

## **UF Award Report Methodology**

### **How do we allocate funds into Colleges and Departments?**

Award and modification dollars are grouped by the Project Responsible Unit. This is consistent with historical (pre-UFIRST) methodology.

### **What dollars do not count?**

Certain transaction types are not counted in the University of Florida Office of Research award reporting. This is consistent with historical methodology. These transaction types include:

- Any allocation currently in Temporary (Sponsor Authorized funds not received, but budget has been released) status.
- Any allocation marked "Not Authorized for Spending".
- Any modification done for the purpose of Carryover.
- Any modification which rebudgets categories within an existing project.
- Any Core Office Corrections modification.
- Any awards or modifications where the Sponsor is categorized as Internal Sponsors (UF, UFRF sponsor types).

All data including transactions such as above are included in the data underlying the reports available via Enterprise Reporting but are by default excluded. By selecting the appropriate prompts you can include these transactions for your local reporting needs.

### **What date do we use to allocate funds into months, quarters, or years?**

The University of Florida Annual Report divides award dollars into months and quarters using the *Funds Activated Date*. This is the date that the award or incremental modification made it all the way through the DSP and C&G set-up process and funds are available for spending.

Prior to UFIRST, the data used to allocate funds was the Sponsor Award Date. Please note this field was not used consistently and interpretation varied.

### **How do I access UF Award reports?**

UFIRST reports are available via Enterprise Reporting. To run these reports you must have the **UF\_FI\_UNIVERSAL\_INQUIRY** role.

### **The UF Award Funding report**

This report is a 10-year history of all award transactions. It is similar to the Awards spreadsheet that used to be found on the Office of Research website. This is the report that the Office of Research uses to produce the quarterly and annual view of all sponsored projects dollars at the University of Florida. It lists sponsor authorized dollars for all awards received on or after 7/1/2007, including cash (Fund 214) awards. The report includes funding amounts at the award, project and allocation level. This report can be filtered by department (project responsible unit), date, award PI, project manager or sponsor.

To run this report, perform the following steps:

1. Log into myUFL using your Gatorlink ID and password.

2. Navigate to **Main Menu > Enterprise Reporting > Access Reporting > Sponsored Program Information > UFIRST > UFIRST Awards > UF Award Funding**.

*Tip: Most UFIRST Reports are available in two formats: PDF or Excel export.*

3. Select a report. The ten year transactional report is **UF Award Funding**.
4. On the report options page, select the required and/or optional prompts for the data you want to view.
5. Click the **Finish** button. The report displays in the selected format.
6. Other available reports in this folder are:
  - Awards by Project Responsible Unit (by Calendar Year & Month)
  - Awards by Project Responsible Unit (by Fiscal Month)
  - Awards by Project Responsible Unit (by Fiscal Quarter)
  - Awards by Project Responsible Unit (by Fiscal Year)
  - Awards by Reporting Sponsor Category (by Fiscal Year & Month)
  - Awards by Reporting Sponsor Category Rollup (by Fiscal Year & Month)
7. For additional reports, navigate back to **Main Menu > Enterprise Reporting > Access Reporting > Sponsored Program Information > UFIRST > UFIRST Awards**.
8. Select a report. The following reports are available. **Note:** These reports will soon be migrated to the **UF Award Funding** folder.
  - **UFIRST Awards** – provides a listing of the full award portfolio of a department, award PI or sponsor and its current overall state.
  - **UFIRST Projects** – provides a report of all awards and related projects for a specified department, award PI, project manager or sponsor.
  - **UFIRST Financial Award Transactions** – provides a report of sponsor authorized dollars for all awards received on or after 7/1/2016, including cash (fund 214) awards. The report includes funding amounts at the award, project and allocation level. This report can be filtered by department, date, award PI, project manager or sponsor. **Note:** This report will be phased out as the greater 10-year view replaces it.

A report data dictionary is available for assistance in understanding the data elements included in the report. <http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits/grants/>

A comprehensive data dictionary for UFIRST is available at: <http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits/grants/>

If you have issues accessing the reports, please contact the UF Computing Help Desk (392-HELP). For questions about UFIRST data or to provide UFIRST reporting suggestions, please contact [Lisa Stroud](#) in the UF Office of Research.

**Helpful Hints:**

The 'Type' field was often used in historical datasets for Departments to determine what funds were "New" and what funds were modifications to existing awards. That data element can be found in Column AW: Type of Allocation. A note on History: this data element was never accurately defined and interpretation varied.

- Awards\_Baseline: New Awards with no Modifications
- Mods\_Award\_Baseline: Treat as a New Award. This is the new award original value, but it has since been modified. Mods\_Award\_Baseline maintains that original award value.
- Mods\_Adjustments: Reportable Financial Mods (excluding carryover, temporary, marked not authorized for spending, core office corrections). Comparing to prior methodology, this is everything not marked New in prior reporting sources.
- PS\_214\_Deposits: For Fund 214 projects, the dollars are pulled in right from the Deposit log. Modifications are not done in UFIRST for these checks.
- New-SRM: The Type of this allocation was marked as 'New' in the Historical System.
- Supplemental-SRM: The Type of this allocation was marked as 'Supplemental' in the Historical System.
- Temp-SRM: The Type of this allocation was marked as 'Temporary' in the Historical System.
- Carry Over-SRM: The Type of this allocation was marked as 'Carryover' in the Historical System.
- Decrease-SRM: The Type of this allocation was marked as 'Decrease' in the Historical System.
- Renewal-SRM: The Type of this allocation was marked as 'Renewal' in the Historical System.
- Continuation-SRM: The Type of this allocation was marked as 'Continuation' in the Historical System.
- Extension-SRM: The Type of this allocation was marked as 'Extension' in the Historical System.

Award transactional data since July 1, 2017 includes rows for all allocations associated with that Award, regardless of if they received an increment of funding with that modification. If there are no funds associated with that allocation in that Modification, those rows will return as \$0 in the Sponsor Authorized column.

## Running UFIRST Reports

UFIRST reports are available via Enterprise Reporting. To run these reports, you must have the **UF\_FI\_UNIVERSAL\_INQUIRY** role.

To run a UFIRST report, perform the following steps:

1. Log into myUFL using your Gatorlink ID and password.
2. Navigate to **Main Menu > Enterprise Reporting > Access Reporting > Sponsored Research Information > UFIRST**.

***Tip: UFIRST Reports are available in two formats: PDF or Excel export.***

3. Select a report definition. The following reports are available:
  - All Activity by Personnel – provides a listing of all proposal activity by a specified individual or individuals.
  - All Proposals Role Activity by Home Department – provides a report of all proposal activity by a specified Department.
  - Submitted Proposals Activity Report – provides a listing of each proposal by submitting department or by PI.
4. On the report options page, select the required and/or optional prompts for the data you want to view.
5. Click the **Finish** button. The report displays in the selected format.

## Building Custom UFIRST Reports

Raw UFIRST data is available in the **UFIRST Data** folder. You can export the data to Excel and build reports tailored to your specific needs. (For best results, view in Excel 2007 format and Save As a new file on your personal computer).

Raw UFIRST data is also available via Query Studio. You can build queries and reports as needed. To access Query Studio, you must have the **UF\_ER\_Query\_Studio** security role.

A Data Dictionary is available for assistance in understanding the data elements included in the raw data. <http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits/grants/>

Additional background information is available:

- Guides for Enterprise Reporting Basics – <http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits/enterprise-reporting-basics/>
- General information about Enterprise Reporting – <http://www.it.ufl.edu/myufl/reporting/>

If you have issues accessing the reports, please contact the UF Computing Help Desk (392-HELP). For questions about UFIRST data or to provide UFIRST reporting suggestions, please contact [Lisa Stroud](#) in the UF Office of Research.

## Award History Report

Field Name	Report Field Name	UFIRST Location	Description	Original Data Source
**FIELD NAMES LIMITED TO 30 CHARACTERS**				
CLK_AWD_PROJ_ID	Project ID	Awards: P 5.1 Q 1.0	myUFL Project ID	myUFL
EXCEPTION	Exception Code	Derived Field	Reason for Exclusion from Institutional Reporting	Derived Field
UNIVERSITY_REPORTABLE	Reportable Allocation	Derived Field	The Allocation is Institutionally Reportable and is included in all Award Reports.	Derived Field
FUNDS_ACTIVATED	Fund Activated Date	Awards: Activity Details, History Log	Date the Allocation became activated in myUFL. This is the date that is used to 'count' the dollars for institutional reporting.	UFIRST
REPORTING_SPONSOR_NAME	Reporting Sponsor Name	Derived Field	Sponsor used in institutional reporting. If Primary Sponsor is Null, this is Direct Sponsor.	Derived Field
CLK_AWD_PROJ_MGR	Project Manager	Awards: P 5.1 Q 1.0 "Define Project" PopUp Q	Project Manager Name	myUFL: Name comes from UF Business Name (Source: HR.Registry. This name matches
CLK_AWD_RESP_UNIT	Project Responsible Unit	Awards: P 5.1 Q 1.0 "Define Project" PopUp Q	Responsible Unit Name	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
CLK_AWD_RESP_UNIT_DEPTID	Project Responsible Unit DeptID	Awards: P 5.1 Q 1.0 "Define Project" PopUp Q	Responsible Unit DeptID	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
DIRECT_AMOUNT	Direct Amount	Awards: P 5.2 Q 1.0 "Allocation Setup" PopUp	Sponsor Authorized Amount, Direct Dollars, for this Allocation	UFIRST
INDIRECT_AMOUNT	Indirect Amount	Awards: P 5.2 Q 1.0 "Allocation Setup" PopUp	Sponsor Authorized Amount, Indirect Dollars, for this Allocation	UFIRST
SPONSOR_AUTHORIZED_AMOUNT	Total Sponsor Authorized Amount	Awards: P 5.2 Q 1.0 "Allocation Setup" PopUp	Sponsor Authorized Amount, Total Dollars, for this Allocation	UFIRST
REPORTING_SPONSOR_CAT	Reporting Sponsor Category	Derived Field	Sponsor used in institutional reporting Category. If Primary Sponsor is Null, this is Direct Sponsor Category.	Derived Field
CLK_AWD_SPONSOR_NAME	Direct Sponsor Name	Awards: P 1.0 Q 6.0a	Direct Sponsor Name	myUFL: FIPRD9/PS_CUSTOMER TABLE (Select NAME1 where SETID="GRANT")
CLK_AWD_SPONSOR_CAT	Direct Sponsor Category	Not Visible at Entry	Direct Sponsor Category	myUFL: FIPRD9/PS_CUSTOMER TABLE/SPNSR_TYPE
CLK_AWD_PRIME_SPONSOR_NAME	Prime Sponsor Name	Awards: P 1.0 Q 7.0a	Primary or Flowthrough Sponsor Name	myUFL: FIPRD9/PS_CUSTOMER TABLE (Select NAME1 where SETID="GRANT")
CLK_AWD_PRIME_SPONSOR_CAT	Prime Sponsor Category	Not Visible at Entry	Primary or Flowthrough Sponsor Category	myUFL: FIPRD9/PS_CUSTOMER TABLE/SPNSR_TYPE
CLK_AWD_SPONSOR_AWD_ID	Direct Sponsor Award ID	Awards: P 1.0 Q 6.0b	Direct Sponsor Award ID	UFIRST
CLK_AWD_PRIME_SPONSOR_AWD_ID	Prime Sponsor Award ID	Awards: P 1.0 Q 7.0b	Primary or Flowthrough Sponsor Award ID	UFIRST
CLK_AWD_PROJ_COLLEGE	Project College	Not Visible at Entry	Responsible College Name	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
Available in Model Only	Project College Short Name	Not Visible at Entry	Responsible College Short Name	Office of Research Abbreviation
FY_DATE_ACTIVATED	Fiscal Year	Derived Field	Fiscal Year Activated	Derived Field
FQ_DATE_ACTIVATED	Fiscal Quarter	Derived Field	Fiscal Quarter Activated	Derived Field
FM_DATE_ACTIVATED	Fiscal Month	Derived Field	Fiscal Month Activated	Derived Field
MONTH_DATE_ACTIVATED	Calendar Month	Derived Field	Calendar Month Activated	Derived Field
CLK_AWD_PROJ_MGR_DEPT	Project Manager Home Department	Not Visible at Entry	Project Manager Home Department Name	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
CLK_AWD_PROJ_MGR_DEPTID	Project Manager Home DeptID	Not Visible at Entry	Project Manager Home Department DeptID	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
CLK_AWD_PROJ_MGR_COLLEGE	Project Manager College	Not Visible at Entry	Project Manager College Name	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
REPORTING_SPONSOR_CUSTID	Reporting Sponsor CustID	Derived Field	Sponsor used in institutional reporting myUFL Customer ID. If Primary Sponsor is Null, this is Direct Sponsor Customer ID.	Derived Field
REPORTING_SPONSOR_AWD_ID	Reporting Sponsor Award ID	Derived Field	Sponsor used in institutional reporting AwardID. If Primary Sponsor is Null, this is Direct Sponsor AwardID.	Derived Field
Available in Model Only	Reporting Sponsor Type	Derived Field	Sponsor used in institutional reporting Category Type. If Primary Sponsor is Null, this is Direct Sponsor Category Type.	Office of Research Abbreviation
CLK_AWD_SPONSOR_CUSTID	Direct Sponsor CustID	Not Visible at Entry	Direct Sponsor CustID	myUFL: FIPRD9/PS_CUSTOMER TABLE (Select CUST_ID where SETID="GRANT")
Available in Model Only	Direct Sponsor Type	Derived Field	Direct Sponsor Category Type	Office of Research Abbreviation
CLK_AWD_PRIME_SPONSOR_CUSTID	Prime Sponsor CustID	Not Visible at Entry	Primary or Flowthrough Sponsor CustID	myUFL: FIPRD9/PS_CUSTOMER TABLE (Select CUST_ID where SETID="GRANT")
Available in Model Only	Prime Sponsor Type	Derived Field	Prime Sponsor Category Type	Office of Research Abbreviation
CLK_AWD_ID	Award ID	Award Workspace	Auto assigned UFIRST Award ID number	UFIRST
CLK_AWD_STATE	Award Current State	Award Workspace	The state the award is in when the query is executed.	UFIRST
CLK_AWD_DEPT	Award Department	Awards: P 1.0 Q 2.0	Award Responsible Department Name	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
CLK_AWD_COLLEGE	Award College	Not Visible at Entry	Award Responsible College Name	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
CLK_AWD_DEPTID	Award DeptID	Awards: P 1.0 Q 2.0	Award Responsible DepartmentID	myUFL: HRPRD9/PS_JOB table/DEPTID
Available in Model Only	Award College Short Name	Not Visible at Entry	Award Responsible College Short Name	Office of Research Abbreviation
Available in Model Only	Award Department Short Name	Not Visible at Entry	Award Responsible Department Short Name	Office of Research Abbreviation
CLK_AWD_PI	Award PI	Awards: P 1.0 Q 1.0a	Award Principal Investigator Name	myUFL: Name comes from UF Business Name (Source: HR.Registry. This name matches
CLK_AWD_PI_DEPT	Award PI Home Department	Not Visible at Entry	Award Principal Investigator Home Dept Description	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
CLK_AWD_PI_DEPTID	Award PI Home DeptID	Not Visible at Entry	Award Principal Investigator Home DeptID	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
CLK_AWD_PI_COLLEGE	Award PI Home College	Not Visible at Entry	Award Principal Investigator Home College Description	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
CLK_AWD_COST_SHARE	CostShare	Awards: P 1.0 Q 16.0	Does this award have voluntary or mandatory cost share?	UFIRST
CLK_AWD_LAB_ANMLS	Lab Animals	Awards: P 7.0 Q 1.0	Does this award have Lab Animals?	UFIRST
CLK_AWD_HUMAN_SUBJ	Human Subject	Awards: P 7.0 Q 1.0	Does this award have Human Subjects?	UFIRST
SRC	Type of Allocation	Derived Field	Source of Funds: Baseline Award or Subsequent Modification	Derived Field
ALLOCATION_ID	Allocation ID	Not Visible at Entry	Allocation ID	UFIRST
MOD_PAY_ID	Modification ID	Derived Field	Funds 201/209: Allocation ID; Fund 214: myUFL Project, Journal & Payment ID	Derived Field
CLK_AWD_ALLOC_IDC_RATE	Allocation Indirect Cost Rate %	Awards: P 5.1 Q 1.0 "Define Project" PopUp Q	Indirect Cost Rate	UFIRST Proposals
CLK_AWD_ALLOC_RATE_TYPE	Allocation Indirect Cost Rate Type	Awards: P 5.1 Q 1.0 "Define Project" PopUp Q	Indirect Cost Rate Type	UFIRST Proposals
CLK_AWD_ALLOC_RATE_BASE	Allocation Indirect Rate Base	Awards: P 5.1 Q 1.0 "Define Project" PopUp Q	Indirect Cost Base	UFIRST Proposals
CLK_AWD_PURPOSE	Purpose	Awards: P 5.1 Q 1.0 "Define Project" PopUp Q	Project Purpose	UFIRST
CLK_AWD_PROJ_TYPE	Project Type	Awards: P 5.1 Q 1.0 "Define Project" PopUp Q	Project Type	UFIRST
CLK_AWD_OVERALL_START_DATE	Award Overall Start Date	Awards: P 1.0 Q 11.0	Overall Start Date; First day of the award as identified in the funding document.	UFIRST
CLK_AWD_OVERALL_END_DATE	Award Overall End Date	Awards: P 1.0 Q 12.0	Overall End Date; Last day of the award as identified in the funding document.	UFIRST
CLK_AWD_PRJ_START_DT	Project Start Date	Awards: P 5.1 Q 1.0 "Define Project" PopUp Q	Earliest Allocation Start Date of the myUFL Project	UFIRST
CLK_AWD_PRJ_END_DT	Project End Date	Awards: P 5.1 Q 1.0 "Define Project" PopUp Q	Latest Allocation End Date of the myUFL Project	UFIRST
CLK_AWD_ALLOC_START_DT	Allocation Start Date	Awards: P 5.1 Q 1.0 "Define Project" PopUp Q	Allocation Start Date of the associated Allocation	UFIRST
CLK_AWD_ALLOC_END_DT	Allocation End Date	Awards: P 5.1 Q 1.0 "Define Project" PopUp Q	Allocation End Date of the associated Allocation	UFIRST
AWD_PI_PREAM	Award PI: Preeminent Faculty	Derived Field	The Award PI is identified as Preeminent Faculty by the Provost's Office.	Provost
PRJ_MGR_PREAM	Project Manager: Preeminent Faculty	Derived Field	The Project Manager is identified as Preeminent Faculty by the Provost's Office.	Provost
CLK_AWD_PS_FUND_CODE_ID	Fund Code	Awards: myUFL Integration PopUp Question 1	Project Fund Code	UFIRST
CLK_AWD_PROJ_ACTIVE	Project Active Today	Derived Field	Is today's date between the allocation start and end date?	Derived Field
CLK_AWD_PROJ_CLOSED	Project Closed	Award Workspace	Is the Project closed in myUFL?	UFIRST
CLK_AWD_PROJ_NAME	Project Name	Awards: P 5.1 Q 1.0 "Define Project" PopUp Q	myUFL Project Name	myUFL
CLK_AWD_FULL_TITLE	Award Full Title	Awards: P 1.0 Q 5.0	Full Title of Award	UFIRST

## UFIRST Financial Award Transactions Data Dictionary

Report Field Name	UFIRST Location	Description	Original Data Source
Project ID	Awards: P 5.1 Q 1.0	myUFL Project ID	myUFL
Project Name	Awards: P 5.1 Q 1.0 "Define Project" Popup Q	myUFL Project Name	myUFL
Project Manager	Awards: P 5.1 Q 1.0 "Define Project" Popup Q	Project Manager Name	myUFL: Name comes from UF Business Name (Source: HR.Registry. This name match
Project Manager UFID	Not Visible	Project Manager UFID	myUFL: HRPRD9/PS.JOB table/EMPLID
Project Manager Home Department	Not Visible	Personnel Home Dept Descr	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
Project Manager Home DeptID	Not Visible	Personnel Home DeptID	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
Project Responsible Unit	Awards: P 5.1 Q 1.0 "Define Project" Popup Q	Responsible Unit Name	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
Project Responsible Unit DeptID	Not Visible	Responsible Unit DeptID	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
Award ID	Award Workspace	Auto assigned UFIRST Award ID number	UFIRST
Award Current State	Award Workspace	The state the award is in when the query is executed.	UFIRST
Primary Investigator	Awards: P 1.0 Q 1.0a	Award Principal Investigator Name	myUFL: Name comes from UF Business Name (Source: HR.Registry. This name match
Primary Investigator UFID	Not Visible at Entry	Award Principal Investigator UFID	myUFL: HRPRD9/PS.JOB table/EMPLID
PI Home DeptID	Not Visible at Entry	Award Principal Investigator Home DeptID	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
PI Home Department	Not Visible at Entry	Award Principal Investigator Home Dept Description	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
PI College	Not Visible at Entry	Award Principal Investigator Home College Description	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
Award Department	Awards: P 1.0 Q 2.0	Award Responsible Dept Description from Award Smartform page 1.0	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
Award College	Not Visible at Entry	Award Responsible College Description	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
Award DeptID	Not Visible at Entry	Award Responsible DeptID from Award Smartform page 1.0	myUFL: HRPRD9/PS.JOB table/DEPTID
Award Primary Unit Contact	Awards: P 1.0 Q 3.0	Award Primary Unit Contact Name	myUFL: Name comes from UF Business Name (Source: HR.Registry. This name match
Award Primary Unit Contact UFID	Not Visible at Entry	Award Primary Unit Contact UFID	myUFL: HRPRD9/PS.JOB table/EMPLID
Sponsor Name	Awards: P 1.0 Q 6.0a	Direct Sponsor Name	myUFL: FIPRD9/PS_CUSTOMER TABLE (Select NAME1 where SETID='GRANT')
Sponsor CustID	Not Visible at Entry	Direct Sponsor CustID	myUFL: FIPRD9/PS_CUSTOMER TABLE (Select CUST_ID where SETID='GRANT')
Sponsor Award ID	Awards: P 1.0 Q 6.0b	Direct Sponsor Award ID	UFIRST
Sponsor Category	Not Visible at Entry	Direct Sponsor Category	myUFL: FIPRD9/PS_CUSTOMER TABLE/SPNSR_TYPE
Prime Sponsor Name	Awards: P 1.0 Q 7.0a	Primary or Flowthrough Sponsor Name	myUFL: FIPRD9/PS_CUSTOMER TABLE (Select NAME1 where SETID='GRANT')
Prime Sponsor CustID	Not Visible at Entry	Primary or Flowthrough Sponsor CustID	myUFL: FIPRD9/PS_CUSTOMER TABLE (Select CUST_ID where SETID='GRANT')
Prime Sponsor Category	Not Visible at Entry	Primary or Flowthrough Sponsor Category	myUFL: FIPRD9/PS_CUSTOMER TABLE/SPNSR_TYPE
Prime Sponsor Award ID	Awards: P 1.0 Q 7.0b	Primary or Flowthrough Sponsor Award ID	UFIRST
Reporting Sponsor Name	Derived Field	Sponsor used in institutional reporting. If Primary Sponsor is Null, this is Direct Sponsor.	Derived Field
Reporting Sponsor CustID	Derived Field	Sponsor used in institutional reporting myUFL Customer ID. If Primary Sponsor is Null, this is Direct Sponsor.	Derived Field
Reporting Sponsor Category	Derived Field	Sponsor used in institutional reporting Category. If Primary Sponsor is Null, this is Direct Sponsor.	Derived Field
Reporting Sponsor Award ID	Derived Field	Sponsor used in institutional reporting AwardID. If Primary Sponsor is Null, this is Direct Sponsor.	Derived Field
Award Overall Start Date	Awards: P 1.0 Q 11.0	Overall Start Date; First day of the award as identified in the funding document.	UFIRST
Award Overall End Date	Awards: P 1.0 Q 12.0	Overall End Date; Last day of the award as identified in the funding document.	UFIRST
CostShare	Awards: P 1.0 Q 14.0	Does this award have voluntary or mandatory cost share?	UFIRST
Human Subject	Awards: P 7.0 Q 1.0	Does this award have Human Subjects?	UFIRST
Lab Animals	Awards: P 7.0 Q 1.0	Does this award have Lab Animals?	UFIRST
Allocation Indirect Cost Rate %	Awards: P 5.2 Q 1.0 Popup Q 11.0	Indirect Cost Rate	UFIRST Proposals
Allocation Indirect Cost Rate Type	Awards: P 5.2 Q 1.0 Popup Q 9.0	Indirect Cost Rate Type	UFIRST Proposals
Allocation Indirect Rate Base	Awards: P 5.2 Q 1.0 Popup Q 10.0	Indirect Cost Base	UFIRST Proposals
Purpose	Awards: P 5.1 Q 1.0 "Define Project" Popup Q	Project Purpose	UFIRST
Project Type	Awards: P 5.1 Q 1.0 "Define Project" Popup Q	Project Type	UFIRST
Allocation Start Date	Awards: P 5.1 Q 1.0 "Define Project" Popup Q	Earliest Allocation Start Date of the myUFL Project	UFIRST
Allocation End Date	Awards: P 5.1 Q 1.0 "Define Project" Popup Q	Latest Allocation End Date of the myUFL Project	UFIRST
Fund Code	Awards: myUFL Integration Popup Question 1.	Project Fund Code	UFIRST
Project Active Today	Derived Field	Is today's date between the allocation start and end date?	Derived Field
Project Status Closed	Award Workspace	Is the Project closed in myUFL?	UFIRST
Sponsor Authorized Amount	Awards: P 5.4 Q 1.0	Sponsor Authorized Amount to Date, for this Project	UFIRST
Fund Activated Date	Awards: Activity Details, History Log	Date the Allocation became activated in myUFL. This is the date that is used to 'count' the dollars for institutional reporting.	UFIRST
Type of Allocation	Derived Field	Source of Funds: Baseline Award or Subsequent Modification	Derived Field
Modification ID	Derived Field	Funds 201/209: Allocation ID; Fund 214: myUFL Project, Journal & Payment ID	Derived Field
Award Full Title	Awards: P 1.0 Q 5.0	Award Full Title	UFIRST
Internal Sponsor	Derived Field	Is the sponsor internal to UF? If so, the funds are not counted in overall award totals.	myUFL

## Award Portfolio Report Data Dictionary

Report Field Name	UFIRST Location	Description	Original Data Source
Award ID	Award Workspace	Auto assigned UFIRST Award ID number	UFIRST
Award Primary Investigator	Awards: P 1.0 Q 1.0a	Award Principal Investigator Name	myUFL: Name comes from UF Business Name (Source: HR.Registry. This name match
Award Primary Investigator UFID	Not Visible at Entry	Award Principal Investigator UFID	myUFL: HRPRD9/PS.JOB table/EMPLID
Award Department	Awards: P 1.0 Q 2.0	Award Responsible Dept Description from Award Smartform page 1.0	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
Award DeptID	Not Visible at Entry	Award Responsible DeptID from Award Smartform page 1.0	myUFL: HRPRD9/PS.JOB table/DEPTID
Full Title	Awards: P 1.0 Q 5.0	Award Full Title	UFIRST
Direct Sponsor Name	Awards: P 1.0 Q 6.0a	Direct Sponsor Name	myUFL: FIPRD9/PS_CUSTOMER TABLE (Select NAME1 where SETID='GRANT')
Flowthrough Sponsor Name	Awards: P 1.0 Q 7.0a	Primary or Flowthrough Sponsor Name	myUFL: FIPRD9/PS_CUSTOMER TABLE (Select NAME1 where SETID='GRANT')
Reporting Sponsor Name	Derived Field	Sponsor used in institutional reporting. If Primary Sponsor is Null, this is Direct Sponsor.	Derived Field
Activated Award Date	Awards: Activity Details, History Log	Date the Allocation became activated in myUFL. This is the date that is used to 'count' the dollars for institutional reporting.	UFIRST
Award Overall Start Date	Awards: P 1.0 Q 11.0	Overall Start Date; First day of the award as identified in the funding document.	UFIRST
Award Overall End Date	Awards: P 1.0 Q 12.0	Overall End Date; Last day of the award as identified in the funding document.	UFIRST
Sponsor Award Date	Awards: P 1.0 Q 10.0	Sponsor Award Date; Date that the award is effective or issued.	UFIRST
Award is a Transfer from a Previous Institution	Awards: P 1.0 Q 13.0	Identifies if the award is transferred from another applicant or awardee to UF.	UFIRST
Sponsor Authorized Amount to Date, Dollars (Overall Award)	Awards: P 5.4 Q 1.0	Sponsor Authorized Amount to Date	UFIRST
Pending Sponsor Authorized Amount, Dollars (Overall Award)	Awards: P 5.4 Q 1.0	Total Amt Pending Sponsor Authorization	UFIRST
Total Anticipated Award Amount, Dollars (Overall Award)	Awards: P 5.4 Q 1.0	Total Anticipated Award Amount	UFIRST

## Project Portfolio Report Data Dictionary

Report Field Name	UFIRST Location	Description	Original Data Source
myUFL ProjectID	Awards: P 5.1 Q 1.0	myUFL Project ID	myUFL
Project Manager	Awards: P 5.1 Q 1.0 "Define Project" Popup Q 3.0	Project Manager Name	myUFL: Name comes from UF Business Name (Source: HR.Registry. This name match
Project Unit Responsible DeptID	Not Visible at Entry	Responsible Unit DeptID	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
Project Unit Responsible DeptID Descr	Awards: P 5.1 Q 1.0 "Define Project" Popup Q 5.0	Responsible Unit Descr	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
Indirect Cost Rate	Awards: P 5.1 Q 1.0 "Define Project" Popup Q 2.0	Allocation Indirect Cost Rate	UFIRST
Project Type	Awards: P 5.1 Q 1.0 "Define Project" Popup Q 8.0	Project Type	UFIRST
Project Purpose	Awards: P 5.1 Q 1.0 "Define Project" Popup Q 7.0	Project Purpose	UFIRST
Award ID	Award Workspace	Auto assigned UFIRST Award ID number	UFIRST
Award Primary Investigator	Awards: P 1.0 Q 1.0a	Award Principal Investigator Name	myUFL: Name comes from UF Business Name (Source: HR.Registry. This name match
Award Primary Investigator UFID	Not Visible at Entry	Award Principal Investigator UFID	myUFL: HRPRD9/PS.JOB table/EMPLID
Award Department	Awards: P 1.0 Q 2.0	Award Responsible Dept Description from Award Smartform page 1.0	myUFL: FIPRD9/PS_DEPT_TBL/DESCR [Original Org Structure from FIPRD9/KK_DEPT
Award DeptID	Not Visible at Entry	Award Responsible DeptID from Award Smartform page 1.0	myUFL: HRPRD9/PS.JOB table/DEPTID
Full Title	Awards: P 1.0 Q 5.0	Award Full Title	UFIRST
Direct Sponsor Name	Awards: P 1.0 Q 6.0a	Direct Sponsor Name	myUFL: FIPRD9/PS_CUSTOMER TABLE (Select NAME1 where SETID='GRANT')
Reporting Sponsor Name	Derived Field	Sponsor used in institutional reporting. If Primary Sponsor is Null, this is Direct Sponsor.	Derived Field
Project Start Date	Awards: P 5.1 Q 1.0 "Define Project" Popup Q 2.0	Earliest Allocation Start Date of the myUFL Project	UFIRST
Project End Date	Awards: P 5.1 Q 1.0 "Define Project" Popup Q 2.0	Latest Allocation End Date of the myUFL Project	UFIRST
Activated Award Date	Awards: Activity Details, History Log	Date the Allocation became activated in myUFL. This is the date that is used to 'count' the dollars for institutional reporting.	UFIRST
Sponsor Award Date	Awards: P 1.0 Q 10.0	Sponsor Award Date; Date that the award is effective or issued.	UFIRST
Overall Start Date	Awards: P 1.0 Q 11.0	Overall Start Date; First day of the award as identified in the funding document.	UFIRST
Overall End Date	Awards: P 1.0 Q 12.0	Overall End Date; Last day of the award as identified in the funding document.	UFIRST
Award is a Transfer from a Previous Institution	Awards: P 1.0 Q 13.0	Identifies if the award is transferred from another applicant or awardee to UF.	UFIRST



## Award Financial Report Crosswalk to History

Field Name **FIELD NAMES LIMITED TO 30 CHARACTERS**	Report Field Name	Crosswalk to Historical SRM_Live
CLK_AWD_PROJ_ID	Project ID	PS Project
EXCEPTION	Exception Code	No Match
UNIVERSITY_REPORTABLE	Reportable Allocation	No Match
FUNDS_ACTIVATED	Fund Activated Date	Award Date (History lacked definition)
REPORTING_SPONSOR_NAME	Reporting Sponsor Name	Prime Sponsor; Prime Sponsor Division; Prime PI
CLK_AWD_PROJ_MGR	Project Manager	PI
CLK_AWD_RESP_UNIT	Project Responsible Unit	Dept
CLK_AWD_RESP_UNIT_DEPTID	Project Responsible Unit DeptID	DeptID/Project DeptID
DIRECT_AMOUNT	Direct Amount	Total Direct
INDIRECT_AMOUNT	Indirect Amount	Total Indirect
SPONSOR_AUTHORIZED_AMOUNT	Total Sponsor Authorized Amount	Total Awarded
REPORTING_SPONSOR_CAT	Reporting Sponsor Category	Prime Sponsor Type
CLK_AWD_SPONSOR_NAME	Direct Sponsor Name	Sponsoring Agency
CLK_AWD_SPONSOR_CAT	Direct Sponsor Category	Agency Category
CLK_AWD_PRIME_SPONSOR_NAME	Prime Sponsor Name	If Subcontract Type = 'ToUF', then Subcontract
CLK_AWD_PRIME_SPONSOR_CAT	Prime Sponsor Category	If Subcontract Type = 'ToUF', then SubAgency C
CLK_AWD_SPONSOR_AWARD_ID	Direct Sponsor Award ID	Agency Number
CLK_AWD_PRIME_SPONSOR_AWARD_ID	Prime Sponsor Award ID	SubcontractNumber
CLK_AWD_PROJ_COLLEGE	Project College	College
Available in Model Only	Project College Short Name	No Match
FY_DATE_ACTIVATED	Fiscal Year	Fiscal Year
FO_DATE_ACTIVATED	Fiscal Quarter	No Match
FM_DATE_ACTIVATED	Fiscal Month	No Match
MONTH_DATE_ACTIVATED	Calendar Month	No Match
CLK_AWD_PROJ_MGR_DEPT	Project Manager Home Department	No Match
CLK_AWD_PROJ_MGR_DEPTID	Project Manager Home DeptID	No Match
CLK_AWD_PROJ_MGR_COLLEGE	Project Manager College	No Match
REPORTING_SPONSOR_CUSTID	Reporting Sponsor CustID	No Match
REPORTING_SPONSOR_AWARD_ID	Reporting Sponsor Award ID	No Match
Available in Model Only	Reporting Sponsor Type	No Match
CLK_AWD_SPONSOR_CUSTID	Direct Sponsor CustID	No Match
Available in Model Only	Direct Sponsor Type	No Match
CLK_AWD_PRIME_SPONSOR_CUSTID	Prime Sponsor CustID	No Match
Available in Model Only	Prime Sponsor Type	No Match
CLK_AWD_ID	Award ID	PS_Contract
CLK_AWD_STATE	Award Current State	Record Status
CLK_AWD_DEPT	Award Department	No Match
CLK_AWD_COLLEGE	Award College	No Match
CLK_AWD_DEPTID	Award DeptID	Contract DeptID
Available in Model Only	Award College Short Name	No Match
Available in Model Only	Award Department Short Name	No Match
CLK_AWD_PI	Award PI	Contract PI
CLK_AWD_PI_DEPT	Award PI Home Department	No Match
CLK_AWD_PI_DEPTID	Award PI Home DeptID	No Match
CLK_AWD_PI_COLLEGE	Award PI Home College	No Match
CLK_AWD_COST_SHARE	CostShare	This is only Yes/No; no direct match to 'Cost SH
CLK_AWD_LAB_ANMLS	Lab Animals	Animals
CLK_AWD_HUMAN_SUBJ	Human Subject	Humans
SRC	Type of Allocation	Type
ALLOCATION_ID	Allocation ID	DSR Number
MOD_PAY_ID	Modification ID	No Match
CLK_AWD_ALLOC_IND_COST_RATE	Allocation Indirect Cost Rate %	No Match
CLK_AWD_ALLOC_IND_COST_RATE_TYPE	Allocation Indirect Cost Rate Type	Indirect Rate On
CLK_AWD_ALLOC_IND_COST_RATE_BASE	Allocation Indirect Rate Base	Indirect Base On
CLK_AWD_PURPOSE	Purpose	Category
CLK_AWD_PROJ_TYPE	Project Type	Clinical Trial (plus add'l information)
CLK_AWD_OVERALL_START_DATE	Award Overall Start Date	No Match
CLK_AWD_OVERALL_END_DATE	Award Overall End Date	No Match
CLK_AWD_PRJ_START_DT	Project Start Date	Project Begin Date
CLK_AWD_PRJ_END_DT	Project End Date	Project End Date
CLK_AWD_ALLOC_STRT_DT	Allocation Start Date	Budget Begin Date
CLK_AWD_ALLOC_END_DT	Allocation End Date	Budget End Date
AWD_PI_PREEM	Award PI: Preeminent Faculty	No Match
PRJ_MGR_PREEM	Project Manager: Preeminent Faculty	No Match
CLK_AWD_PS_FUND_CODE_ID	Fund Code	No Match
CLK_AWD_PROJ_ACTIVE	Project Active Today	Record Status
CLK_AWD_PROJ_CLOSED	Project Closed	No Match
CLK_AWD_PROJ_NAME	Project Name	Title
CLK_AWD_FULL_TITLE	Award Full Title	No Match

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## Create View, Set Prompts and Schedule an Email

In this example, you will create a view, set the prompts and schedule it to be delivered.

1. Login to myUFL
    - Open an internet browser
    - Navigate to my.ufl.edu
    - Click the Access myUFL button
    - Enter your GatorLink username and password
    - Click the Login button
  2. Click the **Main Menu > Enterprise Reporting > Access Reporting**
  3. Find a report you want to replicate. For this example, I'm using the Employee Training Record
  4. Click the **Create a report view of this report** icon.
  5. Click the **Select My Folders** link.
  6. Click the **Finish** link.
  7. Click the **My Folders** link.
    - You have now created a view of the Employee Training Record.
  8. Click the **Set properties** button.
  9. Click the **Report view** link.
  10. Click the **Default action** list.
  11. Point to the **Run the report** list item and select the **Run the report** list item.
  12. Click the **Override the default values** option, and select the **Format** list, **PDF**.
  13. Click the **Set** link.
    - This is where you will set the prompts for this report.
  14. Click the **Prompt for values** option to remove the check and use only the prompts you entered.
  15. Click the **OK** link.
- Next you'll need to set the calendar and schedule the email.
16. Click the **Calendar** link and select the start time and end times.
  17. Click the **Override the default values** option.
  18. Click the **Edit the options** link.
  19. Your email address appears in the To field. Add other people to the list as needed.

- 
- The **Subject** field will be the subject of the email. If you leave this alone, when the recipient sorts his or her email, it will appear together.
  - Click in the **Body** of the email and enter what you would have appear there.

20. Click the **Attach the report** option.

- **Include a link to the report** will give the recipients access to the report via a link. To access the link, he or she would have to be signed in.
- **Attach the report** means that a copy of the report will be attached to the email.

21. Click the **OK** button.

22. Click the **OK** button.

If you need assistance Contact the UF Help Desk:

- 392-HELP
- helpdesk@ufl.edu

## Cognos browser incompatibility issues

Do you have issues with Enterprise Reporting and Cognos reports like any of the following:

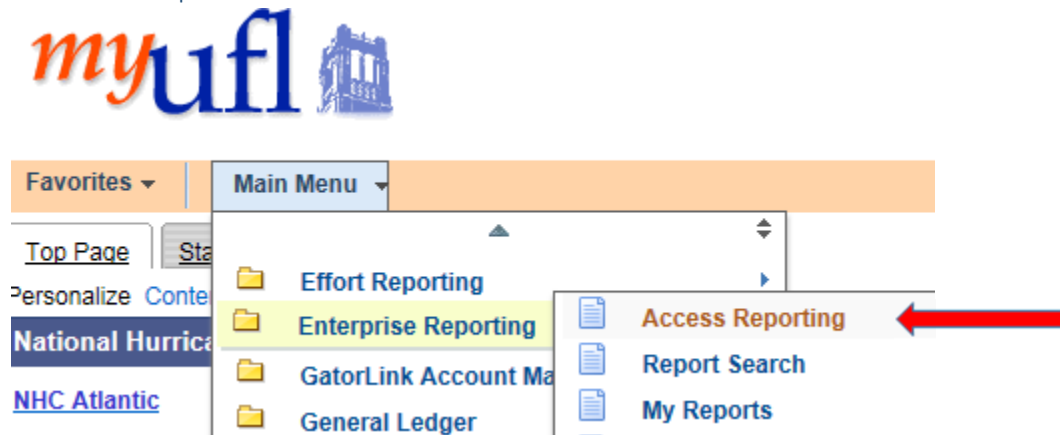
1. The reports take much longer to run than they used to be
2. The report tries to load, then the customer gets an error: adobe acrobat reader could not open PDF because it is not a supported file type
3. After navigation to the report and entering all the pertinent data, the customer got a blank screen
4. Basically same problem as #4, even if tried to save it to the local machine, it can't be enabled editing (not cognos problem, need to contact TSS)

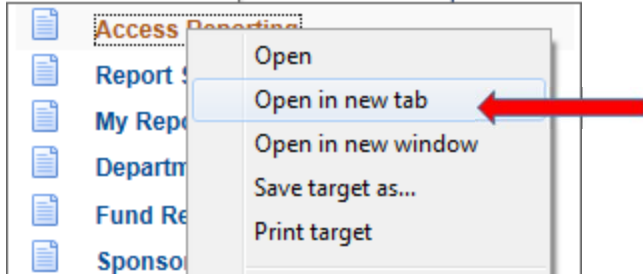
### Solutions:

1. First check what browser the customer is using and which version. Make sure they use Internet Explorer, as it is the only browser fully supported by Cognos.
2. Check if they have the Compatibility View on for ufl.edu
3. Find out which report the customer is trying to run, run it on your own machine, make sure it is not the report itself has problem
4. Try the following method to fix the issue:

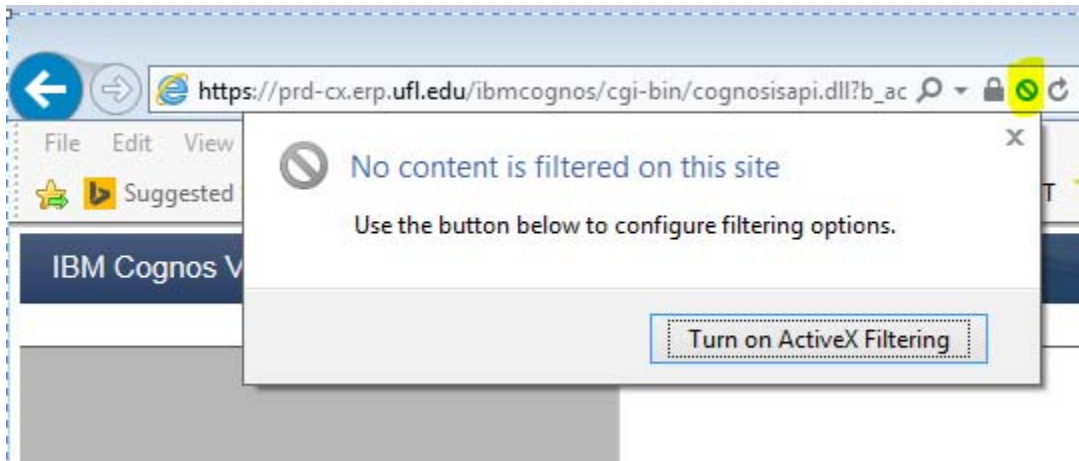
Method 1: Navigate directly to Enterprise Reporting in a new browser: <https://prd-cx.erp.ufl.edu/ibmcognos>

Method 2: Navigate to 'Enterprise Reporting > Access Reporting'. Right click 'Access Reporting' and select 'Open in new tab'

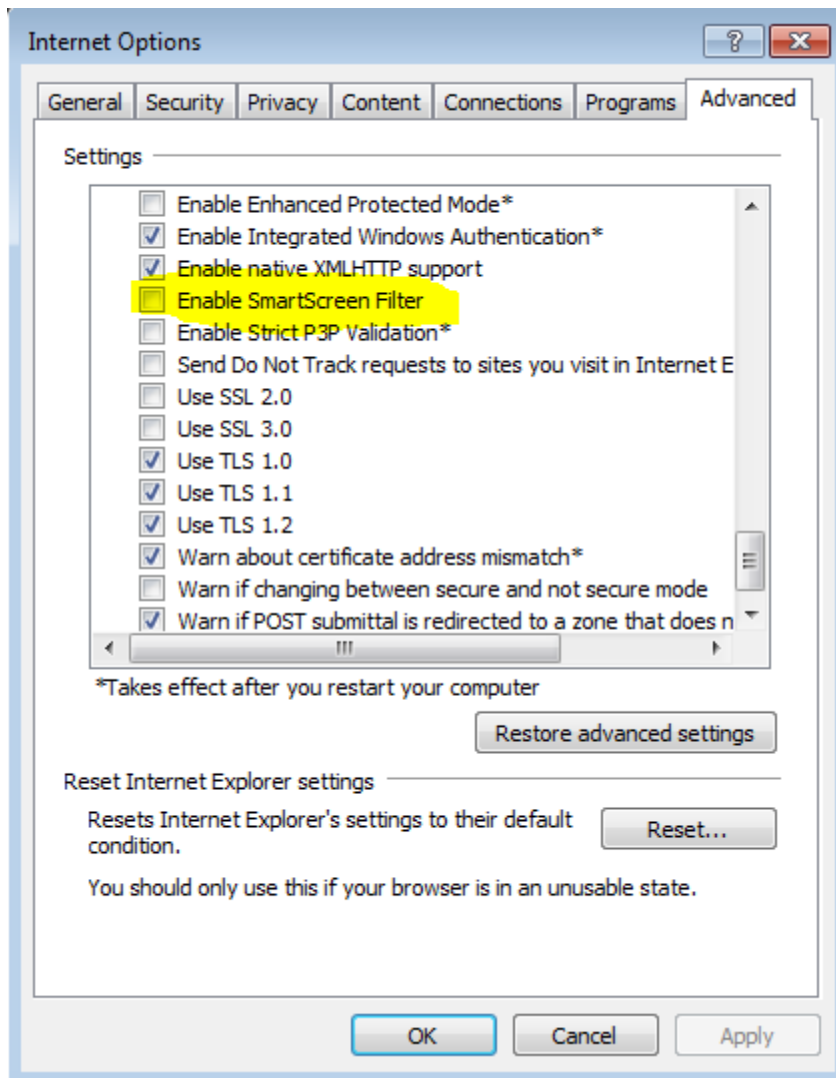




Method 3: If there is a “prohibit” sign (highlighted yellow), click on it and click on “Turn on ActiveX Filtering”.

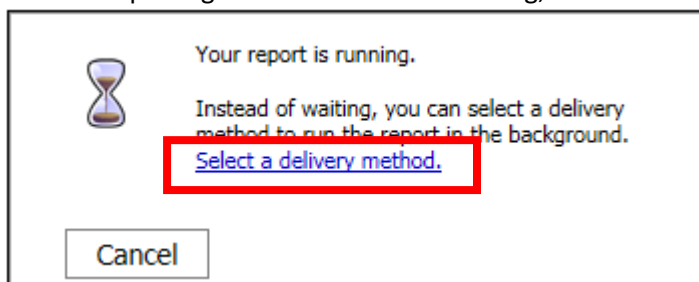


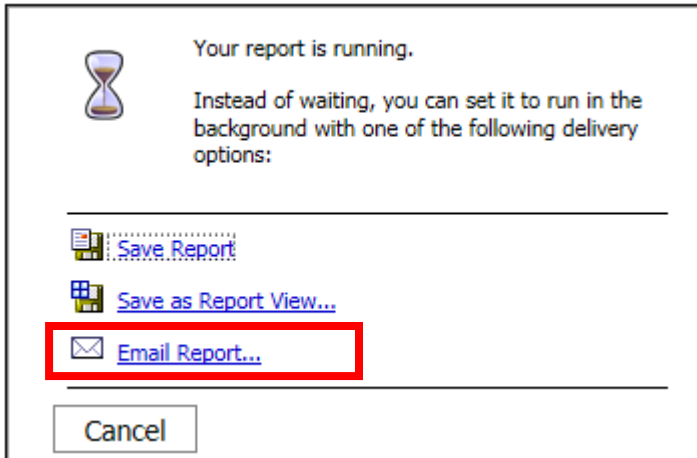
Method 4: When there is no “prohibit” sign when rendering the file: Unchecked the “Enable SmartScreen Filter”, close IE and reopen again.



Method 5: When the report runs, but returns a blank page after done loading

a) Run the report again. When it is still running, set it to send to you





Set the email options - CYFWD 739500 & 785000 Txn Detail Help

Specify the recipients and contents of the email. To add recipients, click [Select the recipients...](#) or type the email addresses separated by semi-colons. To include an HTML report as the message body, leave the Body box empty and select the report as the only attachment.

To:

  
  
[Select the recipients...](#) [Show Bcc](#)

Cc:

Subject:

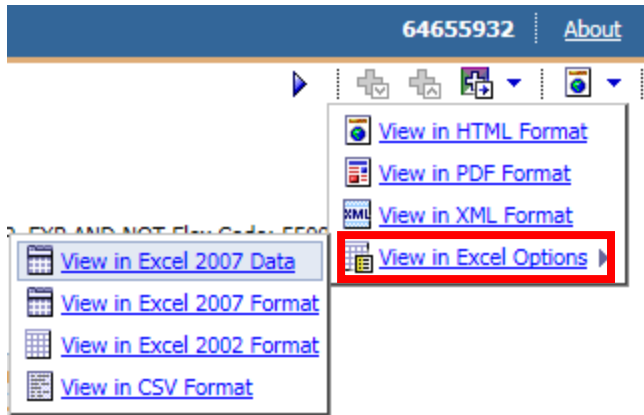
Body: [Change to plain text >>](#)

Attach the report

OK Cancel

- b) Open the report in Excel and save it to the local machine  
At right up corner of the blank page:





For more browser configuration issue, please check:

<https://connect.ufl.edu/it/wiki/Pages/Forms/DispForm.aspx?ID=369>