

State of Oklahoma

COR431

Grants – Grants Proposal and Pre-Award
Management Manual

Office of Management & Enterprise Services



OKLAHOMA

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Document History

<u>Document Revision</u>	<u>Date</u>	<u>Description</u>
1.0	06/01/2010	Initial Document
1.1	05/01/2014	Upgrade Update
2.0	11/22/2024	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 Pre-Award Overview

The Grants module provides functionality to support both Pre and Post Award Grants administration and management. Grants Proposal and Award features include:

- Grants Proposal creation and management
- Grants Proposal Budgeting
- Indirect Cost Budgeting and Calculation
- Automated Federal Reimbursement Calculations
- Review of Grants Proposal and Award history online
- Track Expenditure Limits against Grants Budget for reimbursement checking
- Track and manage Award Close-out activities

The Grants module works in combination with the Project Costing module to track and report on Grants funded Projects and Activities.



Key Terms

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

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

Grants 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.

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

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

Project ID: Agency program or initiative funded by Grants dollars (a.k.a. set aside). Institution State agency applying for Grants funding and managing the Grants funded projects.

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

Grants Contract Definition: The Contract defines funding Sponsor and Draw parameters for reimbursement. Also, defines reimbursable Product, Accounting, and Grants 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.

Cost Share: The term Cost Share refers to the agency contributing costs in addition to those received from the Sponsor, to accomplish Grants program goals.

Letter of Credit Number: The Letter of Credit ID is a Sponsor specific number used to track Grants draws throughout the system.

Letter of Credit Document ID: The Letter of Credit Doc ID is a Grants Project specific number, inputted on the Grants Contract Line, used to track Grants draws throughout the system.



Process Flows

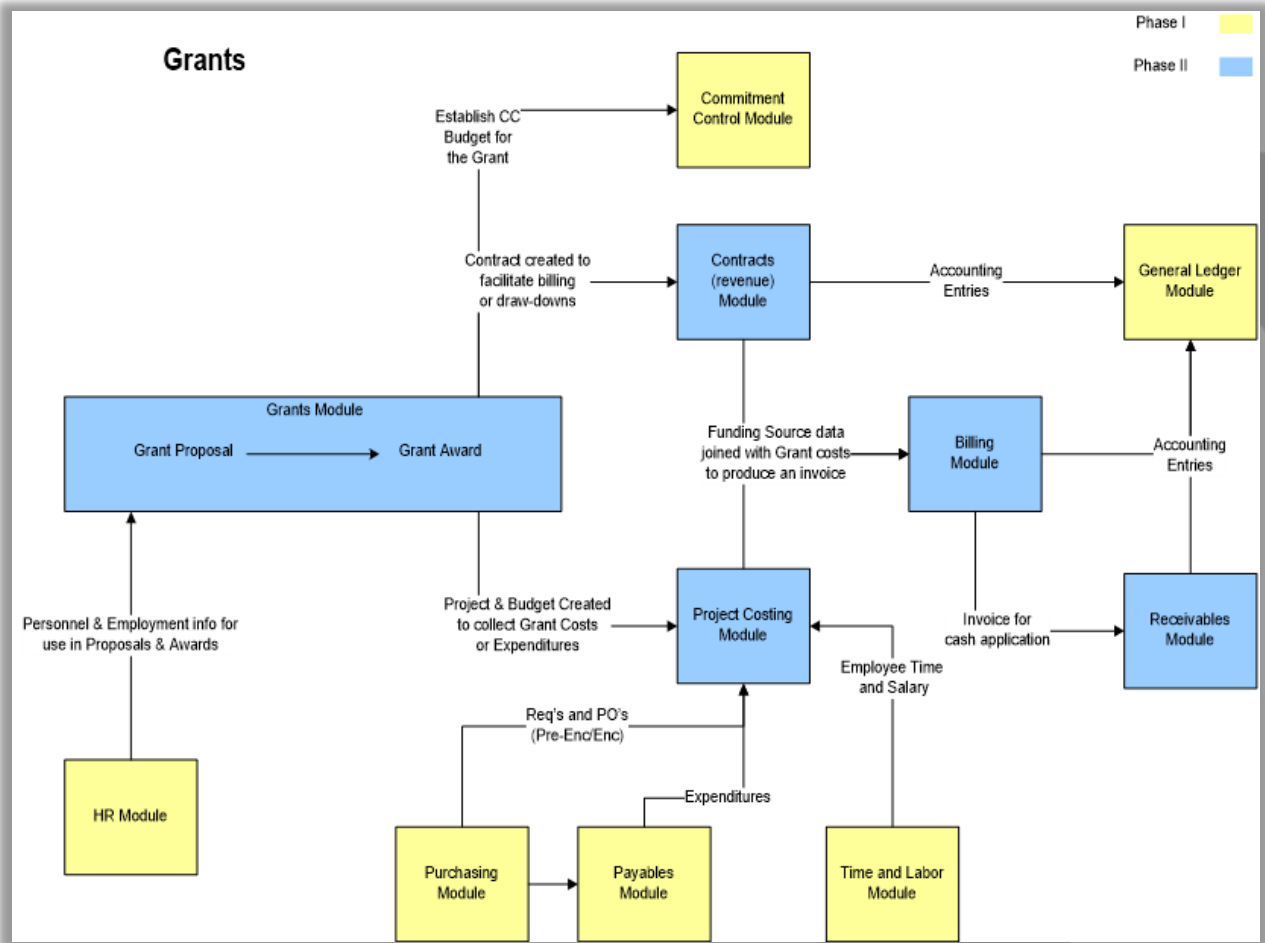


Diagram 1: Grants Module Integration

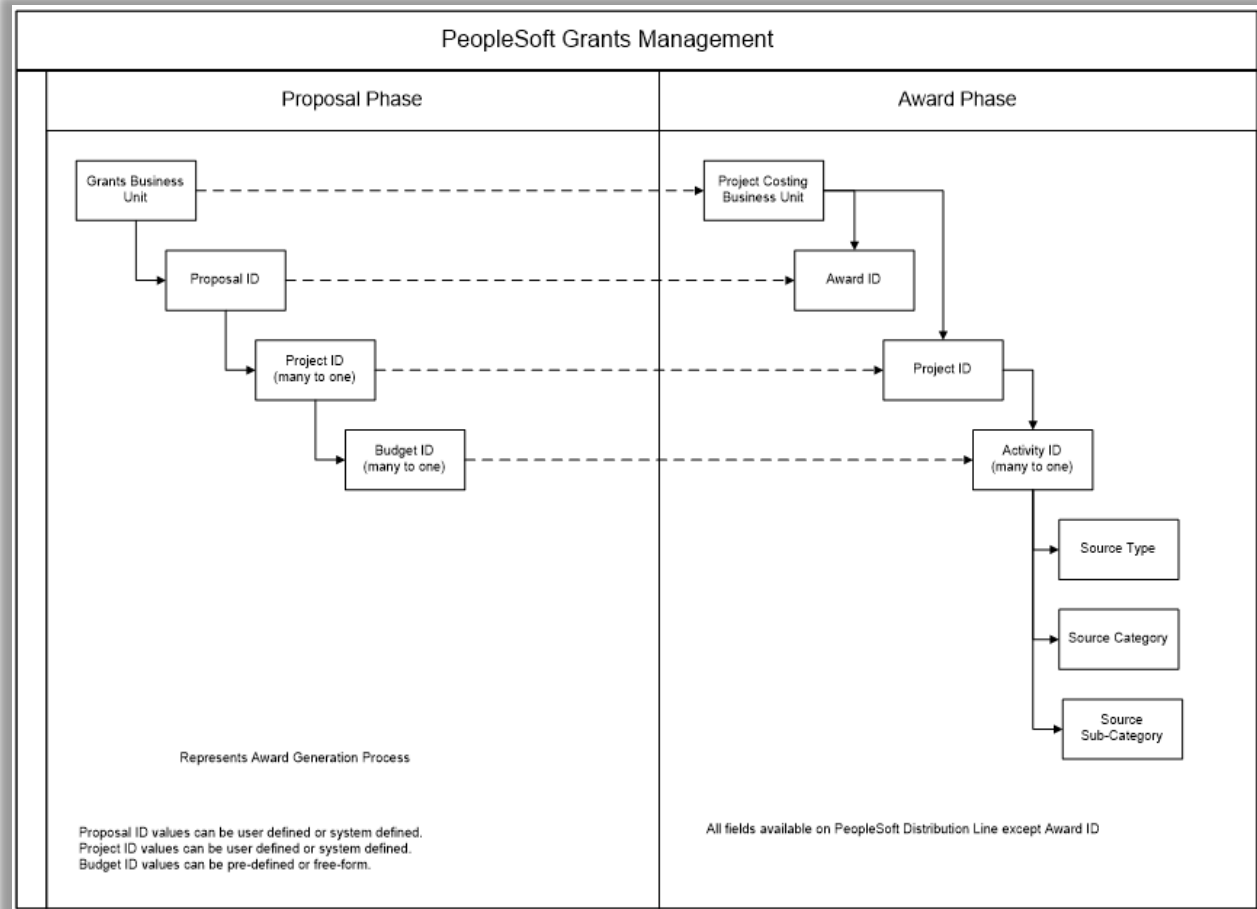


Diagram 2: Grants Chartfield Flow

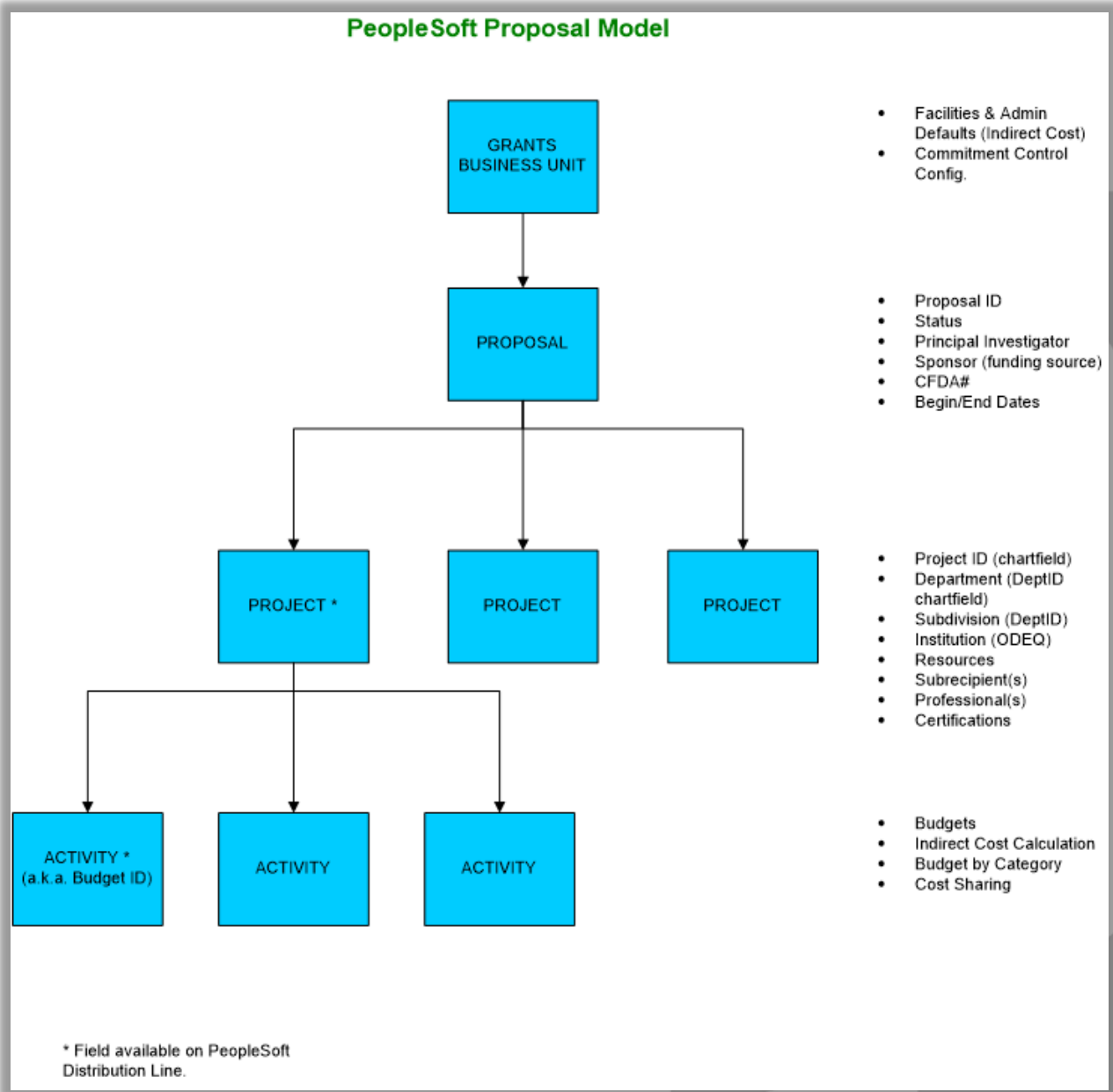


Diagram 3: Grants Proposal Model

Create a Grants Proposal

The Grants Proposal represents the agencies application for Grants funding. The Grants Proposal contains a Sponsor of funding, begin and end dates, Indirect Cost rates, Budget dollars, Cost Share configuration and other Grants required information.

Step 1: Adding a Grants Proposal

Navigation: Grants > Proposals > Maintain Proposals > Add a New Value

Maintain Proposal

Find an Existing Value Add a New Value

*Business Unit 29200 🔍

*Proposal ID NEXT 🔍

*Version ID V101

Add

Business Unit – The Agency in which the Grants Proposal will be created.

Proposal ID – Leave this value as ‘NEXT’, as the system will sequentially assign the next available Proposal ID.

Version ID – The Version number for this Proposal. Leave this value as the default, “NEXT” for the first version of the Proposal.

Click the **Add** button to enter the Grants Proposal pages.



Proposal Tab

Period	*Start Date	*End Date	Previous End Date	Next End Date	Target Sponsor Budget
1					

The **Proposal** Tab defines general information and processing options for the Grants Proposal.

NOTE: Not all fields available in Grants pages will be defined and explained in this training manual. Those fields not referenced in the manual are generally not required for transaction processing.

Description – Enter a general description of the Grants Proposal.

Title – Enter a Title for the Grants Proposal. This generally will be a more specific descriptive value than the Proposal Description.

PI ID – The ‘Primary Investigator’ is the agency resource identified as the lead individual for the Grants Proposal.

Sponsor ID – The Sponsor represents the entity responsible for evaluating, approving, and granting the funding for this Proposal.

Proposal Type – Describes the kind of Grants Proposal. For a first time Grants Proposal, use the ‘New’ value.

CFDA – Select from a pre-defined list of federally issued CFDA numbers.

Proposal Status – Defines a particular status for the Grants Proposal. For new proposals, leave this value as ‘Draft’.

Facilities and Administration Requested – Select this checkbox if using the delivered F&A or Indirect Cost rates and calculation process.

Proposal Tab continued

The screenshot shows a software interface for managing budget periods. At the top, there are fields for *Start Date (07/01/2024), *End Date (06/30/2025), and No. Periods (1), along with a 'Build Periods' button. Below this is a 'Budget Periods' section with a search bar and a 'Details' tab. A table is displayed with the following columns: Period, *Start Date, *End Date, Previous End Date, Next End Date, and Target Sponsor Budget. The first row shows Period 1 with empty date fields and navigation arrows. There are also '+' and '-' buttons at the end of the table.

Start Date – Populate with the Grants start date.

End Date – Populate with the Grants end date.

NOTE: The Start and End Dates may or may not coincide with the state fiscal year.

No Periods – Enter the number of Grants Periods between the Start and End Dates defined.

Click the **Build Periods** button to build the Grants periods based on the Start and End Date.

*Start Date 07/01/2024 *End Date 06/30/2025 No. Periods Build Periods

Budget Periods

Details EHS Incomes

Period	*Start Date	*End Date	Previous End Date	Next End Date	Target Sponsor Budget		
1	07/01/2024	06/30/2025	<	>		+	-

The Grants Periods will be built based on the **Start** and **End** Dates and the Number of **Periods**.

Click the **Projects** Tab.

Projects Tab

Proposal ID NEXT Version ID V101
Description DWSRF Currency USD

Proposal Projects [Search] | [Navigation] | 1 of 1 | View All

Project ID Primary [Add] [Remove]

*Title

Long Description
254 characters remaining

*Department Dept Contact

*Subdivision Dept Rep

*Institution [Other Contacts](#)
[Department Credit](#)

SPO SPO Contact

F & A Distribution [Search] | [Navigation] | 1-1 of 1

*Dept	Description	Location	Comments	Percent Share		
<input type="text" value="1100001"/> <input type="text"/>	Admin Services Div Operational			<input type="text" value="100.00"/>	[Add]	[Remove]

Project Percent Share 100.00

Go To: Location Protocols Component Setup Level Keywords Gender & Minority Study Trainee Attributes

Return To: [My Proposals](#)

[Save] [Notify] [Refresh] [Add] [Update/Display]

The **Projects Tab** defines details for one or more Project IDs that will be funded in this Proposal.

Project ID – Populate with the Grants Funded Project ID for this Proposal. A Grants Proposal funds one or many Projects identified by the Project ID chartfield.

NOTE: The Project ID naming convention will be specific for each agency using the Grants and Projects modules.

NOTE: Use the **Plus (+)** to insert additional Project ID's for this Proposal, if necessary.

Title – Populate a Title for each Project ID in the Proposal. The Title represents a description for the Project ID.

NOTE: See the Process Flows section of this manual for an explanation of the mapping of fields from the Proposal to the Award definition.

NOTE: If the Proposal is Awarded to a Grants Award, the Title will become the Project ID Description field shown on Project ID search pages. See the Process Flows section of this manual for an explanation of the mapping of fields from the Proposal to the Award definition.

Department /Department Contact – Select an agency Department ID and Department Contact (optional). The available values are the existing Department ID chartfield values for the agency.

Subdivision/Department Rep - Select an agency Subdivision and Department Rep (optional). The available values are the existing Department ID chartfield values for the agency.

Institution – The Institution field will represent the agency. It is the equivalent of the Grants Business Unit.

Projects page continued

*Dept	Description	Location	Comments	Percent Share		
1100001	Admin Services Div Operational			100.00	+	-
Project Percent Share				100.00		

Department – When using the F&A (Indirect Cost) feature; populate the department field with the Department ID chartfield value that will be assigned to F&A budget transactions.

Percent Share – To split F&A transactions between Department ID values, populate the Percent Share for each.

NOTE: Use the **Plus (+)** to insert additional Department ID values, if necessary.

Click the **Budgets Tab**.

Budgets Tab

The **Budgets** Tab defines Budget ID's for each Project ID in the Proposal. The budget amounts can be accessed and updated for each Budget Period in the Project for the Proposal by using the link.

Budget ID – For each Project ID in the Proposal, populate one or more Budget ID values that will be used to budget Grants amounts and track Grants costs. The Budget ID value will become the Activity ID value for the Project if the Proposal is Awarded.

NOTE: The Budget ID can be created 'Free-Form' or can be selected from a prompt list.

NOTE: See the Process Flows section of this manual for an explanation of the mapping of fields from the Proposal to the Award definition.

NOTE: Use the **Plus (+)** button to insert additional Budget IDs as necessary for the Project.

Description – enter a description for each Budget ID created.



Budget Page continued

Budget Period					
Period	Start Date	End Date	Amount	Program Income	Number of Participant/Trainees
1				Program Income	<input type="text"/>
F & A and Pricing Setup			Total		

Period – use the Period link to drill to the Budget pages where the Proposal Budget can be created. The steps to create the Proposal Budget are defined later in this section. Click the **Save** button.

Click the **F & A and Pricing Setup** link to define the Indirect Cost Budgeting Rules. You will be asked to save your work before proceeding. Click the **OK** button and click the **Save** button. If you have not filled in Location, you will be prompted to do so, then click the **Save** button.

Return to the **Budgets** Tab if you are not there.



F&A Sub-Page

GM_BUD_FA

F & A and Pricing Setup

Proposal ID: CON000000000000000000025 Version ID: V101
Description: Drinking Water Service Budget ID: TASK_1
Project ID: 00000000000000266

Institution Minus Funded Sponsor Minus Funded

Contracts Related

*Pricing Method: AS Incurred
*Product: GRANT_REIMBURSABLI

F&A Set Up

*Rate Type: []

Institution

FA Base: []

Effective Date	FA Rate %
----------------	-----------

Sponsor

FA Base: []

Effective Date	FA Rate %
----------------	-----------

Budget

FA Base: []

Effective Date	FA Rate %
*Effective Date: 11/21/2024	FA Rate %: 15.00

OK Cancel Apply

For the Project and Budget ID, define the **Product** for F&A calculations, the **Rate Type**, and **FA Bases**. The FA Base on the **Budget** section of the page is used to calculate the Proposal F&A Budget.

Click the **OK** button to return to the Budgets page.

Click the **Resources Tab**.

Resources Tab

The **Resources Tab** defines Resource Types for the Grants Project as well as additional Professionals (in addition to the Principal Investigator). Resource Types are generally used for higher education Grants.

Type – If defined, populate the Resource Type value for the Proposal Project.

Subrecipient – To track Sub-recipient activity for this Proposal Project, **select** from a pre-defined Vendor value.

NOTE: Since Subrecipients receive funding through the primary recipient (state agency) they are considered a type of vendor by the system.

Professional – Populate the individuals that will work on the Grants Funded Project. By default, the Principal Investigator (PI) populated on the Proposal page will default into this section of the page.

Use the **Details** icon in the **Professional** section to populate additional details for each Professional entered in this section of the page.



Professional Details Sub-Page

Professional Details
✕

[Help](#)

Name

Organization

Project Role

Role Type

Credentials

US Government Employee

US Government Agency

Amount Requested

Foreign Organization Employee

Description Administrative Technician

Settings

Eligible PI
 First Time PI
 PI Eligibility Waiver
 New Personnel

More Details

Address Education Job Experience	Advisor/Advisee Membership/Association Honor/Award Collaboration	Publication Pending Support Ongoing Support Completed Support
---	---	--

[Reload All](#)

Additional Information 🔍 | ⏪ | ⏩ | 1 of 1 | View All

*Type

The **Professional Details** page allows additional information to be defined or viewed for each individual assigned to the Grants Proposal Project.

Click the **OK** button to return to the Resources page.

Click the **Certifications** Tab.

Certifications Tab

The **Certifications Tab** allows the user to populate certifications applicable to the Grants Project. These certifications could be for things like “Smoke Free Environment” or “Drug Free Workplace”.

Certification Code – Select from the pre-defined list of Certification Codes.

Certification Date – Define the date that the certification is applicable.

Indicator – Indicate whether or not the certification is active.

Certified By – Define by whom the certification has been approved. Select from a list of agency employees.

Approval Date – Select the date on which the certification is approved.

Expiration Date - Select the date on which the certification expires.

Assurance/Exemption – If applicable, define these values for the certification.

Use the **Review and Status Sub-Tab** to define any certification review information.

Click the **Reports Tab**.



Location Tab

The **Location Tab** allows the user to define the physical location for each Proposal Project.

NOTE: The Location value selected here will become the Project Location when the Proposal is generated into an Award.

Location – Select the physical location value from the pre-defined list. These location values should be specific locations within the agency.

Phone/Extension/Fax – These fields are available to populate with specific values for this Grants Proposal.

Click the **Keywords** link at the bottom of the page.

Key Words Tab

Proposal ID CON00000000000000000000000025 Version ID V101
Description DWSRF

Key Word Detail

	*Keyword	Description		
1	<input type="text"/>	<input type="text"/>	<input data-bbox="1333 548 1360 583" type="button" value="+"/>	<input data-bbox="1386 548 1414 583" type="button" value="-"/>

Go To [Location](#) [Protocols](#) [Component](#) [Setup Level](#) [Keywords](#) [Gender & Minority Study](#) [Trainee](#) [Attributes](#)

The **Key Words Tab** allows the user to select from pre-defined key words or categories for the Grants Proposal. Key Words will be defined specifically for each agency and could be related to things like jurisdiction, level of effort subject category, etc.

Key Word – Select from the pre-defined list of key word values defined by the agency.

Click the **Save** button to Save the Grants Proposal and create the Proposal ID, if not already created.



Step 2: Building a Grants Proposal Budget

Navigation: Grants > Proposals > Enter Proposal Budget Detail > Find an Existing Value

Enter Budget Detail

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

Find an Existing Value

▼ Search Criteria

*Business Unit =

Proposal ID begins with

Version ID begins with

Proposal Project ID begins with

Budget ID begins with

Budget Period =

Description begins with

PI ID begins with

Sponsor ID begins with

Proposal Type =

Proposal Status =

Department begins with

Short Title begins with

Case Sensitive

Basic Search Save Search Criteria

Use the **Search Criteria** to select the Proposal for which the Budget needs to be created.

Click the **Search** button to enter the Budget Detail pages.

Alternatively,

Use the **Proposal Budgets Tab**.

The screenshot displays the 'Budgets' tab in a software interface. At the top, there are navigation tabs: Proposal, Projects, **Budgets**, Resources, Certifications, Reports, and Attachments. Below the tabs, the following information is shown:

- Proposal ID: CON00000000000000000000000025
- Version ID: V101
- Description: DWSRF
- Currency: USD

The 'Proposal Project' section shows:

- Project ID: 00000000000000000266
- Title: Drinking Water Service

The 'Budget Header' section shows:

- Budget ID: TASK_1
- Description: Task One
- Start Date: 07/01/2024
- End Date: 06/30/2025
- Include in Proposal

The 'Budget Period' section contains a table with the following data:

Period	Start Date	End Date	Amount	Program Income	Number of Participant/Trainees
1	07/01/2024	06/30/2025		Program Income	

At the bottom of the interface, there are navigation buttons: Save, Return to Search, Notify, Refresh, Add, and Update/Display. A 'Total' label is also present below the Budget Period table.

From the Maintain Proposal component, select the link for the Budget Period on the Budget page. This will direct the user to the **Budget Detail** pages.

NOTE: The Grants Proposal Budget is created and stored by the Grants Periods, Project IDs, and Budget IDs defined in the Grants Proposal.

Enter Budget Detail Page

Enter Budget Detail

Proposal	CON000000000000000000025	Currency	USD
Version	V101	Start Date	07/01/2024
Title	Drinking Water Service	End Date	06/30/2025
		<input type="checkbox"/> Modular?	

Project ID	0000000000000266	Budget Period	1
Budget ID	TASK_1	Start Date	07/01/2024
		End Date	06/30/2025
		Overall Cost Share	View F&A Rate

Details, CostShare, Justification

1-1 of 1

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share		
10				0.00	0.00	Cost Share	<input type="checkbox"/>				
Sponsor Direct				0.00	Sponsor F&A				0.00	Total Sponsor Budget	0.00
Institution Cost Share				0.00	Institution Cost Share F&A				0.00	Total Inst C/S Budget	0.00
Third Party Cost Share				0.00						Total TP C/S Budget	0.00
Total Direct				0.00	Total F&A				0.00	Total Budget	0.00

[Return To Maintain Proposal](#)

The **Budget Detail** page allows the user to define the Budget for the Grants Proposal.

The Budget Items make up the Line Items for the Budget. Grants Cost Sharing details can be entered for the entire budget or for a particular budget line item(s).

Totals are dynamically calculated at the bottom of the page for Sponsor, Institution, F&A, and Cost Share amounts.

Enter Budget Details Page continued

Enter Budget Detail

Proposal: CON000000000000000000025 Version: V101 Title: Drinking Water Service	Currency: USD Start Date: 07/01/2024 End Date: 06/30/2025 <input type="checkbox"/> Modular?
Project ID: 0000000000000266 Budget ID: TASK_1	Budget Period: 1 Start Date: 07/01/2024 End Date: 06/30/2025 Overall Cost Share View F&A Rate

Details, CostShare, Justification

Line Data
More Line Data

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share
10	EQUIPMENT	Equipment		450,000.00	450,000.00	Cost Share	<input type="checkbox"/>		
				Sponsor Direct	450,000.00	Sponsor F&A	0.00	Total Sponsor Budget	450,000.00
				Institution Cost Share	0.00	Institution Cost Share F&A	0.00	Total Inst C/S Budget	0.00
				Third Party Cost Share	0.00			Total TP C/S Budget	0.00
				Total Direct	450,000.00	Total F&A	0.00	Total Budget	450,000.00

[Return To Maintain Proposal](#)

Save
Return to Search
Notify

The **Budget Details** page allows the user to select the required, pre-defined Budget Items that make up the Grants Proposal Budget. For each Budget Item, populate the Total Direct amount field.

NOTE: If Overall Cost Share is defined for the Grants Proposal, the system will allocate the correct amounts to Agency Cost Share and Sponsor Direct costs.

Line # - the system will assign the Budget Line Numbers for each Budget Line defined.

Budget Item – Select the Budget Item(s) that make up this Grants Proposal Budget.

NOTE: Budget Items are defined by each agency. Depending on the requirements of each agency, Grants budget preparation process there could be One (1) or Many Budget Items.

Total Direct – For each Budget Line (Budget Item), define the amount of costs that will be budgeted.

NOTE: Use the **Plus (+)** to insert additional Budget Items.

To define Cost Sharing for the Grants Proposal, click the **Overall Cost Share** link.

Overall Cost Sharing Sub-Page

Overall Cost Sharing

Budget Period 1 Start Date 07/01/2024 End Date 06/30/2025

Overall Cost Sharing

Total Direct 450,000.00 Cost Share Percent 10.00
 Sponsor Direct 405,000.00 Cost Share Direct 45,000.00

Cost Sharing Distribution

Institution

*Dept 1100001 Admin Services Div Operational C/S Pct 100.00 C/S Direct 45000.00

Third Party

Description C/S Pct C/S Direct

Distribution Totals 100.00 45,000.00

OK Cancel

The **Overall Cost Sharing** page allows the user to define ‘Overall’ agency share of Grants Proposal budget amounts. The agency Cost Share can also be attributed to a Department within the Agency and/or to a Third Party entity.

Cost Share Percent – Define the agency share of proposal budget dollars by percentage. This percentage will be applied to all Budget Lines defined on the Budget Details page.

Cost Share Direct – This field can be dynamically populated by using the Cost Share Percent field or define the amount of agency Cost Share (monetary versus percentage).

Department – Define the agency Department(s) that will bear the Cost Share. The value defined here will be assigned to the Cost Share budget lines when the budget is created in the Award process.

NOTE: Use the **Plus (+)** to insert additional Department ID’s as necessary for the Cost Sharing.

C/S Percent – For each Department, define the percentage of the Cost Share that will be attributed to that Department.



C/S Direct - For each Department, define the amount of the Cost Share that will be attributed to that Department.

Description – To define a Third Party Cost Share, populate the Description for the Third Party.

C/S Percent – For each Third Party, define the percentage of the Cost Share that will be attributed to that Department.

C/S Direct - For each Third Party, define the amount of the Cost Share that will be attributed to that Department.

Click the **OK** button to return to the Budget Details page.

Enter Budget Details page continued

Enter Budget Detail

Proposal: CON000000000000000000025 Currency: USD
 Version: V101 Start Date: 07/01/2024 End Date: 06/30/2025
 Title: Drinking Water Service Modular?

Project ID: 0000000000000266 Budget Period: 1
 Budget ID: TASK_1 Start Date: 07/01/2024 End Date: 06/30/2025
[Overall Cost Share](#) [View F&A Rate](#)

Details, CostShare, Justification

Line # Budget Item Description Details Total Direct Sponsor Direct Mandatory Cost share Institution Cost Share Third Party Cost Share

10	EQUIPMENT	Equipment		450,000.00	405,000.00	<input type="checkbox"/>	45,000.00	
----	-----------	-----------	--	------------	------------	--------------------------	-----------	--

Sponsor Direct 405,000.00 Sponsor F&A 0.00 Total Sponsor Budget 405,000.00
 Institution Cost Share 45,000.00 Institution Cost Share F&A 0.00 Total Inst C/S Budget 45,000.00
 Third Party Cost Share 0.00 Total TP C/S Budget 0.00

Total Direct 450,000.00 Total F&A 0.00 Total Budget 450,000.00

[Return To Maintain Proposal](#)

[Save](#) [Return to Search](#) [Notify](#)

The **Budget Details** page displays the calculations of the Cost Share if defined. The Sponsor Direct amount reflects the Sponsor portion of the entire budget. The Institution Cost Share amount reflects the agency cost share portion of the entire budget. Total Direct amount reflects the total amount of the Proposal budget.

NOTE: Use the **Cost Share** link on the Budget Line, seen on page 29, to define agency Cost Share by Line. The mechanics of populating the Cost Share by line are the same as those for the Overall Cost Share configuration. If you define the Overall Cost Share, this link is no longer available. If you define the Line Cost Share first, the Overall Cost Share is no longer available to be changed.

Use the [View F&A Rate](#) link to see Indirect Cost configuration for this Proposal.

Click the [Save](#) button to Save the Grants Proposal Budget.

To return to the Grants Proposal pages, use the [Return to Maintain Proposal](#) link.



Awarding a Proposal

Once the Grants Proposal has been negotiated with the Sponsor, required adjustments have been made and the Proposal is ready to become a complete Grants, the Proposal must be 'Awarded' in the system. This process is also called 'Award Generation' in the system.

Step 1: Submit a Grants Proposal

Navigation: Grants > Proposals > Submit Proposals > Find an Existing Value

Submit Proposal

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

[Find an Existing Value](#)

Search Criteria

*Business Unit =

Proposal ID begins with

Version ID begins with

PI ID begins with

Sponsor ID begins with

Type =

Status =

Department ID begins with

Short Title begins with

Template Proposal begins with

Case Sensitive

[Basic Search](#)

Use the **Search Criteria** to select the Proposal that needs to be Submitted for Award.

Click the **Search** button to enter the Proposal Submission pages.

Step 2: Award a Grants Proposal

Navigation: Grants > Proposals > Generate Award > Find an Existing Value

Generate Award

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

[Find an Existing Value](#)

▼ Search Criteria

*Business Unit =

Proposal ID begins with

Version ID begins with

Empl ID begins with

Sponsor ID begins with

Proposal Type =

Proposal Status =

Department begins with

Short Title begins with

Case Sensitive

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

Click the **Search** button to retrieve the Proposal based on the Search Criteria provided.

Generate Award Page

Generate Award

From Proposal CON00000000000000000000000025 To Award CON00000000000000000000000025

From Version V101 Pre-award Spending Add to Grants Portal Security?

Project

Primary Project

From Project 0000000000000266 Drinking Water Service Project 000000000000266

Budget

	From Budget	Activity	Description
<input checked="" type="checkbox"/>	TASK_1	TASK_1	Task One

The **Generate Award** page allows the user to define how the Grants Proposal will be mapped to the Grants Award Profile.

From Proposal – This value is the existing Proposal ID.

To Award – Once the Proposal is ‘Generated’ to an Award, this value will be the Award Profile ID as well as the Grants Contract that facilitates Grants draws from the Sponsor.

Pre-award Spending – This one-time option allows the agency to create the Project ID and Activity ID ONLY to begin Grants spending (through Requisitions, Purchase Orders and Vouchers) before the Award Profile and Grants Contract is created.

From Project – This value is the Project ID from the Grants Proposal.

Project – This value will be the Project ID when the Award is Generated.

From Budget – This value is the Budget ID from the Grants Proposal.

Activity - This value will be the Activity ID when the Award is Generated.

NOTE: The **To Award**, **Project**, and **Activity** fields can be changed on this page before the **Generate** button is selected. Once the **Generate** button is selected, these values **CANNOT** be changed.

Click the **Generate** button to create the Award Profile including Grants Contract, Project(s) and Activities.

Finalize the Grants Budget

Once the Grants Proposal has been negotiated, approved, and awarded, the Grants Budget must be finalized to update the Commitment Control ledgers and the Project Costing module.

This process includes accessing the Grants Budget defined during the Proposal creation process, reviewing and updating the Budget if necessary, and Finalizing the Budget.

Grants Budgets are retrieved by the Project IDs defined in the Grants Proposal.

Step 1: Finalize the Grants Budget

Project Budgets

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

[Find an Existing Value](#)

▼ Search Criteria

*Business Unit =

Project begins with

Budget Plan ID =

Budget Period begins with

Budget Type =

Description begins with

Case Sensitive

Basic Search Save Search Criteria

Business Unit – The agency business unit value in which the Grants Project budget is stored.

Project – The Grants Project in which the budget is defined.

Click the **Search** button to enter the Budget Details pages to Finalize the Budget.

Budget Details Page

Budget Detail

Project 000000000000266 Drinking Water Service
 Budget Period 1 Begin Date 07/01/2024 End Date 06/30/2025 [Finalize](#) [Process Monitor](#)

Project Budget Summary

Cost Share Direct \$45,000.00 Currency USD Total Budget \$450,000.00
 Sponsor Budget \$405,000.00 Security Status None

Budget Amounts for Period

1-2 of 2 | View All

General | Project Detail | General Ledger Detail | Commitment Control Detail | Grants Detail

Activity	Budget Item	Begin Date	Quantity	Unit of Measure	Amount	Currency		
TASK_1	EQUIPMENT		1.00		405,000.00	USD	+	-
TASK_1	EQUIPMENT		1.00		45,000.00	USD	+	-

[Save](#) [Return to Search](#) [Notify](#)

The **Budget Details** page allows the user to review and add additional chartfield values to the Budget Lines created in the Proposal. In addition to the chartfield values defaulted into Budget Lines from the Budget Items, an agency may choose to add additional GL chartfields to the Budget Lines for reporting purposes.

NOTE: The Grants Proposal Budget is created and stored by the Grants Periods and Project ID(s) with Budget ID values also available.

Cost Share Direct – This field displays the total amount of agency Cost Share if applicable.

Total - Displays the amount of the Sponsor applicable Project Budget.

Total Budget – Displays the total amount of the Grants Project Budget.

General Tab – Use the chartfield fields on the General tab to define more chartfield values if necessary.

NOTE: Use the **Plus (+)** to insert additional Budget Rows as necessary to split budget costs. For example, to split a budget line between fiscal years (Budget Ref), insert an additional row and allocate the costs between the Budget Ref values as appropriate.

Click the **Finalize** button to finalize the Grants Project Budget and update the Commitment Control and Project Costing modules.

Use the **Process Monitor** link to view the status of the Finalization process.

NOTE: Once the Grants Project Budget has been finalized, revisions can be done through this page as well.

Copy a Proposal

When a Grants Proposal has been saved in the system, it is available to copy from when new Proposals are being developed. This would be useful when there is a new Proposal that needs much of the same content as an existing Proposal. Rather than creating the new Proposal from scratch, the existing Proposal can be used as a template to copy needed information.

This feature may be useful for Grants that are renewed each year and keep much of the same information and need only minor adjustments from year to year.

Step 1: Copy from an Existing Proposal

Navigation: Grants > Proposals > Copy Proposal > Find an Existing Value

Copy Proposal

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

[Find an Existing Value](#)

Search Criteria

*Business Unit =

Proposal ID begins with

Version ID begins with

PI ID begins with

Sponsor ID begins with

Type =

Status =

Department ID begins with

Short Title begins with

Template Proposal begins with

Case Sensitive

[Basic Search](#)

Use the **Search Criteria** to select the Grants Proposal that will be copied from.

Click the **Search** button to enter the Copy Proposal pages.



Copy Proposal Page

Copy Proposal

From Proposal	CON000000000000000000025	*To Proposal	NEXT <input type="text"/>
From Version ID	V101	To Version	NEXT
From Start Date	07/01/2024	To Start Date	07/01/2024 <input type="text"/>
From End Date	06/30/2025	To End Date	06/30/2025 <input type="text"/>

Budget Period

Budget Period	From Start Date	From End Date	To Start Date	To End Date
1	07/01/2024	06/30/2025	07/01/2024 <input type="text"/>	06/30/2025 <input type="text"/>

Project

From Project ID	0000000000000266	To Project ID	NEXT <input type="text"/>
	Drinking Water Service		
	<input checked="" type="checkbox"/> Primary Project		

Budget

Copy	From Budget ID	To Budget ID
<input checked="" type="checkbox"/>	TASK_1	TASK_1 <input type="text"/>

The **Copy Proposal** page displays information from the Proposal that will be copied from as well as details from the Proposal that will be created from the copy. The source Proposal information is labeled as “From” while the target Proposal is labeled as “To”.

From Proposal – The Grants Proposal that will be copied from.

To Version ID – This field is the version of the Proposal that will be copied from.

From Start/End Date – The Proposal’s start and end period dates from the source Proposal.

To Proposal – Use ‘NEXT’ to allow the system to assign the next available Proposal ID or populate the Proposal ID number.

To Version – Leave this field as ‘NEXT’ to allow the system to assign the new Version ID.

To Start/End Date – For the new Proposal, populate the Grants Proposal start and end dates.

Budget Period Start/End Dates – Populate the start and end dates for each Budget Period in the new Proposal.

NOTE: There can be one or many Budget Periods within the Grants Proposal.



From Project – Displays the Project(s) from the source Proposal.

To Project – For the new Proposal, allow the system to assign the next Project ID by leaving this field set to 'NEXT'. Alternatively, populate the Project ID.

NOTE: For most agencies, the Project ID will be populated by the user on this page when creating the new Proposal to comply with agency Project ID naming standards.

From Budget ID – This field displays the Budget ID from the source Proposal.

To Budget ID – This field holds the new Budget ID for the target Proposal.

Click the **Copy** button to execute the copy function and create the new Grants Proposal.

NOTE: The Copy Proposal feature will copy information from the Proposal including Descriptions, Sponsor, Professional(s), Departments, Budget Details and any other Grants Proposal properties. If changes need to be made to the target Proposal, retrieve the new Proposal and make necessary changes.

NOTE: The new Proposal will be created in 'Draft' status and will need to be reviewed, saved and submitted before it can be Awarded.

Copy a Proposal Budget

A Proposal ID, any number of its child Projects, and selected Proposal Budgets and Periods can be copied from one Proposal to another without reentering data. This feature is helpful when creating a Proposal that is similar to one that already exists in the system. In addition, a budget can be copied from one Budget Period to another within the same Proposal.

Step 1: Copy from an Existing Proposal with Budget

Navigation: Grants > Proposals > Copy Proposal Budget Period > Find an Existing Value

Copy Budget Period

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

[Find an Existing Value](#)

Search Criteria

*Business Unit =

Proposal ID CON0000000000000000

Version ID V101

Proposal Project ID

Budget ID

Budget Period =

Description

PI ID

Sponsor ID

Proposal Type =

Proposal Status =

Department

Short Title

Case Sensitive

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

Use the **Search Criteria** to select the Grants Proposal that will be copied from.

Click the **Search** button to enter the Copy Budget Period pages.

