



# Grants and Projects: Reports



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# Reports

Use the Table of Contents to access a page.

# SSA Grant Reports

## Grants and Projects > Reports > SSA Grant Reports

This page allows you to select the report you want to generate.

### Select a report:

All available report names are displayed on the left side of the page. The list of available reports remains displayed on the page even after you select a report name. This allows you to select another report within the selected reports menu without exiting the report page.

Click a report to select it. The parameters for the selected report are displayed on the right side of the page.

Type or select the report options. **Parameters in bold are required.**

Use the buttons located at the top of the page to generate the report. If the button feature does not apply to the selected report, it is disabled. For example, a certain report may not be available in the CSV format, so the **CSV** button will be disabled when that report is selected.

- **Preview** - Click to generate the HTML view of the report.
- **PDF** - Click to generate a PDF file of the report.
- **CSV** - Click to generate a CSV file of the report.
- **Clear Options** - Click to clear data from all parameter fields.

[Review, save and/or print the report.](#)

### Sort and filter:

Some reports may or may not provide the sort and/or filter option.

<p><b>Sort</b></p>	<p><b>Sort report data:</b>                  You can sort data to make it easier to review or find records in the reports. Not all reports allow this option.                  From the report window, click <b>Sort/Filter</b> to open the Sort/Filter window. By default, the <b>Sort Criteria</b> section is expanded. If not, click <b>Sort Criteria</b>.</p>	
	<p><b>(Left grid) Columns Available for Sorting</b></p>	<p>Select the columns by which you want to sort, the columns are highlighted blue. Click ► to move the selected columns to the right side of under <b>Sort Columns</b>. Continue moving columns to the right grid as needed.</p>
	<p><b>(Right grid) Sort Columns</b></p>	<p>You can rearrange the columns to indicate the order in which you want the sort applied. Click a column name, and drag it up or down to a new location.                  In the right grid, for each column, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.                  To remove a column from the sort, select the column, and then click to move it back to the left grid.</p>
<p>Click <b>OK</b> to apply the selected sort criteria to the report.                  Click <b>Cancel</b> to close the window without re-sorting.</p>		

<b>Filter</b>	<b>Filter report data:</b> When you want to view only certain data, you may find it useful to filter the report data. You can use specific criteria to retrieve only the data that you want. Not all reports allow this option. From the report window, click <b>Sort/Filter</b> to open the <b>Sort/Filter</b> window. By default, the <b>Sort Criteria</b> section is expanded. Click <b>Filter Criteria</b> to expand the <b>Filter Criteria</b> section. If the report does not allow sorting, the <b>Filter</b> button is displayed instead of the <b>Sort/Filter</b> button, and sort criterion fields are not available. Click <b>Add Criterion</b> to add new filter criteria. A blank row is displayed in the grid.	
	<b>Field</b>	<b>Description</b>
	<b>Column</b>	Select a column by which to filter the data. The drop down lists the columns that appear on the report.
	<b>Operator</b>	Select an operator. = Equals ≠ Not equals < Less than ≤ Less than or equal to > Greater than ≥ Greater than or equal to
	<b>Value</b>	Type the value by which you want to filter. For example, if you selected a date in the <b>Column</b> field, type a date to view only data for a specific date.
	<b>Other functions and features:</b>	
	<b>Add Criterion</b>	<a href="#">Add another row.</a> Select the logical connector ( <i>AND</i> or <i>OR</i> ) in the <b>Logical</b> field. Continue adding rows as needed. Using the <i>AND</i> operator limits search results, because the program looks only for records that contain both criterion. Using the <i>OR</i> operator expands search results, because the program looks for records that contain either one criterion or the other, or both.
	<b>Delete Selected</b>	<a href="#">Delete selected row.</a> Select the row, and then click the <b>Delete Selected</b> button. The row is deleted from the filter criteria.
	<b>Click OK to apply the selected filter criteria to the report.</b> <b>Click Cancel to close the dialog box without applying a filter.</b>	
	<b>Reset</b>	<a href="#">Reset report data.</a> Click to restore the report to the original view, removing all sorting and filtering that has been applied.
<b>Reset</b>	<a href="#">Reset report data:</a> Click to restore the report to the original view, removing all sorting and filtering that has been applied.	






# GP1300 - Grant Detail General Ledger Report

**Grants and Projects > Reports > SSA Grant Reports > Grant Detail General Ledger Report**

This report provides a list of detailed transactions from the general ledger for a specified grant code. You can view grant/project data for the entire grant period regardless of the school year or file ID, or you can retrieve data based on the school year, file ID, and from/to accounting periods. To narrow the list of transactions to a specific accounting period range within a file ID, use the **From-To Account Period; School Year** ellipsis lookup to specify the from/to accounting periods.

Vendor transactions allow for the printing of either the name of the vendor or the reason for the transaction. Report information is displayed based on the masked account codes set in the User Profiles table for the logged-on user.

Parameter	Parameter Description
<b>Grant/Project Profile Code</b>	Type a grant/project code, or click  to select a code from the <a href="#">Grant and Project Codes lookup</a> . This code determines the school years, file IDs and accounting periods to be included in the report.  This is a required field.
<b>From-To Account Period; School Year</b>	Type the five-digit file ID and accounting period range to be included where the first character represents the one-digit file ID and the following four characters represent the accounting period range. For example, for file ID 1 and accounting period range 06-07, type 10607. Or, click  to select a code from the <a href="#">Grant School Year Range lookup</a> .  This is a required field.
<b>Print Vendor Name (N), Reason (R)</b>	N - Print the vendor name on the report.  R - Print the reason on the report.  This is a required field.
<b>Include Requisition soft encumbrance transactions when PO encumbrance exists? (Y/N)</b>	Y - Include requisition soft encumbrance transactions on the report when a purchase order encumbrance exists.  N - Do not include requisition soft encumbrance transactions on the report when a purchase order encumbrance exists.  This is a required field.
<b>Use Check date (C) or Transaction date (T) for check transactions</b>	C - Use the check date for check transactions on the report.  T - Use the transaction date for check transactions on the report.  This is a required field.



Parameter	Parameter Description
<b>Enter significant digits for fields to select on</b>	Type the account code numbers or account code number mask separating multiple account code numbers with a comma (e.g., 199-XX-XXXX.XX-XXX-XXXXXX, 224-XX-XXXX.XX-XXX-XXXXXX). Or, click  to create an account code mask. Otherwise, leave blank to use all account codes.
<b>Enter Optional Report Title</b>	Type a report title using a maximum of 60 alphanumeric characters.

[Generate the report.](#)

# GP1100 - Grant Payment Transaction Report

**Grants and Projects > Reports > SSA Grant Reports > Grant Payment Transaction Report**

This report provides a list of grant payment transactions.



Parameter	Parameter Description
<b>Sort by Grant (T), Member (M)</b>	T - Sort the report by grant type.  M - Sort the report by grant member/county district number.  This is a required field.
<b>From Date (MMDDYYYY)</b>	Type the from date in the MMDDYYYY format for which you want to retrieve grant transactions. This is a required field.
<b>To Date (MMDDYYYY)</b>	Type the to date in the MMDDYYYY format for which you want to retrieve grant transactions. This is a required field.
<b>Select Grant Type(s) or blank for ALL</b>	Type a grant type separating multiple types with a comma. Or, click  to select a grant type(s). Otherwise, leave blank to include all grant types.
<b>Select Member(s) or blank for ALL</b>	Type a six-digit member/county district number separating multiple numbers with a comma. Or, click  to select a member(s). Otherwise, leave blank to include all members.

[Generate the report.](#)

# GP1000 - Grant Summary Status Report

**Grants and Projects > Reports > SSA Grant Reports > Grant Summary Status Report**

This report provides a summary of grant status information.



Parameter	Parameter Description
<b>Sort by Grant (T), Member (M), Grant Year (Y)</b>	T - Sort the report by grant type. M - Sort the report by grant member/county district number . Y - Sort the report by grant year. This is a required field.
<b>Select Status for Grant Year &amp; Grant ID Active (A), Closed (C), Canceled (X) or blank for ALL</b>	A - Include grant years and IDs with an active status. C - Include grant years and IDs with a closed status. X - Include grant years and IDs with a cancelled status. Blank for All - Include all grant years and IDs regardless of status.
<b>Select Grant Year (YYYY) or blank for ALL</b>	Type a grant year in the YYYY format. Or, leave blank to include all grant years and IDs regardless of grant year.
<b>Select Grant Type(s) or blank for ALL</b>	Type a grant type separating multiple types with a comma. Or, click  to select a grant type(s). Otherwise, leave blank to include all grant types.
<b>Select Member(s) or blank for ALL</b>	Type a six-digit member/county district number separating multiple numbers with a comma. Or, click  to select a member(s). Otherwise, leave blank to include all members.

[Generate the report.](#)

# GP1200 - Past Final Date Without Final Report

**Grants and Projects > Reports > SSA Grant Reports > Past Final Date Without Final Report**

This report provides a list of grant years and IDs that have a **Final Report Due Date** without a reimbursement transaction designated as the final reimbursement for the grant year and grant ID before the date entered in the **Effective Date** report parameter.

Parameter	Parameter Description
<b>Effective Date (MMDDYYYY)</b>	Type the effective date in the MMDDYYYY format from which you want to retrieve grant transactions. This is a required field.
<b>Select Grant Year (YYYY) or blank for ALL</b>	Type a grant year in the YYYY format. Or, leave blank to include all grant years and IDs regardless of grant year.
<b>Select Grant Type(s) or blank for ALL</b>	Type a grant type separating multiple types with a comma. Or, click  to select a grant type(s). Otherwise, leave blank to include all grant types.
<b>Select Member(s) or blank for ALL</b>	Type a six-digit member/county district number separating multiple numbers with a comma. Or, click  to select a member(s). Otherwise, leave blank to include all members.

[Generate the report.](#)