

# PI Sponsored Project Review – Summary Description and Navigation

Nov. 2008

The PI Sponsored Project Review application is designed to provide Principal Investigators with valuable project management information directly from the Institute’s accounting system as they review and verify expenses. The system is accessible through Web Grants Management (Web PEB). In addition, PIs will receive reminder emails which include a link to the application.

Once the system is accessed, the primary screen displays information associated with the projects for which the PI is responsible. After reviewing the summary information, it is possible to click on a specific project to retrieve more details and analyze the specific charges.

After completing the review process, the PI will simply click the checkboxes for all projects that have been reviewed, and then click the “Save” button to record his/her review. If there are any expenses that are not appropriate for the individual sponsored project(s), the PI should take action through their unit business office to ensure that proper corrections are made through the accounting system.

Please note that the projects listed include only externally-funded sponsored projects; projects funded by the Georgia Tech Foundation and Georgia Tech Research Corporation are not included.

## **Basic Navigation and Process Steps:**

### **1. Click on the hyperlink to launch the application.**

[https://gtwebapps.gatech.edu/cfprod/grantsys/grants\\_login.cfm](https://gtwebapps.gatech.edu/cfprod/grantsys/grants_login.cfm)

### **2. Login using GTID and GT account password. (Same as Techworks)**

The screenshot shows the login interface for the Georgia Institute of Technology's WEB Grants Management system. At the top, a navigation bar contains links for HRMS, Grants, Procurement, SPD, GL, and gtID#. The main content area features the Georgia Institute of Technology logo and the title "WEB Grants Management". Below the title are input fields for "Login:" and "Password:", followed by "Login" and "Clear" buttons. A disclaimer states: "By logging into this application, I agree to adhere to the GT Data Access Policy (DAP) and Computer and Network Usage and Security Policy (CNUSP) as well as all other GT policies governing the appropriate use of Institute Resources." A "Login" button is located below the disclaimer. At the bottom, a footer provides contact information: "If you have any questions or comments about this site, please email [gc.ask@business.gatech.edu](mailto:gc.ask@business.gatech.edu)".

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## 3. Choose the “PI Sponsored Project Review” link from the Web Grants Management menu.

Grants System Menu      Date/Time: 11/11/2008 04:12:56 PM      Database: Test      User ID: KT80

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**WEB Grants Management**

<a href="#">Project Expense and Budget Report (Enhanced)</a>
<a href="#">Project Status Report</a>
<a href="#">Invoice History by Award/Fund</a>
<a href="#">90 Days to Expiration Date</a>
<a href="#">Past Term Report</a>
<a href="#">PDPI Lookup</a>
<a href="#">PI Sponsored Project Review (NEW)</a>

[Logout](#)

If you have any questions or comments about this site, please email [gc.ask@business.gatech.edu](mailto:gc.ask@business.gatech.edu)

## 4. Choose a period to review.

PI Sponsored Project Review      Date/Time: 10/24/2008 09:48:20 AM      Database: Test      User ID: JCOCHRAN6

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Sponsored Project Review of Expenditures by Principal Investigator Search Criteria

Review FiscalYear/Period Date Ranges  

[Grants Menu](#)      [Logout](#)

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## 5. Click on a project to review transactions for the period.

PI Sponsored Project Review      Date/Time: 10/30/2008 09:00:57 AM      Database: Test      User ID: JCOCHRAN6

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### Sponsored Project Review of Expenditures by Principal Investigator

PI Name	James Donald Cochran Jr.	<input type="button" value="View all transactions for period"/>	
Home Department	Grants & Contracts Accounting		
From Date	08/01/2008	To Date	08/31/2008

Project Listing (includes externally-funded sponsored projects only)

Review (check box to save)	Project ID	Award/Fund	Sponsor Name	Project Title	Direct Expenditures
<input checked="" type="checkbox"/>	<a href="#">21066S1</a>	R6985	SOUTHWEST RESEARCH INSTITUTE/	LABORATORY MEASUREMENTS OF THE MICROWAVE OPACITY OF AMMONIA AND WATER VAPOR	\$10,648.79
<input checked="" type="checkbox"/>	<a href="#">21066ZL</a>	R7104	NASA/GODDARD SPACE FLT CTR/MD	LABORATORY EVALUATION AND APPLICATION OF MICROWAVE ABSORPTION PROPERTIES ..	\$1,372.62

Projects previously reviewed and saved for this period

Reviewed	Project ID	Award/Fund	Sponsor Name	Project Title	Direct Expenditures
NONE					

#### Instructions and Responsibilities:

It is the responsibility of Principal Investigators (and their designated Delegates with firsthand knowledge of the work performed) to ensure that only allowable and allocable charges are posted as direct expenses to sponsored projects. Please review the information provided for each project. If there are any expenses that are not appropriate for the individual sponsored project(s), take action through your unit's business office to ensure that proper corrections are made.

Please click the "Save" button to record your review and to view the current status of the above projects:

[Grants Menu](#)

[Return to Project Expenditure Review by PI Search Criteria](#)

[Logout](#)

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- Example: Project 21066S1 selected for review

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## 6. Review the direct expenditures.

- The Project Details for Project 21066S1 now displayed.....

PI Sponsored Project Review - Project Details										
Date/Time: 10/30/2008 08:21:11 AM Database: Test User ID: JCOCHRAN6										
GEORGIA Institute of TECHNOLOGY										
Project Details										
Actual Expenditures 08/01/2008 to 08/31/2008										
<a href="#">Download transactions to Excel</a>										
Project Detail Transactions										
ProjectId	Award Fund	Transaction Date	Account	Account Description	Sponsored Category	Transaction Description	Campus Ref	Employee Name	Pay End Date	Expense
<a href="#">21066S1</a>	<a href="#">R6985</a>	08/04/2008	714150	Supplies & Mat - Pcard Purch	Materials and Supplies	MCMASTER-CARR	CARVER			(\$66.90)
<a href="#">21066S1</a>	<a href="#">R6985</a>	08/13/2008	715800	Repairs & Maint (Facilities)	Materials and Supplies	Facilities Charges	210LH3528I			\$393.47
<a href="#">21066S1</a>	<a href="#">R6985</a>	08/18/2008	714150	Supplies & Mat - Pcard Purch	Materials and Supplies	AAS	VSJA2C9COE			\$135.00
<a href="#">21066S1</a>	<a href="#">R6985</a>	08/22/2008	511100	Salaries-Reg Faculty w/Benefit	Salaries and Wages	Payroll Postings			08/31/2008	\$4,588.65
<a href="#">21066S1</a>	<a href="#">R6985</a>	08/22/2008	511430	Salaries-GRA/GTA	Salaries and Wages	Payroll Postings			08/31/2008	\$1,928.52
<a href="#">21066S1</a>	<a href="#">R6985</a>	08/22/2008	520240	Fringe Benfts Flat Rate(2) Spon	Fringe Benefits	Payroll Postings			08/31/2008	\$1,147.16
<a href="#">21066S1</a>	<a href="#">R6985</a>	08/22/2008	787000	In State Matriculation	Tuition Remission	Payroll Postings			08/31/2008	\$609.31
<a href="#">21066S1</a>	<a href="#">R6985</a>	08/28/2008	714150	Supplies & Mat - Pcard Purch	Materials and Supplies	OMEGA ENGINEERING	PS082008			(\$1,247.00)
<a href="#">21066S1</a>	<a href="#">R6985</a>	08/28/2008	714150	Supplies & Mat - Pcard Purch	Materials and Supplies	OMEGA ENGINEERING	PS082008			\$1,247.00

*Note: You may choose to download this information to MS Excel using the link on the report OR click on the Project ID or Award/Fund link to see additional award or project information using the Project Expense and Budget (PEB) Report.*

## 7. Return to the PI Review application to record that you have reviewed any or all of your projects. Simply verify the selected checkboxes are marked for those you would like to record as reviewed and press the Save button.

Project Listing (includes externally-funded sponsored projects only)

Review (check box to save)	Project ID	Award/Fund	Sponsor Name	Project Title	Direct Expenditures
<input checked="" type="checkbox"/>	<a href="#">21066S1</a>	R6985	SOUTHWEST RESEARCH INSTITUTE/	LABORATORY MEASUREMENTS OF THE MICROWAVE OPACITY OF AMMONIA AND WATER VAPOR	\$10,648.79
<input type="checkbox"/>	<a href="#">21066ZL</a>	R7104	NASA/GODDARD SPACE FLT CTR/MD	LABORATORY EVALUATION AND APPLICATION OF MICROWAVE ABSORPTION PROPERTIES ..	\$1,372.62

Projects previously reviewed and saved for this period

Reviewed	Project ID	Award/Fund	Sponsor Name	Project Title	Direct Expenditures
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NONE

### Instructions and Responsibilities:

It is the responsibility of Principal Investigators (and their designated Delegates with firsthand knowledge of the work performed) to ensure that only allowable and allocable charges are posted as direct expenses to sponsored projects. Please review the information provided for each project. If there are any expenses that are not appropriate for the individual sponsored project(s), take action through your unit's business office to ensure that proper corrections are made.

Please click the "Save" button to record your review and to view the current status of the above projects:



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8. Your review is now recorded for those projects selected. Also, notice that certain project status information is now conveniently displayed.

**PI Review Recorded**      Date/Time: 10/30/2008 09:03:58 AM    Database: Test    User ID: JCOCHRAN6

**GEORGIA Institute of TECHNOLOGY**  
**PI Review Recorded**

James Donald Cochran Jr. has reviewed and saved the following projects for the review period ending 08/31/2008:

Project	Project End Date	Remaining Balance as of (Today)
21066S1	09/30/2011	(\$48,276.47)

The following projects have not been marked and reviewed for the review period ending 08/31/2008:

Project	Project End Date	Remaining Balance as of (Today)
21066ZL	09/14/2009	\$84,674.69

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- Example: Based on current accounting system information, Project 21066S1 has incurred expenses and outstanding encumbrances in excess of the budgeted award amount. This cost overrun must be cleared if additional funds are not received.

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## Resources, Training, Contacts

For more details on how to access and utilize this application, go to [https://techworks.psauth.gatech.edu/gt\\_data/content/Web\\_Grants\\_Management\\_Tools.swf](https://techworks.psauth.gatech.edu/gt_data/content/Web_Grants_Management_Tools.swf)

If you have any questions or comments regarding “PI Sponsored Project Review”, please send an email to [pireview@business.gatech.edu](mailto:pireview@business.gatech.edu).

New features and reports have recently been added to the Web Grants Management system. A separate “Web Grants Management-Summary of Enhancements and Additions” document and on-line training presentation is available that summarizes the new features and reports that are now available.

If you have any questions regarding the Web Grants Management system, please send an email to [gc.ask@business.gatech.edu](mailto:gc.ask@business.gatech.edu). For a listing of available Grants Management Training sessions and links to Grants Management system manuals, please refer to the Grants and Contracts Accounting web-site at [www.grants.gatech.edu](http://www.grants.gatech.edu).