OSR Invoice Listing Report

About this Document

This document explains the OSR Invoice Listing Report, which uses the SAS Web Report Studio reporting tool. This document also explains the key navigation features of SAS Web Report Studio. For additional information about SAS Web Report Studio navigation, see Running Reports using SAS Web Report Studio.

Overview of the Invoice Listing Report

- Shows all invoices that have been processed through the ConnectCarolina billing system for OSR for a given project, contract, sponsor, or principal investigator.
- Based on actual, posted transactions to the general ledger.
- Shows all invoices created in the system since go-live on October 1, 2014.
- Invoices prior to October 1, 2014 were billed from other systems, so you’ll need to check with OSR on those if you have questions.
- This is a SAS Web Report Studio report in InfoPorte located on the OSR Campus Reports tab.

Steps - OSR Invoice Listing Report

Follow these steps to run the OSR Invoice Listing Report:

1. Open InfoPorte and navigate to:
   
   Finance > Grants > OSR Campus Reports

2. Select the OSR Invoice Listing Report.

3. Click the Reset to Default link in the top right corner. You should do this every time you run the report to clear out filters from previous runs.
4. In this example, we will search by project. Scroll down to the **Project** filter.

5. Click the magnifying glass to select a project.

6. Select the operand you want. In this example, we use **Starts with**.

7. Enter the value you want. In this example, we enter **503041**.

8. Click the **Search** button.

Result: The values that begin with 503041 appear in the search pane.

9. Select the value you want.

10. Click the single arrow.

11. Click the **Select** button.
Results: The project appears in the **Selected** pane of the Project filter.

12. Click the **View Report** button.

Results: The system displays the search results, which include: the invoice number and date, sponsor information, project ID, and invoice amount.
### Working with the report data

To work with the data from the online view, right-click in any cell. A menu appears with options for viewing and working with the data, such as sorting and exporting.
Refreshing the Page

Once you've run the report and want to refresh the page to run it again with a new set of data, click Data > Refresh Data from the top toolbar.

You can also close and print the report from the File menu.