

Recommended Reports by Role

The following list of recommended reports by role is provided to help you choose the report(s) to use in your day-to-day business.

Role	Financial Activity	Reports
Control Point Manager	Comparing actual financial activity to plan/forecast for different levels/units of the Control Point	<ul style="list-style-type: none"> • Actual vs. Plan Comparison Report • Operational Monthly Report • Organization Report
	Reviewing a unit's financial health	<ul style="list-style-type: none"> • Net Position Report • Operational Monthly Report • Sponsored Projects Balances Report
	Analyzing actual financial activity by funding source and use	<ul style="list-style-type: none"> • Fund Group Report • Project Use Report • Mission Based Report
Department Manager	Developing/reviewing financial plan	<ul style="list-style-type: none"> • Actual vs. Plan Comparison Report • Current Year vs. Prior Year Actuals Comparison Report • Organization Report • Payroll Funding Report
	Department's financial health (summary GL Verification)	<ul style="list-style-type: none"> • Net Position Report • Operational Monthly Report • Sponsored Projects Balances Report • Gift & Endowment Income Report
Financial Analyst or Assistant	Detailed GL Verification	<ul style="list-style-type: none"> • Transaction Detail Report • Operational Monthly Report • Distribution of Payroll Expense Report
	Question about a PO (including payment)	<ul style="list-style-type: none"> • AP/PO Report
	Determining whether a PO needs to be changed or closed	<ul style="list-style-type: none"> • PO Lien Balance Report
	Managing Accounts Receivable	<ul style="list-style-type: none"> • Balance Sheet Report
HR Manager or Analyst	Reviewing employee appointments or distributions	<ul style="list-style-type: none"> • Employee Lookup • HR Monthly Review Report
	Confirming Payroll Activity	<ul style="list-style-type: none"> • Distribution of Payroll Expense (DPE) Report
Asset Custodian	Reviewing a Department's assets	<ul style="list-style-type: none"> • Asset Management Report
Principal Investigator	Review your entire portfolio	<ul style="list-style-type: none"> • MyPortfolio Report
Research Support Analyst (RSA) or Post-Award Analyst	Faculty controlled funding (including Sponsored Award activity)	<ul style="list-style-type: none"> • MyPortfolio Report • Sponsored Projects Balances Report • Award/Parent Summary Report • Faculty Portfolio Monthly Report • Faculty Monthly Rolling Projections Report • Payroll Detail by Month Report • Program Portfolio Report • Project Summary Report • Sponsored Projects Summary Report

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Additional Information & Assistance

- Additional information about **MyReports** including how to request access, training and contact information can be found in the MyReports section of the [Controller's Office website](#)
- If you require help with a technical problem, or have a question about a specific report, contact the Controller's Office Solution Center at COSolutionCenter@ucsf.edu or 415.476.2126
- To stay informed about **MyReports** news, follow the directions on the MyReports section of the [Controller's Office website](#) to join the MyReports ListServ