

Instructions on Running and Saving an OT Project Summary Report

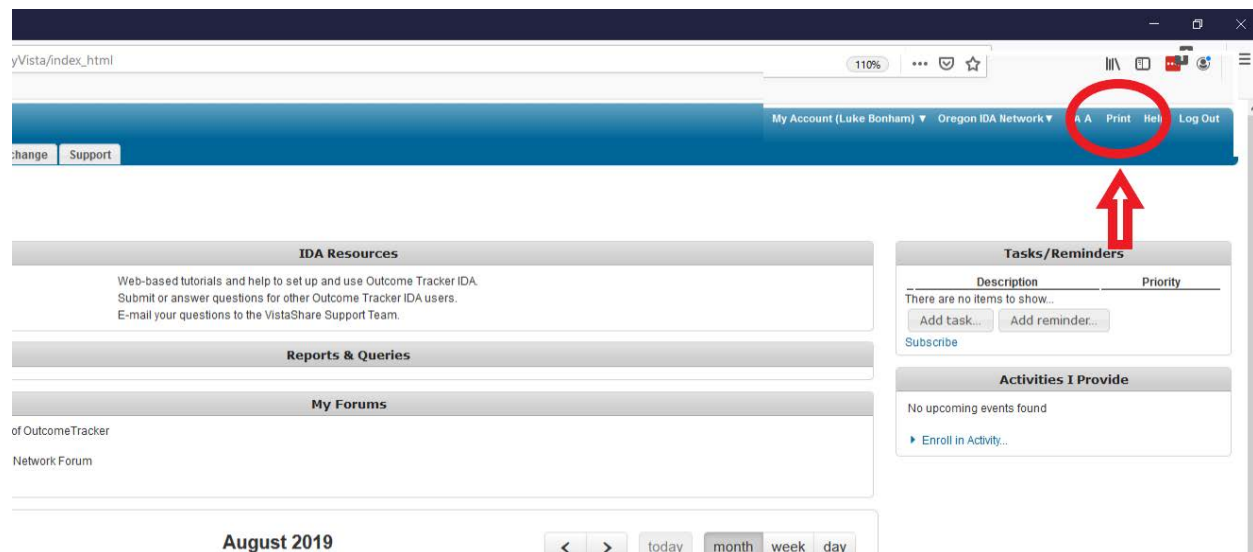
To Run an Outcome Tracker: *Project Summary – Select by Project Report*

- Report location: Outcome Tracker, Reports tab: Standard Reports > IDA / CSA > Project Reports > Project Summary – Select by Projects
- Prompted fields for “all time” report:
 - All open grants
 - Start date: 1/1/2000
 - End date: close date for quarter shown in Quarterly Fiscal Report
- Save the report by printing to PDF (see below for instructions).
 - Naming convention: FONAME_XXXX_QX_ProjectSummary
where “FONAME” is your organization’s name, and XXXX is the program year, and the X in QX is the quarter being reported on.

Instructions for Printing to PDF in Outcome Tracker

When saving and sending an OT report, it is important that you follow the process outlined below (rather than “ctrl P”) to print/save as PDF. When you follow this process for saving a report, the date range & grant years you included are displayed at the top, giving everyone more complete information about the report. **This is how we want all Project Summaries and other OT reports to be saved.**

- Click on “Print” in upper right corner (see screen shot below)



- A print preview page will appear
- Click on “Print this page” at the top center of the page
- Change the printer destination to “Save as PDF” and you will be prompted to choose a location to save the PDF on your computer.

SAMPLE Project Summary

Project: the grants selected

Project Amount: total match in that grant

Match Withdrawn: This is match disbursed. On Quarterly Fiscal report Cell G4

Actual matches (as of prompt date) by project (grant) – click for account holder detail

Project	Project Amount	# of Accounts	Match Earned (from account deposits and interest)	Interest distributed from matching funds	Match Withdrawn	Match Balance in Accounts	Match Reserve Account Balance
ORIDA14	\$225,000.00	80	223,650.57	0.00	-211,043.03	12,607.54	13,956.97
ORIDA15	\$225,000.00	48	124,130.06	0.00	-35,711.95	88,418.11	189,288.05
ORIDA16	\$195,000.00	33	65,052.98	0.00	0.00	65,052.98	195,000.00
ORIDA19	\$382,500.00	47	128,672.44	0.00	0.00	128,672.44	382,500.00
Total	\$1,027,500.00	208	541,506.05	0.00	-246,754.98	294,751.07	780,745.02

Intended Use	Match Withdrawn	Match Balance in Accounts
Business	-34,500.00	77,731.63
Education	-212,254.98	217,019.44

Potential Match: This is match allocated (match that has been committed to open accounts in OT): On Quarterly Fiscal Report Cell K4

Potential matches (as of today) by project (grant)

Project	Operating amount	Project amount	Potential match	Amount remaining	% Available
ORIDA14	\$75,000.00	\$225,000.00	\$225,000.00	0.00	0.00
ORIDA15	\$75,000.00	\$225,000.00	\$224,446.95	553.05	0.25
ORIDA16	\$105,000.00	\$195,000.00	\$182,442.58	12,557.42	6.44
ORIDA19	\$271,250.00	\$382,500.00	\$324,239.69	58,260.31	15.23
ORIDA21	\$81,750.00	\$117,000.00	\$0.00	117,000.00	100.00

Totals

Agency	Operating amount	Project amount	Potential match	Amount remaining	% Available
	\$608,000.00	\$1,144,500.00	\$956,129.22	188,370.78	16.46

Amount remaining: the total unallocated match between all open grants. This is the total of what you have available to allocate