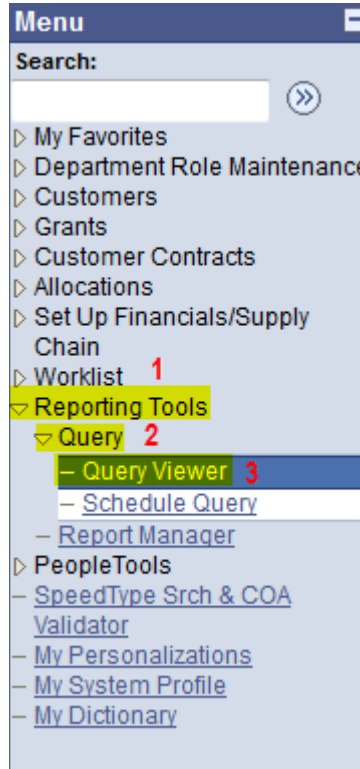


# How to Run Department Status Report

1. Log in to PeopleSoft via MyAccess.
2. In the left hand menu, navigate to Reporting Tools > Query > Query Viewer.



3. Type **ZGM\_OSR\_SUB\_REQUESTS\_OPEN** in the search box. Select **Search** and click **Run to HTML** for the first query. NOTE: The system works most efficiently if you HTML first, then download the query to Excel.

## Query Viewer

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

\*Search By:  begins with  1  
 [Advanced Search](#) 2

## Search Results

\*Folder View:

Query								
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
ZGM_OSR_SUB_REQUESTS_OPEN	Open subaward requests	Public		3 HTML	Excel	XML	Schedule	Favorite
ZGM_OSR_SUB_REQUESTS_OPEN_DEPT	Open subaward requests by Dept	Public		HTML	Excel	XML	Schedule	Favorite

- Type % in the OSR Division box. Select **View Results**, then click **Excel Spreadsheet** to download the report in Excel.

### ZGM\_OSR\_SUB\_REQUESTS\_OPEN - Open subaward requests

In Procss >#Days (ex. 0 or 30):

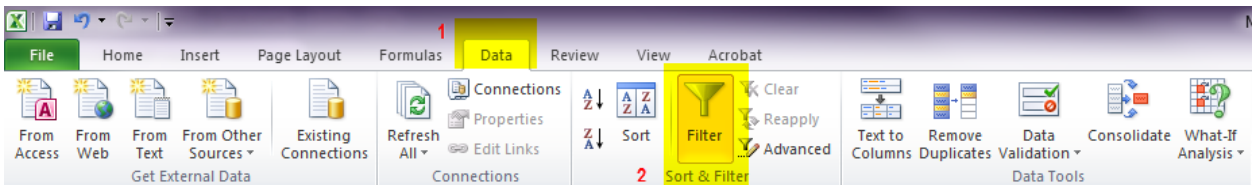
OSR Division:  1

**View Results** 2

Download results in : **Excel Spreadsheet** 3 [CSV Text File](#) [XML File \(364 kb\)](#)

[View All](#)

- The report pulls all subaward activity for UCSF. Filter by department or Dept ID by selecting the **Data** tab and clicking **Filter**. Then select the column and filter you want to sort by.



## How to Read Department Status Reports

- Columns G and H have been recently added. **Column G** (Status) shows the status of this request. [Click here](#) for definitions of RAS Statuses and Comments. **Column H** (Expedited) shows when a transaction has received approval for expedited processing.

G	H
<b>Status</b>	<b>Expedited</b>
Active	N
Active	N
Active	Y
Active	Y

- Column I (OSR Recvd)** shows the date the complete request was received by the Sub Out Team in the [CGSubOutTeam@ucsf.edu](mailto:CGSubOutTeam@ucsf.edu) email.  
**Column J (Dept Req Sent)** if applicable, shows the date that the assigned Subaward Analyst requested information or documentation from the department.  
**Column K (Dept Req Complete)** shows the date the full complete request was received. If the request was complete at the time of submission to the [CGSubOutTeam@ucsf.edu](mailto:CGSubOutTeam@ucsf.edu) email, this date will be the same as the date in Column I.

**Column L (Sub Sent)** shows the date the agreement documents were sent to the subrecipient central research office for review and signature.





I	J	K	L
<b>OSR Recv</b> ▾	<b>Dept Req Sent</b> ▾	<b>Dept Req Complete</b> ▾	<b>Sub Sent</b> ▾
9/11/2015		9/11/2015	
10/29/2015			
10/22/2015		10/22/2015	10/27/2015
10/22/2015		10/22/2015	10/27/2015

- For more information on a specific subaward, navigate to Grants > UCSF Reports > Subrecipient Report by Dept.



- Take the 4 digit tracking number from Column E of the report and type it into the Subcontract # field. Select Run and click on the Subcontract #. NOTE: You must include SC at the end of the number.





### Subrecipient Report By Dept

Dept ID:    
 UCSF Award PI:    
 Award ID:   Business Unit: SFCMP  
 Subcontract #: **12345SC**  1  
 Subrecipient Institution: begins with   
 Sub PI Name: begins with   
 \*End Dt Status: All Subcontracts   
 ARRA Type:   
 Include Child Dept ID **Run** 2

Results							
UCSF Award ID	Fund	UCSF Project ID	Subcontract#	Subrecipient Institution	Subcontract Begin Dt	Subcontract End Dt	E
A123456	0000	123456A	<b>12345SC</b> 3	Research University	11/01/2015	01/31/2016	

- Comments field will show the date of entry, first initial and last name of analyst and a standardized descriptor of the subaward's current status. [Click here](#) for definitions of RAS Comments and Statuses.

**Subrecipient Subcontract**

Sequence: 10 Subcontract #  Status: Active  Location:  U.S.  International  
 Subrecipient:  Sub PI:  [Subrecipient Document Page](#)  
 Subrecipient ID:   University of Washington [ARRA Subrecipient Info Page](#)  
 Sub Contact:  Sub Phone:  Sub Email ID:   
 Scope of Work Start Dt:   UCSF OSR Analyst: Carpio, Feliciano M.  [Subrecipient Voucher Detail Page](#)  
 Scope of Work End Dt:   Total Estimated Budget: 17,106.12 Number of Budget Periods:   
 Comment: **11/5/15 ssharma - Basic review intake.**