## **Finding Grants Budget Information**

A. Reports: There are reporting tools available in the Data Warehouse to find project budget balances and expenditure data.

→The Project Status Report (PSR) is used to determine available balances to spend on sponsored or non-sponsored projects. This report shows budget-to-actual information at the summary level, with filters for PI and department, among others. The PSR is presented in Power BI format for more point-and-click functionality, in contrast to most of the other project reporting, which is Excel-based.

→The Project Status Cube can be used to view budget-to-actual information at the summary or detail level. This cube will download as an excel spreadsheet and utilizes "pivot table" functionality.

To access reports in the Data Warehouse:
☐ Navigate to reports.uga.edu and sign in to CAS with your MyID and Password.
☐ In the Available Reports page, click the **Most Commonly Used** link.
☐ Click the **Reporting Portal** link on the Data Warehouse Reports and Analytics page.
☐ Log in to the Reporting portal using your **MyID** and password.
☐ Click the **All UGA Faculty and Staff Reports** link.
☐ Click the **Financial** link.
☐ You can find the Project_Status_Report under the **POWER BI REPORTS** and the Project_Status_Cube in the **PAGINATED REPORTS** area.
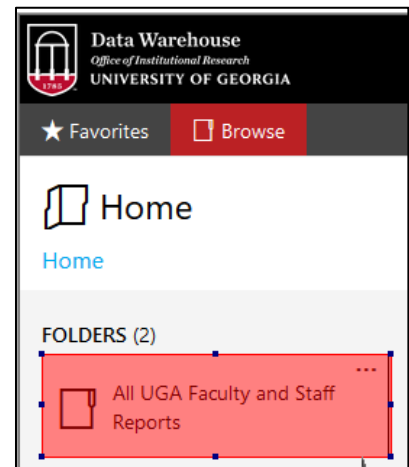
B. Queries: Queries have been created to help you retrieve information from the UGA Financial Management System.

→ **What Queries are Available?**
Queries continue to be created as needs are identified. There are currently over 300 queries developed exclusively for UGA use, in addition to PeopleSoft default queries. Find out more about this process on the Reports Resources page on the OneSource website.

→ **Where Can I Find the Queries I Need?**
You can use reports.uga.edu to find a listing and descriptions of queries and reports that have been created to use within the OneSource systems (UGA Financial Management, UGA Budget Management, Data Warehouse, Simpler, and OneUSG Connect). You can click on any of the drop-down arrows on that page to see a list of reports available by topic.

QUICK START FOR GRANTS (FINANCIAL PRACTITIONERS)

Some Commonly Used Queries in Grants are:

Budgets and Balances	**UGA_KK_DEPT_BUDGET_BALANCE**	This query shows Departmental Budget, Encumbrances, Expenditures and Balances by all ChartFields.
Detail Expenditure by Project	**UGA_GM_OP_EXP_DETAIL**	This query shows fully processed detail level transactions by project.
Detail Expenditure by Department	**UGA_GM_OP_EXP_DETAIL_BYDEPT**	This query shows fully processed detail level expenditures by department.
Detail Expenditure by Award	**UGA_GM_OP_EXP_AWD_DETAIL**	This query lists fully processed detail level expenditures by award.

Many additional queries are available, with new queries being created frequently. You can search queries from within the Query Viewer as well, as explained below.

→ How Do I Run a Query?

Queries are run using the Query Viewer in the UGA Financial Management system.

☐ In the UGA Financial Management System, use the Employee Self-Service drop-down list to select the **UGA Financials** homepage.
☐ On the UGA Financials homepage, click the **Query Viewer** tile.
☐ This will open the Query Viewer Search Page:

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By [Query Name ▾] begins with [_____]

[Search] Advanced Search

The Query Viewer Search Page allows you to search for a query by name. The naming convention begins with UGA_XX_Description, where XX = the name of the module for which the query was developed. Query names cannot contain spaces. You can also type "UGA" to see a list of all UGA queries, or "UGA_XX" for all queries associated with a particular module. You can change the drop-down box to search in different ways, or you can use the Advanced Search for more options.

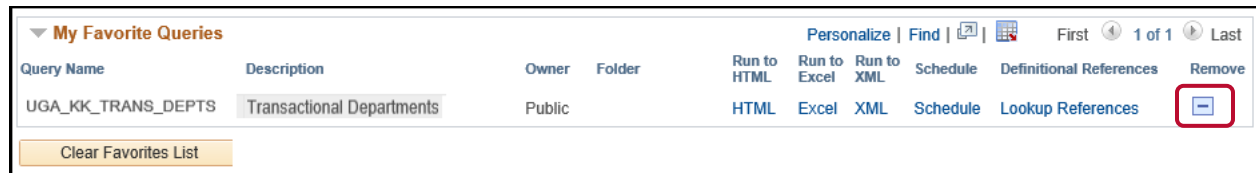## → Can I Save the Queries I Use Most Often?

Yes! You can build a My Favorites Queries list that will appear each time you open Query Viewer. To add a query to this list, search for it on the search page. Once it appears in the Search list, mark it as a favorite.

UGA_KK_TRANS_DEPTS Transactional Departments Public COA **HTML** Excel XML Schedule Lookup References Favorite

The selected query will appear in the My Favorite Queries. This list will appear beneath the search menu each time you open Query Viewer.

To delete a query, use the Remove button (minus sign) at the end of the row. To clear the entire list, click the Clear Favorites List button.

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove
UGA_KK_TRANS_DEPTS	Transactional Departments	Public		HTML	Excel	XML	Schedule	Lookup References	−

Clear Favorites List

Additional Information:

- You can find tutorials on how to run queries in the OneSource Training Library (https://training.onesource.uga.edu/)
- You can access descriptions of queries and reports you may need from reports.uga.edu and in the Grants WorkeCenter in the UGA Financial Management System.