

Q2. Which reports do the SPA Award Maintenance Team use to monitor awards?

Various reports are used by the SPA Award Maintenance team to monitor awards. Below is a list of the most used reports located in **PeopleSoft** and **ORBIT**:

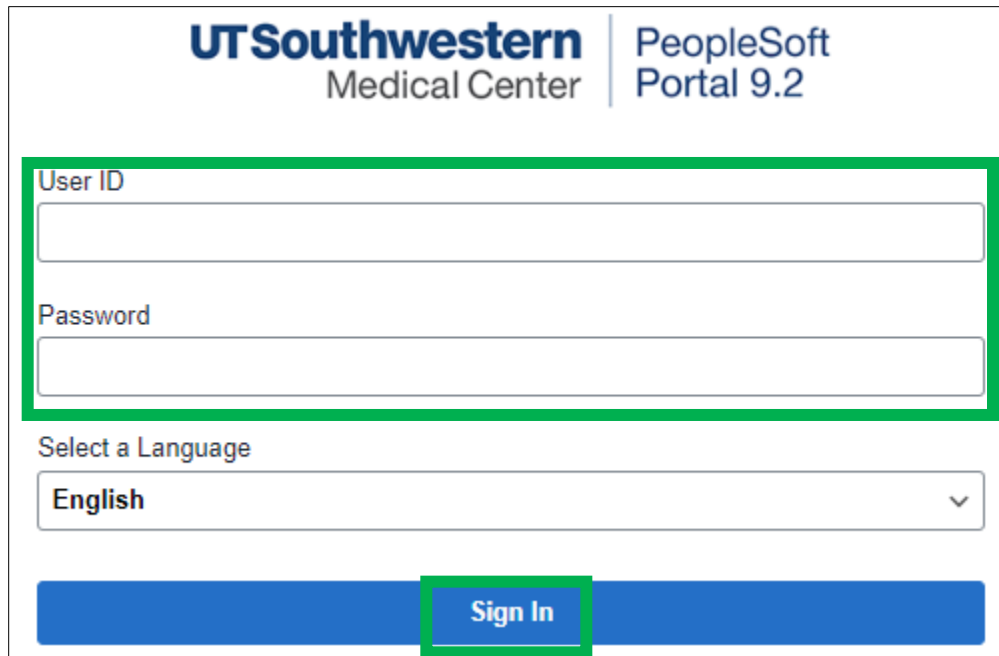
PEOPLESOFT	ORBIT
<p><u>Budget Overview</u></p> <ul style="list-style-type: none"> Look at Financial Reporting <p><u>Query Viewer</u></p> <ul style="list-style-type: none"> UT_GM_BUDGET_DETAIL UTGM_BI_PROJ_RSRC_BY_CONTRACT 	<p><u>KKi001 Commitment Control Transaction Details</u> Used for budget purposes to monitor grant/gift/endowment spending, including encumbrances</p> <p><u>FDi001 General Ledger Transaction Detail</u> Used for tracking departmental cash balance based on actual posted transactions</p> <p><u>SCi005 Invoices Vouchered by Accounts Payable</u> Invoices vouchered by accounts payable reconciliation</p>

To view budget details and projects by contract, access the **Query Viewer** feature in **PeopleSoft**.

From the [Tools](#) page on the UTSW intranet website, select **PeopleSoft**.

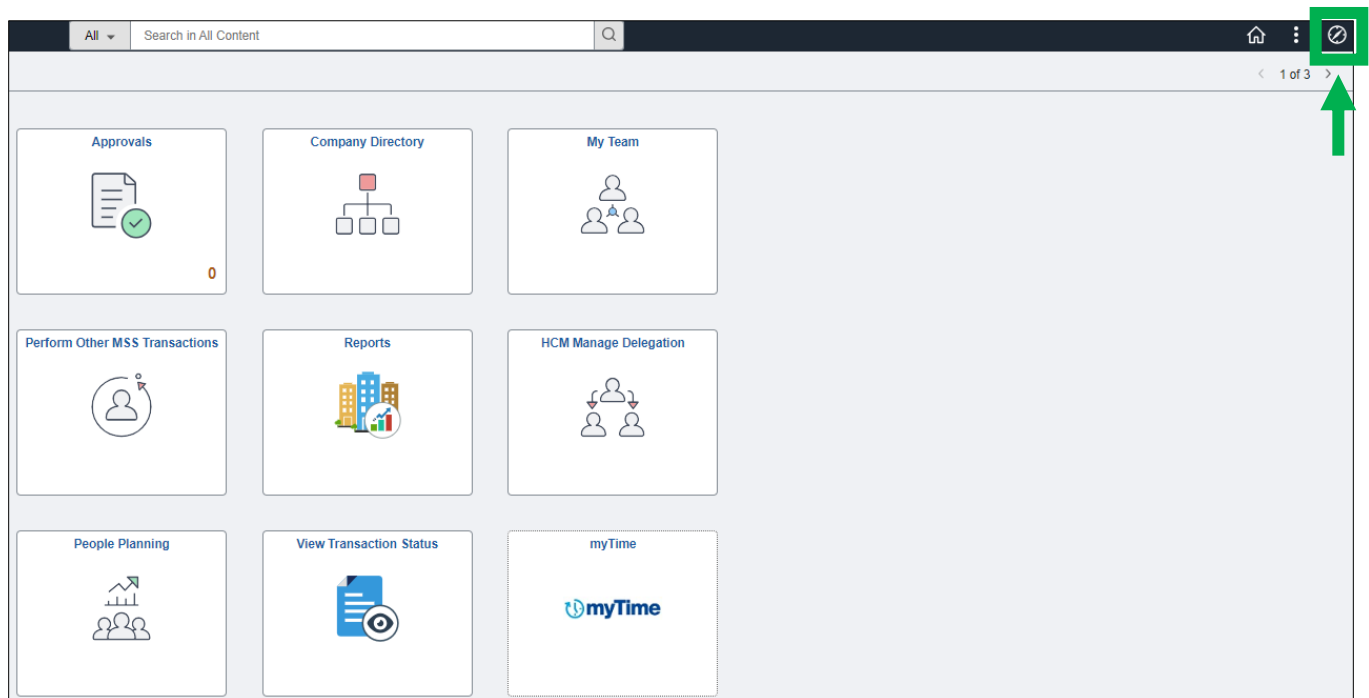
The screenshot shows the UTSW Medical Center intranet. The top navigation bar includes 'About Us', 'Administration', 'Departments & Centers', 'Education', 'Hospital & Clinics', 'Human Resources', 'Research', 'Services', and 'Tools'. The 'Tools' menu item is highlighted with a green box. Below the navigation bar, the 'Tools' page is displayed with a list of various tools and services. The 'PeopleSoft' link is highlighted with a green box, and a red arrow points from the 'Tools' menu item to this link.

Login with your **UTSW User ID** and **Password**.



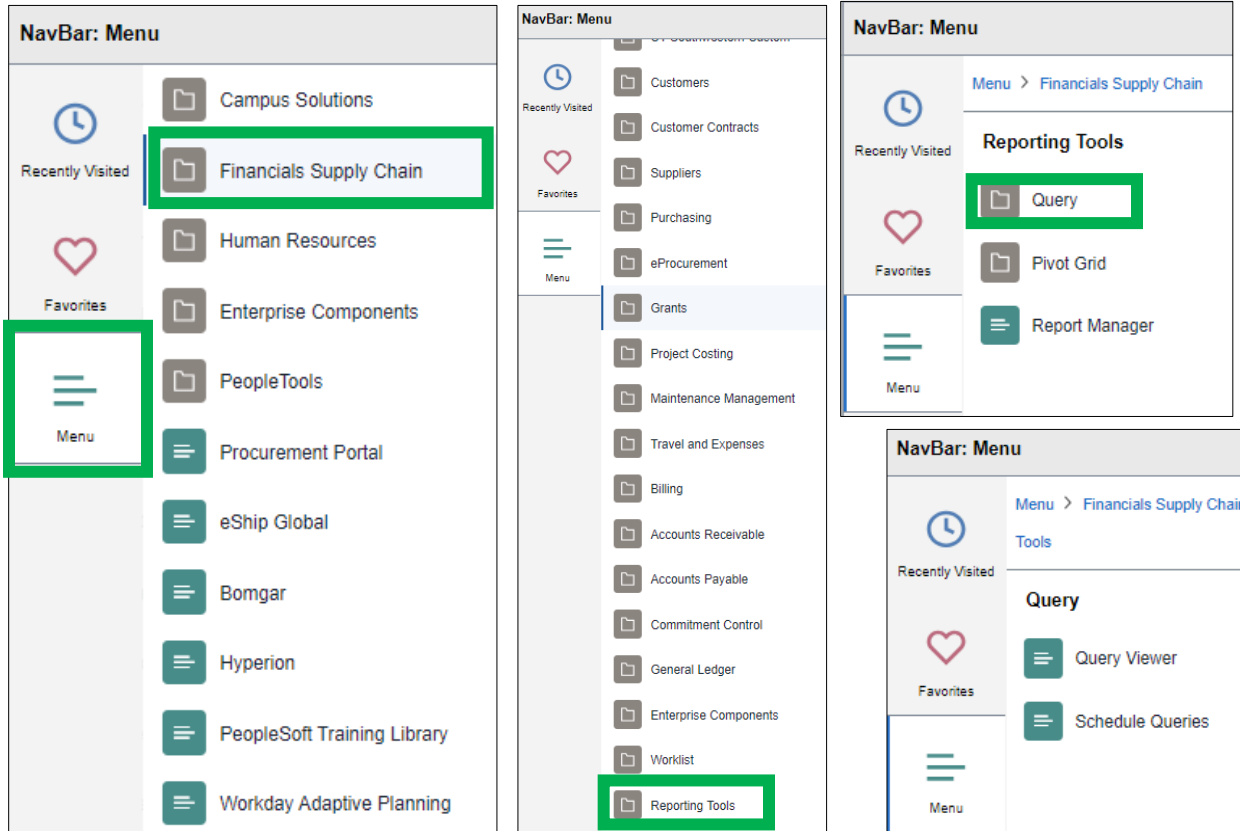
The image shows the login page for the UT Southwestern Medical Center PeopleSoft Portal 9.2. The page features the organization's logo and name at the top. Below the logo, there are two input fields: "User ID" and "Password". A green rectangular box highlights both of these input fields. Below the password field, there is a "Select a Language" dropdown menu with "English" selected. At the bottom of the form, there is a blue "Sign In" button, which is also highlighted with a green rectangular box.

From the **Self-Service** page, click the **Navigation** tool located in the top right corner of the screen.

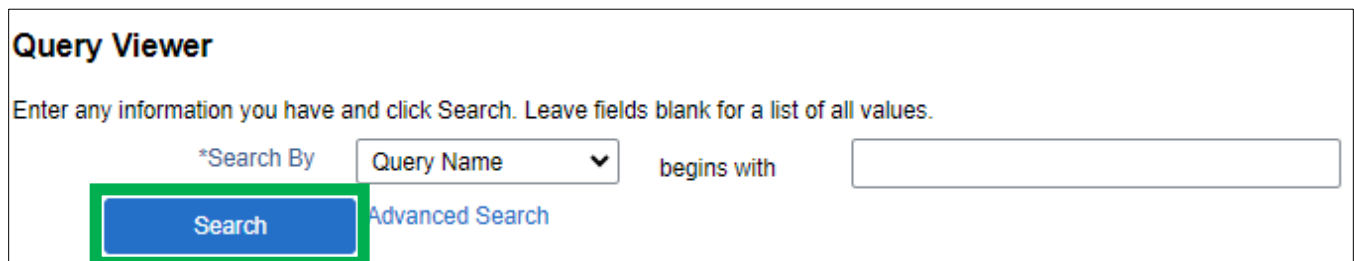


Select the **Menu** icon to view several options. To locate the Query Viewer, select the following options in this order:

- **Financials Supply Chain**
- **Reporting Tools**
- **Query**
- **Query Viewer**



From the **Query Viewer** page, click **Search**.



Users may now view the UTGM budget overview.

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

[Search](#) [Advanced Search](#)

Search Results

Too many items met your search criteria. Only the first 300 items displayed.

*Folder View

Query

1-30 of 300 | [View 100](#)

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
AP_VOUCHER_ACCTG_PS_	AP Voucher Acctg (PS)	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
AR	AR33003-All Levels I	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
AR	AR33001-Level One I	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
AR	AR33002-Level Two	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
AR	AR33003-Level Three	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

To view reports in ORBIT:

From the **Tools** page on the UTSW website, select **ORBIT**.

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Tools

<ul style="list-style-type: none"> A-Z Index ADAPT Archibus Clinical Trials Compliance Report CORE LIMS Doctor & Faculty Profiles eAgreements eGrants eIRB Entrada Find A Doctor Focus On Faculty Health System Portal iLab Operations 	<ul style="list-style-type: none"> i2b2 Clinical Research Data Warehouse Study Feasibility Application Kronos Library MyChart myTime Login Net Guide ORBIT – UTSW Reporting Portal Outlook Web App (Children's) Outlook Web App (Parkland) Outlook Web App (UT Southwestern) Pathfinder PeopleSoft Phone Directory Policy Library Procurement Portal 	<ul style="list-style-type: none"> Profile+ (Updates to faculty profiles) ReadySet REDCap Research Portal Talent Acquisition Management Taleo Learn TOPAZ Total Professional Effort TracDat UTSW ServiceNow Velos Web Resources <ul style="list-style-type: none"> Faculty (Faculty Corner) Postdocs (Graduate School of Biomedical Sciences) Students
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Click the **Subject Area for Financials**.

UTSouthwestern SharePoint

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[Standard EDW Reports for PeopleSoft 9.2](#)

✓ Title Dashboard ID Status Executive Version Full Version Static Version PivotTable Version

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- Subject Area : **Clinical Research** (3)
- Subject Area : **Facilities Management** (6)
- **Subject Area : Financials** (21)
- Subject Area : **Grant Proposals, Funding, and Research Expenditures** (9)
- Subject Area : **Leave, Payroll, and Timekeeping** (7)
- Subject Area : **Others** (3)
- Subject Area : **Supply Chain** (6)
- Subject Area : **Workforce Metrics** (17)

A list of reports will appear. The three reports most used by the SPA Maintenance Team are:

- **GL Transaction Detail, FDi001**
- **KK Commitment Control Transactions, KKi001**
- **Invoices Vouchered by Accounts Payable, Sci005**