LSU | GeauxGrants

Submitted Activity Report (SAR) Instructions

The Submitted Activity Report captures proposal submission information. The reports are intended for internal use for College, Departments, and Investigators. All external reports are prepared and reported by the appropriate central administration unit.

Report Criteria

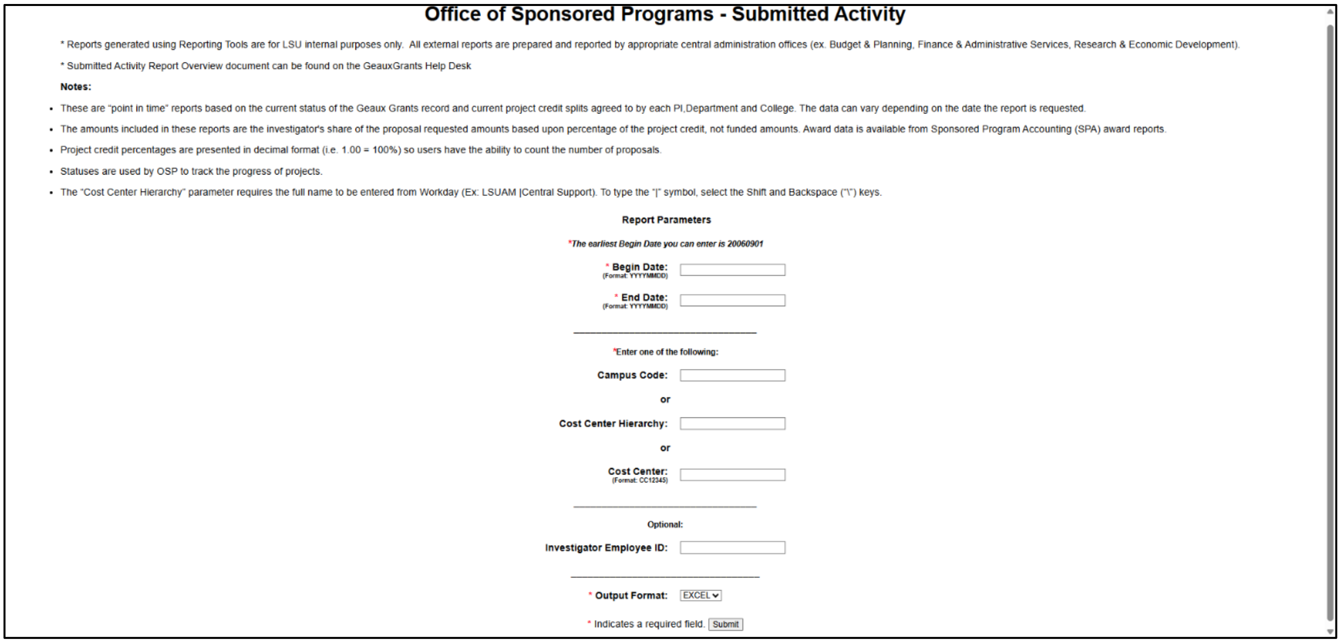
- Date of proposal is based on the “Submitted” date in GeauxGrants.
- Proposal Types of New, Supplement, Renewal, Resubmission and Continuation-New are included.
- The SAR does not pull Proposal Types of Modifications/Prior Approval Requests, Revisions, Pre-proposals, Notice/Letter of Intent or Continuations-Noncompeting.
- The SAR does not pull proposals with a status of Pending, Routing, Routing Approvals Received or Withdrawn by PI.
    - Prior to FY20, the report does not pull proposals with a status of Withdrawn.

Report Disclaimers

- The SAR includes submitted proposal information beginning September 1, 2006.
- The SAR relies on accurate information being entered into GeauxGrants by users.
- The SAR is a “point in time” report so individual reports cannot be recreated. As updates, status changes, and revisions are made in GeauxGrants, the data in the report changes.
- Subprojects are counted as separate proposals in order to capture the correct dollar amount requested.

How to Access the Report

Users can access the reports in myLSU under Reporting Tools > Financial Services. Under Reporting Tools, select Research Reporting, Sponsored Programs Submitted Activity report to access report.


Office of Sponsored Programs - Submitted Activity

* Reports generated using Reporting Tools are for LSU internal purposes only. All external reports are prepared and reported by appropriate central administration offices (ex. Budget & Planning, Finance & Administrative Services, Research & Economic Development).

* Submitted Activity Report Overview document can be found on the GeauxGrants Help Desk

Notes:

- These are "point in time" reports based on the current status of the Geaux Grants record and current project credit splits agreed to by each PI,Department and College. The data can vary depending on the date the report is requested.
- The amounts included in these reports are the investigator's share of the proposal requested amounts based upon percentage of the project credit, not funded amounts. Award data is available from Sponsored Program Accounting (SPA) award reports.
- Project credit percentages are presented in decimal format (i.e. 1.00 = 100%) so users have the ability to count the number of proposals.
- Statuses are used by OSP to track the progress of projects.
- The "Cost Center Hierarchy" parameter requires the full name to be entered from Workday (Ex: LSUAM |Central Support). To type the "|" symbol, select the Shift and Backspace ("\") keys.

Report Parameters

**The earliest Begin Date you can enter is 20060901*

* Begin Date: (Format: YYYYMMDD)

* End Date: (Format: YYYYMMDD)

*Enter one of the following:

Campus Code:

or

Cost Center Hierarchy:

or

Cost Center: (Format: CC12345)

Optional:

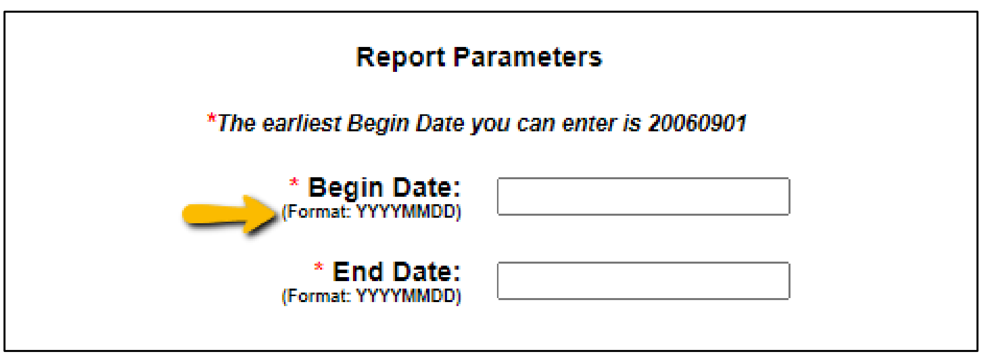
Investigator Employee ID:

* Output Format: EXCEL

* Indicates a required field. Submit

How to Run the Report

- **Step 1**: You must enter the Begin and End Date of the requested output. Pay attention to the format of the date.


Report Parameters

**The earliest Begin Date you can enter is 20060901*

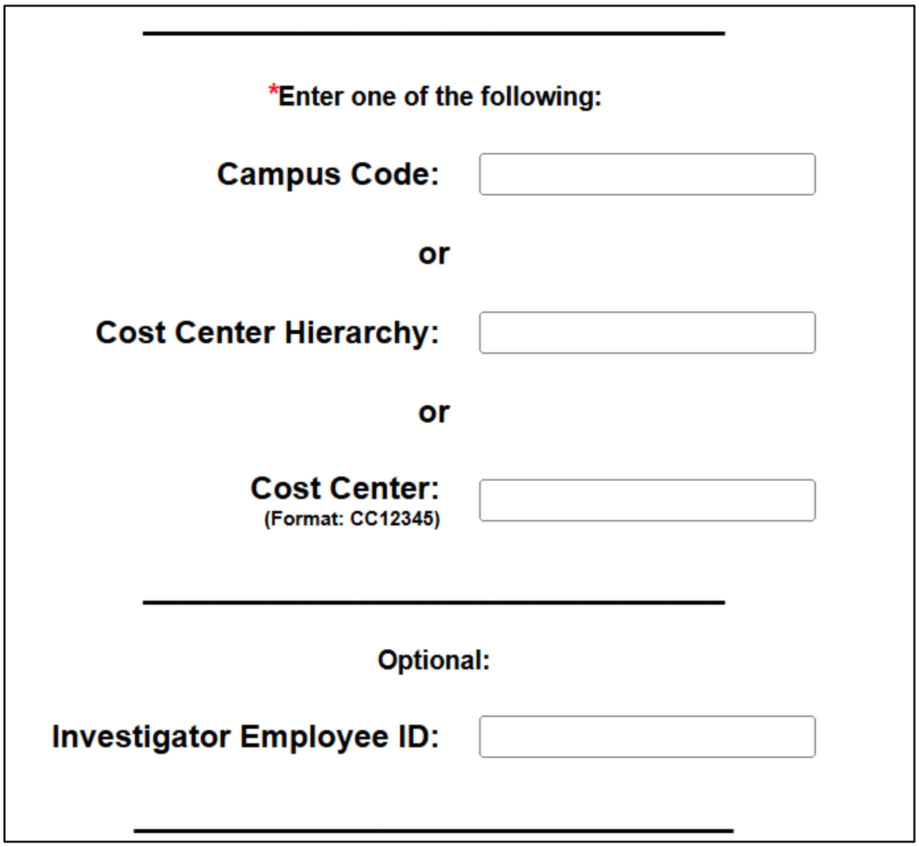
* Begin Date: (Format: YYYYMMDD)

* End Date: (Format: YYYYMMDD)

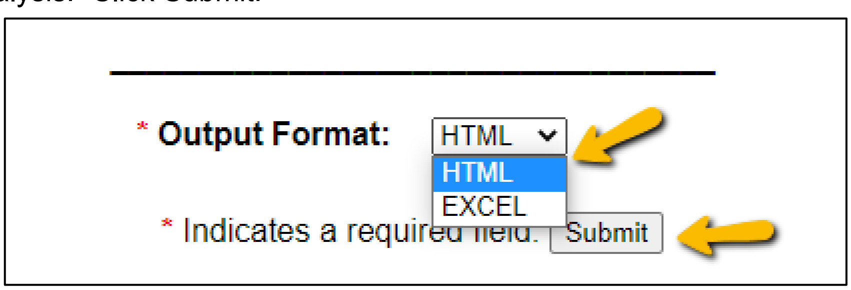
- **Step 2**: Enter your unit.
  - Colleges can search for their entire college using the "Cost Center Hierarchy" from Workday. This requires the full name to be entered (Ex: LSUAM | Central Support).

TIP! **To type the "|" symbol, select the Shift and Backspace ("\") keys.**

  - Departments can search by their Workday Cost Center number.
  - Investigators can search for their output by entering their Workday ID. Workday ID can be found in parenthesis after the Employee's name.



- **Step 3:** Select the Output Format of HTML or Excel. It is recommended you out Excel for analysis. Click Submit.

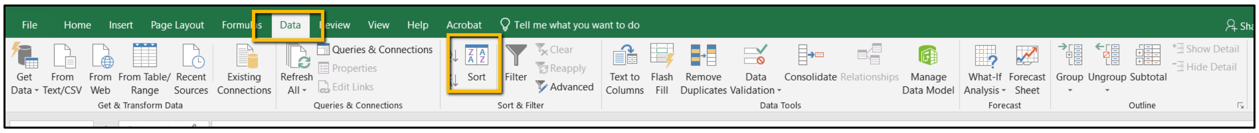


Analyzing Data in Excel

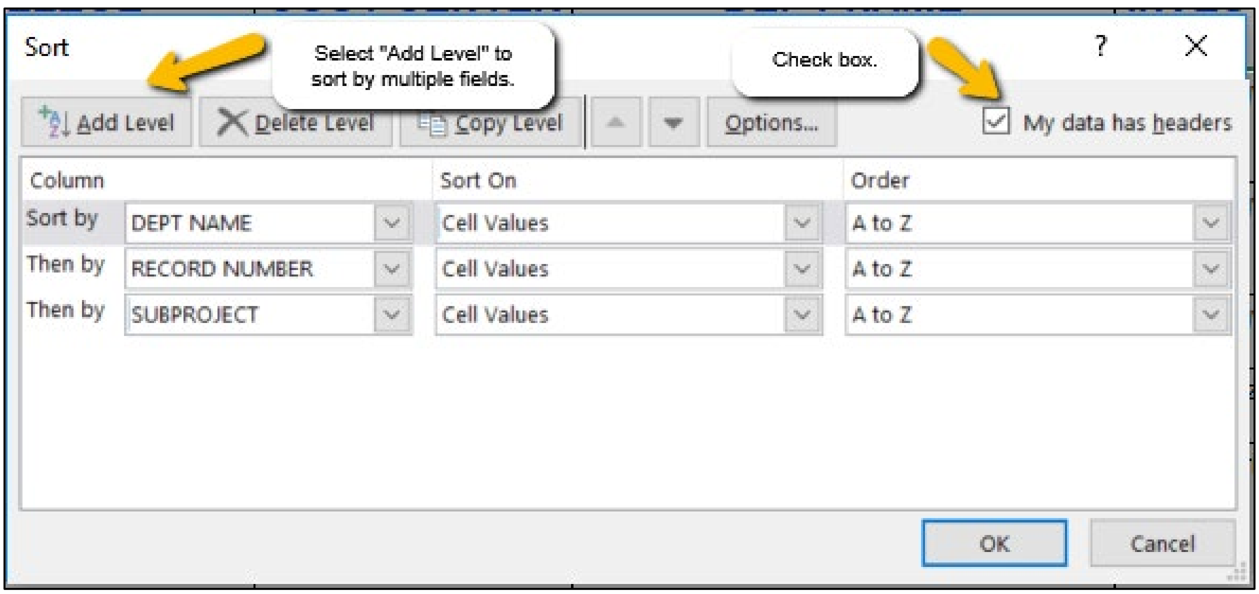
Before sorting, delete report heading (first 10 rows)

Sort by Proposal Count by Department

- **Step 1**: Under Data tab, select "Sort"

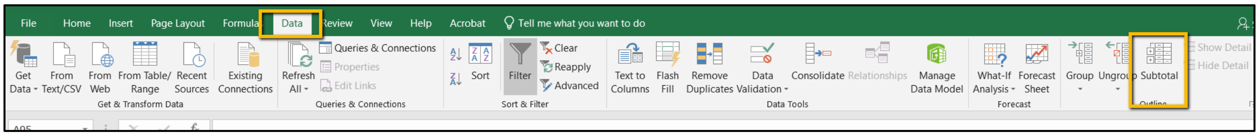


- **Step 2**: Custom Sort by Adding Levels of:
  - Dept Name
  - Record Number
  - Subproject



Subtotal for Proposal Count and Amount

- **Step 1**: Under Data tab, select "Subtotal"



- Step 2: Select the following:
  - At each change in "Dept"
  - Use function "Sum"
  - Add subtotal to: "% Credit" and "Investigator Proposal Amount"
  - Select Summary below data
  - Click "OK"