Grants Portal - Project Summary

Main Menu > Grants > Grants Work Center

1. Navigation:
   A) Main Menu > Grants > Grants Work Center

2. Search Option tab:
   A) Click on Search Option tab.
   B) Click Search button.

3. Financial Calculating Option:
   A) Balances: select Cost Share, Sponsor, or Both
   B) Date Selection: enter As of Date or Month End

4. Demographics (tab):
   A) Project, Project title, Award Id, Start/End dates, Sponsor, Contact PI, Department, Grant Admin

5. Financial (tab):
   A) Project, Funded, Budgeted, Expended, Encumbered, Remaining balance, Avg Monthly burn rate, remaining months, Total forecast, Uncommitted balance, Uncommitted Percentage, Short title

PeopleSoft Tips
- All projects check marked in the Detail section will appear in the Total Amount of Selected Items balances.
- You can always expand or export to an Excel Spreadsheet using the icons in green above.
- Hyperlinks allow drill down to more specific detailed information.
Grants Portal - Project Details

Main Menu> Grants> Grants Work Center

1. Navigation:
   A) Main Menu> Grants> Grants Work Center

2. Searching Option:
   A) Business Unit: enter UTESP
   B) Project: enter valid project #, click Search

3. Financial Calculating Option:
   A) Balances: select Cost Share, Sponsor, or Both
   B) Budget Period: optional From/Through
   C) Date Selection: enter As of Date or Month End

4. Demographics (tab):
   A) Professional Resource, Department Allocation
5. Activities (tab):
A) Description, Activity Type, Activity Status, Start/End dates, Facilities & Admin

A) Budget item, Budgeted, Expended, Encumbered, Remaining balance.
B) Budget Totals: Budgeted, Expended, Encumbered, Remaining balance.

PeopleSoft Tips
- You can always expand or export to an Excel spreadsheet using the icons in green above.
- Hyperlinks allow drill down to more specific Project Detail information.