### Current Report Components: By Type

- **By Award**
  - 1. Budget
  - 2. Expense
  - 3. Available Balance
  - 4. Cash (Internal Claimed, Billed & Unbilled)
  - 5. Assets & Liabilities
  - 6. Projects
  - 7. Encumbrance
  - 8. Revenue
  - 27. Project Resource Expenses

### Compass Reports

- **Grants Quick View – Award Page (Compass)**
  - Rolls each project up for total award information
- **FORS: Sponsored Research Balance Sheet Summary (formerly Cash Balance report)**
  - A High Level Balance Sheet Report for an Award
  - Can drill down to project level
- **Custom Report: EUOGERC009_A/R Reconciliation by Operating Unit**
  - A Balance Sheet Report for each project in an award; also reconciles the GL & PROJ_RES tables

### Report Timeframe & Updates

1. Month to Date
2. Year to Date
3. Grant Year to Date
4. Life to Date
5. Updated Nightly
6. Calendar Month & Date
7. Updated at Run Time
8. Available via other reports or methods
Types of Information

**Compass Reports**

- **Custom Report:** EUOGC009_A/R Reconciliation by Operating Unit
  - A Balance Sheet Report for each project in an award; also reconciles the GL & PROJ_RES tables

- **nVision:** SPP2242
  - Shows one project’s budget and expense information by account codes

- **Grants Quick View – Project Page (Compass)**
  - This is the one stop shop for a project’s information: Shows one project’s budget and expense information by account codes; project burn rate; Active SmartKeys and project team (key personnel)

- **FORS: Sponsored Projects Trend**
  - Shows one project’s budget and expense information for a selected grant year by account codes; Includes employee salary

- **Custom Report:** EUOGC901_Employees Paid From Project
  - Shows employees information and a historical payroll % for a project

- **FORS: Sponsored Research Balance Sheet Summary (formerly Cash Balance report)**
  - Same data as award level with additional identifiers for operating unit, department and project id

**Current Report Components: By Type**

- **By Project**
  - 1. Budget
  - 2. Expense
  - 3. Available Balance
  - 4. Cash (Internal Claimed, Billed & Unbilled)
  - 5. Encumbrance
  - 7. SmartKey
  - 8. Revenue
  - 9. Committed Effort
  - 10. Monthly Burn Rate
  - 11. Salary by Employee
  - 12. Employees on Project
  - 13. Employee Information (ID & Dept ID)
  - 14. Payroll Effort % (Historical)

- **Compass Reports**
  - **Custom Report:** EUOGC009_A/R Reconciliation by Operating Unit
  - A Balance Sheet Report for each project in an award; also reconciles the GL & PROJ_RES tables
  - **nVision:** SPP2242
    - Shows one project’s budget and expense information by account codes
  - **Grants Quick View – Project Page (Compass)**
    - This is the one stop shop for a project’s information: Shows one project’s budget and expense information by account codes; project burn rate; Active SmartKeys and project team (key personnel)
  - **FORS: Sponsored Projects Trend**
    - Shows one project’s budget and expense information for a selected grant year by account codes; Includes employee salary
  - **Custom Report:** EUOGC901_Employees Paid From Project
    - Shows employees information and a historical payroll % for a project
  - **FORS: Sponsored Research Balance Sheet Summary (formerly Cash Balance report)**
    - Same data as award level with additional identifiers for operating unit, department and project id

**Report Timeframe & Updates**

- **Month to Date**
- **Year to Date**
- **Grant Year to Date**
- **Life to Date**
- **Updated Nightly**
- **Calendar Month & Date**
- **Updated at Run Time**
- **Available via other reports or methods**
Types of Information

Current Report Components: By Type

- By PI
  - 1. Budget
  - 2. Expense
  - 3. Available Balance
  - 6. Encumbrance
  - 16. Active Awards & Project IDs
  - 17. Awarded Amount (Direct $, Indirect $, & Total $)
  - 18. Proposals
  - 19. Proposal Status
  - 20. Proposal Submission Due Date
  - 9. Committed Effort
  - 21. Certified Effort (Available in Effort Reporting System)
  - 22. Payroll Effort (Available in Effort Reporting System)

Compass Reports

- Custom Report: EUOGC003_PI Project Summary
  - Shows all of a PI's active projects with committed effort & awarded amounts
- Custom Report: EUOGC005_PI Project Balances
  - Shows all of a PI's projects with available balances
- Grants Quick View – PI Page (Compass)
  - A summary page with proposal, award, and effort information
- Effort Reporting System

Report Timeframe & Updates

1. Month to Date
2. Year to Date
3. Grant Year to Date
4. Life to Date
5. Updated Nightly
6. Calendar Month & Date
7. Updated at Run Time
8. Available via other reports or methods