

Department User's Training Manual

Topics:

- Setting up a RUN control
- PI Report
- Commitment Control KK
- Award Profile Page
- Project Page
- Project team link
- Setting up a Favorite

Setting up a Run Control

-Select the Add a New Value

HE PI Report

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search by: Run Control ID begins with

Case Sensitive

Search | Advanced Search

Find an Existing Value | Add a New Value

-In the box labeled Run Control ID, create a name for your run control. Use the first initial of your first and last name and then a name that will help you to remember the report. Use the underscore to separate you initials and the report name. **Example:** cn_ndu_pi_report

HE PI Report

Find an Existing Value | Add a New Value

Run Control ID: cn_ndu_pi_report

Add

Find an Existing Value | Add a New Value

-Click the Add button

-Set up a control for each report only ONCE. The next time you want to run the report select the Search button under the Find an Existing Value tab.

Running a PI Report

There are several different fields and boxes that can be selected or completed to gather different data. A description of each box is listed below.

Business Unit: Number assigned to institution
(Required for all PI reports.)

Award: Main award number

Project: Used to run a PI Report for a project under the main award. The award and project boxes need to be completed.

Department: Number assigned to department Can be use to run all reports for a department by only completing the business unit and department fields.

PI: Principle Investigator. Can be used to run reports for one PI by only completing the PI and Business Unit fields

Checkboxes

Sponsor Funding Report- Required for all PI reports.

Cost Share Report- Runs an additional report that shows the cost share Budget and expenditures.

Third Party Report- Runs an additional report that shows the Third Party Cost Share Budget and expenditures

As of Date- Date through which financial data will be displayed.

PI Report

Run Control ID: cn_ndu_pi_report

Business Unit: [UND01] 🔍

Award: [UNDD0014402] 🔍

Only Active Projects in Award (Y/N) Yes

Project: [] 🔍

Dept. Summary * [] 🔍

PI: [] 🔍

Sponsor Funding Report

Cost Share Report**

Third Party Report**

As of Date: [03/12/2009] [3]

Information found on the PI Report

Upper left hand corner...

Award: PeopleSoft number assigned to a sponsored program – main or contract number
Award Name: Name of the project
Award Dept: Department of PI
Agency: Awarding agency
Award PI (Principal Investigator): Name of the individual who is conducting the research
Award Start Date: State date of award
Award End Date: End date of award

Upper right hand corner...

Project: PeopleSoft number assigned to a project under an award.
Project Dept: Department of PI
F&A Rate: The percentage of F&A that is being collected by the institution.
Project PI: Principal Investigator
Project Start Date: Start date of project
Project End Date: End date of Project
Fund Code: Fund assigned to Award or Project by Grant Officer.

Report ID: SFRNDU101PC

University of North Dakota
PI Summary Status
Sponsor Funding Report
As of February 25, 2009.

Page No. 1
Run Date 02/25/2009
Run Time 09:36:57

AWARD: UNDD0011037
AWARD NAME: Family-to-Family Network CSHS 07-09
AWARD DEPT: 8240 Rural Health

PROJECT: UNDD0013856
PROJECT NAME: Family to Family Network
PROJECT DEPT: 2640 Social Work

AGENCY: ND Department of Health
AWARD PI: Conway, Patricia Gail
AWARD START DATE: 07/01/2007
AWARD END DATE: 06/30/2009

FEA RATE: 8.000
PROJECT PI: Conway, Patricia Gail
PROJ START DATE: 04/08/2008
PROJ END DATE: 05/01/2008
FUND CODE: 43300 Public Service

There are seven columns on the PI Report, each gives different information about the project.

Budget: Amount awarded.

Current Mo. Expenses: Current month's expenditures from the 1st to the **As of Date** entered.

Cumulative Expense: Cumulative Expenses through the **As of Date** entered.

Outstanding Encumbrances: Amounts of encumbrances not expended.

Available Budget: Remaining amount available from the budget amount.

Percent available: Available budget as a percentage.

EXPENSE DESCRIPTION	BUDGET	CURRENT MO EXPENSES	CUMULATIVE EXPENSES	OUTSTANDING PRE-ENCUMB	OUTSTANDING ENCUMBRANCE	AVAILABLE BUDGET	PERCENT AVAILABLE
TOTAL PERSONNEL EXPENSE	13,721.18	0.00	4,764.68	0.00	0.00	8,956.50	65.27
Travel	400.36	0.00	12.50	0.00	0.00	387.86	96.88
Supplies	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Food and Clothing	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bldg, Grounds, Vehicle Supply	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Miscellaneous Supplies	980.00	0.00	0.00	0.00	0.00	980.00	100.00
Office Supplies	0.00	0.00	504.80	0.00	0.00	(504.80)	0.00
Postage	0.00	0.00	22.44	0.00	0.00	(22.44)	0.00
Printing	0.00	0.00	15.23	0.00	0.00	(15.23)	0.00
Minor Equipment	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Utilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Insurance	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Rents & Leases	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Repairs	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IT Communications	535.22	(54.00)	244.03	0.00	0.00	291.19	54.41
Professional Development	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Operating Fees and Services	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Professional Fee & Services	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Medical, Dental, & Optical	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Miscellaneous Expenses	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Miscellaneous Expenses	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Subcontractor	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Interest Expense	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Cost of Goods Sold	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL OPERATING EXPENSE	1,915.58	(54.00)	799.00	0.00	0.00	1,116.58	58.29
Waivers, Scholar & Fellow	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL WAIVERS, SCH & FELLOW	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Capital Asset Expense	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Equipment	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL EQUIPMENT EXPENSE	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL DIRECT COST	15,636.76	(54.00)	5,563.68	0.00	0.00	10,073.08	64.42
PEA	1,251.49	(4.32)	445.04	0.00	0.00	806.45	64.44
TOTAL PEA EXPENSE	1,251.49	(4.32)	445.04	0.00	0.00	806.45	64.44
GRAND TOTAL	16,888.25	(58.32)	6,008.72	0.00	0.00	10,879.53	64.42

Budget Overview

Navigation: Commitment Control-Review Budget Activities-Budget Overview

If this is your first time running Budget Overview, please go to Setting Up a Run Control.

Click Search

Select Run Control ID

Enter Business Unit: Example UNND01

Enter or Select Ledger Group/Set: Ledger Group

Enter or Select Ledger Group: GNTDTL

Enter Project under Chartfield Project under columns Chartfield From Value, and Chartfield To

Select Save

Select Search

*Business Unit: UNND01 Ledger Group/Set: Ledger Group

View Stat Code Budgets

Display Chart

TimeSpan

*Type of Calendar: Detail Budget Period

Ledger Group: GNTDTL

Grant Detail Ledger Group

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	First	Last
<input checked="" type="checkbox"/>	GNTDTL				<input checked="" type="checkbox"/>	1 of 1	

ChartField Criteria	ChartField From Value	ChartField To	ChartField Value Set	Update/Add	Budget Status
Account	%	%		Update/Add	<input checked="" type="checkbox"/> Open
Dept	%	%		Update/Add	<input checked="" type="checkbox"/> Closed
Fund	%	%		Update/Add	<input checked="" type="checkbox"/> Hold
PC Bus Unit	%	%		Update/Add	
Project	UNND0013375	UNND0013375		Update/Add	
Activity	%	%		Update/Add	

Budget Overview

Overview Page- an up to date overview of the project in regards to the budget that is set up, cumulative expenses incurred, outstanding encumbrances, and Available Budget.

Budgets Overview

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Menu

Search:

- ▷ My Favorites
- ▷ Supplier Contracts
- ▷ Customers
- ▷ Customer Contracts
- ▷ Vendors
- ▷ Purchasing
- ▷ eProcurement
- ▷ Grants
- ▷ Program Management
- ▷ Project Costing
- ▷ Proposal Management
- ▷ Billing
- ▷ Accounts Receivable
- ▷ Accounts Payable
- ▷ Asset Management
- ▷ Banking
- ▷ Commitment Control
 - ▷ Budget Journals
 - ▷ Post Control Budget Journals
- ▷ Review Budget Activities
 - Budget Details
- Budgets Overview
 - Ledger Inquiry Set
 - Activity Log
 - Review Fund Source Allocations
 - Review Fund Source Activities
 - Close Budget
 - Budget Reports
 - Review Budget Check Exceptions
 - General Ledger
 - SCM Integrations
 - Set Up Financials/Summary

Home | Worklist | Add to Favorites | Sign o
New Window | Help | Customize Page

Inquiry Results

Budget Overview

Business Unit: UNND01
Ledger Group: GNTDTL Grant Detail Budget
Type of Calendar: Detail Budget Period
Amounts in Base Currency: USD
Revenue Associated

Return to Criteria

Ledger Totals (2 Rows)

Max Rows:

Net Transfers:

0.00

Budget: 539,844.67
Expense: 510,841.48
Encumbrance: 29,003.19
Pre-Encumbrance: 0.00
Budget Balance: 0.00
Associate Revenue: 0.00
Available Budget: 0.00

Award Profile

Navigation: Grants – Awards – Award Profile
 Enter Business Unit
 Enter Award ID
 Select Search

Award Profile page lists the Project Number, Agency Award number, Title of project, Award PI, Sponsor, Start Date and End Date.

By selecting the Funding tab located on upper portion of the screen, you can see the full amount awarded under a project number with the start and end dates.

- ▶ My Favorites
- ▶ Supplier Contracts
- ▶ Customers
- ▶ Customer Contracts
- ▶ Vendors
- ▶ Purchasing
- ▶ eProcurement
- ▶ Grants
- ▶ Sponsor Websites
- ▶ Opportunity
- ▶ Proposals
- ▼ Awards

Award Profile

- Project
- Project Activity
- Project Budgets
- Project Budget Inquiry
- Commitment Control Errors
- Negotiate Award
- Process Facilities Admin
- Create Continuation
- Review Award Modifications
- FA Error Interactive Report
- Milestone Notification
- Process Milestone Notification
- ▶ Protocols
- ▶ Institutions
- ▶ Departments
- ▶ Professionals
- ▶ Sponsors
- ▶ Subrecipients
- ▶ Interactive Reports
- Grants Center
- My Proposals
- ▶ Program Management

Award

Funding

Resources

Certifications

Terms

Milestones

Key Words

Funding Inquiry

Award ID: UNDD0013375

Reference Award

8-603001-Z-0036-19

Number:

Title: ND Small Business Development Center 2008 Cooperative Ag

Award PI: Wikenheiser, Bonita Marie

Description

Sponsor: Small Business Administration

Purpose: OTHER

Status: Accepted

Award Type: Grant

CFDA: 59.037

Proposal ID: UNDD0013375

Version ID: F1

Start Date: 01/01/2008

End Date: 12/31/2008

[View Contract](#)

[View Proposal](#)

[Additional Information](#)

[Grant Administrator](#)

[Sponsor Website](#)

Primary Project PI: Wikenheiser, Bonita Marie

Associated Project	Project	Description	Customize	Find	First	1-4 of 4	Last
PC Business Unit							
UNDD01	UNDD0013375	ND Small Business Development					
UNDD01	UNDD0014183	Steve Moser SBA					
UNDD01	UNDD0014184	David Flynn SBA					
UNDD01	UNDD0014326	Inv. of IT Strategic Implement					

Project Page

Navigation: Grants – Awards – Project
 Enter Business Unit
 Enter Project
 Select Search

Project page lists the Project, Description, type of funding, Start and End Dates, and a descriptions of what is or is not allowable.

General Information		Project Department		Project Costing Definition		Manager		Location		Phases		Approval	
Project: UNDD0013375		Add to My Projects											
*Description: ND Small Business Development		<input type="checkbox"/> Program		Processing Status: Active									
*Integration: UNDD01		University of North Dakota		Project Status: Approved									
*Project Type: FED		FEDERAL REVENUE											
Percent Complete: 0.00		As Of:											
Project Health:		As Of:											
Project Schedule													
*Start Date: 01/01/2008		*End Date: 12/31/2008		Additional Dates									
Description													
Date/Time Stamp: 04/25/08 9:43:50AM		User ID: dnelson											
Description: Travel, supplies, contractual, consultants, communication, data processing, rent/lease, fees, professional development ok													
Long Description:													

Go To: [My Projects](#) [Project Valuation](#) [Project Team](#) [Project Activities](#) [More](#)

[Save as Template](#) [Copy Project](#)

Team

Team Detail

Project: UNDD0013375 Description: ND Small Business Development Processing Status: Active

Start Date: 01/01/2008 End Date: 12/31/2008

Project Team Members

EmpID	Name	Project Role	Project Manager	Email Notify	Start Date	End Date	First	1-2 of 2	Last
[Redacted]	Bonita Wilkohliser	PI			12/12/2007	12/31/2008	[+]		[-]
[Redacted]	Christin Nelson	GCA			12/12/2007	12/31/2008	[+]		[-]

The Grant Officer of a project can be found by selecting the Project team hyperlink located at the bottom of the screen. The Grant Officer has the project Role of GCA.

Adding a Favorite

By adding a favorite a user can create a shortcut that allows them to go directly to the desired screen versus though the complete navigation.

Once on a screen you would like to make a favorite such as the PI Report
Select the following navigation: My favorites - Add to favorites

The Add to Favorites Page will appear. In the description box enter a name of the screen that is easily identifiable to you. Example: HE PI Report.

Select OK

Verify the favorite was created by selecting My Favorites from the Menu.

Add to Favorites

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Add to Favorites

Please Enter a Unique Description for this Favorite

*Description: