

## 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.

1. Navigate to **Finance > Dept Acctg > Grants > 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.

Project End Date	Status	Balance (Direct only)	Balance
3/31/2018	O - Open	74,396.91	110,599.57
11/30/2016	O - Open	-4,852.01	-4,852.01
5/31/2012	O - Open	0.00	0.00
5/16/2010	O - Open	0.00	0.00
3/4/2008	O - Open	0.00	0.00
9/1/2008	O - Open	0.00	0.00
4/19/2012	O - Open	0.00	0.00

## 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 tab in InfoPorte.

1. Navigate to **Finance > Dept Acctg > 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**.

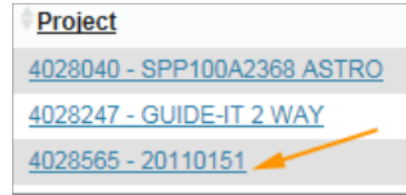
These results show Cost Share. The search filter was the Project ID only.

	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

## 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 > Grants > Grants 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.

Project: 5033746 Source: 49000

4. Review the details of your grant.

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

Grant Profile		Grant Details	
<b>Project Details</b>			
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	Angy Gifford (704264869)	OSR Financial Reporter	0
		Original Proposal	13-4212