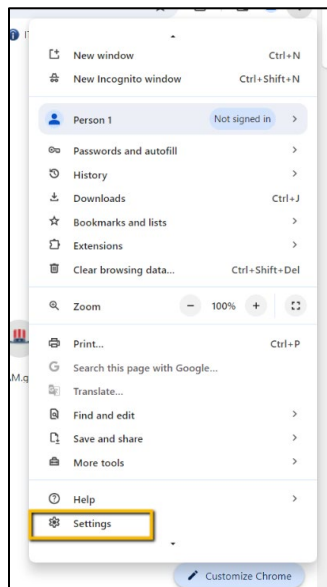


## Pre-Defined Report for Sponsored Projects and Award Tracking Modules

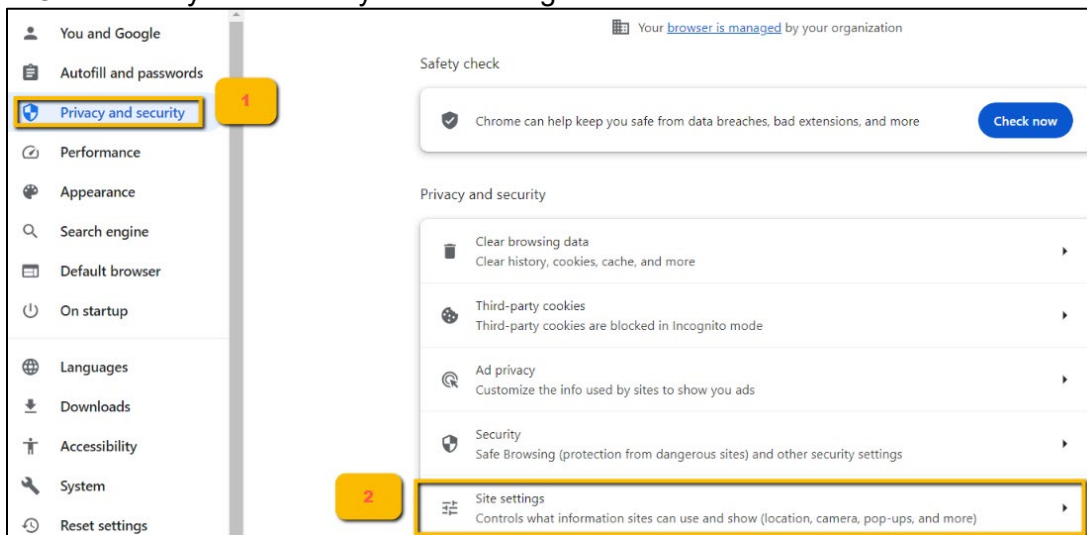
**Allowing Popups:** Some Pre-defined reports require that pop-ups from GeauxGrants be enabled in your desired browser.

### Chrome:

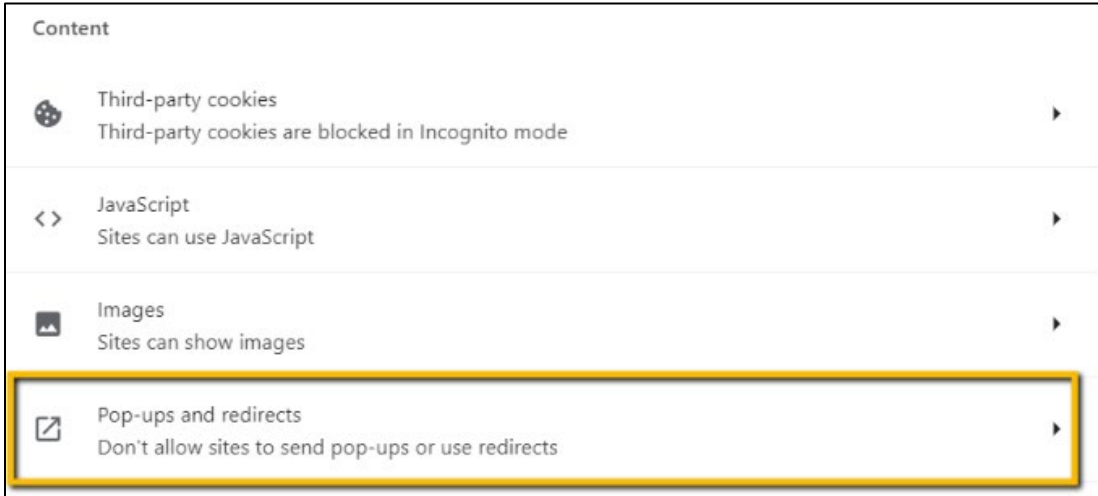
- Click the ellipsis (three vertical dots) in the upper right of a main browser window and click Settings.



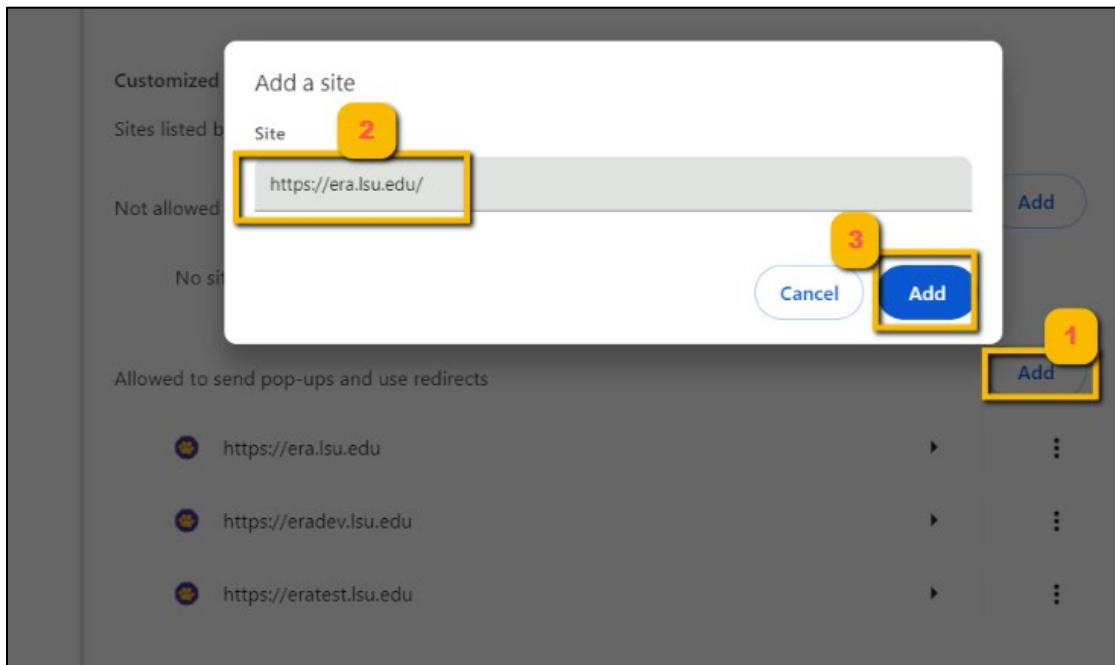
- Click Privacy and Security > Site Settings



- Click Pop-ups and redirects

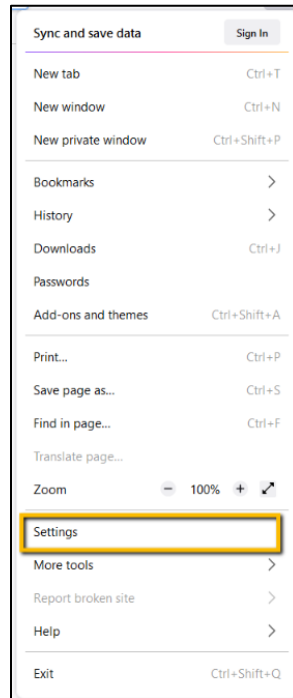


- Under "Allowed to send pop-ups and use redirects," click Add. Type in <https://era.lsu.edu> and click Add.

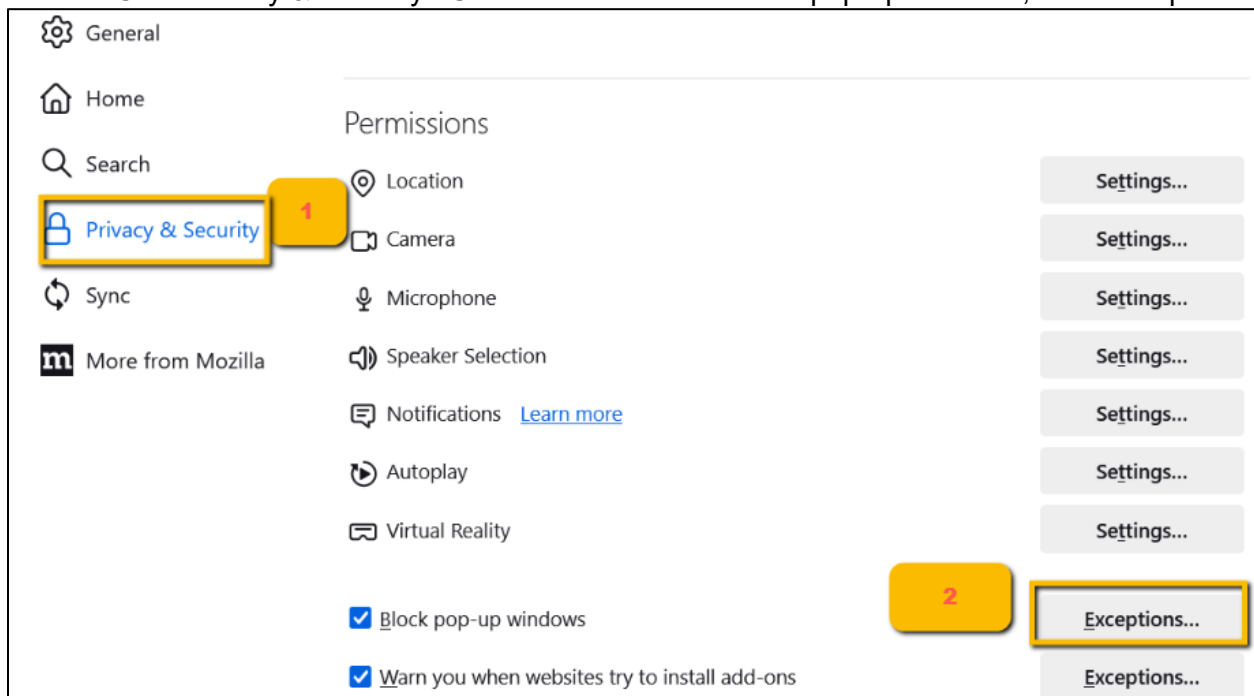


**Firefox:**

- Click the three horizontal lines in the upper right of a main browser window and click Settings.



- Click Privacy & Security. Under Permissions > Block pop-up windows, click Exceptions.

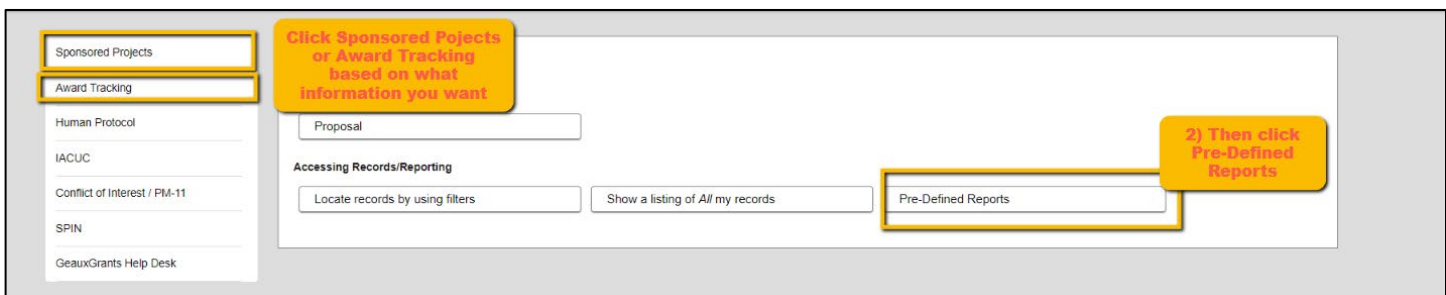


- Enter <https://era.lsu.edu> and click Allow and then Save Changes.



## How to Access Pre-Defined Reports:

To access the reports, Click Sponsored Projects or Award Tracking then click Pre-Defined reports. If you have a suggestion for a new report to be created, please email [osp@lsu.edu](mailto:osp@lsu.edu).



## What does each report Do?

- Our reports are categorized by Sponsored Projects Module Reports and Award Tracking Reports. Each report is outlined below.
- **IMPORTANT:** Output of reports is based on your current security role in GeauxGrants.

## Sponsored Projects Module Pre-Defined Reports

### Standard Reports

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#### Institutional Reports

- [Current & Pending Support - Awards by Investigator](#)
- [Current & Pending Support - Proposals by Investigator](#)
- [Gold Team Proposal Specialist Assignments](#)
- [Mod Requests pending SPA Approval](#)
- [Overall Proposals Routing](#)
- [Overall Subaward Specialist](#)
- [Purple Team Proposal Specialist Assignments](#)
- [Subaward Institution Search \(enter subrecipient name\)](#)
- [Subawards in Process](#)
- [Subawards Issued FY22](#)
- [Subawards Issued FY23](#)
- [Subawards Issued FY24](#)
- [Workday Award Number Lookup](#)
- [Workday Grant ID Lookup](#)

- Current & Pending Support - Awards by Investigator** – Allows users to search for Active Awards by Investigator. You will be prompted to look up the investigator’s name. The report does not include effort. You will need to review proposed effort on the Proposal Development Budget tab and budget justification along with any sponsor approved effort reductions to determine effort to report.

**Current & Pending Support - Awards by Investigator** Optional 5) Run Report Close

Include Title

Include Date/Time

**Query Criteria**      **Condition**      **Value**

Investigator - Name (PT Awarded)      = >      Lookup 1)

---

Select value - Google Chrome

eradev.lsu.edu/PopUpSelectProg.asp?Parameter=PersonWithDept&System=PT&ReturnFunc=ProgTextPopupPersonnelF...

2) Enter last name first in the progressive text field pop-up

4) Select Close

3) Select the correct profile

- [Tiger, \(L12\) Mike the -- LSUAM | Sch of VETM | Comparative Biomedical Science | CC00296](#)
- [Tiger, \(L16\) Mike the -- LSUAM | ORED | LA Sea Grant Omnibus Award | CC00310](#)
- [Tiger, \(L17\) Mike the -- LSUAM | Sch of VETM | Pathobiological Sciences | CC00293](#)
- [Tiger, \(L17\) Mike the -- LSUAM | Sch of VETM | Veterinary Clinical Sciences | CC00290](#)
- [Tiger, \(L20\) Mike the -- LSUAM | Sch of VETM | Pathobiological Sciences | CC00293](#)
- [Tiger, \(L20\) Mike the -- LSUAM | Col of SCI | Chemistry | CC00145](#)
- [Herrington, Rachel - 897197725 - LSUAM | AS | Tiger Card Office | CC00593](#)

- Current & Pending Support - Proposals by Investigator** – Allows users to search for Proposals in Submitted status by Investigator. You will be prompted to look up the investigator’s name. The report does not include the proposed effort. You will need to review proposed effort on the Proposal Development Budget tab and budget justification to determine effort to report.

**Current & Pending Support - Proposals by Investigator** Optional 5) Run Report Close

Include Title

Include Date/Time

**Query Criteria**      **Condition**      **Value**

Investigator - Name (PT Requested)      = >      Lookup 1)

---

Select value - Google Chrome

eradev.lsu.edu/PopUpSelectProg.asp?Parameter=PersonWithDept&System=PT&ReturnFunc=ProgTextPopupPersonnelF...

2) Enter last name first in the progressive text field popup

4) Select Close

3) Select the correct profile

- [Tiger, \(L12\) Mike the -- LSUAM | Sch of VETM | Comparative Biomedical Science | CC00296](#)
- [Tiger, \(L16\) Mike the -- LSUAM | ORED | LA Sea Grant Omnibus Award | CC00310](#)
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- [Tiger, \(L20\) Mike the -- LSUAM | Col of SCI | Chemistry | CC00145](#)
- [Herrington, Rachel - 897197725 - LSUAM | AS | Tiger Card Office | CC00593](#)

- **Gold Team Proposal Specialist Assignments** - Shows all the proposals currently in Routing or Routing Approvals Received status that are currently assigned to a Gold Team OSP Specialist for review. We recommend departments/colleges utilize the Overall Proposals Routing report since OSP may assign proposals across teams.
- **Mod Requests Pending SPA Approval** – Shows modification/prior approval requests currently in Routing or Routing Approvals Received that are under review by Sponsored Program Accounting.
- **Overall Proposals Routing** - Shows all the proposals currently in Routing or Routing Approvals Received status that are assigned to an OSP Specialist for review. We recommend departments/colleges utilize this report since OSP may assign proposals across teams.
- **Overall Subaward Specialist** – Shows all Subawards agreements and amendments that are currently being drafted or negotiated by an OSP specialist.
- **Purple Team Proposal Specialist Assignments** - Shows all the proposals currently in Routing or Routing Approvals Received status that are currently assigned to a Purple Team OSP Specialist for review. We recommend departments/colleges utilize the Overall Proposals Routing report since OSP may assign proposals across teams.
- **Subaward Institution Search (enter subrecipient name)** – Allows users to search by subawards issued to a specific Subrecipient Institution. This report contains a prompt where you will enter the subrecipient name and hit the run report button at the top right. You can also add a title and include the date and time.

The screenshot shows the 'Subaward Institution Search (enter subrecipient name)' form. At the top right, there is a 'Run Report' button (labeled '2') and a 'Close' button. Below the title, there are two checkboxes: 'Include Title' (checked) and 'Include Date/Time' (unchecked). A yellow box labeled 'Optional' has arrows pointing to both checkboxes. Below these is a table for query criteria:

Query Criteria	Condition	Value
Agreement Institution Name	Contains	Tulane

A yellow box labeled '1' points to the 'Value' input field containing 'Tulane'.

- **Subawards in Process** – Shows all the Subaward agreements and amendments that are in process and the status for the subaward agreement or amendment. See [Subawards Overview](#) for a description of subaward statuses.
- **Subawards Issued FY22** – Shows all Subaward agreements and amendments that were fully-executed July 1, 2021, through June 30, 2022.
- **Subawards Issued FY23** – Shows all Subaward agreements and amendments that were fully-executed July 1, 2022, through June 30, 2023.
- **Subawards Issued FY24** – Shows all Subaward agreements and amendments that were fully-executed July 1, 2023, through June 30, 2024.

- **Workday Award Number Lookup** – Allows you to enter a Workday Award Number to find the associated GeauxGrants Record Number.

The screenshot shows the 'Workday Award Number Lookup' form. At the top right, there is a 'Run Report' button (labeled '2') and a 'Close' button. Below the title, there are two optional checkboxes: 'Include Title' and 'Include Date/Time', both highlighted with yellow boxes and arrows pointing to an 'Optional' label. The 'Query Criteria' section shows 'Current Workday Project Data - Workday Award Number' with a dropdown menu set to '='. The 'Value' field contains 'AWD-000001' (labeled '1'). A yellow callout box on the right says 'Enter workday AWD number with AWD-'. At the bottom right, there is a 'Run Report' button (labeled '2') and a 'Close' button.

- **Workday Grant ID Lookup** – Allows you to enter a Workday Grant Line Number to find the associated GeauxGrants Record Number.

The screenshot shows the 'Workday Grant ID Lookup' form. At the top right, there is a 'Run Report' button (labeled '2') and a 'Close' button. Below the title, there are two optional checkboxes: 'Include Title' and 'Include Date/Time', both highlighted with yellow boxes and arrows pointing to an 'Optional' label. The 'Query Criteria' section shows 'Current Workday Project Data - Workday Grant ID' with a dropdown menu set to '='. The 'Value' field is empty (labeled '1'). A yellow callout box on the right says 'Enter Workday Grant ID with GR- prefix'. At the bottom right, there is a 'Run Report' button (labeled '2') and a 'Close' button.

## Award tracking Pre-Defined Reports

The screenshot shows a list of 'Standard Reports' under the heading 'Award tracking Pre-Defined Reports'. The reports listed are:

- [Awards under Review](#)
- [Fully Executed Sent to SPA in Last Month](#)
- [Fully Executed Sent to SPA in Last Week](#)
- [Gold Team Award Specialist Assignment](#)
- [Overall OSP Award Specialist Assignment](#)
- [Purple Team Award Specialist Assignment](#)



- **Awards under Review** – Shows all the Award Increments that are in process and the status for the award increment. See [Award Overview](#) for a description of award increment statuses.
- **Fully Executed sent to SPA in the Last Month** – Shows all Award Increments that have been Fully Executed Sent to SPA in the last month based on your security.
- **Fully Executed sent to SPA in the Last Week** – Shows all Award Increments that have been Fully Executed Sent to SPA in the last week based on your security.
- **Gold Team Award Specialist Assignment** – Shows all Award Increments that are currently being reviewed by a Gold Team OSP Specialist or waiting on compliance approvals. We recommend departments/colleges utilize the Overall OSP Award Specialist Assignment report since OSP may assign award increments across teams.
- **Overall OSP Award Specialist Assignment** - Shows all Award Increments that are currently being reviewed by an OSP Specialist or waiting on compliance approvals. We recommend departments/colleges utilize this report since OSP may assign award increments across teams.
- **Purple Team Award Specialist Assignment** – Shows all Award Increments that are currently being reviewed by a Purple Team OSP Specialist or waiting on compliance approvals. We recommend departments/colleges utilize the Overall OSP Award Specialist Assignment report since OSP may assign award increments across teams.

## Exporting Reports to Excel

All reports can be exported to excel. After running the report, click on Export to Excel in top right corner.

