

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 Manager Access

The employees entered in the grid will be given access to all awards and projects that the PI/Project Manager entered in the Assigned By Employee ID has access to.

Search Criteria ?

Assigned By Employee ID Wood, Casey

Search

Employees Granted Portal Page Access ?

1-1 of 1 | View All

Empl ID	Name	Award Page	Project Page	Security Administrator	End Date	Date/Time of Query Creation	Last Update Date/Time	Last Update User ID
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		09/04/18 10:06:43.000000AM		

PI/Project Manager Division Award Project Employee

Save

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 Portal Security
PI/Project Manager Access

The employees entered in the grid will be given access to all awards and projects that the PI/Project Manager entered in the Assigned By Employee ID has access to.

Search Criteria ?

Assigned By Employee ID Wood, Casey

Search

Employees Granted Portal Page Access ?

1-2 of 2 | View All

Empl ID	Name	Award Page	Project Page	Security Administrator	End Date	Date/Time of Query Creation	Last Update Date/Time	Last Update User ID
<input type="text" value="101000000"/>	<input type="text" value="jico"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>	9:14:15.000000AM	09/04/18 9:14:46AM	CTC_KCLARK
101003109	Wood, Casey	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value=""/>	09/04/18 9:13:25.000000AM	09/04/18 9:14:56AM	CTC_KCLARK

PI/Project Manager Division Award Project Employee

Save

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.

The screenshot shows the top section of the 'Award Summary' page. It includes a header with 'Hello, Casey Wood' and 'You have 1 new items in your wishlist'. Below this, there's a search area with 'Set Search Criteria' and a 'Refresh' button (highlighted with a red box). To the right, 'Maximum Rows to Retrieve' is set to 50. The 'Financial Calculating Option' section has dropdowns for 'Balances' (Both), 'Budget Period From', 'Through', and 'Date Selection' (As of Date), along with an 'Include FA' checkbox and a 'Recalculate' button. On the right, the 'Burn Rate Indicator' shows 'Potential Under Spending', 'Average Rate Spending', and 'Potential Over Spending'.

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.

The screenshot shows the 'Award Summary' page with the 'Search Results' section. The 'Demographics' tab is selected (callout 2). The 'Maximum Rows to Retrieve' is set to 50 (callout 3). The search results table shows three rows of awards, with the first row selected (callout 5). The table columns include Award ID, Short Title, Primary Project, Project Title, Award Begin Date, Award End Date, Sponsor, and Reference Number. Below the table, there's a 'Total Amount of Selected Items' summary table with columns for Selected, Funded, Budgeted, Expended, Encumbered, Pre-Encumbered, Remaining Balance, Invoiced, Received, and Unpaid. The 'Update Total Amount' button is highlighted with a red box (callout 6). The page also shows pagination controls (1 of 4) and a 'Summary' link.

Award ID	Short Title	Primary Project	Project Title	Award Begin Date	Award End Date	Sponsor	Reference Number
00000000000000000002	College Spark Washington	Primary Project	Project Title	07/01/2011	06/30/2016	College Spark Washington	
00000000000000000003	GSI STEM Research	0000001077	GSI STEM	03/01/2015	08/30/2016	Greater Spokane Incorporated	
00000000000000000004	Washington STEM	0000001078	Washington STEM	07/05/2011	07/04/2016	Washington STEM	Washington

Total Amount of Selected Items	
Selected	50
Funded	15,708,496.36
Budgeted	15,708,496.36
Expended	10,094,818.23
Encumbered	29,532.82
Pre-Encumbered	6,316.00
Remaining Balance	5,577,829.31
Invoiced	1,500,304.08
Received	1,442,173.95
Unpaid	58,130.13

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

Award Summary

Hello, Casey Wood You have 1 new item in your wishlist. Last Process Date/Time 09/03/2018 11:00:10PM

To change your search criteria, click Set Search Criteria. [Set Search Criteria](#) [Refresh](#) Maximum Rows to Retrieve 50

Financial Calculating Option ?

Balances Both ☐ Include FA

Budget Period From Through Date Selection As of Date [Recalculate](#)

Burn Rate Indicator

- Potential Under Spending
- Average Rate Spending
- Potential Over Spending

Search Results

1 of 4

Detail Personalize | Find | View All | Summary 1-3 of 50 Last

Demographics **Financial** Compliance

	Award ID	Funded	Budgeted	Expended	Encumbered	Pre Encumbered	Remaining Balance	Invoiced	Received	Unpaid	Burn Rate	Grant Admin
<input checked="" type="checkbox"/>	00000000000000000002	6,582.08	6,582.08	375.20	0.00	0.00	6,206.88	0.00	0.00	0.00	-94.00	Grant Admin
<input checked="" type="checkbox"/>	00000000000000000003	6,630.00	6,630.00	0.00	0.00	0.00	6,630.00	0.00	0.00	0.00	-100.00	Grant Admin
<input checked="" type="checkbox"/>	00000000000000000004	3,904.11	3,904.11	0.00	0.00	0.00	3,904.11	0.00	0.00	0.00	-100.00	Grant Admin

[Deselect All](#) **Total Amount of Selected 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](#)

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.

Award Summary

Hello, Casey Wood You have 1 new item in your wishlist. Last Process Date/Time 09/03/2018 11:00:10PM

To change your search criteria, click Set Search Criteria. [Set Search Criteria](#) [Refresh](#) Maximum Rows to Retrieve 50

Financial Calculating Option ?

Balances Both ☐ Include FA

Budget Period From Through Date Selection As of Date [Recalculate](#)


Burn Rate Indicator

- Potential Under Spending
- Average Rate Spending
- Potential Over Spending

Search Results

1 of 4

Detail Personalize | Find | View All | Summary 1-3 of 50 Last

Demographics Financial **Compliance** 

	Award ID	Human Protocol	Animal Protocol
<input checked="" type="checkbox"/>	00000000000000000002	N	N
<input checked="" type="checkbox"/>	00000000000000000003	N	N
<input checked="" type="checkbox"/>	00000000000000000004	N	N

[Deselect All](#) **Total Amount of Selected 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](#)

[Institution & Sponsor Links](#)

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

The screenshot shows the 'Award Summary' page with search criteria and a table of results. A red arrow points from the 'Department' column header in the first table to the 'Department' cell in the first row of the expanded table below.

Award ID	Short Title	Primary Project	Project Title	Award Begin Date	Award End Date	Sponsor	Reference Award Number	Federal Award Identification Number	Award Type	Purpose	Award PI	Award Status	Department
00000000000000000002	College Spark Washington	Primary Project	Project Title	07/01/2011	06/30/2016	College Spark Washington			Grant	SERVC	Madras,Anthony	Accepted	Institutional Resrch
00000000000000000003	GSI STEM Research	0000001977	GSI STEM	03/01/2015	06/30/2016	Greater Spokane Incorporated			Grant		Madras,Anthony	Accepted	Chancellor/Ceo
00000000000000000004	Washington STEM	0000001978	Washington STEM	07/05/2011	07/04/2016	Washington STEM	Washington STEM		Grant		Madras,Anthony	Accepted	Institutional Resrch

Total Amount of Selected Items													
Selected	50	Expended	19,094,818.23	Inviced	1,500,304.08								
Funded	15,708,496.36	Encumbered	28,532.83	Received	1,442,173.95								
Budgeted	15,708,496.36	Pre-Encumbered	1,316.00	Unpaid	58,130.13								
		Remaining Balance	5,577,829.31										

Department	Funded	Budgeted	Expended	Encumbered	Pre-Encumbered	Remaining Balance	Inviced	Received	Unpaid	Burn Rate	Grant Administrator	Human Protocol	Animal Protocol
Institutional Resrch	6,582.08	6,582.08	375.20	0.00	0.00	6,206.88	0.00	0.00	0.00	-94.00	Grant Administrator	N	N
Chancellor/Ceo	6,630.00	6,630.00	0.00	0.00	0.00	6,630.00	0.00	0.00	0.00	-100.00	Grant Administrator	N	N
Institutional Resrch	3,904.11	3,904.11	0.00	0.00	0.00	3,904.11	0.00	0.00	0.00	-100.00	Grant Administrator	N	N

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**.

Award Detail

Demographic

Project

Budget Status

Hello, Casey Wood

You have 1 new items in your worklist.

Last Process Date/Time 09/03/2018 11:00:10PM

Searching Option

Business Unit WA170

Award ID 00000000000000000314

el-civics grant

Search

Financial Calculating Option

Balances Both

Budget Period From

Through

Date Selection As of Date

Include FA

Recalculate

Award Title

Contact PI Ames, Linda Dianne

Department El Civics 2008-2009

Award Status Accepted

Award Type Grant

Purpose

Burn Rate 8.00

Total Funded Amount 1,290,250.00

Sponsor State Board for Comm & Tech Colleges

Ref Awd # 117-leic-18

Federal Awd ID#

Grant Administrator Grant Administrator

Begin Date 07/01/2016

End Date 06/30/2027

Institution & Sponsor Links

Funding Allocations

Milestone Notifications

Protocols

Award Attachment

Reports

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 Status

Hello, Casey Wood

You have 1 new items in your worklist.

Last Process Date/Time 09/03/2018 11:00:10PM

Searching & Calculation Option

Business Unit WA170

Award ID 00000000000000000314

el-civics grant

Budget Period

Through

Date Selection As of Date

Administrative

Previous Contract

Billing Term

PO:

Professional Resource

PC Business Unit

Project

Team Member

Name

Project Role

Description

% Effort

WA170	0000001938	101001622	Tucker, Flynn	PI	Principle Investigator	
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Terms and Condition

PC Business Unit

Terms & Conditions

Description

Explanation

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Attributes

Attribute Value

Comments

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Amendments

Amendment Number

Amend Completion Date

Amendment Type

Reason

Description

0000000000	09/14/2017 3:23PM	ACTV		
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Institution & Sponsor Links

Funding Allocations

Milestone Notifications

Protocols

Award Attachment

Reports

- Award Detail
Demographic
Project
Budget Status

Hello, Casey Wood
You have 1 new items in your wishlist.
Last Process Date/Time 09/03/2018 11:00:10PM

Searching & Calculation Option

Business Unit

WA170

Award ID

000000000000000000314

el-civics grant

Budget Period

Through

Date Selection

As of Date
- Detail

Q

1-1 of 1

PC Business Unit	Project	Activity	Description	Project Type	Status	Start Date	End Date	Facilities and Admin
WA170	0000001938	CIVICS	el-civics grant	Dept of Education-Fed	Open	07/01/2018	08/30/2027	Facilities and Admin

Institution & Sponsor Links
Funding Allocations
Milestone Notifications
Protocols
Award Attachment
Reports

- Award Detail
Demographic
Project
Budget Status

Hello, Casey Wood
You have 1 new item in your worksheet.
Last Process Date/Time 08/03/2018 11:00:10PM

Searching & Calculation Option

Business Unit

WA170

Award ID

000000000000000000314

el-civica grant

Budget Period

Through

Date Selection

As of Date

Sponsor

Q

1-5 of 5

Budget Item	Budgeted	Expended	Encumbered	Pre-Encumbered	Remaining Balance
BENEFITS	319,000.00	22,097.47	0.00	0.00	296,902.53
GOODS&SERVICES	0.00	8,588.85	0.00	0.00	-8,588.85
INTERFUND TRANS	0.00	4,084.53	0.00	0.00	-4,084.53
SALARY	925,000.00	84,062.23	0.00	0.00	840,937.77
UNKNOWN	0.00	11,059.62	0.00	0.00	-11,059.62
Total Direct	1,244,000.00	107,892.70	0.00	0.00	1,136,107.30
Total Fik	48,250.00	0.00	0.00	0.00	48,250.00
Totals	1,290,250.00	107,892.70	0.00	0.00	1,182,357.30

Cost Share

Q

1-1 of 1

Budget Item	Budgeted	Expended	Encumbered	Pre-Encumbered	Remaining Balance
	0.00	0.00	0.00	0.00	0.00
Total Direct	0.00	0.00	0.00	0.00	0.00
Total Fik	0.00	0.00	0.00	0.00	0.00
Totals	0.00	0.00	0.00	0.00	0.00

Total Amount

Budgeted	1,290,250.00	Expended	107,892.70
Encumbered	0.00	Pre-Encumbered	0.00
Remaining Balance	1,182,357.30		

[Institution & Sponsor Links](#)
[Funding Allocations](#)
[Milestone Notifications](#)
[Protocols](#)
[Award Attachment](#)
[Reports](#)

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 **Refresh** 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. **Projects** may be selected or deselected and the total amount can be recalculated by selecting the **Update Total Amount** button.

[illegible]

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.

Project DetailDemographicsActivitiesSubcontractsBudget Status

Hello, Casey Wood
You have 1 new items in your wishlist.
Last Process Date/Time 09/03/2018 11:00:10PM

Searching Option

PC Business UnitWA170

Project0000001026

3FW5 161 WF SF Work Study

Search

Financial Calculating Option

BalancesBoth
Budget Period From
Through
Date SelectionAs of Date

☒ Include FA

Recalculate

Project Title

Award ID00000000000000000059
Award TitleWorkfirst
Contact PISenf,Lora
SponsorState Board for Comm & Tech Colleges
DepartmentDean Bus,Ps,&Wkfc Ed
Start Date07/01/2015
Dept Contact
End Date06/30/2018
Project Type66099
Project StatusOpen
Burn Rate-36.00
Funded Amount78,038.00

Institution & Sponsor Links
Project Forecast
Project Variance
Project Attachment
Reports

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

Project DetailDemographicsActivitiesSubcontractsBudget Status

Hello, Casey Wood
You have 1 new items in your wishlist.
Last Process Date/Time 09/03/2018 11:00:10PM

Searching & Calculation Option

PC Business UnitWA170

Project0000001026

3FW5 161 WF SF Work Study

Professional Resource

1-1 of 1

Team Member	Name	Project Role	% Effort
101001005	Rogers, Madison	PROJ_MANAGER	

Department Allocation

1-1 of 1

Department	Department ID	% Allocation
Dean Bus,Ps,&Wkfc Ed	58794	100.00

Certification

1-1 of 1

Certification Code	Indicator	Certification Date	Expiration Dt	Approval Date	Name	Assurance Number	Exemption Number	Review Type	Comments
		09/04/2018		09/04/2018					

Institution & Sponsor Links
Project Forecast
Project Variance
Project Attachment
Reports

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

