EFS Reports & Queries
Grants Management User Network
October 9, 2008

Objectives
- Observations from labs
- Issue resolution
- Delivered reports
- Future reports & queries
Observations from labs

- Partnered with Training Services
  - Three reporting labs
  - Four "sponsored only" labs (1 in Duluth)
- General Observations
  - Understanding run controls
  - Proposal Number = Award Number = Contract Number
  - NOGA dynamic and contains paths to find same information online
  - Query Viewer

Issue Resolution

- Call received by Helpline
- Assigned to either SWAT or BPO
- BPOs meet weekly with respective SWAT teams
- BPOs prioritize production issues that are assigned to SWAT
- BPOs responsible for communication of production issues and resolutions
Delivered Sponsored Reports

- Sponsored Transaction Detail – Expenses
  - No known issues
  - Generate to excel – unique steps
  - Future enhancement – none as of today

Delivered Sponsored Reports

- UM Sponsored Award Overview
  - Capital equipment encumbrances not displaying on report
  - Generate to excel – not easy to re-format
  - Future enhancements – subtotal direct and indirect, generate by a variable begin and end date (currently cumulative)
Delivered Sponsored Reports

- UM Sponsored Project Detail
  - Capital equipment encumbrances not displaying on report
  - Generate to excel – not easy to re-format
  - Future enhancements – subtotal direct and indirect, generate by a variable begin and end date (currently cumulative)

Delivered Sponsored Reports

- UM Sponsored Award Summary
  - Capital equipment encumbrances not included in total on report
  - Generate by College option has incorrect Tree Node
  - Generate to excel – not easy to re-format
  - Future enhancement – none as of today
Queries

- Query Viewer
  - Categorize existing queries
  - Standard naming conventions
  - Better detail on what the query pulls
  - Create query for detail on delivered sponsored reports (resolve the reformatting challenges)

Future Reports & Queries

- Solicit feedback from GMUN for
  - Future enhancements to existing reports
  - Other reporting/query needs
- Categorize and track
- Partner with GMUNAC to prioritize enhancements & future needs
Resources

- EFS-SP site
  www.ospa.umn.edu/efs_sp/index.htm
- Web site: www.finsys.umn.edu
- Email: finsys@umn.edu

What are Your Questions?

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