



PeopleSoft 9.2
University of South Carolina

Grant Dashboard Report

USC Steps to Run the University Grant Dashboard Report

Office of Contracts & Grants
July 5, 2016

The Grants Dashboard report is a printable output file that provides the supporting details of the Grants section of the University Dashboard. Users should note the following when running the Grant Dashboard report:

- The total project budget will be captured, regardless of the Accounting Dates used in the run control parameters. Pre-Encumbrances, Encumbrances, Expenses and Cost Share Expenses will only be captured for the accounting dates that are used in the run control parameters.
- When selecting **“All”** as the Project Status, **“All”** projects related to your criteria, regardless of its status, will be retrieved.
- When selecting **“Active”** as the Project Status, only projects with an **“Active”** status related to your criteria will be retrieved.
- When selecting **“Inactive”** as the Project Status, only projects with an **“Inactive”** status related to your criteria will be retrieved.
- When running the report by **“Project”** leave the **“Project Status”** blank.
- When report is run by **“Award ID”** output will be sorted by Project ID if multiple projects exist on the Award.
- When report is run by **“Department”** or **“Award PI Name”** output will be sorted by Award ID & Project ID if multiple Awards and/or Projects exist.

Navigation: USC Enhancements > Grant Dashboard Report

1. Click Add a New Value tab. (The next time the Grant Dashboard Report is run the user can click “SEARCH” and select the Run Control ID that was created for the Grant Dashboard Report.)

The screenshot shows the 'Grant Dashboard Report' search interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', and 'USC Enhancements > Grant Dashboard Report'. Below this is the University of South Carolina logo and the page title 'Grant Dashboard Report'. The main content area has a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two buttons: 'Find an Existing Value' and 'Add a New Value'. A red arrow points to the 'Add a New Value' button. Below the buttons is a 'Search Criteria' dropdown menu. The search criteria is set to 'Run Control ID begins with' with an input field. There is a 'Case Sensitive' checkbox which is unchecked. At the bottom, there are 'Search' and 'Advanced Search' buttons. At the very bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

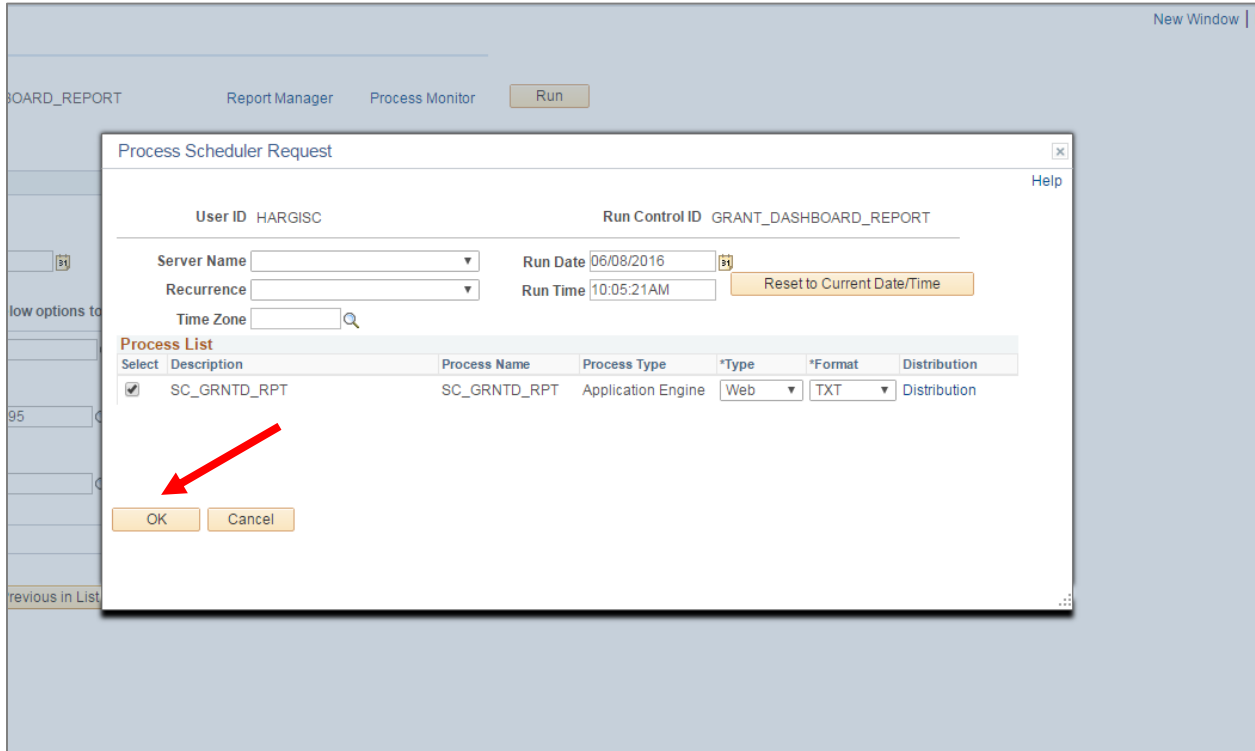
2. Name your Run Control. Click ADD.

University of South Carolina Grant Dashboard Report interface. The 'Run Control ID' field is highlighted with a red box and contains the text 'GRANT_DASHBOARD_REPORT'. A red arrow points to the 'Add' button below it.

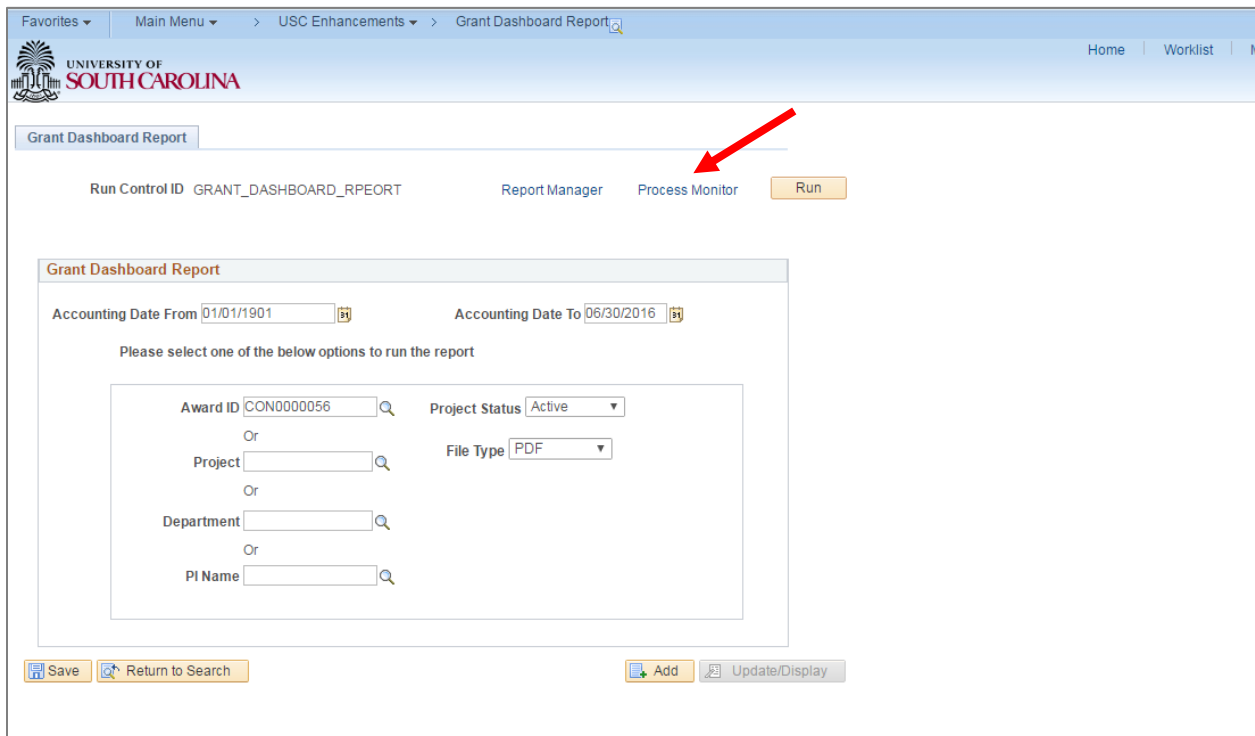
3. Enter the “Accounting Date From” and “Accounting Date To” for the period that needs to be reviewed. The Grants Dashboard report can be run by Award ID, Project ID, Department or Award PI Name and the search can include All, Active or Inactive projects. Click RUN.

University of South Carolina Grant Dashboard Report interface. The 'Accounting Date From' and 'Accounting Date To' fields are highlighted with a red box. The 'Run' button is also highlighted with a red arrow. Below, the search options for Award ID, Project, Department, and PI Name are visible, along with the Project Status dropdown set to 'Active'.

4. Click OK.



5. Click the Process Monitor hyperlink.



6. When Run Status is "Success" click on the Details hyperlink.

Process Monitor interface showing a list of processes. The 'Process List' table is displayed with the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	301035		Application Engine	SC_GRNTD_RPT	HARGISC	06/08/2016 10:05:21AM EDT	Success	Posted	Details

A red arrow points to the 'Details' hyperlink in the 'Details' column of the table.

7. Click on the View Log/Trace hyperlink.

Process Detail dialog box showing process information and actions. The 'View Log/Trace' hyperlink is highlighted with a red arrow.

Process Information:

- Instance: 301035
- Name: SC_GRNTD_RPT
- Run Status: Success
- Type: Application Engine
- Description: SC_GRNTD_RPT
- Distribution Status: Posted

Run Information:

- Run Control ID: GRANT_DASHBOARD_REPORT
- Location: Server
- Server: PSUNX
- Recurrence: (empty)

Date/Time Information:

- Request Created On: 06/08/2016 10:07:13AM EDT
- Run Anytime After: 06/08/2016 10:05:21AM EDT
- Began Process At: 06/08/2016 10:07:19AM EDT
- Ended Process At: 06/08/2016 10:07:44AM EDT

Actions:

- Parameters
- Transfer
- Message Log
- View Locks
- Batch Timings
- View Log/Trace

Update Process actions:

- Hold Request
- Queue Request
- Cancel Request
- Delete Request
- Re-send Content
- Restart Request

8. Click on the PDF hyperlink.

The screenshot shows a 'Process Detail' window with a 'View Log/Trace' dialog box open. The dialog box contains the following information:

Report

Report ID	189044	Process Instance	356971	Message Log
Name	SC_GRNTD_RPT	Process Type	Application Engine	
Run Status	Success			

SC_GRNTD_RPT

Distribution Details

Distribution Node	DNODE	Expiration Date	07/12/2016
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File List

Name	File Size (bytes)	Datetime Created
AE_SC_GRNTD_RPT_356971.stdout	503	07/05/2016 2:17:59.597378PM EDT
AE_SC_GRNTD_RPT_356971.trc	2,423	07/05/2016 2:17:59.597378PM EDT
SC_GRT_DB_AW.pdf	19,235	07/05/2016 2:17:59.597378PM EDT

Distribute To

Distribution ID Type	*Distribution ID
User	HARGISC

[Return](#)

9. User can now Print or Save Grant Dashboard report.



GL Dashboard Report

Run By: Award
From Accounting Date: 01/01/1901
To Accounting Date: 06/30/2016

Run Date: 07/05/2016

Award Information

Award ID:	CON0000056	Award Description:	Data Translation and Interpretation, Evaluation, R	Award PI Name	ANA LOPEZ-DEFEDE
Award Start Date	07/01/2007	Award End Date:	06/30/2017	Sponsor	SC Department of Health & Human Services

Department Information

Department ID:	100100
Department Name	INST FAMILIES IN SOCTY

Project Information

Project ID:	10002042	Project Description:	Independent Program Evaluation	PI Name:	ANA LOPEZ-DEFEDE
Start Date:	09/02/2010	End Date:	06/30/2017	Indirect Cost Rate:	0.00
Grant Number:		Dept/Fund	10010LA01	Project Status	Active

Transaction Detail	Budget	Expense	PreEncumbrance	Encumbrance	Remaining Balance
51200-CLASSIFIED POSITIONS	\$0.00	\$2,245.68	\$0.00	\$0.00	(\$2,245.68)
51321-TEMP GRANTS FAC POST DOC APPPOI	\$0.00	\$3,274.63	\$0.00	\$0.00	(\$3,274.63)
51410-TEMPORARY HELP NON-STUDENT	\$0.00	\$4,000.00	\$0.00	\$0.00	(\$4,000.00)
51900-FRINGE BENEFITS	\$0.00	\$2,841.46	\$0.00	\$0.00	(\$2,841.46)
51901-STATE RETIREMENT STATE EMPLOYE	\$0.00	\$0.24	\$0.00	\$0.00	(\$0.24)
52024-USC EMPLOYEE TRAVEL DOMESTIC	\$0.00	\$3,085.62	\$0.00	\$0.00	(\$3,085.62)
52031-TELEPHONE TOLL CHARGES	\$0.00	\$22.46	\$0.00	\$0.00	(\$22.46)
52032-TELEPHONE & NETWORK SERVICES	\$0.00	\$93.75	\$0.00	\$0.00	(\$93.75)
52043-REPAIRS TO BUILDINGS-USC WORK	\$0.00	\$330.53	\$0.00	\$0.00	(\$330.53)
52051-PRINTING-USC WORK	\$0.00	\$10.00	\$0.00	\$0.00	(\$10.00)
52070-CONTRACTUAL SERVICES	\$0.00	\$1,202.00	\$0.00	\$0.00	(\$1,202.00)
53002-EDUCATIONAL SUPPLIES	\$0.00	\$1,005.00	\$0.00	\$0.00	(\$1,005.00)
53004-DATA PROCESSING SUPPLIES	\$0.00	\$1,044.07	\$0.00	\$0.00	(\$1,044.07)
53005-FOOD SUPPLIES	\$0.00	\$2,408.18	\$0.00	\$0.00	(\$2,408.18)
53006-OTHER SUPPLIES	\$0.00	\$831.06	\$0.00	\$0.00	(\$831.06)
53031-DATA PROCESSING SOFTWARE-UNDER	\$0.00	\$9.99	\$0.00	\$0.00	(\$9.99)
54110-CONTRIBUTIONS AND DUES	\$0.00	\$2,150.00	\$0.00	\$0.00	(\$2,150.00)
54525-GRADUATE ASSISTANT TUITION SUP	\$0.00	\$15,589.00	\$0.00	\$0.00	(\$15,589.00)
Total Direct Cost	\$0.00	\$40,143.67	\$0.00	\$0.00	(\$40,143.67)
Total Indirect Cost	\$0.00	\$0.00			\$0.00
Total Cost	\$0.00	\$40,143.67	\$0.00	\$0.00	(\$40,143.67)

Cost Share

Cost share	Budget	Actuals	Balance
51000-SALARIES	\$5,000.00	\$0.00	\$5,000.00
51202-STAFF RETIREMENT INCENTIVE	\$0.00	\$225.66	(\$225.66)
51305-RESEARCH SALARY SUPPLEMENT	\$0.00	\$200.00	(\$200.00)
52020-TRAVEL	\$2,000.00	\$0.00	\$2,000.00
52022-STUDENT TRAVEL	\$0.00	\$100.00	(\$100.00)
52024-USC EMPLOYEE TRAVEL DOMESTIC	\$0.00	\$101.61	(\$101.61)
Total Direct Cost Share	\$7,000.00	\$627.27	\$6,372.73
Total Indirect Cost Share	\$0.00	\$0.00	\$0.00
Total Cost Share	\$7,000.00	\$627.27	\$6,372.73

Outstanding Balance

PreEncumbrance								
Req ID	Req Name	Req Date	Req Status	Account	Fund Code	Department	Operating Unit	Amount
Total Outstanding Amount								\$0.00
Encumbrance								
PO ID	Req ID	PO Date	PO Status	Account	Fund Code	Department	Operating Unit	Amount
Total Outstanding Amount								\$0.00