Status Summary by Report Group and
Status Summary by Account-Report Group
Tips for Setting up Report Groups

PIs, Administrators and Lab Managers wanting a snapshot of centers grouped together for a particular purpose will find these two reports useful to monitor their spending.

Report Groups are set up in the Budget Module of DMS. Centers may be grouped into Report Groups for PI reporting purposes (ex. PI wants to see all RO1 grants reported together). Like the other reports containing the Remaining Balance calculation, this report may prompt a PI and business officer to re-budget and/or alter spending with the knowledge that a center appears to have a low or negative Remaining Balance.

How to Create a Report Group in the DMS Application
Report Groups are user-specified groups of centers. A center may only be in three report groups. Please do not delete an existing report group on a center that has already been created because Report Groups are shared editable fields. Users with access to a center's Budget in DMS (with Encumbrance Departmental Admin or Encumbrance Initiator roles) may edit Report Groups.

Steps to creating a Report Group:
1) Open the DMS Web Application and select "Manage Budget."
2) Search for a center.
3) Open the center's budget.
4) Determine a name for your report group and enter it into one of the three report group fields. **These entries are case sensitive**. The groupings of centers on reports are more meaningful when report groups entered into DMS are consistent. When a report is run by report group, DMS will look for the exact same entry in the web application. If there is any variation, those centers with the slightly different report group entry will not be returned in the reporting results. The report will return results found in all three report group fields.
5) Click SAVE

Report Group Examples

You may find the following suggestions helpful when considering report groups for your budgets. However, there are many ways you can setup report groups to meet your area's needs. These suggestions are meant as a guideline to help you set up your report groups.

Report Group 1	Report Group 2	Report Group 3
Center groupings by Center Responsible Person (such as PI) and status or fund type.	Center groupings by department/division/lower level department fund types or status or by sumto centers. It is best to use a short departmental prefix in addition to the more generic descriptor to eliminate duplication between departments and to aid in the selection of reports groups from the List of Values (LOV).	Detailed grouping such as by lab managers, local administrator or other miscellaneous groupings of centers.
CRP Last Name-Open example Mays-Open	Sumto Center:	MEDEN-Lab Manager
CRP Last Name-Closed example Mays-Closed	MEDEN4	MEDEN-Lab Manager-Federal
CRP Last Name-fsr-p example Mays-fsr-p	Department, Division, Lower Level Department:	MEDEN-Lab Manager-Non-Federal
CRP Person Last Name-fsr-c example Mays-fsr-c	MEDEN-Chair	MEDEN-Lab Manager-Clinical Trials
CRP Last Name-Restricted example Mays-Restricted	MEDEN-Operating	
CRP Last Name-Federal example Mays-Federal	MEDEN-Unrestricted	
CRP Last Name-Non-Federal example Mays-Non-Fed	MEDEN-Restricted	MEDEN-Admin Responsible Person
CRP Last Name-Gifts example Mays-Gifts	MEDEN-Federal	MEDEN-Admin Responsible Person-Unrestricted
CRP Last Name-Development example Mays-Dev	MEDEN-Non-Federal	MEDEN-Admin Responsible Person-Federal
	MEDEN-Gifts	MEDEN-Admin Responsible Person-Non-Federal
	MEDEN Open	MEDEN-Admin Responsible Person-Gifts
	MEDEN Closed	MEDEN-Admin Responsible Person-Clinical Trials