



Grants Installment Status Dashboard

The Grants Installment Status dashboard provides details regarding the installment(s) for each award.

Installment refers to an allotment of funding on the award that can increase or decrease over time. A single award can have a single installment or, if necessary, multiple installments. The installment controls the amount of money that can be funded to a project and task(s). It also controls the amount of money that can be transferred in the general ledger to fund the award.

- Multiple prompt combination options are available
- Drilldown by Award for details by Project and Task

Use Grants Installment Status:

- For a “snapshot” of the total funding amount by installment on an Award
- For Start Date and End Date of each installment to identify the valid date range
- To verify if the installment is currently active
- To drilldown on the Award to see installment detail by Project and Task

Grants Funds Available | Expenditure Inquiry | Summary Reports | **Grants Installment Status** | IDC Acct Setup | IDC Awd Setup | IDC Dist Amts

Prompts

Proj # Proj Org #/Name Awd Type Install Active Flag
 Task # Task Org #/Name Awd Purpose Install Bill Flag
 Awd # Awd Org #/Name Proj Type Capital State Funding Status
 Install Num Awd Status Agency Name
 Proj Status

Prompts	Definition
Proj #	Five-digit value that represents a person or scope of work
Task	Up to five-character value, that represents the work breakdown structure for a Project
Awd #	Seven-digit value that represents the source of funding that supports one or more Projects/Tasks
Install Num	Naming convention for the installment
Proj Org#/Name	Organization number/name assigned to the project
Task Org#/Name	Organization number/name assigned to the task.
Awd Org#/Name	Organization number/name assigned to the award
Awd Status	The status of the Award (Active, At Risk, On Hold, or Closed)
Proj Status	The status of the Project (Pending, Approved, Closed)
Awd Category	The type of award (Internal, Sponsored, Cost Share or Capital)
Award Type	Award Type is the source of funding for that award and is summarized to the Source segment in the General Ledger
Awd Purpose	Award Purpose is the function for that award and is summarized to the Function segment in the General Ledger



Proj Type	The type of Project (Sponsored, Internal, or Capital)
Agency Name	The bill to agency on the Award. Example) Internal Awards are Internal Funding Source
Install Active Flag	Active Flag = Y means the installment is active Active Flag = N means the installment is not active
Install Bill Flag	Billable Flag = Y means the transfer or billing is allowed on the award Billable Flag = N means the transfer or billing is not allowed on the award
Capital State Funding Status	Finance use only

Dashboard Page Columns (on screen)

Awd #, Awd Short Name, Agency Name, Install Num, Install Desc, Install Start, Install End, Install Total, Install Active Flag, Install Bill Flag, Capital State Funding Status (Finance use only), Total Funding Amount

Additional Fields Included in Export to CSV

Awd Ref State ALI # (Finance use only), Awd Org #, Awd Purpose, Awd Type, Awd Status

NOTE: These fields may also be added to your view by right clicking on any column heading and clicking on **Include column**. Select the field from the list and it will be added to the right of the column. This can also be used to exclude a column. Right click on the heading of a column to exclude and select **Exclude column**.

In this example the Awd Org # field was selected and added to the right of the Agency Name column.

Grants Installment Status

Awd #	Awd Short Name	Agency Name	Install Num	Install Desc
4100001	A&S RSCH INCENTIVE - AWRD 1	INTERNAL FUNDE		

Refresh - Print - Export

Grants Installment Status

Awd #	Awd Short Name	Agency Name	Awd Org #	Install Num
4100001	A&S RSCH INCENTIVE - AWRD 1	INTERNAL FUNDING SOURCE	100050	00 01 02

Refresh - Print - Export



Drilldown Options

Drilling-down involves clicking on data at the summary level to reveal detailed information. In Grants Installment Status, you may drilldown by *Awd #* to see the details. To drill-down, click the desired *Awd #* **link**. The details will display.

NOTE: When you drill-down in a dashboard you may use the breadcrumbs to navigate back to the summary level. To navigate back to the summary level, click **Grants General: Grants Installment Status** in the breadcrumb trail at the bottom of the screen.

[Grants General: Grants Installment Status](#) > Grants Installment Funding Summary

Examples of Grant Installment Status

Internal Award: Enter in *Awd #* 4140003 in Prompts and hit Apply. Include column for *Awd Org #* for the following results:

Grants Installment Status												
Awd #	Awd Short Name	Agency Name	Awd Org #	Install Num	Install Desc	Install Start	Install End	Install Total	Install Active Flag	Install Bill Flag	Capital State Funding Status	Total Funding Amount
4140003	ENG STARTUP FY18	INTERNAL FUNDING SOURCE	140000	1	ENG STARTUP FY18	07/01/2017	06/30/2019	128,032.00	Y	Y		128,032.00
				2	ENG STARTUP FY18	07/01/2017	06/30/2019	242,245.00	Y	Y		242,245.00
				3	ENG STARTUP FY18	07/01/2017	06/30/2019	109,953.00	Y	Y		109,953.00
				4	ENG STARTUP FY18	07/01/2017	06/30/2019	138,663.00	Y	Y		138,663.00

[Refresh](#) - [Print](#) - [Export](#)

Clicked on 4140003 to drill down to Funding Summary to see detail by Project and Task.

Grants Installment Funding Summary

Proj #	Task #	Install Num	Total Funding Amount	Total Invoiced Amount	Total Revenue Amount
12080	20	2	204,421.00		204,421.00
12084	20	4	34,000.00		34,000.00
12192	20	3	109,953.00		109,953.00
12338	20	1	111,450.00		111,450.00
12604	20	2	37,824.00		37,824.00
14416	20	4	56,054.00		56,054.00
14418	20	1	16,582.00		16,582.00
14419	20	4	3,000.00		3,000.00
14420	20	4	20,603.00		20,603.00
14422	20	4	25,006.00		25,006.00
Grand Total			618,893.00		618,893.00

[Return](#) - [Refresh](#) - [Print](#) - [Export](#) - [Create Bookmark Link](#)



Sponsored and Cost Share Awards: Enter Proj # 11179 (this project is funded by sponsored and cost share awards) in Prompts and hit Apply for the following results:

Grants Installment Status											
Awd #	Awd Short Name	Agency Name	Install Num	Install Desc	Install Start	Install End	Install Total	Install Active Flag	Install Bill Flag	Capital State Funding Status	Total Funding Amount
1120681	CAP-COLLEGE ADJUST PRGM	U S DEPARTMENT OF EDUCATION	00	Initial Installment Created for Legacy Project GL011297C	09/01/2015	08/31/2020	972,446.00	Y	Y		972,446.00
3191601	UC - SPON INSTRUC COST SHARE	COST SHARE	00	Conversion to Grants from Projects	09/01/2015	08/31/2020	98,151.71	Y	Y		98,151.71

[Refresh](#) - [Print](#) - [Export](#)

Click on 1120681 to drill down to Funding Summary on Sponsored Award.

Grants Installment Funding Summary

Proj #	Task #	Install Num	Total Funding Amount	Total Invoiced Amount	Total Revenue Amount
11179	10.01	00	883,446.00	674,358.58	674,358.58
	10.02	00	89,000.00	89,000.00	89,000.00
Grand Total			972,446.00	763,358.58	763,358.58

[Return](#) - [Refresh](#) - [Print](#) - [Export](#) - [Create Bookmark Link](#)

Clicked on 3191601 to drill down to Funding Summary on Cost Share Award.

Grants Installment Funding Summary

Proj #	Task #	Install Num	Total Funding Amount	Total Invoiced Amount	Total Revenue Amount
11179	10.01	00	53,151.71		53,151.71
	10.02	00	45,000.00		15,000.00
Grand Total			98,151.71		68,151.71

[Return](#) - [Refresh](#) - [Print](#) - [Export](#) - [Create Bookmark Link](#)