Grants Funds Available Dashboard Page

The Grants Funds Available dashboard page details the totals by Project, Task and Award (PTA) combination with drilldowns to Project and Award summaries with additional drilldowns to transaction detail.

- Period is a required prompt
- Multiple prompt combination options are available
- Drilldown by Project, Task or Award for more details

Use Grants Funds Available:

- For a “snapshot” of funds available by PTA for the individual/department
- For PTA Start Date and PTA End Date to identify the valid expenditure item dates for that PTA
- To see if the PTA is currently able to be charged
- To drilldown to Project, Task, or Award detail by Expenditure Category
- To drilldown to expense transactions

<table>
<thead>
<tr>
<th>Prompts</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Period</td>
<td>*(Asterisk) indicates this is a required field. The accounting period.</td>
</tr>
<tr>
<td>Project Number</td>
<td>Five-digit value that represents a person or scope of work.</td>
</tr>
<tr>
<td>Project Status</td>
<td>The status of the Project (Pending, Approved, Closed).</td>
</tr>
<tr>
<td>Project Type</td>
<td>The type of Project (Sponsored, Internal, or Capital).</td>
</tr>
<tr>
<td>Project Organization</td>
<td>Identifies who administers the Project funds.</td>
</tr>
<tr>
<td>Task Number</td>
<td>Up to five-character value, that represents the work breakdown structure for a Project.</td>
</tr>
<tr>
<td>Task Organization</td>
<td>Task Organization is used to summarize accounting information to the Organization segment in the General Ledger.</td>
</tr>
<tr>
<td>Task ORG Parent Level</td>
<td>The parent level of Task Organization in the GL org hierarchy (A,B,C,D,E,F).</td>
</tr>
</tbody>
</table>
Prompts | Definition
--- | ---
Task ORG Parent #/Desc | The parent number and description of the Task Organization. Example: C10000 = Arts & Sciences
Award Number | Seven-digit value that represents the source of funding that supports one or more Projects/Tasks.
Award Status | The status of the Award (Active, At Risk, On Hold, or Closed).
Award Type | Award Type is the source of funding for that award and is summarized to the Source segment in the General Ledger.
Award Organization | Identifies who administers the Award funds.
Award/Project Member | Person assigned to any role for the Project or Award.
Award Category | Displays PTAs with the specified award category (Sponsored, Cost Share, Capital, or Internal).
Restrict to Overspent PTAs? | Allows you to see only overspent PTAs. Select Y to limit the results to only overspent PTAs.
Include Closed Awards? | Allows you to choose only open or both open and closed Awards. Select Y to include both open and closed Awards in the results.
Include Closed Projects? | Allows you to see open or closed Projects. Select Y to include both open and closed Projects in the results.
PTA with end date before | Allows you to see all PTAs ending within a specific time frame.

Dashboard Results

<table>
<thead>
<tr>
<th>Proj #</th>
<th>Proj Short Name</th>
<th>Task #</th>
<th>Task Name</th>
<th>Awd #</th>
<th>Awd Short Name</th>
<th>Agency Name</th>
<th>Task Org #/Name</th>
<th>PTA Start</th>
<th>PTA End</th>
<th>PTA Chargeable</th>
<th>Funding Amt</th>
<th>Budget ITD</th>
<th>Expense ITD</th>
<th>Commitment Amt</th>
<th>Avail Balance ITD</th>
<th>Fin % Cmplt ITD</th>
<th>Revenue ITD</th>
<th>Revenue FYTD</th>
<th>Expense FYTD</th>
<th>Expense PTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>11155</td>
<td>INTEGRATED BLYNDR</td>
<td>10</td>
<td>PROJECT COSTS</td>
<td>1131660</td>
<td>INTEGRATED BLYNDR</td>
<td>U.S. DEPARTMENT OF JUSTICE</td>
<td>1063799</td>
<td>1/11/2019</td>
<td>1/11/2019</td>
<td>Y</td>
<td>150,000.00</td>
<td>150,000.00</td>
<td>129,400.29</td>
<td>26,584.00</td>
<td>2,525.60</td>
<td>90%</td>
<td>128,400.29</td>
<td>2,483.54</td>
<td>2,483.54</td>
<td>0.00</td>
</tr>
<tr>
<td>11166</td>
<td>ALCOHOL INTOXICATION RISK</td>
<td>10</td>
<td>PROJECT COSTS</td>
<td>1131661</td>
<td>ALCOHOL INTOXICATION RISK</td>
<td>NATIONAL INSTITUTES OF HEALTH</td>
<td>1063799</td>
<td>10/20/2017</td>
<td>10/20/2017</td>
<td>Y</td>
<td>300,000.00</td>
<td>300,000.00</td>
<td>282,147.88</td>
<td>1,010.18</td>
<td>151,104.96</td>
<td>60%</td>
<td>254,797.35</td>
<td>23,136.35</td>
<td>33,590.95</td>
<td>7,300.00</td>
</tr>
<tr>
<td>11168</td>
<td>REU SITE TREATMENT-RELATED</td>
<td>18.81</td>
<td>PROJECT COSTS</td>
<td>1132268</td>
<td>REU SITE TREATMENT-RELATED</td>
<td>NATIONAL SCIENCE FOUNDATION</td>
<td>1063799</td>
<td>5/19/2017</td>
<td>5/19/2017</td>
<td>Y</td>
<td>101,540.00</td>
<td>101,540.00</td>
<td>61,722.00</td>
<td>0.00</td>
<td>39,317.32</td>
<td>61%</td>
<td>61,722.00</td>
<td>4,087.74</td>
<td>4,087.74</td>
<td>17.74</td>
</tr>
<tr>
<td>11169</td>
<td>REU SITE TREATMENT-RELATED</td>
<td>18.82</td>
<td>FY17 PARTICIPANT</td>
<td>1132269</td>
<td>REU SITE TREATMENT-RELATED</td>
<td>NATIONAL SCIENCE FOUNDATION</td>
<td>1063799</td>
<td>8/31/2017</td>
<td>8/31/2017</td>
<td>Y</td>
<td>199,400.00</td>
<td>199,400.00</td>
<td>109,473.24</td>
<td>0.00</td>
<td>82,046.76</td>
<td>51%</td>
<td>90,386.94</td>
<td>30,123.53</td>
<td>43,195.93</td>
<td>13,074.60</td>
</tr>
</tbody>
</table>

Additional Fields Available

Any of the fields listed below can be included in the dashboard results. Additionally, these fields are included if you export your dashboard results in the CSV (comma separated variable) format:

- Period, FY, CIP Master Record # DFF, Proj Status, Proj Start, Proj End, Cap Cat/Sub Cat, Awd Ref State ALI #, Awd Type, Awd Purpose, Awd Status, Pre Awd Date, Awd Start, Awd End, Awd Orig #/Name, Awd Cat DFF Descr, Foundation Source, Foundation Source Descr, Task Serv Type, Task Chg Flag, Task Start, Task End, Awd Member, Awd Role, Entity, Source, Organization, Activity, Function
Drilldown Options

From the initial dashboard that displays totals by PTA, links are available (shown in blue) to drilldown to totals broken down by expenditure category. Your drilldown options include:

- Project # (Proj #) to see the breakout for all tasks and awards on the project.
- Task # to see all awards funding the task.
- Award # (Awd #) displays two options: All combinations for award — shows all Projects/tasks funded by the award; or PTA Combination Drill shows only the detail for the specific PTA row.

Drill to Expenditure Category

From the Expenditure Category summary, you have the option to drilldown to transaction detail by clicking on the blue links:

- Project — to display all the transactions for the project
- Task — to display all transactions for the task
- Award — to display all the transactions for the award
- Exp Category — to display the transactions for the selected expenditure category. A second option will be displayed allowing to select:
  - Expenditure Category — all transactions from inception to date
  - Expenditure Category by Period — just transactions for the selected period on the screen (in this example — SEP 2019-20)
  - Expenditure Category by Year - just transactions for the fiscal year of the selected period on the screen (in this example — SEP 2019-20 would display FY20)
Drill to View Transactions

From the transaction screen, you may drill down to additional transaction details.

1. If the Trans ID is shown in blue text, you may be able to drill down to PEDS data for PAYEXP transactions (for users with PEDS access) or Student Accounting data for PEOPLESOFT transactions (for users with Bursar dashboard access).
2. The Exp Batch (shown in blue) will allow you to view the complete Journal Entry.

Payroll Expenditure Details (PEDS)

Student Accounting Data (Peoplesoft)

Basic OBI Functionality

For information about basic OBI functionality, please refer to OBI Dashboard Functionality quick reference guide: https://www.ohio.edu/sites/default/files/sites/finance/systems/files/obi/OBI_Functionality_WEB.pdf

This guide includes details about saving customizations, exporting data, and breadcrumb navigation.