

## How to Show Transactions for a Range of Dates In Award Details Reports *Quarterly Reporting for Awards*

**Scenario:** There are times when users are required to report financial data on a quarterly basis. The Award Details report enables you to drill down on LTD (Life to Date) numbers, and from there set a “range of dates” (months that can cross fiscal years) to have the report display. Reporting like this is often required by Sponsors such as NIH, and for specific date ranges that may cross Fiscal Years.

**The Award Detail drill down offers date range options allowing you to view results for the period (month) or for multiple months**

**What Timeframe Matters to You?**  Show Transactions for Period Activity  **Show Transactions for Range of Periods**

Fiscal Year 2020 Fiscal Period Beg >= OCT-19 Fiscal Period End <= DEC-19  Exclude Cost Sharing Apply Reset

Selecting one of more Fiscal Year(s) will “filter” the Fiscal Period Beg and Fiscal Period End prompts to show only periods (months) within those Fiscal year(s).

Steps:

- 1) Run the Award Detail report and drill down on a LTD number (left click a number).
- 2) Select to drill down to the Transaction Detail and it will open the report result on another browser tab (window).

What is the Budget to Costs and Commitments Summary for this Award/Project? (QA4.P4.R10)  
Time run: 2/22/2022 10:57:00 AM

Object Level B	Cost Structure	Object Level C	Period Activity Amount	Budget	LTD Costs
B100-Direct Costs	MTDC	C100-Salaries	\$0.00	\$1,231,005.00	\$1,199,259.70
		C200-Fringe Benefits	\$0.00	\$384,429.00	\$401,013.72
		C300-Operating Expenses	\$183.90	\$60,344.00	\$205,618.80
	<b>MTDC Total</b>			<b>\$183.90</b>	<b>\$1,675,778.00</b>
Non-MTDC	C300-Operating Expenses		\$0.00	\$244,440.00	\$145,157.84
		<b>Non-MTDC Total</b>			<b>\$0.00</b>
<b>B100-Direct Costs Total</b>			<b>\$183.90</b>	<b>\$1,920,218.00</b>	<b>\$1,951,050.06</b>
B600-Indirect Costs	F&A	C600-Indirect Costs	\$47.81	\$452,641.00	\$459,732.54
		<b>F&amp;A Total</b>			<b>\$47.81</b>
<b>B600-Indirect Costs Total</b>			<b>\$47.81</b>	<b>\$452,641.00</b>	<b>\$459,732.54</b>
<b>Total Costs</b>			<b>\$231.71</b>	<b>\$2,372,859.00</b>	<b>\$2,410,782.60</b>

Analyze - Refresh - Print - Export

- 3) Select the option to “Show Transactions for a Range of Periods” option
- 4) Start with selecting one or more Fiscal Year(s) from the Fiscal Year prompt. Tab over to or click in the Fiscal Period Beg prompt and select a Fiscal Year Period.
- 5) Tab over to or click in the Fiscal Period End prompt and select an end period.
- 6) Click Apply.

**What Timeframe Matters to You?**  Show Transactions for Period Activity  **Show Transactions for Range of Periods**

Fiscal Year 2022;2021 Fiscal Period Beg >= --Select Value-- Fiscal Period End <= --Select Value--  Exclude Cost Sharing Apply Reset

Please select Fiscal Year and Fiscal Period. Refresh

MAY-21

JUN-21

JUL-21

AUG-21

SEP-21

OCT-21

Search...

above dashboard prompt to view Period Range Activity Transaction