

1. Report Name: Grant Budget Status

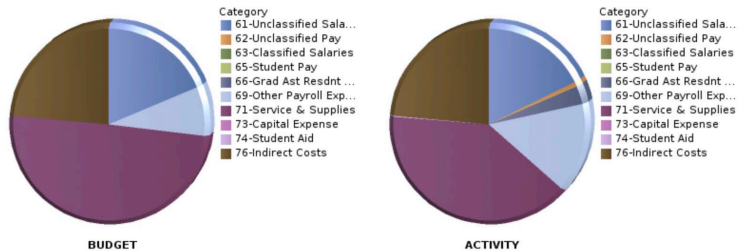
- Location: Finance --> Grant Reports --> Grant budget Status
- Information Provided: Grant budget, spending, and current available balance.
- How to run:
 - Type in the grant number (ends in zero)
 - Click "finish"
- How it looks:
 - The top has pie charts with budget and spending

Grant Budget Status

Grant ID 217180 Mechanical Regulation of Vascular Growth and Remodeling



UNIVERSITY OF OREGON



- The bottom has budget, spending, and encumbrances

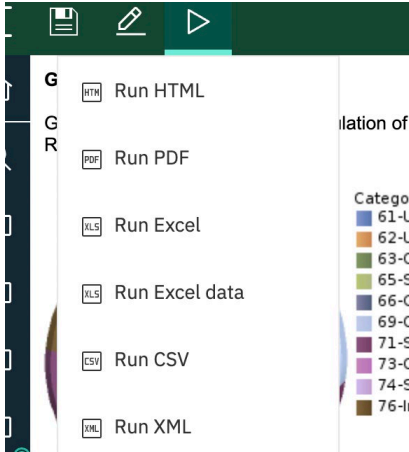
Grant 217420		Revenue		Start Date May 1, 2020		End Date Apr 30, 2025				
Category	Grant	Fund	Account	Description	Budget	Activity	Encumbrance	Balance	% Remaining	
61-Unclassified Salaries	217420	217421	10100	Unclassified Salaries	318,981	0.00	0.00	318,981.00		
	217420	217421	10103	Admin Salaries	0	34,646.24	15,625.00	-50,271.24		
	217420	217421	1010C	Other NTTF and Non-TRP Retiree	0	11,049.23	0.00	-11,049.23		
	217420	217421	1010E	Contingent Rsch-Career NTTF	0	88,343.88	40,878.73	-129,222.61		
	217420	217421	1010F	Contingent Rsch-Other NTTF/Retiree	0	69,035.87	1,371.00	-70,406.87		
	217420	217421	10179	Admin Retro Sal Inc Pay	0	99.61	0.00	-99.61		
61-Unclassified Salaries - Total					318,981	203,174.83	57,874.73	57,931.44	18%	
65-Student Pay	217420	217421	10501	Student Pay - Regular Pay	0	4,965.68	0.00	-4,965.68		
65-Student Pay - Total					0	4,965.68	0.00	-4,965.68	-	
66-Grad Ast Resdnt Phys Dentist Cl Fel	217420	217421	10620	Graduate Teaching Assistants	0	42,241.99	25,308.54	-67,550.53		
	217420	217421	10625	Summer-Graduate Research Assts	0	15,466.81	1,406.03	-16,872.84		
66-Grad Ast Resdnt Phys Dentist Cl Fel - Total					0	57,708.80	26,714.57	-84,423.37	-	
69-Other Payroll Expenses	217420	217421	10900	Other Payroll Expenses (OPE)	186,888	0.00	0.00	186,888.00		
	217420	217421	10922	OPE Blended 12 mth Faculty/OAs	0	78,091.46	31,558.38	-109,649.84		
	217420	217421	10923	OPE Blended 9 mth Faculty/Exec	0	54,077.76	8,481.01	-62,558.77		
	217420	217421	10929	OPE Blended Students	0	2,471.27	694.58	-3,165.85		
	217420	217421	10941	Grad Emn Health Insurance Benefit	0	13,093.00	0.00	-13,093.00		
	217420	217421	10952	Grad Employee Fee Remission Subsidy	0	3,584.25	0.00	-3,584.25		
69-Other Payroll Expenses - Total					228,514	177,471.74	40,733.97	10,308.29	5%	
71-Service & Supplies	217420	217421	20000	Services & Supplies Expense	134,161	0.00	0.00	134,161.00		
	217420	217421	20101	Office & Administrative Supplies	0	31.74	0.00	-31.74		
	217420	217421	20103	Laboratory Supplies	0	63,426.55	0.00	-63,426.55		
	217420	217421	20200	Minor Equipment (under \$5,000/unit)	0	26,818.58	0.00	-26,818.58		
	217420	217421	20201	Computer and IT Peripherals <\$5,000	0	1,899.00	0.00	-1,899.00		
	217420	217421	21008	Animal Care	0	14,804.95	0.00	-14,804.95		
	217420	217421	22505	Express Mail	0	125.00	0.00	-125.00		
	217420	217421	22511	Freight/Moving-Not Employee Related	0	23.50	0.00	-23.50		
	217420	217421	22599	Miscellaneous Postage & Shipping	0	753.34	0.00	-753.34		
	217420	217421	24203	Software Subscr/Lic Svcs-Fixed Term	0	6,564.00	0.00	-6,564.00		
	217420	217421	24606	Printing & Publishing	0	7,030.00	0.00	-7,030.00		
	217420	217421	24617	Non-medical Laboratory Services	0	19,318.48	0.00	-19,318.48		
	217420	217421	25012	Laboratory Reagents	0	171.00	0.00	-171.00		
	217420	217421	35000	Travel	13,024	0.00	0.00	13,024.00		
	217420	217421	39902	Subcont/Subgmt A up to Incl \$25K	25,000	25,000.00	0.00	0.00		
	217420	217421	39910	Subcont/Subgmt <=\$25K prior Jul-01	0	0.00	0.00	0.00		
	217420	217421	39920	Subcont/Subgmt >\$25K prior Jul-01	0	0.00	0.00	0.00		
	217420	217421	39921	Subcont/Subgmt A in Excess of \$25K	449,693	278,453.40	0.00	171,239.60		

- iii. The balance will reflect budget minus activity, minus encumbrances. Note, it does not encumber F&A.

76-Indirect Costs - Total	322,073	276,966.24	0.00	45,066.76	14%
Overall - Total	1,491,448	1,164,679.83	125,323.27	201,444.90	14%

e. Tips for use:

- i. If you would like to put it into Excel, you can do so by clicking what looks like a “play” button on the top left.



2. Grant Transaction Certification report

- a. Location: Finance --> Grant Reports --> Grant Transaction Certification
- b. Information provided:
 - i. Detailed transaction of spending, either to date or based on a selected time period.
 - ii. Looks like FZITRND but cleaner
- c. How to run:
 - i. Select the fiscal year and period, or provide the beginning and end dates

Fiscal Year:	<input type="text" value="Select a Fiscal Year"/>
Fiscal Period:	<input type="text" value="Select a Fiscal Period"/>
OR	
Begin Transaction Date:	<input type="text"/> mm/dd/yy
End Transaction Date:	<input type="text"/> mm/dd/yy

- ii. Choose if you want to include labor.

Transactions:

☒ Services and Supplies
☐ Labor and Services and Supplies

- iii. Input the grant number or index number.
- iv. If you use the grant number, click “insert” to move it to the right column.
- v. If you use the index, clicking “reprompt” will populate the FOAPAL. C

Grant(s):

Insert ➔

➔ Remove

OR

Index:

Reprompt

- d. Click “Finish”
- e. How it looks:

Grant Transaction Certification



Transaction Dates: 08/01/22 - 08/31/22
Fiscal Period:

Index: 281741 ED IES ROOTS 625 CLARKE TURTURA
 Organization: 632625 Ed CTL Research Grants
 Fund: 281741 ED IES ROOTS 625 CLARKE TURTURA
 Program: 15001 Individual or Project Rsch
 Activity: YCLARB Clarke, Ben

Account	Account Description	Date	Document	Description	Amount
22505	Express Mail	31-Aug-2022	ZF038261	8/16 UPS 1Z9457690300038760	(45.80)
22505	Express Mail	31-Aug-2022	ZF038261	8/16 UPS 1Z9457690300038779	(45.80)
22505	Express Mail	31-Aug-2022	ZF038261	8/16 UPS 1Z9457690300038788	(21.46)
22505	Express Mail	31-Aug-2022	ZF038261	8/16 UPS 1Z9457690300038797	(45.80)
22505	Express Mail	31-Aug-2022	ZF038261	8/16 UPS 1Z9457690300038804	(45.80)
22505	Express Mail	31-Aug-2022	ZF038261	8/16 UPS 1Z9457690300038813	(45.81)
22505	Express Mail	31-Aug-2022	ZF038261	8/16 UPS 1Z9457690300038822	(45.81)
22505	Express Mail	31-Aug-2022	ZF038261	8/16 UPS 1Z9457690300038831	(45.80)
22505	Express Mail	31-Aug-2022	ZF038261	8/16 UPS 1Z9457690300038840	(45.81)
22505	Express Mail	31-Aug-2022	ZF038261	8/16 UPS 1Z9457690300038859	(45.77)
22505	Express Mail	31-Aug-2022	ZF038261	8/18 UPS 1Z9457694200038884	(60.32)

- f. Tips for use:
 - i. Can be sent out automatically – monthly is recommended.
 - ii. Can be used to get PI approval of monthly transactions
 - iii. Typically, people like to exclude labor to keep it cleaner and use effort reporting to have PIs review and approve those working on their grants.

3. Report Name: Faculty Spending

- a. Location: Finance --> Grant Reports --> Faculty Spending

- b. Information Provided
 - i. List of PI's grants
 - ii. Shows burn rate
 - iii. Can also show non-grants
- c. How to run:
 - i. Select the Fiscal Year
 - ii.

Summary Filters	<input checked="" type="checkbox"/> Include Fiscal Year to Date Summary
Report Filters	<input checked="" type="checkbox"/> Include Encumbrances
	<input checked="" type="checkbox"/> Include ASA Funds
	<input checked="" type="checkbox"/> Include ICC Funds
	<input checked="" type="checkbox"/> Include Grants
	<input checked="" type="checkbox"/> Include Department Start-Up Programs

- iii.
- d. How it looks:
 - i. Sponsored funds will be placed at the top

Grant Funds Summary - Inception to Date

Grant ID	Grant	Start Date	End Date	Budget	Budget Committed	ITD Activity
241450	U PITTSBURGH NIH 422 ALLEN	8/1/17	4/30/22	138,433	(26,142.94)	(143,106.44)
2420A0	RFMH NIH 1022 ALLEN	12/1/19	10/31/22	231,302	(67,037.42)	(187,536.04)
2420L0	RFMH NIH 620 ALLEN	7/1/19	6/30/20	40,307	0.00	(40,305.19)
2426K0	U PITTSBURGH NIH 526 ALLEN	6/1/21	5/31/26	73,162	(83,510.95)	(46,896.60)
281450	NIH U01 MAPS 723 ALLEN	9/1/18	7/31/23	3,554,072	(43,440.49)	(2,631,500.75)
290450	UC SAN DIEGO NIH 420 ALLEN	3/1/19	4/14/20	10,002	0.00	(10,002.00)
4134J0	GOOGLE VICO FP 323 ALLEN	3/9/21	3/8/23	380,500	(81,425.79)	(210,710.95)
4409G0	SRCD JACOBS FDN 421 ALLEN	10/25/18	4/30/21	21,000	0.00	(16,340.88)
Total				4,448,778	(301,557.59)	(3,286,398.85)

Other Funds Summary - Fiscal Year to Date

Fund	Fund Description	Program	Program Description	Index	Index Description	Budget	Bu
4409G0	SRCD JACOBS FDN 421 ALLEN	10/25/18	4/30/21	21,000	0.00	(16,340.88)	
Total				4,448,778	(301,557.59)	(3,286,398.85)	

- ii. Other funds will be following the sponsored funds.

Other Funds Summary - Fiscal Year to Date

Fund	Fund Description	Program	Program Description	Index	Index Description	Budget	Budget Committed	YTD Activity	Balance
001100	General Fund - Tuition and Fees	0ASA	ASA Academic Support			4,838	0.00	0.00	4,838.00
001100	General Fund - Tuition and Fees	0CUP06	CAS Dept Rsch Start-Up 06			(249)	0.00	0.00	(249.00)
001100	General Fund - Tuition and Fees	0FACR	Faculty Research			(5,330)	0.00	0.00	(5,330.00)
001700	ICC Credits	0CUP06	CAS Dept Rsch Start-Up 06			30	0.00	10.00	40.00

- e. Tips for use:
 - i. It does not provide available balance – don't let the activity with () make you think it's overspent.
 - ii.








4. Report Name: Grants and Projects

- a. Location: Finance --> Grant Reports --> Grants and Projects

- b. Information provided:
 - i. Your ORG's list of all grants and projects
- c. How to run:
 - i. Select the Level 5 ORG
- d. How it looks:

Grants and Projects

Organization 631200 Rsch Institute of Neuroscience

PI	Burn Rate / Grant	Title	Start Date	End Date	Budget	Activity	Encumbrances	Balance	% Remaining
Ackerman, Sarah D.	 217700	The role of astrocyte-neuron signaling in closing a critical period required for motor circuit structure, function, and behavior	15-Apr-2021	31-Mar-2023	361,260.00	207,254.90	0.00	154,005.10	43%
	 423220	Contributions of Astrocyte Function and Dysfunction to ALS: The ALS Association Milton Safenowitz Postdoctoral Fellowship Program	1-Sep-2018	30-Nov-2020	100,000.00	106,105.00	0.00	-6,105.00	-6%
Bean, James C.	 423880	HMM OCCUPANCY CHARGE	1-Dec-1989		0.00	953,207.39	309.60	-1,088,118.87	-
Brown, Morgan A.	 214400	IND-NRSA: Transparent Graphene Electrode Arrays for Simultaneous Electrical and Optical Investigation of Computations in the Olfactory Bulb	1-Jan-2019	30-Jun-2022	239,122.00	239,122.00	0.00	0.00	-
Bruckner, Joseph J.	 214410	Microbial modulation of forebrain development and social behavior	8-Feb-2019	31-Jul-2019	29,747.00	28,791.72	0.00	955.28	3%
	 444420	Microbial Modulation of Forebrain Development and Social Behavior - LSRF Fellowship	1-Aug-2019	31-Jul-2022	186,000.00	179,144.74	0.00	6,855.26	4%
Doe, Christopher A.	 214270	IND-NRSA: In vivo Analysis of Astrocyte-neuron Dynamics in Circuit Formation, Function, and Maintenance	1-Sep-2016	28-Feb-2019	93,982.00	121,121.65	0.00	-27,139.65	-29%

Microsoft Outlook

- e. Tips for Use
 - i. Depending on how large your ORG is, it can take some time. Email it to yourself.

- Questions:
 - Any that I forgot?
 - Which ones do you use regularly?
 - What if SPS could set these (or some version of them) to go to your PIs automatically?