


PeopleSoft

KUMC

**Grant Information
Procedural Reference**

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Throughout this manual, the  symbol indicates additional information on the left side of the page.

OVERVIEW

Overview

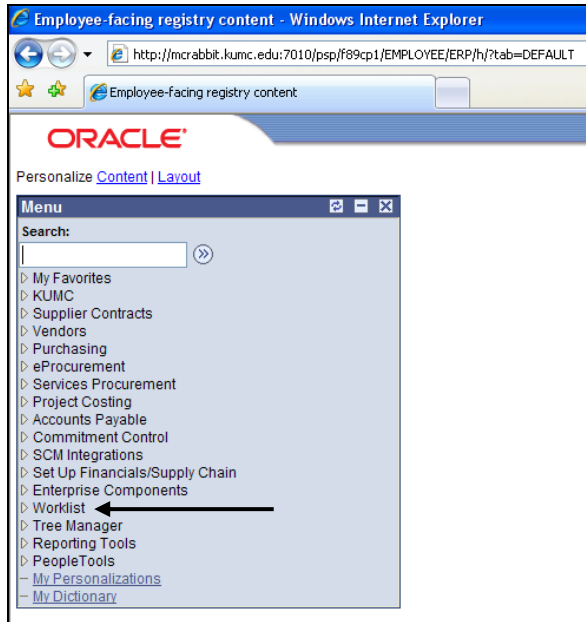
Within PeopleSoft, there are several sets of pages for viewing grant information. These include the Overall Grant Summary and Grant Inquiry pages within the Grant Information group of processes. Overall Grant Summary displays a summary of the grant budget which includes the overall grant amount, encumbered and expended amounts, and the spending authority remaining. Although this same data is displayed on the AM90/91 report, the Overall Grant Summary provides a mechanism for quickly viewing the information.

The Grant Inquiry pages display general information such as the grant start and end dates, grant manager and information related to the awarding agency. For Research Institute grants, there are additional pages related to grant administration.

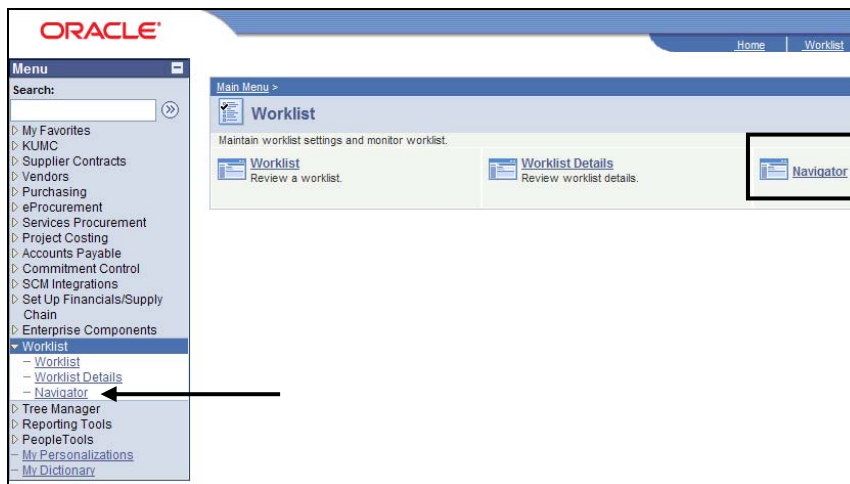
In addition to the inquiry pages, the PTD (Project to Date) Expense Report details monies expended from a grant since its start date. This report is accessed through the Financial Reports group of processes.

DISPLAYING THE NAVIGATION ICONS

Navigation



1. Click **Worklist** in the menu.

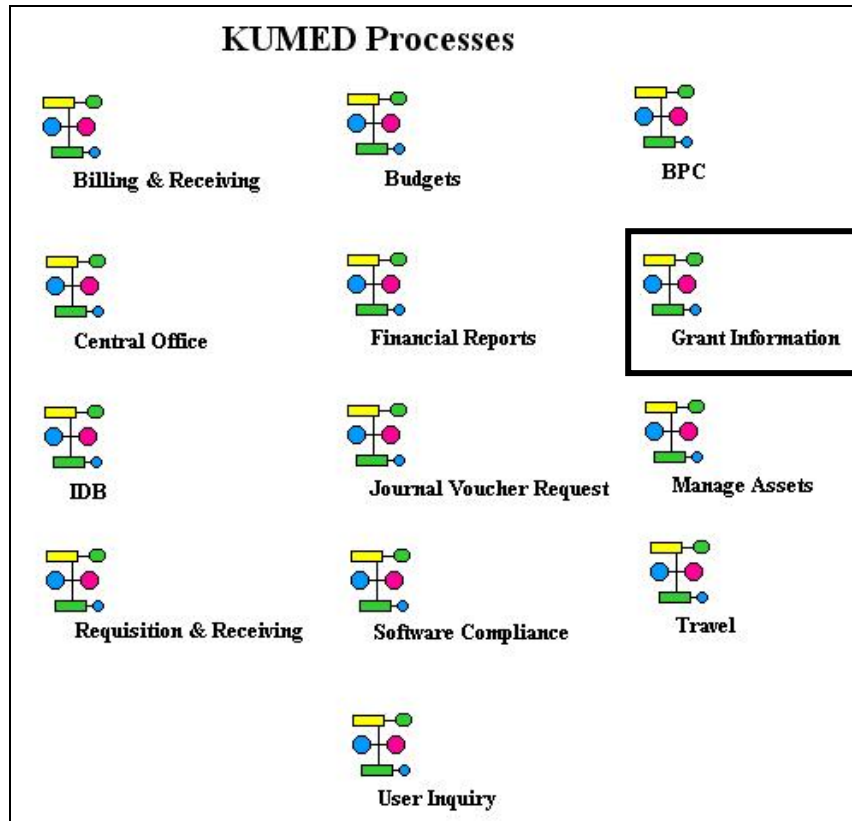


2. Click **Navigator** icon or menu item.

OVERALL GRANT SUMMARY

Overall Grant Summary displays the grant direct award, its amounts encumbered and expensed, and the direct award balance, as well as Facilities & Administration award and its expense information. In addition, the page displays budget information by summary account code. The data on this page may be printed.

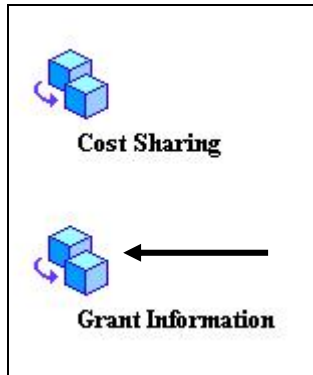
Navigation



1. Click **Grant Information** icon.

OVERALL GRANT SUMMARY

Navigation (continued)



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

Find an Existing Value

Business Unit: =

Project: begins with

[Basic Search](#)

2. Click **Grant Information** icon.

3. Click **Overall Grant Summary** icon.

4. Select KUMED or RINST in **Business Unit** field.

5. Enter **Project (Grant)** number.

6. Click .

OVERALL GRANT SUMMARY

View Data

Overall Grant Status

Project: G125 Overeating BU: KUMED ?

Manager: Start: 08/01/1996 Direct Award: 74,394.75

Agency ID: 5 K07 NR00053-03 End: 05/02/2002 D/C Exp: 72,129.27

Issuing Agcy: NURSING RESEARCH (NINR) Proj End: Direct Awd Bal: 2,265.48

Chart Fields

Fund: 2601 Dept: 11401 Program: 71000

Tot Enc Bal: -209.00


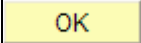
F & A Award: 5,732.54

F & A Exp: 5,732.00

Acct	Description	Budget Amt	Expense	Balance
1005	Salary and Wages	62,739.24	51,374.85	11,364.39
1745	Fringe Benefits		11,053.26	-11,053.26
2000	Other Operating Expenses	6,388.25	3,266.34	3,121.91
2500	Travel	5,001.76	4,554.61	447.15
2660	Tuition for Employees		607.50	-607.50
3001	Supplies	265.50	1,272.71	-1,007.21
9800	Facility and Administration	5,732.54	5,732.00	0.54

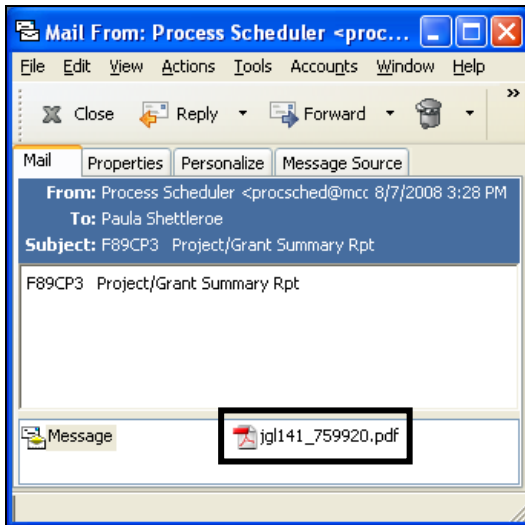
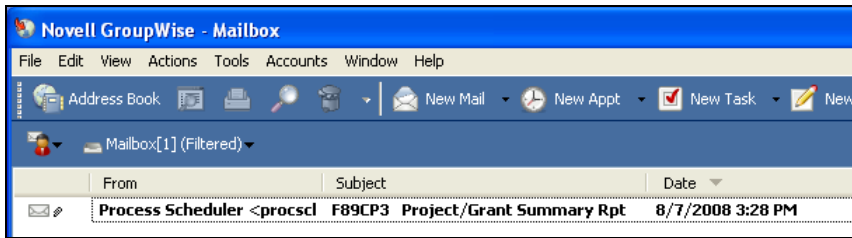
Report will be emailed to you

OK Cancel

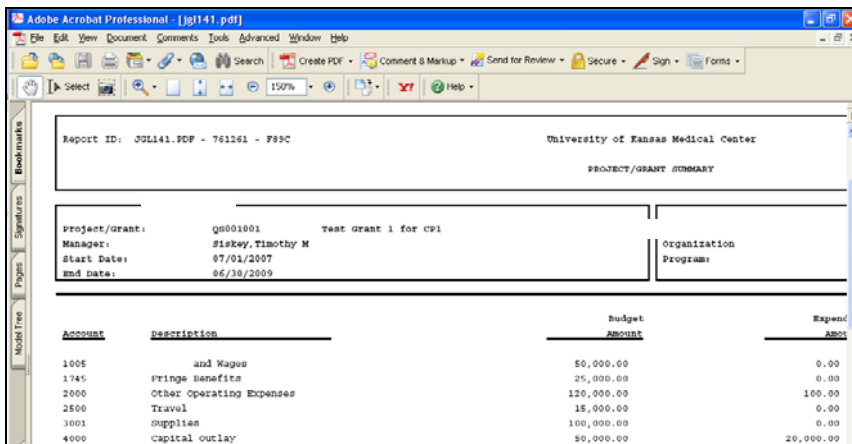
1. PeopleSoft displays the overall grant status.
2. Do you want to print a report of the data?
If **no**, go to step 6.
If **yes**, go to step 3.
3. Click  (KUMED Print Push Button).
4. A message box appears.
5. Click  .
6. Click [KU_PROCESSES](#) to return to navigation icons.

OVERALL GRANT SUMMARY

Print Report



Step 2 Right-click the attachment, choose **Open** from menu.



1. Open email containing report.

2. Open **.pdf** attachment.

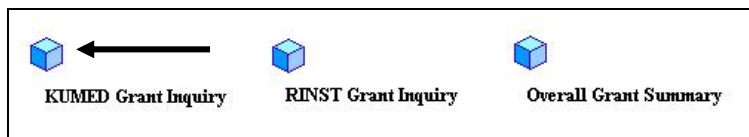
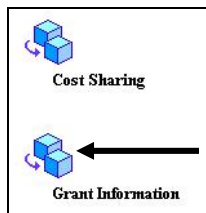
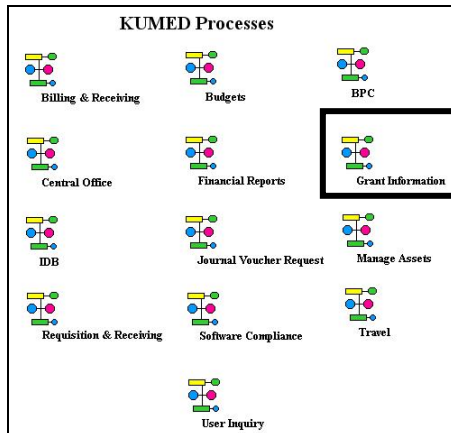
3. Click (Print).

4. Click to close PDF Viewer window.

KUMED GRANT INQUIRY

The KUMED Grant Inquiry page displays general information such as the grant start and end dates, grant manager and information related to the awarding agency.

Navigation



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

Find an Existing Value

Business Unit:

Project:

Include History

[Basic Search](#)

1. Click **Grant Information** icon.
2. Click **Grant Information** icon.
3. Click **KUMED Grant Inquiry** icon.
4. Enter **Project (Grant)** number.
5. Click .

KUMED GRANT INQUIRY

View Data

Panel
tabs →

Project/Grant Grant Attrib KU Project Attrib KU

Set ID KUMED Project G125

Scroll Area Find | View All First 1 of 3 Last

Effective Date: 06/30/2004 Status: Inactive

Description: Overeating


Project/Grant Type: Grant Project/Grant Status: Approved


Start Date: 08/01/1996 End Date: 05/02/2002

Manager Name: EmplID:

Scroll Area Find | View All First 1 of 1 Last

Description

1. PeopleSoft displays the first of three panels of information on the grant.
2. Click the tab for the panel you wish to view. 
3. Click [KU_PROCESSES](#) at any time to return to navigation icons.

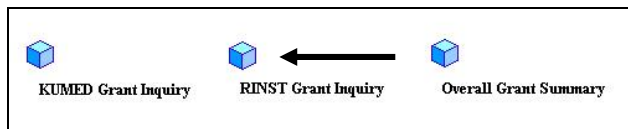
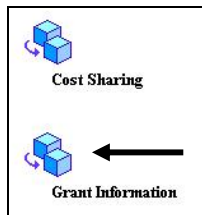
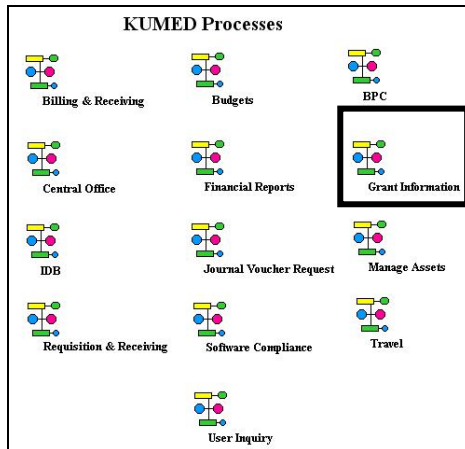
 **Step 2** The end date shown on the **Project/Grant** panel may be up to 90 days after the actual project end date. This is set intentionally to allow extra time at the end of the grant for processing invoices and payments that were encumbered during the grant. The actual project end date is displayed on the **Grant Attrib KU** tab.

If a panel contains an effective date field, there may be multiple lines of data with different effective dates. Use the Scroll Area navigation bar **1** to view additional lines.

RINST GRANT INQUIRY

The RINST Grant Inquiry page display general information such as the grant start and end dates, grant manager and information related to the awarding agency.

Navigation



Project/Grants RINST Only
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit: [=]

Project: begins with [v]

Include History

[Basic Search](#)

1. Click **Grant Information** icon.
2. Click **Grant Information** icon.
3. Click **RINST Grant Inquiry** icon.
4. Enter **Project (Grant)** number.
5. Click .

RINST GRANT INQUIRY

View Data

Panel
tabs →

Project/Grant Grant Attrib KU Project Attrib KU Administration Bill To Info

Set ID RINST Project QS001001

Scroll Area Find | View All First 1 of 1 Last

Effective Date: 01/01/1900 Status: Active

Description: Test Grant 1 for CP1

Project/Grant Type: Grant Project/Grant Status: Approved

Start Date: 07/01/2007 End Date: 06/30/2008

Manager Name: Siskey, Timothy M EmpID: J0000065886

Scroll Area Find | View All First 1 of 1 Last


Description

Step 2 The end date shown on the **Project/Grant** panel may be up to 90 days after the actual project end date. This is set intentionally to allow extra time at the end of the grant for processing invoices and payments that were encumbered during the grant. The actual project end date is displayed on the **Grant Attrib KU** tab.

If a panel contains an effective date field, there may be multiple lines of data with different effective dates. Use the Scroll Area navigation bar **1** to view additional lines.

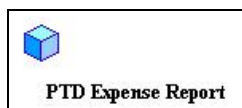
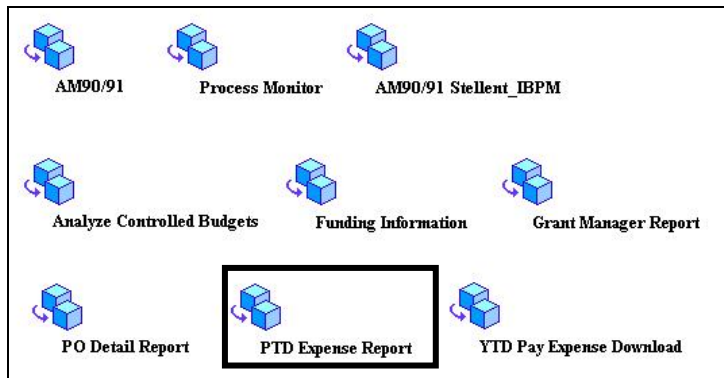
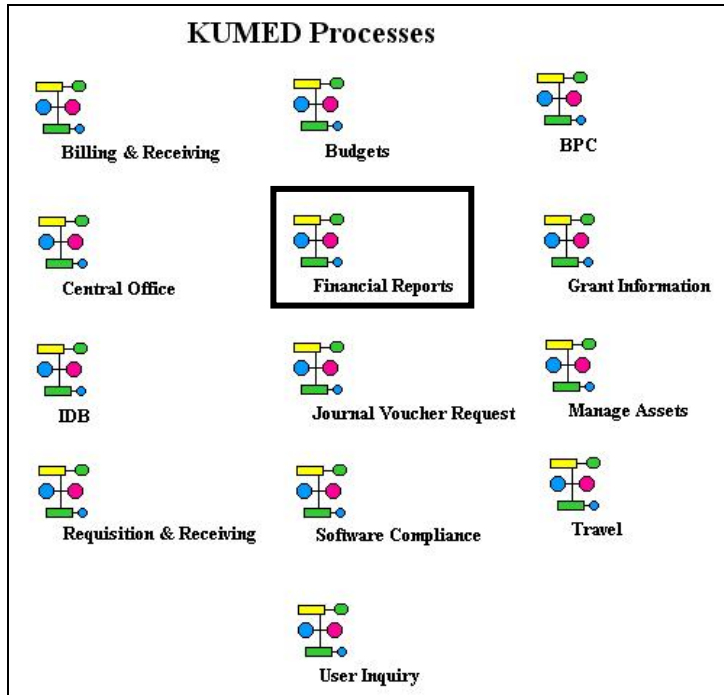
1. PeopleSoft displays the first of eleven panels of information on the grant.

Project/Grant	Closure
Grant Attrib KU	Authorization
Project Attrib KU	CT Authorization
Administration	Box Storage Info
Bill To Info	Grant Personnel Commitments
Project Invoices	

2. Click the tab of the panel you wish to view. 
3. Click [KU_PROCESSES](#) at any time to return to navigation icons.

THE PTD (PROJECT TO DATE) EXPENSE REPORT

Navigation



1. Click **Financial Reports** icon.

2. Click **PTD Expense Report** icon.

3. Click **PTD Expense Report** icon.

THE PTD (PROJECT TO DATE) EXPENSE REPORT

Run Control

Grant Expense Report (~AM91)

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](#) ←

Run Control ID:

Case Sensitive

[Search](#)

[Clear](#)

[Basic Search](#)

[Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Search Results

[View All](#) [First](#) [1-3 of 3](#) [Last](#)

Run Control ID	Language Code
Office	English
Testing reports	English

Step 3 If only one Run Control is found, PeopleSoft displays the Selection Criteria page.

Grant Expense Report (~AM91)

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

Step 4 Run Control IDs cannot contain spaces or special characters.

1. Have you previously created a Run Control for this report?
If **no**, click Add a New Value and go to Step 4.
If **yes**, go to Step 2.

2. Click [Search](#).

3. Click desired run control name and go to Step 1 of Selection Criteria. 

4. Complete the **Run Control ID** field. 

5. Click [Add](#).

THE PTD (PROJECT TO DATE) EXPENSE REPORT

Selection Criteria

Grant Expense Rpt

Run Control ID: reports [Report Manager](#) [Process Monitor](#) **Run**

Grant Expense Report (~AM91)

Business Unit:

SpeedType:

The Results Of This Process Will Be E-mailed To You

Set Process Scheduler Request As Follows:

Server Name = PSUNX Type = FILE
Format = PDF
See Process Monitor For Run Status

Process Scheduler Request

User ID: PSHETTLEROE Run Control ID: reports

Server Name: Run Date:

Recurrence: Run Time:

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Output Destination
<input checked="" type="checkbox"/>	Qry JGL_GRANT_EXP_SAM	JGL081	SQR Report	File	PDF	

Step 4 Process Name for PTD Expense report is JGL081.

Grant Expense Rpt

Run Control ID: reports [Report Manager](#) [Process Monitor](#) **Run**

Process Instance: 763827

Grant Expense Report (~AM91)

Business Unit:

SpeedType:

1. Select **Business Unit**.
2. Enter **SpeedType**.
3. Click .

4. The Server Name defaults correctly to PSUNX.
5. Click .

PeopleSoft returns to the Criteria Page. You know that you have run the report because the **Process Instance** number displays below the button.

The report will be emailed when complete.

6. Click [KU_PROCESSES](#) at any time to return to navigation icons.

THE PTD (PROJECT TO DATE) EXPENSE REPORT

Optional: to check the progress of your report, you can launch the Process Monitor. Reports are automatically emailed when complete.

Process Monitor

1. Click **Process Monitor** link.

This will display the Process List which shows the progress of generating the report.

Step 2 Most recent report requested is at the top of the list.

2. Note **Run Status**.

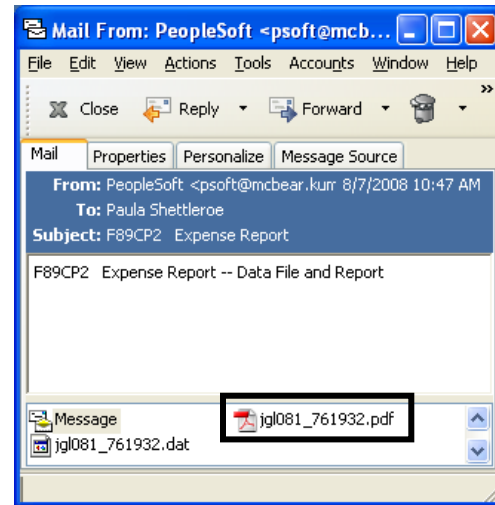
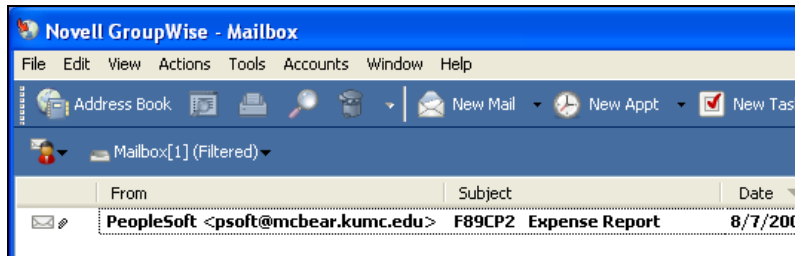
Run Status	Description
Queued	Report is in line to be processed
Initiated	Report has started
Processing	Report is in process
Posting	Report is being finalized
Success	Report is emailed
Error	Report failed

Click **Refresh** until Run Status displays Success. (May need to wait a few minutes and refresh again.)

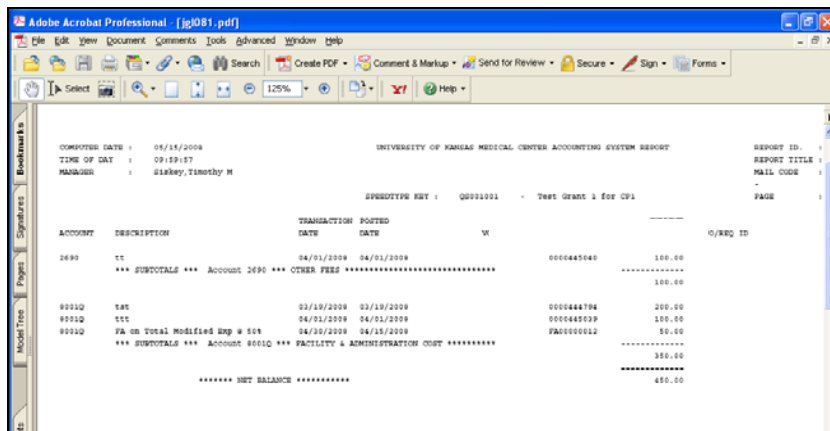
3. Click [KU_PROCESSES](#) to return to navigation icons.

THE PTD (PROJECT TO DATE) EXPENSE REPORT

View Report



Step 2 Right-click the attachment, choose **Open** from menu.



1. Open email containing report.

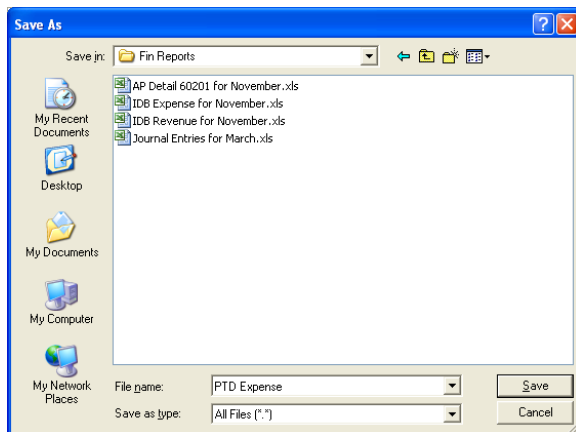
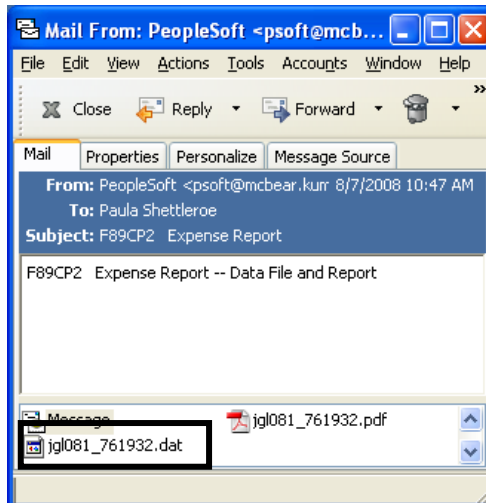
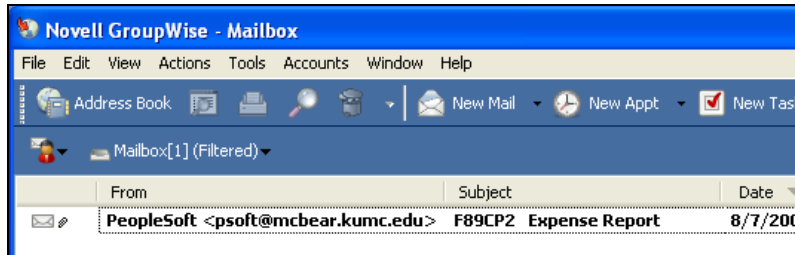
2. Open **.pdf** attachment.


3. Click (Print).

4. Click to close PDF Viewer window.

THE PTD (PROJECT TO DATE) EXPENSE REPORT

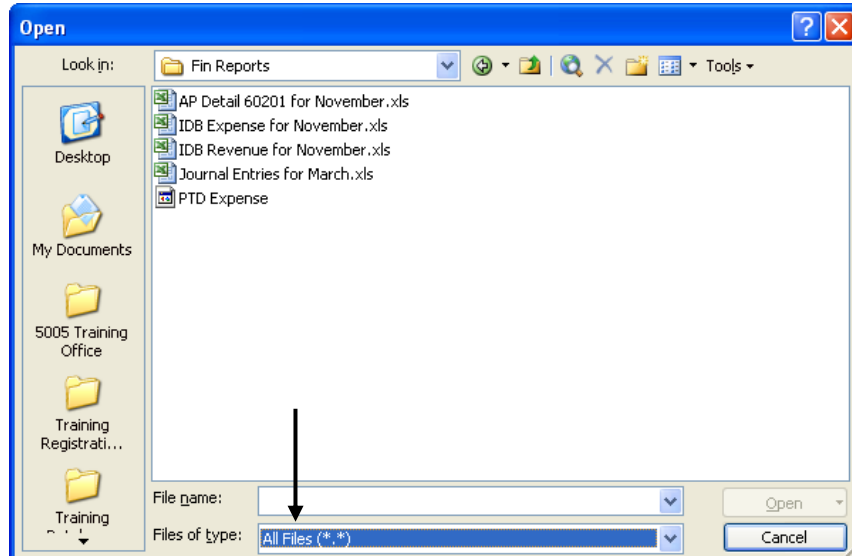
View Report in Excel


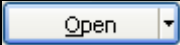


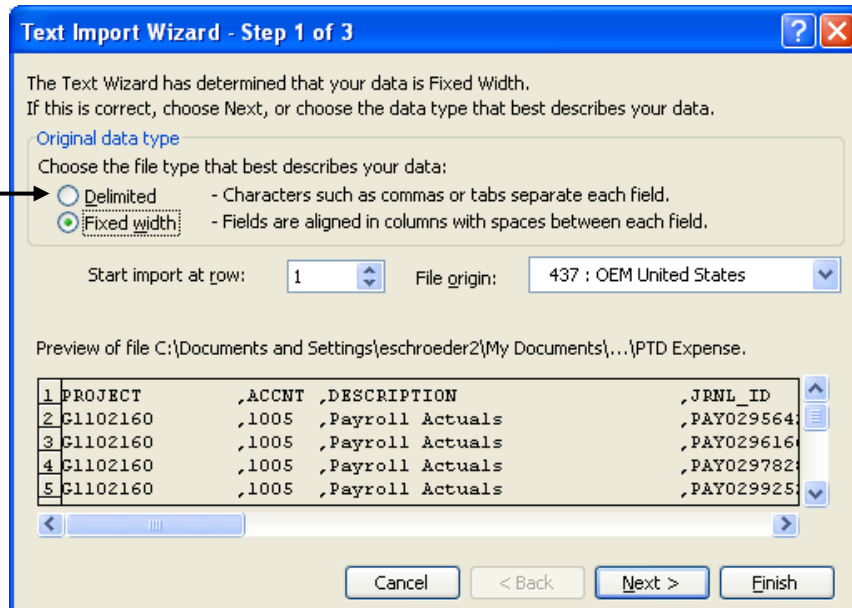
1. Open email containing report.
2. Right-click **.dat** attachment.
3. Choose **Save As...** from the menu.
4. Navigate to desired folder.
5. Modify filename if desired.
6. Click .

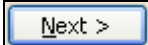
THE PTD (PROJECT TO DATE) EXPENSE REPORT

Open File in Excel



1. Start Excel.
2. Click  (Open).
3. Change **Files of type** to All Files.
4. Select the **.dat** file saved during step 6 in the previous section and click . The Text Import Wizard will launch.



5. Click **Delimited** radio button.
6. Click .

THE PTD (PROJECT TO DATE) EXPENSE REPORT

Open File in Excel (continued)

Text Import Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

Tab Semicolon Comma
 Space Other:

Treat consecutive delimiters as one

Text qualifier:

Data preview

PROJECT	ACCNT	DESCRIPTION	JRNL_ID
G1102160	1005	Payroll Actuals	PAY0295642
G1102160	1005	Payroll Actuals	PAY0296166
G1102160	1005	Payroll Actuals	PAY0297828
G1102160	1005	Payroll Actuals	PAY0299252

Cancel < Back Next > Finish

7. Click **Comma** check box.

8. Click **Next >**.

Text Import Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

Advanced...

Column data format

General
 Text
 Date:
 Do not import column (skip)

Data preview

General	General	General	General
PROJECT	ACCNT	DESCRIPTION	JRNL_ID
G1102160	1005	Payroll Actuals	PAY0295642
G1102160	1005	Payroll Actuals	PAY0296166
G1102160	1005	Payroll Actuals	PAY0297828
G1102160	1005	Payroll Actuals	PAY0299252

Cancel < Back Next > Finish

9. Click **Finish**. The data will display in a spreadsheet.

THE PTD (PROJECT TO DATE) EXPENSE REPORT

Open File in Excel *(continued)*

	A	B	C	D	E	F	G	H	I	J	
	PROJECT	ACCNT	DESCRIPTION	JRNL_ID	JRNL_DAT	POSTED	FUND	DEPTID	PROG	CLASS	MTD
2	G11nnnnn	1005	Payroll Ac	PAY02956	7/2/2004	7/7/2004	2601	11007	71000		\$
3	G11nnnnn	1005	Payroll Ac	PAY02961	7/16/2004	7/13/2004	2601	11007	71000		\$
4	G11nnnnn	1005	Payroll Ac	PAY02978	7/30/2004	7/28/2004	2601	11007	71000		\$
5	G11nnnnn	1005	Payroll Ac	PAY02992	8/13/2004	8/9/2004	2601	11007	71000		\$
6	G11nnnnn	1005	Pay or RF	RFA03259	5/2/2005	5/2/2005	2601	11007	71000		##
7	G11nnnnn	1005	Payroll Ac	PAY03267	5/6/2005	5/5/2005	2601	11007	71000		##
8	G11nnnnn	1005	Payroll Ac	PAY03282	5/20/2005	5/19/2005	2601	11007	71000		##
9	G11nnnnn	1005	Pay or RF	RFA03302	6/1/2005	6/1/2005	2601	11007	71000		##
10	G11nnnnn	1005	Payroll Ac	PAY03302	6/3/2005	6/2/2005	2601	11007	71000		##
11	G11nnnnn	1005	Pay or RF	RFA03326	6/16/2005	6/16/2005	2601	11007	71000		\$
12	G11nnnnn	1005	Payroll Ac	PAY03319	6/17/2005	6/13/2005	2601	11007	71000		##
13	G11nnnnn	1005	Pay or RF	RFA03330	6/17/2005	6/17/2005	2601	11007	71000		##
14	G11nnnnn	1005	Pay or RF	RFA03330	6/30/2005	6/17/2005	2601	11007	71000		##
15	G11nnnnn	1005	Pay or RF	RFA03360	6/30/2005	6/23/2005	2601	11007	71000		##
16	G11nnnnn	1005	Pay or RF	RFA03360	6/30/2005	6/23/2005	2601	11007	71000		##
17	G11nnnnn	1005	Pay or RF	RFA03373	6/30/2005	6/30/2005	2601	11007	71000		##
18	G11nnnnn	1005	Pay or RF	RFA03393	6/30/2005	6/30/2005	2601	11007	71000		##
19	G11nnnnn	1005	Pay or RF	RFA03443	8/5/2005	8/5/2005	2601	11007	71000		##
20	G11nnnnn	1005	Payroll Ac	PAY03443	8/12/2005	8/8/2005	2601	11007	71000		\$
21	G11nnnnn	1005	Payroll Ac	PAY03451	8/15/2005	8/15/2005	2601	11007	71000		\$
22	G11nnnnn	1005	Payroll Ac	PAY03456	8/26/2005	8/23/2005	2601	11007	71000		\$
23	G11nnnnn	1005	Payroll Ac	PAY03469	9/9/2005	9/6/2005	2601	11007	71000		\$
24	G11nnnnn	1005	Payroll Ac	PAY03499	9/23/2005	9/16/2005	2601	11007	71000		\$

10. Format as desired.

11. Click  (Print).

12. Click  to close Excel.

APPENDIX

Assistance

Questions regarding how to utilize the PeopleSoft panels, how to navigate, and other technical or procedural problems with the system should be directed to PeopleSoft Support at ext. **8-1121**.

The office is usually staffed from 8:00 AM to 4:30 PM. In the event no one is available to assist, you may leave your question on the office Audix voice mail system, and we will return your call.