

# Sponsored Management Dashboard Reports

<u>Report</u>	<u>Notes</u>
<p><b><u>Award Detail</u></b> 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)</p>	<p><b>Award and Project Profiles; Award financial summary Infotiles; Filter on Object, Project and Funding Source.</b> Period Activity, LTD Costs, Raw Commitments, Burn Rate, etc. <b>Tip:</b> Right Click on Object Level C column and select Include Object! <b>Drill Down on \$ values opens Transaction Details report</b> on separate web page that can be viewed by one or more months (<b>quarterly reporting</b>). <b>Includes 5 secondary reports</b> such as What are the POs and PRs?, Who is being funded?, What is the History of Funding?, What’s been billed &amp; collected?, 7062/7072 reports. When <b>drilling down on Salary or Fringe</b>, you can generate a report by <b>Payroll or Transaction Detail</b>.</p>
<p><b><u>PI Profile</u></b> Provides a one-stop shop to provide information on the entire sponsored portfolio of an individual Principal Investigator. Drillable to Award Detail for a deeper analysis of each award. (9 reports, 18 columns of data)</p>	<p><b>Shows all Active or Inactive projects or awards for a PI.</b> <b>Includes 5 secondary reports</b> such as: Who is being funded?, Proposals still pending, Proposals committed to, Awards committed to, What has been billed and collected? <b>Columns of data include:</b> Billing Basis, Days From End Date, Budget items, Burn Rate and more. <b>Tip:</b> <b>Award Hyperlink opens an award in Award Detail report.</b></p>
<p><b><u>Search</u></b> Identify Quantum awards and Quantum projects meeting various criteria. (8 reports, 30 columns of data) <b>HINT:</b> To search Kualii Research proposals and awards utilize the Kualii download pages on the download dashboard.</p>	<p><b>Extremely versatile for Award, Project, and Key Personnel reporting.</b> <b>30/60/90 day reports</b>, Active vs. Inactive, <b>Columns of data include:</b> Award Type, Billing Basis, Sponsor, Sponsor Type, Award PI, Start/End Dates, Funding Allocated/Issued, Budget, LTD Costs, etc. <b>Tip:</b> Great for Departmental and PI based reporting.</p>
<p><b><u>Trends</u></b> Analyze year-over-year trends of sponsored proposals, awards, and expenditures on a fiscal year basis. Includes graphical and tabular displays of the data. Provides Chart and Pivot Tables view results: (9 Kualii Proposals, 12 Kualii Awards, and 12 Quantum Financials)</p>	<p><b>Excellent tool for looking at school and departmental proposal and award trends based on several factors</b> such as PI, Sponsor Type, Sponsor, etc. <b>Tip:</b> <b>Can view results as graphs or Pivot Table.</b> Results have drill down hyperlinks to specific reports and are printable and exportable. <b>Direct and Indirect Amount “Views”</b> are available.</p>
<p><b><u>Find My Award</u></b> 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.</p>	<p><b>Quick and easy way to find awards.</b> The results are hyperlinks that open the Award Detail (in a second browser tab) in when selected.</p>
<p><b><u>F&amp;A Yield</u></b> Displays “F&amp;A Yield” – a calculation of the yield of the effective indirect cost rate, expressed as a percentage of total direct costs. Page provides users the option to see the results either with or without Cost Share.</p>	<p><b>Quick and easy F&amp;A Yield report.</b> Includes Infotile summaries as well as a chart, pivot table summary, and details by Project or Object level.</p>
<p><b><u>SPP 7062 Activity</u></b> Displays all study participant payment (SPP) activity processed through Object 7062 (Cash Study Participant Pay), including the initial issuance of the working fund check and the debit memo reallocations to Object 3125 (Participant Study Pay Group) reflecting distributions to participants. Drillable to NONPO invoice and debit memo details.</p>	<p><b>Two report selection options:</b> 1) SPP 7062 GL and 2) SPP 7062 Transaction Details <b>The SPP 7062 GL report summarizes for AP Working Fund</b>, and provides separate reports for Abbreviated and All Columns. <b>The SPP 7062 Transaction Detail report has more criteria options</b> (Dashboard Prompts), lists all transactions, and includes State Check Date and Number.</p>
<p><b><u>MGIC 7072 Activity</u></b> Displays all activity processed through Object 7072 (Cash MGIC Accounts) used to track global funding and related expenditures. The report includes STO Wire Transfers and State Payments, as well as the related debit memos charging expenditure Objects. Drillable to NONPO invoice and debit memo details.</p>	<p><b>Two report selection options:</b> 1) GL and 2) Transaction Details Both return reports as one dataset (non pivotized).</p>

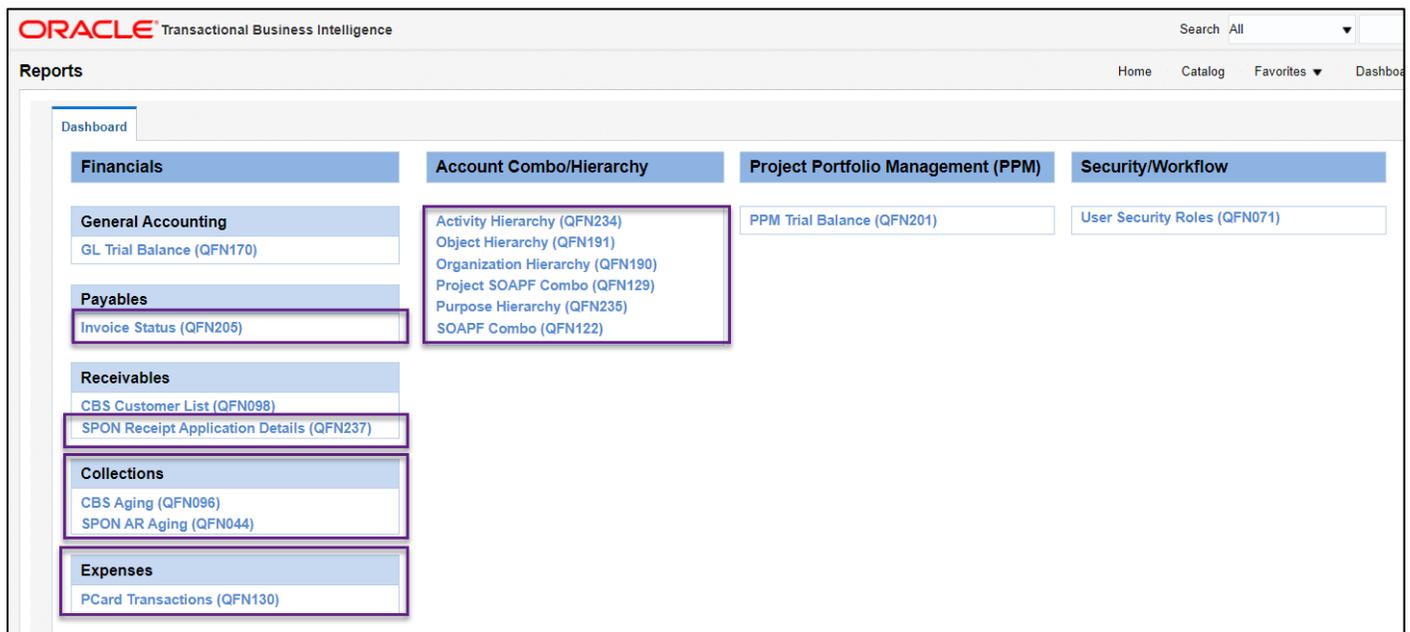
### Budget to Actuals Summary

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.

**Great report for viewing all SPON and Cost Share finances in a Fiscal Year.**

**Tip:** Combine your Org with specific "Source" Codes:  
 315 C&G- Federal; 335 C&G- State & Local; 345 C&G- State & Local – Fed Prime; 365 C&G- Private; 375 C&G- Private- Fed Prime; 285~ Share

**For end users who have access to Quantum Financials, there are several reports that user may find helpful:**



The screenshot shows the Oracle Transactional Business Intelligence (OTBI) Reports page. The page title is "ORACLE Transactional Business Intelligence" and it includes a search bar with "All" selected. The main heading is "Reports" with navigation links for Home, Catalog, Favorites, and Dashboard. The page is organized into a grid of report categories:

- Financials**
  - General Accounting
    - GL Trial Balance (QFN170)
  - Payables
    - Invoice Status (QFN205)
  - Receivables
    - CBS Customer List (QFN098)
    - SPON Receipt Application Details (QFN237)
  - Collections
    - CBS Aging (QFN096)
    - SPON AR Aging (QFN044)
  - Expenses
    - PCard Transactions (QFN130)
- Account Combo/Hierarchy**
  - Activity Hierarchy (QFN234)
  - Object Hierarchy (QFN191)
  - Organization Hierarchy (QFN190)
  - Project SOAPF Combo (QFN129)
  - Purpose Hierarchy (QFN235)
  - SOAPF Combo (QFN122)
- Project Portfolio Management (PPM)**
  - PPM Trial Balance (QFN201)
- Security/Workflow**
  - User Security Roles (QFN071)