

State of Oklahoma

COR430

Grants Setup Manual

Office of Management & Enterprise Services



OKLAHOMA

Table of Contents

Document History.....	4
Grants Setup Overview	5
Key Terms.....	6
Process Flows.....	7
Grants Module Integration.....	7
PeopleSoft Grants Management	8
PeopleSoft Proposal Model.....	9
Defining the Institution.....	10
Institution General Information	10
Definition Tab	11
Information Tab.....	12
Attributes Tab.....	13
Address Tab.....	14
Institution Contracts.....	15
Institution Contracts Page.....	16
Institution F&A (Indirect Costs) Rates	17
F&A Rates Page.....	18
Defining the Sponsor	19
Sponsor General Information.....	19
General Information Tab.....	20
Details Tab	22
Attributes Tab.....	24
Sponsor F&A (Indirect Cost) Rates	25
Facilities Admin Rates Page	26
Sponsor Budget Items.....	27
Budget Items Page	28
Defining Departments.....	29
Department General Information.....	29
Department Tab.....	30
Address Tab.....	31
Attribute Tab	32



Department Contacts..... 33
 Department Contacts Page..... 34

Defining Professionals..... 35
 Professional Name and Address..... 35
 Professional Name & Address Page 36

Job and Employment Data 38
 Job Data Tab..... 39
 Employment Tab..... 40

Additional Grants Setup..... 41
 Budget Items 41
 Budget Items Page 42

Facilities Admin Bases (Indirect Cost) 43
 Facilities and Administration Bases..... 43
 Facilities and Administration Bases Page..... 44

Facilities Admin Rates (Indirect Costs) 45
 Facilities and Administration Rates 45
 Facilities and Administration Rates Page 46



Document History

<u>Document Revision</u>	<u>Date</u>	<u>Description</u>
1.0	06/01/2010	Initial Document
2.0	05/01/2014	Upgrade Update
3.0	12/09/2024	Upgrade Update

The content of this training manual is based largely on a generic system configuration and illustrates the base-line functionality required to execute transactions in the module. Your agency may be utilizing more or less of the functionality illustrated in this manual. This manual is intended to be a framework upon which agencies can add agency-specific training content that speaks specifically to the system functionality that they have deployed and related configuration that they use for transaction processing. Agencies should not depend on these manuals for end-user training or problem resolution until they have been reviewed by the agency for appropriateness.



Grants Setup Overview

The Grants module provides functionality to support both Pre and Post Award Grant administration and management. Before creating and administering Grants, configuration of Grant Required elements is necessary. Some of those configuration items include:

- Grant Sponsors
- Institutions
- Departments
- Professionals
- Subrecipients

The Grants module must have these and other related setup elements in place before Grant processing can begin.



Key Terms

Grants Business Unit: Each agency has one, and only one Grants Management Business Unit. The Business Unit is the three (3) digit agency code, plus 00. For example, Office of Management and Enterprise Services is 09000.

Grant Proposal: The Proposal represents the intent and request for Grant Funding from the State Agency. State Agencies create Grant Proposals that identify resources, projects, budgets, etc. that will be integral in the utilization of the funding request.

Grant Award: Once the Proposal has been negotiated and approved by the sponsoring entity, the Award represents the final agreement between the sponsor and the state agency for receipt and expenditure of funds.

Grant Professionals: Agency personnel responsible for administration of grant proposal.

Sponsors: The Sponsor represents the grant funding source. Generally, this is the Federal Agency through which federal grant funds are received.

Subrecipients: Subrecipients are entities or individuals that receive grant funding from the primary grantee within the parameters of a grant.

Project ID: Agency program or initiative funded by grant dollars (a.k.a. set aside).

Institution: State agency applying for grant funding and managing the grant funded projects.

Project Manager and Team: Agency personnel working on grant funded project.

Grant Contract Definition: The Contract defines funding Sponsor and Draw parameters for reimbursement. Also, defines reimbursable Product, Accounting and Grant funded Project relationships.

Facilities and Administration (F&A): The term F&A equates to Indirect Cost calculation for state agencies. This includes budgeting, calculating, and accounting for Indirect Costs.



Process Flows

Grants Module Integration

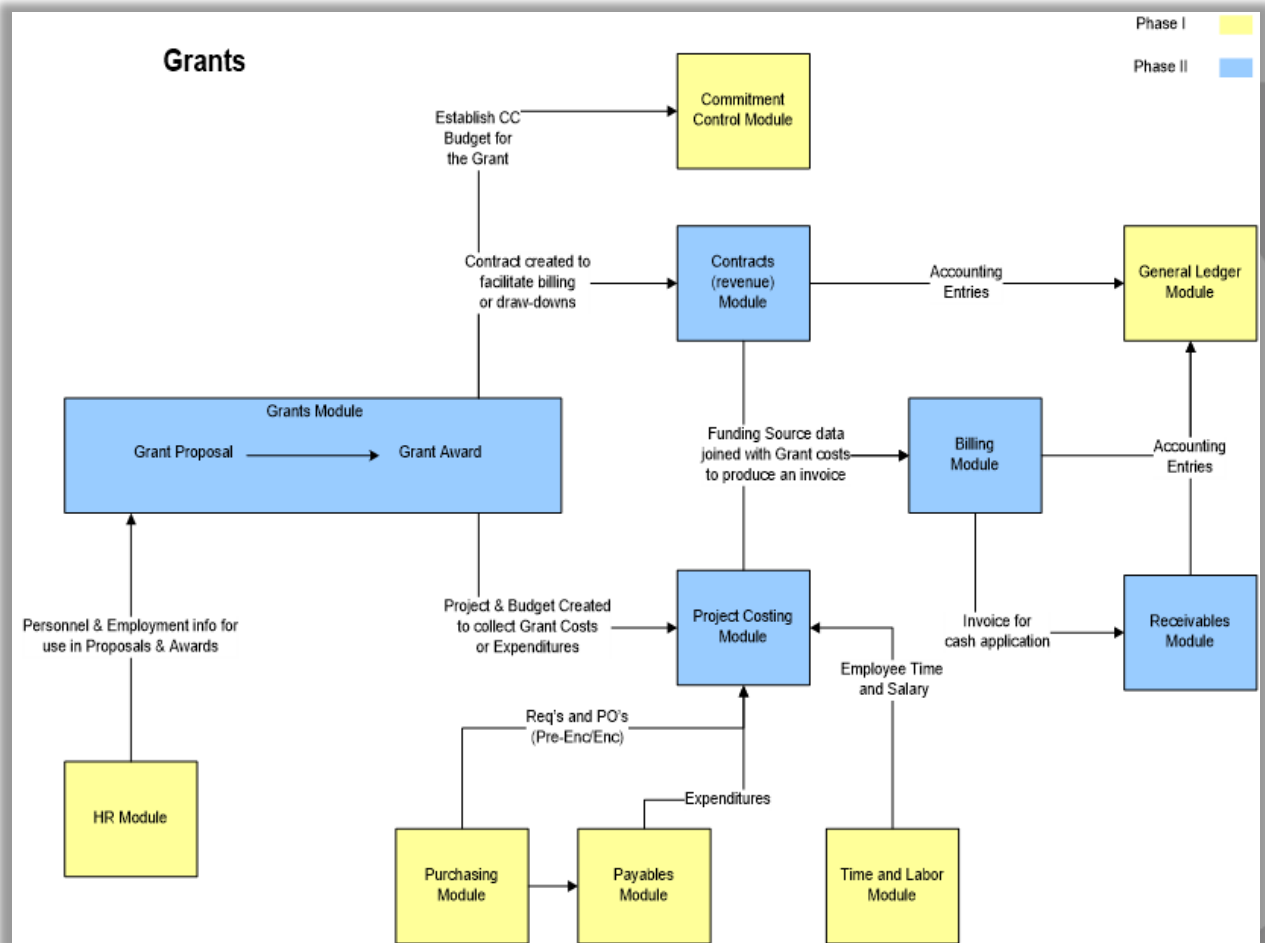


Diagram 1: Grants Module Integration

PeopleSoft Grants Management

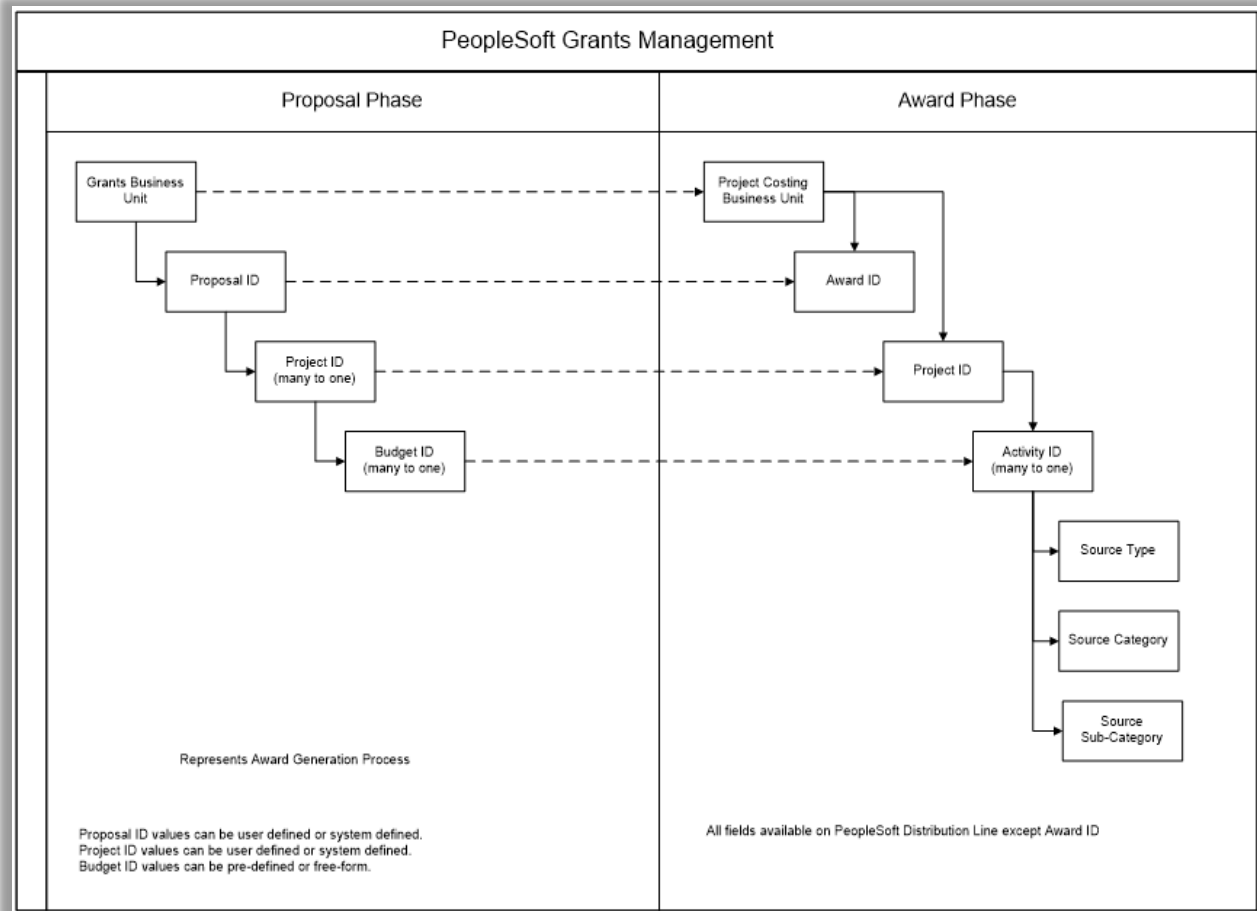


Diagram 2: Grants Chartfield Flow

PeopleSoft Proposal Model

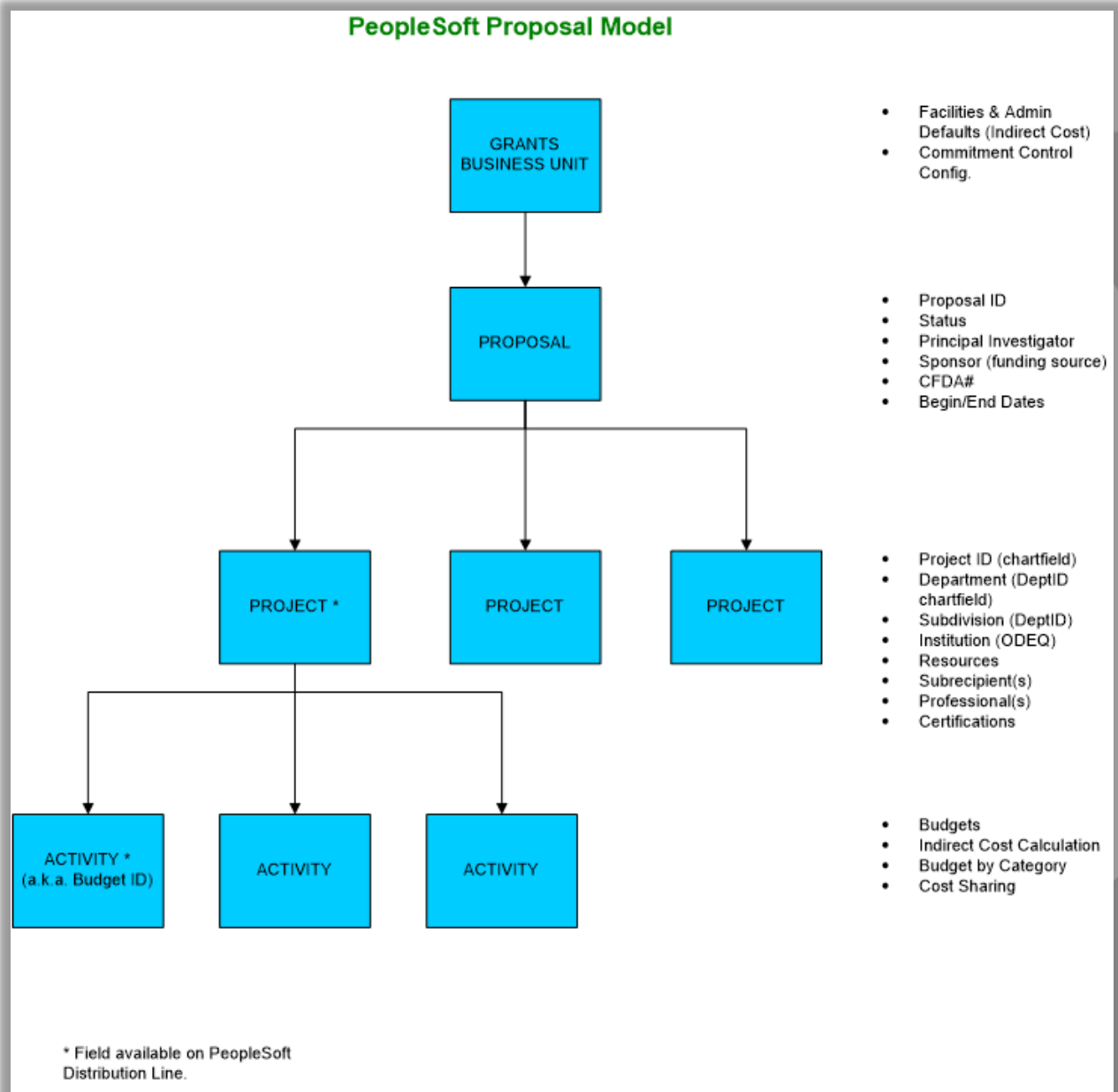


Diagram 3: Grants Proposal Model

Defining the Institution

The Institution in Grants represents the entity receiving grant funding. In the state deployment of Grants the Institution will generally equate to the Agency.

Institution General Information

Navigation: Grants > Institutions > Institution General Info > Find and Existing Value

Institution Profile

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

▼ Search Criteria

*SetID = ▼ Q

Institution ID begins with ▼

Description begins with ▼

Include History Correct History Case Sensitive

Search
Clear
Basic Search Save Search Criteria

Input the SetID for the Institution and **click** the **Search** button to retrieve results.



Definition Tab

Name	Information	Attributes	Address
SetID	29200	Institution	DEQ
		Description	Dept of Environmental Quality
		*Description	<input type="text" value="Dept of Environmental Quality"/>
		*Short Description	<input type="text" value="DEQ"/>
		Legal Name	<input type="text" value="Oklahoma Department of Environmental Quality"/>
<input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/> <input type="button" value="Add"/> <input type="button" value="Update/Display"/> <input type="button" value="Include History"/> <input type="button" value="Correct History"/>			

The **Institution Definition** page provides description information for the Institution (state agency).

Business Unit – is the Agency description.

Legal Name – is the legal entity or legal agency name.

Click the **Information** Tab.



Information Tab

The **Institution Information** page holds general data elements for the Institution.

Reports to – If the institution reports to another entity, the pre-defined value can be stored here.

Federal EIN – The agency federal Employer Identification Number can be stored.

Cost of Living/Institution Base – When creating Proposal Budgets default these values into the Budget for the Proposal.

Type – For the state deployment, Institution Type will be State Agency.

Click the **Attributes** Tab.



Attributes Tab

The screenshot displays the 'Attributes' tab interface. At the top, there are navigation tabs: 'Name', 'Information', 'Attributes' (which is selected and highlighted in blue), and 'Address'. Below these tabs, the main content area shows the following details:

- SetID:** 29200
- Institution:** DEQ
- Description:** Dept of Environmental Quality

Below this summary, there are two main sections:

- Attributes As Of:** This section includes an 'Effective Date' of 01/01/1951 and a 'Status' of Active. It also features a search icon, navigation arrows, and a 'View All' link.
- Detail:** This section contains a search bar, a dropdown menu for '*Attribute Type' with 'DUNS' selected, a text input field for '* Value' containing '933601569', and a text area for 'Comments'. It also includes a search icon, navigation arrows, and a 'View All' link.

At the bottom of the interface, there is a row of buttons: 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

The **Institution Attributes** page stores grant required properties for the institution.

Attribute Type – the attribute type is a predefined property of the Institution. An example of attribute type is the agency DUNS number.

Value – For the Attribute Type, the value displays the appropriate number or value for the attribute type.

Comments – Enter any comments specific to the Attribute Type.

NOTE: Use the **Plus (+) button** to insert additional Institution Attributes.

Click the **Address** Tab.

Address Tab

Name	Information	Attributes	Address
SetID	29200	Institution	DEQ
Description	Dept of Environmental Quality		
Institution Address as of			
Effective Date	01/01/1951	Status	<input type="checkbox"/> <input type="checkbox"/>
Address Information			
*Location	29203	DEQ - SHIPPING & RECEIVING	<input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/> Proposal Location <input checked="" type="checkbox"/> Billing Location <input checked="" type="checkbox"/> Award Location		Additional Info <input type="checkbox"/> <input type="checkbox"/>	
Phone			
Prefix	405	Telephone	702-7116
Ext		Fax	
Mailing Address			
Address 1	OK DEPT OF ENVIRONMENTAL QUALITY	Building #	
City	OKLAHOMA CITY	Floor #	
County		Sector	C
State	OK Oklahoma	Postal	73102
Country	USA United States	Jurisdiction	A
<input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/> <input type="button" value="Add"/> <input type="button" value="Update/Display"/> <input type="button" value="Include History"/> <input type="button" value="Correct History"/>			

The **Address Tab** displays the physical address or location for the Institution. The Location must be predefined before it can be defined as the Institution location.

Proposal Location – If this checkbox is selected the Location will default into the Grant Proposal when this Institution is used on the Proposal.

Award Location - If this checkbox is selected the Location will default into the Award Profile when the Proposal is generated into an Award.

Institution Contracts

Navigation: Grants > Institutions > Institution Contracts > Find an Existing Value

Institution Contacts

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)


▼ **Search Criteria**

*SetID = ▼ 🔍

Institution ID begins with ▼

Description begins with ▼

Include History Correct History Case Sensitive

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

Enter the Set ID (Business Unit) and **click** the **Search** button to retrieve results.



Institution Contracts Page

SetID 29200
Institution DEQ
Description Dept of Environmental Quality

Institution Contacts as of

| << < 1 of 1 > >> | View All

*Effective Date

*Status

Contact Detail

| << < 1 of 1 > >> | View All

*Employee ID

Job Code

*Location

Email

Currency

Threshold Amount

Approval Authority

Unlimited Threshold

Legally Bind Institution

Currency

Threshold Amount

Phone

| << < 1 of 1 > >> | View All

*Type

Phone

Official

| << < 1 of 1 > >> | View All

*Official Type

The **Institution Contact Page** can store multiple contacts that can be included in the Grant creation process. These values can default onto the Grant Proposal when the Institution is used.

Employee ID – Displays the individuals Employee ID.

Job Code – The employees’ job code can be displayed.

Email – The contact email can be displayed.

NOTE: Use the **Plus (+) button** to insert additional Institution Contacts.



Institution F&A (Indirect Costs) Rates

Navigation: Grants > Institutions > Institution F&A Rates > Find an Existing Value

Institution F&A Rates

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)


▼ **Search Criteria**

*SetID = ▼

Institution ID begins with ▼

Description begins with ▼

Include History Correct History Case Sensitive

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

Enter the Set ID (Business Unit) and **click** the **Search** button to retrieve results.



F&A Rates Page

Institution FA Rates

SetID 29200 Institution DEQ Description Dept of Environmental Quality

Rate Agreement 1 of 1 | View All

*Effective Date *Status

Agreement ID *Descr

*Negotiation Agency *Rate Status

Regional Office

Negotiation Date

Rate Type 1-1 of 1 | View All

*Rate Type FA Rate % *Descr

The **F&A Rates Page** displays F&A or Indirect Cost properties that can default into the Grant Proposal when the Proposal Budget is being created.

Negotiation Agency – Displays the Sponsor agency negotiating the F&A Rates defined on this page.

Rate Type – For each Rate Type defined, the FA Rate percentage can be defined and can default onto the Proposal.

NOTE: Multiple Rate Types can be defined for the Institution. These Rate Types can dictate different Indirect Cost rates for each Budget ID (a.k.a. Activity ID) used in the Grant Proposal.



Defining the Sponsor

The Grant Sponsor represents the entity providing grant funding. In the state deployment of the Grants system, the Sponsors will vary by agency and each agency will have their own set of sponsors.

Sponsors in the system are built on the ‘Customer’ framework. This logic is based on the premise that funds are received by both Customers and Sponsors. Grant Sponsors are special type of Customer and therefore have properties necessary for applying and receiving funding through the Granting process.

Sponsor General Information

Navigation: Grants > Sponsors > Sponsor General Information > Find an Existing Value

Sponsor General

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

▼ Search Criteria

*SetID = ▼ Q

Customer ID begins with ▼ Q

Name 1 begins with ▼

Name 2 begins with ▼

Telephone begins with ▼

City begins with ▼

State begins with ▼

Postal Code begins with ▼

Include History Correct History Case Sensitive

Search
Clear
Basic Search
Save Search Criteria

Enter the SetID and any other Sponsor Information known and **click** the **Search** button to retrieve search results.



General Information Tab

General Info
Details
Attributes
Bill To Options
Ship To Options
Sgld To Options
Miscellaneous General Info

SetID 29200 Sponsor 0000026609

General Info Links ...More

*Status Active

*Date Added 01/01/1951

*Name 1 OFFICE OF FEDERAL ACTIVITIES

Name 2 ENVIRONMENTAL PROTECTION AGENCY

Currency Code USD

Level Regular

*Type User 1

*Short Name OFFICE OF

*Since 01/01/1951

Rate Type CRRNT

Roles

<input checked="" type="checkbox"/> Bill To Customer	<input checked="" type="checkbox"/> Correspondence Customer	Consolidation Business Unit
<input checked="" type="checkbox"/> Bill To Selection	<input checked="" type="checkbox"/> Correspondence Selection	
<input checked="" type="checkbox"/> Ship To Customer	<input checked="" type="checkbox"/> Remit From Customer	
<input checked="" type="checkbox"/> Ship To Selection	<input checked="" type="checkbox"/> Remit From Selection	
<input checked="" type="checkbox"/> Sold To Customer	<input checked="" type="checkbox"/> Corporate Customer	
<input type="checkbox"/> Broker Customer	<input type="checkbox"/> Consolidation Customer	
<input checked="" type="checkbox"/> Indirect Customer	<input checked="" type="checkbox"/> Grants Management Sponsor	

Federal Attributes

<input type="checkbox"/> Federal Customer	Trading Partner Code 	Disbursing Office
<input type="checkbox"/> Appropriation Symbol Not Required for Reimbursable Agreements		

Contracts Options

Hold Billing on Unpaid Cost

Support Teams

STATE
1-1 of 1
View All

Team Code	Default	Description
STATE	<input checked="" type="checkbox"/>	State Team

Address Locations

1
1 of 1
View All

*Location 1

Description

Bill To

Ship To

Sold To

Primary

Primary

Primary

Broker

Indirect

Correspondence Address

Primary

Primary

RFID Enabled [VAT Default](#) [VAT Service Treatment Setup](#)

Address Details

01/01/1951
Active

Tax Code

Physical Nature

Alternate Name 1

Language Code English

Where Performed

Alternate Name 2

Country USA United States

Address 1 1200 N. PENNSYLVANIA AVE NW

Address 2

Address 3

[View Phone Information](#)

City WASHINGTON In City Limit

County Postal 20460

State DC District of Columbia

General Info Links ...More

Save Return to Search Notify Refresh

Add Update/Display Include History Correct History

OKLAHOMA
Office of Management
& Enterprise Services

The **General Info** Tab stores data used in creating and processing the Grant Proposal and Award.

Grants Management Sponsor – The selection of this checkbox indicates that the ‘Customer’ is a Grants Customer.

Support Teams – A required **Team Code** can represent those individuals participating in the Grant Proposal and Award process.

Address Details – The Sponsor Address information is displayed.

Click the **Details** Tab.



Details Tab

General Info	Details	Attributes	Bill To Options	Ship To Options	Sgld To Options	Miscellaneous General Info
SetID	29200	Sponsor	0000026609			
Level	<input type="text"/>	<input type="checkbox"/>	Federal	<input type="checkbox"/>	Allow CO-PI's	
Sponsor Type	<input type="text"/>	<input type="checkbox"/>	US Flag Carrier Required	<input type="checkbox"/>	Allow Multiple PI's	
Program Type	<input type="text"/>	<input type="checkbox"/>	Foreign	<input checked="" type="checkbox"/>	Show Indirect Expenses on FFR	
Reports To Sponsor	<input type="text"/>	Cost of Living Increase Pct	<input type="text"/>			
CFDA Number	66.454	Sponsor Salary Cap	0.00			
Sponsor Base	<input type="text"/>	Not allowable Construction Pct	<input type="text"/>			
Allowable Construction Pct	<input type="text"/>	Federal Share Percentage	100.00			
Letter of Credit Details						
Letter of Credit: <input checked="" type="checkbox"/>						
Letter of Credit Sponsor	<input type="text"/>	OFFICE OF FEDERAL ACTIVITIES				
DEIU Map ID	<input type="text"/>					
Letter of Credit Info						
LOC Number	L802F15501	Comments	L802F15501		Type	Detailed
					<input type="checkbox"/>	Primary
					Status	Active
Save	Return to Search	Notify	Refresh	Add	Update/Display	Include History
					Correct History	

The **Details Tab** stores information used in F&A (Indirect Cost) budget calculations, Letter of Credit and Proposal Budgeting.

Federal – This checkbox indicates the Sponsor is a federal entity.

Sponsor Base – For F&A calculations purposes, this defines the types of costs (called Budget Items) that are eligible for Sponsor indirect cost calculations.

Letter of Credit – This checkbox indicates that the Sponsor uses Letter of Credit.

Letter of Credit Sponsor – Generally, this value will be the Sponsor ID itself. This indicates that the Sponsor is eligible to store a Letter of Credit Number.



LOC Number – This is the Sponsor Letter of Credit number. This number is a Sponsor level number rather than a Grant level number. On the Sponsor setup, this field is only defining valid values for the Sponsor that can be used in the Grant Proposal and Award process.

NOTE: The Letter of Credit Number is a Sponsor applicable field and value. The Letter of Credit Document ID is a Grant specific field and value. The Letter of Credit Document ID is stored on the Grant Contract (or Grant Project) and is defined after the Grant Proposal is generated into an Award.

Click the [Attributes](#) Tab.

Attributes Tab

The Attributes Tab can store Sponsor specific information defined by the agency. These attributes could be codes, compliance information, or grant required parameters.

Attribute Type –The attribute type is a predefined property of the Sponsor.

Attribute Value – For the Attribute Type, the value displays the appropriate number or value for the attribute type.

Comments – Enter any comments specific to the Attribute Type.

NOTE: Use the **plus (+)** button to insert additional Sponsor Attributes.



Sponsor F&A (Indirect Cost) Rates

Navigation: Grants > Sponsors > Sponsor F&A Rates > Find an Existing Value

Facilities & Admin Rates

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

*SetID =

Sponsor ID begins with

Name 1 begins with

Include History Correct History Case Sensitive

[Basic Search](#)

Input the **SetID** and **Sponsor ID** and **click** the **Search** button to access the Facilities Admin Rates Page

Facilities Admin Rates Page

Sponsor FA Rates

SetID 29200 Sponsor 0000026609 OFFICE OF FEDERAL ACTIVITIES

Facilities and Administration As Of Q | << < 1 of 1 > >> | View All

*Effective Date *Status

Same as Institution
 Facilities Admin Waiver List

Detail Q | << < 1-1 of 1 > >> | View All

*Rate Type FA Rate % *Description

The **Facilities Admin Rates Page** displays F&A or Indirect Cost properties that can default into the Grant Proposal when the Proposal Budget is being created.

Same as Institution – This checkbox will be selected if the Institution and Sponsor have the same rate. Generally, in state deployment of Grants this will be the case.

Rate Type – For each Rate Type defined, the FA Rate percentage can be defined and can default onto the Proposal.

NOTE: Multiple Rate Types can be defined for the Sponsor. These Rate Types can dictate different Indirect Cost rates for each Budget ID (a.k.a. Activity ID) used in the Grant Proposal.

Click the **Save** button.

Sponsor Budget Items

Navigation: Grants > Sponsors > Sponsor Budget Items > Find an Existing Value

Budget Items

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)


▼ **Search Criteria**

*SetID =

Sponsor ID begins with

Name 1 begins with

Include History Correct History Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

Input the **SetID** and **Sponsor ID** and **click** the **Search** button to access the Budget Items page.



Budget Items Page

Sponsor Budget Items

SetID 29200 Sponsor 0000026609 OFFICE OF FEDERAL ACTIVITIES

Budget Items As Of Q | << < 1 of 1 > >> | View All

*Effective Date *Status

Details Q | << < 1-1 of 1 > >> | View All

*Budget Category Description

The **Budget Items Page** can be used to define particular Budget Items applicable to this Sponsor. These Budget Items can be used when developing a Grant Budget for this Sponsor.

Budget Item – Defines the Budget Item(s) that will be used to budget costs for this Sponsor. Generally, these will be the categories of expenditures used for agency grant processing.

NOTE: Budget Items will be defined by the agency and generally match those expenditure categories defined by the sponsoring entity. For example, Budget Items could be Salary, Fringe, Travel and Equipment.



Defining Departments

Departments are used in the Grant Proposal and Award process to define agency specific divisions that represent ownership of a Proposal, F&A or Indirect Cost designation and budget assignment.

When selecting a Department in the Grants module for a Proposal or Award, the available values are the same as the Department ID Chartfield. Additional properties can be assigned to each Department ID value that will be used in the Grant process. These properties can be individuals, address, and attributes.

Department General Information

Navigation: Grants > Departments > Department General Information > Find an Existing Value

Department Profile

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

*SetID = 🔍

Dept begins with 🔍

Description begins with

Include History Correct History Case Sensitive

Search
Clear
Basic Search Save Search Criteria

Input the **SetID** and **Department** and **click** the **Search** button to access the Department page.



Department Tab

The screenshot displays the 'Department Manager' tab. At the top, there are three tabs: 'Department' (selected), 'Address', and 'Attribute'. Below the tabs, the following information is displayed:

- SetID: 29200
- Dept: 1112620
- Description: Building Operations

The main content area is titled 'Department Manager' and includes a search bar with a magnifying glass icon and a 'View All' link. Below the search bar, the following fields are visible:

- Effective Date: 01/01/1951
- Status: Active
- Manager ID: [Empty field]
- Manager Name: [Empty field]
- Major Subdivision: 1112620 (with a search icon)
- Building Operations: [Text]
- Institution: DEQ (with a search icon)
- Dept of Environmental Quality: [Text]
- SPO: [Empty field] (with a search icon)
- Contact: [Empty field]

At the bottom of the form, there are several buttons: 'Save', 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.

The **Department** Tab allows the agency to assign additional properties to the Department ID that will be used in the Grant Proposal creation process.

Manager ID – Assign a Department Manager to the Department.

Major Subdivision – Optionally, identify a subdivision of the Department. This value is required on the Grant Proposal even if the subdivision is the same as the Department.

Institution – Identify the institution that will be using this Department. Generally, this will be the agency.

Click the **Address** tab.



Address Tab

Department	Address	Attribute
SetID 29200	Dept 1112620	Description Building Operations
Department Address Info <input type="text"/> << < 1 of 1 > >> View All		
*Effective Date	11/07/2024 <input type="text"/>	*Status Active <input type="text"/> <input type="button" value="+"/> <input type="button" value="-"/>
Location	29203 <input type="text"/>	DEQ - SHIPPING & RECEIVING
Email	<input type="text"/>	URL <input type="text"/>
Phone		
Prefix	405	Telephone 702-7116
Ext		Fax
Mailing Address		
Address 1	OK DEPT OF ENVIRONMENTAL QUALITY	Building #
City	OKLAHOMA CITY	Floor #
County		Sector C
State	OK Oklahoma	Postal 73102
Country	USA United States	Jurisdiction A
<input type="button" value="Save"/>	<input type="button" value="Return to Search"/>	<input type="button" value="Notify"/>
		<input type="button" value="Update/Display"/> <input type="button" value="Include History"/> <input type="button" value="Correct History"/>

The **Address** Tab allows the agency to assign a pre-defined Location value as the address for the Department.

Location – This is a pre-defined physical location that can be linked to the Department. The Location defined for the Department will default into the Grant Proposal as the Project Location (See COR431 – Grant Proposal and Award Management manual).

Email – Define the email address for the Department Address.

Phone/Mailing Address – These sections of the page will default from the Location value when it is selected.

Click the **Attribute** Tab.

Attribute Tab

Department Address **Attribute**

SetID 29200 Dept 1112620 Description Building Operations

Department Attributes As Of

Effective Date 11/07/2024 Status Active

Department Attributes

Attribute Type

* Value

Comments

Save Return to Search Notify Update/Display Include History Correct History

The **Attribute** Tab can store Department specific information defined by the agency. These attributes could be codes, compliance information, or grant required parameters.

Attribute Type – The attribute type is a predefined property of the Department.

Value – For the Attribute Type, the value displays the appropriate number or value for the attribute type.

Comments – Enter any comments specific to the Attribute Type.

NOTE: Use the **plus (+)** button to insert additional Department Attributes.



Department Contacts

Navigation: Grants > Departments > Department Contacts > Find an Existing Value

Department Contacts

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

SetID =

Dept begins with

Manager Name begins with

Include History Correct History Case Sensitive

[Basic Search](#)

Input the **SetID** and **Department** and **click** the **Search** button to access the Department Contacts page.



Department Contacts Page

Department Contacts
SetID 29200 Dept 1100001 Description Admin Services Div Operational

Department Contacts As Of
Q | << < 1 of 1 > >> | View All

*Effective Date
*Status

Contact Details
Q | << < 1 of 1 > >> | View All

*Empl ID

Job Code

*Location

Email

Approval Authority

Unlimited Threshold
Currency

Legally Bind Institution
Threshold Amount

Phone
1-1 of 1 >>> | View All

*Type	Phone	
<input type="text"/>		

Official
1-1 of 1 >>> | View All

Type		
<input type="text"/>		

Save
Return to Search
Previous in List
Next in List
Notify
Update/Display
Include History
Correct History

The **Department Contacts Page** allows the agency to assign individuals as contacts for the Department. When the Department is used in the Grant Proposal and Award process, these Contacts can be assigned as contact resources for the Department.

EmplID – This employee is defined as the Department Contact. The Employee ID can be selected from a pre-defined list of agency resources.

Job Code – This field stores the job for the Department Contact.

Location – The Location defines the physical location for the Department Contact.

Email – Defines the Contact email address for the individual.

NOTE: Use the **plus (+)** button to insert additional Department Contacts.



Defining Professionals

Professionals are agency personnel that participate in the Grant administration, support or execution roles. Professionals are assigned initially to a Grant Proposal and can be linked to a particular role on the Grant.

Professionals for Grant processing can have various properties including Job Code, Job History, or other Grant related information.

Professional Name and Address

Navigation: Grants > Professionals > Professional Name and Address > Find an Existing Value

Professional Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

Search Criteria

Empl ID begins with ▼

Name begins with ▼

Last Name begins with ▼

Include History Correct History Case Sensitive

Search
Clear
Basic Search
Save Search Criteria

Enter the **Employee ID** or **Name** and click the **Search** button to retrieve results.



Professional Name & Address Page

Professional Name & Address

Empl ID 100001 *Gender *Personnel Status

[i](#)

General Info Q | < > 1 of 1 | View All

*Eff Date [📅](#)

Prefix

*Last Name [🔍](#)

*First Name

*Mar Status

Name Suffix

Middle Name [Address](#)

Name

+ -

Search/Match Data

First Name Last Name

Country Info Q | < > 1 of 1 | View All

Country *NID Type

+ -

Citizenship Info. Q | < > 1 of 1 | View All

*Country Citizenship Status

+ -

Phone Info Q | < > 1 of 1 | View All

*Type Phone

+ -

Email Info Q | < > 1 of 1 | View All

*Type *Email

+ -

Misc. Info Q | < > 1 of 1 | View All

*Eff Date [📅](#)

Rate Type

Date Certified

Howard Hughes Member

Eligible PI

[Ethnicity](#)

Workflow Eligible

Conflict of Interest

[Disability](#)

Pre Award Administrator


Post Award Administrator

+ -

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

[Add](#) [Update/Display](#) [Include History](#) [Correct History](#)

The **Professional Data Page** displays employment information for agency resources. This information can be used in the Grant Proposal and Award process.



OKLAHOMA
Office of Management
& Enterprise Services

Professional Data Page continued

Professional Name & Address

Empl ID 100001 *Gender *Personnel Status

General Info | 1 of 1 | View All

*Eff Date 06/30/1996 *Mar Status + -

Prefix Name Suffix

*Last Name Buchenau Middle Name E Address

*First Name Bernie Name Buchenau, Bernie E

Search/Match Data

First Name BERNIE Last Name BUCHENAU

The **General Information** section of the page displays basic employee data.

Phone Info | 1 of 1 | View All

*Type Business Phor Phone XXXXXXXXXX + -

Email Info | 1 of 1 | View All

*Type Business *Email XXXXXX@XXXX.XXX + -

The **Phone** and **Email** sections of the page display employee phone and email information.

Misc. Info | 1 of 1 | View All

*Eff Date 11/07/2024 Howard Hughes Member Workflow Eligible Pre Award Administrator + -

Rate Type Regular Eligible PI Conflict of Interest Post Award Administrator

Date Certified Ethnicity Disability

Eligible PI – This checkbox indicates that the individual is eligible to be identified as a Professional on the Grant Proposal (See COR431 – Grant Proposal and Award Management manual).

Job and Employment Data

Navigation: Grants > Professionals > Professional Job and Employment > Find an Existing Value

Job and Employment Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria


Empl ID

Name

Last Name

Business Title

Include History Correct History Case Sensitive

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

Enter the **Employee ID** or **Name** and click the **Search** button to retrieve results.



Job Data Tab

The screenshot displays the 'Job Data' tab for an employee. At the top, there are tabs for 'Job Data' and 'Employment'. Below the tabs, the employee's name 'Buchenau, Bernie E' and ID '100001' are shown. The main section is titled 'Employee Data' and contains several input fields and dropdown menus. The 'Employee Status' is set to 'Retired' with an effective date of '07/01/2007'. The 'Reason Code' is 'S02' and the 'Action' is 'RET'. The 'Employee Classification' is a dropdown menu, and the 'Effective Sequence' is '0'. The 'Action Date' is '06/19/2007'. Below this, the 'Position Number' is '54800139' and the 'Unit' is '54800'. The 'Dept' is '1060004' (Network Management Services) and the 'Job Code' is 'B51C' (Information Sys Application Sp). The 'Location' is '64'. At the bottom of the form, there are fields for 'Annual Rate', 'Monthly Rate', and 'Hourly Rate', along with 'Currency' (USD), 'Compensation Frequency' (M), and 'Compensation Rate'. A row of buttons at the very bottom includes 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

The **Job Data** Tab displays job specific data for the resource.

Department – Defines the Department value for the employee.

Job Code – Indicates the Job Code for the employee.

Location – Defines the Location for the employee.

NOTE: Most of the information on the Job Data page is derived from the HCM System (Human Capital Management).

Click the **Employment** Tab.



Employment Tab

Job Data

Employment

Name Buchenau, Bernie E
ID 100001

Employment Information

Hire Date	06/30/1996	Termination Date	06/30/2007
Rehire Date	06/30/1996	Last Date Worked	06/30/2007
Company Seniority Date	12/01/1997	Expected Return Date	
Service Date	12/01/1997	Last Verification Date	
Professional Experience Date	12/01/1997	Probation Date	
Date Last Increase	10/01/2006	*Home/Host	Home

Business Title

Work Phone

Supervisor ID

Reports To Position

Save
Return to Search
Notify

Add
Update/Display
Include History
Correct History

The **Employment** Tab stores details employment history and additional employment details for the employee.

Additional Grants Setup

In addition to Sponsors, Professional, Departments, and Institutions, the Grants system uses additional pre-defined values to create and process Grant Proposals and Awards.

Budget Items

Navigation: Setup Financials Supply Chain > Product Related > Grants > Setup GM Budget Items > Find an Existing Value

Budget Items

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

*SetID =

Budget Item

Include History Correct History

[Basic Search](#)

Input the **SetID** and **click** the **Search** button to retrieve results. The user can also input the **Budget Item** if known to search for it directly.



Budget Items Page

Budget Items

SetID 29200 Budget Item CONSTRUCTION

Budget Items

1-1 of 1 | View All

General Info **Projects** GL Chartfields

*Effective Date	*Effective Status	Budget Item Type	*Description	Unit of Measure
01/01/1951	Active		Construction	(Invalid V

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display Include History Correct History

Budget Items define the categories of costs that are included in a Grant Budget. Budget Items can also default in other Chartfield values including both “GL Chartfields” and “Project Costing Chartfields”.

When Budget Items are selected onto the Grant Proposal, the Chartfields defined on this page will default onto the Budget Line as well.

Click the **Projects** Tab.

Budget Items

SetID 29200 Budget Item CONSTRUCTION

Budget Items

1-1 of 1 | View All

General Info **Projects** GL Chartfields

Source Type	Category	Subcategory	Job Code	Empl ID	Project Role
CONST	%	%	%	%	%

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display Include History Correct History

The **Projects** and **GL Chartfields** Tabs allow the user to define the Chartfields that will default into the Grant Budget Line when the Budget Item is selected.



Facilities Admin Bases (Indirect Cost)

Navigation: Setup Financials Supply Chain > Product Related > Grants > Setup Grants F&A Bases > Find an Existing Value

Facilities and Administration Bases

Facilities and Admin Bases

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

▼ Search Criteria

*SetID = Q

FA Base ID begins with

Description begins with

Include History Correct History Case Sensitive

Search
Clear
Basic Search
Save Search Criteria

Input the **SetID** and **click** the **Search** button to retrieve results. The user can also input the **FA Base ID** if known to search for it directly.

Facilities and Administration Bases Page

Facilities and Administration Bases

SetID 29200 FA Base ID TEST

Details
Q
|
◀
◀
1 of 1
▶
▶
|
View All

*Effective Date

*Description

*Status

Budget Item Details

◀
◀
1-2 of 2
▶
▶

*Budget Item	Description		
<input type="text" value="CONSTRUCTION"/>	Construction	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="OTHER"/>	Other	<input type="button" value="+"/>	<input type="button" value="-"/>

Facilities and Administration Bases store the Budget Items that the system uses to calculate the budgeted F&A (Indirect Costs) Amounts for Grant Proposal Budgets.

F&A and Pricing Setup are configured in the Grant Proposal, including indirect cost rates. Those rates are applied to the Budget Items defined for the Facilities and Administration Bases. The result of that calculation makes up Budgeted F&A or Indirect Cost amounts.

NOTE: F&A Bases are also used in the calculation of actual F&A or Indirect Cost amounts in the Post-Award process. Trees are also used in the calculation of actual Indirect Costs.



Facilities Admin Rates (Indirect Costs)

Navigation: Setup Financials Supply Chain > Product Related > Grants > Facilities Admin Rates > Find an Existing Value

Facilities and Administration Rates

Facilities and Admin Rates

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

*SetID =

FA Rate ID begins with

Description begins with

Include History Correct History Case Sensitive

[Basic Search](#)

Input the **SetID** and **click** the **Search** button to retrieve results. The user can also input the **FA Rate ID** if known to search for it directly.



Facilities and Administration Rates Page

Facilities and Administration Rates
SetID 29200 FA Rate ID ONSIT
Facilities and Administration Rates
1-1 of 1

*Effective Date	*Status	*Description	*Short Description		
11/07/2024	Active	Onsite Rate for FY24	ONSIT FY24	+	-

Save Notify Add Update/Display Include History Correct History

Facilities and Administration Rates are used to store the different F&A or Indirect Cost rates that are negotiated with Sponsors. Used on the Grant Proposal, F&A Rates can store multiple rates if necessary. For example, rates could be different for On-Site versus Off-Site labor.

NOTE: To use multiple F&A Rate, multiple Budget ID's, (a.k.a. Activity ID's) must be defined for the Grant Proposal (See COR431 – Grant Proposal and Award Management manual).
