

Reporting

PayCert has a library of reports to quickly provide you with accurate and specific data to help manage and monitor the certification process. This guide will help you find and generate the right report.

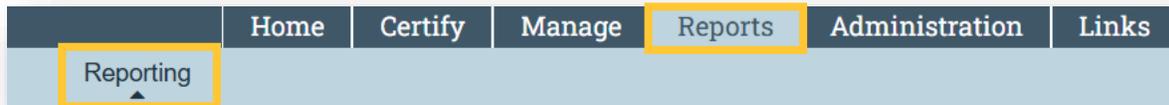
Every report has a different purpose, but many have parameters and options in common.

Accessing the Reporting Page

To access the Reporting page:

First, select **Reports** from the top navigator.

Then, select **Reporting** from the top sub-navigator.



The Reporting page is separated into different panels to allow you to find the right report and run it with the correct criteria. The panels are:

- Category — Quickly find the type of report you need.
- Reports — Show a subset of the reports within the category.
- Description — An explanation of the results you can expect from the selected report.

Reporting

This page lists all reports that are available through the application.

Category	Reports	Description
Commitments	Certifier Payroll Summary Report	
GMU Custom Reports	Payroll and Cost Share Report	
Management	Payroll Report	The Payroll Report is a payroll summary report for a specific individual, Department or Grant and date range.
Monitoring	PI and Staff Payroll Report	
Payroll/Cost Share	SPES (Sponsored Project Employee Summ...)	The date range for this can be set one of two ways. First, the report can be run by selecting a date range. This allows the user to run a report that crosses reporting periods but is more
	SPES Summary Report	

Right: [View Payroll Report on Reports Page](#)



Parameters, Results

- Each report also has additional tabs for:
 - Parameters — Set your search criteria.
 - Results — The results of your report.

Parameters
Results

Employee:

School / Department:

Expand Search

Account: Active Inactive

Search By Statement Type: IBS Non-IBS Other

Date By: Dates Employee Type

Dates: Start Date: End Date:

Run Report

Generating Reports

Reports are available to you depending on your roles and rights within PayCert, as well as any department relationships you may have. You can generate a report at any time, with any set of parameters. While there are many reports available, you may only use a few that are specific to your role.

To generate a report:

Find the category and click the name of the report. The description of the report will be displayed in the **Description** pane.

Reporting ?

This page lists all reports that are available through the application.

Category	Reports	Description
<ul style="list-style-type: none"> Commitments GMU Custom Reports Management Monitoring <li style="background-color: #e0e0e0;">Payroll/Cost Share 	<ul style="list-style-type: none"> Certifier Payroll Summary Report Payroll and Cost Share Report <li style="background-color: #e0e0e0;">Payroll Report PI and Staff Payroll Report SPES (Sponsored Project Employee Summ... SPES Summary Report 	<p>The Payroll Report is a payroll summary report for a specific individual, Department or Grant and date range.</p> <p>The date range for this can be set one of two ways. First, the report can be run by selecting a date range. This allows the user to run a report that crosses reporting periods but is more</p>
		Right: View Payroll Report on Reports Page



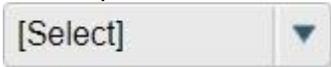
Set your desired report parameters in the **Parameters** tab. Depending on the report, you may have a few or many choices.

IMPORTANT NOTICE:

For all reports where there is a filter “Date By” with *Dates* and *Employee Type*, GMU will not be able to run the Employee Type Filter. Users will only be able to run the reports by Dates, which are the Reporting Period Dates.

Parameter Options

Button/Field	Function
<p>Arrow Button</p>	Select your parameter, then use the arrow button to move your parameter from left to right to add, or from right to left to remove.
<p>Double Arrow Button</p>	Move all parameter options from one panel to the other
<p>Text Search Field</p>	Begin by typing at least three letters of your desired search term. Your results will be displayed as you continue typing. For some searches you may be able to further refine your search to include sub-parameters, such as sub-departments, by clicking Expand Search .
<p>Check Box</p>	Select multiple parameters or items.

<p>Radio Buttons</p> 	<p>Select one item.</p>
<p>Date Picker Button</p> 	<p>Select a date. You can click a date from the picker or type a date in the field.</p>
<p>Informational Button</p> 	<p>Click to get more information about any parameter. Click again to close the hover information.</p>
<p>Drop-down Menu</p> 	<p>Select an option from the list.</p>
<p>Blank Field</p>	<p>If a field entry is not required, the field can be left blank. Leaving the field blank will act as a wild card, which will include all possible results. This can cause reports to be very large and take more time to generate.</p>

Once your parameters are set, click the **Run Report** button.



You may receive an error indicating that your report contains no data. To resolve this, re-check your parameters or widen your search criteria, then click **Run Report** again.

PayCert displays your report in the Results tab automatically.



TIP:

You can download your results in different file formats. Your file format options are displayed in the Results tab below the report data.



Viewing Reports

Reports provide you with specific data depending on the parameters you've set.

Once your report has been generated, you can use the data to keep track of the status of statements, payroll costs and hours, as well as system-wide settings and user information.

View Your Results

If your parameters return results, they will be displayed in the Results tab. Results will be specific to your search criteria. If you're missing data or if your date range is incorrect, go back to the Parameters tab and make changes, then run the report again.

Department Name	Description	Code	Create Date
Public Policy and Public Admin		M12764	2/11/25

Sort Your Results

Some reports can be sorted by clicking a column name. For example, to sort by employee name, click the Name column. By default the sort will be in descending order, alphabetical (A-Z). Clicking the column again will sort in ascending order, alphabetical (Z-A).

Name	User Name
Aaron, Noor - G01421972	naarohi
Aaronson, J Stephanie - G00109913	saaronso
Abando, D Jaime - G00888110	jabando

Name	User Name
von Schwanenfluegel, Matthias - G01583823	mvonschw
diaz, joe - G01366553	jdiaz36
del Castillo, Mariel - G01413641	mdelcas



Interactive Report Features

Some reports give you options to perform further actions, view more information, or edit data directly from the **Results** tab. Links and icons will appear in these columns. Click the link or hover over the icon to see what additional actions can be taken. These actions can only be taken within PayCert are not available from exported files.

Number	Name	Department	Start Date	End Date
0000	GMU Non-Sponsored Activity	000000 - NSP Department	01/01/2023	12/31/2040
203939P	NASA/Air Quality Modeling	Cntr Spatial Info Sci and System	07/18/2016	12/31/2024
204440P	NASA/ProbingRadiationPressure	Physics and Astronomy Department	01/26/2018	01/25/2026

Export Your Report

Any report can be exported as an Excel document, and some reports have an additional Formatted Excel option.

To generate an Excel document:

At the bottom of your Results page, click Excel. The Excel document will begin downloading.



Or:

If the report has the option, click Formatted Excel at the top of the Results page. The Excel document will appear in a new window.

Generate Alternate File Format Versions of Your Report

Most reports can be downloaded in other file formats, but most clients just export to Excel.

- Excel
- XMS
- RTF



To export a report in an alternate file format, select the corresponding file type at the bottom of your search results page.



Choosing the Right Report

Reports provide the necessary data for you to determine what tasks need to be completed, which users have certified or not yet certified, and many other data points.

Reports

Commitments

Report	Purpose
Commitments to Actuals Report	The Commitments to Actuals Report compares the Commitments on sponsored awards or contracts and the certified effort or hours on the same awards or contracts
Certifiers with Commitments and No Payroll	Query displays all certifiers that have a commitment to an award/account but do not have any payroll on the associated award/account for the reporting period.

Management

Report	Purpose
Project Status Report	<p>The Project Status Report displays a list of all project statements that have a specified status at the time the report is run. You must choose the status(es) to be included, date range, department or certifier. This report provides direct links to your statements.</p> <p>If you are a college administrator, or a primary effort coordinator with access to all departments in the rollup, you can enter your college in the department parameter to view all statements in your college.</p>
Project Status Report - Search by Period Start Date	<p>This is a Project Status Report for statements with a start date between two dates that are not in the following states - In Progress, Auto-Approved, No Certification Required</p> <p>This lists all statements in Pre Review, Ready for Certification or Certified states that you have access to but does not provide direct links to your statements.</p>
Project Status Report - Search by Certification Due Date	<p>This is a Project Status Report for statements with a due date between two dates that are not in the following states - In Progress, Auto-Approved, No Certification Required</p> <p>This lists all statements in Pre Review, Ready for Certification or Certified states that you have access to but does not provide direct links to your statements.</p>

Monitoring

Report	Purpose
Departments With No Primary Coordinators Report	Lists departments that are sponsored federal research but either do not have a Primary Department Coordinator assigned or have an inactive Primary Department Coordinator assigned.
Payroll Certification Statements Certified AFTER Due Date	Lists Payroll Certification Statements Certified AFTER Due Date
Payroll Certification Statements Certified AFTER Specific Due Date	Lists Payroll Certification Statements Certified AFTER Specific Due Date



Report	Purpose
Payroll Certification Statements Not Certified within 15 Days of Due Date	Lists Payroll Certification Statements Not Certified within 15 Days of Due Date
Payroll Certification Statements Not Certified within 30 Days of Due Date	Lists Payroll Certification Statements Not Certified within 30 Days of Due Date
Payroll Certification Statements Not Certified within 7 Days of Due Date	Lists Payroll Certification Statements Not Certified within 7 Days of Due Date
Payroll Certification Statements Not Certified within X Days of Due Date	Lists Payroll Certification Statements Not Certified within X Days of Due Date
Payroll Certification Statements that were Manually Certified	Lists Payroll Certification Statements that were Manually Certified
Payroll Certification Statements that were marked 'No Certification Required'	Lists Payroll Certification Statements that were marked 'No Certification Required'

Payroll/Cost Share

Report	Purpose
Certifier Payroll Summary Report	A list of an employee's accounts and payroll for a 12-month period
Payroll and Cost Share Report	Payroll and cost share transactions for a specific date range and individual
Payroll Report	Payroll information for a specific individual, department, or account within a date range
PI and Staff Payroll Report	List of all individuals who charge a Principal Investigator's account with their monthly salary charges
SPES (Sponsored Project Employee Summary) Report	List of all employees with salary charged to a specific account within a date range