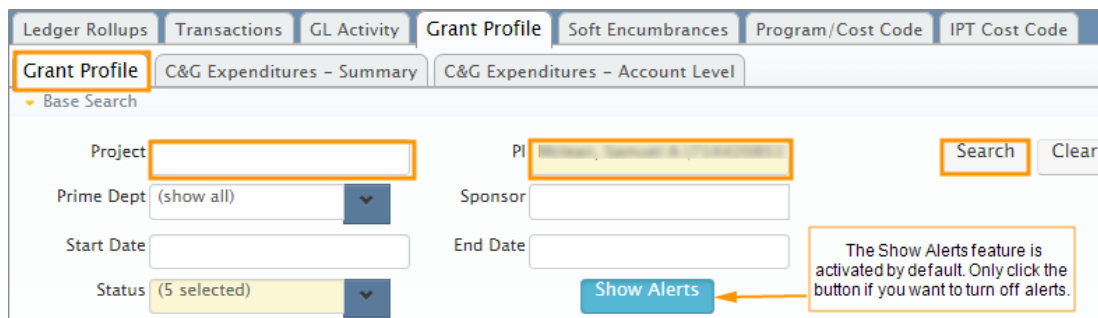


Monitor Your Grant's Burn Rate and Other Alerts

Keep tabs on your projects' burn rates, end dates, and fund depletion by checking alerts on InfoPorte's Grant Profile tab:

1. Navigate to **Finance > Dept Acctg > Grant Profile**.
2. Enter your Project, PI or other filters, and click **Search**.



3. In the search results, look at the end of the row for each grant to see any alerts.

Balance (Direct only)	Balance	Alerts
2,189.66	3,965.12	
18,741.35	28,487.62	
0.23	0.23	

Alert Icon Legend

Alerts are triggered off these two date fields on a project:

- **PT** – The Project End Date is the last day allowable charges should be entered against a project. Charges entered after this date may require a cost transfer. **Source:** The Project End Date field on the Project Details page in InfoPorte, on the Grant Details tab.

- **BY** – The KK End Date provides a 75-day window after the Project End Date for charges to be processed. The original transaction should have been incurred on or before the Project End Date. Non-personnel transactions must pass budget checking by this date, or you will receive a Budget Date Out of Bounds error. **Source:** The KK End Date field on the Project Details page in InfoPorte, on the Grant Details tab.

Label	Meaning
Expires in 30 Days - Project End Date	The project is close to reaching the end of its Project End Date or KK End Date. Alerts show 30 days, 60 days, 90 days and 120 days prior to expiration.
Expires in 30 Days - KK End Date	
Depleted	The project funds are exhausted.
Burn Rate Too Slow	The "ideal" burn rate is one that brings a grant balance to zero exactly when its project year expires. The ideal rate, or average daily spend, is calculated by taking a project budget amount and dividing it by project days. If the actual burn rate is 30% higher or lower than the ideal, an alert displays.
Burn Rate Too High	

Do a Quick Balance and End Date Check for All Your Projects

InfoPorte's Grants Profile tab gives you a summary view of all your projects on one screen. You can spot check available life-to-date budget balances, end dates and other key information.

IMPORTANT – Balances on the Grant Profile, Grant Detail and PI Dashboard pages don't include salary projections. To see personnel encumbrances with your grant balances, use the OSR Ledger Rollup page and check Yes in the Show Projections filter.

1. Navigate to **Finance > Dept Acctg > Grant Profile**.
2. Enter your name in the PI field, and click **Search**.
3. Review the balances and end dates of all your projects.

Note: InfoPorte data is at least one business day behind ConnectCarolina.

Start Date	End Date	Status	Budget	Actuals (Direct)	Actuals (Indirect)	MTD Actuals	Encumb	Pre-encumb	Balance (Direct only)	Balance
10/6/2010	5/31/2013	O - Open	76,809.68	60,010.63	16,799.05	0.00	0.00	0.00	0.00	0.00
12/16/2011	12/15/2012	O - Open	83,802.60	103,888.00	17,522.15	0.00	0.00	0.00	-37,607.55	-37,607.55
4/17/2013	4/16/2016	O - Open	68,168.76	53,983.65	19,162.61	0.00	0.00	0.00	14,185.11	-4,977.50

Finding Budget Balances with or without Cost Share

Check your project's available life-to-date budget balance with or without cost share on the OSR Ledger Rollup in InfoPorte.

1. Navigate to **Finance > Dept Accounting > Ledger Rollups > OSR Ledger**.
2. In the search fields, do one of the following:
 - To look up your balance with cost share: Enter the Project ID only.

- To look up your balance without cost share: Enter the Project ID and Source for the sponsor funds. **EXAMPLE:**

Project: 5033746 Source: 49000

3. Click **Search**.

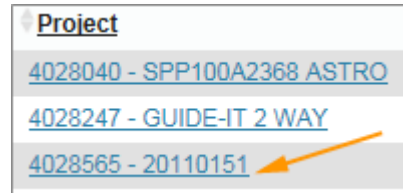
	Budget	Pre-Encumbered	Encumbered	Actuals LTD	Available Balance	Actuals YTD	Actuals MTD
Grand Total	51,940.00	0.00	0.00	54,155.10	-2,215.10	6,975.81	2,202.72
Cost Share Total	0.00	0.00	0.00	730.11	-730.11	73.29	0.00

These results show Cost Share. The search filter was the Project ID only.

Look up Details about Your Grant

Look up all the details of a project on the Grant Details tab in InfoPorte, including the F&A percentage, invoice frequency, Milestones, and OSR Financial Reporter.

1. Navigate to **Finance > Dept Acctg > Grant Profile**.
2. Enter the project or PI name, and click **Search**.
3. In the search results, click the link on the left with the grant you want to see.



Result: InfoPorte displays the Grant Detail tab.

4. Review the details of your grant.

Note: The top portion of the screen is shown below.

Grant Profile
Grant Details

Return to List

Project Details

Project ID 4028565	Project Start Date 4/17/2013	Project End Date 4/16/2016
Project Description 20110151	KK Begin Date 4/17/2013	KK End Date 6/30/2016
Project Type IND - Industry	Processing Status O - Open	Child OPTN 2 - Track w/o Budget
Prime Award Department 414801 - Heart Vascular		
Rebudgetary Allowability (001) No budgetary restrictions	Prime/Sub Indicator Prime	Prime Account Number 4028565
Invoice Frequency (05) Other	Prime Project Start Date 4/17/2013	Prime Project End Date 4/16/2016
OSR Post-Award Administrator Being Utilized (704264869)	OSR Financial Reporter 0	Original Proposal 13-4212