



eCivis

GRANTS NETWORK
Enterprise Reporting

Training Outline

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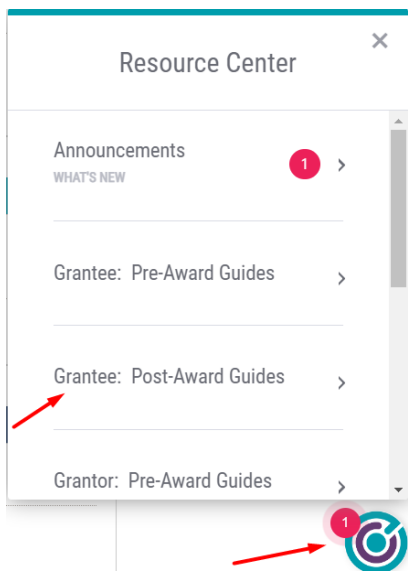
Introduction

This training manual will detail the reports and features available through eCivis' Grants Network. There are user guides within the application for Grantee and Grantor modules. This user guide will walk you through how to access the in-application guides, as well as, the new Enterprise Reporting functionality available to the State of Rhode Island.

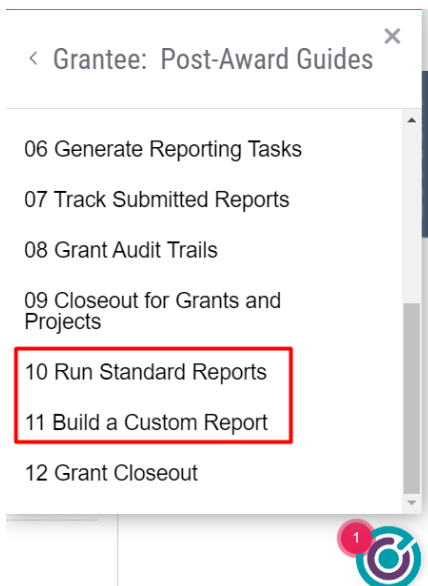
Accessing "Grantee" Report Guides

To access the user guide "State as a Grantee" Reports

1. Click on the eCivis icon then select "Grantee: Post- Award Guides":



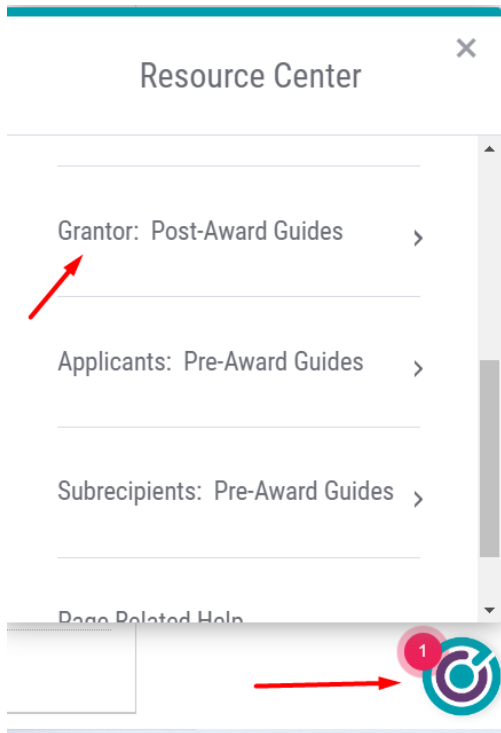
2. Sections 10 and 11 of the user guide provide instructions on how to access the standard reports and report builder:



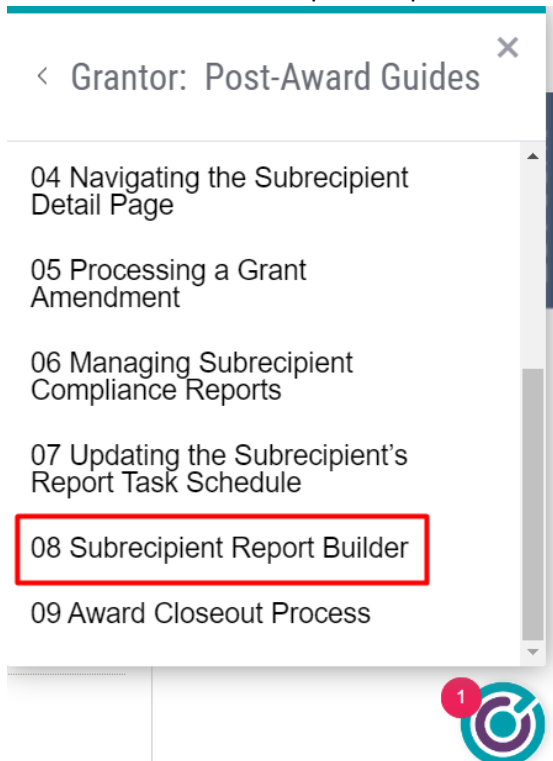
Accessing “Grantor” Report Guides

To access the user guide for “State as a Grantor” Reports:

1. Click on the eCivis icon then select “Grantor: Post-Award Guides”:



2. Select section 08: Subrecipient Report Builder:



Accessing Enterprise Reporting

Steps:

1. From the Homepage select the yellow “Enterprise Reporting” button

The screenshot shows the eCivis homepage dashboard. At the top, there is a navigation bar with the eCivis logo on the left and a user greeting: "Hello eCivis Customer Success Manager, your License is provided by State of Rhode Island". To the right of the greeting are links for "Help / Training" and "Logout". Below the navigation bar is a menu with buttons for "Home", "COVID-19", "Grant Management", "Research", "Insight", "Reports", and "Administration". The main content area features four large colored buttons: "Research Find Grants" (teal), "Tracking & Reporting Manage Grants" (dark blue), "Insight Best Practices and More" (purple), and "Enterprise Reporting Data and BI Intelligence" (yellow). A red arrow points to the "Enterprise Reporting" button. Below these buttons are two summary cards. The "Organization Activity Summary" card has a table with columns: "Open Projects", "Applications Due", "Applications Submitted", "Funding Awarded", and "Post Award Reports Due". Below the table is a "Loading..." indicator. The "My Action Items" card has a "View Task List" link and a table with one row: "1 | 98.012: Grant Program Name (eCivis DEMO)". Below this table is a "Tasks (Next 7 Days)" label.

NOTE: What if I don't have access?

- If you do not have access to Enterprise Reporting contact the [Grants Management Office](#) to request access.

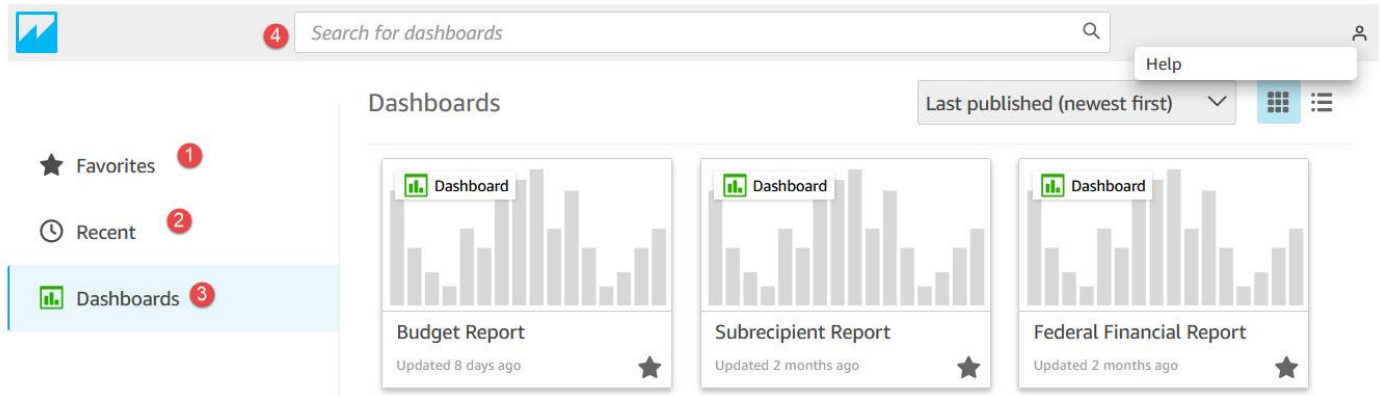
Enterprise Reporting Homepage

Features:

Grants Network: Enterprise Reporting

Welcome to eCivis Enterprise Reporting, Discover hidden insights from your data and make better data-driven decisions. Get ready to connect and scale all your data within the Grants Network infrastructure and visualize that data with interactive dashboards.

The new Enterprise Reporting from eCivis empowers you to gain insights from your grant management data and better understand its impacts on your organization.



1. **Favorites** – This section will list the reports that have been marked with a “Star” (distinguished by a filled in star)
2. **Recent** – This section will list the reports you have recently viewed
3. **Dashboards** – This section will list all available reports based on your access level
4. **Search** – Enter keywords into the search bar to search available reports

Reviewing and Exporting Reports

Report Features:

1. Filter Options:

- a. Departments – limit data by specific department(s)
- b. Project Name – limit data by specific project(s)
- c. Grant Name – limit data by specific grants(s)

The screenshot shows the 'BUDGET ANALYSIS' report interface. At the top, there are three filter dropdowns: 'Department of extGrantID' (set to 'All'), 'Project Name' (set to 'All'), and 'Grant Name' (set to 'All'). To the right, it displays 'Data Last Refreshed (ET)' as '2022-10-13 07:00:00.000'. Below the filters is a 'Grant Budget Summary' table with columns: RIGID, Budget Category, GL Code, Cost Center, and Dollar Amount. The table lists categories like 'All Other Contracted Professional Services', 'CONSTRUCTION', 'CONSULTANT PROFESSIONAL SERVICES', and 'CONTRACTUAL'. A context menu is open over the table with options: 'Hide +/- buttons', 'Export to CSV', and 'Export to Excel'.

2. **Using Filters** – when using a filter, you can search for specific entries or scroll to select the desired data

3. **Refresh Date** – this is the last time data was refreshed for the report (note: if no refresh date is provided, the default data refresh is every 2 hours)

This screenshot shows the 'BUDGET ANALYSIS' report with a search filter applied. The 'Department of extGrantID' dropdown is open, showing a search bar with 'Search value' and a list of departments: 'AG - Criminal', 'ARTS - Council on the Arts', 'BHDDH - Behavioral Healthcare', and 'CRMC - Coastal Resources Management Council'. The 'Data Last Refreshed (ET)' is '2022-10-13 07:00:00.000'. A table with 'Cost Center' and 'Dollar Amount' columns is partially visible below the department list.

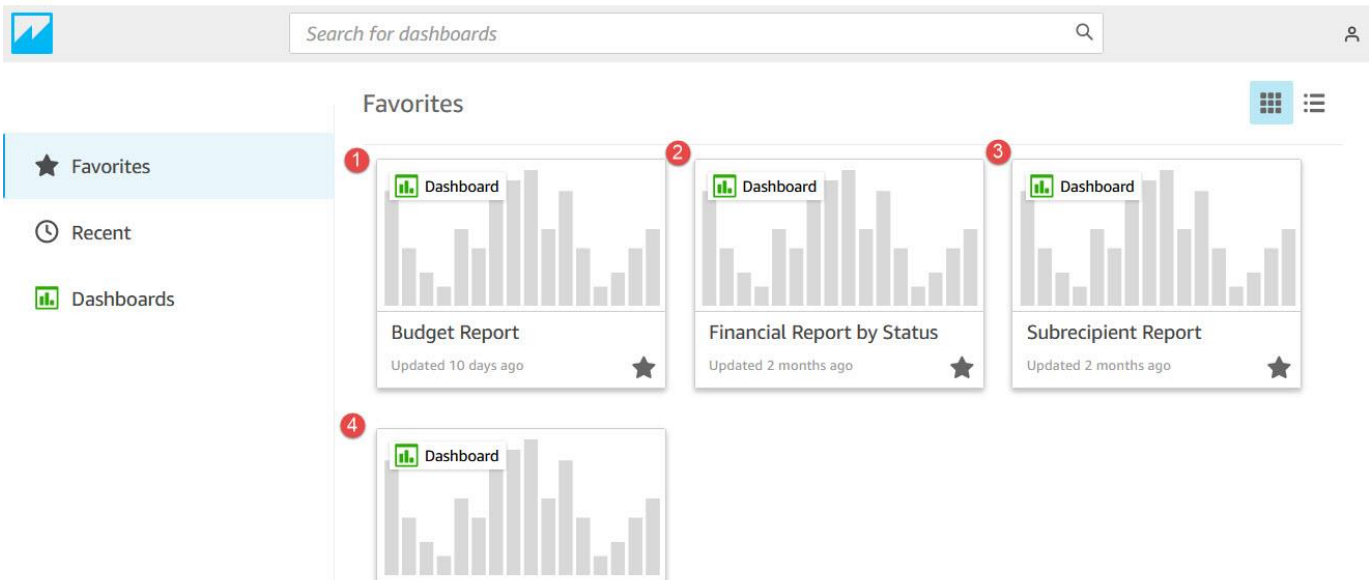
4. **Export** – use this option to export data into an excel or csv file. Click the 3 dots at the top righthand corner of the table you want to export and select “Export to Excel”

The screenshot shows the 'Budget Analysis Report' table with columns: Department of extGrantID, CFDA, FAIN, grantName, projectName, and extGrantID. The table contains multiple rows of data for 'Underground Storage Tank Prevention Fiscal Year 2021'. A context menu is open at the top right of the table with options: 'Hide +/- buttons' and 'Export to Excel'.

Available Enterprise Reports

Report Descriptions:

1. **Budget Report** – This report provides transaction-level revenue and expenditure data from RIFANS against an awarded grant budget. In addition to the standard filters, you can expand/collapse the RIGID, Budget Category, GL Code, and Cost Center columns to see expenditures at various budget levels.
2. **Financial Report by Status** – This report provides you with the status of all subrecipient financial reports (payment requests) for the selected departments, programs, and/or subrecipients. Data includes:
 - a. Main dashboard of reports by status (this will update the summary numbers when a status is selected).
 - b. Detailed financial report information for export
 - c. Days elapsed for pending financial reports
3. **Subrecipient Report** – This report provides a summary of contact information and award data for specific subrecipients. This also provides a list of subrecipient awards with a “Null” value in the Subrecipient Name field, highlighting subawards that will require an update to ensure subaward payments are processed and subrecipient data is accurate/consistent across GMS.
4. **Federal Financial Report** – This report summarizes funding expended by the state for internally managed projects (this does not include funds expended by subrecipients).



Commonly Requested Reports and Where to Find Them

Refer to the **eCivis Reports Summary Table** for a list of reports and how to access them. The following are a few starting points for finding reports on specific data/levels:

1. For transaction level detail (actual expenditures): Navigate to Enterprise Reporting and select “Budget Report.”
2. For federal award budget detail (a specific grant): Navigate to the grant budget and click the export icon.
3. For subaward/subrecipient summary data: Navigate to Enterprise Reporting and select “Subrecipient Report.”
4. For subaward program funding sources: Navigate to Subrecipient Management and click “Generate Funding Source Report.”
5. For status of subrecipient tasks, including invoices/payment requests: Navigate to:
 - a. Subrecipient Management and click “Generate Task Report” and filter as needed; and/or
 - b. Enterprise Reporting and select “Financial Report by Status” (for invoice/payment requests only).
6. For subrecipient progress on goals/subgoals (a specific subaward program): Navigate to Program Detail and click Subrecipient Reporting, then “Activity Report.”
7. For applicant data (a specific subaward program/solicitation): Only users with access to the applicable Zengine application workspace can export data.
8. To complete an SF-425 and/or report on SF-424 categories: Starting points (additional data may be needed) - navigate to:
 - a. Grant budget and click the export icon; and/or
 - b. Enterprise Reporting and select “Federal Financial Report” (filter for the grant, and scroll down past “no data” section).
9. To complete FFATA reporting: Starting points (additional data may be needed) - navigate to:
 - a. Enterprise Reporting and select “Subrecipient Report” AND
 - b. Users with DMAH permissions can view executive compensation data in the Annual Organization Registration.

Appendix 1: eCivis Reports Summary Tables

In eCivis, most reports are available under the **Reports** menu, with additional reports available on specific screens. These tables are designed to help you find the data you need - in CSV, Excel, or dashboard format.

eCivis Reports Summary Table 1 - Specialty Reports

Report Title	Grantee or Grantor	Level				Target User Group				Description/ Use/ Purpose	Features	Navigation
		Dept (by permissions)	Federal Grant	Subaward Program	Subaward/ Subrecipient	Program Staff	Fin Staff	Agency Leadership	A&C/ OMB			
Grant Budget Export	Grantee		X			X	X			Budget detail report for the individual federal award, with expenditures by line item. See AWS Budget Report for transaction level detail.		On Project Dashboard, click Budgets tab, then spreadsheet icon (top right corner)
Grantee - Build Your Own	Grantee	X	X							Generate summary reports on federal awards for your department(s).	Parameter Input Options	Reports > Report Builder
Budget Report	Grantee	X	X			X	X			RIFANS transaction level detail, plus federal award budget info. Use for reconciliation. Includes revenue and uncategorized transactions. GMS does NOT include accruals.	Filtering	Reports > Enterprise Reporting
Federal Financial Report	Grantee		X			X				Pick 1 grant, scroll down past "no data" section. Useful if you need to report on SF-424 budget categories to feds. (Does not include revenue or uncategorized transaction data. Caution: Bar chart mixes federal and match transactions.)	Filtering, Dashboard	Reports > Enterprise Reporting
Funding Source	Grantor	X		X			X	X	X	Use for program level data, not subrecipient level data. Reference when budgeting.	Parameter Input Options	Grant Management > Subrecipient Management
Task (rollup or detail)	Grantor	X		X		X	X	X (rollup)	X (rollup)	Make selections to narrow to areas of interest. Rollup shows last approval for each task (1 row/task). Detail includes a separate row for each approver.	Parameter Input Options	Grant Management > Subrecipient Management
Subrecipient Report	Grantor	X		X	X	X	X			Use to identify subrecipients not linked to RIFANS. Can be used for FFATA reporting, with limitations.	Filtering, Dashboard	Reports > Enterprise Reporting
Financial Report by Status	Grantor	X		X	X	X	X		X	Detail on payments to subrecipients.	Filtering, Dashboard	Reports > Enterprise Reporting
Subrecipient Report	Grantor			X	X	X	X			Quick snapshot of subaward data within a program - funding and match info, perf periods, etc. Can be used for populating subawards.		On Program Detail Page, click Subrecipient Reporting
Budget Report	Grantor			X						Aggregated data at budget category level. Recommend using AWS instead.		On Program Detail Page, click Subrecipient Reporting
Activity Report	Grantor			X	X	X				Use for federal reporting, if using goal/subgoal functionality.		On Program Detail Page, click Subrecipient Reporting (Note: Only shown if using goals/metrics)
Zengine Application Reports - Build Your Own	Grantor			X		X				Use during application/review process, and for issuing subaward agreements.	Select & Arrange Columns	User must have access to the Zengine workspace for that grantor program/solicitation

In eCivis, most reports are available under the **Reports** menu, with additional reports available on specific screens. This table is designed to help you find the data you need - in CSV, Excel, or dashboard format. Report names in **bold** are expected to be the most commonly used. Members of a user group may find other (not checked) reports to also be useful.

[If you've reviewed these tables and still have questions, contact GMO Support.](#)

eCivis Reports Summary Table 2 - Standard Reports

Report Title	Grantee or Grantor	Level				Target User Group				Description/ Use/ Purpose	Features	Navigation	
		Dept (by permissions)	Federal Grant	Subaward Program	Subaward/ Subrecipient	Program Staff	Fin Staff	Agency Leadership	A&C/ OMB				
Activity Reports - Apps Submitted	Grantee	X						X			Pulls by Department the summary of applications submitted and relevant information	Parameter Input Options	Reports > Activity Reports > Apps Submitted
Activity Reports - Closed Projects	Grantee	X									Information on Projects that have been closed and archived in eCivis	Parameter Input Options	Reports > Activity Reports > Closed Projects
Activity Reports - Grants Awarded	Grantee	X					X	X			Summary info of all awarded grants in Rhode Island at the Organization level and by Department (not automatically exported)	Parameter Input Options	Reports > Activity Reports > Grants Awarded
Activity Reports - Grant Closeout	Grantee	X						X			Information for all Grants that have been closed out	Parameter Input Options	Reports > Activity Reports > Grant Closeout
Audit Reports - File Library	Grantee	X	X								Not a downloadable report - in Grants Network, shows all files that have been uploaded by Department, Project, and Grant (Grantee only. Excludes files uploaded to subawards.)	Parameter Input Options	Reports > Audit Reports > File Library
Audit Reports - Spending Report	Grantee	X	X						X	X	Summary information of Spending Reports that have been submitted to feds on the Grantee side at the Organization level and by each Department	Parameter Input Options	Reports > Audit Reports > Spending Report
Audit Reports - Not Awarded Report	Grantee	X							X	X	By Department pulls a list of grants that had applications submitted but were not awarded, along with the reasons they were not awarded	Parameter Input Options	Reports > Audit Reports > Not Awarded Report
Audit Reports - Budget Revision Report	Grantee		X			X	X				Can only pull one grant at a time, shows who, when, and what revisions were made to the		Reports > Audit Reports > Budget Revision Report
Funding Reports - Allocations	Grantee	X					X				Information based on all grants made available for allocation during a selected reporting period	Parameter Input Options	Reports > Funding Reports > Allocations
Funding Reports - Annual Comparison	Grantee	X							X	X	Information based on all grants designated as awarded or not awarded during the reporting period chosen (choose 2 calendar years)	Parameter Input Options	Reports > Funding Reports > Annual Comparison
Funding Reports - Comp vs. Non-comp	Grantee	X					X	X			Information based on all grants designated as awarded or not awarded during the selected reporting period (% only, no \$)	Parameter Input Options	Reports > Funding Reports > Comp vs. Non-comp
Funding Reports - Funding Source	Grantee	X							X	X	Number of Awards and Award Amounts being granted to Rhode Island by each Federal Funding Agency	Parameter Input Options	Reports > Funding Reports > Funding Source
Funding Reports - Match vs. Award	Grantee	X					X	X		X	Summary of Match data (by in-kind and cash) for awards by Department and at Organization level	Parameter Input Options	Reports > Funding Reports > Match vs. Award

eCivis Reports Summary Table 2 - Standard Reports

Report Title	Grantee or Grantor	Level				Target User Group				Description/ Use/ Purpose	Features	Navigation
		Dept (by permissions)	Federal Grant	Subaward Program	Subaward/Subrecipient	Program Staff	Fin Staff	Agency Leadership	A&C/OMB			
Funding Reports - Projected vs. Awarded	Grantee	X								Information at the organization level and at each department level of the projected number vs awarded number of grants and total amounts, along with match	Parameter Input Options	Reports > Funding Reports > Projected vs. Awarded
Funding Reports - Win Rate	Grantee	X							X	Number of applications submitted vs the number that was awarded	Parameter Input Options	Reports > Funding Reports > Win Rate
Goals & Metrics Report	Grantee	X	X			X			X	More of a visual report with graphics for summary goals & metrics. Can be pulled for specific grants and projects or at the organization level	Parameter Input Options	Reports > Goals & Metrics Report
Grant Conflict Report	Grantee	X							X	Pulls the names and information of grants that have been assigned to 2 different projects	Parameter Input Options	Reports > Grant Conflict Report
Tasks Report	Grantee	X	X			X	X		X	Task information (on agency user tasks associated with federal awards) can be pulled by Department, Project, Grant, or all with relevant Dashboard view in Grants Network but can also be exported to a CSV file. Shows the overall "health" of the grants in your organization based on Files, Spending and Performance, and can be filtered by various fields, including Tags .	Parameter Input Options	Reports > Tasks Report
Assessment Dashboard	Grantee	X	X						X	User information including how many times they have logged in, reviewed/saved/routed federal funding opportunities, etc. DMAH's can see users for their Departments, OMAH's can see all Rhode Island users	Parameter Input Options	Reports > Assessment Dashboard
Research Activity Report	Grantee	X							X	Allows you to see which users have sent federal funding opportunities to colleagues to review through the eCivis system	Parameter Input Options	Reports > Research Activity Report
Grant Review Report	Grantee								X		Parameter Input Options	Reports > Grant Review Report

In eCivis, these **Standard Reports** are available under the **Reports** menu, with additional reports available on specific screens.

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