

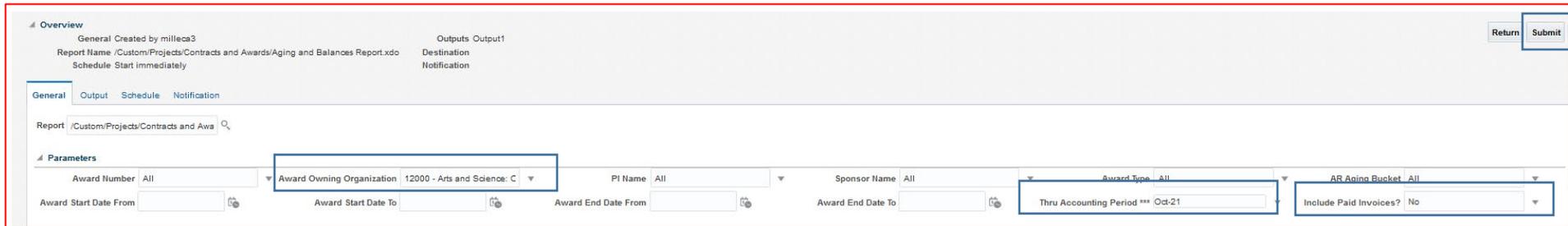
From: Research Finance

Date Updated: November 2021

Subject: Running the Aging and Balances Reports – Grants BU

**PROCEDURES**

1. Navigate in Oracle to Reporting → Reports and Analytics → Browse Catalog
2. Navigate to the following file path: Shared Folders/Custom/Projects/Contracts and Awards.
3. Select Aging and Balances Report → More → Schedule
4. Under Parameters populate the following:
  - a. Award Owing Organization: select Search and select the Owing Organization(s).
  - b. Thru Accounting Period \*\*\*: enter the current Accounting Period
  - c. Include Paid Invoices?: select No
5. Hit Submit



The screenshot shows the Oracle Reporting Parameters form for the report "/Custom/Projects/Contracts and Awards/Aging and Balances Report.xdo". The "Parameters" section is expanded, showing several dropdown menus and text fields. The following parameters are highlighted with blue boxes:

- Award Owing Organization:** 12000 - Arts and Science: C
- Thru Accounting Period \*\*\*:** Oct-21
- Include Paid Invoices?:** No

Other visible parameters include Award Number (All), PI Name (All), Sponsor Name (All), and AR Aging Bucket (All). The "Award Start Date From" and "Award End Date From" fields are empty. The "Return" and "Submit" buttons are visible in the top right corner.

6. Enter Report Job Name (free key field) and OK
7. Hit OK and the Return
8. Select More → History or Job History
9. Once the Status states Success, select Report Job Name → Select Output Name under Republish opening in excel.