

## **OLT and ROL** <sup>[1]</sup>

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When a CU sponsored project spends over the maximum amount that can be billed from the sponsor, the expenditures are known as over-the-limit (OLT) transactions. There also can be revenue-over-the-limit (ROL) transactions, when revenue recognition is processed. Three m-Fin reports will show these dollars:

- Project Reports > m-Fin AWARD
- Project Reports > m-Fin OLT
- Project Reports > m-Fin ROL

These reports are available for you to try in Cognos QA. **[Now in production.]** m-Fin AWARD is an existing report that has new columns for OLT and ROL. m-Fin OLT and m-Fin ROL are new reports. In addition to running for award codes these new reports also can run for an org or orgnode. So you can find all OLT or ROL dollars for a department, division, school or college, or campus.

I am still learning about PeopleSoft OLT and ROL transactions. Consider these reports to be a work-in-progress that I am making available to you for feedback, in the spirit of transparency and iterative development.

### **Billing limit vs. budget**

Are billing limit and budget the same? Typically yes. In most cases CU intends that the billing limit and the budget be the same. But since they are not always the same I am looking into how we might display the billing limits (and revenue limits too), else we'll have cases where we will be showing OLT and ROL amounts that are based on limits not shown.

### **Data cleanup still underway**

OLT and ROL transactions come from PeopleSoft's *project costing* processing, which CU is still working on. Part of this work involves clean-up of converted data. Do not make business decisions based on data displayed in these QA reports.

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