Overview of Changes

This document provides a detailed description of the following changes to the Project/Grant Reports in M-Reports. These changes are effective June 3, 2013. These changes are part of a larger effort to improve the ease-of-use and integration of the tools in the Real Time Financials Toolkit, including M-Reports. Additional updates to the eReconciliation tools in M-Pathways – another RTF tool – are planned for June 30th, 2013.

Details

**New % Expended Information**

A  The Project/Grant Budget Status Report now includes a % Expended column, which indicates the percentage of expended funds in comparison to the amount budgeted. Values that are greater than 100% are displayed in red.

<table>
<thead>
<tr>
<th>Budget Category</th>
<th>Budget</th>
<th>Expended</th>
<th>Official Balance as of last month closed Jun 2012</th>
<th>% Expended</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research Salaries</td>
<td>$273,726</td>
<td>$214,985</td>
<td>$58,830</td>
<td>81.26%</td>
</tr>
<tr>
<td>Adm. Salaries (A-21 Monitored)</td>
<td>$51</td>
<td>$50</td>
<td>$1</td>
<td>98.04%</td>
</tr>
<tr>
<td>Clerical Sal. (A-21 Monitored)</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>No Budget</td>
</tr>
<tr>
<td>Fringe Benefits</td>
<td>$23,726</td>
<td>$21,987</td>
<td>$1</td>
<td>96.01%</td>
</tr>
</tbody>
</table>

**New Ability to Grant Secondary/Proxy Access to a Project/Grant (Primary Investigators only)**

B  Primary investigators can now assign secondary or proxy access to a project/grant. Click on the person icon, under Manage Access on the Summary of Sponsored Projects list, to assign secondary access to another researcher or member of your unit. See [Grant Secondary/Proxy Access to a Project/Grant Step-by-Step](#) for detailed instructions.

**Alternative Title Now Available for Project/Grants**

C  The Summary of Projects and the Project/Grant Budget Status Report (PBSR) now include an Alternative Title which is any “nick name” commonly used to refer to a project/grant. Anyone who has access to a project/grant can add an Alternative Title on the Project/Grant Information page.
Addition of Shortcode to Summary Information for a Project/Grant

The report now includes the shortcode related to the Project/Grant in the header information on the Project/Grant Budget Status Report (PBSR) and the P/G Information report.

New % Effort and % Distribution Report for Sponsored Projects

% Effort and % Distribution information is now included at the bottom of the Project/Grant Budget Status Report (PBSR) and in the Summary of Project/Grants Report. Use this information to see the current percentage of effort for each employee assigned to a project/grant. Click the symbol next to the Shortcode number to show additional details. Click the linked Shortcode number to see the complete Chartfield string. Effort information for all your project/grants, both Sponsored and UM-Funded/Gifts/Other, can be displayed on the Summary of Projects page by clicking Show Effort for all Projects.

Additional Assistance

Questions, feedback, and requests for enhancements can be submitted to the ITS Information and Technology Services Help Desk:

M-F, 7 a.m.-6 p.m. (phone and email); Sun, 1-5 p.m. (email)

- Submit a Service Request Online: http://its.umich.edu/help/request
- 734-764-HELP (764-4357)
- 4HELP@umich.edu
- http://its.umich.edu/help