

# Generate Sponsored Project Summary Report

The **Sponsored Project Summary Report** provides a summary of Project activity by budget account (e.g. G4010 = Salaries, G4020 = Fringe, etc.). This report may be used for monitoring Cost Share totals and burn rates.

**Note:** The Sponsored Project Summary Report does not provide transaction level data.

1. To generate the Sponsored Project Summary Report, navigate to: **Navigator (NavBar) > UTZ Customizations > Grants Management > Reports > Sponsored Project Summary Report**
2. The **Sponsored Project Summary Report** search page is displayed.
  - **First Time User - Create a Run Control ID:**
    - a) Click the **Add a New Value** tab.
    - b) Provide a meaningful name for your **Run Control ID** (up to 30 characters, no spaces, case-sensitive). **Run Control ID Example:** sponsor\_project\_summary.
    - c) Click the **Add** button. Proceed to **step 3**.
  - **Returning Users - Use an Existing Run Control ID**
    - a) From the **Find Existing Value** page, enter the **Run Control ID** in the **Search by** field .
    - b) Click **Search**. Proceed to **step 3**.

**Optional:** You may leave the **Search By** field blank and click the **Search** button. If you have created only one Run Control, the **Sponsor Project Summary Report** page displays. If you have multiple Run Controls, a **Search Results** table will display where you must select the appropriate Run Control ID to use.
3. The **Sponsored Project Summary Report** page is displayed. This page is used to enter the parameters for the report:
  - **First Time Users:** The fields on the page are blank. You will be required to provide the conditions for your report. Proceed to **step 4**.
  - **Returning Users:** The fields on the page will default with the settings that were last used or saved. Verify the **Business Unit** is **UTSSP**. Proceed to **step 5**.
4. Enter **UTSSP** in the **Business Unit** field. (required field)
5. Complete or update the remaining report parameters:
  - a) The following fields are required:
    - Enter or lookup the **Fiscal Year** (e.g. 2016).
    - Enter or lookup the accounting **Period** (e.g. **1** = Sept, **2** = Oct, **3** = Nov, etc.).
  - b) Provide information for at least one of the following fields:
    - Enter or lookup the name of the **Sponsor** (e.g. SPN00004 = Department of Labor).
    - Enter or lookup the Empl ID of the **Award PI** (e.g. 100067890).
    - Enter or lookup the **Award Number**.
    - Enter or lookup the **Project** number (e.g. 1264908490).
    - Enter or lookup the **Department** 6-digit number (e.g. 625123).
6. Click the **Save** button to save the conditions of your report.

Sponsored Project Summary

**Sponsored Project Summary**

Run Control ID: Sponsor\_Project\_Summary [Report Manager](#) [Process Monitor](#)

Report Request Parameters

\*Business Unit:   Fiscal Year:   Period:

Sponsor:

Award PI:

Award Number:

Project:

Department:

7. To generate the report, click the **Run** button.
8. The **Process Scheduler Request** page is displayed. Make sure that the report **Type** is displaying: "Web." If necessary, change the **Format** field "**PDF**" (Portable Document Format) and then click **OK** to return to the **Sponsored Project Summary Report** page.

**Optional:** To send the statements to additional users, click the **Distribution** link and enter the recipients information (e.g. Empl ID).
9. A **Process Instance** number is now assigned (e.g. 1895241). This number is used to track your report from the **Process Monitor** page. Click the **Process Monitor** link.
10. The **Process Monitor** page is used to view the status of the report. Initially, the **Run Status** is "Queued" and the **Distribution Status** is "N/A."

It may be necessary for you to click the **Refresh** button multiple times (every 20 seconds), until the **Run Status** is "Success" and the **Distribution Status** is "Posted."

Once the statuses have changed to the appropriate values (Success and Posted), click the **Go back to Sponsored Project Summary Report** link.
11. From the **Sponsored Project Summary Report** page, click the **Report Manager** link to view the report.
12. The **Report Manager** page is displayed. The report will generate two output files. Select the report with the file extension **.pdf** (e.g. UTZ\_FJ501.pdf) located under the **Report** column.
13. From the **File List** grid, click the file name to open the report (e.g. UTZ\_Fj501.pdf).

**Note:** Depending on your browser, you may be presented with a dialog box prompting you to **Save** or **Open** the report; or the report may open immediately in a new window. Congratulations, you have successfully generated the report.

## Award and Project Information

### View Award Information:

The Award Profile page provides important information for an award. This page contains details for the sponsor and the associated projects. Each award must have at least one project. The Award Profile page is used to review information, such as status of the award, award start and end date, and the associated projects.

1. To view the Award Profile page, begin by navigating from the **Main Menu > Grants > Awards > Award Profile**.
2. If necessary, enter **Business Unit** "UTSSP."
3. Enter the desired search criteria (e.g. Award ID, or Project number, or PI ID).
4. Click **Search**. The Award Profile page is displayed.

### View Project Information:

The Project page provides important information for a project. This page is used to view details, such as the status of the project, and the project start and end date.

1. To view Project Information, begin by navigating from the **Main Menu > Grants > Awards > Project**.
2. If necessary, enter **Business Unit** "UTSSP."
3. Enter the **Project** number that you want to view.
4. Click **Search**. The Project page is displayed.

### View Project Budget Accounts:

The Project Budget Detail page displays all the budget accounts (e.g. G4020) associated with a specific Project, a description of the budget account and dollar amount budgeted for each account.

1. To view Project Budget Detail, begin by navigating from the **Main Menu > Grants > Awards > Project Budgets**.
2. If necessary, enter **Business Unit** "UTSSP."
3. Enter the **Project** number that you want to view.
4. Click **Search**. The Project Budgets page is displayed.

### Things to know...

The **Accounting Period** indicates the month in which the transaction took place. The Accounting Periods are:

1 = Sept	4 = Dec	7 = Mar	10 = June	998 = Year-end Adjusting Entries
2 = Oct	5 = Jan	8 = Apr	11 = July	
3 = Nov	6 = Feb	9 = May	12 = Aug	

The **Budget Account** is used to identify the purpose of the funds. Listed below are examples of Budget Accounts:

Sponsored Projects Budget Accounts		
G4010	Salaries	G5010
G4020	Fringe Benefits	G5030
G4040	Equipment Fabrication	G5050
G4050	Equipment Capital	G5060
G4070	Consultants	G5080
G4082	STEM Tuition	G5105
G4090	Other Direct Costs	G5110
G4100	Rentals & Leases	G5120
G4105	Rental Equipment	G5125
G4110	Travel - Domestic	G5130
G4120	Travel - Foreign	G5140
G4130	Participant Expenses	G5150
G4140	Scholarship & Fellowship	G5160
G4150	Tuition & Fees	G5170

The **Fiscal Year** represents the period when the transaction was processed. It is the established period of time when the university annual financial records commence and conclude.

UT San Antonio's Fiscal Year occurs from Sept. 1st through Aug. 31st. It is derived from the date on which the fiscal year-ends. For example, if the fiscal year begins on September 1, 2015 and ends on August 31, 2016 financial activity will be posted to Fiscal Year 2016.