Instructions for Generating Grant Proposal Queries in Peoplesoft

(These instructions can be found at http://www.ndsu.edu/research/reports/)

1. Go to https://adminsys.ndus.edu/psp/hefp/?cmd=login&languageCd=ENG& (Click Allow if needed to pull up this site)

2. Click on Sign in to Peoplesoft and log in (you must have access to the Connect ND Finance module)

3. Choose Reporting Tools

4. Click on Query Viewer

5. Search by Query Name begins with NDU_GM70. Click on Search.

6. Choose ‘Lists information for Proposals’ by clicking under the column ‘Run to Excel.’ (If you get a yellow pop-up bar alert toward the top of your screen, click to enable.)

7. Under Business Unit, enter NDSU1

8. Enter your date parameters in this format: 00/00/0000

   NOTE: From Due Date is the date when Sponsored Programs Administration Office received the Proposal Transmittal Form (PTF), not the agency due date.

9. For Version ID, enter V% (important!)

10. Click ‘View Results’ – report is generated. Open with Excel.

11. One data sort is recommended. You may be prompted to click Enable Editing to do this.

   Go to the ‘Total Budget’ column, click to highlight the column, click on the SORT button on the top menu; sort smallest to biggest; and choose Expand the Selection. You may want to delete the rows for those that have a zero amount. Total Budgets with zero amounts are likely Letters of Intent or Pre-proposals.

12. To add up or total a column, such as the ‘Total Budget’ column – go to the cell just below the bottom entry of the desired column, click on ‘∑ auto sum’ on the top menu, then click Enter.

   NOTE: Co-Principal Investigators (PI’s) are not reflected in this table; only the primary PI. The ‘Description (OTH)’ column contains the F&A cost rate (indirect cost or overhead rate) used. The ‘Contract’ column contains FAR numbers, which are the NDSU ID numbers assigned to grant or contract accounts. The ‘Customer Name’ column designates the grant agency, but keep in mind that if it is a ‘flow-through’ grant, the ‘Primary Sponsor’ column will show the original granting agency.