



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 transaction

Prompts	Definition
<b>*Period</b>	* (Asterisk) indicates this is a required field.
<b>Project Number</b>	Five-digit value that represents a person or scope of work.
<b>Task Number</b>	Up to five-character value, that represents the work breakdown structure for a Project.
<b>Award Number</b>	Seven-digit value that represents the source of funding that supports one or more Projects/Tasks.
<b>Exp Category</b>	Combination of Object Code and Name. Example: 712410 LABORATORY SUPPLIES
<b>Project Status</b>	The status of the Project (Pending, Approved, Closed)
<b>Award Status</b>	The status of the Award (Active, At Risk, On Hold, or Closed)
<b>Project Type</b>	The type of Project (Sponsored, Internal, 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>Task Organization</b>	Task Organization is used to summarize accounting information to the Organization segment in the General Ledger.
<b>Award/Project Member</b>	Person assigned to any role for the Project.



## Dashboard Page Columns (on screen)

Proj #, Proj Short Name, Task #, Task Name, Awd #, Awd Short Name, Agency Name, Task Org #/Name, PTA Start, PTA End, PTA Chargeable, Funding Amt, Budget ITD, Expense ITD, Commitment Amt, Avail Balance, Fin % Cmpld ITD, Revenue ITD

## Additional Fields Included in Export to CSV

Period, FY, CIP Master Record # DFF, Awd Cat - Awd Sub Cat, Awd Ref State ALI #, Awd Member, Awd Role

## Drilldown Options


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

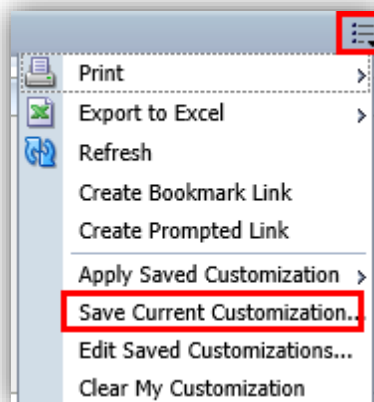
**NOTE:** When you drill-down in a dashboard, you do not have to re-run the analysis like you do for reports. You may use the breadcrumbs to navigate back to the summary level. To navigate back to the summary level, click **Grants General: Grants Funds Available** in the breadcrumb trail at the bottom of the screen.

[Grants General: Grants Funds Available](#) > [Funds Available by Expenditure Category](#)

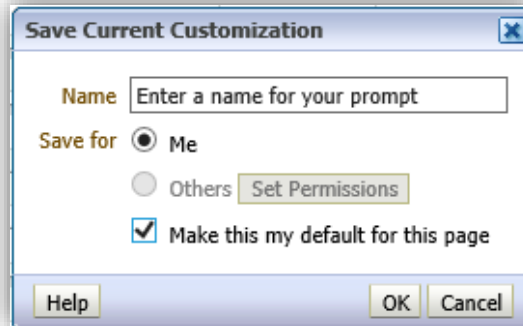
## Save A Custom Prompt

Prompts allow you to query specific data in order to narrow your data results. If you query the same data regularly, you can save your custom prompt for future use. If you choose to save your custom prompt, please note that it is associated with the dashboard page that is currently selected.

1. Login to OBI and navigate to the **Grants General** Dashboard.
2. On the **Grants Funds Available** dashboard page, *\*Period* is a required field! Additionally, prompt by *Award/Project Member* and click **Apply**.
3. After you specify your **Prompts** and click **Apply**, you may save your custom prompt for future use.
4. To save your custom prompt, click **Page Options** .
5. Click **Save Current Customization**.



6. Enter a **Name** for your custom prompt. If you want your customized prompt to be the default for the current dashboard page, click the *optional checkbox* next to *Make this my default for this page*.



If you click this checkbox, each time you access the **Grants Funds Available** dashboard page, your saved customization will automatically display.

7. Click **OK**.

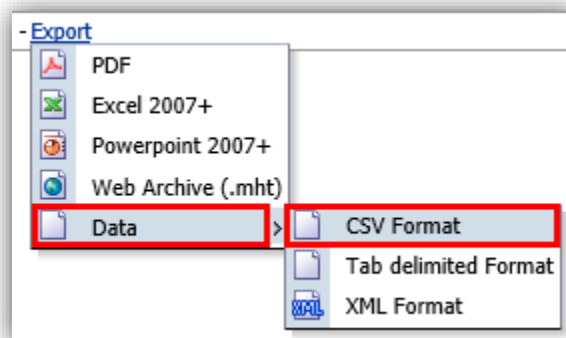
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**WARNING: WHEN YOU SAVE THE CURRENT CUSTOMIZATION, THE \*PERIOD WILL SAVE AS WELL, AND WILL NEED TO BE CHANGED.**

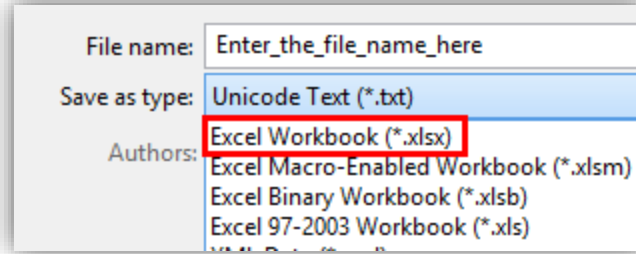
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## Export to CSV

1. You may view the data directly within OBI, or you may export the data for further manipulation, formatting, and analysis. To export the data, click **Export**.
2. If you export to CSV, the cell/text format shown in OBI will not be exported to your file. The file will contain the raw data only. For example, cells will not be shaded and merged cells will be unmerged with values shown in each row. As a result, you can format the data as desired. To export the data to CSV Format, click **Export**, trace to **Data**, and click **CSV Format**. Upon confirmation, click **Open** to open the CSV file.



3. If you export data to CSV, spend time formatting the data, and wish to save your work, you must re-save the CSV file to Microsoft Excel to retain formatting. To retain formatting, from the **File** menu, click **Save As**. **Specify where you would like to save the file** and enter a **File name** that you will recognize. Under *Save as type*, click **Excel Workbook (\*.xlsx)**.



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**WARNING: BY DEFAULT, A CSV FILE IS SAVED AS TEXT ONLY. AS A RESULT, TO SAVE YOUR FORMATTING, YOU MUST RE-SAVE THE CSV FILE WITH A MICROSOFT EXCEL EXTENSION (.XLS\*).**

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