



Summary Reports Dashboard Page

The Summary Reports dashboard page details totals by Period PTD, Fiscal Year FYTD and Inception ITD. You may drilldown to formatted Project and Award reports.

- Period is a required prompt
- Multiple prompt combination options are available

Use Summary Reports:

- To drilldown by Project or Award to report formatted results

The screenshot shows a web interface with a navigation bar containing 'Grants Funds Available', 'Expenditure Inquiry', and 'Summary Reports'. Below this is a 'Prompts' section with the following fields:

- *Period:
- Project Number:
- Task Number:
- Award Number:
- Task Organization:
- Award Type:
- Task ORG Parent Level:
- Agency Contract:
- Task ORG Parent #/Desc:
- Award/Project Member:

Buttons for 'Apply' and 'Reset' are located at the bottom right of the prompts section.

Prompts	Definition
*Period	* (Asterisk) indicates this is a required field.
Project Number	Five-digit value that represents a person or scope of work.
Task Number	Up to five-character value, that represents the work breakdown structure for a Project.
Task Organization	Task Organization is used to summarize accounting information to the Organization segment in the General Ledger.
Task ORG Parent Level	The parent level of the Task Organization (A, B, C, D, E, or F)
Task ORG Parent #/Desc	The parent number and description of the Task Organization. Example: C10000 ARTS AND SCIENCES
Award Number	Seven-digit value that represents the source of funding that supports one or more Projects/Tasks.
Award Type	Represents the source of funding for the Award.
Agency Contract	The Agency Contract Number. For Sponsored Awards it is the number assigned by the agency.
Award/Project Member	Person assigned to any role for the Project.

Dashboard Page Columns (on screen)

Proj #, Proj Short Name, Task #, Task Name, Awd #, Awd Full Name, Revenue ITD, Budget ITD, Expense ITD, Avail Balance, Revenue FYTD, Expense FYTD, Revenue PTD, Expense PTD, Current Commitment

Additional Fields Included in Export to CSV

No additional fields are included.



Drilldown Options

Drilling-down involves clicking on data at the summary level to reveal detailed information. In Summary Reports, you may drilldown by *Proj # or Awd #* 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: Summary Reports** in the breadcrumb trail at the bottom of the screen.

[Grants General: Summary Reports](#) > [Project Detail Report](#)