

# Module Snapshot: Grants Management

## This affects you if ...

You are responsible for managing, reviewing, or reporting on contract and grant activity.

Target audience: Campus sponsored project offices, other campus departments that receive monies from external granting agencies.

## What's New: Grants WorkCenter

Note: Because we are replacing our current customized project set-up with the remaining modules of the Grants Suite (Projects, Grants, and Contracts), almost everything related to Grants Management is new. The new WorkCenter feature consolidates Grants information so you can complete tasks easily and quickly. It does this by:

- Displaying a dashboard (real-time graphical views of award types and status – you can modify the dashboard to suit your needs)
- Compiling your current work (e.g., revenue plans requiring user action)
- Displaying Links to relevant update and inquiry transactions (these pre-built “favorites” enable rapid navigation to common tasks)
- Simplifying access to relevant PeopleSoft-delivered reports, public queries, and processes
- Overall, delivering content that is specific to you – the individual user – and that can be acted on from one page.

The Grants WorkCenter defaults to the dashboard display (see screenshot, below).

You will find the other functions, outlined above, in the WorkCenter’s various sections or pagelets: My Work (results of dynamic queries each time you go to the WorkCenter), Links, and Reports/Queries (PeopleSoft-delivered reports, public queries, and processes).

The screenshot displays the Oracle Grants WorkCenter Dashboard. The top navigation bar includes the Oracle logo, search fields, and user options like 'Home', 'Worklist', and 'MultiChannel Console'. The left sidebar is divided into 'Grants WorkCenter' (circled in red) and 'Links'. The 'Grants WorkCenter' section includes 'Main', 'Reports/Queries', and 'My Work' tabs, along with a list of process exceptions and AR action items. The 'Links' section lists tasks such as 'Enter and Maintain Proposals', 'Negotiate and Generate Award', and 'Establish and Maintain Award'. The main dashboard area contains two charts: 'Funding Amount by Award Type' (a bar chart showing funding amounts for Cooperative Agreement, Grant, and Task Order) and 'Project Amount By Department' (a pie chart showing the distribution of project amounts across departments like Administration, Business Services, Engineering, Human Resources, and Sales and Services).

Award Type	Foreign Amount (USD)
Cooperative Agreement	~500K
Grant	~2,000K
Task Order	~500K

Department	Percentage
Administration	41.22%
Business Services	0.4654%
Engineering	0.4654%
Human Resources	50.91%
Sales and Services	0.9367%

## What Else is New

One of the most significant developments is that with FIN 9.2, we will be integrating grants management with InfoEd for the Boulder and Denver campuses.

But wait, there's more.

The FIN 9.2 Grants module offers additional exciting functionality. You will be able to:

- ✓ Attach supporting documentation. This will make centralized record retention a reality.
- ✓ Establish flexible bill and revenue plans to manage how and when a sponsor is billed, as well as to manage revenue recognition. This will allow you to better match your plans to the terms of your award.
- ✓ Save time and effort by taking advantage of PeopleSoft-delivered functionality for F&A calculations, revenue recognition, letter of credit, and cost sharing. *These processes are customizations in the current FIN 8.4 environment – customizations that will be replaced with the delivered processed in our new FIN 9.2 environment.*
- ✓ Set up and manage milestones billing as critical tasks are completed. You will be able to identify the milestone (e.g., a report) and the associated funds. Later, when you mark that milestone as complete, the system will automatically generate the appropriate billing.

Note that the FIN 9.2 ChartField structure will include two additional ChartFields: PC Business Unit and Activity ID.

**PC (Project Costing) Business Unit:** In the world of FIN 9.2 projects, each campus will be its own business unit. For those of you familiar with Asset Management, the set-up is similar to that. Outside of projects, all campuses will continue to be part of the same (UCOLO) Business Unit.

**Activity ID:** You will see this new required field in the ChartField strings for projects. It will likely be the same value (e.g., "01") for all projects.

## What's More: Grants Portal

The Grants Portal is an additional level of management. It provides quick reporting and analysis at the grant level ... with drilldown capability into project-level information.

The screenshot displays the Oracle Grants Portal interface. At the top, there is a search bar with 'All' selected and a search icon. Below the search bar, there are tabs for 'Award Summary' and 'Search Option'. The user is identified as 'Hello, Kenneth Schumacher' and has '1253 new items in your worklist'. The 'Last Process Date/Time' is '05/14/2014 2:53:38PM'.

The 'Financial Calculating Option' section includes a dropdown for 'Balances' set to 'Both', a checked 'Include FA' checkbox, and fields for 'Budget Period From', 'Through', and 'Bud Ref'. A 'Recalculate' button is present. The 'Burn Rate Indicator' section shows three status indicators: 'Potential Under Spending' (yellow triangle), 'Average Rate Spending' (green circle), and 'Potential Over Spending' (red square).

The 'Detail' section features a table with columns: Award ID, Short Title, Primary Project, Project Title, Award Begin Date, Award End Date, and Sponsor. The table lists four awards, with the first three having green status indicators and the last one having a red status indicator.

Below the table is a summary table titled 'Total Amount of Selected Items' with columns for Selected, Funded, Budgeted, Expended, Encumbered, Pre-Encumbered, Remaining Balance, Invoiced, Received, and Unpaid. An 'Update Total Amount' button is located at the bottom right of this table.

Award ID	Short Title	Primary Project	Project Title	Award Begin Date	Award End Date	Sponsor
10.12.589B	new proposal	2587777	new proposal	10/01/2013	09/30/2015	National Renewable Energy Laborato
1013.50.2233B	DEVELOPMENT OF A CHEMICAL IONIZATION TIME-OF-FLIGHT MASS	1551331	DEVELOPMENT OF A CHEMICAL IONI	02/18/2014	11/17/2014	Aerodyne Research, Inc.
1013502233B	DEVELOPMENT OF A CHEMICAL IONIZATION TIME-OF-FLIGHT MASS	1551332	DEVELOPMENT OF A CHEMICAL IONI	02/18/2014	11/17/2014	Aerodyne Research, Inc.
1108.40.1766B	Nsdl Technical Network Services: A Cyberinfrastructure P	1545890	Nsdl Technical Network Service	01/01/2014	12/31/2014	Cornell University

Category	Amount	Category	Amount	Category	Amount
Selected	43	Expended	148,546.97	Invoiced	9,127.35
Funded	4,167,589.00	Encumbered	0.00	Received	50.00
Budgeted	3,865,559.00	Pre-Encumbered	0.00	Unpaid	9,077.35
		Remaining Balance	3,717,012.03		

You will be able to see all of your awards (or your department's awards or your PI's awards) – and all the projects associated with each of those awards.

When you select item(s) from the list, detailed information appears in the lower portion of the screen.