

University of Rhode Island PeopleSoft Grants 9.1

Grants Portal

User Procedures

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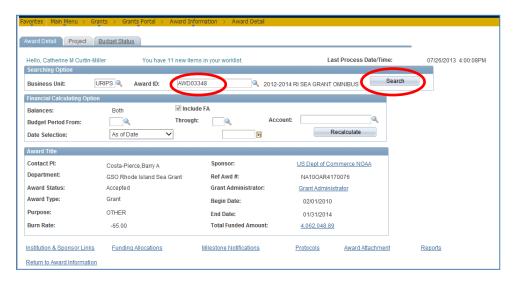
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Overview

Grants Portal provides indicative and financial information and about awards and projects. It allows tracking by award and/or project and segregates expenditures, encumbrances, and pre-encumbrances by sponsor and cost share. The portal includes transactions that are not recorded as financial transactions for the university such as cost share facilities and administration (F&A or indirect cost or overhead), waived F&A, and third party expenditures. The portal also includes billing and payment information on grants (which is done at the Award ID level (URI AWD#).

Award Information

Use the award pages to view information for the entire award and associated projects.



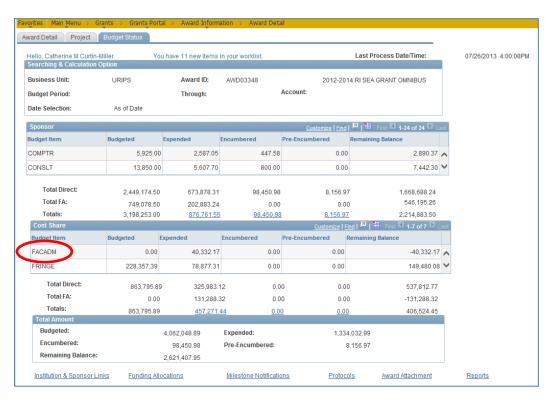
Enter the Award ID and click the Search button.

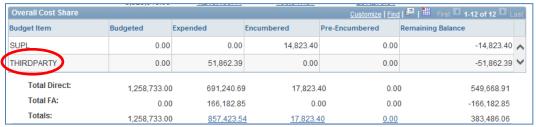
Use the options under Financial Calculating Option to filter financial information. Click the Recalculate button.

Links under the Award Title section lead to other pages outside of the portal. Links at the bottom of the page are not enabled at this time.



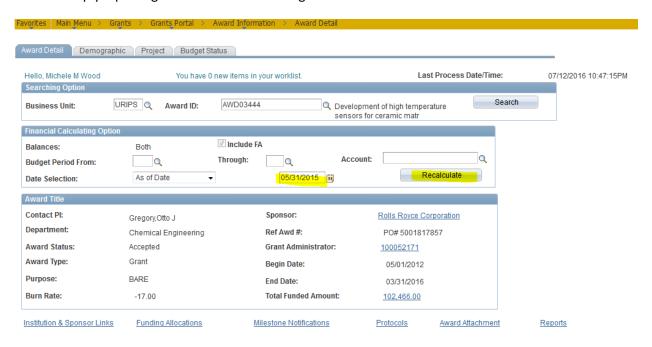
The Project tab shows the associated projects associated with the award. Click the Project link to transfer to the Project Information section of the Grants Portal. The Activity links are not enabled at this time.

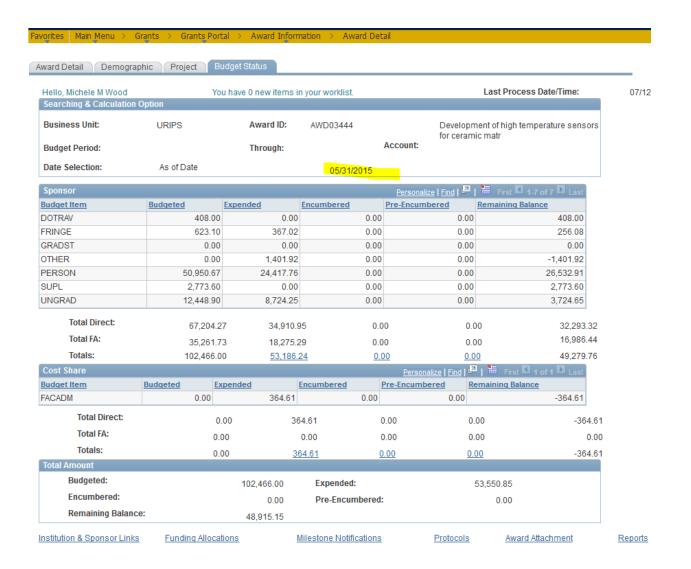




The Budget Status tab shows budgets, expenditures, encumbrances, and pre-encumbrances by budget item. The data on this page is populated nightly and is not taken from Commitment Control.

- Budget Items are established at the proposal stage and carried through to the Grants Portal.
- FACADM under Cost Share section is waived Facilities & Administration (F&A, indirect cost, overhead).
- THIRDPARTY under Cost Share section is comprised of third party expenditures that are entered manually by the Office of Sponsored Projects (OSP).
- Use the scroll arrows to scroll through the budget items. Use the Download icon download the results to Excel.
- You may also look at the Budget Status page using an end date other than the current date by simply inputting an end date and clicking recalculate:

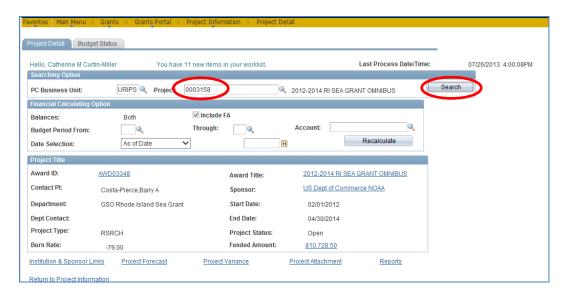




Use caution when clicking the Totals links on the award when multiple projects are associated. You could experience performance latency. Instead, view detailed transactions at the project level.

Project Information

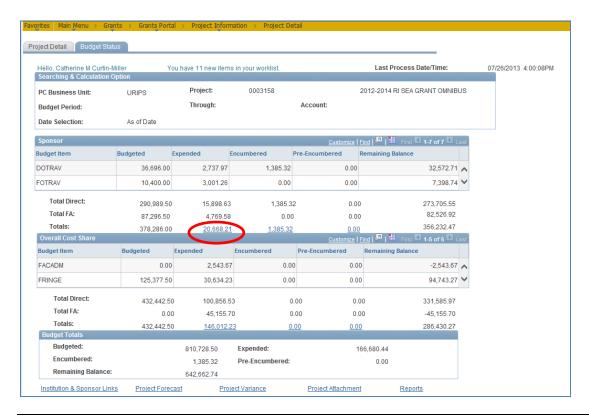
Use the project pages to view information for an individual project.



Enter the Project and click the Search button.

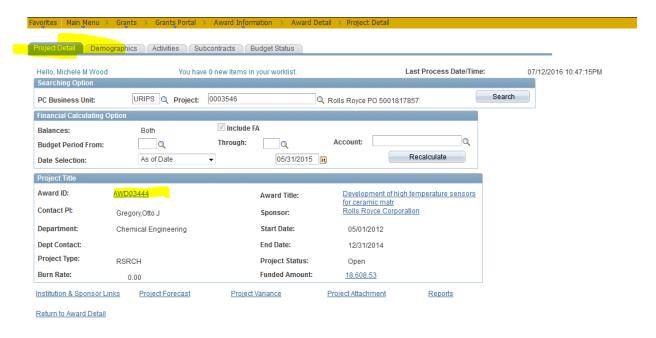
Use the options under Financial Calculating Option to filter financial information. Click the Recalculate button.

Links under the Project Title section lead to other pages outside of the portal *except for Award ID which* leads back to the Award pages in the Grants Portal – see screen shot below. Links at the bottom of the page are not enabled at this time.



Information on the Budget Status tab is the same as the award except on the individual project. Drill to the details using the Totals links on this page.

In order to navigate back to the Award ID after working in the Project tabs, go back to the Project Detail tab and click on the Award ID:



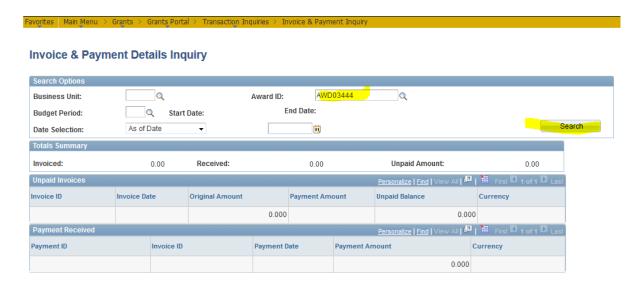
Transaction Inquiries

Transaction inquiries can be a useful tool to obtain details on invoicing, expenditures, etc.

For Invoicing:

Navigate to Grants/Grants Portal/Transaction Inquiries/Invoice and Payment Inquiry.

Input the **Award ID** then click **Search** as shown below:



Once you have clicked search, the information below will populate. If there are more than 2 invoices, you will need to click on the button "View All" and use the scroll bar to view all the invoices. You may also click on the spreadsheet grid which will produce a table of all the information that you may save to Excel. Additionally payment details are provided – see the screens below:

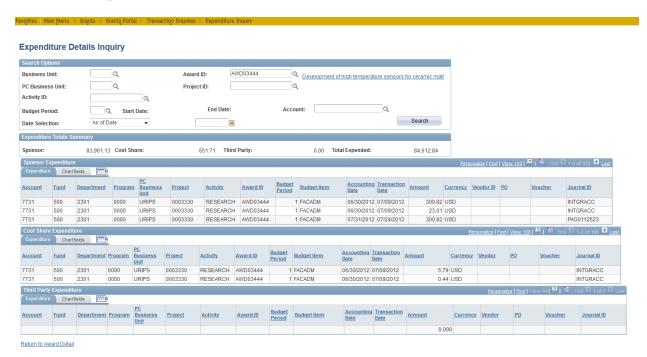




This concludes the section on Invoice & Payment Details Inquiry.

For Expenditure Inquiry:

For Expenditure Details, please see screen shots below. In this case you can search either with the Award ID or Project ID as shown below:



Expenditure Details Inquiry Business Unit: Award ID: URIPS @ 0003158 PC Business Unit: Project ID: 2012-2014 RI SEA GRANT OMNIBUS Activity ID: 0 End Date: As of Date Search 146,012.23 Third Party: Sponsor: 20,668.21 Cost Share: Total Expended 166,680.44 Project Activity Award ID Budget Iten 7731 2812 URIPS 0003158 RESEARCH AWD03348 1 FACADM 04/30/2012 04/17/2012 7731 500 2812 0000 URIPS RESEARCH AWD03348 1 FACADM 05/01/2012 0003158 04/30/2012 < Activity 7731 URIPS 1 FACADM 500 2812 0000 0003158 RESEARCH AWD03348 04/30/2012 04/17/2012 > Activity

If you are searching by project you will need to enter Business Unit and PC Business Unit as well:

To view details transactions, use the Transaction Inquiries menu to search Expenditures, Encumbrances, and Pre-encumbrances. Enter Search Options and click the Search button. Notice the total for Third Party and a separate section for Third Party transactions. There will only be values in the Third Party transactions if these are populated by Office of Sponsored Projects for cost share reporting purposes.

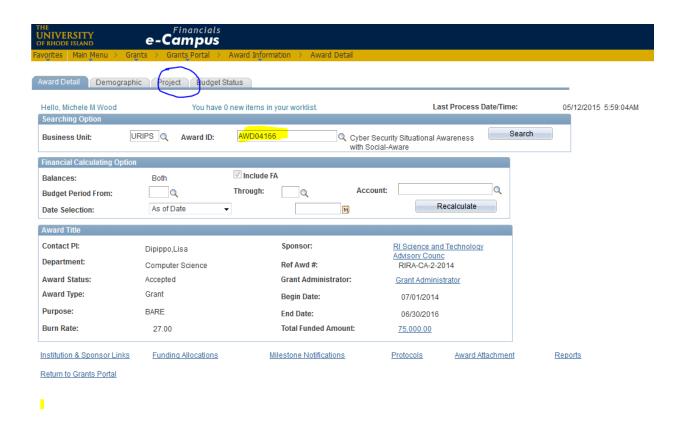
This concludes the section on Expenditure Inquiry.

Accessing Attachments

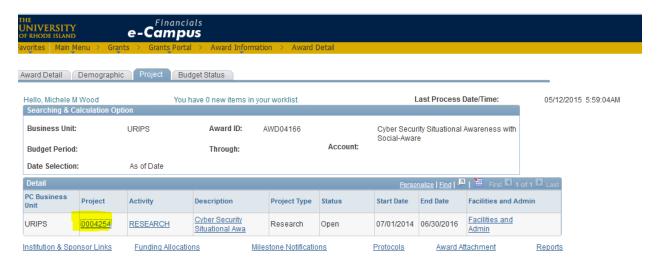
The portal provides links to project attachments, which are the award documents saved electronically by Office of Sponsored Projects. Attachments include Research Action Notices (RANs) and supporting documentation.

Navigate to Grants/Grants Portal/Award Detail.

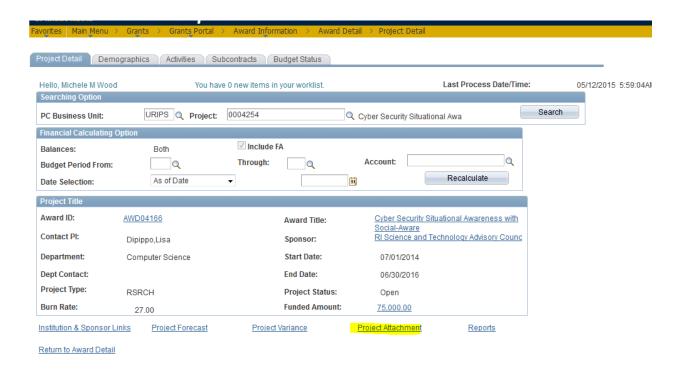
Input the **Award ID** then click **Search** then click the **Project Tab** as shown below:



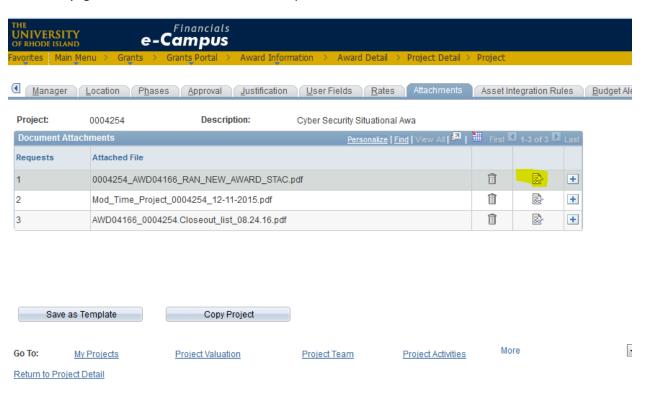
Click on the **Primary** project, which is the first project in the list:



Click on the Project attachment link at the bottom of the page – this will bring you to the place where the award documents are stored:

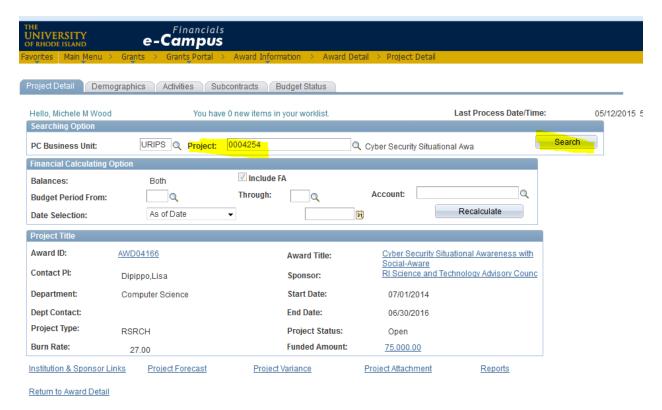


Click the eyeglass icon and the documents will open:



When you are ready to navigate back to the portal, click on "Return to Project Detail" at the bottom of the screen.

Please note the project number is not still populated. Fill in the project number and click search and your session will be restored.



FAQ

- 1. Why do I receive "You are not authorized to access this component" message?

 This message means that you have not been granted security access to the underlying pages in PeopleSoft as URI doesn't currently use the functionality. These pages may be implemented in future releases.
- 2. What is the difference between FACADM (facilities & administration or indirect cost or overhead) budget item and the Total FA in the cost share section of Budget Status? FACADM is waived F&A. Currently budgets for waived F&A are not carried to the Grants Portal.
- 3. What is THIRDPARTY budget item?

 Third party expenditures are entered by the Office of Sponsored Projects (OSP). These are not University financial transactions; therefore they are displayed for reporting purposes only.

 Currently budgets for third party are not carried to the Grants Portal.
- 4. Why aren't amounts appearing on the Budget Status page?

 You must click the Search button on the Project Detail or the Award Detail page. Then amounts will appear.
- 5. Why don't the amounts on the Budget Status page tie to Budgets Overview?

 Grants Portal does not load information from Commitment Control (Budgets Overview). Data in Grants Portal comes directly from the feeder systems (e.g. General Ledger, Purchasing, Payables, etc.).
- 6. Why can't I see today's transactions in the Grants Portal?

 Grants Portal gets loaded by a nightly staging process. Data reflected will be from the prior day.
- 7. How do I determine if my grant has been billed and how current the billing is?

 To determine if your grant has been billed, follow the navigation provided above for Invoice & Payment Inquiry. If there are Invoice ID's listed, then the grant has been billed. To determine how current, you may look at the invoice date, or compare total billed to total expenditures (see Budget Status page in the Grants Portal).
- 8. What does the invoice date represent?

 The invoice date is the date the invoice was produced. Typically invoices are produced in the month following. For example, an invoice date of 8/14/15 would represent an invoice for the month of July.
- 9. What does an invoice with CNV mean?

 These are invoices that were originally produced under the ACCESS billing system and were therefore converted (CNV) when PeopleSoft billing was implemented in June 2015.