



**Business Process Document**  
**PS FIN Grants Suite Inquiries and Reports: Award**  
**Activity- Summary**

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<b>Department</b>	
<b>Responsibility/Role</b>	
<b>File Name</b>	Award Activity- Summary_BUSPROC.doc
<b>Version</b>	
<b>Document Generation Date</b>	8/12/2009
<b>Date Modified</b>	8/12/2009
<b>Last Changed by</b>	
<b>Status</b>	

### Award Activity- Summary

Trigger:

<b>Required Field(s)</b>	<b>Comments</b>

<b>Output - Results</b>	<b>Comments</b>

### Additional Information

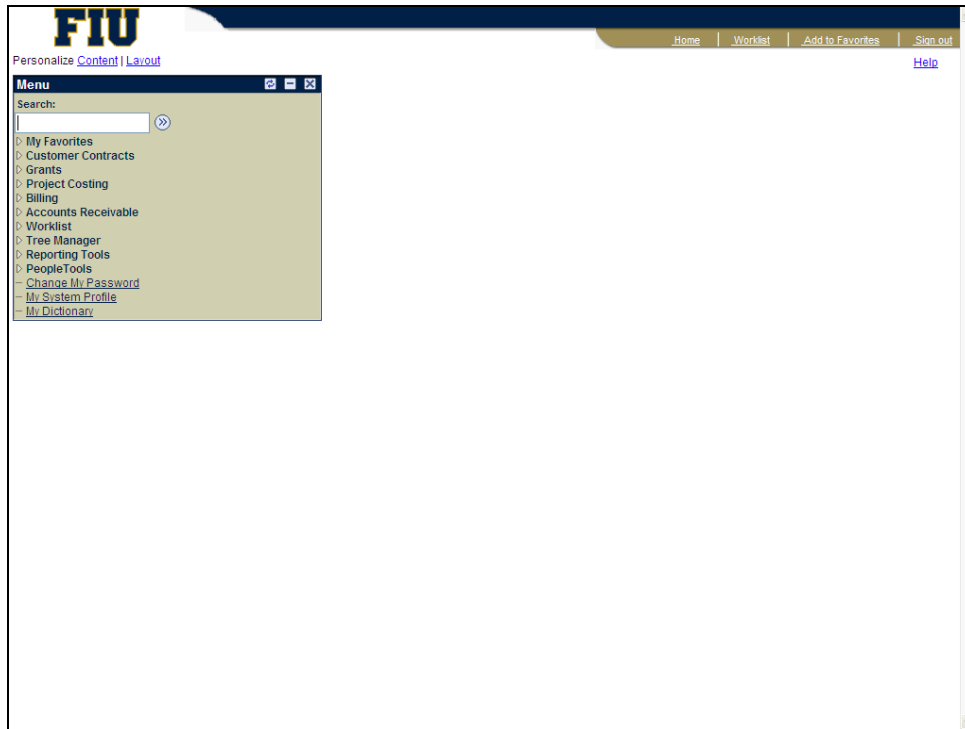
# Business Process Document


## PS FIN Grants Suite Inquiries and Reports: Award Activity- Summary



### Procedure

Run the **Award Activity Summary** report to review Award Financial activity at the budget summary level by Award #, Organizational Department, Sponsor, and PI.

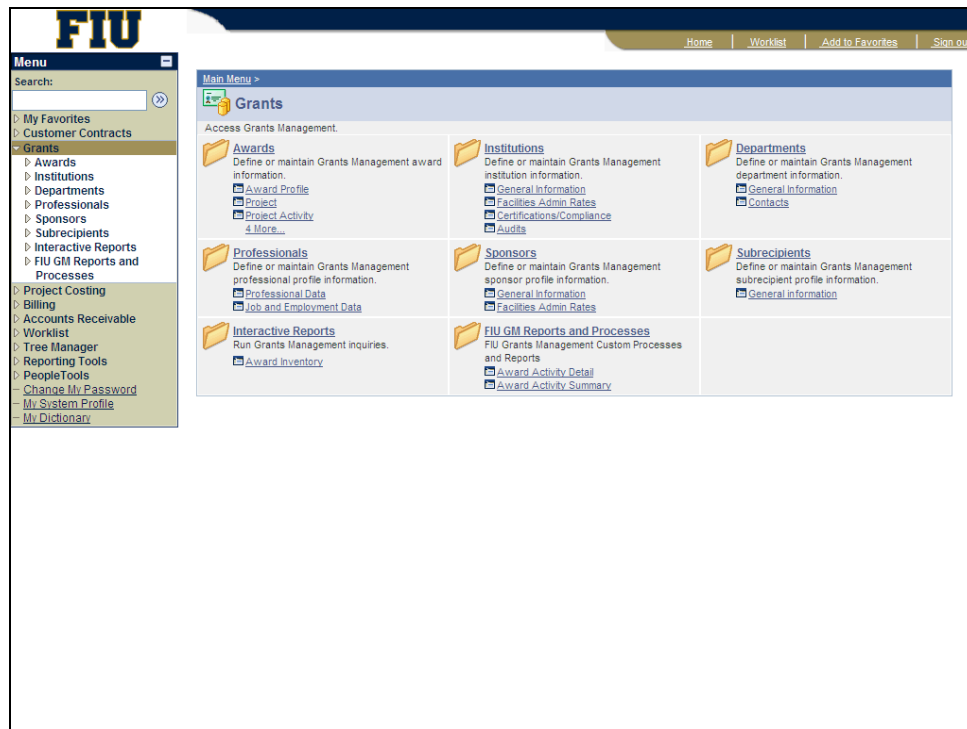




Step	Action
1.	Click the <b>Grants</b> link. 



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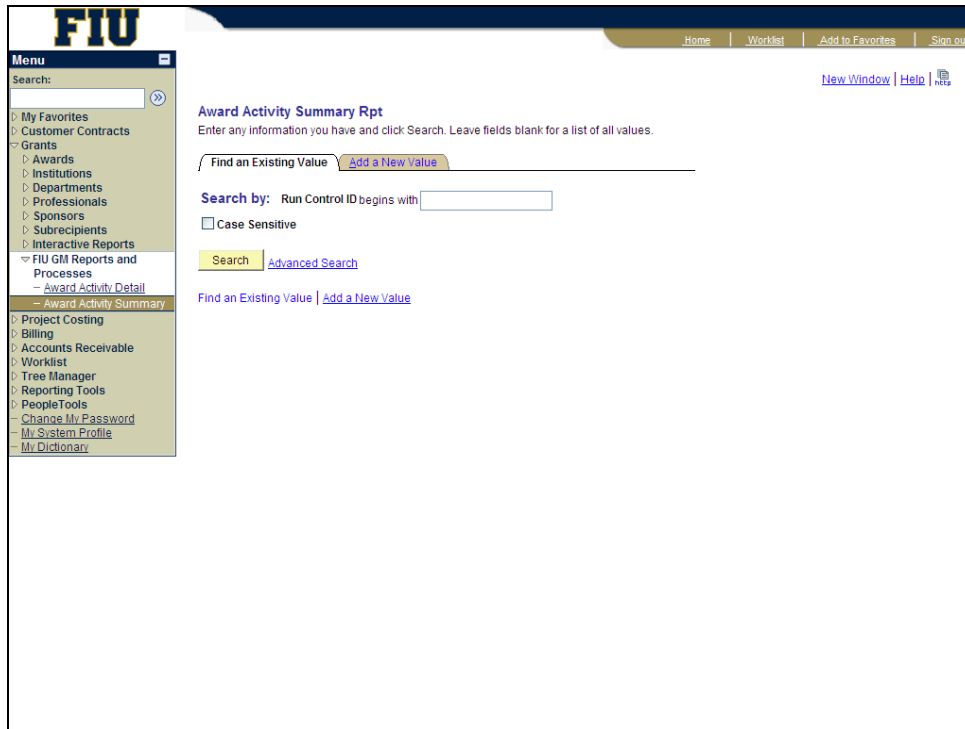
## PS FIN Grants Suite Inquiries and Reports: Award Activity- Summary



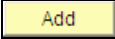


Step	Action
2.	Click the <b>FIU GM Reports and Processes</b> link. 
3.	Click the <b>Award Activity Summary</b> link. 
4.	<b>Note:</b> If this is the first time you are running the Award Activity Summary Report, click on the "Add a New Value" tab. If you have previously created a Run Control stay on the "Find an Existing Value" tab and type in the name of your Run Control ID from the previous time

# Business Process Document

## PS FIN Grants Suite Inquiries and Reports: Award Activity- Summary



Step	Action
5.	Click the <b>Add a New Value</b> tab. 
6.	Click in the <b>Run Control ID</b> field. 
7.	Enter a Run Control name into the <b>Run Control ID</b> field. For example, enter <b>"AWARD_ACTIVITY_SUMMARY"</b> .
8.	<b>Note:</b> The Run Control name cannot have any spaces, the "_" is used instead.
9.	Click the <b>Add</b> button. 



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
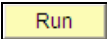
## PS FIN Grants Suite Inquiries and Reports: Award Activity- Summary


Step	Action
10.	Click in the <b>Business Unit</b> field. <input type="text"/>
11.	Enter the desired information into the <b>Business Unit</b> field. Enter " <b>FSR01</b> ".
12.	<b>Note:</b> The Award Activity Summary Report can be run using one of several search criteria including: <ul style="list-style-type: none"> <li>- Award ID</li> <li>- Department ID</li> <li>- Contract Admin</li> <li>- PI ID</li> <li>- Sponsor ID</li> <li>- As of Date</li> </ul>
13.	Click in the <b>Award ID</b> field to run the Award Summary Report by Award ID. <input type="text"/>
14.	Enter the desired information into the <b>Award ID</b> field. For example, enter " <b>AWD000000003034</b> ".
15.	<b>Note:</b> Today's date will be displayed in the <b>As of Date</b> field. Click on this field and change the date if you wish to run this report for a date that is prior to today's date.
16.	Click in the <b>As Of Date</b> field. <input type="text"/>

# Business Process Document

## PS FIN Grants Suite Inquiries and Reports: Award Activity- Summary



Step	Action
17.	Enter the desired information into the <b>As Of Date</b> field. For example, enter " <b>06122009</b> ".
18.	Click the <b>Save</b> button. 
19.	Click the <b>Run</b> button. 

Step	Action
20.	Click the <b>Server Name</b> list. 



# Business Process Document

## PS FIN Grants Suite Inquiries and Reports: Award Activity- Summary

**FIU**

Home | Worklist | Add to Favorites | Sign out

Search:  [New Window](#) | [Help](#) | [Customize Page](#) |

### Process Scheduler Request

User ID: TEST\_GM\_INQUIRY      Run Control ID: AM\_AWARD\_ACTIVITY

Server Name:       Run Date: 06/12/2009

Recurrence: PSCDB      Run Time: 11:42:28AM     

Time Zone: PSNT

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Award Activity Summary Report	FIGRR006	SQR Report	Web	PDF	<a href="#">Distribution</a>

Step	Action
21.	Click the <b>PSUNX</b> list item. <input type="text" value="PSUNX"/>
22.	<b>Note:</b> Verify the Award Activity Detail Report checkbox is checked.

# Business Process Document

## PS FIN Grants Suite Inquiries and Reports: Award Activity- Summary



**FIU** Home | Worklist | Add to Favorites | Sign out

Search:  [New Window](#) | [Help](#) | [Customize Page](#) |

**Process Scheduler Request**

User ID: TEST\_GM\_INQUIRY Run Control ID: AM\_AWARD\_ACTIVITY

Server Name:  Run Date:

Recurrence:  Run Time:

Time Zone:

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Award Activity Summary Report	FIGRR006	SQR Report	Web	PDF	<a href="#">Distribution</a>

Step	Action
23.	Click the <b>OK</b> button. <input type="button" value="OK"/>



# Business Process Document

## PS FIN Grants Suite Inquiries and Reports: Award Activity- Summary

**FIU** Home | Worklist | Add to Favorites | Sign out

Search:  [New Window](#) | [Help](#) | [Customize Page](#) |

### Award Activity Summary Report

Run Control ID: AM\_AWARD\_ACTIVITY [Report Manager](#) [Process Monitor](#)

Process Instance: 2247865

**Report Request Parameters**

\*Business Unit:

Award ID:

Department:

Contract Admin:

PI ID:

Sponsor ID:

As Of Date:

Report Selector:  Central  Decentral

Willoughby, Hugh E

Step	Action
24.	Click the <b>Process Monitor</b> link. <a href="#">Process Monitor</a>

# Business Process Document



## PS FIN Grants Suite Inquiries and Reports: Award Activity- Summary



The screenshot shows the FIU Grants Suite interface. On the left is a menu with options like 'My Favorites', 'Customer Contracts', 'Grants', 'Awards', 'Institutions', 'Departments', 'Professionals', 'Sponsors', 'Subrecipients', 'Interactive Reports', 'FIU GM Reports and Processes', 'Award Activity Detail', 'Award Activity Summary', 'Project Costing', 'Billing', 'Accounts Receivable', 'Worklist', 'Tree Manager', 'Reporting Tools', 'People Tools', 'Change My Password', 'My System Profile', and 'My Dictionary'. The main area shows a 'Process List' tab. Below it is a 'View Process Request For' section with search filters for User ID (TEST\_GM\_INQ), Type, Last (1 Days), Server, Name, Instance, Run Status, and Distribution Status. A 'Refresh' button is present. Below the filters is a table with the following data:

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2247865		SQR Report	FIGRR006 TEST_GM_INQUIRY	TEST_GM_INQ	06/12/2009 11:42:28AM EDT	Initiated	N/A	<a href="#">Details</a>

At the bottom of the table, there are 'Save' and 'Notify' buttons, and a link 'Go back to Award Activity Summary Report'. The page also includes navigation links like 'Home', 'Worklist', 'Add to Favorites', 'Sign out', 'New Window', 'Help', and 'Customize Page'.

Step	Action
25.	Click the <b>Refresh</b> button. 
26.	<b>Note:</b> You may need to click the <b>Refresh</b> button multiple times until the Run Status runs to 'Success' and the Distribution is posted.
27.	<b>Note:</b> Verify the Run Status runs to " <b>Success</b> ".
28.	<b>Note:</b> Verify the Distribution Status is set to " <b>Posted</b> ".
29.	Click an entry in the <b>Details</b> column. 



# Business Process Document

## PS FIN Grants Suite Inquiries and Reports: Award Activity- Summary

The screenshot displays the FIU Grants Suite interface. On the left is a navigation menu with categories like 'My Favorites', 'Customer Contracts', 'Grants', 'Awards', 'Institutions', 'Departments', 'Professionals', 'Sponsors', 'Subrecipients', 'Interactive Reports', 'FIU GM Reports and Processes', 'Award Activity Summary', 'Project Costing', 'Billing', 'Accounts Receivable', 'Worklist', 'Tree Manager', 'Reporting Tools', 'People Tools', 'Change My Password', 'My System Profile', and 'My Dictionary'. The main content area is titled 'Process Detail' and shows the following information:

- Process:**
  - Instance: 2247865
  - Type: SQR Report
  - Name: FIGRR006
  - Description: Award Activity Summary Report
  - Run Status: Success
  - Distribution Status: Posted
- Run:**
  - Run Control ID: AM\_AWARD\_ACTIVITY
  - Location: Server
  - Server: PSUNX
  - Recurrence:
- Date/Time:**
  - Request Created On: 06/12/2009 11:42:53AM EDT
  - Run Anytime After: 06/12/2009 11:42:28AM EDT
  - Began Process At: 06/12/2009 11:43:02AM EDT
  - Ended Process At: 06/12/2009 11:44:44AM EDT
- Update Process:**
  - Hold Request
  - Queue Request
  - Cancel Request
  - Delete Request
  - Restart Request
- Actions:**
  - [Parameters](#) Transfer
  - [Message Log](#)
  - Batch Timings
  - [View Log/Trace](#)

At the bottom of the main content area are 'OK' and 'Cancel' buttons.

Step	Action
30.	Click the <a href="#">View Log/Trace</a> link. <a href="#">View Log/Trace</a>

# Business Process Document

## PS FIN Grants Suite Inquiries and Reports: Award Activity- Summary



**FIU** Home | Worklist | Add to Favorites | Sign out

Search:  [New Window](#) | [Help](#) | [Customize Page](#) |

**Menu**

- My Favorites
- Customer Contracts
- Grants
  - Awards
  - Institutions
  - Departments
  - Professionals
  - Sponsors
  - Subrecipients
- Interactive Reports
- FIU GM Reports and Processes
  - Award Activity Detail
  - Award Activity Summary
- Project Costing
- Billing
- Accounts Receivable
- Worklist
- Tree Manager
- Reporting Tools
- People Tools
  - Change My Password
  - My System Profile
  - My Dictionary

**View Log/Trace**

Report

Report ID: 2157407 Process Instance: 2247865 [Message Log](#)

Name: FIGRR006 Process Type: SQR Report

Run Status: Success

Award Activity Summary Report

Distribution Details

Distribution Node: unixnode Expiration Date: 08/11/2009

**File List**

Name	File Size (bytes)	Datetime Created
<a href="#">SQR FIGRR006_2247865.log</a>	1,734	06/12/2009 11:44:44.000000AM EDT
<a href="#">fiarr006_2247865.PDF</a>	12,504	06/12/2009 11:44:44.000000AM EDT
<a href="#">fiarr006_2247865.out</a>	1,380	06/12/2009 11:44:44.000000AM EDT

**Distribute To**


Distribution ID: \*Distribution ID

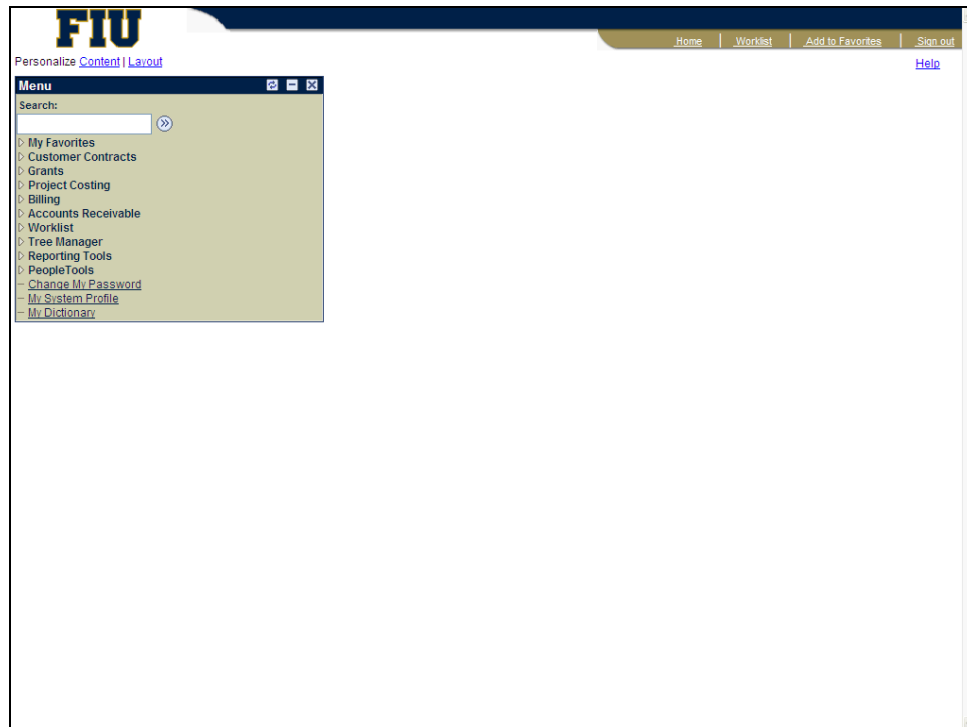
ID Type


User: TEST\_GM\_INQUIRY

[Return](#)

Step	Action
31.	Click the <b>PDF</b> link. <a href="#">fiarr006_2247865.PDF</a>
32.	Click the <b>Maximize/Restore</b> button. 
33.	Click the <b>Maximize Page View</b> object. 
34.	<b>Note:</b> The heading section of the report contains the demographic information for the Award.
35.	<b>Note:</b> The Award Summary Report displays a row for each Project ID related to the Award.

Step	Action
36.	<p><b>Note:</b> The Award Summary reports contains the following columns:</p> <ul style="list-style-type: none"> <li>- Award to Date Budget</li> <li>- Award to Date Expenses</li> <li>- Pre- Encumbrance</li> <li>- Encumbrance</li> <li>- Available Balance</li> <li>- Available Percentage</li> <li>- Billed</li> <li>- Unbilled</li> <li>- Revenue</li> </ul>
37.	<p>Click the <b>Close</b> button.</p> 



Step	Action
38.	<p>Click the <b>Home</b> link.</p> 
39.	<p>Congratulations. You successfully ran an Award Activity- Summary Inquiry. <b>End of Procedure.</b></p>