

Last Updated: 2/05/25

Reporting in GMIS Portal



Duration: 45 Minutes



Audience: Agency Primary and Secondary Users



Key Terms

Objects

Pages in GMIS that allow you to store specific data. i.e., Solicitations.

Report Viewer

Object to view a ran report in GMIS Portal.

Records

Specific data stored within an object. i.e., Specific Solicitation.

Fields

Specific data stored within an object across all records. i.e., Grant Year.

Please Reference the Job Aid!

The following Job Aid Sections can be referenced for greater detail and a more in-depth overview for content covered in the next slides:

- **1.0 Navigate to Reports.**
- **2.0 Run a Report.**
- **3.0 Export a Report.**



GMIS Portal Reporting Job Aid.

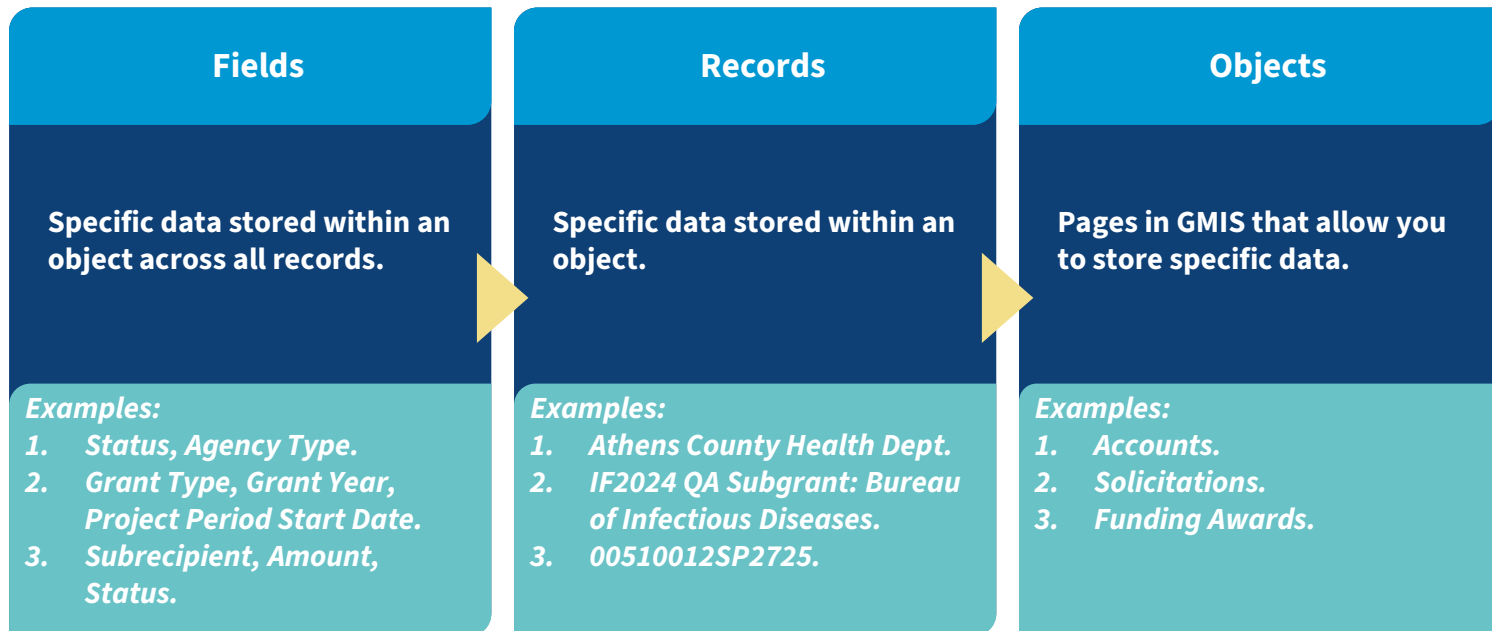
Reports Overview



Audience: Agency Primary and Secondary Users

Fields, Records, Objects

Reporting in GMIS is based on fields, records, and objects.



Accessing Reports

Access *Reports* via the banner at the top of GMIS Portal.

Department of Health

Home Browse Grants My Applications My Awards My Agency Profile **Reports**

Reports

Recent

3 Items

Search recent reports...

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent						
Created by Me						
Private Reports	Copy of Financial Report	This report can be used as the basis of Financial Reporting Summary, formerly the SEFA Report, shows all federal expenditures of an agency for over \$750,000	Subrecipient Reports		10/3/2024, 10:09 AM	
All Reports						
FOLDERS						
All Folders						
Created by Me	Financial Reporting Summary	This report can be used as the basis of Financial Reporting Summary, formerly the SEFA Report, shows all federal expenditures of an agency for over \$750,000	Subrecipient Reports		9/26/2024, 3:46 PM	
Shared with Me						
FAVORITES						
All Favorites						

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View section 1.0 *Navigate to Reports.*

Navigating Reports

The reports object has the following layout.

The screenshot shows the 'Reports' page of the Ohio Department of Health portal. The navigation bar at the top includes links for Home, Browse Grants, My Applications, My Awards, My Agency Profile, and Reports. The left sidebar contains a 'Reports' section with 'Recent' (3 items) and 'FOLDERS' (All Folders, Created by Me, Shared with Me). The main content area displays a table of reports. Callout 01 points to a search bar, 02 to the sidebar, 03 to a dropdown menu, and 04 to the 'Run' and 'Export' buttons.

Report Name	Description	Folder	Created By	Created On
Copy of Financial Repor	This report can be used as the basis of Financial Reporting Summary, formerly the SEFA Report, shows all federal expenditures of an agency for over \$750,000	Subrecipient Reports		10/3/2024, 10:09 AM
Financial Reporting Sun	This report can be used as the basis of Financial Reporting Summary, formerly the SEFA Report, shows all federal expenditures of an agency for over \$750,000	Subrecipient Reports		9/26/2024, 3:46 PM



Select folder 'ODH Reports' to view reports set up by ODH for GMIS Portal go-live.

Export

Reports are exported in an Excel file.

Export

Export View

Formatted Report

Export the report, including the report header, groupings, and filter settings.

Details Only

Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format

Excel Format .xlsx

Cancel

Export



View section 3.0 *Export a Report*.

Financial Reporting Summary (formerly SEFA)

Report: Financial Reporting Summary

Financial Reporting Summary Report

This report can be used as the basis of Financial Reporting Summary, formerly the SEFA Report, shows all federal expenditures of an agency for over \$750,000

Enable Field Editing 🔍 Add Chart 📉 🗑️ Export

Total Records
18

	Federal Grantor Agency	Pass Through Agency	Grant Title	Grant Project Number	Fu
1	Federal Award Agency Subgrant 21	Bureau of HIV, STI and Hepatitis	JE2020 QA Subgrant Sprint 5 HIVP2	00220014JE0220	Q/
2	Federal Award Agency Subgrant 21	Bureau of HIV, STI and Hepatitis	JE2020 QA Subgrant Sprint 5 HIVP2	00220014JE0220	Q/
3	Federal Award Agency Subgrant 21	Bureau of HIV, STI and Hepatitis	JE2015 QA Subgrant Sprint 5 HIVP2	05060014JE1315	Q/
4	Federal Award Agency Subgrant 21	Bureau of HIV, STI and Hepatitis	JE2019 QA Subgrant Sprint 5 HIVP2	00220014JE0219	Q/
5	Federal Award Agency Subgrant 21	Bureau of HIV, STI and Hepatitis	JE2019 QA Subgrant Sprint 5 HIVP2	00220014JE0219	Q/
6	Federal Award Agency Subgrant 21	Bureau of HIV, STI and Hepatitis	JE2020 QA Subgrant Sprint 5 HIVP2	00220014JE0220	Q/
7	Federal Award Agency Subgrant 21	Bureau of HIV, STI and Hepatitis	JE18 QA Subgrant Sprint 5 HIVP2	00220014JE0218	Q/
8	Federal Award Agency Subgrant 2 test	Bureau of HIV, STI and Hepatitis	S52024 QA Sprint 5 12 Months: Bureau of HIV, STI and Hepatitis	00220014S50124	Q/
9	Federal Award Agency Subgrant 21	Bureau of HIV, STI and Hepatitis	JE2020 QA Subgrant Sprint 5 HIVP2	00220014JE0220	Q/
10	-	Bureau of HIV, STI and Hepatitis	F52024 QA Sprint 5 14 Months: Bureau of HIV, STI and Hepatitis	00220014F50124	Q/
11	Federal Award Agency Subgrant 2 test	Bureau of HIV, STI and Hepatitis	S52024 QA Sprint 5 12 Months: Bureau of HIV, STI and Hepatitis	00220014S50124	Q/
12	-	Bureau of Health Improvement and Wellness	BA2024 QA Subgrant Sprint 4: Health Improvement and Wellness	00220011BA0124	Q/
13	Federal Award Agency Subgrant 2 test	Bureau of HIV, STI and Hepatitis	S52024 QA Sprint 5 12 Months: Bureau of HIV, STI and Hepatitis	00220014S50124	Q/
14	-	Bureau of Health Improvement and Wellness	BA2024 QA Subgrant Sprint 4: Health Improvement and Wellness	00220011BA0124	Q/
15	Federal Award Agency Subgrant 21	Bureau of HIV, STI and Hepatitis	JE2019 QA Subgrant Sprint 5 HIVP2	00220014JE0219	Q/

Run a Report



Audience: Agency Primary and Secondary Users

Run a Report

Department of Health

Home Browse Grants My Applications My Awards My Agency Profile Reports

Reports
Recent
3 Items

Search recent reports...

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Copy of Financial Reporting Summary	This report can be used as the basis of Financial Reporting Summary, formerly the SEFA Report, shows all federal expenditures of an agency for over \$750,000	Subrecipient Reports		10/3/2024, 10:09 AM	
Created by Me						
Private Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						
	Financial Reporting Summary	This report can be used as the basis of Financial Reporting Summary, formerly the SEFA Report, shows all federal expenditures of an agency for over \$750,000	Subrecipient Reports		9/26/2024, 3:46 PM	

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View section 2.0 Run a Report.

Viewing a Run Report in Report Viewer

01 Report: Financial Reporting Summary
Financial Reporting Summary Report
This report can be used as the basis of Financial Reporting Summary, formerly the SEFA Report, shows all federal expenditures of an agency for over \$750,000

03 Enable Field Editing Add Chart **04** Export

Total Records
12

02

	Federal Grantor Agency	Pass Through Agency	Grant Title	Grant Project Number	Fund
1	Federal Award Agency Subgrant	Bureau of HIV, STI and Hepatitis	JE2020 QA Subgrant Sprint 5 HIVP2	00220014JE0220	QA Subgrant
2	Federal Award Agency Subgrant	Bureau of HIV, STI and Hepatitis	JE2020 QA Subgrant Sprint 5 HIVP2	00220014JE0220	QA Subgrant
3	Federal Award Agency Subgrant	Bureau of HIV, STI and Hepatitis	JE2019 QA Subgrant Sprint 5 HIVP2	00220014JE0219	QA Subgrant
4	Federal Award Agency Subgrant	Bureau of HIV, STI and Hepatitis	JE2019 QA Subgrant Sprint 5 HIVP2	00220014JE0219	QA Subgrant
5	Federal Award Agency Subgrant	Bureau of HIV, STI and Hepatitis	JE2020 QA Subgrant Sprint 5 HIVP2	00220014JE0220	QA Subgrant
6	Federal Award Agency Subgrant	Bureau of HIV, STI and Hepatitis	JE2018 QA Subgrant Sprint 5 HIVP2	00220014JE0218	QA Subgrant
7	Federal Award Agency Subgrant	Bureau of HIV, STI and Hepatitis	JE2020 QA Subgrant Sprint 5 HIVP2	00220014JE0220	QA Subgrant
8	Federal Award Agency Subgrant	Bureau of HIV, STI and Hepatitis	JE2018 QA Subgrant Sprint 5 HIVP2	00220014JE0218	QA Subgrant
9	-	Bureau of Health Improvement and Wellness	BA2024 QA Subgrant Sprint 4: Health Improvement and Wellness	00220011BA0124	QA Subgrant
10	Federal Award Agency Subgrant	Bureau of HIV, STI and Hepatitis	JE2019 QA Subgrant Sprint 5 HIVP2	00220014JE0219	QA Subgrant
11	Federal Award Agency Subgrant	Bureau of HIV, STI and Hepatitis	JE2022 QA Subgrant Sprint 5 HIVP2	00220014JE0222	QA Subgrant
12	Federal Award Agency Subgrant	Bureau of HIV, STI and Hepatitis	JE2018 QA Subgrant Sprint 5 HIVP2	00220014JE0218	QA Subgrant

Adjusting Report Filters

The screenshot shows a web application interface for adjusting report filters. At the top, there is a toolbar with a 'Filter' button (a blue square with a white funnel icon) labeled '01', a 'Refresh' button (a circular arrow icon), and an 'Export' button. Below the toolbar, a text label reads 'ency for over 50,000'. A 'Filters' panel is open, labeled '02' on its left side. The panel has a title 'Filters' and a close button (a square with an arrow pointing right) labeled '03'. Inside the panel, there are four filter items: 'Show Me' with the value 'All funding award requirements', 'Submitted Date' with the value 'All Time', 'Status' with the value 'equals Approved' and a trash icon, and 'Record Type - Reports' with the value 'equals Expense Report' and a trash icon.

Step 1 Select the *Filter* button.

Step 2 Select the filter you would like to adjust. This will open a pop-up to adjust the filter.

Step 3 Close the filter panel.

Have Questions?

For any further inquiries or additional support, please reach out to:

Grants.Support@odh.ohio.gov

Thank You!

We appreciate your time and participation in today's training session. Your engagement is key to our shared success! In today's session you:

- ✓ Discussed an overview of reporting in GMIS Portal.
- ✓ Ran reports in GMIS Portal.