

(Last updated 2/9/2015)

Instructions for Generating Grant Proposal Queries in Peoplesoft

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

1. Go to <https://adminsyst.ndsu.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 '**Σ 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.