**Peoplesoft Grant Reports**

**PROPOSALS**

Proposal Inventory: The Proposal Inventory is a look-up tool that allows users to enter search criteria and find proposals that have been routed to Sponsored Programs. Users can search proposals by the following criteria: sponsor name, PI name, proposal status and date range. Proposal date displayed include: FAR#, version, title, sponsor, proposal type, start and end date and due date (date received in SPA). The Proposal Inventory is helpful as a quick look-up for small amounts of data.

Proposal Report: The Proposal Report offers another method to search for proposal related data and includes several additional search options. Search criteria include, Date range, PI, CO-PI, sponsor, flow-through sponsor as well as an option to search by college or departments.

**AWARDS**

Award Inventory: The Award Inventory is a look-up tool that allows users to enter search criteria and find basic data about awards NDSU has received. Users can search awards by the following criteria: sponsor name, PI name and award status. Award date displayed include: FAR#, sponsor, sponsor award number, award type, awarded amount, start and end date and due date, award status. The Award Inventory is helpful as a quick look-up for small amounts of data.

Awards Received Report: The Awards Received Report offers another method to search for award related data and includes several additional search options. Search criteria include, Date range…., PI, CO-PI, sponsor, flow-through sponsor as well as an option to search by college or departments.

PI Report: The Pl Report is one of the main reporting tools used to manage Grant & Contract Funds. This report provides useful details of the award, such as sponsor name, main award Pl, main award #, subproject# (if any), subproject Pl name (if any), project name, F&A rate, start date, end date, and fund number, department number, and project number. This report can be run using 6 different options and by different date options. The bottom portion of the Pl Report is a reflection of the approved budget by category and provides a quick snapshot of expenses for the current month, cumulative expenses, and remaining balance available.

Salary Distribution Report: The Salary Distribution Report (run using HRMS) is a helpful report to show you the detail of all of the payroll expenses on an award. It provides a breakdown, by payroll category (Regular Benefitted, Faculty, Grad Assistants, Temporary/Hourly, Fringe Benefits, etc) of each individual paid on a grant and includes the PPE date, Retro Date (if there was one), the amount, the check date, and the funding string.

Detail Transaction Report: The Detail Transaction Report is a report that is used to show posted operating expenses and it includes a short description of the expense. The expenses are grouped together by Budget Category, and within the budget category, they are then listed chronologically by account code.

Budget Transaction Detail Report: The Budget Transaction Detail Report is a report that is used to show ALL posted expenses - including all Direct Expenses (Payroll, Operating, Equipment, etc) and Indirect Expenses (F&A transactions). It provides a more limited description of the transaction as compared with the Detailed Transaction Report.

Award or Project Summary Report: The Award or Project Summary Report is a report that from a departmental aspect can be used to get a quick ‘snap-shot’ view of all of the projects in a given department, and where each award is with the amount of spending remaining along side where the award is in terms of the period of performance. A good example is that for each project, you can see “this award is 30% spent, but 75% done in terms of the time frame”, which might be an indicator the PI should review the budget to see if expected expenses have been paid. Conversely, there might be a project where 80% is spent and it’s only 20% of the way through time-wise, so that potentially could be a red-flag, too.