

OGA Reports in IRA: Budget vs. Actual by Month

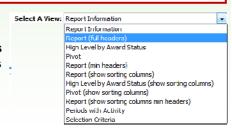
For a given month, this report summarizes current budget versus expenditures through month selected and current encumbrances by award, project, task and expenditure type.

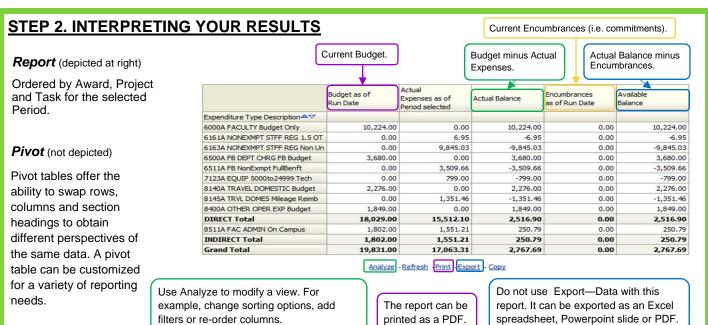
STEP 1. SETTING UP YOUR QUERY

Utilize the dropdown arrow on one or more filters to specify how you want the data to be filtered. Period Name is required. If a desired filter value is not available in the dropdown, then click "More/Search..." to view additional available values. There is no "Apply" button to run the report. Any change to a filter will initiate the report once a Period Name is selected. Always reset Period Name first when updating filters.



After the query has run, select a view from the dropdown for output options. The report with 'full headers' is a standard view with a typical 16 column header (e.g. Award, Project, Task, Sponsor). The report with 'min headers' displays 3 columns in the header (Project, Task, Award). A view with 'show sorting columns' displays a standard view PLUS any columns that exist to properly sort data, but are purposefully hidden in a standard view. The report with 'show sorting columns min headers' displays sorting columns, and 1 column in the header (Award).





STEP 3. SAVING YOUR QUERY

To save your customized query, click Page Options then Save Current Customization. Next, name the report.

To retrieve your saved query, click Page Options then Apply Saved Customization. Next, select the appropriate report.

