

SECTION 6: Grants

SECTION 6: Grants..... 6-1

NAVIGATION QUICK REFERENCE 6-2

GRANT PERSONNEL INQUIRY FORM (FRIPSTG) 6-3

GRANT INCEPTION TO DATE FORM (FRIGITD) 6-4

GRANT TRANSACTION DETAIL FORM (FRIGTRD)..... 6-6

GRANT BUDGET CODES INQUIRY FORM (FRIBUDG)..... 6-7

GRANT BUDGET TOTALS FORM (FRIBUTG) 6-8



GRANT BUDGET DISTRIBUTION INQUIRY FORM (FRIBDSG) 6-9

GRANT EVENT INQUIRY FORM (FRIEVNG) 6-10



GRANT EVENT ACTION FORM (FRAEVNG) 6-11



About These Instructions

- The [Enter] key and the [Tab] key are interchangeable – most of the time.
- **The mouse can be used – most of the time – to move from field to field.** The instructions use the [Tab] key to move from field to field. Remember, in some situations the use of the [Tab] key is required.
- **A NEXT BLOCK function** can be performed a number of ways.
 1. Click on Block on the menu bar, and then click on Next.
 2. Click on a > caret if it is visible on the bottom left corner of the screen.
 3. Press the [Control] and [Page Down] keys simultaneously.
 4. If the I-beam is visible, click on the area of the form that represents the **NEXT BLOCK**.
 5. Click on the **NEXT BLOCK** icon 
- **A NEXT RECORD function** can be performed two ways:
 1. Click on Record on the menu bar, and then click on Next.
 2. Press the [] key.
 3. Click on the **NEXT RECORD** icon 

A Query can be performed in a couple of ways.

- **ENTER QUERY**
 1. Click on Query on the menu bar, and then click on Enter.
 2. Click on **ENTER QUERY** icon 
 3. F7 on the keyboard.
- **EXECUTE QUERY**
 1. Click on Query on the menu bar, and then click on Execute.
 2. Click on **EXECUTE QUERY** icon 
 3. F8 on the keyboard

See the Navigation section of this manual for additional information.

Accounting Periods

- 01 July
- 02 August
- 03 September
- 04 October
- 05 November
- 06 December
- 07 January
- 08 February
- 09 March
- 10 April
- 11 May
- 12 June

Grant Inception to Date Form (FRIGITD)

Purpose: The **Grant Inception-to-Date form (FRIGITD)** displays account information including adjusted budget, actual inception to date activity, encumbrance activity, and available budget for an award.

Required Fields: in the header block are:

COA: Chart of Accounts - defaults with 1

Grant: Grant Code
Fund: Fund Code
Orgn: Organization Code

Optional Fields: in the header block are:

FOAPAL String: These codes can be entered to narrow a query to a specific FOAPAL string or left blank to retrieve information for the entire grant.

Code	T	Desc	Adj Budget	Activity	Commitment	Avail Bal
6129	L	Reimbursed \$	10000.00	-5000.00	0.00	15000.00
6131	L	Admin-FT Exe	0.00	106000.00	0.00	-106000.00
7181	E	Lab & Instru	70000.00	10000.00	0.00	60000.00
7182	E	Lab & Instru	0.00	0.00	0.00	0.00
7811	E	Indirect Cos	1000.00	67630.00	0.00	-66630.00
7831	E	Cost Sharing	-35000.00	-5000.00	0.00	-30000.00
Net Total:			46000.00	173630.00	0.00	-127630.00

Date Range: If the information requested is only for a specific date range, enter the range here to narrow the information displayed in the display block.

View Options:

The information displayed in the display block can be viewed in a couple of different ways by marking the box next to the appropriate view title.

Fund Summary: displays information on all funds the grant is linked to. A list of the Fund Code along with the Fund description is provided with the account information for that fund.

Sponsor Account: displays the information according to the Sponsor's Account Code structure. This feature is not in use at WPI at this time.

Hierarchy: displays the information for a higher level Fund, Organization, and Program Code. This feature will be rarely used.

Grant Transaction Detail Form (FRIGTRD)

Purpose: The **Grant Transaction Detail Form (FRIGTRD)** is a “query only” form which displays a detailed list of transactions for the selected account or accounts for the grant.

Required Fields: in the header block

COA: Chart of Accounts – defaults with 1.

Grant: Grant Code



Fund: Fund Code

Orgn: Organization Code

Optional Fields: in the header block

FOAPAL: Any information entered into the FOAPAL string fields will narrow the search or information displayed in the display block.

To display the

information for the criterion entered in the header block, perform a  **NEXT BLOCK** function then  **EXECUTE QUERY**.


If you wish to narrow the query down even further, criteria may be entered in the display block in the appropriate column. For example, if you want to see all invoices for \$100, enter INNI (type code for Invoices) in the Type Column or I% (% is the wildcard in Banner) in the Document Column (for all invoices) and \$100 in the Amount Column. Then perform the


 **EXECUTE QUERY** function.

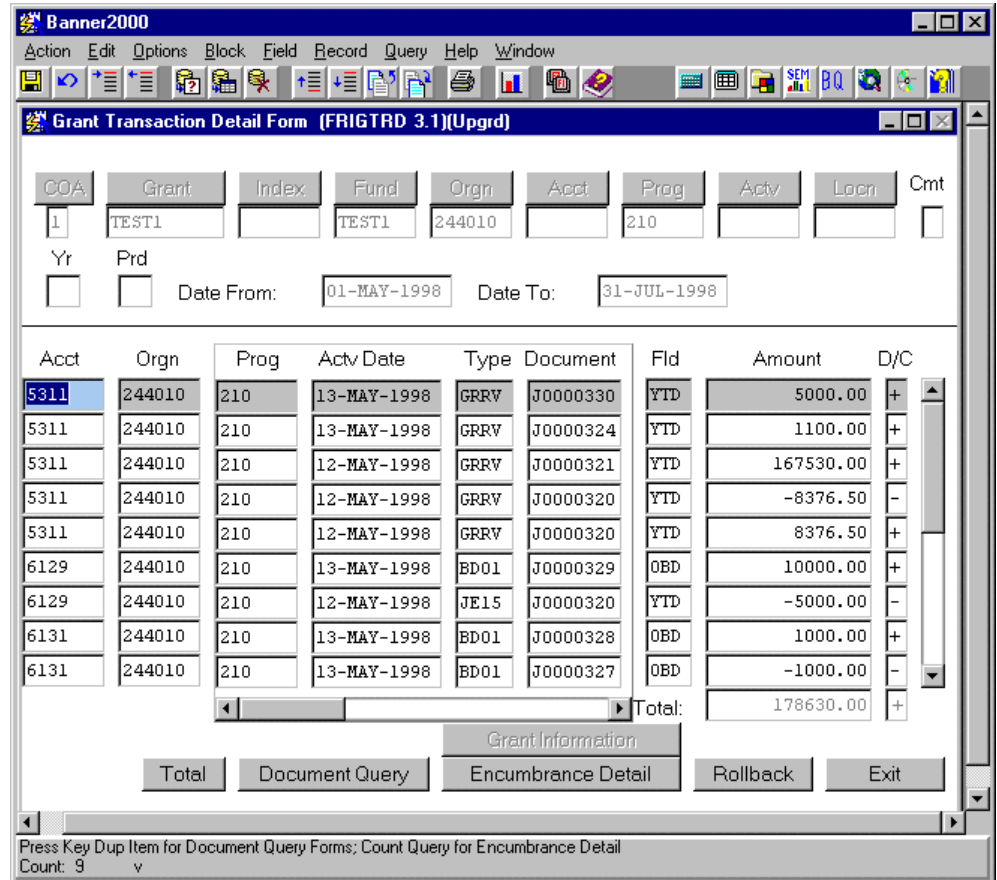
Use the horizontal scroll bar to view Program, Activity Date, Type, Document Number, Description, Fund, Activity,

Location, and Transaction Date information.

Drill Down Buttons:

The  button links to the **Document Retrieval Inquiry Form (FGIDOCR)**.

The  button links to the **Detail Encumbrance Activity Form** which is currently unavailable.



Acct	Orgn	Prog	Actv	Date	Type	Document	Fld	Amount	D/C
5311	244010	210		13-MAY-1998	GRRV	J0000330	YTD	5000.00	+
5311	244010	210		13-MAY-1998	GRRV	J0000324	YTD	1100.00	+
5311	244010	210		12-MAY-1998	GRRV	J0000321	YTD	167530.00	+
5311	244010	210		12-MAY-1998	GRRV	J0000320	YTD	-8376.50	-
5311	244010	210		12-MAY-1998	GRRV	J0000320	YTD	8376.50	+
6129	244010	210		13-MAY-1998	BD01	J0000329	OBD	10000.00	+
6129	244010	210		12-MAY-1998	JE15	J0000320	YTD	-5000.00	-
6131	244010	210		13-MAY-1998	BD01	J0000328	OBD	1000.00	+
6131	244010	210		13-MAY-1998	BD01	J0000327	OBD	-1000.00	-
Total:								178630.00	+

Grant Budget Codes Inquiry Form (FRIBUDG)



Purpose: The **Grant Budget Codes Inquiry Form (FRIBUDG)** displays budget information associated with a grant.

Required Fields: No key is necessary to perform a query although you may want to perform a query to locate a specific award.

Optional Fields: Use these fields if you wish to narrow the query to a specific award or budget code. An award that spans more than one year may have only one grant code but multiple budget codes, one for each year of the award. For example a

National Science Foundation award may be for three years, each year having a separate budget. The award would be created with one grant code but with three budget codes.

Grant	Title	Budget	Description
213050	Student Projects at Go	CURR	Current Year Budget
213050	Student Projects at Go	YR1	Year 1 Budget Adjustment
213050A	Student Projects at Go	TOTAL	Total Budget
213050B	Student Projects at Go	TOTAL	Testing Nasa B
213050C	Student Projects at Go	TOTAL	Test Nasa C Budget
213050E	Student Projects at Go	TOTAL	Testing Nasa E
213050F	Student Projects at Go	TOTAL	Testing Nasa F

Perform an  **ENTER QUERY** function to enter the criteria for the following areas, then  **EXECUTE QUERY** to display the requested information.

Grant: Grant Code

Budget: Budget code associated with the grant budget.

Use the scroll bar to view Budget Description, Proposal & Description, Proposal Budget & Description, Chart of Accounts, Project Value, Type, Begin and End Dates.

Grant Budget Totals Form (FRIBUTG)

Purpose: The **Grant Budget Totals Form (FRIBUTG)** displays grant budgets by account code or account type.

Required Fields: in the header block

A query is performed by entering values for the following:

Grant: Grant Code

Budget: Budget Code

List of Value (LOV) buttons are located on the form to assist in obtaining the correct value.

Optional Fields: in the header block

The screenshot shows the Banner2000 application window titled "Grant Budget Totals Form (FRIBUTG 3.1)(Upgrd)". The header block contains the following fields:

- Grant: TEST1 (Testing this stuff)
- Grant Budget Code: CURR (Current Year Budget 1998)
- Display By: Institution, Sponsor, ATYP Level 2, ATYP Level 1

The main data table is as follows:

Account Code/Type	Title	Proposed Budget	Cost Sharing	Project Value
6131	Admin-FT Exempt	1,000	0	1,000
7182	Lab & Instructional	1,125	375	1,500
7811	Indirect Cost	100	0	100
Totals:		2,225	375	2,600

Buttons for "Rollback" and "Exit" are located at the bottom right of the form. The status bar at the bottom indicates "Count: *3".

Use the Display By indicators to specify the query.

By Institution means by Account Codes specific to WPI.

By Sponsor is currently not in use by WPI.

By ATYP Level 2 and ATYP Level 1 means by account type and will be used only when information by expense category (i.e. Salaries, Supplies/Materials, etc.) is required.

Perform a  **NEXT BLOCK** function to display requested information.

Grant Event Inquiry Form (FRIEVNG)


Purpose: The **Grant Event Inquiry Form (FRIEVNG)** displays assigned events by User ID. Events can be anything from a technical report due date to a special task to be met.





Required Fields: in the header block

User ID: This is your login name. There is no List of Values available for use even though the button is there. This is to protect the security of login names.

Optional Fields: in the header block

Grant: Grant Code

Once the criteria has been entered, perform a  **NEXT BLOCK** function to move to the display block.

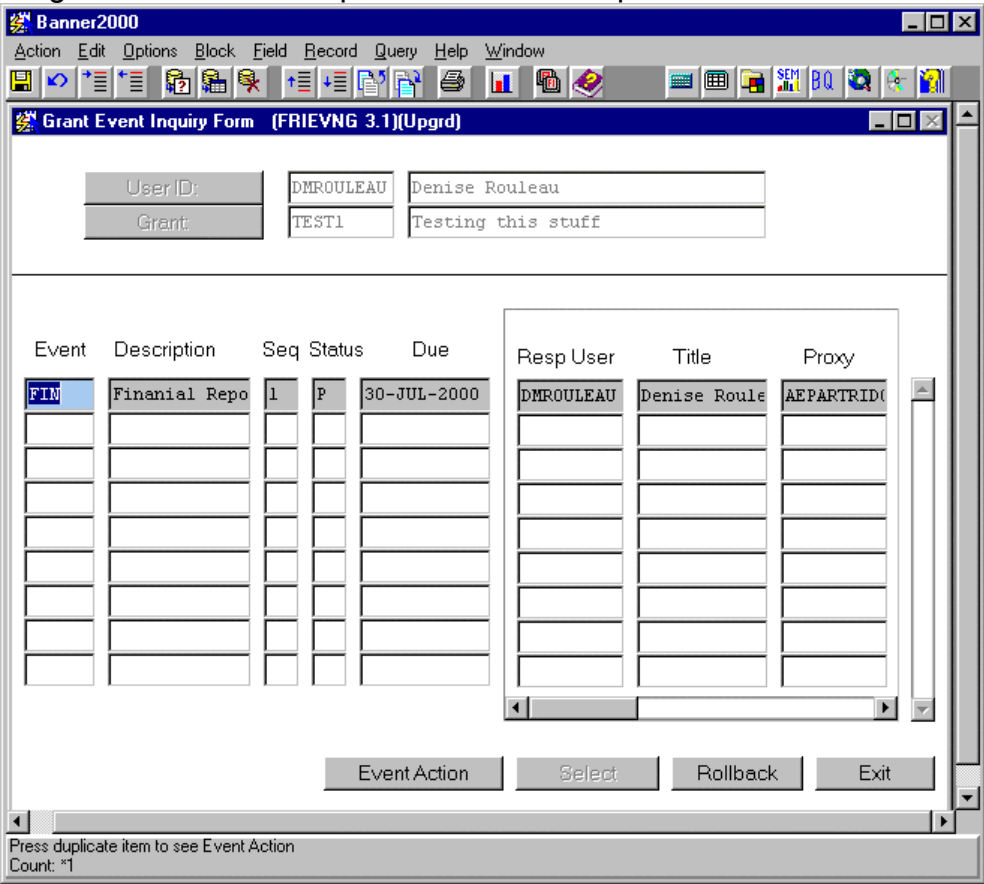
A query may be performed in the display block to narrow down the information retrieved. To do this you must perform an  **ENTER QUERY** function, then enter the information in the correct column, then  **EXECUTE QUERY**. For example, you only want to see the events that are pending.  **ENTER QUERY**, enter **P** in the Status column, and  **EXECUTE QUERY**.

The Status Indicator can be P - Pending, S – Satisfied, or C – Cancelled.

Use the horizontal scroll bar to view the Responsible User (or the person to complete the task), User Name, Secondary User (or back up person), Approved by, Date Satisfied or Cancelled, Grant Code, and Description.

Drill Down Buttons:

The **Event Action** button links to the **Grant Event Action Form (FRAEVNG)**.




Grant Event Action Form (FRAEVNG)

Purpose: Once an event is satisfied, the user will use the **Grant Event Action Form (FRAEVNG)** to indicate the completion of the event. Changing the Status to S - Satisfied and saving the change will update the information on the Grant Event Inquiry Form (FRIEVNG).

Required Fields: in the header block

Grant Code: Enter the grant code for the grant which the event is tied to.

Once the grant code is entered,  **NEXT BLOCK** will move you to the display field so that the status may be updated.

In the display block you can update the **Status** to S – Satisfied along with the **User ID** of the person approving the update and the **date** the event is satisfied.

Research Accounting must do the cancellation of an event.

Remember to SAVE your changes to the event.

Banner2000

Grant Event Action Form (FRAEVNG 3.1)(Upgrd)

Grant Code: TEST1 Testing this stuff

Seq#: Event: Due Date:

Responsible User ID:

Status: Approved By: Date:

Seq#: Event: Due Date:

Responsible User ID:

Status: Approved By: Date:

Seq#: Event: Due Date:

Responsible User ID:

Status: Approved By: Date:

Text Rollback Save Exit

No Pending events exist for this Grant.
Count: *0