9.2 Grants Portal

Purpose: Use this document to navigate through the central navigation page in Grants in ctcLink.

Audience: Finance/Grant Fiscal Staff.

- You must have at least one of these local college managed security roles:
 - ZZ Grants Portal

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

The ctclink **Grant Portal** is a central navigation page in ctclink Grants for award, project, personnel, and transaction pages. It provides links to key grant management-related features and enables users to drill down to the details of transactions and documents.

The **Grants Portal** enables principal investigators (PI) and project managers (PM) to access information about sponsored project efforts. The portal provides PIs and PMs immediate insight into essential information regarding awards so that they can manage fiscal responsibilities and work more productively when interacting with the ctclink Grants module.

This QRG will show the following:

- Adding a Principal Investigator (PI)
- Viewing Award Date: Summary and Detail
- Viewing Project Data: Summary and Detail

Grants Portal

Adding a PI/Project Manager

Navigation: NavBar > Navigator > Grants > Grants Portal > Security Access > Grants Portal Access

- 1. On the **PI/Project Manager Access** page, enter your **Employee ID**.
- 2. Select Search.

Grants Portal	Security								
PI/Project M	anager Acc	ess							
The employees e	ntered in the grid	d will be given a	eccess to all awa	ards and projects that th	e Pl/Project Manager	entered in the Assigned By Employee	ID has access to		
Search Criteri	a 🕐								
Assi	gned By Emplo		03109 Q Search	Wood, Casey					
Employees Gra	inted Portal P	age Access	0						
φ, Q						H	1-1 of 1		View All
Empl ID	Name	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
						09/04/18 10:06:43.000000AM			
PIProject Manage Save	r		Division	Awar	d Project	Employee			

- 3. Add a line by selecting the add (+) button.
- 4. Enter or look up the Principal Investigator or Project Manager's **Empl ID**.
- 5. Determine the appropriate access for the employee and select the **Award Page** and **Project Page** checkboxes as needed.
- 6. You can also add an **End Date** if desired. Access will end on that date.
- 7. Select **Save**.

Grants Porta									
PI/Project N	lanager Acce	SS							
The employees of	entered in the grid v	will be given :	access to all aw	rards and projects that	the PI/Project Manag	er entered in the Assigned By Employee	ID has access to.		
Search Criter	ia 🕐								
	igned By Employe		003109 Q Search	Wood, Casey					
Π, Q			Ŭ				ы	4 1-2 of 2 -> ->	View All
Empl ID	Name	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
101000000	4 lico	V	Y	5		9:14:15.000000AM	09/04/18 9:14:46AM	CTC_KCLARK	+
101003109	Wood, Casey	\checkmark				09/04/18 9:13:25.000000AM	09/04/18 9:14:56AM	CTC_KCLARK	+
PVProject Manag Save	7		Division	Award	Project	Employee			

Viewing Award Summary Data

Navigation: NavBar > Navigator > Grants > Grants Portal > Award Information > Award Summary

1. On the **Award Summary** page, select the **Refresh** button to populate the **Detail Section** of the page.

Award Summary					
Hello, Casey Wood	You have 1 new items in y	our worklist.	Last Process	Date/Time	
To change your search criteria, clic	k Set Search Criteria. Set S	earch Criteria	Refresh Maximur	m Rows to Retrieve 50	
Financial Calculating Option	2)			Burn Rate Indicator	
Balance	s Both v	Include FA		Potential Under Spe	-
Budget Period From	nQ	Through Q		 Average Rate Spend 	-
Date Selectio	n As of Date ~	B	Recalculate	Potential Over Spen	iding
Institution & Sponsor Links					

- 2. Select the **Demographics** tab.
- 3. Notice the number of rows that are being retrieved are displayed in the **Maximum Rows to Retrieve** field. This number can be adjusted if needed.
- 4. This is where you can select to see the next 50 awards.
- 5. Select or deselect awards using the checkboxes.
- 6. If a different selection of awards is chosen, you will need to select the **Update Total Amount** button.

change	e your search criteria, click Se	t Search Criteria. Set Search Crit	eria	Refresh	Maximun	Rows to Re	trieve 50 B	
-	al Calculating Option (2)	ou our of					Burn Rate Indicator	
	Balances B Budget Period From Date Selection A	Q Throug	Include F <u>A</u>	Reca	alculate		 Potential Under Spending Average Rate Spending Potential Over Spending 	
arch R	Results							of 4 🖬 H
tail emogr	raphics 2) Com	ipliance			Personaliz	e Find Vie		of 50 🛞 Last
	Award ID	Short Title	Primary Project	Project Title	Award Begin Date	Award End Date	Sponsor	Reference
V	000000000000000000000000000000000000000	College Spark Washington	Primary Project	Project Title	07/01/2011	06/30/2016	College Spark Washington	
		COLOTEL Decemb	0000001077	GSI STEM	03/01/2015	08/30/2016	Greater Spokane Incorporated	
	5 0000000000000000000000000000000000000	GSI STEM Research						
	5 0000000000000000000000000000000000000		0000001078	Washington STEM	07/05/2011	07/04/2016	Washington STEM	Washingt
			0000001078	Washington STEM	07/05/2011	07/04/2016	Washington STEM	Washing
Dese	000000000000000000000000000000000000000	Washington STEM	000001078	Washington STEM	07/05/2011	07/04/2016	Washington STEM	Washing
V	000000000000000000000000000000000000000	Washington STEM <	0000001078 Expen		07/05/2011	07/04/2016 Invoic		Washing
Dese	ccccoccccccccccccccccccccccccccccccccc	Washington STEM Constraints C		ded 10,094,818.23	07/05/2011		red 1,500,304.08 red 1,442,173.95	Washing

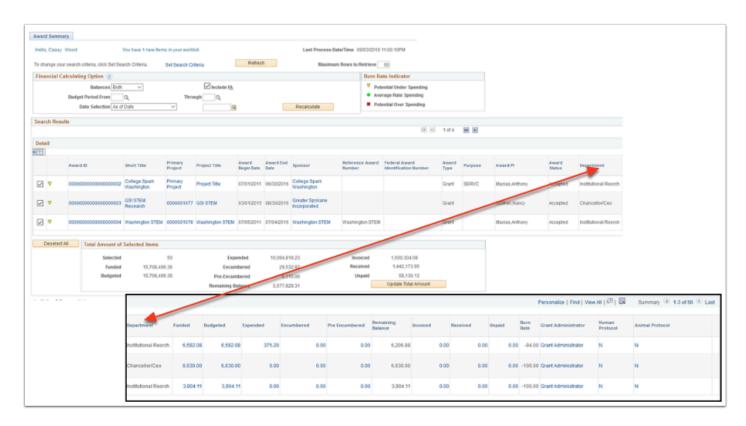
7. Select the Financial tab to view Funded, Budgeted, Expended, Encumbered, Remaining Balance, Invoiced, Received, Unpaid, Burn Rate and the Grant Administrator.

wan	d Sum	imary												
ello	Case	y Wood		You have '	new items in you	r worklist.			Last Process	Date/Time 09/0	3/2018 11:00:10	PM		
ch	ange y	our searc	h criteria, click Set	Search Crite	ria. Set Sea	irch Criteria	Refre	sh	Maxim	um Rows to Retr	ieve 50			
ina	ncial	Calculati	ng Option 👔							E	Burn Rate Indica	ator		
			Balances	ith 🖂		⊡ Inc	lude FA				Potential Un	der Spendin	9	
		Budget	Period From	Q		Through	2				 Average Rat 	te Spending		
		D	ate Selection As	of Date	~				Recalculate		Potential Ov	ver Spending		
	ch Re													
any	un rue:	SUILS										R R	1 of 4	H H
eta										ilze Find View		Summary		
	nograp	hics E	inancial Comp	liance	a				Persona	lize Find View	ALL DO L DA	Summary 4	1-3 of 50	@ Last
	- gr up	Award ID		Funded	Budgeted	Expended	Encumbered	Pre Encumbered	Remaining Balance	Invoiced	Received	Unpaid	Burn Rate	Grant Admi
	_													
2	۷.	0000000	000000000000000002	6,582.08	6,582.08	375.20	0.00	0.00	6,206.88	0.00	0.00	0.00	-94.00	Grant Adr
2			0000000000003	6.630.00	6.630.00	0.00	0.00	0.00	6.630.00	0.00	0.00	0.00	-100.00	Grant Adr
-	·		000000000000000000000000000000000000000	6,630.00	6,630.00	0.00	0.00	0.00	0,030.00	0.00	0.00	0.00	- 100.00	Gram Au
2	v	0000000	0000000000000004	3,904.11	3,904.11	0.00	0.00	0.00	3,904.11	0.00	0.00	0.00	-100.00	Grant Adn
				<										>
D	eselec	t All	Total Amount	of Selected	lane									
			Total Psiloant	or delected										
			Selecte	-	50		Expended	10,094,818		Invoice		304.08		
			Funde Budgete		5,708,496.36 5,708,496.36		Encumbered	29,532		Received		173.95		
			buogete	10 1	0,100,480.30	Pre	-Encumbered	6,316	00	Unpair		Total Amount		

- 8. Select the **Compliance** tab to view the **Protocols** that were entered in the **Award Proposal**.
- 9. Select the icon to view the entire detail row.

ello, Casey V	Vood	You h	ave 1 new items in your wor	klist.	Last Pr	rocess Date/Time 09/03/201	8 11:00:10PM	
change your	easch	criteria, click Set Search C	criteria. Set Search (Re	fresh	Maximum Rows to Retrieve	50	
			aniena. Set Search v	Anteria				
nancial Cal	iculati	ng Option (2)					Rate Indicator	
		Balances Both	~	Include FA			otential Under Spending verage Rate Spending	
	_	t Period From		ough		-	otential Over Spending	
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arch Result	15							
			•				e e 1 of 4	H H
etail		U			Personalize Fi	ind View All 💷 🔢	Summary 🛞 1-3 of 50 🛞 Last	
emographics	Ð	nancial Compliance						
		Award ID			Human Protocol	Animal Pro	tocol	
\checkmark	•	000000000	000000002		N	N		
\checkmark	~	0000000000	000000003		N	N		
\checkmark	•	000000000	0000000004		N	N		
Deselect A		Total Amount of Sele	cted Items					
		Selected	50	Expended	10,094,818.23	Invoiced	1,500,304.08	
		Funded	15,708,496.36	Encumbered	29,532.82	Received	1,442,173.95	
		Budgeted	15,708,496.36	Pre-Encumbered	6,316.00	Unpaid	58,130.13	
				Remaining Balance	5,577,829.31		Update Total Amount	

10. The row is too long to fit on one page so the following example shows the expanded row in two parts.



Viewing Award Detail Data

Navigation: NavBar > Navigator > Grants > Grants Portal > Award Information > Award Detail

- 1. On the **Award Detail** tab of the **Award Detail** page, you are able to choose a specific **Award**.
- 2. Enter or look up a **Business Unit**.
- 3. Enter or look up an Award ID.
- 4. Select Search.

o, Casey Wood	You have 1 new items in your w	orklist.	Last Process Date/Time 09/03/2018 11:00:
arching Option			
Business Unit	WA170 Q	Award ID 000000000000000314 Q	el-civics grant Search
ancial Calculating Option ③			
Balances	Both	Include FA	
Budget Period From	Q,	Through Q	
Date Selection	As of Date ~		Recalculate
Date Selection	As of Date		Recalculate
rard Title Contact PI	Ames,Linda Dianne	Spon	or State Board for Comm & Tech Colleges
Contact PI	Ames,Linda Dianne El Civics 2008-2009	Spon: Ref Aw	01
Contact PI	El Civics 2008-2009		1# 117-ielc-18
Contact PI Department	El Civics 2008-2009 Accepted	Ref Aw	i# 117-ielc-18 D#
Contact Pi Department Award Status	El Civics 2008-2009 Accepted Grant	Ref Aw Federal Awd	tor Grant Administrator
Contact PI Department Award Status Award Type	El Civics 2008-2009 Accepted Grant 8.00	Ref Awd Federal Awd Grant Administr Begin D	tor Grant Administrator

- 5. Select the **Demographic** tab.
- 6. This tab includes the **PI** and the **Project**(s) associated with the award, the type of contract associated with the award, the Primary Project and any **Amendments** associated with the contract.

Award Detail	Demographic	Project	Budget State	15							
Hello, Casey Wood		You have 1	new items in your wo	untilet.					Last Proc	ss Date/Time	09/03/20
Searching & Calc	ulation Option										
Budg	iness Unit WA170 get Period Selection As of Da	te	Award ID Through	000000000000000000000000000000000000000		el-civics (grant				
Administrative											
Previous Contra	Bilin	g Term	Ρ	0:							
Professional Reso	urce								_		
m, Q							14 4	1-1 of 1	~ >	View A	
PC Business Unit	Project	Team Memb	ber Name		Project R	ole	Description	n	% Effort		
WA170	0000001938	101001622	Tucker,	Flynn	PI		Principle Inv	vestigator			
Terms and Condition	20										
m, q							< 1	1 of 1 🖂	$\models = \exists I$	View All	
PC Business Unit	Terms & Condit	tions	Description			Explana	tion				
Attributes											
I Q						н	- 1-1 c	ft 🗸 🔿		View All	
Attribute Value			Com	ments							
Amendments											
m, q							н. н.	1-1 of 1 🖂	$\mathbb{P} = \mathbb{H}$	View All	
Amendment Number	Amend Completion	Date Am	endment Type	Reason	Descrip	tion					
0000000000	08/14/2017 3:23PM	AC	TV								
Institution & Sponsor	Links Fund	ing Allocation	5	Milestone Notification	15		Protocols	Award	Attachment		Reports

7. Select the **Project** tab. Notice that this tab shows all of the projects associated with the Award/Contract. Also, all of the items that are marked in blue are links so that you are able to drill in further if needed.

ello, Casey Wood		You ha	ve 1 new items in your worklist.				Last Pro	cess Date/Time 09/03/2018 11	1:00:10
Searching & (Calculation Optio	n							
	Business Unit V	VA170	Award ID 000	000000000000000314	el-civics grant				
	Budget Period		Through						
	Date Selection A	s of Date							
	-	s of Date						(1-1 of 1 >)	Ħ
)etail	-	Activity	Description	Project Type	Status	Start Date	End Date	Facilities and Admin	M

- 8. Select the **Budget** tab. On the **Budget** tab you will find information on the **Budgeted** amount, **Expended** amount and the **Remaining Balance** for the award.
- 9. The **Total Expended** number is in blue, which indicates that it is a link used to drill down to the expenses.

llo, Casey Wood	Ybu it	ave 1 new items in your w	orkillet.			Last	Process Date/Time	09/03/20
Searching & Calculation	Option							
Business Ur Budget Perio Date Selectio		Award Throu	ID 0000000000	000000314	el-civics grant			
ponsor								
m, q						1-5 of 5	× + H	
Budget Item	Budgeted	Expended	Encumb	ered Pre-	Encumbered	Remaining Balance		
BENEFITS	319,0	00.00 22,	097.47	0.00	0.00		296,902.53	
300DS&SERVICES		0.00 6,	588.85	0.00	0.00		-0,588.85	
NTERFUND TRANS		0.00 4,	084.53	0.00	0.00		-4,084.53	
SALARY	925,0	00.00 64,	062.23	0.00	0.00		880,937.77	
JNKNOWN		0.00 11,	059.62	0.00	0.00		-11,059.62	
Total Dir Tota			7,892.70 0.00	0.00	0.00		8,107.30	
	als 1,290,2				0.00		12,357.30	
ost Share					14	1-1 of 1 V	b H	
Budget Item E	udgeted E	xpended	Encumbered	Pre-Encur	nbered Rem	aining Balance		
	0.00	0.00		0.00	0.00	-	0.00	
Total Dir	vect	0.00	0.00	0.00	0.00		0.00	
Tota	FA	0.00	0.00	0.00	0.00		0.00	
To Total Amount	als	0.00 0.00	0.00		0.00		0.00	
Budget	ed.	1,290,250	00		Expended	107,892.70		
Encumber		0.			cumbered	0.00		

Viewing Project Summary Data

Navigation: NavBar > Navigator > Grants > Grants Portal > Project Information > Project Summary

When you open this page it will be blank until you R**efresh** the page.

- 1. On the Project Summary page, select the **Refresh** button to display data.
- 2. On this page you will notice the **Project**, **Project Title**, **Award ID**, **Award Title**, **Start Date**, **End Date**, **Sponsor**, **Contact PI**, **Department** and **Grant Administrator**.
- 3. **Project**s may be selected or deselected and the total amount can be recalculated by selecting the **Update Total Amount** button.

Project	Summary							
	Casey Wood	You ha oriteria, click Set Search (we 1 new items in your worklist. Criteria. Set Search Crite	eria R	Last Process Date	/Time 09/03/20	18 11:00:17PM	
Finan	cial Calculating	Option 🕐				Burn	Rate Indicat	or
		Balances Both Period From Q te Selection As of Date	V Irrough	clude F <u>A</u> Q	Recalculate	•	Potential Unde Average Rate Potential Over	Spending
Detail					Personalize	Find 🖓 🛄	Summary	④ 1-498 of 498 ④ Last
Demog	raphies <u>Fina</u>	incial (TTT)						
	PC Bus Unit	Project	Project Title	Award ID	Award Title	Start Date	End Date	Sponsor (
2	WA170	0000001000	28NA 145 Perkins FVF AS	00000000000000000000000	Perkins CCS	07/01/2015	06/30/2018	State Board for Comm & Tech Colleges
2 ▪	WA170	0000001001	28NB 145 Perkins FVF BHIT	000000000000000000000000000000000000000	1Perkins CCS	07/01/2015	06/30/2018	State Board for Comm & Tech Colleges
2	WA170	0000001002	28NC 145 Perkins FVF HES	000000000000000000000000000000000000000	Perkins CCS	07/01/2015	06/30/2018	State Board for Comm & Tech Colleges
⊿ ▼	WA170	0000001003	28ND 145 Perkins FVF LRC	00000000000000000000	1Perkins CCS	07/01/2015	06/30/2018	State Board for Comm & Tech Colleges
			<					>
D	eselect All							
Total	Amount of Se	lected Items						
		Selected 498	Funded	308,491,393.40	Budgeted	254,991,393.40		
			Expended	84,267,699.52	Encumbered	295,475.43		
			Pre-Encumbered	136,037.09	Remaining Balance	170,292,181.36	U	pdate Total Amount
stitutio	n & Sponsor Lini	is Project Forecast	Project Variance	Project Attachment	Reports			

Viewing Project Detail Data

Navigation: NavBar > Navigator > Grants > Grants Portal > Project Information > Project Detail

- 1. Select the **Project Detail** tab on the **Project Detail** page.
- 2. Enter or look up the PC Business Unit.
- 3. Enter or look up the **Project**.
- 4. Select **Search** to view project details.

llo, Casey Wood	You have 1 new items in y	our worklist.		Last Process Date/Tir	me 09/03/20 11:00:10
earching Option					
PC Business Unit	WA170 Q	Projec	000001026	Q 3FW6 161 WF SF Work Study Search	
inancial Calculating Option 🕐					
Balances	Both		Include FA		
Budget Period From	Q,	Through	Q		
Date Selection	As of Date	~	…	Recalculate	
roject Title					
Award ID	0000000000000000000059		A	ward Title Workfirst	
Contact PI	Senf,Lora			Sponsor State Board for Comm & Tech Coll	leges
Department	Dean Bus,Ps,&Wkfc Ed			Start Date 07/01/2015	
Dept Contact				End Date 06/30/2018	
Project Type	66099			ect Status Open	
	-36.00		E	d Amount 78,038.00	

5. Select the **Demographics** tab to view **Professional Resources**, **Department Allocation** and **Certifications**.

Project Detail Der	mographics	Activities Qub	contracts Budget	Status						
Hello, Casey Wood		You have 1 new i	terns in your worklist.						Last Process Dat	e/Time 09/03/2018 11:00:10PM
Searching & Calculation	on Option									
PC Business	s Unit WA170	0		Proje	ct 0000001026	3FW	/6 161 WF SF Wo	rk Study		
Budget P	Period			Throug	gh					
Date Sele	ection As of D	Date								
Professional Resource										
m; Q					14	1-1 of 1	▶ 11			
Team Member	Name			Project Ro	sle	% Effort				
101001005	Roge	rs, Madison		PROJ_MA	NAGER					
Department Allocation										
m; Q					H	1-1 of 1 ~	$\mathbb{F} = \mathbb{H}$			
Department		Department ID	% Allocation							
Dean Bus, Ps, & With Ed		58704					100.00			
Certification										
頭 Q, (4 1-1 of 1 」 トート										
Certification Code India	cator	Certification Date		pproval ate	Name	Assurance Number	Exemption Number	Review Type	Comments	
		09/04/2018	00	0/04/2018						
Institution & Sponsor Links	Pr	oject Forecast	Project Variance		Project Atta	chment	Reports			

6. Select the **Activities** tab to view the activity for this Project. Select the blue links to drill down further in a particular area.

Project Detail	Demographics Acti	wities Subcontracts	Budget Status	1			
Hello, Casey Wood	,	You have 1 new items in your v	vorklist.			Last Process Date/Time	09/03/2018 11:00:10PM
Searching & Cal	culation Option						
PC	Business Unit WA170		F	Project 0000001026	3FW6 16	1 WF SF Work Study	
E	Budget Period		T	rough			
D	ate Selection As of Date						
Activities							
m; Q						1-1 of 1)el
3FW6	Description	Activity Type	Activity Status	Start Date	End Date	Facilities and Admin	
3FW6	3FW6 161 WF SF Work Study			07/01/2015	06/30/2018	Facilities and Admin	
Institution & Spons	or Links Project Fore	ecast Pro	ject Variance	Project Attach	ment	Reports	

7. Select the **Subcontracts** tab to determine if the Grant was designated as a subcontract.

Project Detail	Demographics	Activities	Subcontracts	Budget Status					
Hello, Casey Wood		You have 1	new items in your worklist				Las	t Process Date/Time	09/03/2018 11:00:10PM
Searching & Calcul	ation Option								
PC Busi	ness Unit WA170			Proje	ct 0000001026	3FW	/6 161 WF SF Wor	k Study	
Budg	et Period			Throug	ph				
Date	Selection As of Da	te							
Subcontract								1-1 of 1 🖂 🕨	ÞI
Subrecipient ID			Subcontract Type	Method Chosen	Start Date	End Date	Third Party Amo	ount	
Institution & Sponsor	Links Pro	ject Forecast	Project	Total Variance	Amount Project Atta	chment	Reports		

- 8. Select the **Budget Status** tab to view the budget for the project.
- 9. The blue links allow you to drill further into the Expended amount if needed.

ello, Casey Wood		new items in your worklist.			Last Process Date/Tir	me 09/03/2 11:00:1
PC Business Unit Budget Period Date Selection			Project (Through	000001028 3F	W6 161 WF SF Work Study	
onsor					i4 4 1-5 of 5 √	Þ H
udget Item	Budgeted	Expended	Encumbered	Pre-Encumbered	Remaining Balance	
ENEFITS	13,184.0	2,976.47	0.00	0.0	0 1	0,207.53
OODS&SERVICES	500.0	0 29.77	0.00	0.0	0	470.23
ALARY	63,726.0	44,129.78	0.00	0.0	0 1	9,598.22
DFTWARE	628.	627.66	0.00	0.0	0	0.34
NKNOWN	0.0	2,262.22	0.00	0.0	•	2,282.22
Total Direct	78,038.00	50,025.90	0.00	0.00	28,012.10	
Total FA Totals	0.00 78.038.00		0.00	0.00	0.00 28,012.10	
Overall Cost Share	10,000.01					
m Q					1-1 of 1	$\models=\models[$
Budget Item	Budgeted	Expended	Encumbered	Pre-Encumbered	Remaining Balance	
	0.00	0.00	0.00	0.0	0	0.00
Total Direct	0.	0.00	0.0	0 0.00	0.00	
Total FA	0.				0.00	
Totals	0.	0.0	0 0.0	0 0.00	0.00	
Budgeted		78,038.00		Expended	50.025.90	
Encumbered Remaining Balance	0.00 28,012.10		Pre-Encumbered		0.00	
Institution & Sponsor Links						

10. Process complete.