



**Description**

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.

Use Summary Reports to:

- Drill by Project or Award to report formatted results

The screenshot shows a web interface with a navigation bar at the top containing 'Lookups', 'General Ledger', 'Grants', 'Purchasing', and 'Equipment Inventory'. Below this is a sub-navigation bar with 'Grants Funds Available', 'Expenditure Inquiry', 'Summary Reports', 'Grants Installment Status', 'IDC Account Setup', 'IDC Award Setup', and 'IDC Distribution Amounts'. The main area is titled 'Prompts' and contains several search criteria:
 

- \*Period: A dropdown menu currently showing 'APR 2020-20'.
- Project Number: A text input field.
- Task Number: A text input field.
- Task Organization: A dropdown menu with '--Select Value--'.
- Task ORG Parent Level: A dropdown menu with '--Select Value--'.
- Task ORG Parent #/Desc: A dropdown menu with '--Select Value--'.
- Award Number: A text input field.
- Award Type: A dropdown menu with '--Select Value--'.
- Agency Contract: A dropdown menu with '--Select Value--'.
- Award/Project Member: A dropdown menu with '--Select Value--'.
- Award Category: A dropdown menu with '--Select Value--'.

 At the bottom right of the prompts area are 'Apply' and 'Reset' buttons. A message at the bottom of the form reads: 'Please select one of the search criteria to see results.'

Prompts	Definition
<b>*Period</b>	* (Asterisk) indicates this is a required field. The accounting period.
<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>Task Organization</b>	Task Organization is used to summarize accounting information to the Organization segment in the General Ledger.
<b>Task ORG Parent Level</b>	The parent level of the Task Organization (A, B, C, D, E, or F)
<b>Task ORG Parent #/Desc</b>	The parent number and description of the Task Organization. Example: C10000 ARTS AND SCIENCES.
<b>Award Number</b>	Seven-digit value that represents the source of funding that supports one or more Projects/Tasks.
<b>Award Type</b>	Represents the source of funding for the Award.
<b>Agency Contract</b>	The Agency Contract Number. For Sponsored Awards it is the number assigned by the agency.
<b>Award/Project Member</b>	Person assigned to any role for the Project or Award.
<b>Award Category</b>	Allows the user to only see sources used with certain types of Grants awards: Capital/Cost Share/Internal Award/Sponsored/Unrestricted.

## Grants: Summary Reports

### 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 **Finance: Summary Reports** in the breadcrumb trail at the bottom of the screen.

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