REPORTING

ALL REPORTS
All reports will be available in every role. The information is identical, only the population changes. Users will only have access to the specific department(s)/college(s) for which they have requested access.

New in reports:
- Every report now has “All” as a department selection. Users that have access to multiple departments can select “All” to generate results for all of the departments for which they have security.

- All reports now have a search button that must be clicked in order to generate the report. This will also allow you to change the report options (e.g. change a department or year) and click “search” to generate the new results.

- Once a report is generated, you have the following options:
  - Print or Export to Excel us these buttons
  - Sort data by clicking on the report headings
  - View stipend details by clicking on the orange stipend number
  - Edit the number of records shown using the drop-box
**UNSIGNED CONTRACTS**

The Unsigned Contract report will help departments determine the clearance status of their students. It allows Approvers and Awarders to see, at a glance, all of the stipends for your department(s) that have not yet been accepted or denied by students.

**To run this report:**
1. Click on Awarder or Approver.
2. Under the Reports section, select Unsigned Contracts.

3. Select the appropriate Fiscal Year.
4. Select your department (or All to view all departments for which you have access).
5. Click Search.

**Results:**

The report will return all stipends that have been approved by the dean but are still pending student acceptance/denial. Keep in mind that **accepting a stipend is one of the criteria that must be met in order for a student to be cleared** to begin working, so any students that show up on this report cannot begin working.

In order to be cleared:
- Stipend must be accepted by the student
- On-boarding paperwork must be submitted
  - I-9
  - Direct Deposit
  - SSA
  - OPERs
- Background check must be completed (international students are exempt)
**Signed Contracts**

The Signed Contract report will help departments determine the clearance status of their students. It allows Approvers and Awarders to see, at a glance, all of the stipends for your department(s) that have been accepted by students.

**To run this report:**

1. Click on Awarder or Approver.
2. Under the Reports section, select Signed Contracts.
   
   ![Signed Contracts Report](image)

3. Select the appropriate Fiscal Year.
4. Select your department (or All to view all departments for which you have access).
5. Click Search.

**Results:**

The report will return all stipends that have been approved by the dean and the student. Keep in mind that accepting a stipend is **only one of the criteria that must be met in order for a student to be cleared** to begin working, so students that are on this report are not necessarily cleared to work. Please use the Cleared Students report to check for student clearance before allowing work to begin.
Cleared Students

The Cleared Students report will allow Approvers, Awarders and Reporters to see, at a glance, all of the stipends for your department(s) for which students have been cleared to work.

To run this report:

1. Click on Awarder, Approver, or Reporter.
2. Under the Reports section, select Signed Contracts.
3. Select the appropriate Fiscal Year.
4. Select your department (or All to view all departments for which you have access).
5. Click Search.

Results:
The report will return all stipends that have been approved by both the dean and the student, for which we have all of the on-boarding paperwork and a completed background check. All three of these criteria must be met in order for a student to be cleared to work.

Students are only cleared to work for the stipends listed on this report. For example, a student may be cleared for their summer stipend but NOT cleared for their AY stipend (because they have yet to accept it). Please check this report very carefully to make sure that your student is cleared for the appropriate work term before allowing them to begin work.
**NOT CLEARED STUDENTS**

The Not Cleared Students report will help departments determine the clearance status of their students. It allows Approvers and Awarders to see, at a glance, all of the stipends for your department(s) for which students have not been cleared to work.

**To run this report:**

1. Click on Awarder, Approver or Reporter.
2. Under the Reports section, select Signed Contracts.
3. Select the appropriate Fiscal Year.
4. Select your department (or All to view all departments for which you have access).
5. Click Search.

**Results:**

The report will return any stipends that have been approved by the dean but are missing at least one of the criteria in order to be cleared to work. In order to be cleared:

- Stipend must be accepted by the student
- On-boarding paperwork must be submitted
  - I-9
  - Direct Deposit
  - SSA
  - OPERs
- Background check must be completed

The report will show which of these criteria are not being met. For example:

#8011 still needs to be accepted by the student (Student Signature Date is blank).
#8014 and #8021 are pending the On-Boarding paperwork from the student (I-9, SSA and OPERs are N).
**NEW STUDENTS**

The New Students report will help departments determine which of their students are on a first-time assistantship. Keep in mind that this report uses the “Years of Funding” fields in the stipend request to determine if this is a student’s first assistantship, so errors in that data may cause incorrect results on this report.

**To run this report:**
1. Click on Awarder, Approver, or Reporter.
2. Under the Reports section, select New Students.
3. Select the appropriate Fiscal Year.
4. Select your department (or All to view all departments for which you have access).
5. Click Search.

**Results:**
The report will return any first-time assistantships. Generally, these are the students that will need to attend Graduate Student Orientation and fill out their On-Boarding paperwork before they can be cleared to begin work.
Scholarship Budget Report

The scholarship budget report will give departments an overview of the scholarship funding in their department.

To run this report:

1. Click on Awarder, Approver or Reporter.
3. Select the appropriate Fiscal Year.
4. Select your department (or All to view all departments for which you have access).
5. Click Search.

Results:
The report will return all funds associated with the selected department(s). Each type is labeled in the “Budget Type” column, with the total allowed, overage (if applicable), allocated amount and remaining budget. You can click on the orange FY App ID* to see more details about which scholarships are charged to this budget.

The available Budget Types you might see are:

- Scholarships – Graduate Operations funds spent in the department in which they have been allocated.
- External – IN – Non-Graduate Operation funds the selected department has been granted access to spend.
- External – OUT - Non-Graduate Operation funds from the selected department that another department has been granted access to spend.
- Shared GO Funds – IN – Graduate Operations funds from another department that the selected department has been granted access to spend.
- Shared GO Funds – OUT – Graduate Operations funds from the selected department that another department has been granted access to spend.
- Grant – funds from a grant that the selected department has been granted access to spend.

*Note that the FY App ID is a number that the webapp assigns to each budget upon creation.
Scholarships Awarded by Budget Report

The Scholarships Awarded by Budget Report will give departments a more detailed overview of the scholarship funding in their department.

To run this report:

1. Click on Awarder or Approver.
2. Under the Reports section, select Scholarships Awarded by Budget Report.

3. Select the appropriate Fiscal Year.
4. Select your department (or All to view all departments for which you have access).
5. Select the Budget Type you would like to review (Grad Ops, Shared, External, or Grant).
6. Select the item type for the budget you would like to review. Note that while each budget may have more than one item type, selecting any one of the item types will return results for all of them.
7. Click Search.

Results:
The report will return all scholarships that are currently using the selected budget. You can view details of the scholarship by selecting the Scholarship ID number.
**STIPEND BUDGET REPORT**

The stipend budget report will give departments an overview of the stipend funding in their department.

**To run this report:**
1. Click on Awarder, Approver or Reporter.

3. Select the appropriate Fiscal Year.
4. Select your department (or All to view all departments for which you have access).
5. Click Search.

**Results:**
The report will return all funds associated with the selected department(s). Each type is labeled in the “Budget Type” column, with the total allowed, allocated amount and remaining budget. You can click on the orange FY App ID* to see more details about which stipends are charged to this budget.

<table>
<thead>
<tr>
<th>FY App Id</th>
<th>Combo Code</th>
<th>Department</th>
<th>Budget Type</th>
<th>Amount</th>
<th>Overage</th>
<th>Allocated</th>
<th>Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>1931</td>
<td>114100OP</td>
<td>Accounting &amp; MIS</td>
<td>Stipend</td>
<td>$193,500.00</td>
<td>$19,350.00</td>
<td>$4,050.00</td>
<td>$208,800.00</td>
</tr>
<tr>
<td>22990</td>
<td>114100OP</td>
<td>Food and Nutrition</td>
<td>External - OUT</td>
<td>$10,000.00</td>
<td>$0.00</td>
<td>$8,000.00</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>22991</td>
<td>114100OP</td>
<td>Food and Nutrition</td>
<td>Shared GO Funds - OUT</td>
<td>$10,000.00</td>
<td>$0.00</td>
<td>$10,000.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

The available Budget Types you might see are:
- Stipends – Graduate Operations funds spent in the department in which they have been allocated.
- External – IN – Non- Graduate Operation funds the selected department has been granted access to spend.
- External – OUT - Non- Graduate Operation funds from the selected department that another department has been granted access to spend.
- Shared GO Funds – IN – Graduate Operations funds from another department that the selected department has been granted access to spend.
- Shared GO Funds – OUT – Graduate Operations funds from the selected department that another department has been granted access to spend.
- Grant – funds from a grant that the selected department has been granted access to spend.

*Note that the FY App ID is a number that the webapp assigns to each budget upon creation.
**Stipends Awarded by Budget Report**

The Stipends Awarded by Budget Report will give departments a more detailed overview of the stipend funding in their department.

**To run this report:**
1. Click on Awarde or Approver.
2. Under the Reports section, select Stipends Awarded by Budget Report.

3. Select the appropriate Fiscal Year.
4. Select your department (or All to view all departments for which you have access).
5. Select the Budget Type you would like to review (Grad Ops, Shared, External, or Grant).
6. Select the budget you would like to review.
7. Click Search.

**Results:**
The report will return all stipends that are currently using the selected budget. You can view details of the stipend by selecting the Stipend ID number.
STIPENDS MODIFIED REPORT
The stipends modified report will allow users to view all stipends that have been modified for a given fiscal year.

To run this report:
1. Click on Awarder or Approver.
2. Under the Reports section, select Stipends Modified Report.
3. Select the appropriate Fiscal Year.
4. Select your department (or All to view all departments for which you have access).
5. Click Search.

Results:
The report will return all stipends that have been modified in the chosen fiscal year, along with their old and new stipend numbers. You can view details of either stipend by selecting the Stipend ID number.
**STIPENDS CANCELLED REPORT**

The stipends cancelled report will allow users to view all stipends that have been cancelled for a given fiscal year.

**To run this report:**

1. Click on Awarder or Approver.
3. Select the appropriate Fiscal Year.
4. Select your department (or All to view all departments for which you have access).
5. Click Search.

**Results:**

The report will return all stipends that have been cancelled in the chosen fiscal year. You can view details of any stipend by selecting the Stipend ID number.
**STIPENDS TERMINATED REPORT**

The stipends terminated report will allow users to view all stipends that have been terminated for a given fiscal year.

**To run this report:**
1. Click on Awarder or Approver.
3. Select the appropriate Fiscal Year.
4. Select your department (or All to view all departments for which you have access).
5. Click Search.

**Results:**
The report will return all stipends that have been terminated in the chosen fiscal year. You can view details of any stipend by selecting the Stipend ID number.