

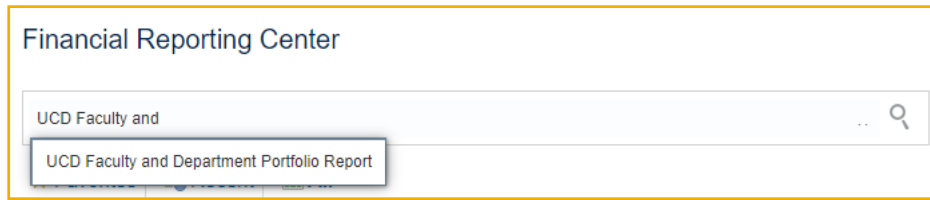
PPM TASK: RUNNING THE FACULTY PORTFOLIO REPORT FOR ACADEMICS

Use this help guide to run the Faculty and Department Portfolio Report for PPM Projects in Oracle

NAVIGATION:

Oracle Home Page > Financial Reporting Center >

Step	Action
1.	When you navigate to the Financial Reporting Center , type UCD Faculty and Department Portfolio Report in the Search Parameters box.



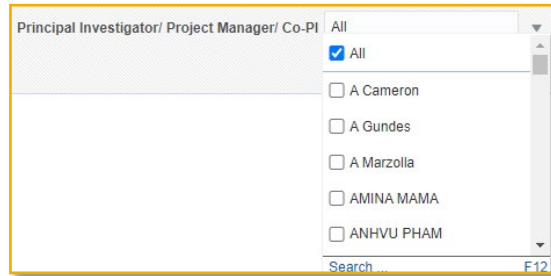
Step	Action
2.	Make sure you have selected the All button to search all reports.



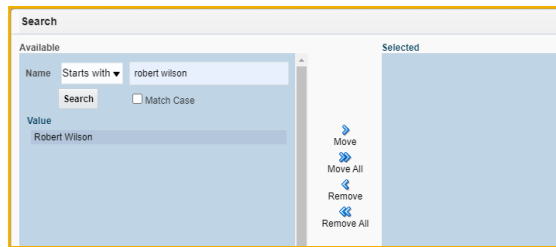
Step	Action
3.	Select the UCD Faculty and Department Portfolio Report link in the search results.



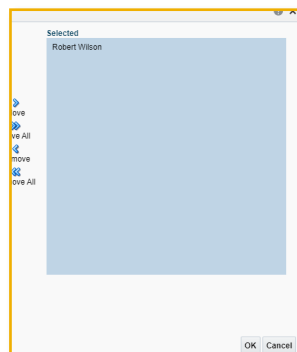
Step	Action
4.	In the search field for Principal Investigator/Project Manager/Co-PI , select the drop-down arrow to reveal the search window and select Search .



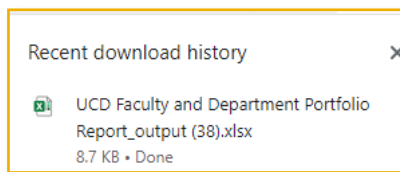
Step	Action
5.	In the Search Sub Menu type the First and Last Name of the person and select Search to see a list of results.
6.	Select the name of the PI in the Value box and select Move to move the name to the Selected box.



Step	Action
7.	Once the PI name is in the Selected box press OK .



Step	Action
8.	You can filter by additional criteria such as Project Owning Organization, Project Status and Award Status by searching for those values.
9.	When all criteria are selected, click on the Apply button. The results will export to an Excel Spreadsheet.



Step	Action
10.	Open the Excel spreadsheet to view a Summary report on the summary tab and a Detailed report on the Detail tab.
11.	Summary Report – The summary report includes data for sponsored award projects and internal projects. The report will include budget, expenditures, encumbrances and ending balance by Task number
12.	Detailed Report – The detailed report is on the Detail Tab includes data for sponsored award projects and internal projects. The report will include budget, expenditures, encumbrances and ending balance by Task and Expenditure Category .
13.	End of Procedure.

Project Name	Project Number	Project Owning Organization	Project Type	Task/Subtask Name	Task/Subtask Number	Project Manager	Project Principal Investigator	Project Co-Principal Investigator
Robert G Wilson SISKIYOU PPM ONLY	FPSISK6234	9923254 - UCCE Siskiyou County	Internal	LIVESTOCK AND RANGE MANAGEMENT GIFT 43766	GFT001		Robert Wilson	
Robert G Wilson SISKIYOU PPM ONLY	FPSISK6234	9923254 - UCCE Siskiyou County	Internal	GIFT VEG AND ROW CROPS 54718	GFT002		Robert Wilson	
Robert G Wilson SISKIYOU PPM ONLY	FPSISK6234	9923254 - UCCE Siskiyou County	Internal	ACADEMIC COST RECOVERY FY2324	ACR024		Robert Wilson	
Robert G Wilson SISKIYOU PPM ONLY	FPSISK6234	9923254 - UCCE Siskiyou County	Internal	RESEARCH AND EDUCATION	RED001		Robert Wilson	