



**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>	9/4/2009
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<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**

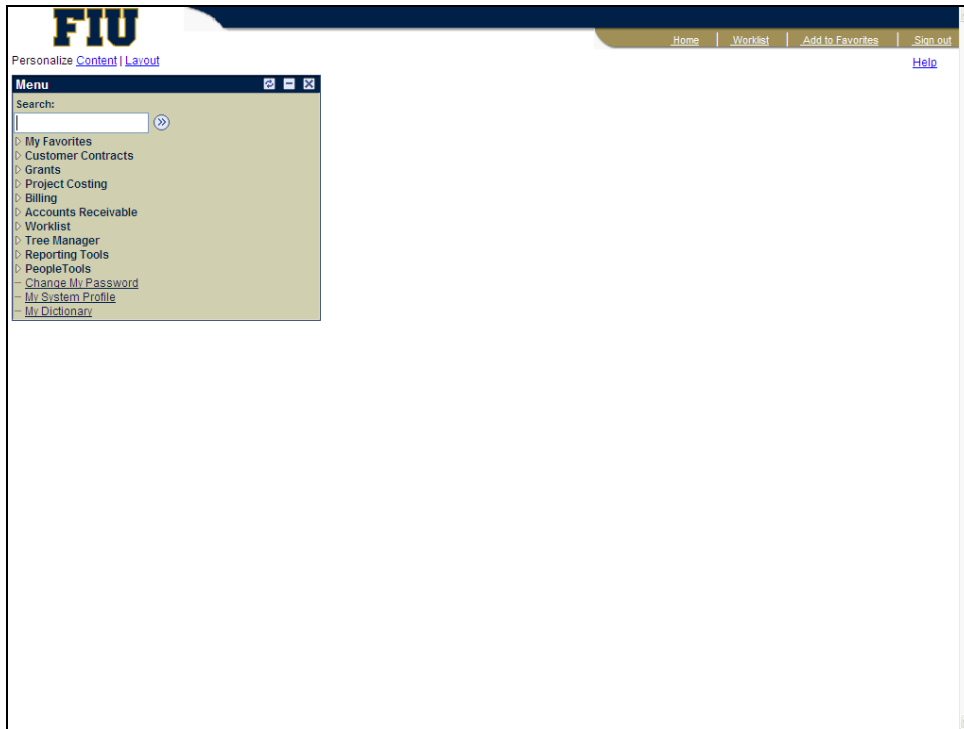
# Business Process Document


## 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.

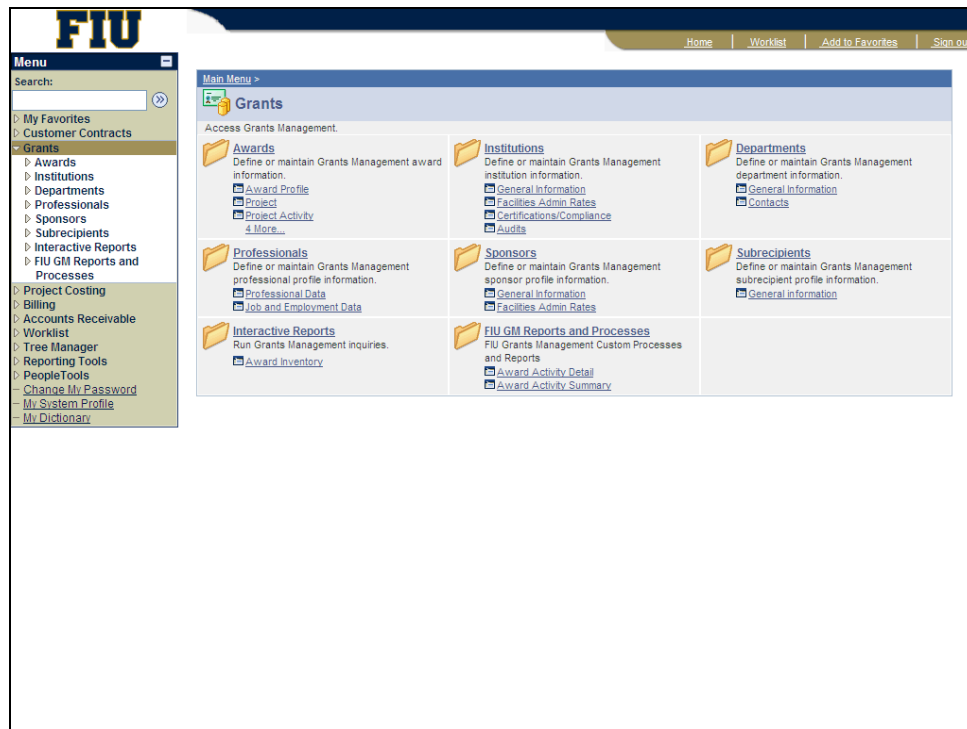




Step	Action
1.	Click the <b>Grants</b> link. 



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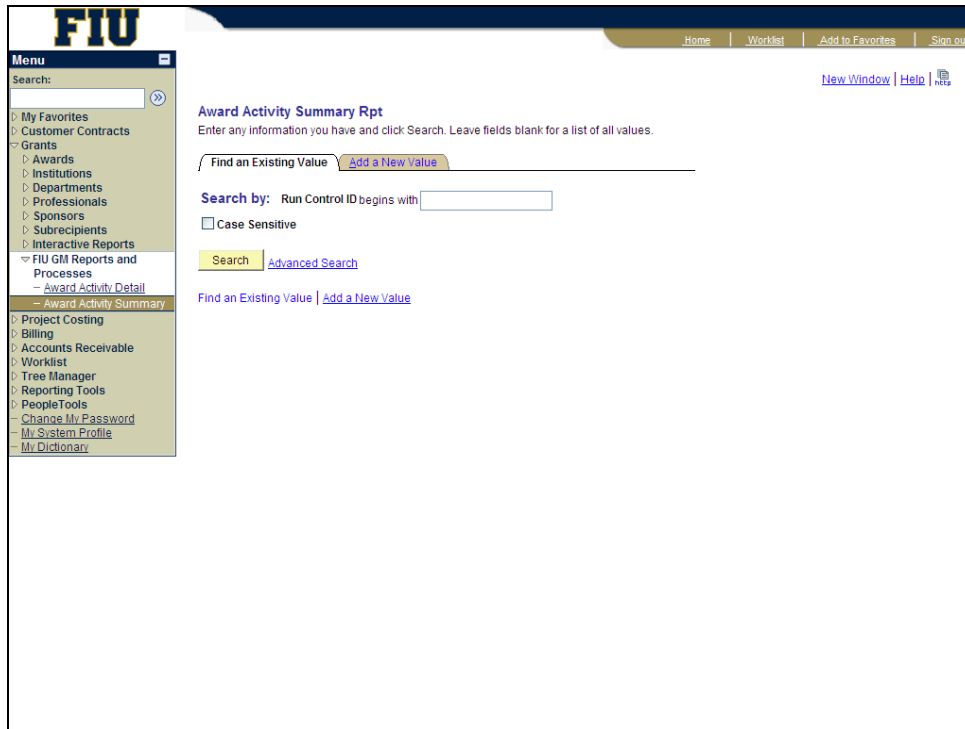
## PS FIN Grants Suite Inquiries and Reports: Award Activity- Summary



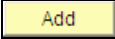


Step	Action
2.	Click the <b>FIU GM Reports and Processes</b> link. 
3.	Click the <b>Award Activity Summary</b> link. 
4.	<b>Note:</b> If this is the first time you are running the Award Activity Summary Report, click on the "Add a New Value" tab. If you have previously created a Run Control stay on the "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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
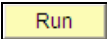
## PS FIN Grants Suite Inquiries and Reports: Award Activity- Summary

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. 



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**Process Scheduler Request**


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

Server Name:  Run Date: 06/12/2009

Recurrence:  Run Time: 11:42:28AM

Time Zone:

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



# Business Process Document

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

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### 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



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**Process Scheduler Request**

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

Server Name:       Run Date:

Recurrence:       Run Time:      

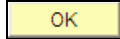
Time Zone:

**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.





# Business Process Document

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

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### Award Activity Summary Report

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

Process Instance:2247865

Report Request Parameters

\*Business Unit:      Central     Decentral

Award ID:

Department:

Contract Admin:

PI ID:     Willoughby, Hugh E

Sponsor ID:

As Of Date:



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 'Award Activity Summary' page in the FIU PS FIN Grants Suite. The interface includes a navigation menu on the left, a search bar, and a table of process requests. The table has the following columns: Select, Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. A single entry is visible with Instance 2247865, Process Type SQR Report, Process Name FIGRR006 TEST\_GM\_INQUIRY, User TEST\_GM\_INQ, Run Date/Time 06/12/2009 11:42:28AM EDT, Run Status Initiated, and Distribution Status N/A. The 'Details' column for this entry contains a link to view more information.

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 GIM 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: (empty).
- 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.
- Actions:** Parameters, Transfer, Message Log, Batch Timings, View Log/Trace.

At the bottom of the process detail section are 'OK' and 'Cancel' buttons.

Step	Action
30.	Click the <b>View Log/Trace</b> 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](#)

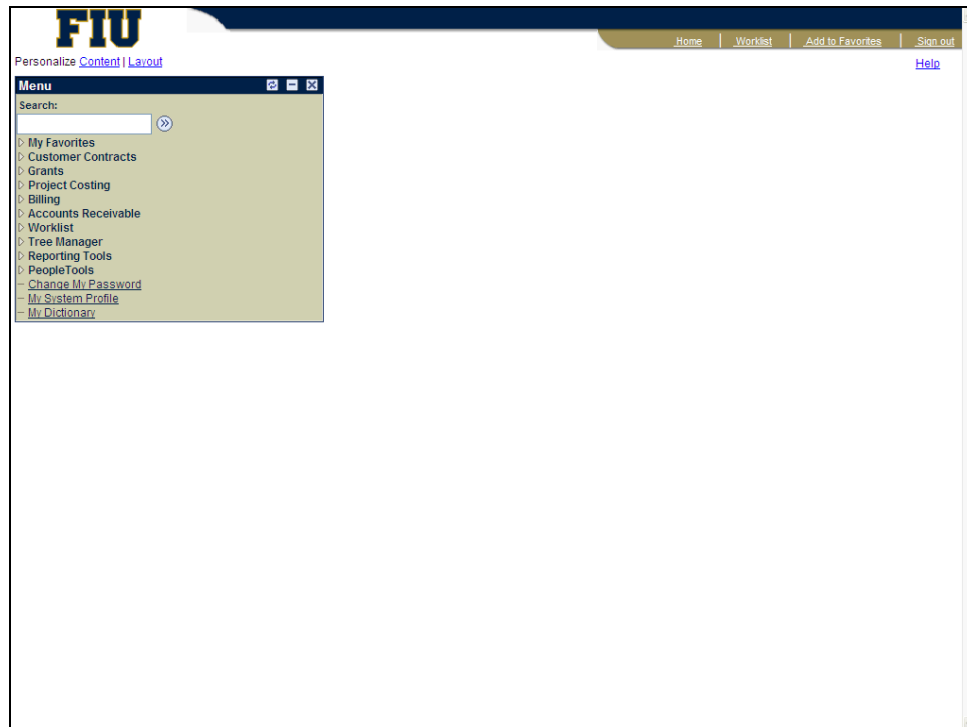
Step	Action
31.	Click the <b>PDF</b> link. <a href="#">fiarr006_2247865.PDF</a>
32.	Click the <b>Maximize/Restore</b> button. 
33.	Click the <b>Maximize Page View</b> object. 
34.	<b>Note:</b> The heading section of the report contains the demographic information for the Award.
35.	<b>Note:</b> The Award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




## Business Process Document

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

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>