoices on Hold by Fund/Org Report – Project/Exp. Org	This report provides a listing of AP (Accounts Payable) invoices on hold. This report can be run by project number and/or by expenditure organization.	Hold Name, Supplier Name, Order by, on hold by per, date range, due/disc date, project range, org range	Hold Type, Hold Code, Post Description, Batch Name, Supplier Name, Invoice Number, PO Number, Invoice Date, Invoice Due Date, Description
OGA Award Cash Report	Shows award cash receipt information.	Period Start, Period End, Award Range, Award Org	Award Org, Principal Investigator, Award #, Customer Name, Customer Number, Invoice #, Invoice Amt, Balance, Receipt Number, Receipt Applied Amount, Reference, Comments
GMS: Report on Project Listings	Project listing report that includes status and start/end dates	Org Name, Project Number, Project Name, Project Type, Project Manager, Project Status, Start Date, End Date	Project Number, Project Name, Project Type, Organization, Project Manager (PI), Start Date, End Date, Total Budget, Project Status
OP Status: Grant Conversion March 2002	Use this report only for reconciling grant accounts for March 2002.	(S)ummary/(D)etail, GL Fund Range, Period Name, Report Group, Budget	Object Code, Obj Code Desc, Prior Actual, 4 month actual columns, Project to date Exp, Project Budget, Funds Available, % Funds remaining
Datawarehouse (dssprd) queries useful for grants			
HR/Payroll Datawarehouse			
APDW Payables Report - POETA	Look up invoices by project and date ranges	Project Range, Date Range	

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REPORT NAME	DESCRIPTION	Parameters	Fields on Report
HRDW Detail Payroll Expenditure Report - POETA	Payroll Transaction Detail by Project	GL Period Range, Project Range	
HRDW Employee Job Information	Detailed labor schedule information by employee. Useful for identifying employees paid from projects that are ending so funding changes can be sent to payroll	Name, Employee Number, Job Dept Number	
HRDW Employee Labor Schedule	Shows current and historical labor schedule information. **Please note that this is not the actual pay history, but information on how the person was setup to be paid at that time**	Employee Number, Employee Name, HR Org Number, Date from and to.	
HRDW Payroll Suspense by Dept Org	Report for identifying employees funded by labor schedules that have expired, and that are being chaged to payroll suspense.	Org #	
HRDW Monthly Payroll Expenditure Report - POETA	Payroll Transaction Detail by Project, by month	GL Period Range, Project Range	
HRDW Emp Labor Dist Summary Reports - POETA (By GL Per or Worked Date)	Labor Distribution Details	GL Period Range, Project Range, Emp #	
OGA Datawarehouse			
Project Summary			
Project Report-By Category	Report with page item list for projects, showing project totals by expenditure category. Includes % budget remaining for the project	Queries show projects where user has a role.	Actual cost, budget, revenue, encumbrances, available budget
Project Title Report-By Category	Report with page item list for project title, showing project totals by expenditure category. Includes % budget remaining for the project		Actual cost, budget, revenue, encumbrances, available budget
PI Status Report-By Project, Category	Report with page item list for PI, showing the PI's projects broken out by expenditure category		Actual cost, budget, revenue, encumbrances
PI Status Report-By Project Title, Category	Report with page item list for PI, showing the PI's projects by project title, broken out by expenditure category		Actual cost, budget, revenue, encumbrances
PI Status Report by Project	Report with page item list for PI, showing the PI's projects		Actual cost, budget, revenue, encumbrances
PI Status Report by Project Title	Report with page item list for PI, showing the PI's projects, by title		Actual cost, budget, revenue, encumbrances
PI Project Status Report-By Category	Report with page item list for PI and Project, showing the project broken out by expenditure category		Actual cost, budget, revenue, encumbrances
Org Status Report-By Project, Category	Report with page item list for Org, showing the Org's projects broken out by expenditure category		Actual cost, budget, revenue, encumbrances
Org Status Report by Project	Report with page item list for Org, showing the Org's projects		Actual cost, budget, revenue, encumbrances
Org Status Report by PI, Project	Report with page item list for Org, showing the Org's PI's and their projects		Actual cost, budget, revenue, encumbrances

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REPORT NAME	DESCRIPTION	Parameters	Fields on Report
Org Status Report by PI	Report with page item list for Org, showing the Org's PI's		Actual cost, budget, revenue, encumbrances
Sch Status Report by Org	Report with page item list for school prefix, listing project owning org totals		Actual cost, budget, revenue, encumbrances
Sch Status Report by Org, Project	Report with page item list for school prefix, listing orgs and their projects		Actual cost, budget, revenue, encumbrances
Sch Status Report by Org, PI	Report with page item list for school prefix, listing orgs and their PI's		Actual cost, budget, revenue, encumbrances
Project Listing	Listing of projects		Project Number, Project Name, Award Number, Actual Cost SUM, Budget SUM, Revenue SUM, Encumbrances Amount SUM, Available Budget Sum, Project Manager, Project Start Date, Project Complete Date, Closed Date, Project Status, Project Title, Project Type, Project Organization Number, Project Organization Name, Mission Number, Mission, Funding Source Name, Award Full Name, Cfda Number, Funding Source Award Number, Hard Limit Flag, Type
PI Project Listing	Listing of projects with page item list for PI		
Org Project Listing	Listing of projects with page item list for Org		
School Project Listing	Listing of projects with page item list for School prefix		
Expenditures			
Project Expenditures by Category	Project expenditures report, with Project page item list broken out by expenditure category and period	Beg and end dates, other parameters available using "edit sheet, conditions" and be activated by checking the boxes.	Burdened cost
Project Expenditures by Type	Project expenditures report, with Project page item list broken out by expenditure type and period		Burdened cost
Project Expenditures	Listing of expenditures by project		
Project Commitment records	Shows current commitments on a project. Not historical-only current commitments		

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REPORT NAME	DESCRIPTION	Parameters	Fields on Report
PI Expenditures by Proj Name, Category	Page item list for PI, listing project expenditures by expenditure category	Beg and end dates, other parameters available using "edit sheet, conditions" and be activated by checking the boxes.	Award Number, Project Number, Project Organization Number, Project Organization Name, Expenditure Type, Expenditure Item Date, Burdened Cost, Pa Period Name, Pa Date, Gl Date, Transferred Date, Transaction Source, Expenditure Comment
PI Expenditures by Proj Name, Type	Page item list for PI, listing project expenditures by expenditure type		
PI Expenditures	Listing of expended by PI and period		
Org Expenditures by Project, Category	Report with page item list for Org, showing the Org's projects broken out by expenditure category		
Org Expenditures by Project, Type	Report with page item list for Org, showing the Org's projects broken out by expenditure type		
Org Expenditures	Report with page item list for Org, showing the Org's expenditures		
School Expenditures by Org, Project	School page item list, with expenditures by Org		
School Expenditures by Org, PI	Report with page item list for school prefix, listing expenditures by org and their PI		
IBS Expenditures			
IBS Expenditures	Report of IBS expenditures on grant accounts, by project and service center.	Beginning and ending dates, project number	Exp type, Burdened cost, pa date, gl date, period, exp item date, transeferred date, transaction source, expenditure comment, IBS Service center code, IBS transaction number.
IBS by Exp Type	Report of IBS expenditures on grants accounts, with page items for service center and expenditure type. Allows easy review of IBS charges by expenditure type.	Beginning and ending dates, project number	
Employee Effort by Period			
Effort only elements	Effort query that ties to effort statements generated by Sponsored Projects Administration (SPA). Includes effort only elements	Beginning and ending work date, employee number, post thru date.	Awd full name, element type, org name, emp name, emp number, fund, org, obj, project number, mission, program, amount, assignment number
All elements	Effort query that includes all elements and ties to HRDW Employee Labor Distribution Summary by Work Date. Excluding elements not included in effort report balances with effort statement/effort elements only tab.	Beginning and ending work date, employee number, post thru date.	Awd full name, element type, org name, emp name, emp number, fund, org, obj, project number, mission, program, amount, assignment number, use in effort report flag
Budget Queries			
Budget Installments	Several different views of OGA budget and installment related data, including comments that help identify carryover and other budget entries.	Award Number	
Budgets			
Budgets w/ Comments			

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REPORT NAME	DESCRIPTION	Parameters	Fields on Report
Award Summary			
PI Award Summary by Project	Report with page item list for PI, listing awards broken out by project	Queries show projects where user has a role.	
Award Summary by PI	Award Summary report by PI		
Award Installments			
Award-Project Funding	Report that shows awards and projects funded		
Project Budget Breakout	Report that breaks out project budgets		
Award Installments	Different listings of award installments from OGA. Not to be confused with official award reporting.		
PI Installments by Award Number			
PI Installment by Award-installment amounts			
Award References			
By Award	Listings of award reference fields from OGA		
By PI			
Award Listings			
Awards	Different listings of awards from OGA. Not to be confused with official award reporting.	Queries show projects where user has a role.	
PI Awards			
Org Awards			
Org Awards/Projects			
Funding Source, Org Awards			
Funding Source Awards			
Project Personnel			
Project Roles	Different listings of personnel assigned to projects		
PI Roles by Project			
Project Roles by Project			
Employee Roles			