

Oracle

Project Portfolio Management Cloud Using Grants Management

Release 12

This guide also applies to on-premise
implementations

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Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon  to access Oracle Applications Help in the application. If you don't see any help icons on your page, click the Show Help icon  in the global area. Not all pages have help icons. You can also access Oracle Applications Help at <https://fusionhelp.oracle.com>.

Using Applications Help

 **Watch:** This video tutorial shows you how to find help and use help features.

Additional Resources

- **Community:** Use [Oracle Applications Customer Connect](#) to get information from experts at Oracle, the partner community, and other users.
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1 Overview

Grants Management: Overview

Oracle Fusion Grants Management includes the creation of awards and projects to manage the funding received from sponsors to conduct research work. Create award budgets to plan and manage the financial performance of award projects. Capture and process award costs, send invoices to sponsors and recognize revenue.

The application addresses the administration and management of funding received in the form of an award. Some of the following areas receive funding from federal and nonfederal organizations to carry out research:

- Higher education organizations such as universities, colleges
- State and local government
- Not for profit organizations
- Healthcare organizations

You track the funds explicitly, bill, and report on the funding source. Additionally, you must comply with the terms and conditions and get fiscal mandates of the funding agreement.

2 Receive and Define Grant Award

Award Creation: Explained

When you create an award, you define award basic details such as the business unit, legal entity, contract type, primary sponsor, principal investigator, and award date range, which form the award basic details. When you create an award, award, a contract is automatically created in Oracle Fusion Enterprise Contracts.

❗ Important: To create a contract, you must be defined as a user in Oracle Fusion Customer Relationship Management who has the Contract Administrator resource role in the business unit of the contract. If you aren't already defined as a user in Customer Relationship Management, then your implementation administrator can identify you as a user and assign the Contract Administrator role to you from the Manage Resources task in the Setup and Maintenance work area.

You can't change the basic award details in Oracle Fusion Grants Management.

🔒 Restriction: However, you can change the award name, status, primary sponsor, and award date range in the award contract in Oracle Fusion Enterprise Contracts.

After you create an award, you define and manage the different aspects of the award:

- **Management:** Specify general award details. Add and manage award objects such as keywords, references, CFDA Numbers.
- **Financial:** Define the budget periods, funding sources, and organization credits to manage the financial transactions of the award and award projects.
- **Compliance:** Capture and manage certifications and compliance information of an institution.
- **Personnel:** Define and manage the internal and external personnel for the award or award projects.

Related Topics

- [Setting Sales Cloud Business Unit Profile Options: Procedure](#)

Creating Awards Quickly: Procedure

When you receive a grant, you can quickly create an award from an award template by using the My Awards card in the Awards work area. When you use this approach, you don't need to go through the detailed process of defining an award, award project, and award funding. The award template lets you create awards that share the common attributes and options from the template.

When you create an award from the My Awards card, define the key attributes for these award components:

- Award attributes
- Project
- Funding
- Budget

You don't need to define the other award objects such as keywords, references, attachments, funding sources, organization credits, certifications, terms and conditions, personnel, CFDA, and award descriptive flexfields when you create the award from the My Awards card. These award objects are automatically copied from the award template.

Creating the Award

Create an award from an award template and define award-specific attributes as follows:

1. In the Awards work area, click the **Create Award** button in the My Awards card.
2. In the Create Award page, enter the award name, award number, and the award duration. If the award template specifies a contract type, then the award created from that template is associated with the contract. If not, you must select the contract type.
3. Select the principal investigator.
4. If the award template is set for Letter of Credit (LOC) billing, then enter the document number. If the award template and the sponsor don't use LOC billing, then the Federal Invoice Format is automatically set to SF270.

Adding a Project

When a project template is specified in the award template, then a project is automatically created with the award name and number as the project name and number. The **Add Project** section doesn't appear in the Create Award page. If the project template isn't specified in the award template, then you can add and associate a project to the award using the following steps:

1. Select the project template.
2. Enter the project name and project number.

If the project template or contract is set to the autonumbering method, then the **Project Number** and **Award Number** fields don't appear in the Create Award page. You can create an award for the primary sponsor project only.

Adding Funding

Create the funding issued by the sponsor and the award budget. When you define the budget, you must distribute the funding amount to the top resources. You can fund an award without adding a project, however, a contract line can't be created.

1. Enter the funding number, funding date, and the direct and indirect funding amounts.
2. Create the base funding for the award using the first budget period and external funding source.

Adding a Budget

Create the award budget by distributing the funding amount to the top resources for the project.

1. Specify the budget amount for the top resources such as labor, supplies, equipment, burden expenses. Ensure that the total amount assigned to the top resources adds up to the total funding amount.
2. Click **Save and Close** to create and submit the award.

The application validates the data and creates the award and the following award objects:

- Award contract
- Award project
- Award funding
- Award budget
- Control budget

The associated contract is created to generate invoice and recognize revenue. Funding is created and allocated to the project.

To create a contract, you must be defined as a user with the Contract Administrator role in the business unit of the contract. If you aren't already defined as a user in Oracle Fusion Customer Relationship Management, then your implementation administrator can identify you as a user and assign the Contract Administrator role to you from the Manage Resources task in the Setup and Maintenance work area.

Related Topics

- [Setting Sales Cloud Business Unit Profile Options: Procedure](#)
- [Understanding Sales Resources](#)
- [How does a contract user get access to a business unit?](#)

Create Award Validations: Explained

When you create an award from the My Awards card in the Awards work area, the application validates the award, award project, award funding, and award budget data. Review and resolve any issues so you can create and submit the award.

Validations

The following table describes the critical validation points and possible solutions for each error.

Award and Award Objects	Validations	Error Resolution
Award	The award duration cannot break into the yearly periods that are specified in the award template.	<p>Change either the award duration or the number of budget periods in the award template and then create the award.</p> <p>For example, if the award has 5 yearly periods, but you want to create an award with a duration of 4 years (01/01/2016 until 12/31/2019), then you must make either one of the following changes:</p> <ul style="list-style-type: none"> • Change the length of your award to 5 years. • Modify the award template to have only 4 budget periods.
Award billing attributes	<p>The award uses the business unit specified in the award template. Ensure that the following billing attributes are defined in the business unit implementation options:</p> <ul style="list-style-type: none"> • Invoice method • Revenue method • Billing cycle • Labor format • Nonlabor format • Event format 	The Grants Application Administrator must update the business unit implementation options in the Setup and Maintenance work area.

Award and Award Objects	Validations	Error Resolution
Award sponsor attributes	<p>Ensure that the following sponsor attributes are defined:</p> <ul style="list-style-type: none"> • Default payment term • Primary bill-to site for the sponsor and account • Primary bill-to site for the related sponsor and account • Primary bill-to contact • Primary ship-to site for the customer, account, and business unit 	The Grants Application Administrator updates the sponsor details in the Manage Customers page in Oracle Fusion Trade Community Architecture.
Award project	If a project template is associated with the award template, then the award is created with a project that has the same project name and number as the award name and number.	
Award project	If the award template doesn't specify a project template, then you must select a project template and enter a unique project name and number when you create the award.	<p>Enter a unique project name and number on the Create Award page.</p> <p>A project number isn't required if the project template uses the autonumbering method.</p>
Award budget	The project template used by the award or award template has a primary planning resource breakdown structure.	Enter a primary planning resource breakdown structure on the project template that's associated with the award template.
Award budget	The financial plan type doesn't have the necessary settings to create an award budget.	<p>Ensure that a default financial plan type exists for the award and meets the following conditions:</p> <ul style="list-style-type: none"> • Is for an approved cost budget. • Is enabled for budgetary controls. • Isn't enabled for workflow approval. • Uses the award calendar type. • Is set as the default award financial plan type.
Award budget	The total budgeted amount for the resources must add up to the total funding amount.	Change the resource amounts or the funding amount.

Award Management Details: Explained

After you create an award, specify general award management details on the Manage Award Details page. Provide information such as the purpose and type of the award, CFDA numbers, keywords, references, notes and attachments, Award flexfield, and other award information.

General Information

Award management details include general details such as the purpose and type of the award. The default organization is from the principal investigator's primary organization defined in HCM.

The institution specified at the business unit implementation options is displayed in the Manage Award Details page. You can change the organization and institution, if required. Provide the sponsor award number, which is tracked by the sponsor.

CFDA Numbers, Keywords, and References

Add the CFDA numbers assigned to the award to identify the nature of federal funding received from sponsors.

Enter keywords track an award by the subject category. Associate keywords with an award, award project, and principal investigator.

Capture and assign additional references to the award or award project for identification purposes, for example, proposal number.

Other Award Information

Track other award details such as:

- Conflict of Interest
- Flow-Through Funds
- Intellectual Property
- Previous Award Details

When you specify the information for these attributes, the application indicates that data exists in the Data Present column.

 **Tip:** Use the Award flexfield in the **Additional Information** region to capture and track award attributes that are specific to your organization.

Award and Award Project Financial Details: Explained

Specify the key financial attributes of the award such as general details, budget periods, funding sources, and organization credits in the Financial tab of the Manage Award Details page.

The following table provides details of financial attributes of the award:

Award Financial Attributes	Description
Burden Schedule and Burden Schedule Overrides	<p>The source of the default burden schedule for the award comes from the award template or the sponsor or the business unit implementation options. You can change and specify the burden schedule for the award, if required.</p> <p>If you don't want the burden schedule specified at the award to be applied on award project, you can specify overrides for the award project and tasks.</p>

Award Financial Attributes	Description
Pre-Award Spending	Specify the pre-award date to track expenditures incurred before the award is formally received. The pre-award date is available if pre-award spending is allowed on the award.
Expanded Authority Spending and Restricted Authority Spending	Select the Expanded authority check box, if the award is authorized to spend across budget periods. You can't deselect this check box if budget lines exist for the award project.
Budget Periods	<p>Budget period represents the interval of time, usually twelve months, into which the duration of an award project is divided into, for budgetary and funding purposes.</p> <p>For example, certain awards have a five-year duration divided into five budget periods. Specify budget periods for the entire award duration. Budget periods must be within the award date range and contiguous.</p>
Funding Sources	Funding sources are parties that fund research for the award. The primary sponsor of the award becomes the external sponsor. Internal sponsors also fund the activity within the institution, if the award is enabled for cost sharing.
Organization Credits	<p>Organizations receive credits for the award and award project. The organization associated with the award is the default organization specified here.</p> <p>You can change or add organizations to the award and provide the credit percentage for each of them. Ensure that the total organization credit percentage is 100.</p>

Award and Award Project Personnel Details: Explained

Certain HCM personnel are identified as key members working on awards and award projects. From the grants personnel, identify the principal investigator as the primary responsible person for the research work.

Select and define the internal personnel for the award or award projects by specifying the following attributes:

- Person name
- Role. Ensure that an active principal investigator exists for the entire award duration.
- Date range
- Credit percentage. Only internal, research-oriented persons can have the credit percentage. Ensure that the total credit percentage of all persons is 100.

The external person is a contact of the customer sponsoring the award. The primary sponsor specified during the creation of the award becomes the external sponsor for the award.

Award and Award Projects Compliance: Explained

An award or award project must comply with the institution policy and conflict of interest must not exist. Institutions must be in compliance with regulatory requirements to receive federal funding.

Capture and manage certifications and compliance information of an institution in the Compliance tab of the Manage Award Details and Manage Award Projects pages.

Terms and Conditions

Terms and conditions are written stipulations, specified by the grantor, that are indicated in an agreement or contract. The grantee is obligated to conform to the terms and conditions specified by the grantor. Some of the examples include: confidentiality, intellectual property, publications, salaries, and travel.

When you specify terms for the award, define the term category and then set the condition value.

Certifications

Certifications are regulatory requirements that institutions are responsible for being in compliance with if receiving federal funding. Define certifications at the award or award project level and enter the validity period. Specify if the certification requires an expedited review or full review or none.


Specify the assurance number to indicate compliance with regulations for protecting research subjects. If you are exempt from protocol approvals, provide the exemption number.

Adding Funding to an Award: Procedure

Add funding to an award, specify the funding issue details, and then allocate the funding amount to award projects. Ensure that the award has a sponsor and budget period defined before you add funding.

To add funding for an award, do the following steps:

1. From the Manage Award Funding page, click **Add Funding**.
2. Select the budget period and funding source. You can view both the internal and external funding sources when the award is set to cost sharing.
3. Select the issue type and enter the issue number and date. The issue type can be Base or Supplement when you initially add a funding for a budget period. After you create the base funding, any subsequent funding is supplemental. You can have only one base funding for a budget period.
4. Specify the direct and indirect funding amounts for the award.

 **Restriction:** If the award has only one project, the funding is automatically allocated to the project and you can view the project in the **Project Funding Allocation** region. If the award has more than one project, then add the project and allocate the amount. You can't decrease the funding amount at the issue level beyond the amount allocated to a project. You can't allocate amounts to projects that are more than total funding amount.

5. Click **Save and Close** to review the funding allocation details.

Verify the total unallocated funding amount. The following graphs help you review the funding for an award and award projects:

- Funding Summary
- Funding Amount by Funding Source
- Allocated Funding Amount by Funding Source
- Unallocated Funding Amount
- Project Funding Details graph for all projects or a single project

Award and Award Project Validations: Explained

When you create an award and define the award attributes, the application validates certain award details. After the award details are validated, you can create and associate projects to the award and define award project attributes. The award project details are validated before you can add funding for the award.

The award, award project, and award funding validations are as follows:

- Budget periods for the award are within the award date range.
- Budget period names are unique and contiguous. They must not overlap or have a gap. If you change the award end date, you must also update the end date of the last budget period.
- The total credit percentage for all organizations adds up to 100 percent for the award.
- The total credit percentage for the internal personnel adds up to 100 percent for the award.
- One or more principal investigators can exist for the entire award duration. But at any point of time only one principal investigator must be assigned to the award.
- Certificates are valid and haven't passed the expiration date.
- The funding amount allocated to project must not exceed the total award funding amount.
- The funding issue can't be deleted if funding is allocated to a project.

 **Note:** You can't delete award internal or external projects, if a contract line, budget line, or funding exists for the award.


These validations are applicable when you create and define awards and award projects from an award template or another award.

Award Review Validations: Explained

After you create and define an award, award projects, and award funding, you can validate certain aspects of the award to complete award definition so that costs can be captured and processed. You must ensure that the award is complete and without any errors before you update the award. You can update the award contract and create contract lines only after the award is validated.

The application triggers the validation process when you click the **Validate** button in the Review Award page and checks the award for the following aspects:

- A funding exists for the budget period and funding source.
- A project is associated to the award.

 **Note:** Ensure that the project is active when you submit the award.

- Funding is allocated to an award or award project.

 **Note:** Partial allocation of funding results is allowed, however you have to allocate funding amount completely later.

- Ensure that projects assigned to the external funding source are in the Approved status

Review the errors and warnings for the award in the **Validation Results** region and fix the issues. Then update the award contract to create contract line and contract project linkages. After a contract line is created, you must update the contract only in Oracle Fusion Enterprise Contracts and not in Oracle Fusion Grants Management.

When you validate an award, a validation time stamp is created, which you can use to track when the award was last validated. If you update the award and award objects after that period, you can validate the award again by refreshing and verifying the validation results.

Import Awards Process

Import awards, award projects, award funding, and other related details from any external source to Oracle Fusion Grants Management through the award open interface tables. Enter the award data in the specified template and generate the CSV files and upload them to the Award open interface tables. The Import Awards process validates and processes the award data in award open interface tables, and any exceptions are tracked in the process output report.

You can load data to interface tables using predefined templates and the Load Interface File for Import scheduled process, which are both part of the External Data Integration Services for Oracle Cloud feature. For more information, see the Documentation tab for the Load Interface File for Import process in Oracle Enterprise Repository for Oracle Fusion Applications. The award, the related award objects, and their interface table names are as follows:

Award-Related Objects	Interface Table Names
Award	GMS_AWARD_HEADERS_INT
Award Projects	GMS_AWARD_PROJECTS_INT
Award and Award Project Keywords	GMS_AWARD_KEYWORDS_INT
Award and Award Project References	GMS_AWARD_REFERENCES_INT
Award and Award Project Certifications	GMS_AWARD_CERTS_INT
Award Terms and Conditions	GMS_AWARD_TERMS_INT
Award Federal Domestic Assistance Programs	GMS_AWARD_CFDAS_INT
Award Budget Periods	GMS_AWARD_BDGT_PRDS_INT
Award and Award Project Organization Credits	GMS_AWARD_DEPT_CRDTS_INT
Award and Award Project Personnel	GMS_AWARD_PERSONNEL_INT
Award Funding	GMS_AWARD_FUNDING_INT

Award-Related Objects	Interface Table Names
Award Funding Allocations	GMS_ AWARD_ FUND_ ALLOC_INT
Award Project Task Burden Schedules	GMS_ AWD_ PRJ_ TSK_ BRD_INT

You can import awards with or without the award-related objects, but you cannot import the award-related objects separately. If validation of award-related objects fails, you cannot import both the award and award-related objects.

From the Scheduled Processes page, select the Import Awards process and specify the following parameters:

Parameters

From Award Number

Beginning award number in the range of awards provided for importing and processing awards and award-related objects.

To Award Number

End award number in the range of awards provided for importing and processing awards and award-related objects.

Report Details

Includes the successfully imported awards and award-related objects in the report.

Import Awards Report

After the Import Awards process is complete, review the output report for the successful award data and exceptions, if any. The Import Awards process validates and creates the awards and the related award objects in Oracle Fusion Grants Management. Review the errors and warnings.

The exceptions for the invalid awards data are tracked in the report. Review the errors and warnings.

- The Report Summary section tracks the number of awards and the related award objects that were successfully imported and the awards that have failed the validations.
- The successfully imported awards and the related award objects are tracked in a separate section in the report.
- The errors and warnings for those awards and the related award objects that failed validations are tracked with reasons for the failure.

Review and correct the errors in the source spreadsheet, generate CSV files, load them into the interface table, and resubmit the Import Awards process. Repeat until you import all the required award data.

Related Topics

- [Load Interface File for Import Process](#)
- [External Data Integration Services for Oracle Cloud: Overview](#)

FAQs for Receive and Define Grant Award

How can I get access to a business unit to create an award and contract?

When you create an award, you automatically create a contract. To create contracts, you must be defined as a resource with the Contract Administrator role in the same business unit as the contract.

Your implementation administrator adds you as a resource for contracts in the Setup and Maintenance work area. Open the Manage Resources task and create a resource. Search for the person, then add the person as a resource. Select the Contract Administrator role and add an organization that's mapped to the contracts business unit.

What happens when you create an award?

A contract is automatically created for the award in Oracle Fusion Enterprise Contracts after you create an award. You can't change the basic award details in Oracle Fusion Grants Management, but you can change the following attributes in Oracle Fusion Enterprise Contracts:

- Award name
- Status
- Primary sponsor
- Start date
- End date

Where does the default burden schedule for the award come from?

The default burden schedule for the award comes from the sponsor, Grants business unit implementation options, or the award template. You can change the burden schedule for the award.

To calculate burdening, the Create Burden process first checks for the burden schedule override at the award project task. The process then checks:

- The award project
- The burden schedule specified for the award

Who is the default external contact in award personnel?

The primary contact of the sponsor becomes the default external person in the award personnel.

What's the difference between the award end date and award close date?

Award end date is when the award comes to an end.

Award close date is after the end date of the award. You can enter award transactions until the award close date. Based on the **Days to Close** business implementation option, the award close date is tracked. For example, if the Days to Close value is 90 days and the award end date is 31 December 2015, then the award close date is 31 March 2016.

What happens if the award contract numbering is automatic?

When the contract numbering is automatic, you can't enter the award number because contract number is taken as the award number. If the contract numbering is manual, then you can enter the award number and the same number is taken as the contract number.

Define the contract numbering method in the Manage Contract Types page in Oracle Fusion Enterprise Contracts.

What's cost share?

Costs that are provided additionally by internal departments or third-party contributions to assist a federally funded research project.

You can associate multiple projects to the internal funding source to indicate the different internal funding sources.

Sponsors can mandate cost sharing because of statutory or program regulations. Usually, internal costs aren't eligible for billing or overhead recovery. The internal costs are subject to the same policies governing allowable charges as other costs under the approved budget.

What's the difference between base and supplemental issues?

When you create funding for a budget period and funding source, you specify the issue type based on funding reasons. The funding source initially allocates some funding for the original issue in a budget period and is called the base issue. The additional funding for the same budget period are supplemental issues.

A funding can have only one base and many supplemental issues for a budget period.

Can the award funding amount be less than the award project budget amount?

No, the funding amount can't be less than the budget amount. Conversely, budget amount can't be more than the funding amount.

How can I update the contract line and contract project linkage?

If you already updated the award contract, then you can't modify the contract details in Oracle Fusion Grants Management. However, you can update the contract in Oracle Fusion Enterprise Contracts.

Where do bill plan attributes come from in the Update Contract window?

The default bill plan attributes of an award in the Update Contract window are defined in the grants business unit implementation options. You can change the attribute values if required.

The bill plan attributes include the invoice and revenue methods, billing cycle, payment terms, labor method, nonlabor method, and event method formats, and the LOC document number.

What happens if you submit an award?

The application validates and submits the award and updates the contract by creating a contract line and contract project linkage. You can review and change the bill plan attributes, if required.

What's the contract status of an active award?

Under amendment or active.

How are CFDA programs associated with an award?

Import CFDA programs using the Microsoft Excel import feature, or define the relevant programs and associate them to the award in the Manage Award Details page.

3 Manage Grant Award Performance

Award Cards and Award Project Cards: Explained

Key information for awards and award projects appear on cards in the Awards work area.

Award Cards

Review the **My Awards** card to gain insight on the number of active awards and their projects, and the number of projects that are overspending and underspending.

You can search for awards and sort them by the award end date and award number. Use the saved searches to view your active awards, expiring awards, and expired awards.

View award cards for the following attributes:

- Award number

 **Tip:** Click the Award Number link to review the award in the Award Overview page.

- Sponsor award number
- Sponsor name
- Principal investigator
- Award end date

Hover over the award card to view more details such as the award status, elapsed and remaining time, the number of associated projects, budget period, and budget amounts.

Award Project Cards

Award project cards with a donut graph appear in the Awards Overview page. These award projects are across your awards.

Each award project card includes a donut graph and the following attributes:

- Award project name
- Budget amount, if an approved cost budget exists for the award project.
- A donut graph, representing the total time and amount spent up to the current budget period for the award project. If the award is set to restricted authority, the donut graph represents the current budget period and the amount spent for the award project.
- The time spent, indicated in blue, and the amount spent, indicated in green.
- In the case of overspending in a project, the amount spent turns red and the consumed amount is shown in the middle of the donut graph. Click the middle of the donut graph to view the duration left for the award project to use the entire budget amount completely.
- For On Track and Underspending projects, the middle of the donut graph is left blank.

Hover over the donut graph to view further details such as the actual spent amount, monthly spending details, and the elapsed time. Review the duration and amount left for the project.

For more details, click an award link to open the Overview page and review the award and award projects.

Important Date Categories: Explained

Some of the key dates in managing an award are tracked in the Awards work area and award Overview pages. For example, if an award or award project is ending in week, it is indicated with an icon followed by the details. You can extend the end date or take the other actions before it ends.

Date Categories

Specify the categories for important dates in the Awards work area and track the important dates for your awards. The date categories for your awards and the description are as follows:

Date Category	Description
Awards or award projects	Ending in seven days
Draft Awards	Validated but the related contract is not active
Certifications	Expiring in seven days
Personnel	HCM assignment of award personnel ending in seven days

The award Overview page includes the ending and end-dated awards, projects, certifications, and personnel.

Federal Financial Report Process

The Federal Financial Report process tracks the financial information of awards and generates a report in a standard layout as specified by the federal agency. You can run this process for a single award or multiple awards within or across business units.

 **Note:** The principal investigator cannot generate the federal financial report.

Ensure that you provide the following parameters to process the award financial data and generate the report:

Parameter

Business Unit

Name of the business unit.

Award Name

Name of the award. Not required when you process multiple awards.

Sponsor

Name of the sponsor. Required when you process multiple awards. When the award uses a letter of credit, the LOC Number appears. The sponsor award number and document number are listed in the Federal Grant Number field when you process single and multiple awards, respectively.

Institution

Name of the institution. Required when you process multiple awards.

Certifying Official

Authorized person who signs on the federal financial report when submitting it to the federal agency

Report Date

Date when the report is generated and submitted to the federal agency.

Period End Date

End date of the reporting period. For example, 31 March is the end date for quarterly report.

Report Type

Type of report such as Annual, Semi-Annual, Quarterly, or Final.

You can provide the Total Recipient Share Required, Total Federal Program Income, Program Income expended in accordance with the deduction alternative, and Program Income expended in accordance with the addition alternative parameters, if available.

FAQs for Manage Grant Award Performance

What awards appear in the Awards work area?

Depending on the user role, awards and its related award projects are displayed in the Awards work area as follows.

Role	Awards and Award Projects Displayed in Awards Work Area
Grants Administrator	Awards within a business unit that are assigned to the user
Principal Investigator	Awards assigned to the user as of current date
Award Participant	Awards assigned to the user

Where do the award project cards that appear in the Awards work area come from?

Based on the actual burn rate percentage, the award project cards with a donut graph appear in the Awards work area in the following order:

- Overspending projects
- Underspending projects
- On track projects

You set the burn rate thresholds when you define the grants business unit implementation options. Award project cards aren't sorted by the overspent amount value.

What's projected spend percentage?

The projected spend burn rate is the amount currently spent, and what it will be when projected out for the remaining duration of the award. The application calculates the projected spend percentage with the following formula:

$$\text{Projected Spend Percentage} = \left(\frac{(\text{Expenses} + \text{Remaining Cost})}{\text{Budget}} \right) \times 100$$

$$\text{Remaining Cost} = \left(\frac{\text{Expenses}}{\text{Days Spent}} \right) \times \text{Remaining Days}$$

Expenses	=	Commitments	+	Actual Costs
Days Spent	=	Current Date	-	Start Date
Remaining Days	=	Current Budget Period End Date	-	Current Date

The start date is the award start date in awards that are enabled for expanded authority. In awards that aren't enabled for expanded authority, the start date is the current budget period start date.

What are the project spending statuses?

The spending statuses for award projects can be any of the following:

Project Spending Status	Description
Underspending	Award projects that are at spending risk with the assigned budget amount considering the budget spent till the current budget period.
Overspending	Award projects that are overspending the assigned budget amount considering the budget spent till the current budget period.
On track	Award projects that are spending within the threshold limit the assigned budget amount considering the budget spent till the current budget period.

How do you determine the overspending and underspending limits?

Overspending and underspending are burn rate indicators. The burn rate indicator threshold limits are specified at the business unit implementation options level, which is applicable to all the awards within the business unit.

What's the breakdown of funds consumed?

Funds consumed amount is the allocated cost comprising commitments and actual costs for the award project.

When viewing funds consumed amount for the award project, commitments from Oracle Fusion applications are tracked separately by document type, while the document types of commitments from third-party applications are grouped and shown as external commitments.

Why can't I view the financial details of an award?

You cannot view the financial details of an award in the following scenarios:

- If a project is not associated to the award
- If budget periods are not defined for the award
- If the Update Award Performance Data process is not run and award data is not yet summarized by budget period

Budget amount is available only if the current baseline budget version exists for the approved cost budget.

How can I collaborate with my research team on award-related issues?

Use the **Social** link in the awards work area to have conversations with award stake holders on award-related issues. The Social link is available if you enabled integration with Oracle Social Network Cloud Service.

Consider the following examples:

You're a principal investigator on an award conducting a research project. You have concerns on the availability of funds to procure some laboratory supplies. The issue resolution requires collaboration between the award members. You can create a conversation and invite the grants administrator and grants accountant and other members to the award discussion.

After preparing the federal financial report, the grants administrator initiates a conversation with the principal investigator of the award to review the report and provide feedback. After incorporating the suggestions, if any, the grants administrator submits the federal financial report to the sponsor.

Conversations are online discussions that include messages, comments, and documents. The conversation participants give their views, provide information, and upload documents. Information is shared as if everyone were working together in the same room.

Related Topics

- [What does social networking have to do with my job?](#)


Why don't the actual and commitment amounts of the award project map to what I budgeted?

The planning resource breakdown structure selected for creating the budget isn't the same as the primary reporting resource breakdown structure.

The planning resource breakdown structure is used for budgeting, and the reporting resource breakdown structure is used for summarizing reporting data. To compare actual and commitment amounts of the award project, you must use the same planning and reporting resource breakdown structure.

Which budget version is used for reporting financial information?

The current baseline version of the approved cost budget for the award project.

 **Tip:** To view control lines on the Overview page for the award, enable budgetary controls on the financial plan type.

What's the overspent amount for an award?

The application calculates the award project overspent amount by considering the amount spent and elapsed time in conjunction with the settings specified in the burn rate thresholds of the Manage Grants Management Business Unit Implementation Options page.

$$\text{Overspent Amount} = \text{Consumed Amount} - \left(\text{Budget Amount} \times \text{Time Spent Percentage} \times \text{Threshold Value} \right)$$

The time spent percentage is the ratio of days spent to the total number of days.

How do I define the financial plan type to create an award project budget?

Define the financial plan type to create approved cost budgets for award projects by selecting the following options:

- Set the financial plan type as the default award financial plan type
- Enable the financial plan type for budgetary controls

Don't enable workflow approval for the financial plan type.

Why are the burden costs in the Federal Financial Report different from burden expenditure item costs?

The costs that result by using a burden cost code, which is set to report as direct cost in the Federal Financial Report, are different from the expenditure item cost.

For example, you can track fringe benefits for salary as direct costs. Hence, burden costs which have the burden cost code specified to report as direct cost are tracked as the direct cost in the Federal Financial Report.

How can I track the burden cost as direct cost in the Federal Financial Report?

Specify the burden cost code to report the cost as direct cost in the **Manage Burden Cost Codes** page. This burden cost is reported as direct cost in the Federal Financial Report in Oracle Fusion Grants Management. However, this is stored as burden cost in all other pages of the application.

Glossary

CFDA Number

Abbreviation for Catalog of Federal Domestic Assistance Program Number. A database of all federal programs available to state and local governments, including the District of Columbia, federally recognized Indian tribal governments, territories, and possessions of the United States as well as domestic, public, and private profit and nonprofit organizations and institutions, specialized groups, and individuals.

conflict of interest

Conflict complies with the policy of the institution. Grants personnel are indicated if the person completed the conflict of interest review.

exemption number

An exception given to the award and award project certifications to be exempt from protocol approvals. Exemption number indicates that the research involves minimal risk and meets criteria specified by federal regulations.

expanded authority spending

Award funding authorized to spend budget across budget periods. Funds are carried over from one period to another.

flow-through funds

Awards given to subrecipients from federal or nonfederal agencies. Amount funded to the primary award that is associated with the subaward.

funding sources

External or internal entity providing the financial support to conduct research projects.

institution

A higher-level internal entity receiving grants and awards to conduct research projects.

LOC

Acronym for Letter of Credit. A mechanism to request cash from various federal agencies based upon disbursements. Grantees are provided a single letter of credit with each of the sponsoring agencies.

organization credit

Credit percentage an organization receives either at the award or award project level.

pre-award spending

Award funding authorized to spend the budget for expenditures incurred even before the award is formally received. Award grantees may establish a fund and incur costs up to 90 days in advance of the anticipated start date of the award.

principal investigator

A qualified person designated by an applicant institution to direct a research project or program and who usually writes the grant application. Attends to scientific and technical aspects of a project. The primary responsible person for research work.

restricted authority spending

Award funding authorized to spend budget within the budget period. Funds are not carried over from one period to another.