Web Grants Management – Summary of Enhancements and Additions
Nov. 2008

The Web Grants Management system tools have been updated. Certain existing applications have been enhanced and some new applications have been created. The Web Grants Management menu reflects the following changes and new applications based on security roles:

1. The Project Expense and Budget Report has been improved with a new search menu, a new results page, and other minor updates.

2. The Budget Revision application is now restricted to only those individuals who are authorized to complete Budget Revisions. If your position requires this capability and you no longer see the Budget Revision application, please contact your manager to submit a request to Grants and Contracts Accounting.

3. The Project Status Report has been updated with new hyperlinks for the Project ID and Award/Fund directly to the Project Expense and Budget Report.

4. **NEW** Sponsored Transaction Report – Reports direct expenditures for the projects assigned to the selected PI.


6. **NEW** PI Sponsored Project Review menu options
   - “PI Sponsored Project Review” (For Principal Investigators only)
   - “PI Sponsored Project Review – View Only”

If you have any questions or comments about this site, please email ask@business.gatech.edu
1. Project Expense and Budget (PEB) Report

The Project Expense and Budget Report (PEB) has been improved to provide additional search criteria and summary information.

>> PEB Search page updates:

The PEB search criterion has been enhanced to provide the following additional search criteria: 1) You may specify the project status, 2) You may specify the project type, or 3) You may search by College, Department, or Prime PI of a Project.

Previous references to GM Fund have been replaced with Award/Fund.
1. Project Expense and Budget (PEB) Report - Continued

- Fiscal Year defaults to current Fiscal Year – May be changed
- Period defaults to current Accounting Period – May be changed
- Setid (refers to Business Unit in PeopleSoft Financials) – Should not be changed
- Project Status defaults to All Projects – User may specify “Active” or “Inactive”
- Sponsored/Cost Share defaults to All Projects – User may instead specify “Sponsored Only” or “Cost Share Only”

![Image of filter options]

- Additionally, users may now filter the results by providing a College, Department, or both.

![Image of college and department selection]

- **OR** specify one of the following: Award/Fund Code, GL Fund Code, or Project ID.

![Image of award/fund code and gl fund code entries]

- **OR** select a Project Director name to display only projects for a particular Prime PI.

![Image of project director selection]
1. Project Expense and Budget (PEB) Report - Continued

>> PEB Results page updates:

After you enter your search criteria and hit submit, your results will be displayed:

The results page contains some new financial information immediately. You will see the “Life To Date” financial information on the right side of the page.

From this page, you should either select the link for a Complete Report (Cmpl) or Summary Report (Sumry).

<table>
<thead>
<tr>
<th>Project Expense and Budget Report</th>
<th>Date/Time: 10/29/2008 08:40:24 AM Database: Test User ID: JOCHRAINE</th>
</tr>
</thead>
<tbody>
<tr>
<td>GEOGRAPHY Institute of TECHNOLOGY</td>
<td>Project Expense and Budget Report</td>
</tr>
<tr>
<td>Project Summary Report</td>
<td>Project ID Like 21066S1</td>
</tr>
<tr>
<td>Set: GT</td>
<td>FY 2009 / Period 3</td>
</tr>
<tr>
<td>Project Status: All Projects</td>
<td>Sponsored/CostShare: All Projects</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Project ID</th>
<th>Award</th>
<th>PJ St</th>
<th>Project Expire Date</th>
<th>Type</th>
<th>Sponsor Name</th>
<th>PI Name</th>
<th>Project Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>21066S1</td>
<td>R6905</td>
<td>A</td>
<td>09/30/11</td>
<td>SPED</td>
<td>SOUTHWEST RESEARCH</td>
<td>Tilmans</td>
<td>LABORATORY MEASUREMENTS OF THE MICROWAVE OPAQUITY OF AMMONIA AND WATER VAPOR</td>
</tr>
</tbody>
</table>

(Cmpl) = Complete, Sumry = Summary
PJ St = Project Status: A = Active, I = Inactive
Type: SPED = Sponsored Project, CSHR = Cost Share Project

Grants Menu    Return to PEB Search Criteria    Logout

If you have any questions or comments about this site, please email ocgask@business.gatech.edu

• **Example:** “Sumry” selected for Project 21066S1
1. Project Expense and Budget (PEB) Report - Continued

- The Project Expense and Budget Report is now displayed......

Changes to this summary page include:

a. The Contract Cost Type has been added to the demographics section.
b. The Pre-encumbrance line has been removed from each Sponsored Category section.

2. Budget Revision to Sponsored Project

The Budget Revision application is now restricted to only those individuals who are authorized to complete Budget Revisions. If your position requires this capability and you no longer see the Budget Revision application, please contact your manager to submit a request to Grants and Contracts Accounting. Certain unused fields have also been removed from the Budget Revision page(s).
3. Project Status Report

Hyperlinks on the Project ID and Award/Fund have been added to the Project Status Report results page that will direct you to the corresponding Project Expense and Budget Report.

4. Sponsored Transaction Report

The Sponsored Transaction Report allows users to choose a PI and specify a date range to return the direct expenditures for the projects assigned to the selected PI.
4. Sponsored Transaction Report - Continued

- **Example**: Simply enter a date range and choose a Prime PI and press the submit button.

Sponsored Transaction Report Search Criteria

- **From Date**: 07/01/2007 (mm/dd/yyyy)
- **To Date**: 06/30/2008 (mm/dd/yyyy)
- **Prime PI**: Tillman, Kara L

- A report of the direct expenditures during the specified date range for the chosen Prime PI's projects will be generated......

Sponsored Transaction Report Details

**GEORGIA Institute of TECHNOLOGY**

**Sponsored Transaction Report**

**Actual Expenditures**
07/01/2007 to 06/30/2008
Prime PI: 518889 - Tillman, Kara L

Download transaction to Excel

<table>
<thead>
<tr>
<th>Project Id</th>
<th>Award#</th>
<th>Transaction Date</th>
<th>Account</th>
<th>Account Description</th>
<th>Sponsored Category</th>
<th>Transaction Description</th>
<th>Campus Ref</th>
<th>Employee Name</th>
<th>Pay End Date</th>
<th>Expense</th>
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<tbody>
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<td>P01283</td>
<td>02/28/2008</td>
<td>511100</td>
<td>Salaries-Reg Faculty w/Benefit</td>
<td>Salaries and Wages</td>
<td>SPD Redistributions</td>
<td>02/29/2008</td>
<td>$3,590</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006W2839</td>
<td>P01283</td>
<td>02/28/2008</td>
<td>511100</td>
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<td>Salaries and Wages</td>
<td>SPD Redistributions</td>
<td>01/31/2008</td>
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<td>2006W2839</td>
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<td>Salaries and Wages</td>
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<td>11/30/2007</td>
<td>$950</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note**: “Employee Name” and “Pay End Date” are detailed in this report. You may also choose to download this information to MS Excel using the link on the report.
5. SPD Project Detail – Past Pay Period Applied

The SPD Project Detail – Past Pay Period Applied report has been added to the Web Grants Management report. This report is the same as the SPD Project Detail – Past Pay Period Applied in PeopleSoft and should only be different in format. The report provides Salary Planning & Distribution information for a project for a specified year. It includes the total amount of Personal Services, Fringe Benefits & Tuition Remission by month for each individual employee associated with the specified project and fiscal year. This report reflects the amounts in the accounting periods of which the services were performed.

- Example: Simply specify a fiscal year and a project and press the submit button.
5. SPD Project Detail – Past Pay Period Applied - Continued

- The SPD Project Detail Report for the specified project and fiscal year will be displayed...

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<th>Position: 00000746</th>
<th>Job Title: Graduate Research Assistant</th>
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<td>1,066.25</td>
<td>1,066.25</td>
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<tr>
<td>Fringe</td>
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</tr>
<tr>
<td>Tuition</td>
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</tbody>
</table>

<table>
<thead>
<tr>
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<th>Employee ID</th>
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<th>Job Title: Graduate Research Assistant</th>
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<td>1,066.25</td>
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<tr>
<td>Fringe</td>
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<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Tuition</td>
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<table>
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</tr>
<tr>
<td>Tuition</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

6. PI Sponsored Project Review Menu Options

"PI Sponsored Project Review" – For Project Investigators. This tool will allow a PI to review direct expenditures for each month. The PI will also have the ability to record their review.

"PI Sponsored Project Review – View Only” – For authorized departmental finance officers. This tool provides View Only access to the PI Sponsored Project Review application.

Note: A separate “Summary Description and Navigation” document and on-line training presentation is available for the PI Sponsored Project Review application. Questions regarding PI Sponsored Project Review should be directed to pireview@business.gatech.edu.

Resources, Training, Contacts

If you have any questions regarding the Web Grants Management system, please send an email to gc.ask@business.gatech.edu. For a listing of available Grants Management Training sessions and links to Grants Management system manuals, please refer to the Grants and Contracts Accounting web-site at www.grants.gatech.edu.