

Project Status Details – by Expenditure Description

You are now able to run this report with either a PDF output or an Excel output. The default output is PDF. There are also two new parameters: You may now run the report by PI, and you have the option Print Encumbrances or not Print Encumbrances. The Date parameter is required and you must choose to use either the Project Number or the PI name.

The screenshot shows the ZGMS Project Status Detail Report interface. The main window title is "ZGMS Project Status Detail Report- by Expenditure Description". The interface includes a header section with "OHSU Operating Unit" and "American English". Below this are buttons for "Language Settings..." and "Debug Options". A section labeled "As Soon as Possible" contains a "Submit" button. A "Parameters" dialog box is open in the foreground, containing the following fields:

- Project Number: [Empty]
- PI Name: [Empty]
- Date: [Empty]
- Print Encumbrance? Yes

Buttons at the bottom of the dialog include "OK", "Cancel", "Clear", and "Help".

The screenshot shows the "Parameters" dialog box with the following fields filled in:

- Project Number: **GVOLL0225E**
- PI Name: [Empty]
- Date: **APR-11**
- Print Encumbrance? Yes

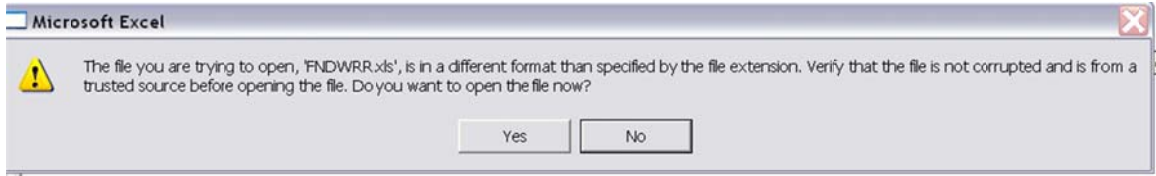
Buttons at the bottom of the dialog include "OK", "Cancel", "Clear", and "Help".

Next you choose which output you want: PDF or Excel. Click on Options to make your choice.

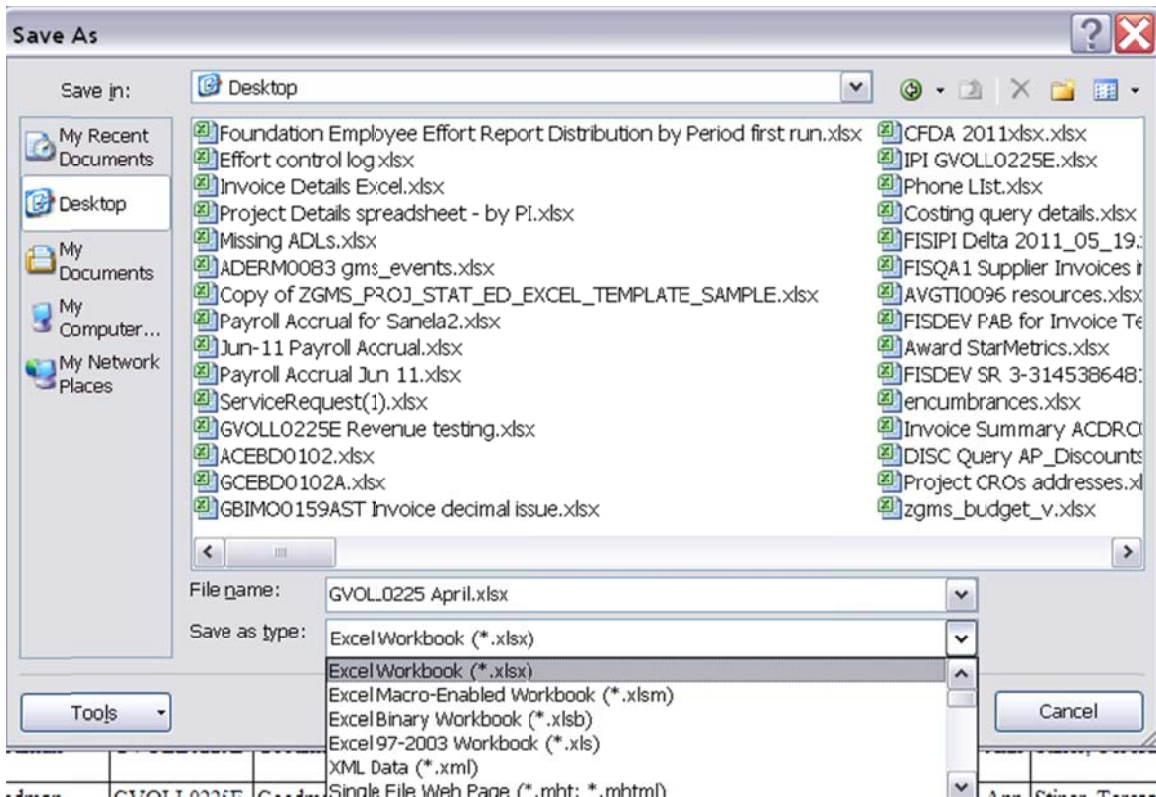
Click in the field under Template Name. **DO NOT TRY TO CHANGE THE FORMAT BY CLICKING IN THE FORMAT FIELD.** Chose which Template to use, click OK and then OK again, (to close both windows) and then click Submit. Do Not set the Excel format to directly Print upon completion. For this example I am using the Excel Template

Template Name	Template Language	Format	For Language
ZGMS: Project Staus Deta	English: United States	PDF	AMERICAN

When the report has finished, click View Output. You may receive the following popup:



Click Yes. The file opens in an .exe file extension, so you will need to save the file in .xlsx format



You now have an excel spreadsheet that is easy to work with.

If running the report in PDF format, you can set the PDF format to print upon completion or you can open the report and use the Print icon or save to a file.