**UNIVERSITY OF CALIFORNIA**
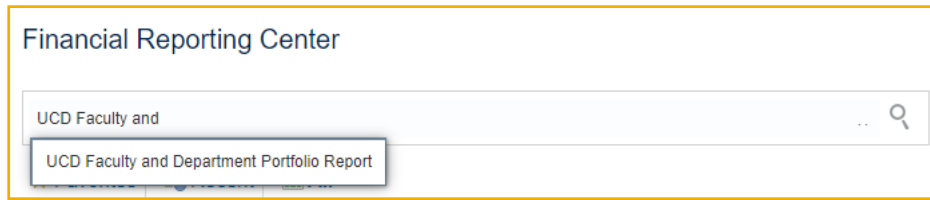**Agriculture and Natural Resources**

## 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 >

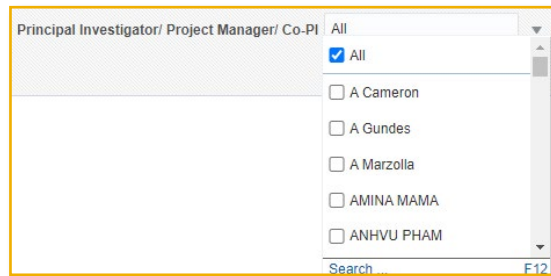| Step | Action |
|---|---|
| **1.** | When you navigate to the **Financial Reporting Center**, type **UCD Faculty and Department Portfolio Report** in the **Search Parameters** box. |



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



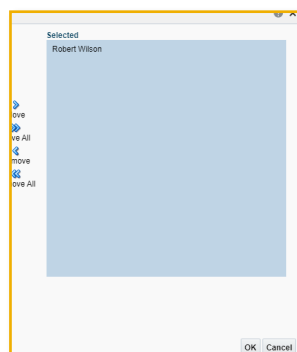| Step | Action |
|---|---|
| **3.** | Select the **UCD Faculty and Department Portfolio Report** link in the search results. |

| 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.** |



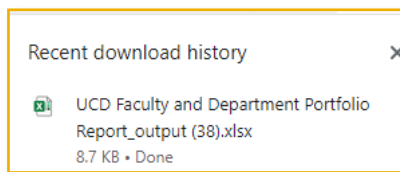| Step | Action |
|------|--------|
| 5. | In the **Search Sub Menu** type the **First and Last Name** of the person and select **Search** to see a list of results. |
| 6. | Select the **name of the PI** in the **Value** box and select **Move** to move the name to the **Selected** box**.** |



| 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. |
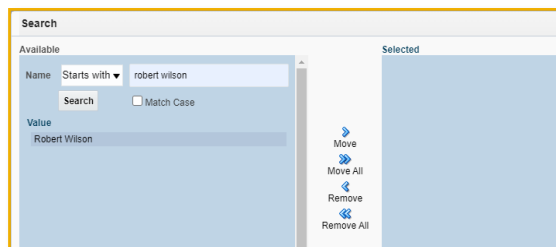
Recent download history                                    ✕

📊  UCD Faculty and Department Portfolio
     Report_output (38).xlsx
     8.7 KB • Done

| 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 | |
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