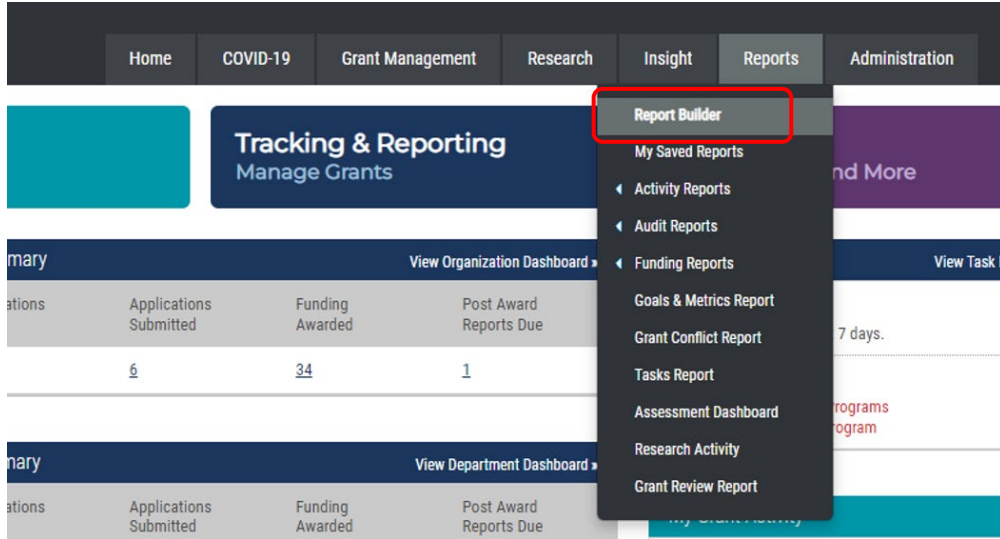




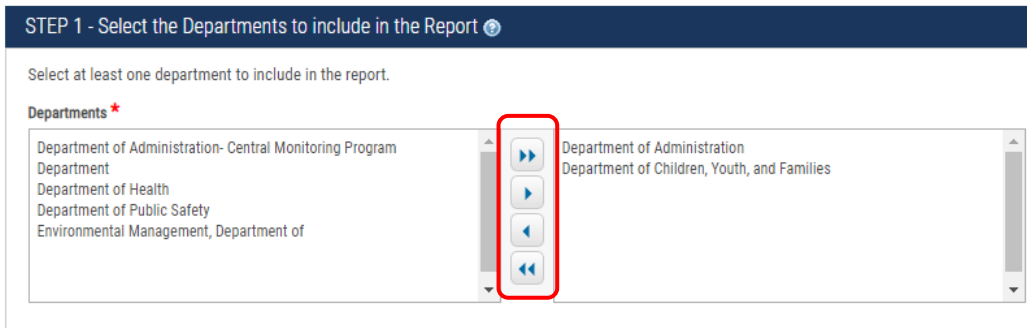
How to Use Report Builder

Report Builder gives you the ability to generate custom reports with data you need to meet your reporting and auditing needs.

To access Report Builder, hover over “Reports” and select “Report Builder”



Under *Step 1* select the departments you wish to pull into your report. Only departments that you are assigned to will show up as options. Use the blue arrows to move your selections. Note that you can select all available departments by clicking the double arrow.





Under *Step 2* you have the option to select report dates and additional filters. Use the blue arrows to make your selections.

STEP 2 - Select the Grants to Include in the Report

Select at least one item in any of the lists in this section, with the dates and date types being optional. If a Date type is selected, the grant stage list will be updated to only allow a stage matching the type of date to be used.

Report Start Date: 03/01/2018
Report End Date: 03/01/2022
Filter By Date Type: Grant Added Date
Clear Filter

Open Grants Closed Grants All Grants (Open & Closed)

Grant Type*

County/Regional	Federal
Foundation	Other
State	
Tribal	

Grant Stage*

Under Consideration	Will Not Apply
Award Projected	Will Not Pursue
Application Preparation	
Application Submitted	
Not Awarded	
Implementation	
Grant Awarded	
Funding Allocated	

Under *Step 3* you can choose from all data points in eCivis. Use the blue arrows to select which data points you want in your report, as well as which order you want them to appear in the Excel extract.

STEP 3 - Select the Data to Include in the Report

Select at least one data point from any of the lists in this section.

Data Points*

1. Choose from Grant Identification Data	GN Grant Code	Grant Title
2. Choose from Application Data	Funding Agency	CFDA
3. Choose from Award Data	Funding Office	Application Submitted Date
4. Choose from Task and Report Data	Grant Contact	Award Type
5. Choose from Budget Data	Funding Opportunity Number	Current Month Expenditures to Date
	Federal Award ID Number	
	State ID	
	Grant Type	
	Other Grant Type	
	Grant Tags	

Grant Identification Data – Information that describes the funding opportunity and its project association

Application Data – Information regarding the application submitted by your organization

Award Data – Information about the grant as awarded to your organization


Task and Report Data – Information about the number and status of tasks and reports assigned to the grant

Budget Data – Information regarding expenditures, cost shares, indirect/direct costs, and balances associated with the grant



To run the report as is, select “Generate Report.” If this is a report that you would like to run in the future, select “Save Report Settings.” The clear the form and start over, select “Reset Form”

Sample report output looks like this:



Grant Report

Report Criteria
Departments: Department of Administration, Department of Children, Youth, and Families
Grant Status: Open Grants
Grant Type: Federal, Other
Grant Stage: Will Not Apply, Will Not Pursue
Reporting Period: 03/01/2018 - 03/01/2022
Reporting Period Date Type: Grant Added Date

Grant Title	CFDA	Application Submitted Date	Award Type	Current Month Expenditures to Date
US16691 COVID-19 Telehealth Program - FY 2021	32.006			
US16055 State Health Insurance Assistance Program (SHIP) Base Grant - FY 2020	93.324			

If you choose to save your report settings, you will need to provide a name for the report and a brief description. Hit Save.

Save Report Settings

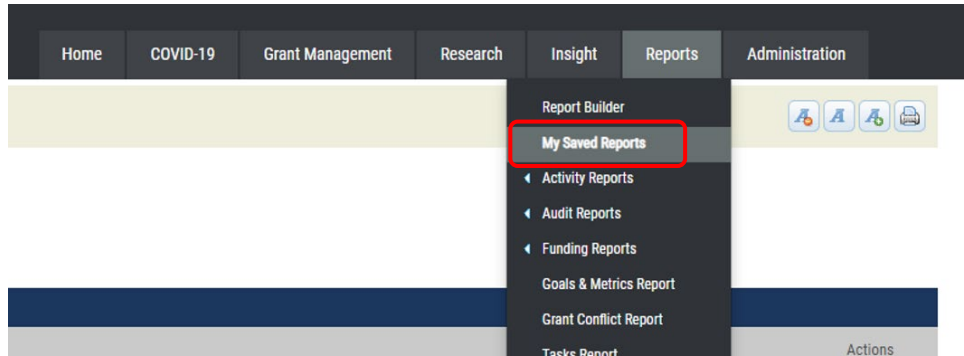
Name*:

Description*:

419 Characters Left



To access your saved reports, hover over “Reports” tab and select “My Saved Reports”



All reports you have previously created and saved will be listed here.

My Saved Reports

[Create New Report](#)

Saved Reports			
Number	Report Name	Last Updated	Actions
1	Sample Report Sample Report from Report Builder	11/18/2021	
2	Upcoming Application Due Dates List of grants that have upcoming application due dates that need to be submitted	03/11/2022	

Available Actions include:

Run Report – This will run and export your report into an Excel file using the most current information entered in eCivis.

Edit Report – This will bring you back into Report Builder with your current field selections. You can add/edit/delete fields as needed. When all updates have been made, select “Save Report” at the bottom of the page.

Delete Report – This will delete the saved report from your list