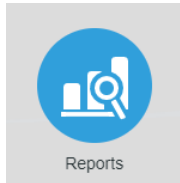


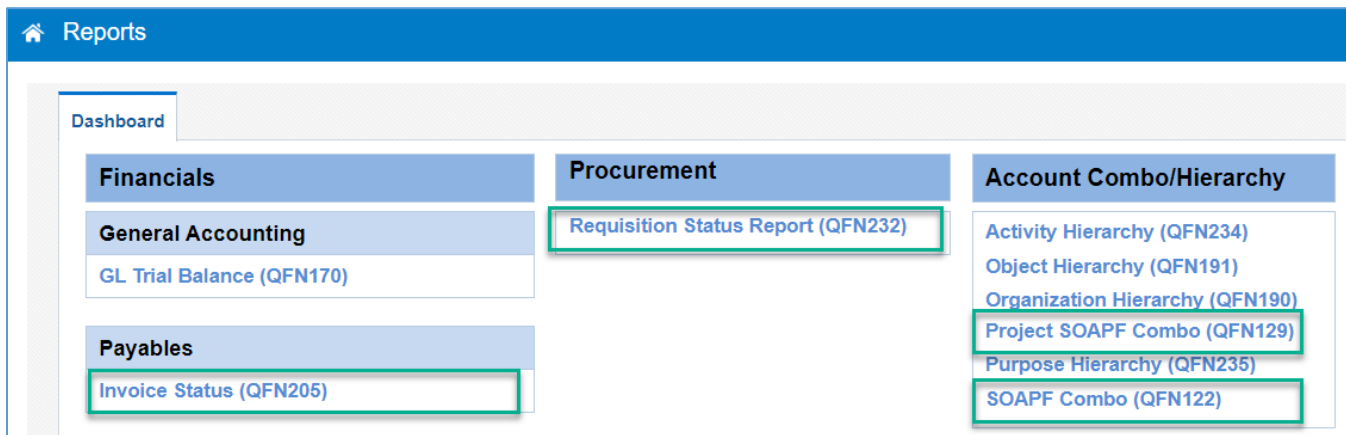
PO and PR Reports in Analytics and Financials

(RAC Mentoring session Sept 28, 2023)

Quantum Analytics Report	Notes
<u>Award Detail</u> Sponsored Management Dashboard Comprehensive details necessary to manage an individual award or project. Includes budget to actual as well as various reports of revenue and expense activity on an inception-to-date basis. (9 reports, 7 Infotiles, 6 “Views” of POs and PRs)	Award and Project Profiles; Award financial summary Infotiles; Filter on Object, Project and Funding Source. Period Activity, LTD (Lifetime to Date) Costs, Raw Commitments (encumbrances), Burn Rate, etc. Includes 5 secondary reports: What are the POs and PRs on This award?, Who is being funded?, What is the History of Funding?, What’s been billed & collected?, What is the activity on 7062/7072 reports. Note: The What are the POs and PRs report is referred to as the “R50” report. Attribute 2 displays the Invoice number for POs, or the PO# for Reqs), or the Type of Service when using the default Purchasing Document View. Tip: Use the Move to Prompts technique to get a pick list to view PO Invoiced Amounts only accounting events. Tip: Right Click on column “Object Level C” & select “Include” Object Drill Down on \$\$\$ opens Transaction Details report on separate web page that can be viewed by 1 or more months (quarterly reporting).
<u>Budget to Actuals Detail</u> (SOAPF equivalent to the Award Detail report) All Activities Management Dashboard Comprehensive review of activity for a single SOAPF code. Includes comparison to budget, previous fiscal years, and various reports on transactions and current balances. Ideal for managing an individual budget. Drillable to transaction detail.	Includes 2 secondary reports: Who is Being Funded? and What are the POs and PRs? The Who is being funded secondary radio button is selected by default. Note: The What are the POs and PRs report is referred to as the “R50” report. Attribute 2 displays the Invoice number for POs, or the PO# for Reqs), or the Type of Service Tip: Use the Move to Prompts technique to get a pick list to view PO Invoiced Amounts only accounting events.
<u>Search</u> Sponsored Management Dashboard Identify Quantum awards and Quantum projects meeting various criteria. (8 reports, 30 columns of data) HINT: To search Kuali Research proposals and awards utilize the Kuali download pages on the download dashboard.	Extremely versatile for Award, Project, and Key Personnel reporting. 30/60/90 day reports, Active vs. Inactive Excellent for Combining your Org & Award Type, Billing Basis, Sponsor or Sponsor Type or just a PI. Columns of data include: Award Type, Billing Basis, Sponsor, Sponsor Type, Award PI, Start/End Dates, Funding Allocated/Issued, Budget, LTD Costs, etc. Tip: Great for Departmental & PI based reporting, Award closing, etc. BUT DOES NOT include PO or PR data.
<u>Find My Award</u> Sponsored Management Dashboard Having trouble finding your Award Number but you know other attributes like the Project Number, PI, Owning Organization, and Sponsor? Use this page to more quickly identify Awards.	Quick and easy way to find awards. The results are hyperlinks that open the Award Detail (in a second browser tab) in when selected.



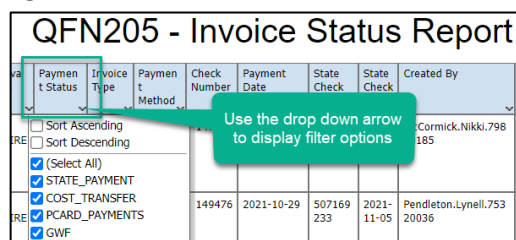
For those who have access to Quantum Financials, there are some reports that you may find helpful:



Quantum Financials Report	Notes
Invoice Status (QFN205) Returns 27 columns of data	This report allows end users to verify the approval and validation statuses for invoices and payment status for Supplier invoices.. It offers twelve (12) Report Selection Parameters including Project, Award, and SOAPF.
Requisition Status Report (QFN 232) Returns 20 columns of data	This provides Quantum Financials users access to search for requisition data. It offers eight (8) Report Selection Parameters including Supplier, Org, who entered it, Requester, Award, Project. Tip: Results in 23 columns of information including Req # and Description; Status, Approver, Created By, Requested By, PO #, Charge Acct #, Amount, Status, etc. .
Project SOAPF Combo (QFN129) Returns 18 columns of data	This report is used to identify SOAPFs associated with awards or projects. Five (5) Selection Parameters include Business Unit; Award; Project; Org; and Project Status.
SOAPF Combo (QFN122) Returns 12 columns of data	This report is used to identify SOAPFs. Five (5) Selection Parameters include: Business Unit; Award; Project; Org; and Project Status. Tip: Use the Refresh Icon to view the report in Financials or the View Report icon to view in Excel or PDF formats.

Tip: Reports can be viewed in several formats including “Interactive” which enables you to “filter” the list by one or more columns (like Excel). HTML uses whatever browser you use to generate a printable report. PDF uses your local copy of Adobe to generate and Excel creates a downloaded file for MS Excel.

QFN205 - Invoice Status Report



Payment Status	Invoice Type	Payment Method	Check Number	Payment Date	State Check	State Check	Created By
(Select All)							Cormick,Nikki.798185
☒ STATE_PAYMENT							
☒ COST_TRANSFER							
☒ PCARD_PAYMENTS							
☒ GWF							
			149476	2021-10-29	507169233	2021-11-05	Pendleton,Lynell.75320036

