

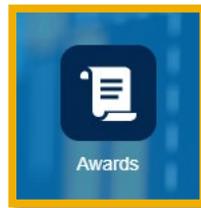
**PPM TASK: SEARCHING FOR AND VIEWING SPONSORED PROJECT BUDGET AND EXPENSES**

Use this help guide search the Awards Module and view PPM Sposored projects data in Oracle

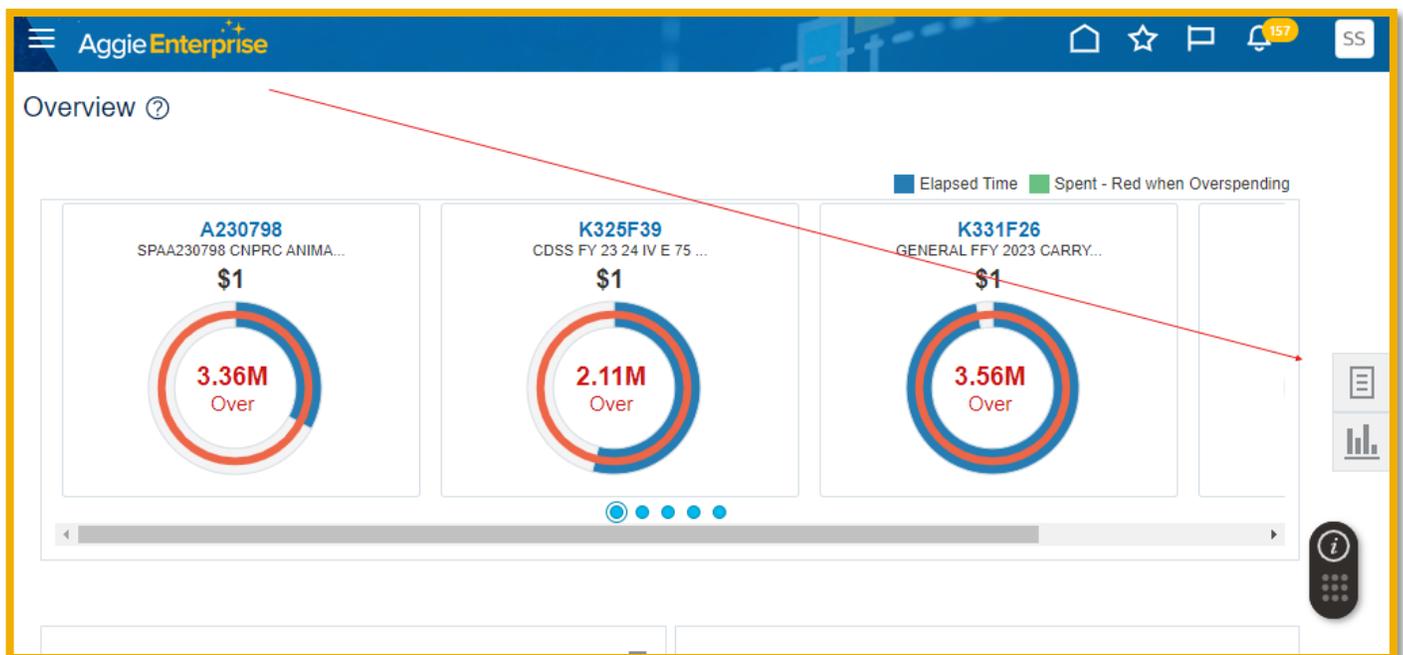
**NAVIGATION:**

Oracle Home Page > Awards >

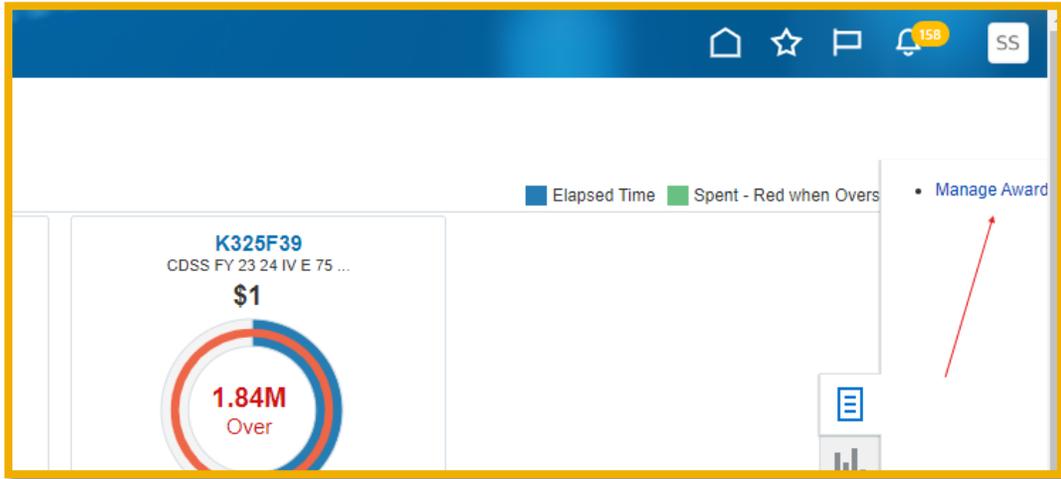
Step	Action
1.	From the Home Page, select the Awards Module by clicking on the Awards Icon.



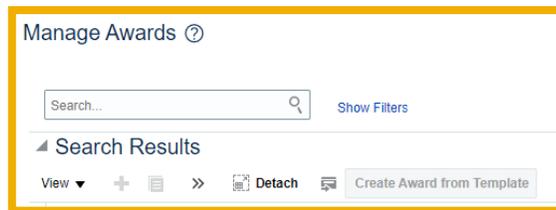
Step	Action
2.	You will be taken to an Overview page showing the most recent Awards accessed. Select the Icon on the right that looks like paper with lines 



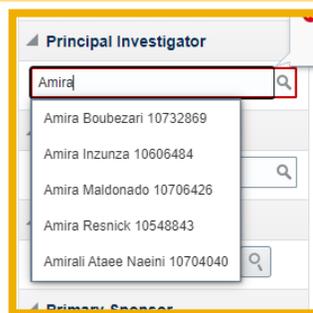
Step	Action
3.	Select the <b>Manage Award</b> link in the pop-up menu.



Step	Action
4.	You are now in the <b>Manage Awards</b> screen. From this screen you can search for your sponsored projects.



Step	Action
5.	Select the <b>Show Filters Link</b> . A panel of filter options will appear on the left-hand side of the page. Type the <b>First and Last Name</b> of the PI in the Principal Investigator box and select the correct name from the list of results.



Step	Action
5a.	If the name does not show up in the text box <b>Select the magnifying glass</b> to reveal advanced search options.

Step	Action
6.	Once the PI name is in the <b>Selected</b> the filtered results show all of Amira Resnick’s sponsored projects.

Hide Filters | Principal Investigator Amira Resnick X

Search Results

View + [Grid Icon] [List Icon] [Print Icon] [Share Icon] Detach [Create Award from Template]

Name	Number	Primary Sponsor	Status	End Date	Principal Investigator
Adult Immunization with Migrant Mexican In...	KL79F04	EXTENSION FOUNDAT...	Active	11/30/24	Amira Resnick
Increasing Equity driven approaches to food ...	KL31F45	EXTENSION FOUNDAT...	Expired	5/31/24	Amira Resnick
UC CalFresh Nutrition Education Program U...	KL79D32	REGENTS OF THE UNI...	Expired	9/30/23	Amira Resnick
Y236855 BRIDGE funding for EXCITE proje...	Y236855	EXTENSION FOUNDAT...	Active	3/31/25	Amira Resnick
UC CalFresh Nutrition Education Program U...	KL81F48	CALIFORNIA DEPART...	Active	9/30/24	Amira Resnick
UC CalFresh Nutrition Education Program U...	KL31F26	REGENTS OF THE UNI...	Active	9/30/24	Amira Resnick

Step	Action
7.	You can <b>save the search criteria</b> in the <b>Saved Search</b> drop down menu for easy access to it in the future.

Saved Search

Recent Awards [Save]

Active Awards

Awards Expiring in 30 Days

Expired Awards [Settings Icon]

Overspending Awards

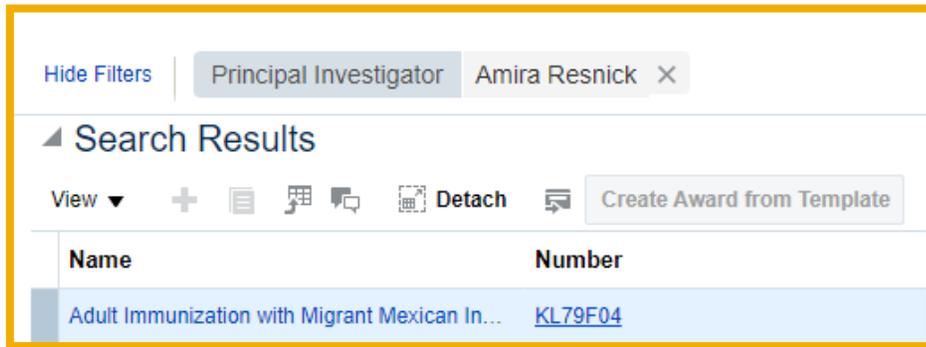
Recent Awards

Underspending Awards

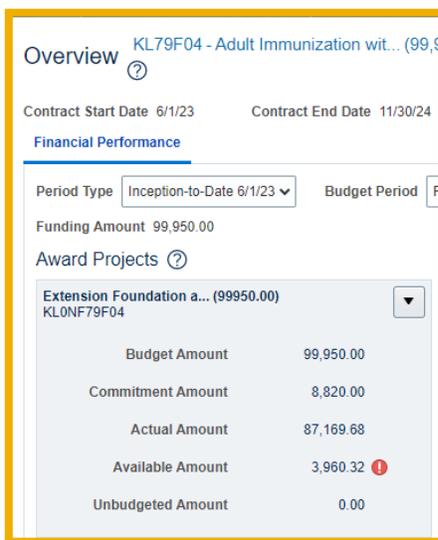
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Manage Saved Searches

Step	Action
8.	Once you have filtered the search results <b>select the award number</b> for more details on Budget, Actuals and Balance available.



Step	Action
9.	Once on the <b>Overview Page</b> you will see a summary of the Budget, Commitment, Actual Expenses and Available Amount.



Step	Action
10.	The bottom of the <b>Overview Page</b> shows the Budget, Commitment, Actual Expenses and Available Amount by expenditure category.

Extension Foundation award EXC3 2023 KL0NF79F04 (KL0NF79F04): Financial Details ?

View ▼ 📄 Detach

	Task	Resource	Funding Source	Budget Amount	Commitment Amount	Actual Amount	Available Amount
▶	TASK01	Fringe Benefits	EXTENSION FOUNDATION	10,113.00	0.00	8,981.42	1,131.58
▶	TASK01	Indirect Costs	EXTENSION FOUNDATION	20,625.00	0.00	18,006.06	2,618.94
▶	TASK01	Salaries and Wages	EXTENSION FOUNDATION	24,128.00	0.00	18,541.51	5,586.49
▶	TASK01	Supplies	EXTENSION FOUNDATION	42,204.00	8,820.00	40,386.69	-7,002.69
▶	TASK01	Travel	EXTENSION FOUNDATION	2,880.00	0.00	1,254.00	1,626.00

Step	Action
11.	You can view transaction details from the <b>Overview Page</b> by selecting the dropdown in the gray box and choosing <b>Manage Project Costs</b> .

Award Projects ?

Extension Foundation a... (99950.00)  
KL0NF79F04

Budget Amount	99,950.00
Commitment Amount	8,820.00
Actual Amount	87,169.68
Available Amount	3,960.32 <span style="color: red;">!</span>
Unbudgeted Amount	0.00

▼

Manage Project Costs

Manage Cost Distributions

Manage Committed Costs

Step	Action
12.	You will be taken to the <b>Costs Module of PPM</b> which will be displaying all cost details for the award.

Manage Project Costs KL79F04 - Extension Foundation ...

Search

Search Results

Actions View Format >> Detach Wrap Create Mass Adjustment

Transaction Number	Accounting Period	Project Number	Project Name	Task Name	Ex Or	Expenditure Type
▶ 236060	Sep-23	KL0NF79F04	Extension Foundation award EXC...	TASK01	9...	536004 - In State Meals Incidentals
▶ 247706	Sep-23	KL0NF79F04	Extension Foundation award EXC...	TASK01	9...	508000 - Composite Benefit Rate Campus Payment C
▶ 247635	Sep-23	KL0NF79F04	Extension Foundation award EXC...	TASK01	9...	536002 - In State Lodging
▶ 250091	Sep-23	KL0NF79F04	Extension Foundation award EXC...	TASK01	9...	500098 - Other Academic Salaries and Wages Expen

Step	Action
13.	To view transaction detail, select the <b>Transaction Number</b> to drill down on more data.

Search Results

Actions View Format >> Detach Wrap Create Mass Adjustment

Transaction Number	Accounting Period	Project Number	Project Name
▶ 3983437	Jul-24	KL0NF79F04	Extension Foundation award EXC...

Step	Action
14.	This will take you to the details of the transaction which may have the invoice number, payroll employee and other information. Select <b>DONE</b> twice to bring you back to the <b>Award Module</b> .

Project Cost Transaction: 3983437

General Costing Billing Borrowed and Lent Intercompany Billing Adjustment History

Project Number KL0NF79F04  
 Task Number TASK01  
 Expenditure Item Date 3/31/24  
 Expenditure Type 538000 - Facilities and Administration Costs FA  
 Expenditure Organization 9924261 - Community Nutrition and Health  
 Contract Number KL79F04  
 Funding Source EXTENSION FOUNDATION

▲ Source Document Details

Transaction Source Oracle Fusion Projects  
 Document Summarized Burden Expenditure  
 Source Transaction Number 3905405

Step	Action
15.	Return to the main results window by selecting <b>Done</b> button on the right-hand side of the screen.

Step	Action
16.	From the main results window, you can export the results to Excel by selecting the <b>Export</b> button.

Manage Project Costs ?

► Search

▲ Search Results

Actions ▼ View ▼ Format ▼    Detach ◀ Wrap Create Mass Adjustment

	Transaction Number	Accounting Period	Project Number	Project Name	Task Name
▶	236060	Sep-23	KL0NF79F04	Extension Foundation award EXC...	TASK01
▶	247706	Sep-23	KL0NF79F04	Extension Foundation award EXC...	TASK01
▶	247635	Sep-23	KL0NF79F04	Extension Foundation award EXC...	TASK01
▶	250091	Sep-23	KL0NF79F04	Extension Foundation award EXC...	TASK01

Step	Action
17.	View the report and edit in Excel <span>End of Procedure.</span>