

Quick Reference Guide:

How to Run the PPM Project Report



Purpose:

The PPM Project Report will give Project Managers, Project Participants, and/or Financial Analysts access to project level period and year-to-date information for their Non-Sponsored and Sponsored Projects.

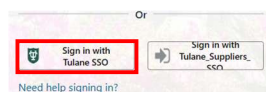
REQUIREMENT: To view data, users must have the Project Manager, Project Participant or Financial Analyst role. To obtain one of these roles, please submit a WaveWorks Service Now Access request including the data level needed to receive.

Step-by-Step:

Log into Gibson and click on WaveWorks Analytics & Reports link.



Use Tulane's SSO to sign in.



Click on the Navigator.



This is in the upper left hand of the screen.

Click on Catalog.



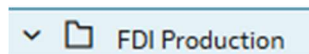
Click on Shared Folders.



Click on Custom.



Click on FDI Production.



Open the Report.



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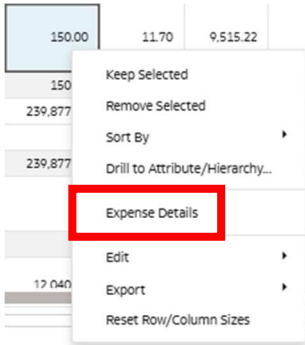
Make selections from available search filters.
Click apply to apply the filter selection.

Fiscal Year 2027	Project Manager All	Project Number All	Project Status All	Award Number All
Fiscal Period All	Project Organization Name All	Project Name All	Direct/Indirect All	Sponsored / Non-Sponsored All
Apply				

Review/Export the data.



Drill to transaction level data by right clicking on the amount and choosing Expense Details.



Project Current Activity Tab:

The Proj Current Activity Tab will show a high-level summary including balances and commitments for Projects.

The table on the left will show the following information:

The Award Number	The Award Number associated with the Project Non-Sponsored Projects will show No Value
Project Number	The number of the Project including project prefix
Expenditure Category	The high-level category, i.e. Salary, Fringe, Supplies & Expenses, etc.
Current Budget	Shows the current budgeted amount of the Project Non-Sponsored Projects will not have a budget unless they are provided to the PPM Office Budgets are for the life of the Project not year to date

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Actuals	Shows the total of all Project Expenses inception to date
Committed Cost	The total of encumbrances on the Project
Balance	Shows the available balance of the category line The remaining balance of the Project will be reflected in the Balance Total Row This balance will reflect the Budget minus Actuals minus Committed Costs

The table on the right will show the following Commitment information:

Project Number	The number of the Project including project prefix
Commitment Type Name	This is where the commitment comes from Currently only Purchase Orders will create a commitment
Commitment Number	The Purchase Order number
Creation Date	The creation date of the Commitment
Commitment Line Number	The line number of the Purchase Order that corresponds with the commitment
Commitment Description	The line description from the Purchase Order
Committed Cost	The amount of the commitment



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PPM Project Dashboard:

The PPM Proj Dashboard shows three views of a project Direct & Indirect Expenses- ITD, Expenses- ITD, and Direct & Indirect Expenses-YTD. See below for an explanation of each.

The Direct & Indirect Expenses ITD (Inception to Date) table on the PPM Proj Dashboard will show the financial information for a project's inception-to-date with a breakout for direct and indirect expenses for the following information:

Project Number	The number of the Project including project prefix
Project Name	The name of the Project
Project Manager	The owner of the Project, i.e. the PI responsible for the account
Project Status	The Status of the project, i.e. Active, Closed, etc.
Project Organization Name	The Cost Center where the Project lives
Award Number	The Award Number associated with the Project Non-Sponsored Projects will show No Value
Sponsor Name	The Sponsor of the Project Non-Sponsored Projects will show No Value
Project Start Date	The start date of the Project
Project Finish Date	The end date of the Project Some Non-Sponsored Projects will not show an end date
Direct/Indirect	Reports if the value is direct or indirect cost



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Current Budget	Shows the current budgeted amount of the Project Non-Sponsored Projects will not have a budget unless they are provided to the PPM Office Budgets are for the life of the Project not year to date
Expenses-ITD	Shows the total of all Project Expenses inception to date
Budget-Actuals	Shows the Budget minus Actuals (Expenses-ITD)
Revenue, Salary, Fringe and Expense Categories	Shows the amounts paid for each category inception to date on the Project

The Expenses ITD table on the PPM Proj Dashboard tab will show the financial information for a project's inception-to-date without a breakout for direct and indirect expenses for the following information:

Project Number	The number of the Project including project prefix
Project Name	The name of the Project
Project Manager	The owner of the Project, i.e. the PI responsible for the account
Project Status	The Status of the project, i.e. Active, Closed, etc.
Project Organization Name	The Cost Center where the Project lives
Award Number	The Award Number associated with the Project Non-Sponsored Projects will show No Value
Sponsor Name	The Sponsor of the Project Non-Sponsored Projects will show No Value
Project Start Date	The start date of the Project



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Project Finish Date	The end date of the Project Some Non-Sponsored Projects will not show an end date
Current Budget	Shows the current budgeted amount of the Project Non-Sponsored Projects will not have a budget unless they are provided to the PPM Office Budgets are for the life of the Project not year to date
Committed Cost	Encumbrances
Expenses-ITD	Shows the total of all Project Expenses inception to date
Budget-Actuals	Shows the Budget minus Actuals (Expenses-ITD)
Revenue, Salary, Fringe and Expense Categories	Shows the amounts paid for each category inception to date on the Project

The Direct & Indirect Expenses YTD table on the PPM Proj Dashboard tab will show the financial information for a project's year-to-date revenue/expense categories including a breakout for direct and indirect expenses:

Project Number	The number of the Project including project prefix
Project Name	The name of the Project
Project Manager	The owner of the Project, i.e. the PI responsible for the account
Project Status	The Status of the project, i.e. Active, Closed, etc.
Project Organization Name	The Cost Center where the Project lives



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Award Number	The Award Number associated with the Project Non-Sponsored Projects will show No Value
Sponsor Name	The Sponsor of the Project Non-Sponsored Projects will show No Value
Project Start Date	The start date of the Project
Project Finish Date	The end date of the Project Some Non-Sponsored Projects will not show an end date
Direct/Indirect	Reports if the value is direct or indirect cost
Current Budget	Shows the current budgeted amount of the Project Non-Sponsored Projects will not have a budget unless they are provided to the PPM Office Budgets are for the life of the Project not year to date
Expenses-ITD	Shows the total of all Project Expenses Inception to date
Budget-Actuals	Shows the Budget minus Actuals (Expenses-ITD)
Revenue, Salary, Fringe and Expense Categories	Shows the amounts paid for each category year to date on the Project

Expense Details:

The Expense Details tab will give specific expense details for each Project/transaction. This tab can be reached directly or be drilling through from the PPM Proj Dashboard.

Project Number	The number of the Project including project prefix
Project Name	The name of the Project



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Project Manager	The owner of the Project, i.e. the PI responsible for the account
Project Status	The Status of the project, i.e. Active, Closed, etc.
Project Organization Name	The Cost Center where the Project lives
Award Number	The Award Number associated with the Project Non-Sponsored Projects will show No Value
Sponsor Name	The Sponsor of the Project Non-Sponsored Projects will show No Value
Fiscal Period	The period of the recorded activity
Supplier Name	Name of the supplier
Purchase Order	The unique number of the approved order
Supplier Invoice Number	The unique invoice number
Expenditure Type	The Natural Account This includes the Natural Account number
Expenditure Comment	The line description of the item
User Expeniture Batch	Internal WaveWorks tracking number
Revenue, Salary, Fringe and Expense Categories	Shows the amounts paid for each category based on filter

Invoices Details:

The Invoices Details tab will give specific invoice details for each Project/transaction. This tab can be reached by drilling through from the Expense Details tab.



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The left table will show the invoice information.

Invoice Number	The Invoice Number
Invoiced Date	The date of the Invoice
Invoice Creation Date	The date the invoice was entered into WaveWorks
Supplier Site Name	The address on the invoice
Transaction Type Name	The type of transaction
	Standard for POs
	Payment Request for Expense Reports
Installment Payment Status	Installment Payment Status
Invoice Accounting Status	This will show if the invoice is paid or unpaid
Invoices Amount	The total amount of the invoice

The right table will show payment information for the invoice. If there is no data in the right table, there have been no payments made against the invoice.

Invoice Number	The Invoice Number
Invoice Payment Method Description	How the payment was issued, ex. EFT, Check, etc
Payables Source Name	Where is the transaction from, i.e. Expense Reports, B2B XML invoice (punch out)
Transaction Type Description	Describes the type of invoice



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Payment Due Date	The date the payment is due
Payment Date	The date the payment is made
Payment Cleared Date	The date the payment is cleared from Tulane's bank
Payment Document Number	The internal Tulane document number
Payment Status Name	The status of the payment
Payments Amount	The amount of the payment made

PO Details:

The PO Details tab will give specific PO details for each Project/transaction. This tab can be reached by drilling through from the Expense Details tab.

Project Number	The number of the Project including project prefix
Purchase Order Number	The unique number of the approved order
Purchase Order Creation Date	The date that a Purchase Order is created
Supplier Name	Name of the supplier
Status	This is the status of the Purchase Order
Purchase Order Line Number	The line number of the Purchase Order that corresponds with the item
Ordered Quantity	The number of items purchased This may be less than a whole number if there is a split allocation



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Unit Price	The price of the item from the vendor
Ordered Amount	The total cost of the item charged to the Project
Funds Status	The status of the funds, i.e. Liquidated, Reserved, etc
Natural Account Description	The name of the Natural Account charged
Invoice Number	The unique number of the invoice
Installment Payment Status	Payment Status of the Invoice

