



OGA Reports in IRA: Commitments

This report lists commitments (i.e. encumbrances) by award and project.

COMMITMENTS

STEP 1. SETTING UP YOUR QUERY

Utilize the dropdown arrow on one or more filters to specify how you want data to be filtered. The Award Name filter is preset to "B00000" to avoid running an unlimited query. If a desired filter value is not available in the dropdown, then click "More/Search..." to view additional available values. Click Apply to run the query.

After the query has run, select a view from the dropdown for output options. The report with 'full headers' is the standard view and displays a 15 column header (e.g. Award, Project, Task, Sponsor). The report with 'show sorting columns' displays the standard view PLUS any columns that exist to properly sort data, but are purposefully hidden in the standard view. Sorting columns are most helpful to customers that use standard views to create uniquely sorted customized reports.

STEP 2. INTERPRETING YOUR RESULTS

Report (depicted below)

The Office of Sponsored Projects maintains a comprehensive list of expenditure types which can be found at: www.dartmouth.edu/~osp/docs/ExpenditureTypes.xls

Encumbrances are listed cumulatively. An encumbrance amount of zero indicates there were no encumbrances for the particular expenditure type.

Current Commitments (i.e. encumbrances).

Expenditure Type	Vendor Name	Expenditure Item Date	Description	Po Number	Encumbrance Amount
7473A SUPPL LAB Disposables	BD Biosciences	12/3/2010	BD Primaria 100 mm Cell Culture Dish	1083829	1,302.00
8511A FAC ADMIN On Campus	BD Biosciences	12/3/2010	BD Primaria 100 mm Cell Culture Dish	1083829	130.20
Grand Total					1,432.20

Analyze - Refresh - Print - Export - Copy

Pivot Table (not depicted)

Pivot tables offer the ability to swap rows, columns and section headings to obtain different perspectives of the same data.

Use Analyze to modify a view. For example, change sorting options, add filters or re-order columns.

The report can be printed as a PDF.

Export options include PDF, Excel spreadsheet, Powerpoint slide or .csv data file.

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.