Dashboard: Sponsored Research Accounts Receivable Aging Report

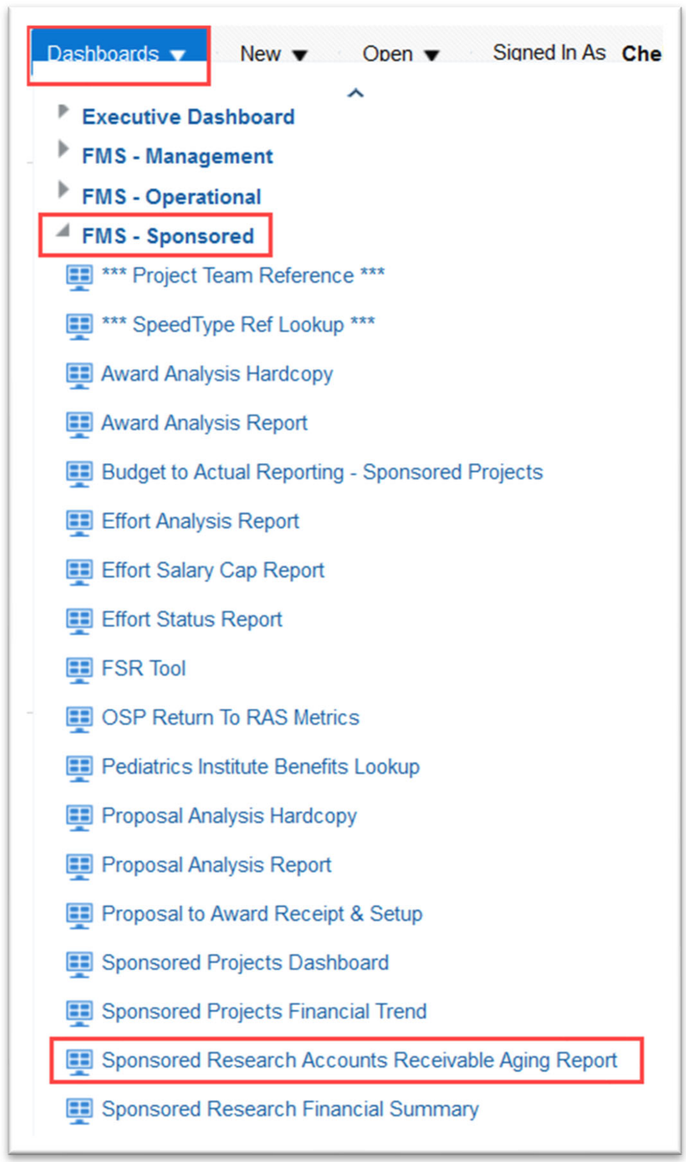
What is the Sponsored Research Accounts Receivable Aging Report?

The Sponsored Research Accounts Receivable Aging Report provides a report of outstanding invoices due to Emory on sponsored projects and their aging status, if late. The report allows users to analyze outstanding invoices on Sponsored Projects and provides details regarding the agency information, contract information, principal investigator, and invoice due dates. Aging of outstanding invoices is broken into categories of Current, 0-30 days, 31-60 days, 61-90 days, 91-120 days, and greater than 120 days. Aging categories are calculated using the Invoice Due Date.

The dashboard includes the **Accounts Receivable Aging Summary** page, which displays visualizations and a summary version of the data and the **Accounts Receivable Aging Details** page, which displays detailed tables.

Where do I find this report in EBI?

1. Log in to EBI: https://dwbi.emory.edu/analytics
2. Click on the Dashboards Menu in the upper right corner
3. In the FMS – Sponsored folder, click the Sponsored Research Accounts Receivable Aging Report link.



Dashboard: Sponsored Research Accounts Receivable Aging Report

Selecting Prompts

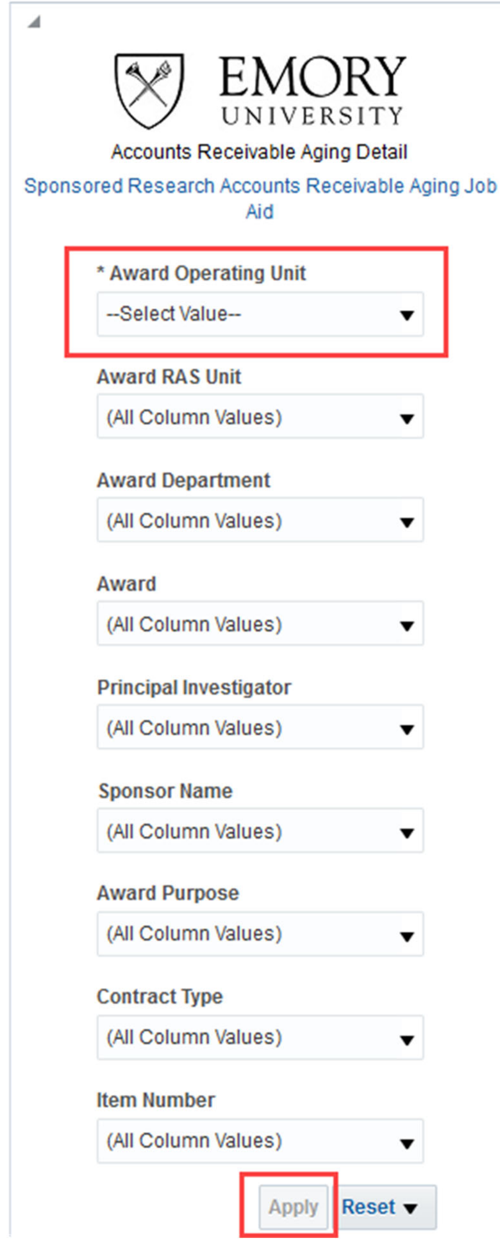
1. Select an Award Operating Unit or choose All Column Values and select values for other prompts as needed.

2. Click Apply.

   TIP: Remember, a required prompt is indicated by an *. The only required prompt on this page is the Award Operating Unit prompt. '(All Column Values)' is a valid prompt selection even for required prompts.

   The Prompt options are the same for both the Accounts Receivable Aging Summary and the Accounts Receivable Aging Details pages.

   TIP: Once you have Applied your selections on one page, the dashboard will apply those selections to the other page as well.



Dashboard: Sponsored Research Accounts Receivable Aging Report

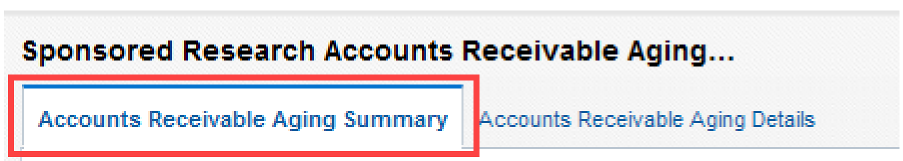
The report title is visible when the dashboard is first opened. The title section includes the date you are running the report and the definition for **AR Risk Status**.

AR Risk Status is defined as follows:

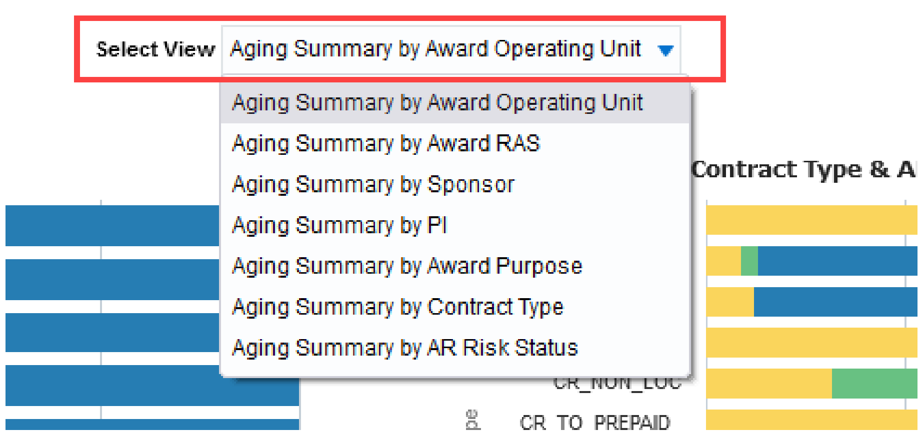
- **Active Status:** Awards with end dates after today's date.
- **Closing Status:** Awards with end dates 0-90 days before today's date.
- **Inactive Status:** Awards with end dates >90 days before today's date.

Accounts Receivable Aging Summary Page

The default page (or tab) on the dashboard is the **Accounts Receivable Aging Summary**. This page will display visualizations and summarized data tables based on the prompts, with several View Options available.



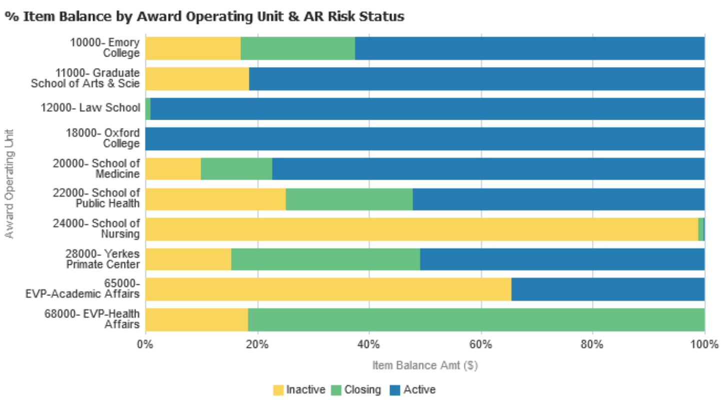
After selecting and applying prompts, results will display. The **View Selector menu** appears with seven (7) view options available. Aging Summary by Award Operating Unit is the default view. The different views represent alternative ways to view the data but will have similar visualizations and tables.

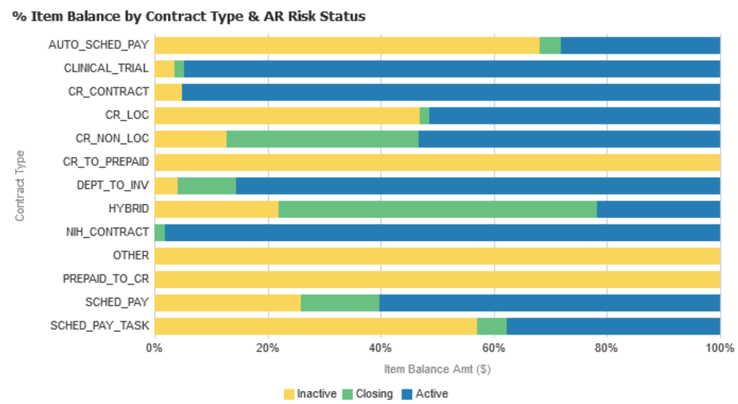


Dashboard: Sponsored Research Accounts Receivable Aging Report

View Selector Options:

1. The **Aging Summary by Award Operating Unit** view summarizes aging items by Award Operating Unit, AR Risk Status, and Contract Type. It includes visualizations showing:
    - **% Item Balance by Award Operating Unit & AR Risk Status**
    - **% Item Balance by Contract Type & AR Risk Status** (this visualization appears on every view option)





Two tables can be found below these visualizations. **The first table displays the Item Balance ($), the % Item Balance, and the Count of Items by Award Operating Unit and AR Risk Status**.

	Active			Closing			Inactive			Item Balance ($)	% Item Balance	Count of Items
Award Operating Unit	Item Balance ($)	% Item Balance	Count of Items	Item Balance ($)	% Item Balance	Count of Items	Item Balance ($)	% Item Balance	Count of Items			
10000- Emory College	913,895.61	1.5%	80	147,540.06	0.2%	19	219,162.24	0.4%	59	**1,280,597.91**	**2.1%**	**158**
11000- Graduate School of Arts & Scie	4,000.00	0.0%	1				916.20	0.0%	2	**4,916.20**	**0.0%**	**3**
12000- Law School	49,416.31	0.1%	1				(0.01)	-0.0%	1	**49,416.30**	**0.1%**	**2**
18000- Oxford College	3,306.35	0.0%	3							**3,306.35**	**0.0%**	**3**
20000- School of Medicine	39,534,269.34	65.8%	3349	4,585,598.16	7.6%	343	3,943,143.38	6.6%	912	**48,063,010.88**	**80.0%**	**4604**
22000- School of Public Health	3,129,520.45	5.2%	175	1,206,638.03	2.0%	76	1,312,442.07	2.2%	180	**5,648,600.55**	**9.4%**	**431**
24000- School of Nursing	200,178.02	0.3%	7				598,124.36	1.0%	88	**798,302.38**	**1.3%**	**95**
28000- Yerkes Primate Center	1,165,243.09	1.9%	61	2,317,000.97	3.9%	16	684,192.96	1.1%	82	**4,166,437.02**	**6.9%**	**159**
65000- EVP-Academic Affairs	5,284.85	0.0%	1				(639.00)	-0.0%	1	**4,645.85**	**0.0%**	**2**
68000- EVP-Health Affairs	15,000.00	0.0%	1	10,000.00	0.0%	1	2,250.00	0.0%	1	**27,250.00**	**0.0%**	**3**
Grand Total	**45,020,114.02**	**75.0%**	**3679**	**8,266,777.22**	**13.8%**	**455**	**6,759,592.20**	**11.3%**	**1326**	**60,046,483.44**	**100.0%**	**5460**

TIP: Additional columns are available to include in the table. Simply right click on any column header and navigate to Include Column to see available options.

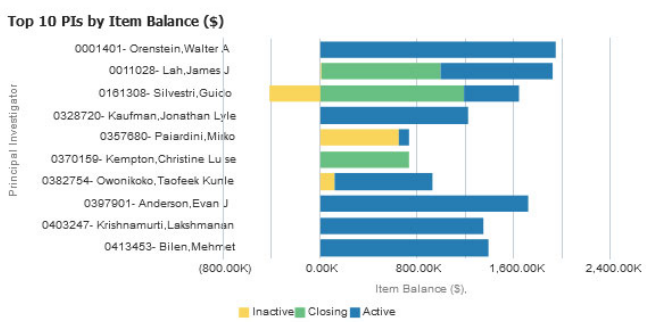
The second table shows the summarized dollars by Aging Category, sorted by Award Operating Unit.

Dashboard: Sponsored Research Accounts Receivable Aging Report

Award Operating Unit	AR Risk Status	Contract Type	Current ($)	0-30 Days ($)	31-60 Days ($)	61-90 Days ($)	91-120 Days ($)	121-180 Days ($)	181-365 Days ($)	> 365 Days ($)	Item Balance ($)
10000- Emory College	Active	CR_LOC	0.00	37,492.45	0.00	0.00	24,320.98	0.00	35,754.24	(772.20)	96,795.47
		CR_NON_LOC	0.00	141,266.45	26,802.37	0.01	22,427.38	4,360.18	26,884.30	436.71	222,177.40
		SCHED_PAY	0.00	232,968.75	331,954.00	(0.01)	30,000.00	0.00	0.00	0.00	594,922.74
	Active Total		**0.00**	**411,727.65**	**358,756.37**	**0.00**	**76,748.36**	**4,360.18**	**62,638.54**	**(335.49)**	**913,895.61**
	Closing	CR_NON_LOC	0.00	9,551.23	38,211.73	10,694.05	48,391.76	19,191.68	21,499.61	0.00	147,540.06
	Closing Total		**0.00**	**9,551.23**	**38,211.73**	**10,694.05**	**48,391.76**	**19,191.68**	**21,499.61**	**0.00**	**147,540.06**
	Inactive	AUTO_SCHED_PAY	0.00	0.00	0.00	0.00	0.00	0.00	(267.51)	431.31	163.80
		CR_LOC	0.00	0.00	79.59	14,335.38	4,867.80	(2,557.59)	(3,190.52)	2,543.87	16,078.53
		CR_NON_LOC	0.00	0.00	0.00	0.00	166.11	18,257.31	0.00	80,701.66	99,125.08
		PREPAID_TO_CR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7,050.00	7,050.00
		SCHED_PAY	0.00	17,379.61	0.00	0.00	0.00	33,223.00	27,902.41	18,239.81	96,744.83
	Inactive Total		**0.00**	**17,379.61**	**79.59**	**14,335.38**	**5,033.91**	**48,922.72**	**24,444.38**	**108,966.65**	**219,162.24**
11000- Graduate School of Arts & Scie	Active	CR_LOC	0.00	0.00	0.00	0.00	4,000.00	0.00	0.00	0.00	4,000.00
	Active Total		**0.00**	**0.00**	**0.00**	**0.00**	**4,000.00**	**0.00**	**0.00**	**0.00**	**4,000.00**
	Inactive	AUTO_SCHED_PAY	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00	1.00
		CR_NON_LOC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	915.20	915.20
	Inactive Total		**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**916.20**	**916.20**

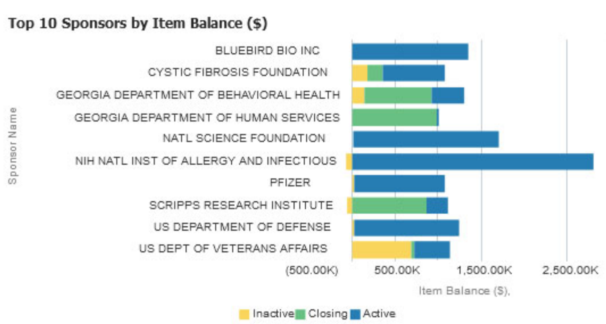
Finally, at the bottom of the page you will find a section for **Top 10 Trends**. This section appears on every view option and includes visualizations and tables by:

- **Top 10 PIs by Item Balance ($)**
- **Top 10 Sponsors by Item Balance ($)**



	Item Balance ($)		
Principal Investigator	Active	Closing	Inactive
0001401- Orenstein,Walter A	1,953,684.49		
0011028- Lah,James J	928,030.85	987,822.16	9,540.00
0161308- Silvestri,Guido	455,864.95	1,192,167.67	(417,998.06)
0328720- Kaufman,Jonathan Lyle	1,221,788.39	2,805.00	
0357680- Paiardini,Mirko	85,145.39		654,559.77
0370159- Kempton,Christine Luise		734,570.50	3,789.65
0382754- Owonikoko,Taofeek Kunle	811,847.09		117,876.83
0397901- Anderson,Evan J	1,724,908.00		
0403247- Krishnamurti,Lakshmanan	1,351,510.39		
0413453- Bilen,Mehmet	1,397,027.14		
Grand Total	**9,929,806.69**	**2,917,365.33**	**367,768.19**

Refresh - Print - Export

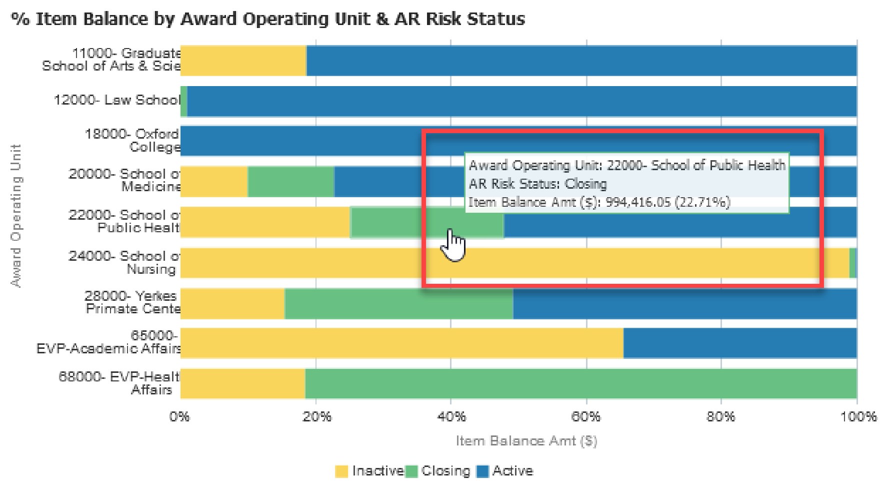


	Item Balance ($)		
Sponsor Name	Active	Closing	Inactive
BLUEBIRD BIO INC	1,348,985.39		
CYSTIC FIBROSIS FOUNDATION	719,890.25	172,769.16	180,929.14
GEORGIA DEPARTMENT OF BEHAVIORAL HEALTH	381,582.00	778,764.65	146,150.84
GEORGIA DEPARTMENT OF HUMAN SERVICES	28,476.71	984,197.89	(2,960.00)
NATL SCIENCE FOUNDATION	1,700,698.34	7,882.81	2,917.75
NIH NATL INST OF ALLERGY AND INFECTIOUS	2,809,180.29	3,402.03	(69,654.41)
PFIZER	1,056,714.06		22,846.20
SCRIPPS RESEARCH INSTITUTE	245,093.91	870,463.89	(63,953.34)
US DEPARTMENT OF DEFENSE	1,214,059.64		26,816.04
US DEPT OF VETERANS AFFAIRS	416,631.30	30,333.41	687,727.66
Grand Total	**9,921,311.89**	**2,847,813.84**	**930,819.88**

Refresh - Print - Export

Dashboard: Sponsored Research Accounts Receivable Aging Report

TIP: You can use your mouse to hover over the sections on any visualization to see additional details about what makes up that segment.



2. The **Aging Summary by Award RAS** view summarizes aging items by Award RAS Unit, AR Risk Status, and Contract Type. It is similar to the Award Operating Unit view, and includes the same type of visualizations and tables, simply organized by RAS Unit.

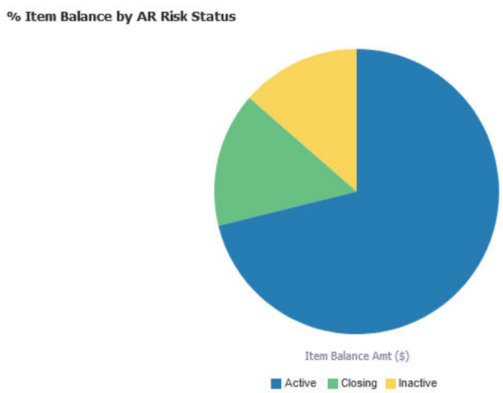
3. The **Aging Summary by Sponsor** view summarizes aging items by Sponsor Name, AR Risk Status, and Contract Type. Note that this view does not include a visualization for all Sponsors but does include the Top 10 Sponsors by Item Balance visualization and table at the bottom of the page.

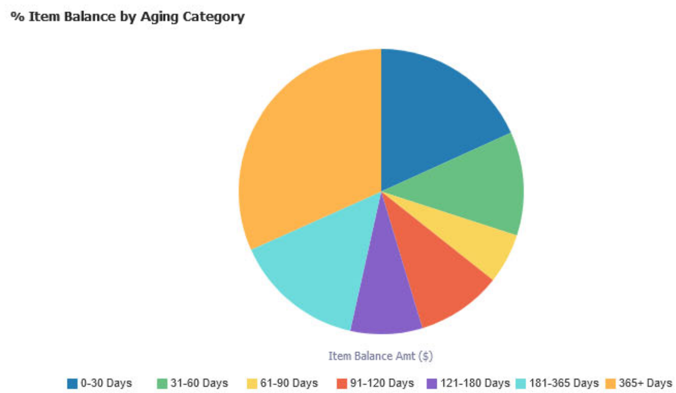
4. The **Aging Summary by PI** view summarizes aging items by Principal Investigator, AR Risk Status, and Contract Type. Note that this view does not include a visualization for all Principal Investigators but does include the Top 10 PIs by Item Balance visualization and table at the bottom of the page.

5. The **Aging Summary by Award Purpose** view summarizes aging items by Award Purpose, AR Risk Status, and Contract Type. It is similar to the Award Operating Unit and RAS views, and includes the same type of visualizations and tables, simply organized by RAS Unit.

6. The **Aging Summary by Contract Type** view summarizes aging items by Contract Type and AR Risk Status.

7. The **Aging Summary by AR Risk Status** view summarizes aging items by the AR Risk Status and the Aging Category. It includes visualizations by each of those attributes, tables, and trends by PI and Sponsor.

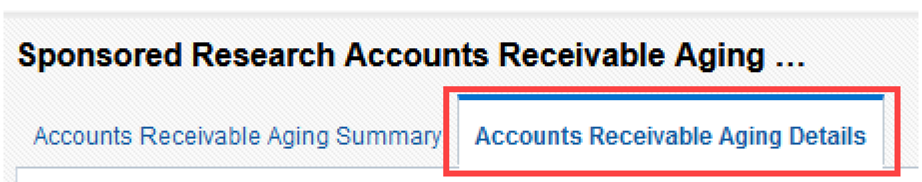




Accounts Receivable Aging Details Page

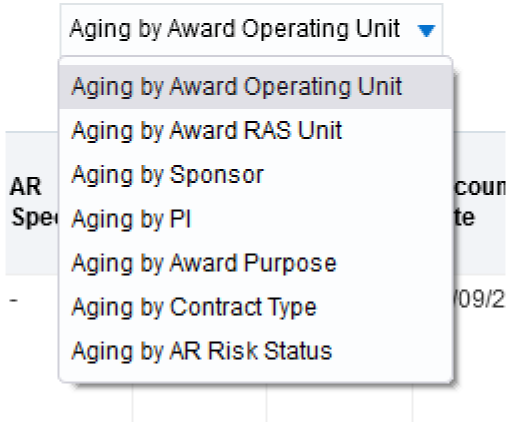
The next page (or tab) on the dashboard is the **Accounts Receivable Aging Details** page. It includes tables that display attributes of the Item that is aging, such as Sponsor details, Award details, Original Item Amount, Item Balance, and Aging details. There is also an option to drill to Project details that show Original Item Amount and Item Balance at the Project level, and the full list of Projects associated with an Award.

NOTE: Item Aging is only displayed at the Award level. Aging is not calculated at the Project level.



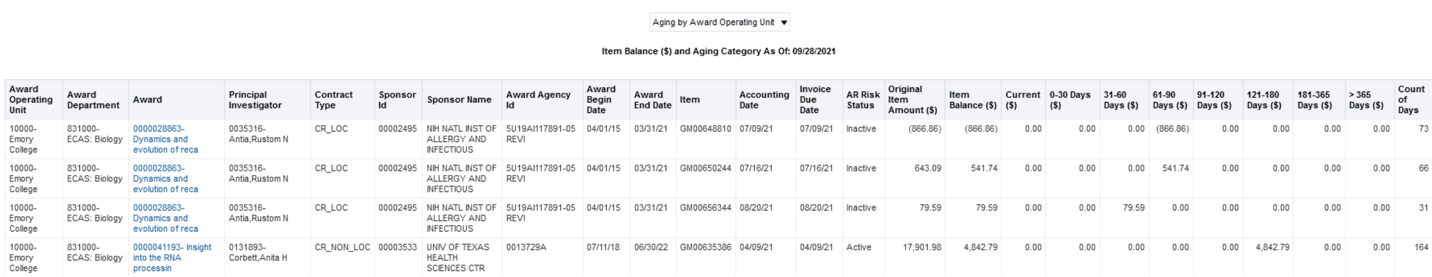
After selecting and applying prompts, results will display. The **View Selector menu** appears with seven (7) view options available. Aging by Award Operating Unit is the default view. The different views represent alternative ways to view the data, but will have similar tables.

Dashboard: Sponsored Research Accounts Receivable Aging Report



View Selector Options:

1. The **Aging by Award Operating Unit** view displays Item details and Aging sorted by Award Operating Unit.



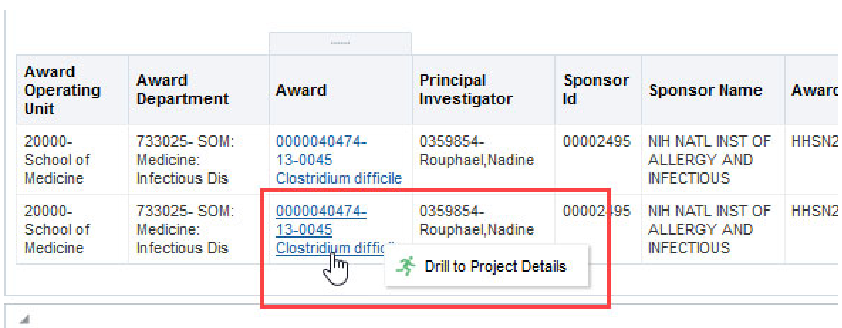
Aging by Award Operating Unit

Item Balance ($) and Aging Category As Of: 09/28/2021

Award Operating Unit	Award Department	Award	Principal Investigator	Contract Type	Sponsor Id	Sponsor Name	Award Agency Id	Award Begin Date	Award End Date	Item	Accounting Date	Invoice Due Date	AR Risk Status	Original Item Amount ($)	Item Balance ($)	Current ($)	0-30 Days ($)	31-60 Days ($)	61-90 Days ($)	91-120 Days ($)	121-180 Days ($)	181-365 Days ($)	> 365 Days ($)	Count of Days
10000- Emory College	831000- ECAS: Biology	0000028863- Dynamics and evolution of reca	0035316- Antia,Rustom N	CR_LOC	00002495	NIH NATL INST OF ALLERGY AND INFECTIOUS	5U19AI117891-05 REVI	04/01/15	03/31/21	GM00648810	07/09/21	07/09/21	Inactive	(866.86)	(866.86)	0.00	0.00	0.00	(866.86)	0.00	0.00	0.00	0.00	73
10000- Emory College	831000- ECAS: Biology	0000028863- Dynamics and evolution of reca	0035316- Antia,Rustom N	CR_LOC	00002495	NIH NATL INST OF ALLERGY AND INFECTIOUS	5U19AI117891-05 REVI	04/01/15	03/31/21	GM00650244	07/16/21	07/16/21	Inactive	643.09	541.74	0.00	0.00	0.00	541.74	0.00	0.00	0.00	0.00	66
10000- Emory College	831000- ECAS: Biology	0000028863- Dynamics and evolution of reca	0035316- Antia,Rustom N	CR_LOC	00002495	NIH NATL INST OF ALLERGY AND INFECTIOUS	5U19AI117891-05 REVI	04/01/15	03/31/21	GM00656344	08/20/21	08/20/21	Inactive	79.59	79.59	0.00	0.00	79.59	0.00	0.00	0.00	0.00	0.00	31
10000- Emory College	831000- ECAS: Biology	0000041193- Insight into the RNA processin	0131893- Corbett,Anita H	CR_NON_LOC	00003533	UNIV OF TEXAS HEALTH SCIENCES CTR	0013729A	07/11/18	06/30/22	GM00635386	04/09/21	04/09/21	Active	17,901.98	4,842.79	0.00	0.00	0.00	0.00	0.00	4,842.79	0.00	0.00	164

TIP: Tables in EBI will default sort by the left most column. Sorts can be modified through a customization.

A Drill is available from the Award. Clicking the hyperlink will prompt you to **Drill to Project Details**.



Award Operating Unit	Award Department	Award	Principal Investigator	Sponsor Id	Sponsor Name	Awarc
20000- School of Medicine	733025- SOM: Medicine: Infectious Dis	0000040474- 13-0045 Clostridium difficile	0359854- Rouphael,Nadine	00002495	NIH NATL INST OF ALLERGY AND INFECTIOUS	HHSN2
20000- School of Medicine	733025- SOM: Medicine: Infectious Dis	0000040474- 13-0045 Clostridium diffic	0359854- Rouphael,Nadine	00002495	NIH NATL INST OF ALLERGY AND INFECTIOUS	HHSN2

A new browser tab will open that displays the Project associated with that Award and Item, as well as a list of all Projects associated with the Award.

Accounts Receivable Sponsored Project Detail

Award	Project	Item	Original Item Amount	Applied Payment	Item Balance
0000040474- 13-0045 Clostridium difficile	00065006- 13-45 CDAD C. Base DOM: ID	GM00610625	10,135.81	10,139.04	(3.23)

Refresh - Print - Export

Sponsored Projects on Award

Award	Project	Project Activity
0000040474- 13-0045 Clostridium difficile	00065006- 13-45 CDAD C. Base DOM: ID	YRALL
	00065479- 13-45 CDAD C. Base Pathology	YRALL
	00065480- 13-45 CDAD C. Base PEDS: ID	YRALL
	00065481- 13-45 CDAD D.4 DOM: ID	YRALL
	00065482- 13-45 CDAD D.1 DOM: ID	YRALL
	00065483- 13-45 CDAD D.5 Pathology	YRALL

Refresh - Print - Export

2. The **Aging by Award RAS Unit** view displays Item details and Aging sorted by Award RAS Unit, with the option to drill to Project Details from the Award.

3. The **Aging by Sponsor** view displays Item details and Aging sorted by the award Sponsor, with the option to drill to Project Details from the Award.

4. The **Aging by PI** view displays Item details and Aging sorted by award Principal Investigator, with the option to drill to Project Details from the Award.

5. The **Aging by Award Purpose** view displays Item details and Aging sorted by Award Purpose, with the option to drill to Project Details from the Award.

6. The **Aging by Contract Type** view displays Item details and Aging sorted by Award Contract Type, with the option to drill to Project Details from the Award.

7. The **Aging by AR Risk Status** view displays Item details and Aging sorted by AR Risk Status, with the option to drill to Project Details from the Award.

More Information:

For questions about Item Amounts or Balances, please contact the Accounts Receivable team at **ogcateam4@emory.edu**

For questions about or issues with the Sponsored Research Accounts Receivable Aging Report, please contact the Analytics & Reporting team via the [Finance Support Center](). Choose **Emory Business Intelligence (EBI)/Reporting** as your ticket category.