Running the OSR Contract Closeout Report

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Purpose of the Report

The OSR Contract Closeout Report shows the contract data needed to close out contracts. The report contains all contracts and their associated projects regardless of status. You can run the report for all contracts, or filter for specific contracts by contract number, contract end date, project end date, or contract status.

This report is a SAS report. For more information on working with SAS reports, see *Running SAS VA Reports , page 1.*

Who Uses This Report

Primarily, staff in the Office of Sponsored Research use these reports when closing out a contract.

When to Use This Report

This report is best used during the contract or award closeout process to ensure all closeout checklist items have been completed successfully.

Where the Information Comes From

This report pulls information such as the start and end dates of contracts and the status of the project from the ConnectCarolina grants module. The report pulls the expenses from the General Ledger Actuals ledger.

How to Run the Report

Follow these steps to run the OSR Contract Closeout Report:

1. Open InfoPorte and choose this menu option:

   Finance > OSR Financial Reporting > OSR Contract Closeout Report

   Result: The system displays the OSR Contract Closeout Reportwith filters for business unit, contract and project end dates, contract number, and contract status.

2. Click one of the filter buttons to search by business unit, contract and project end dates, contract number, or contract status

   Note: In this example we search by Contract ID.

Business Unit	Contract and Project End Dates	Contract Number	Contract Status

3. Type the **Contract Number** and press the **Enter** key.

Contract and Project End Dates	Contract Number	Contract Status

Contract Number

A00-0001-001

Contract Number

☐ A00-0001-001	1	
☐ A00-0002-001	7	
☐ A00-0003-001	1	
☐ A00-0004-001	3	
☐ A00-0005-001	30	
☐ A00-0006-001	2	
☐ A00-0007-001	1	

4. Check the box beside the **Contract Number**.

ct End Dates	Contract Number	Contract Status

Contract Number

A00-0001-001

Contract Number

☑ A00-0001-001	1

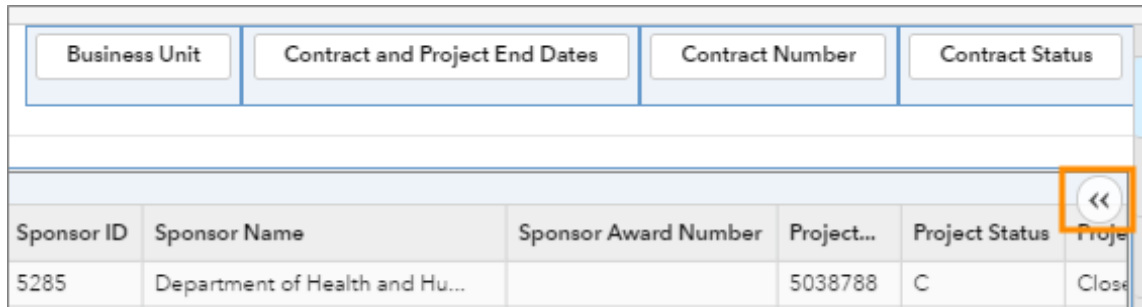**Result:** The system displays all the rows matching your search criteria.

OSR Contract Closeout report

Contract Number ▼	Contract Start D...	Contract End D...	Contract Status	Bill Type ID
A00-0001-001	Jul/01/2006	Jun/30/2007	CLOSED	LOC

Exporting to Excel

To export search results to Excel, do this:

1. Click on any row in the search results.

   Result: The system displays a double arrow in the upper right-hand corner of the search results.
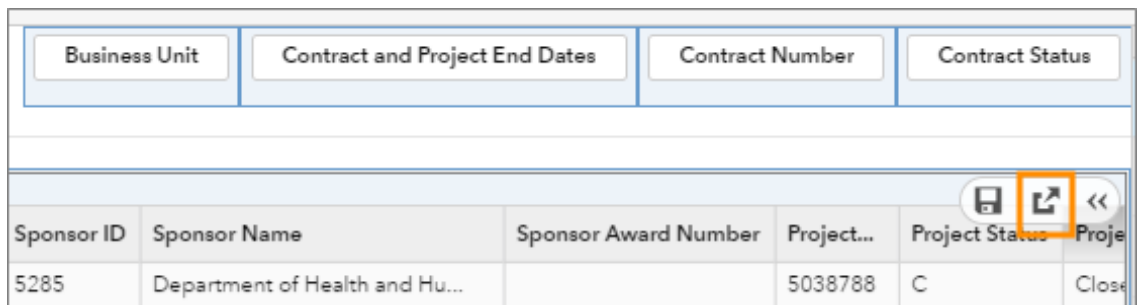

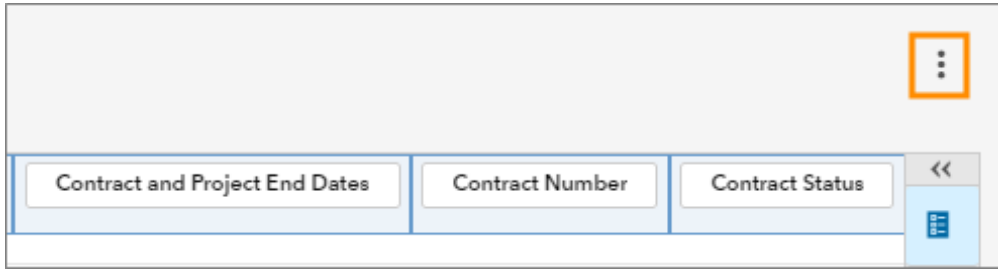2. Click the double arrow and then click the **Export Data** button.

3. Choose the report criteria you need.

4. Click **OK**.

   Note: Excel downloads don't work well in Internet Explorer. If you have problems downloading the report, save the file before opening it.

Refreshing the Page and Printing

Once you've run the report and want to refresh the page to run it again with a new set of data or print the report, do this:

1. Click the three dots in the top right-hand corner of the screen.

2. Choose **Refresh Report** or **Print**.