



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



<b>Proj Type</b>	The type of Project (Sponsored, Internal, or Capital)
<b>Agency Name</b>	The bill to agency on the Award. Example) Internal Awards are Internal Funding Source
<b>Install Active Flag</b>	Active Flag = Y means the installment is active Active Flag = N means the installment is not active
<b>Install Bill Flag</b>	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
<b>Capital State Funding Status</b>	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 FUNE		

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**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

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## 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

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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
<b>Grand Total</b>			<b>618,893.00</b>		<b>618,893.00</b>

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**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

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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
<b>Grand Total</b>			<b>972,446.00</b>	<b>763,358.58</b>	<b>763,358.58</b>

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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
<b>Grand Total</b>			<b>98,151.71</b>		<b>68,151.71</b>

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