

Oracle® Grants Proposal

User's Guide

Release 11i

Part No. A85295-03

May 2003

Oracle Grants Proposal User's Guide, Release 11i

Part No. A85295-03

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Send Us Your Comments

Oracle Grants Proposal User's Guide, Release 11*i*

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Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

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Preface

The *Oracle Grants Proposal User's Guide* provides information on how to use Oracle Grants Proposal.

The following sections are included in this preface:

- [Audience for this Guide](#)
- [Conventions](#)
- [Documentation Accessibility](#)
- [Other Information Sources](#)
- [Navigation Paths](#)
- [Training and Support](#)
- [Do Not Use Database Tools to Modify Oracle Applications Data](#)
- [About Oracle](#)
- [Documentation Sales](#)
- [Feedback](#)

Audience for this Guide

Welcome to Release 11*i* of the Oracle Grants Proposal User's Guide.

This guide assumes users have a working knowledge of the following:

- principles and customary practices of the business area
- Oracle Grants Proposal

Oracle suggests that users who have never used Oracle Grants Proposal attend one or more of the Oracle Grants Proposal training classes available through Oracle University.

- Oracle Applications graphical user interface

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See [Other Information Sources](#) for more information about Oracle Applications product information.

Conventions

The following conventions are observed:

- special conventions
- usage conventions
- references

Special Conventions

The following special conventions are observed:

bold	Bold type denotes buttons or menu paths, as in the following example: Submit and File - New - Open
UPPERCASE	Uppercase text denotes Oracle keywords, statements, and statuses, as in the following example: CONFIRMED
Courier	Courier font denotes a mathematical formula, as in the following example: $2\% / (100\% - 2\%) \times 360 / ((30 - (10 - 0)) = 0.367$
<>	Angle brackets denote a user-selected value, as in the following example: <Pagebreak 1>
[]	Square brackets denote a description that assists the user, but is not actually a part of the application, as in the following example: [field not available]
Note:	Notes alert users to the following type of information in this guide: Note: Notes alert users to key points to consider when using a feature.
WARNING:	Warnings alert users to the following type of information in this guide: WARNING: Warnings highlight text that warns of actions that could result in loss of data or incorrect processing.

Usage Conventions

The following usage conventions are observed:

Attach file	Indicates that users should click the Attachment icon to attach a document to a record. For information on attachments, see About Attachments and Attachments Window, <i>Oracle Applications User's Guide</i> .
Close the window.	Indicates users should close the window using either the File - Close Form command or by clicking on the x in the upper right-hand corner. Note: The File - Close Form command produces different results depending on the product and platform in use. For example, sometimes it closes only one window; at other times, it closes all open windows. Users must familiarize themselves with how the command behaves in their own environments.
Descriptions of Graphics	Textual descriptions accompany all graphics that appear in this guide. Screen shot fields are described in the accompanying window description tables.
Query appropriate data.	Indicates users should query data in the window using View - Find or View - Query By Example - Enter . For information on entering and querying data, see Entering and Querying Data, <i>Oracle Applications User's Guide</i> .

References

All references to specific chapters refer to chapters in this guide unless otherwise noted.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at

<http://www.oracle.com/accessibility/>

Other Information Sources

Users can choose from many sources of information, including online documentation, training, and support services, to increase their knowledge and understanding of Oracle Grants Proposal.

When this guide refers to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Enhancements are added to this product regularly. Information presented here may be superseded by subsequent updates to online help. If there is a discrepancy between product functionality and the online help describing it, ensure that the system administrator has installed the most current updates to online help.

MetaLink

Oracle MetaLink is Oracle Support Services' premier web support service and offers technical support, information, and a wide variety of product documentation online. Included on the MetaLink site are new release features, user's and administrator's guides, error message manuals, eTRMs (electronic technical reference manuals), upgrade information, and articles on product functionality, current issues, setup and installation, and troubleshooting.

MetaLink is available at <http://metalink.oracle.com/>.

Online Documentation

All Oracle Applications documentation is available online in HTML or PDF.

- **Online Help** - The new features section, located in the product overview chapter in the HTML help, describes new features in 11*i*. This information is updated for each new release of Oracle Grants Proposal. The new features section also includes information about any features that were not yet available when this guide was printed. For example, if the system administrator installs software from mini-packs or an upgrade, this section describes the new features.

Online help patches with the latest help are available on MetaLink.

- **11i Features Matrix** - This document lists new features available by patch and identifies any associated new documentation. The new features matrix document is available on MetaLink.

-
- **About Oracle Grants Proposal Document** - Refer to the About Oracle Grants Proposal document on MetaLink to learn about new documentation or documentation patches available for download.

Related User's Guides

Oracle Grants Proposal shares business and setup information with other Oracle Applications products. Users may want to refer to other user's guides when setting up and using Oracle Grants Proposal.

Read the guides online by choosing Library from the expandable menu on the HTML help window, by reading from the Oracle Applications Document Library CD included in the media pack, or using a Web browser with a URL provided by the system administrator.

Purchase printed guides, if required, from the Oracle Store at <http://oraclestore.oracle.com>.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface available with this release of Oracle Grants Proposal and any other Oracle Applications products. This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

Access this user's guide by choosing Getting Started with Oracle Applications from any Oracle Applications help file.

User's Guides Related to this Product

This guide contains references to the following Oracle publications.

- *Oracle Applications Flexfields Guide*
- *Oracle Applications System Administrator's Guide*
- *Oracle Applications User's Guide*
- *Oracle e-Commerce Gateway User's Guide*
- *Using Oracle HRMS - The Fundamentals*
- *Managing People Using Oracle HRMS*

-
- *Oracle Public Sector Receivables User's Guide*
 - *Oracle Grants Accounting User's Guide*
 - *Oracle Projects User's Guide*
 - *Oracle Workflow Guide*

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications, Release 11*i*. It is a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks needed to complete an installation. Use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide when upgrading Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. To upgrade to Release 11*i*, users must be at Release 10.7, in NCA, SmartClient, or character mode, or Release 11.0. Users cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to run various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. The guide contains how-to steps, screenshots, and other information needed to run the AD utilities. This guide also provides information on maintaining the Oracle Applications file system and database.

Oracle Applications System Administrator's Guide

The guide provides planning and reference information for the Oracle Applications system administrator. The guide contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface (UI) described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help users build custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the UI standards followed by the Oracle Applications development staff. It describes the UI for Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11i. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide explains how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Oracle Grants Proposal implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps users convert data from existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on MetaLink.

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with other systems. The guide includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

The manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with other systems. The guide includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes all Oracle Applications messages. The guide is available in HTML format on the documentation CD-ROM for Release 11*i*.

Navigation Paths

Navigation paths for windows in Student System are documented for the system as they are shipped. If responsibilities are changed after installation, the documented navigation paths may not be correct.

Training and Support

Training

Oracle offers a complete set of training courses to help users and their staffs master Oracle Grants Proposal and reach full productivity quickly. These courses are organized into functional learning paths, so users take only those courses appropriate to their jobs or areas of responsibility.

Users have a choice of educational environments. They can attend courses offered by Oracle University at any one of our many Education Centers, or can arrange for our trainers to teach at their facility, or can employ the Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet users' needs. For example, users can employ their own organizational structure, terminology, and data as examples in a customized training session delivered at their own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information needed to keep Oracle Grants Proposal working for all users. This team includes the technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in users' specific business areas, managing an Oracle server, and users' hardware and software environments.

Do Not Use Database Tools to Modify Oracle Applications Data

We STRONGLY RECOMMEND that users never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications tables, unless otherwise instructed.

Oracle Corporation provides powerful tools users can employ to create, store, change, retrieve, and maintain information in an Oracle database. But if users employ tools such as SQL*Plus to modify Oracle Applications data, they risk destroying the integrity of the data and lose the ability to audit changes to the data.

Because Oracle Applications tables are interrelated, any change made using Oracle Applications can update many tables at once. But when users modify Oracle Applications data using anything other than Oracle Applications, users might change a row in one table without making corresponding changes in related tables. If the tables get out of synchronization with each other, users risk retrieving erroneous information and unpredictable results throughout Oracle Applications.

When users employ Oracle Applications to modify the data, Oracle Applications automatically checks that the changes are valid. Oracle Applications also keeps track of who changes the information. But if users enter information into database tables using database tools, users can store invalid information. Users also lose the ability to track who has changed the information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources, and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers, and personal digital assistants, enabling organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

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Support sales contact information by region and country is available at <http://www.oracle.com/support/index.html?contact.html>.

Feedback

Thank you for using Oracle Grants Proposal and this user's guide.

Oracle values comments and feedback. At the end of this guide is a Reader's Comment Form that users can employ to explain what they like or dislike about Oracle Grants Proposal or this user's guide. Mail comments to the following address or call us directly at (650) 506-7000.

Oracle Public Sector Applications Documentation Manager

Oracle Corporation

500 Oracle Parkway

Redwood Shores, CA 94065

U.S.A

Or, send electronic mail to appsdoc_us@oracle.com.



Process Overview

This chapter provides a process overview of the self service version of Oracle Grants Proposal. The following sections are in this chapter:

- [Oracle Grants Proposal](#)
- [Benefits](#)
- [Overview](#)

Oracle Grants Proposal

Grants Proposal is a public sector application that provides organizations with the ability to completely track proposal activities from project inception through proposal submission to a sponsor and subsequent creation of awards and award budgets in Grants Accounting if the proposal is funded.

Benefits

Grants Proposal offers several benefits to users. Installing, implementing, and using one proposal system eliminates duplication of data entry, which increases the efficiency of proposal activities, while minimizing human error. In addition, Grants Proposal maintains the highest level of proposal access security and allows users to route proposals electronically for review and approval using Oracle Workflow. When a proposal is funded, users can create awards and award budgets in Grants Accounting using existing information from Grants Proposal.

Overview

With Grants Proposal, users create proposals easily by entering basic proposal data, defining budgets, creating narratives, routing proposals for internal approval, printing reports, submitting proposals to sponsors, recording sponsor action, and creating awards and award budgets in Grants Accounting.

The Grants Proposal development process includes the following activities:

- [Creating Proposals](#)
- [Entering Proposal Information](#)
- [Defining Proposal Budgets](#)
- [Creating Narratives](#)
- [Maintaining a Checklist](#)
- [Submitting Proposals for Internal Approval](#)
- [Printing Proposal Forms](#)
- [Accessing Proposals from Workflow](#)
- [Submitting Proposals to Sponsors](#)
- [Recording Sponsor Action](#)
- [Creating Awards and Award Budgets in Grants Accounting](#)

Creating Proposals

Users create a new proposal by entering a set of required fields and saving the record. Alternatively, they can create a new proposal by copying an existing one.

Entering Proposal Information

Once a proposal is created, users can optionally proceed to enter detailed information, which includes basic proposal information and detailed data on the funding opportunity, personnel and their roles, special reviews, research subjects, and assurances. Additional data entered includes user comments, descriptive paragraphs of text, including abstracts, and keywords.

Defining Proposal Budgets

At any time during proposal development, users can optionally choose to define proposal budgets. Users can create budgets for a single or multiple budget periods. Proposal budgets can be entered at the period level or at the budget line level. If desired, users can choose whether to apply overhead, employee benefits, and inflation rates to the proposal budget.

Creating Narratives

At any time during proposal development, users can prepare narratives using any word processing system and then attach them to in-progress proposals. Narratives are divided into one or more sections called narrative modules.

Maintaining a Checklist

Users can indicate completion or nonapplicability of proposal components by selecting the appropriate check boxes.

Submitting Proposals for Internal Approval

Once a proposal is complete, users can route it to internal approvers for review and approval.

Printing Proposal Forms

Users can print proposals on sponsor-specific PHS 398, PHS 2590, or PHS 398 (Modular) forms.

Accessing Proposals from Workflow

Users can access Workflow notifications by clicking the Worklist link in the Main menu. While reviewing a notification that requires approval, approvers can optionally click a link to view a proposal.

Submitting Proposals to Sponsors

After a proposal is internally approved, it can be submitted to the appropriate sponsor as printed copies (PHS 398, PHS 2590, or PHS 398 Modular) or electronically via 194 Transaction Set.

For information on electronic proposal submission, see [Electronic Proposal Submission](#), *Oracle Grants Proposal User's Guide*.

Recording Sponsor Action

After a sponsor reviews a proposal, users can record action taken by the sponsor, including whether or not the proposal has been funded. Optionally, users can enter funding detail information.

Creating Awards and Award Budgets in Grants Accounting

After sponsors fund or anticipate funding proposals, users can use existing proposals and proposal budgets in Grants Proposal to create awards and award budgets in Grants Accounting for funds management.

Introduction

This chapter describes how the *Oracle Grants Proposal User's Guide* is organized. The following sections are in this chapter:

- [Overview](#)
- [Setting Up Oracle Grants Proposal](#)
- [Processes and Reports](#)
- [Topical Essays](#)
- [References](#)

Overview

The Oracle Grants Proposal User's Guide contains information needed to understand and use Oracle Grants Proposal.

This guide is divided into the following parts:

- Setting Up Oracle Grants Proposal
- Processes and Reports
- Topical Essays
- References

WARNING: Enhancements are added to this product regularly. Information presented here may be superseded by subsequent updates to online help. If there is a discrepancy between product functionality and the online help describing it, ensure that the system administrator has installed the most current updates to online help.

Setting Up Oracle Applications

Implementation of Grants Proposal requires setup of Oracle Applications System Administration, Oracle Human Resource Management Systems, and Oracle Public Sector Receivables. Oracle Projects is required if Grants Accounting is implemented.

The *Oracle Grants Proposal User's Guide* provides a checklist for setup of System Administration, Human Resource Management Systems, Receivables, Grants Proposal, and Projects, and describes the setup steps that are required for Grants Proposal.

The following guides must be used with the *Oracle Grants Proposal User's Guide* to set up Oracle Applications:

- *Oracle Applications Flexfields Guide*
- *Oracle Applications System Administrator's Guide*
- *Oracle Applications User's Guide*
- *Oracle Public Sector Receivables User's Guide*
- *Oracle Human Resources North American User's Guide*
- *Oracle Grants Accounting User's Guide*
- *Oracle Projects User's Guide*

- *Oracle e-Commerce Gateway User's Guide*

Setting Up Oracle Grants Proposal

Detailed descriptions of setup steps required for implementation of Grants Proposal are included in this guide.

Setup should be reviewed annually, or as needed, to update system security, reflect changes in the organization's structure, or accommodate new requirements.

The following setup chapters describe how to set up Grants Proposal:

- Oracle Grants Proposal Setup Overview
- Implementation Options Setup
- Proposal Roles Setup
- Budget Setup
- Questions Setup
- Maps Setup
- Business Rules Setup
- Organization Details Setup
- Biographical Sketch Setup
- Keywords Setup

Processes and Reports

The following chapter describes how to run processes and generate reports:

- Processes and Reports Procedures

Setting Up Oracle Grants Proposal

This section describes the setup procedures in Grants Proposal.

Implementation of Grants Proposal also requires setup of several Oracle Applications products.

Oracle Grants Proposal Setup Overview

The Oracle Grants Proposal setup overview checklist is used as a guide for setup of Grants Proposal. Refer to this checklist for the suggested order to perform each setup step.

Information on the Grants Proposal setup checklist is provided in the following chapter:

- [Oracle Grants Proposal Setup Overview](#), page 3-1

Implementation Options Setup

Implementation options is a setup procedure used to perform the following tasks:

- specify the method of assigning a unique number to a proposal
- specify the expenditure category or expenditure type that the user wants overhead amounts transferred to in Oracle Grants Accounting if Grants Accounting is installed

Details on setting up implementation options are provided in the following chapter:

- [Implementation Options Setup](#), page 4-1

Proposal Roles Setup

A proposal role is a user-defined functional title that is associated with system-defined proposal rights. Proposal roles with their associated rights restrict individuals' access to one or more parts of a proposal.

Details on setting up proposal roles are provided in the following chapter:

- [Proposal Roles Setup](#), page 5-1

Budget Setup

Set up budget is a setup procedure used to define rate classes, rate types, and rates; assign expenditure categories to budget categories, assign expenditure categories to rate class and rate type pairs, and define a budget hierarchy.

A rate, also known as a cost rate, is a percentage that is used to calculate indirect costs for research proposal budgets.

Details on setting up budgets are provided in the following chapter:

- [Budget Setup](#), page 6-1

Questions Setup

Users set up questions that relate to assurance, compliance, and certification issues by sponsors. Many sponsors require that responses to these questions be included with the proposal before funding is considered. Users enter three types of questions in questions setup; organization-specific, proposal-specific, and individual-specific. All questions are answered Yes, No, or NA.

Details on setting up questions are provided in the following chapter:

- [Questions Setup](#), page 7-1

Maps Setup

A map is the hierarchy and sequence of proposal approval stops, including the signatory authorities within each stop. Maps list both primary and alternate approvers. An alternate approver signs the proposal in the event the primary approver is unavailable.

Details on setting up maps are provided in the following chapter:

- [Maps Setup](#), page 8-1

Business Rules Setup

A business rule is a prescribed mathematical method that determines how a proposal is routed during the approval process. It includes a user-defined condition. If the condition is true, the proposal is routed electronically to a hierarchical list of approvers for review through an approval map.

Details on setting up business rules are provided in the following chapter:

- [Business Rules Setup](#), page 9-1

Organization Details Setup

Organization details is organization data that is required by various agencies when users submit proposals. This data is organization-specific and typically not maintained in the Oracle Human Resource Management Systems database.

Details on setting up organization details are provided in the following chapter:

- [Organization Details Setup](#), page 10-1

Biographical Sketch Setup

Biographical sketch is educational, research, and professional experience data about an individual.

Details on setting up biographical sketch information are provided in the following chapter:

- [Biographical Sketch Setup](#), page 11-1

Keywords Setup

Keywords are user-defined identifiers that users employ to identify research areas while preparing proposals.

Details on setting up keywords are provided in the following chapter:

- [Keywords Setup](#), page 12-1

Processes and Reports

This section describes how to run processes and generate reports.

Processes and Reports Procedures

A process is an activity or set of activities that run in the background to accomplish a specific goal.

Reports are sponsor-specific grant application pages that can be printed individually.

Details on processes and reports are provided in the following chapter:

- [Processes and Reports Procedures](#), page 13-1

Topical Essays

This section describes detailed conceptual information.

Grants Proposal Approval and Routing Process

Approval and routing is a process that routes the proposal electronically to a list of organizational authorities and seeks their approval. This process is accomplished through a series of business rule evaluations where each business rule for the applicant unit identified in the proposal is evaluated against the proposal content.

The following business rules are defined by the user for an organization:

- validation
- routing
- notification

Details on the Grants Proposal approval and routing process are provided in the following appendix:

- [Grants Proposal Approval and Routing Process](#), page A-1

Proposal Security Process

Proposal security enables the Proposal Owner or the Proposal Manager to specify users' access to each of the tabs in Grants Proposal.

Details on proposal security are provided in the following appendix:

- [Proposal Security Process](#), page B-1

Oracle Grants Proposal Workflow Process

Oracle Grants Proposal uses Oracle Workflow to manage the proposal approval and notification processes.

Details on the Grants Proposal Workflow processes are provided in the following appendix:

- [Oracle Grants Proposal Workflow Process](#), page C-1

References

This section describes technical reference information.

Uploading Proposals from External Systems

Uploading proposals from external systems is an Application Program Interface (API), or program unit, that collects data from an existing system and uploads it to Oracle Grants Proposal.

Details on uploading proposals from external systems are provided in the following appendix:

- [Uploading Proposals from External Systems](#), page D-1

Electronic Proposal Submission

The electronic transmission of proposals to sponsors in a standard format is accomplished using Electronic Data Interchange (EDI).

Details on electronic proposal submission are provided in the following appendix:

- [Electronic Proposal Submission](#), page E-1

Oracle Grants Proposal Navigation Paths

This chapter shows the navigation path for each window in the forms version of Oracle Grants Proposal.

Details on Grants Proposal forms' navigation paths are provided in the following appendix:

- [Oracle Grants Proposal Navigation Paths](#), page F-1

Part I

Setting Up Oracle Grants Proposal

Oracle Grants Proposal Setup Overview

This chapter provides an overview of the setup steps required for Oracle Grants Proposal. The following sections are in this chapter:

- [Overview](#)
- [Grants Proposal Setup Checklist](#)
- [Grants Proposal Setup Steps](#)

Overview

This chapter provides a setup checklist for Grants Proposal and describes the setup steps.

Complete all required setup steps for the following applications before beginning the Grants Proposal setup steps:

- Database Setup
- Oracle Applications System Administration
- Oracle Human Resource Management Systems
- Oracle Public Sector Receivables
- Oracle Grants Accounting

Note: Grants Accounting is optional

- e-Commerce Gateway

Note: e-Commerce Gateway is optional

Grants Proposal Setup Checklist

Table 3–1 shows the Grants Proposal setup checklist.

Note: The sequence indicated for the setup checklist applies to the Grants Proposal setup process only. For each application installed, consult the guides for that application to determine the sequence of setup steps.

All required setup steps in this checklist must be completed. Specific information for each setup step is described in the following section, Grants Proposal Setup Steps.

Table 3–1 Oracle Grants Proposal Setup Checklist

Step Number	Setup Step	Step Type	Oracle Application
Database Setup			
1.	Setup Database	required	Database
Oracle Applications System Administration			
2.	Specify Profile Options	required with defaults	System Administration
3.	Define Descriptive Flex Fields	optional	System Administration
Oracle Human Resource Management Systems			
4.	Create Locations	required	HRMS
5.	Create Organizations	required	HRMS
6.	Define Organization Hierarchies	required	HRMS
7.	Define Jobs	required	HRMS
8.	Enter Employee Information	required	HRMS

Table 3–1 Oracle Grants Proposal Setup Checklist

Step Number	Setup Step	Step Type	Oracle Application
Oracle Public Sector Receivables			
9.	Define Customers	required	Receivables
Oracle Grants Accounting			
10.	Set Up Grants Accounting	optional	Grants Accounting
e-Commerce Gateway			
11.	Set Up e-Commerce Gateway	optional	e-Commerce Gateway
Oracle Grants Proposal			
12.	Set Up Implementation Options Note: Proposal Owning Organization region is not required if Grants Accounting is installed	required	Grants Proposal
13.	Set Up Proposal Roles	required	Grants Proposal
14.	Set Up Budget	required	Grants Proposal
15.	Set Up Questions	required	Grants Proposal
16.	Set Up Maps	required	Grants Proposal
17.	Set Up Business Rules	required	Grants Proposal
18.	Set Up Organization Details	required	Grants Proposal
19.	Set Up Person	optional	Grants Proposal
20.	Set Up Organization	optional	Grants Proposal
21.	Set Up Biographical Sketch	required	Grants Proposal
22.	Set Up Lookups	optional	Grants Proposal
23.	Set Up Useful Links or Helpful Tools Links on Proposal Development Home page	optional	Grants Proposal
24.	Set Up Keywords	conditionally required	Grants Proposal

Grants Proposal Setup Steps

To set up Grants Proposal, perform the following setup steps in the order listed.

1. Setup Database

While building the database, the database character set should be set to UTF8 to enable the use of special characters in Grants Proposal.

2. Specify Profile Options

This section includes the following parts:

- Set Up Profile Option Levels
- Set Up Profile Option Values

Set Up Profile Option Levels

The common user profile options for Oracle Applications must be specified as part of Oracle Applications System Administration setup. There are a maximum of four levels at which a profile can be set: Site, Application, Responsibility, and User. Most profiles are seeded with default values at the site-level that serve as the defaults until they are overridden at other levels.

If a user is using a single organization, the profile options are set at the site level. If Multiple Organizations is implemented, all Grants Proposal profile values can be set at the responsibility level.

Note: When a profile value or lookup value is added, modified, or deleted, the Apache server must be bounced to reflect the changes in self service Grants Proposal.

Table 3–2 describes the profile option levels.

Table 3–2 Grants Proposal Profile Option Levels

Feature	Profile Option Name	Site	Applica- tion	Respon- sibility	User
Month and day user's fiscal year starts	IGW: Fiscal Year Start Month and Day	x	x	x	x
Job key flexfield segment	IGW: Position Title Segment	x	x	x	x
Multiple organization environment	MO: Operating Unit	x		x	
Set the path for flat-file	ECE: Output File Path	x		x	
Enable proposal EDI transaction	ECE: PRPO Enabled	x		x	
Enable currency	IGW: User Currency Code	x	x	x	x
Enable users to see and modify any proposal, regardless of proposal status	IGW: Proposal Superuser	x	x	x	x

Set Up Profile Option Values

Table 3–3 describes the profile option values.

Table 3–3 Grants Proposal Profile Option Values

Profile Option Name	Value	Description
IGW: Fiscal Year Start Month and Day	four digits	use the MMDD format where M means month and D means day. For example, July 1 would be specified as 0701.
IGW: Position Title Segment	segment identifier	job key flexfield segment in which job name, or position title, is implemented in Human Resource Management Systems
MO: Operating Unit	appropriate organization	Repeat profile option sequence for each additional organization. Note: Each organization linked to a particular responsibility appears on the Responsibilities menu. When logging in, users select the responsibility that corresponds to the appropriate organization. Each unique organization identifier must be associated with a responsibility.
ECE: Output File Path	matches the value in the INIT.ORA file; /sqlcom/outbound is an example of an output file path	if enabled, users designate directory path where the EDI flat file is created. For information on creating the directory path, see <i>Oracle e-Commerce Gateway User's Guide</i> .
ECE: PRPO Enabled	Yes	if enabled, users can run the EDI process and create EDI flat files. PRPO is transaction code for Grants Proposal.
IGW: User Currency Code	any currency	if US Dollar is enabled, users see USD for dollar amounts
IGW: Proposal Superuser	No	if set to Yes, users can modify all tabs of any proposal, regardless of proposal status

3. Define Descriptive Flexfields (Optional)

Users can optionally define descriptive flexfields in the Organization Details tab and the Unit Details tab of the Organization Details window.

Users can optionally define descriptive flexfields in the following self service pages:

- Basic Information; Basic Information link on the General tab
- Paragraph; Paragraphs link on the General tab

- Person Details; Personnel link on the General tab; Biographical Sketch View
- Other Support Details; Personnel link on the General tab
- Budget Versions; Budget tab

4. Create Locations

If HRMS is implemented, this step is completed in the HRMS responsibility.

To use Grants Proposal without HRMS implemented, users must create locations. Locations are physical sites where employees work.

To create locations, perform the following steps.

1. In Grants Proposal, navigate to the Location window as follows:

Setup - Human Resources - Locations

2. For information on creating locations, see [Setting Up Locations, Using Oracle HRMS - The Fundamentals](#).

5. Create Organizations

If HRMS is implemented, this step is completed in the HRMS responsibility.

To use Grants Proposal without HRMS implemented, users must create organizations. Organizations are internal to the submitting organization, such as departments.

To create organizations, perform the following steps.

1. In Grants Proposal, navigate to the Organization window as follows:

Setup - Human Resources - Organizations - Define

2. For information on creating organizations, see [Creating an Organization, Using Oracle HRMS - The Fundamentals](#).

6. Define Organization Hierarchies

If HRMS is implemented, this step is completed in the HRMS responsibility.

To use Grants Proposal without HRMS implemented, users must define organization hierarchies. Organization hierarchies are organization structures or trees that show relationships between organizations or departments.

To define organization hierarchies, perform the following steps.

1. In Grants Proposal, navigate to the Find Organization Hierarchy window as follows:
Setup - Human Resources - Organizations - Hierarchies
2. For information on defining organization hierarchies, see [Creating Organization Hierarchies](#), *Using Oracle HRMS - The Fundamentals*.

7. Define Jobs

If HRMS is implemented, this step is completed in the HRMS responsibility.

To use Grants Proposal without HRMS implemented, users must define jobs. Jobs are generic roles within an organization that are independent of any single organization. For example, the generic jobs Manager and Consultant occur in many organizations.

To define jobs, perform the following steps.

1. In Grants Proposal, navigate to the Job window as follows:
Setup - Human Resources - Jobs
2. For information on defining jobs, see [Defining a Job](#), *Using Oracle HRMS - The Fundamentals*.

8. Enter Employee Information

If HRMS is implemented, this step is completed in the HRMS responsibility.

To use Grants Proposal without HRMS implemented, users must enter employee information. All personnel must be entered who need access to the proposal and those who have a role on the proposed research.

To enter employee information, perform the following steps.

1. In Grants Proposal, navigate to the Enter Person window as follows:
Setup - Human Resources - Employees
2. For information on entering employee information, see [Entering a New Person](#), *Managing People Using Oracle HRMS*.

9. Define Customers

If Receivables is implemented, this step is completed in the Receivables responsibility.

To use Grants Proposal without Receivables implemented, users must define customers, known as sponsors in Grants Proposal, as well as sponsors' addresses.

To define sponsors and their addresses, perform the following steps.

1. In Grants Proposal, navigate to the Find/Enter Customers window as follows:
Setup - Sponsor Entry
2. For information on defining customers, see [Entering Parties and Customer Accounts](#), *Oracle Public Sector Receivables User's Guide*.

10. Set Up Grants Accounting (Optional)

To use Grants Proposal with Grants Accounting, optionally set up Grants Accounting.

For information on setting up Grants Accounting, see [Oracle Grants Accounting Setup Overview](#), *Oracle Grants Accounting User's Guide*.

11. Set Up e-Commerce Gateway (Optional)

To use Grants Proposal with e-Commerce Gateway, optionally set up e-Commerce Gateway.

To set up e-commerce Gateway, see Setting Up, *Oracle e-Commerce Gateway User's Guide*.

12. Set Up Implementation Options

Implementation options is a setup procedure used to specify the method of assigning a unique number to a proposal.

To set up implementation options, see [Implementation Options Setup](#), page 4-1.

13. Set Up Proposal Roles

A proposal role is a user-defined functional title that is associated with system-defined proposal rights. Proposal roles with their associated rights restrict individuals' access to one or more parts of a proposal.

To set up proposal roles, see [Proposal Roles Setup](#), page 5-1.

14. Set Up Budget

Budget setup is required for defining overhead rates, employee benefits rates, and inflation rates to be used during budget development.

To set up a budget, see [Budget Setup](#), page 6-1.

15. Set Up Questions

The questions that users set up are related to assurance, compliance, and certification issues. Most sponsors require that responses to these questions be included in the proposal before funding is considered. Three types of questions are included in the setup; organization-specific, proposal-specific, and individual-specific. Most questions can be answered by either Yes or No.

To set up questions, see [Questions Setup](#), page 7-1.

16. Set Up Maps

A map is the hierarchy and sequence of proposal approval stops and the signatory authorities within each stop. Maps list both primary and alternate approvers. An alternate approver signs the proposal in the event the primary approver is unavailable.

To set up maps, see [Maps Setup](#), page 8-1.

17. Set Up Business Rules

A business rule is a condition that determines how a proposal is routed during the approval process. If the condition is true, the proposal is routed electronically to a hierarchical list of approvers for review through an approval map. An approval map consists of one or more stops. A stop can list one or more approvers.

To set up business rules, see [Business Rules Setup](#), page 9-1.

18. Set Up Organization Details

Organization details is the set of information specific to the organization that is required by various sponsors when users submit proposals. This information is proposal-specific and typically not maintained in the Oracle Human Resource Management Systems database.

To set up organization details, see [Organization Details Setup](#), page 10-1.

19. Set Up Person (Optional)

External persons are user-defined persons in Grants Proposal that do not currently exist in users' Human Resources applications.

To set up external persons, see Grants Proposal self service online help.

20. Set Up Organization (Optional)

External organizations are user-defined organizations in Grants Proposal that do not currently exist in users' Human Resources applications.

To set up external organizations, see Grants Proposal self service online help.

21. Set Up Biographical Sketch

Biographical sketch is educational, research, and professional experience data about an individual.

To set up biographical sketch, see [Biographical Sketch Setup](#), page 11-1.

22. Set Up Lookups

Users can optionally add user-defined lookups to the system-defined lookups.

23. Set Up Useful Links or Helpful Tools Links on Proposal Development Home Page (Optional)

To setup or modify links in the Useful Links or Helpful Tools areas of the Proposal Development Home page, perform the following steps:

1. Select the AK Developer responsibility.
2. In AK Developer, navigate to the Regions window as follows:
Define Regions
3. In the Region ID field, navigate as follows:
View Menu - Query By Example - Enter
4. In the Region ID field, enter IGW_CURRENT_PROPOSALS_CONTENT%
5. In the Region ID field, navigate as follows:
View Menu - Query By Example - Run
6. The following two search results appear in the Region Name field:

- Current Proposals Content Container
 - Current Proposals Content Container 1
7. Select Current Proposals Content Container and click **Region Items**.
The Region Items window appears.
 8. In the Long Label field, enter or change the link name.
 9. In the URL field, enter or change the URL.
 10. In the Regions window, select Current Proposals Content Container 1 and click **Region Items**.
The Region Items window appears.
 11. Repeat Steps 8 and 9.
 12. Click the Save icon or navigate as follows:
File Menu - Save
 13. Close the window.
 14. Logout of Oracle Applications.
 15. Restart the Apache server.
 16. Login again to Oracle Applications to view changes.

24. Set Up Keywords (Conditionally Required)

Keywords are user-defined identifiers that users employ to identify research areas while preparing proposals.

To set up keywords, see [Keywords Setup](#), page 12-1.

Implementation Options Setup

This chapter describes how to set up implementation options. The following sections are in this chapter:

- [Definition](#)
- [Overview](#)
- [Setting Up Implementation Options Procedure](#)
- [Implementation Options Window, Proposal Setup Tab](#)
- [Implementation Options Window Description](#)

Definition

Implementation options is a setup procedure used to specify the following:

- method of assigning a unique number to a proposal
- proposal owning organization
- proposal approval organization

Overview

Specifying the method and type of proposal numbering is a setup procedure in Oracle Grants Proposal. Users can set the proposal numbering method to manual or automatic.

The manual method of proposal numbering can be set to alphanumeric type or numeric type. The automatic method of proposal numbering is set to numeric type only.

If users select the automatic method of proposal numbering, they specify the number that they want the system to automatically assign to the next proposal. Grants Proposal then generates subsequent proposal numbers automatically.

The default proposal numbering option is the manual method and the alphanumeric type.

Proposal Numbering

The proposal numbering setup mechanism offers users flexibility in proposal numbering. The proposal numbering setup procedure is ideally performed by users before developing any proposals. However, users can change the proposal numbering option at any time. If users change the proposal numbering option, Grants Proposal checks to ensure that existing values are not duplicated or altered.

Proposal Owning Organization

If Grants Accounting is not installed, users must specify the organization hierarchy name, hierarchy version, and the starting node in the hierarchy that coordinates and administers proposal development tasks.

Proposal Approval Organization

An approval organization hierarchy is a ranking of approval organizations, starting with the organization preparing the proposal and ending with the top-most organization. Users must specify the approval organization hierarchy name, hierarchy version, and the starting node in the hierarchy that is involved in the approval process.

Setting Up Implementation Options Procedure

To set up implementation options, perform the following steps.

1. In Grants Proposal, navigate to the Implementation Options window as follows:

Setup - Implementation Options

2. Select the Proposal Setup Tab.

Proposal Numbering Method Region

3. In the Proposal Numbering Method region, select the Manual or Automatic radio button.

Type Region

4. If the Manual radio button is selected, then select the Alphanumeric or Numeric radio button in the Type region.

Next Number Region

5. If the Automatic radio button is selected, the Next Number field appears in the Implementation Options window.
6. In the Next Number field, enter the number that the user wants the system to automatically assign to the next proposal.

Proposal Owning Organization Region

7. In the Organization Hierarchy field, select an organization hierarchy name from the list of values that coordinates and administers the proposal development tasks.
8. In the Version field, select a hierarchy version from the list of values.
9. In the Start Organization field, select the starting organization in the hierarchy from the list of values.
10. Select the Approval Setup Tab.

Proposal Approval Organization

11. In the Organization Hierarchy field, select an organization hierarchy name from the list of values that is involved in the proposal approval process.
12. In the Version field, select a hierarchy version from the list of values.
13. In the Start Organization field, select the starting organization in the hierarchy from the list of values.
14. Save or save and continue as follows:
File - Save or Save and Proceed
15. Close the window.

Implementation Options Window, Proposal Setup Tab

Figure 4–1 *Implementation Options Window, Proposal Setup Tab, Manual Proposal Numbering*

The screenshot displays the 'Implementation Options (Progress Public)' window with the 'Proposal Setup' tab selected. The window is divided into several sections:

- Proposal Numbering Method:** Two radio buttons are present: 'Manual' (selected) and 'Automatic'.
- Type:** Two radio buttons are present: 'Alphanumeric' (selected) and 'Numeric'.
- Expenditure Category/Type:** Two text input fields are shown. The first is labeled 'Overhead' and contains the text 'Indirect Cost Recovery'. The second is labeled 'Unmatched' and contains the text 'Unmatched Budget Category'.
- Proposal Owning Organization:** Three text input fields are shown: 'Organization Hierarchy', 'Version', and 'Start Organization'.

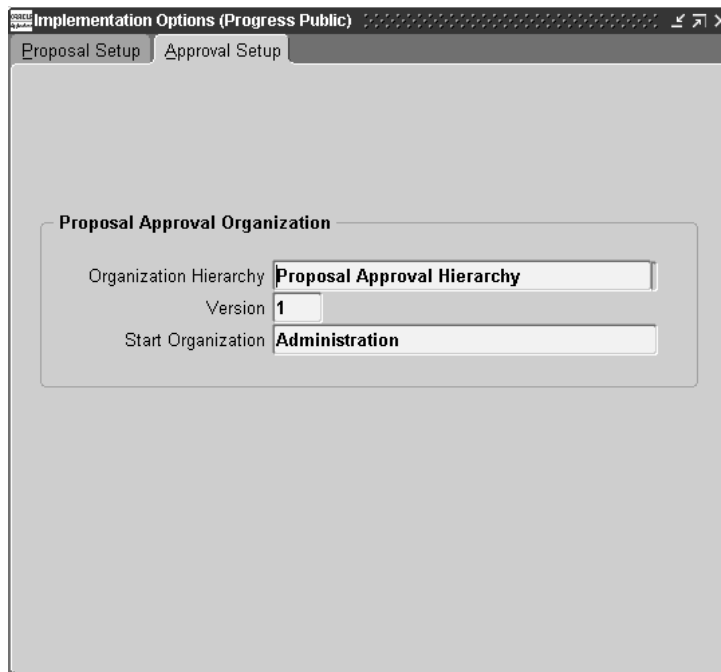
Figure 4–2 Implementation Options Window, Proposal Setup Tab, Automatic Proposal Numbering

The screenshot shows a window titled "Implementation Options (Progress Public)" with two tabs: "Proposal Setup" and "Approval Setup". The "Proposal Setup" tab is active. The window is divided into three main sections:

- Proposal Numbering Method:** Contains two radio buttons: "Manual" (unselected) and "Automatic" (selected).
- Next Number:** A text input field containing an empty space.
- Expenditure Category/Type:** Contains two rows of labels and text input fields:
 - Overhead: Indirect Cost Recovery
 - Unmatched: Unmatched Budget Category
- Proposal Owning Organization:** Contains three rows of labels and text input fields:
 - Organization Hierarchy
 - Version
 - Start Organization

Implementation Options Window, Approval Setup Tab

Figure 4–3 Implementation Options Window, Approval Setup Tab



Implementation Options Window Description

Table 4–1 Implementation Options Window Description

Field Name	Type	Features	Description
Proposal Setup Tab, Proposal Numbering Method Region			
Manual	optional	radio button	specifies that proposals are numbered manually
Automatic	optional	radio button	specifies that proposals are numbered automatically by Grants Proposal
Proposal Setup Tab, Type Region			
Alphanumeric	optional	radio button	specifies that proposal numbers can consist of letters, digits, or other characters
Numeric	optional	radio button	specifies that proposal numbers consist of numeric values
Proposal Setup Tab, Next Number Region			
Next Number	conditionally required		specifies proposal number to be automatically assigned to the next proposal; users must enter a number in this field if Automatic method of proposal numbering is selected
Proposal Setup Tab, Proposal Owning Organization Region			
Organization Hierarchy	conditionally required	list of values	organization hierarchy name that coordinates and administers the proposal development tasks; users select an option if Grants Accounting is not installed. Options originate from Human Resource Management Systems.
Version	conditionally required	list of values	hierarchy version; users select an option if Grants Accounting is not installed. Options originate from Human Resource Management Systems.
Start Organization	conditionally required	list of values	starting node in the hierarchy; users select an option if Grants Accounting is not installed. Options originate from Human Resource Management Systems.

Table 4–1 Implementation Options Window Description

Field Name	Type	Features	Description
Approval Setup Tab, Proposal Approval Organization Region			
Organization Hierarchy	required	list of values	organization hierarchy name that is involved in proposal approval process. Options originate from Human Resource Management Systems.
Version	required	list of values	hierarchy version. Options originate from Human Resource Management Systems.
Start Organization	required	list of values	starting node in the hierarchy. Options originate from Human Resource Management Systems.

Proposal Roles Setup

This chapter describes how to set up proposal roles and assign rights to the roles. The following sections are in this chapter:

- [Definition](#)
- [Overview](#)
- [Creating Proposal Roles Procedure](#)
- [Create Roles Window](#)
- [Create Roles Window Description](#)
- [Modifying Proposal Roles Procedure](#)

Definition

A proposal role is a user-defined functional title that is associated with system-defined proposal rights. Proposal roles with their associated rights restrict individuals' access to one or more tabs of a proposal.

Overview

Proposal roles must be setup to ensure proper functioning of Oracle Grants Proposal.

The organization's Sponsored Research Office typically defines proposal roles. Examples of user-defined proposal roles include Narrative Writer, Budget Creator, and Viewer. Users can assign one or more seeded proposal rights to a user-defined proposal role. A role is then assigned to one or more members of the proposal team by the Proposal Owner or the Proposal Manager. The assignment of roles to proposal team members restricts their access to one or more tabs of the proposal, which provides security.

[Table 5-1](#) shows the system's seeded proposal rights and associated descriptions:

Table 5-1 Seeded Proposal Rights with Corresponding Seeded Descriptions

Seeded Proposal Rights	Seeded Description
Modify General Tab	Modify and View General Tab Contents
Modify Budget Tab	Modify and View Budget Tab Contents
Modify Narrative Tab	Modify and View Narrative Tab Contents
Modify Checklist Tab	Modify and View Checklist Tab Contents
Submit Proposal for Approval	Submit Proposal for Approval
Modify Sponsor Action Tab	Modify and View Sponsor Action Tab Contents
Modify Award Tab	Modify and View Award Tab Contents
View Proposal	View Proposal
Print Proposal	Print Proposal

Table 5–2 shows the system’s seeded roles with corresponding seeded rights and typical role functions.

Table 5–2 Seeded Roles with Corresponding Seeded Rights and Typical Role Functions

Seeded Roles	Seeded Rights Assigned to Seeded Roles	Typical Functions of Role
Proposal Owner	Modify General Tab, Modify Budget Tab, Modify Narrative Tab, Modify Checklist Tab, Submit Proposal for Approval, Modify Sponsor Action Tab, Modify Award Tab, Print Proposal	creates proposal, assigned maximum rights, acts as administrator, submits the proposal
Proposal Manager	Modify General Tab, Modify Budget Tab, Modify Narrative Tab, Modify Checklist Tab, Submit Proposal for Approval, Modify Sponsor Action Tab, Modify Award Tab, Print Proposal	assigned maximum rights, has final responsibility and accountability for the proposal, sometimes known as the principle investigator
Proposal Approver	View Proposal, Print Proposal	receives, views, approves, and prints the proposal
Proposal Viewer	View Proposal, Print Proposal	receives, views, and prints the proposal

The person who creates the proposal is automatically assigned the role of Proposal Owner and is automatically assigned all rights. The role of Proposal Manager is specified by the Proposal Owner and is also automatically assigned all rights. The Proposal Owner and the Proposal Manager can be the same or different people.

The seeded roles of Proposal Owner, Proposal Manager, Proposal Approver, and Proposal Viewer cannot be modified or deleted from the Create Roles window. However, the rights that are associated with the seeded roles can be modified or deleted. Roles that are in use in a proposal also cannot be deleted or modified from the Create Roles window.

Table 5–3 shows an example of how users can create proposal roles and assign one or more rights to a role.

Table 5–3 Example of User-Defined Proposal Roles

Proposal Roles	Proposal Rights Assigned to Proposal Roles
Viewer	View Proposal + Print Proposal
Narrative Writer	Modify Narrative Tab + View Proposal + Print Proposal
Budget Creator	Modify Budget Tab + View Proposal + Print Proposal

[Table 5-4](#) shows a sample proposal team with assigned roles and corresponding rights.

Table 5-4 Sample Research Team with Assigned Roles and Corresponding Rights

Research Team	Proposal Roles	Proposal Rights Assigned to Proposal Roles
Principal Investigator	Proposal Manager	Modify General Tab + Modify Budget Tab + Modify Narrative Tab + Modify Checklist Tab + Submit Proposal for Approval + Modify Sponsor Action Tab + Modify Award Tab + View Proposal + Print Proposal
Co-Investigator 1	Narrative Writer	Modify Narrative Tab + Modify General Tab + View Proposal + Print Proposal
Co-Investigator 2	Budget Creator	Modify Budget Tab + Modify General Tab + View Proposal + Print Proposal
Department Administrator	Proposal Owner	Modify General Tab + Modify Budget Tab + Modify Narrative Tab + Print Proposal
Research Associate	Viewer	View Proposal + Print Proposal

Creating Proposal Roles Procedure

To create proposal roles, perform the following steps.

1. In Grants Proposal, navigate to the Create Roles window as follows:

Setup - Proposal Roles

2. In the Role Name field, enter the role name.

Note: The seeded roles of Proposal Owner, Proposal Manager, Proposal Approver, and Proposal Viewer appear here. These roles cannot be deleted.

3. In the Start Date field, select a starting date for the role from the list of values.

Note: The default date is the current date, which users can change.

4. In the End Date field, optionally select an ending date for the role from the list of values.

Note: Leaving the End Date field empty results in a continuously effective role for this proposal.

5. In the Right Name field, select a right name and description from the list of values to associate with the role.

Note: Users can select one or more rights to associate with a particular role.

6. Save or save and continue as follows:

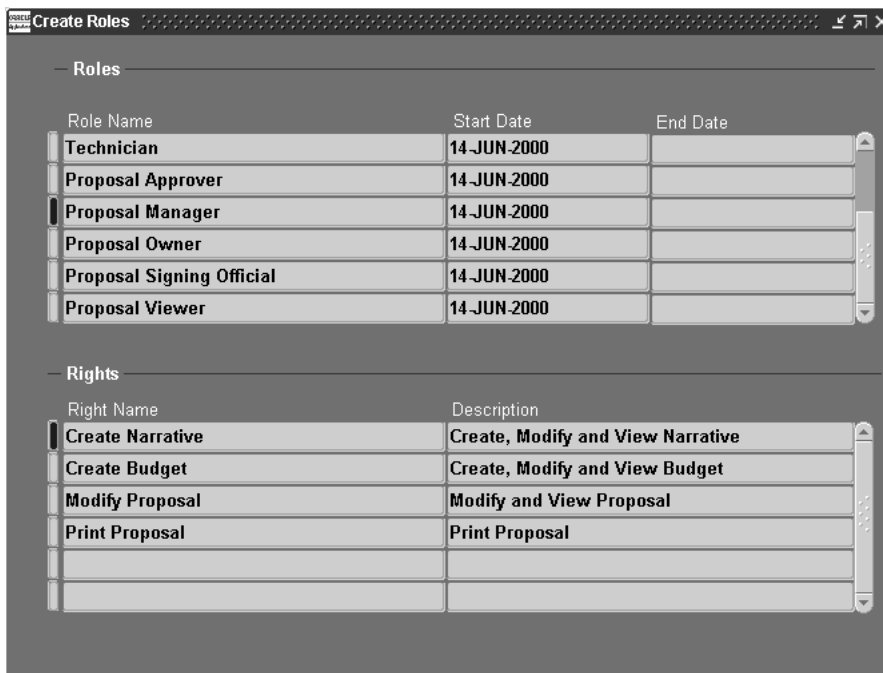
File - Save or Save and Proceed

7. Repeat Steps 2 to 5 until all roles and corresponding rights are entered.

8. Close the window.

Create Roles Window

Figure 5–1 Create Roles Window



The screenshot shows a window titled "Create Roles" with two main sections: "Roles" and "Rights".

Roles Section:

Role Name	Start Date	End Date
Technician	14 JUN 2000	
Proposal Approver	14 JUN 2000	
Proposal Manager	14 JUN 2000	
Proposal Owner	14 JUN 2000	
Proposal Signing Official	14 JUN 2000	
Proposal Viewer	14 JUN 2000	

Rights Section:

Right Name	Description
Create Narrative	Create, Modify and View Narrative
Create Budget	Create, Modify and View Budget
Modify Proposal	Modify and View Proposal
Print Proposal	Print Proposal

Create Roles Window Description

Table 5-5 Create Roles Window Description

Field Name	Type	Features	Description
Roles Region			
Role Name	required		user-defined role name; functional title. Seeded roles of Proposal Owner, Proposal Manager, and Proposal Approver cannot be deleted.
Start Date	required	list of values: pop-up calendar	role start date; defaults to current date that can be changed
End Date	optional	list of values: pop-up calendar	role end date; if empty, specifies that role name exists indefinitely
Rights Region			
Right Name	required	list of values	system-defined right name; defines level of access for proposal
Description	default, display only		system-defined right description; populates automatically when users select right name from list of values

Modifying Proposal Roles Procedure

To modify proposal roles, perform the following steps.

1. In Grants Proposal, navigate to the Create Roles window as follows:

Setup - Proposal Roles

2. To modify a user-defined role, highlight the role name in the Role Name field and press the Back Space key on the keyboard.

Note: The seeded roles of Proposal Owner and Proposal Approver cannot be modified or deleted.

3. In the Role Name field, enter another role name.
4. To unassign a right name from a role, click in the appropriate Right Name field and then click the Delete button on the toolbar.
5. Save or save and continue as follows:

File - Save or Save and Proceed

6. Close the window.

Budget Setup

This chapter describes how to set up rates that are used in budget calculations for research proposals, assign expenditure categories to budget categories, assign expenditure categories to rate class and rate type pairs, and define a budget hierarchy. The following sections are in this chapter:

- [Definition](#)
- [Overview](#)
- [Prerequisites](#)
- [Defining Rate Classes and Rate Types Procedure](#)
- [Rate Classes and Rate Types Window](#)
- [Rate Classes and Rate Types Window Description](#)
- [Defining Rates Procedure](#)
- [Rates Window](#)
- [Rates Window Description](#)
- [Defining Expenditure Categories and Expenditure Types without Grants Accounting Installed Procedure](#)
- [Assigning Expenditure Categories to Budget Categories with Grants Accounting Installed Procedure](#)
- [Expenditure Categories Window, Budget Category Tab](#)
- [Expenditure Categories Window, Effective Dates Tab](#)
- [Expenditure Categories Window Description](#)
- [Expenditure Types Window](#)

-
- Expenditure Types Window Description
 - Assigning Expenditure Categories to Rate Class and Rate Type Pairs Procedure
 - Assign Expenditure Categories Window
 - Assign Expenditure Categories Window Description
 - Expenditure Types Window Description
 - Defining a Sponsor Budget Hierarchy Procedure
 - Sponsor Budget Hierarchy Window
 - Sponsor Budget Hierarchy Window Description

Definition

Budget setup is used to perform the following tasks:

- define rate classes
- define rate types
- define rates
- assign expenditure categories to budget categories
- assign expenditure categories to rate class and rate type pairs
- define a budget hierarchy

Budget setup is required for defining overhead rates, employee benefits rates, and inflation rates to be used during budget development.

Overview

Rates must be set up to ensure proper functioning of Oracle Grants Proposal.

Organizations employ several types of cost rates for proposal budgets. These are usually expressed in percentages and are used to calculate indirect costs. Some rates are determined by the organization's fiscal policies and others are negotiated by the federal government.

Oracle Grants Proposal supplies users with three rate class types. These system-defined rate class types include the following:

- Overhead (OH) Rates
- Employee Benefits (EB) Rates
- Inflation Rates

Note: Sponsors, including federal sponsors, refer to Overhead Rates as Facility and Administration (F&A) Rates. These terms are used interchangeably by the research community.

A given rate class type can have one or more rate classes. A rate class is a percentage. The following are examples of rates classes for overhead rate class types:

- Modified Total Direct Costs (MTDC)
- Total Direct Costs (TDC)

- Salary and Wages (S&W)

A given rate class can have one or more rate types. A rate type is a percentage. Rate types are usually based on sponsor requirements or on the project location.

Budget Setup Process

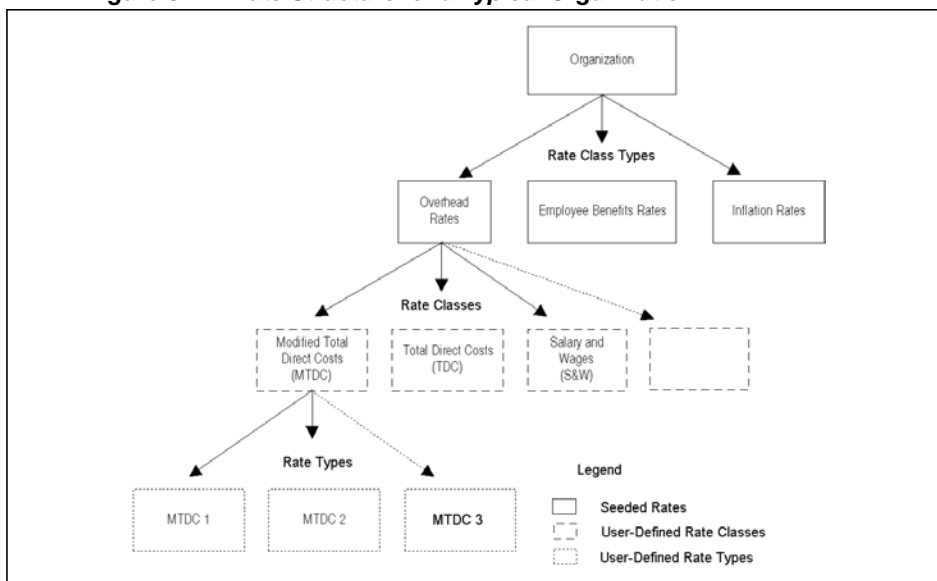
The budget setup for rates includes the following steps:

1. Define rate classes and rate types.
2. Define rates for each activity type, each research location, and every fiscal year for which the proposal budget is requesting funding. Rates can be defined for each pair of rate class and rate type.
3. If Grants Accounting is also installed, expenditure categories and expenditure types are obtained from Grants Accounting. Assign expenditure categories to a sponsor budget category. Go to Step 6.
4. If only Grants Proposal is installed, define expenditure categories and expenditure types and assign them to sponsor budget categories.
5. Define expenditure types for the available expenditure categories.
6. Assign expenditure categories to rate class and rate type pairs.

Rate Structure for a Typical Organization Diagram

[Figure 6-1](#) shows the rate structure for a typical organization as described in the Overview section.

Figure 6–1 Rate Structure for a Typical Organization



Seeded Rate Class Types

Seeded rate class types provided by Oracle Grants Proposal include the following:

- overhead rates
- employee benefits rates
- inflation rates

Overhead Rates

Overhead rates are referred to as F&A (Facility and Administration) rates by the federal government. These are costs incurred by the organization for conducting research. Generically, overhead rates are also known as indirect costs. Overhead rates are recovered by the organization from the funding source, usually as a percentage of direct costs.

The organization negotiates overhead rates with the federal government; generally for a four to five year period. These rates are organization-specific, rather than grant specific, and can differ by the type of research conducted.

Employee Benefits Rates

Employee benefits (EB) rates are also known as fringe benefits. Fringe benefits are benefits offered by the employer to the employee as part of the total compensation package. Typically, the employer provides certain fringe benefits, while the employee pays for others. Examples of fringe benefits include health insurance, life insurance, disability insurance, and workmen's compensation.

Most organizations provide employee benefits to employees as a fixed percentage of salary. Employee benefits rates may differ by type of employee, such as faculty or non-faculty, and are typically defined for each fiscal year for which a proposal is developed.

Inflation Rates

Inflation rates are percentages that adjust for inflation increases on proposal budget items. Inflation rates are applied to most salary and non-salary budget items, except equipment.

Organizations can have different inflation rates applied to different expenditure types. For example, the inflation rate for salary might be 3%, whereas the rate for graduate tuition might be 6%. Organizations can also apply different inflation rates to different expenditure types on different dates.

Inflation rates are typically defined for each fiscal year for which a proposal is developed.

User-Defined Rate Classes

Examples of user-defined rate classes include the following:

- modified total direct costs overhead rate
- total direct costs overhead rate
- salary and wages overhead rate

Modified Total Direct Costs Overhead Rate

The Modified Total Direct Costs Overhead Rate is a rate class expressed as a percentage. This percentage is negotiated with the federal government and is used to calculate indirect costs.

Total Direct Costs Overhead Rate

The Total Direct Costs Overhead Rate is a rate class expressed as a percentage. This percentage is determined by the organization and is used to calculate indirect costs.

Salary and Wages Overhead Rate

The Salary and Wages Overhead Rate is a rate class expressed as a percentage. This percentage is used to calculate indirect costs based on salary and wages.

References

For information on defining expenditure types in Grants Accounting, see *Defining Expenditure Types for Burden Costs Procedure*, *Oracle Grants Accounting User's Guide*.

Prerequisites

- ❑ If Grants Accounting is installed, expenditure categories and expenditure types must be defined in the Grants Accounting Expenditure Types window.

To define expenditure categories and expenditure types in Grants Accounting, see [Defining Expenditure Types for Burden Costs Procedure](#), *Oracle Grants Accounting User's Guide*.

Defining Rate Classes and Rate Types Procedure

To define rate classes and rate types, perform the following steps.

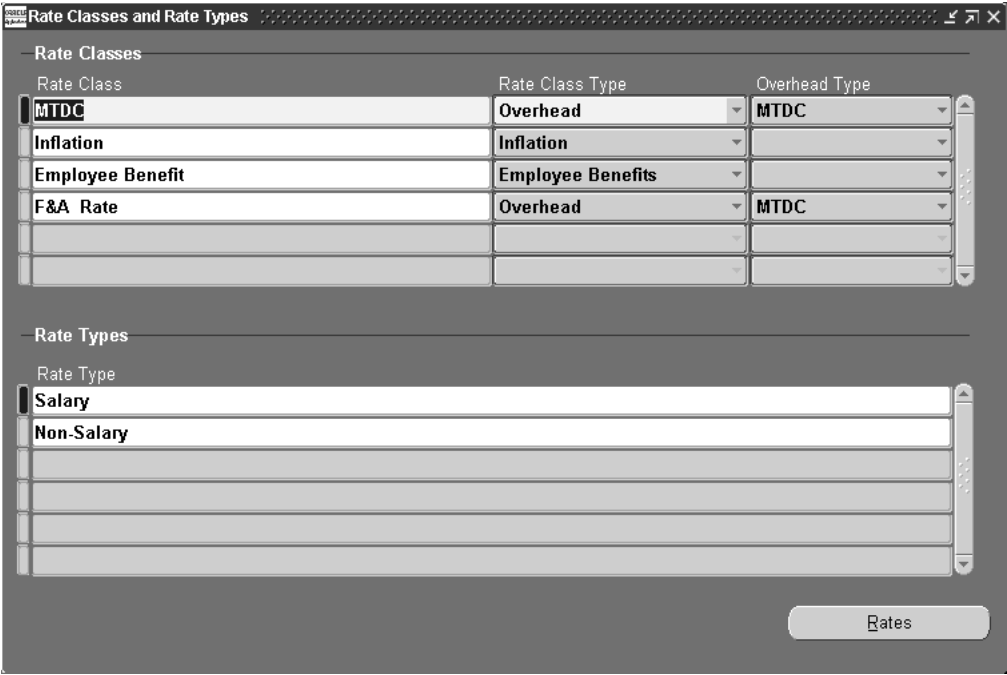
1. In Grants Proposal, navigate to the Rate Classes and Rate Types window as follows:

Setup - Budgets - Rates

2. Enter data in each field of the Rate Classes and Rate Types window as described in [Table 6-1](#), page 6-10.
3. Save or save and continue as follows:
File - Save or Save and Proceed
4. Close the window.

Rate Classes and Rate Types Window

Figure 6-2 Rate Classes and Rate Types Window



Rate Classes and Rate Types Window Description

Table 6–1 Rate Classes and Rate Types Window Description

Field Name	Type	Features	Description
Rate Classes Region			
Rate Class	required		rate class description
Rate Class Type	required	drop-down list	specifies rate class type; options are Inflation, Employee Benefits, or Overhead
Overhead Type	conditionally required	drop-down list	specifies overhead type. Options are MTDC, S&W, or Other; only applicable if Overhead is selected in the Rate Class Type field
Rate Types Region			
Rate Type	required		rate type description; users must define at least one rate type
Rates		button	opens Rates window where users define rates corresponding to a given rate class and rate type combination

Defining Rates Procedure

To define rates corresponding to a given rate class and rate type combination, perform the following steps.

1. In Grants Proposal, navigate to the Rate Classes and Rate Types window as follows:

Setup - Budgets - Rates

2. Select the Description field for Rate Class and select the Description field for Rate Type that users want to assign a rate to.
3. Click **Rates** to open the Rates window.

The fields selected in Step 2 display in the Rate Class and Rate Type fields.

4. Enter data in each field of the Rates region as described in [Table 6-2](#), page 6-13.
5. Save or save and continue as follows:

File - Save or Save and Proceed

6. Close the window.

Rates Window

Figure 6–3 Rates Window

Rate Class Rate Type

Rates

Activity Types	Fiscal Year	Location	Start Date	Rate
Organized Research	1999	Off-Campus	01-JUL-1998	24.00
Organized Research	2000	Off-Campus	01-JUL-1999	24.00
Organized Research	2001	Off-Campus	01-JUL-2000	24.00
Organized Research	2002	Off-Campus	01-JUL-2001	24.00
Organized Research	2003	Off-Campus	01-JUL-2002	24.00
Organized Research	2004	Off-Campus	01-JUL-2003	24.00
Organized Research	2005	Off-Campus	01-JUL-2004	24.00
Organized Research	1999	On-Campus	01-JUL-1998	50.00
Organized Research	2000	On-Campus	01-JUL-1999	50.00
Organized Research	2001	On-Campus	01-JUL-2000	50.00

Rates Window Description

Table 6–2 Rates Window Description

Field Name	Type	Features	Description
Rate Class	display only		subset of a system-defined rate class type. Examples of rate classes that are subsets of Overhead Rates include Modified Total Direct Costs (MTDC), Total Direct Costs (TDC), and Salary and Wages (S&W). Field displays rate class selected in the Rate Classes and Rate Types window.
Rate Type	display only		subset of a rate class. Examples of rate types include MTDC 1, MTDC 2, and MTDC 3. Field displays rate type selected in Rate Classes and Rate Types window.
Rates Region			
Activity Types	required	list of values	user-defined type of activity that the proposed research is requesting funding for. Examples of activity types include Research for research grants, Instruction for instructional or training grants, Fellowships for supporting postdoctoral fellows, Public Service for a public service project, Student Service for a research proposal supporting students, Hospital, Hospital Affiliate, and Other for any other purpose.
Fiscal Year	required		yearly period established for accounting purposes that specified activity type applies to
Location	required	list of values	user-defined place where proposed research occurs. Examples include On-Campus, Off-Campus, or Affiliated Organizations.
Start Date	display only		start date of applicable rate; default is the start date of the fiscal year.
Rate	required		percentage expressed in decimal format

Defining Expenditure Categories and Expenditure Types without Grants Accounting Installed Procedure

If Grants Accounting is not installed, the following procedure is applicable.

If both Grants Proposal and Grants Accounting are installed, see [Assigning Expenditure Categories to Budget Categories with Grants Accounting Installed Procedure](#) in this chapter.

Defining Expenditure Categories

Expenditure categories are cost classifications to which expenditure types are assigned.

To define expenditure categories in Grants Proposal when Grants Accounting is not installed, perform the following steps.

1. In Grants Proposal, navigate to the Expenditure Categories window as follows:
Setup - Budgets - Expenditure Categories/Types
2. Select the Budget Category tab.
3. Enter data in the following fields as described in [Table 6-3](#), page 6-19.
 - Expenditure Category
 - Description
4. Enter data in the following areas as described in [Table 6-3](#), page 6-19.
 - Sponsor Budget Category field
 - Personnel Attached check box
5. Select the Effective Dates tab.
6. Enter data in the following fields as described in [Table 6-3](#), page 6-19.
 - Start Date
 - End Date
7. Repeat Steps 3 to 6 until all expenditure categories that can be used in budgets have been entered.

Note: The expenditure categories specified in the expenditure category fields represent an exhaustive list of all possible expenditure categories that can be used for any budget.

8. Save or save and continue as follows:

File - Save or Save and Proceed

Defining Expenditure Types

To define expenditure types in Grants Proposal when Grants Accounting is not installed, perform the following steps.

1. Click **Expenditure Types**.

The Expenditure Types window appears.

2. Enter data in each field of the Expenditure Types window as described in [Table 6-4](#), page 6-21.

3. Save or save and continue as follows:

File - Save or Save and Proceed

4. Close the window.

Assigning Expenditure Categories to Budget Categories with Grants Accounting Installed Procedure

If Grants Accounting is installed, users must define expenditure categories and expenditure types in the Grants Accounting Expenditure Types window before performing this procedure.

If Grants Accounting is installed and expenditure categories and expenditure types have been defined in Grants Accounting, the following procedure is applicable.

If Grants Accounting is not installed, see the [Defining Expenditure Categories and Expenditure Types without Grants Accounting Installed Procedure](#) in this chapter.

To assign expenditure categories to budget categories in Grants Proposal when Grants Accounting is installed, perform the following steps.

1. In Grants Proposal, navigate to the Expenditure Categories window as follows:
Setup - Budgets - Expenditure Categories/Types
2. Select the Budget Category tab.
3. In the Expenditure Category field, select an expenditure category from the list of values.
4. Assign each expenditure category to a budget category by entering data in the following areas as described in [Table 6-3](#), page 6-19.
 - Sponsor Budget Category field
 - Personnel Attached check box

Note: The expenditure categories specified in the expenditure category fields represent an exhaustive list of all possible expenditure categories that can be used for any budget.
5. Select the Effective Dates tab.
6. Enter data in the following fields as described in [Table 6-3](#), page 6-19.
 - Start Date
 - End Date
7. Save or save and continue as follows:
File - Save or Save and Proceed
8. Close the window.

Expenditure Categories Window, Budget Category Tab

Figure 6-4 Expenditure Categories Window, Budget Category Tab

Expenditure Category	Description	Sponsor Budget Category	Personnel Attached
Faculty Salary	Faculty Salary	Direct Labor Costs	<input checked="" type="checkbox"/>
Staff Salary	Support Staff Salary	Direct Labor Costs	<input checked="" type="checkbox"/>
Consultancy	Consultant Cost	Consultant Costs	<input type="checkbox"/>
Equipment	Capital Equipment	Purchased Equipment	<input type="checkbox"/>
Materials and Consumables	Materials and Consumables	Materials and Purchased Items	<input type="checkbox"/>
Travel	Travel Cost	Total Travel Costs	<input type="checkbox"/>
Patient Care Costs	Patient Care Costs	Participant Total	<input type="checkbox"/>
Alterations and Renovations	Alterations and Renovations Co	Alterations and Renovations	<input type="checkbox"/>
Other Costs	Other Costs	Other Direct Costs	<input type="checkbox"/>
Consortium/Contractual Costs	Sub-contract Costs	Subcontract	<input type="checkbox"/>
Operations	Operations	Profit or Fee	<input type="checkbox"/>
Administration	Administration	Direct Labor Costs	<input type="checkbox"/>

Expenditure Types

Expenditure Categories Window, Effective Dates Tab

Figure 6-5 Expenditure Categories Window, Effective Dates Tab

The screenshot shows a software window titled "Expenditure Categories" with two tabs: "Budget Category" and "Effective Dates". The "Effective Dates" tab is active, displaying a table with the following data:

Expenditure Category	Description	Start Date	End Date
Faculty Salary	Faculty Salary	01-JUL-1997	
Staff Salary	Support Staff Salary	01-JUL-1997	
Consultancy	Consultant Cost	24-MAR-2000	
Equipment	Capital Equipment	01-JUL-1997	
Materials and Consumables	Materials and Consumables	01-JUL-1997	
Travel	Travel Cost	01-JUL-1997	
Patient Care Costs	Patient Care Costs	01-JUL-1997	
Alterations and Renovations	Alterations and Renovations Co	01-JUL-1997	
Other Costs	Other Costs	01-JUL-1997	
Consortium/Contractual Costs	Sub-contract Costs	01-JUL-1997	
Operations	Operations	01-JUL-1997	
Administration	Administration	01-JUL-1997	

At the bottom right of the window, there is a button labeled "Expenditure Types".

Expenditure Categories Window Description

Table 6–3 Expenditure Categories Window Description

Field Name	Type	Features	Description
Budget Category Tab			
Expenditure Category	required		user-defined cost classifications that expenditure items are assigned to
Description	optional		expenditure category description
Sponsor Budget Category	required	list of values	system-defined pricing data from 194 Transaction Set; a budget classification, of which expenditure types are subsets. For example, Supplies is a budget category, of which Chemicals and Beakers are specified as expenditure types. Expenditure types are associated with a budget category.
Personnel Attached	optional	check box	selected if a budget category is associated with the use of persons. For example, the expenditure category of Salary typically lists persons whose salary is requested on the budget.
Effective Dates Tab			
Expenditure Category	required		user-defined cost classifications that expenditure items are assigned to
Description	optional		expenditure category description
Start Date	required	list of values: pop-up calendar	starting date of expenditure category; default is current date, but users can change the date
End Date	optional	list of values: pop-up calendar	ending date of expenditure category
Expenditure Types		button	opens Expenditure Types window where users enter expenditure types

Expenditure Types Window Description

Table 6-4 *Expenditure Types Window Description*

Field Name	Type	Features	Description
Expenditure Type	required		user-defined cost classifications assigned to each expenditure item
Description	optional		text describing expenditure type
Start Date	required	list of values: pop-up calendar	start date of expenditure type
End Date	optional	list of values: pop-up calendar	end date of expenditure type
OK		button	confirms action and closes window or accepts selected data
Cancel		button	closes window without saving

Assigning Expenditure Categories to Rate Class and Rate Type Pairs Procedure

In the Assign Expenditure Categories window, users add the expenditure categories that are eligible for indirect cost calculations, given the selected rate class and rate type, to the Applicable Expenditure Categories fields. Conversely, users remove the expenditure categories that are ineligible for indirect calculations from the Applicable Expenditure Categories fields.

To assign expenditure categories to rate class and rate type pairs, perform the following steps.

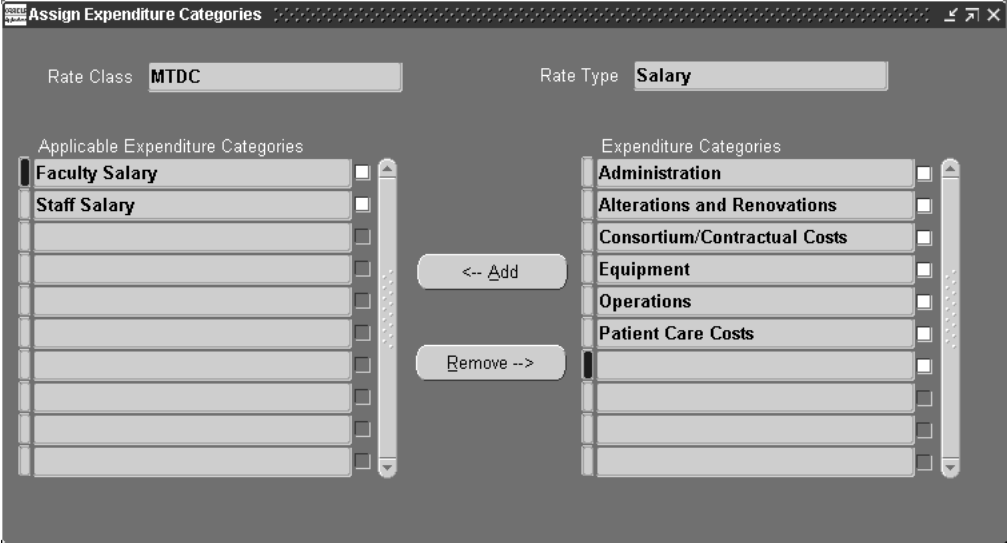
1. In Grants Proposal, navigate to the Assign Expenditure Categories window as follows:

Setup - Budgets - Assign Expenditure Categories

2. In the Rate Class field, use the down-arrow key to select the appropriate rate class.
3. In the Rate Type field, use the down-arrow key to select the appropriate rate type.
4. To remove a particular expenditure category from a rate class and rate type pair, select an expenditure category in the Applicable Expenditure Categories field, select the check box to the right of the field, and click **Remove**.
5. To assign a particular expenditure category from a rate class and rate type pair, select an expenditure category in the Expenditure Categories field, select the check box to the right of the field, and click **Add**.
6. Save or save and continue as follows:
File - Save or Save and Proceed
7. Close the window.

Assign Expenditure Categories Window

Figure 6-7 Assign Expenditure Categories Window



Assign Expenditure Categories Window Description

Table 6–5 *Assign Expenditure Categories Window Description*

Field Name	Type	Features	Description
Rate Class	display only		displays rate classes defined in Rate Classes and Rate Types window
Rate Type	display only		displays rate types corresponding to rate class in the Rate Class field
Applicable Expenditure Categories	optional		expenditure categories that are eligible for indirect cost calculations
[check box]	optional	check box	if selected, applicable expenditure category moves to Expenditure Categories field when users click Remove
Expenditure Categories	optional		expenditure categories that are ineligible for indirect cost calculations
[check box]	optional	check box	if selected, expenditure category moves to the Applicable Expenditure Categories field when users click Add
Add		button	expenditure category moves to Applicable Expenditure Categories field
Remove		button	applicable expenditure category moves to the Expenditure Categories field

Defining a Sponsor Budget Hierarchy Procedure

Users define budget hierarchies to specify how to aggregate sponsor budget components according to a sponsor's specifications. Grants Proposal provides users with a seeded budget hierarchy for 194 Transaction Set (TS). To view the 194 TS sponsor budget hierarchy, see [Electronic Proposal Submission](#), page E-1.

To define a budget hierarchy, perform the following steps.

1. In Grants Proposal, navigate to the Sponsor Budget Hierarchy window as follows:

Setup - Budgets - Sponsor Budget Hierarchy

2. Enter data in each field of the Sponsor Budget Hierarchy window as described in [Table 6-6](#), page 6-27.
3. Save or save and continue as follows:
File - Save or Save and Proceed
4. Close the window.

Sponsor Budget Hierarchy Window

Figure 6–8 Sponsor Budget Hierarchy Window

The screenshot shows a window titled "Sponsor Budget Hierarchy" with a "Hierarchy Name" field containing "194TS". The window is divided into two main sections: "Parent Category" and "Child Category".

Parent Category

Sponsor Budget Category	Code
Other Direct Costs	03
Total Indirect Costs	09
Total Amount Requested	28
Total Project Cost	36
Total Cost (Direct & F&A)	38

Child Category

Sponsor Budget Category	Code	Overhead Flag	No of Subordinates
Alterations and Renovations	87	<input type="checkbox"/>	0
Animal Costs	86	<input type="checkbox"/>	0
Commercial Effort	46	<input type="checkbox"/>	0
Computer Automated Data Processing	82	<input type="checkbox"/>	0
Consultant Costs	81	<input type="checkbox"/>	0

Sponsor Budget Hierarchy Window Description

Table 6–6 Sponsor Budget Hierarchy Window Description

Field Name	Type	Features	Description
Hierarchy Name	required		hierarchy name; default is 194 TS
Parent Category Region			
Sponsor Budget Category	required	list of values	seeded sponsor budget categories; list of values shows budget categories that are not currently a parent category
Code	display only		sponsor-defined code; field automatically populates when users select a sponsor budget category
Child Category Region			
Sponsor Budget Category	required	list of values	seeded sponsor budget categories; list of values shows budget categories that are not currently a child category
Code	display only		sponsor-defined code; field automatically populates when users select a sponsor budget category
Overhead Flag	optional	check box	if selected, specifies sponsor budget category that contains the overhead amount for labor; users select only one Overhead Flag check box.
No of Subordinates	display only		system-calculated; number of children that each budget category has

Questions Setup

This chapter describes how to set up and modify organization-specific questions, proposal-specific questions, and individual-specific questions. The following sections are in this chapter:

- [Definition](#)
- [Overview](#)
- [Setting Up Questions Procedure](#)
- [List of Questions Window](#)
- [List of Questions Window Description](#)
- [Modifying Questions Procedure](#)
- [Question Detail Window, Explanation Tab](#)
- [Question Detail Window, Policy Tab](#)
- [Question Detail Window, Regulation Tab](#)
- [Question Detail Window Description](#)

Definition

Users set up questions that relate to assurance, compliance, and certification issues by sponsors. Many sponsors require that responses to these questions be included with the proposal before funding is considered. Users enter three types of questions in questions setup; organization-specific, proposal-specific, and individual-specific. All questions are answered Yes, No, or NA.

Overview

Questions must be set up before they can be used in Oracle Grants Proposal. Typically, the organization's Sponsored Research Office sets up and maintains the list of questions. Only authorized personnel can add to or modify the questions.

The Proposal Manager typically answers proposal-specific questions during proposal preparation. Organization-specific questions pertain to information at the organizational level and are answered once by the organization's Sponsored Research Office. Individual-specific questions relate to and are answered by the Proposal Manager and all key personnel listed on the proposal.

As needed, responses to applicable questions are attached to the proposal or included in the EDI flat file. Applicable questions are those that are answered Yes or No. The process of attaching applicable questions to the proposal via the flatfile is not visible to users and occurs automatically.

Setting Up Questions Procedure

To set up questions or add new questions, perform the following steps.

1. In Grants Proposal, navigate to the List of Questions window as follows:

Setup - Questions

2. Click **New**.

The Question Detail window appears.

3. In the Question Number field, enter the question number.
4. In the Applies To field, select the entity that the question applies to from the drop-down list.
5. In the Effective Dates fields, select the question starting and ending dates from the pop-up calendar.
Note: The question ending date is optional.
6. In the Question field, enter the question.
7. If an explanation is required when the answer to the question is Yes during proposal preparation, select the Yes check box.
8. If an explanation is required when the answer to the question is No during proposal preparation, select the No check box.
9. If an internal review date is required when the answer to the question is Yes during proposal preparation, select the Yes check box.
10. If an internal review date is required when the answer to the question is No during proposal preparation, select the No check box.
11. If an explanation is associated with the question, select the Explanation tab, and enter the explanation in the field.
12. If a policy is associated with the question, select the Policy tab, and enter the policy in the field.
13. If a regulation is associated with the question, select the Regulation tab, and enter the regulation in the field.

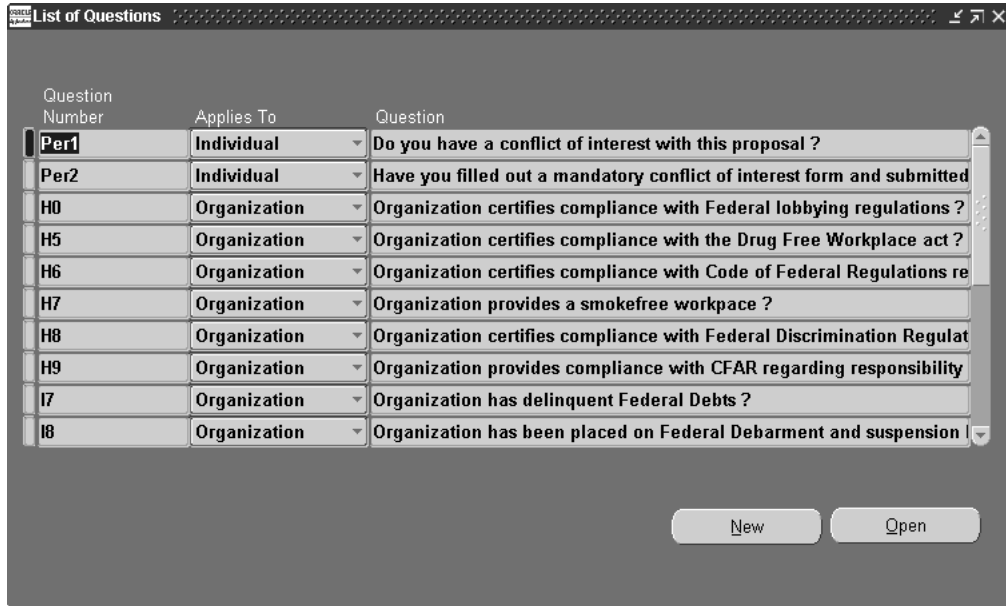
14. Save or save and continue as follows:

File - Save or Save and Proceed

15. Close the window.

List of Questions Window

Figure 7-1 List of Questions Window



List of Questions Window Description

Table 7–1 *List of Questions Window Description*

Field Name	Type	Features	Description
Question Number	display only		user-defined unique question identifier; displays question number
Applies To	display only		system-defined; options are Organization, Proposal, or Individual. Displays to whom or what the question applies.
Question	display only		displays question that applies to organization, proposal, or individual
New		button	opens Question Detail window so users can setup questions or add new questions
Open		button	opens Question Detail window so users can modify existing questions

Modifying Questions Procedure

1. In Grants Proposal, navigate to the List of Questions window as follows:

Setup - Questions

2. To view all the existing questions, go to the Query Menu and select Find All.

The List of Questions window is populated with all existing questions.

3. To modify a question, select the question that users want to change and click **Open**.

The Question Detail window appears with the data displayed for the question selected.

4. Modify data, as appropriate, as described in [Table 7-2](#), page 7-11.

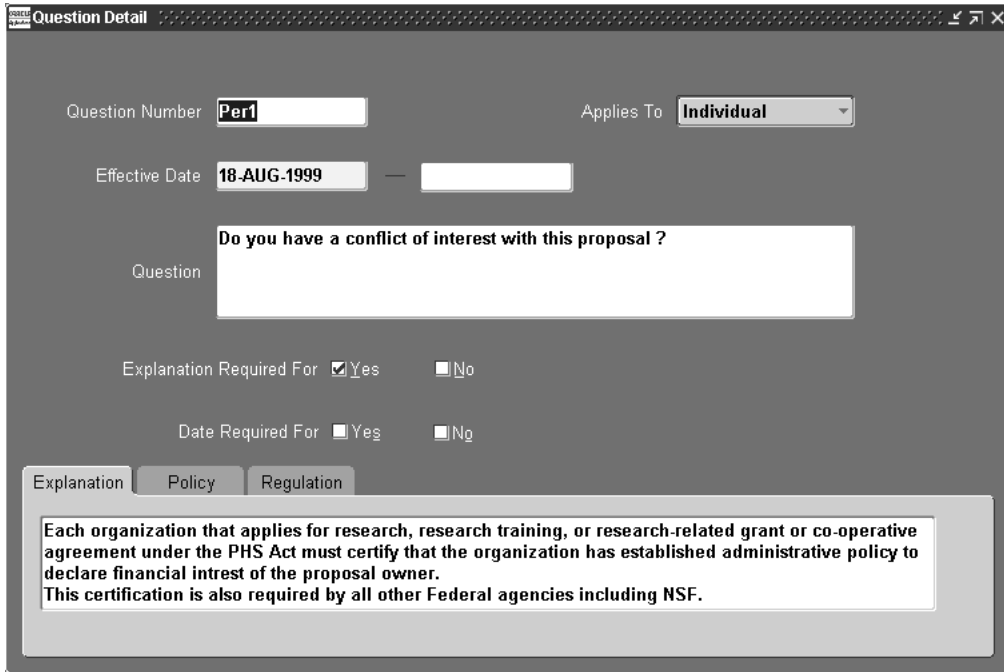
5. Save or save and continue as follows:

File - Save or Save and Proceed

6. Close the window.

Question Detail Window, Explanation Tab

Figure 7–2 Question Detail Window, Explanation Tab



Question Detail

Question Number Applies To

Effective Date —

Question

Explanation Required For Yes No

Date Required For Yes No

Explanation Policy Regulation

Each organization that applies for research, research training, or research-related grant or co-operative agreement under the PHS Act must certify that the organization has established administrative policy to declare financial interest of the proposal owner. This certification is also required by all other Federal agencies including NSF.

Question Detail Window, Policy Tab

Figure 7-3 Question Detail Window, Policy Tab

Question Detail

Question Number Applies To

Effective Date —

Question

Explanation Required For Yes No

Date Required For Yes No

Explanation Policy Regulation

Final Rule, 42 CFR Part 50, Subpart F, "Responsibility of Applicants for Promoting Objectivity in Research for which PHS Funding is sought."

Question Detail Window, Regulation Tab

Figure 7-4 Question Detail Window, Regulation Tab

Question Detail

Question Number Applies To

Effective Date —

Question

Explanation Required For Yes No

Date Required For Yes No

Explanation Policy Regulation

Question Detail Window Description

Table 7-2 Question Detail Window Description

Field Name	Type	Features	Description
Question Number	required		unique identifier of a question; can be user-defined or government-defined. The Question Number field is not updatable.
Applies To	required	drop-down list	system-defined; options include Organization, Proposal, or Individual.
Effective Dates	required	list of values: pop-up calendar	starting date question is effective from; defaults to system date that users can change
-	optional	list of values: pop-up calendar	ending date question is effective to
Question	required		question being modified or added
Explanation Required For--Yes	optional	check box	if selected, explanation is required when response to question is Yes during proposal preparation
Explanation Required For--No	optional	check box	if selected, explanation is required when response to question is No during proposal preparation
Date Required For--Yes	optional	check box	if selected, internal review date is required when response to question is Yes during proposal preparation
Date Required For--No	optional	check box	if selected, internal review date is required when response to question is No during proposal preparation
Explanation Tab			
[blank field]			displays explanation pertaining to question
Policy Tab			
[blank field]			displays policy pertaining to question
Regulation Tab			
[blank field]			displays regulation pertaining to question

Maps Setup

This chapter describes how to set up maps. The following sections are in this chapter:

- [Definition](#)
- [Overview](#)
- [Setting Up Maps Procedure](#)
- [Maps Window](#)
- [Maps Window Description](#)

Definition

A map is the hierarchy and sequence of proposal approval stops, including the signatory authorities within each stop. Maps list both primary and alternate approvers. An alternate approver signs the proposal in the event the primary approver is unavailable.

Overview

Maps must be set up to ensure proper functioning of Oracle Grants Proposal.

A proposal is routed to a series of proposal stops for review and approval by organization personnel for accuracy and for compliance with sponsor policies. A proposal stop is an office or department within the organization that reviews specific proposal information.

When a proposal is routed electronically, a map is automatically selected based on the business rule. Oracle Workflow sends notification to the first approver, and to the alternate approver if any, informing them that a proposal is available for approval. The approver either approves the proposal or rejects it. If the approver approves the proposal, it is sent to the next approver on the map. The process continues until all approvers listed on the map have approved the proposal.

Setting Up Maps Procedure

To set up maps, perform the following steps.

1. In Oracle Grants Proposal, navigate to the Maps window as follows:

Setup - Maps

2. Enter data in each field of the window as described in [Table 8-1](#), page 8-5.

3. Save or save and continue as follows:

File - Save or Save and Proceed

4. Close the window.

Maps Window

Figure 8–1 Maps Window

The screenshot shows a window titled "Maps" with two sections: "Maps" and "Map Details".

Maps Section:

Organization Name	Map Name	Start Date	End Date
Administration	NH-Administration Approval Map	31-MAY-2000	
Administration	NH-Administration Notif. map	31-MAY-2000	
Information Systems	Chair's Approval Map	01-JAN-2000	
Information Systems	F&A Deviation Approval Map	01-JAN-2000	
Information Systems	Underrecovery Approval Map	01-JAN-2000	

Map Details Section:

Approver Type	Stop Num	Person Name	User Name
Primary Approver	1	Ross, Doctor Elizabeth	EROSS
Alternate Approver	1	Mehringner, Doctor Robert	RMEHRINGER

Maps Window Description

Table 8–1 *Maps Window Description*

Field Name	Type	Features	Description
Maps Region			
Organization Name	required	list of values	organization name; department or unit
Map Name	required		map name
Start Date	required	list of values: pop-up calendar	beginning map effective date
End Date	optional	list of values: pop-up calendar	ending map effective date
Map Details Region			
Approver Type	required	drop-down list	approver type; options are Primary Approver or Alternate Approver
Stop Num	display only		system-generated number that indicates sequence of approval stop on approval map; each primary approver is assigned a new stop number
Person Name	required	list of values	full name of primary or alternate approver
User Name	default		user name of primary or alternate approver

Business Rules Setup

This chapter describes how to set up business rules. The following sections are in this chapter:

- [Definition](#)
- [Overview](#)
- [Prerequisites](#)
- [Defining Business Rules Procedure](#)
- [Create Business Rules Window, Rule Name, Sequence Tab](#)
- [Create Business Rules Window, Map, Valid Flag Tab](#)
- [Create Business Rules Window, Effective Dates Tab](#)
- [Create Business Rules Window Description](#)

Definition

A business rule is a prescribed mathematical method that determines how a proposal is routed during the approval process. It includes a user-defined condition. If the condition is true, the proposal is routed electronically to a hierarchical list of approvers for review through an approval map.

An approval map is the sequence of approval stops and the signatory authorities within each stop. Each approval stop can have one or more approvers.

Overview

Business rules must be set up to ensure proper functioning of Oracle Grants Proposal.

A business rule is created by building a logical condition and selecting an approval map that applies to the proposal if this condition is true. Each business rule results in the selection of only one approval map.

Oracle Grants Proposal allows users to create business rules at any organizational level. If multiple business rules are created for an organization, users can order them by assigning sequence numbers. This ordering determines the sequence in which the proposal is routed to the associated approval maps, if more than one map is activated.

Conditions and Expressions

The condition in a business rule contains one or more expressions. An expression has a left hand side value (Lvalue) and a right hand side value (Rvalue) that are separated by a mathematical operator, such as $>$, $<$, or $=$. The left hand side value of an expression is associated with an expression type of column, function, or question. Users build an expression by selecting a seeded value in the Lvalue field that is linked to the selected expression type. Values available in the Lvalue field are dependent upon the expression type selected.

Multiple expressions can be linked with logical operators AND or OR. For example, a condition consisting of two expressions can be constructed as follows:

(Total Cost \leq 100,00 AND Cost Share Amount \geq 50,000)

When the expressions are true, the condition is true, and the associated approval map is selected by Oracle Workflow for proposal routing.

Business Rules Evaluation Example

A proposal is ready for approval routing when the following conditions are satisfied:

- narrative status is either Complete or None
- budget status is either Complete or None

To submit the proposal for approval, the user selects the proposal in the Proposals window, goes to the Tools Menu, and selects Submit for Approval.

During the approval process, each business rule for the lead unit identified in the proposal is evaluated against the proposal content. Only those business rules are activated whose conditions are satisfied by the proposal content. The sequence specified for each business rule determines the order that business rules are applied to the proposal.

The system evaluates the business rules' expressions by substituting actual budget values in place of the variables in the business rules' expressions.

For example, suppose a business rule expression is the following:

If Total Cost > 1,000,000, select Map A

Suppose the proposal users submit has a Total Cost of \$2,000,000. When the proposal is submitted, the system substitutes the Total Cost variable with 2,000,000 and the expression becomes the following:

If 2,000,000 > 1,000,000, select Map A

The expression is evaluated as true and Map A is selected for routing.

In addition to sequential execution of business rules, the system also executes business rules hierarchically. Business rules are evaluated for each organization or department according to the organizational hierarchy, starting with the organization preparing the proposal and ending with the top-most organization.

For example, suppose three departments--A, B, and C--exist in an organization. The lead unit is Department C, which is preparing the proposal. Department C is at the bottom-most level, Department A is at the top-most level, and Department B is between A and C.

The system evaluates the business rules for Department C by selecting the applicable business rules and corresponding maps and orders them according to the user-defined sequence. The system then evaluates the business rules for Department B in the same manner, followed by Department A.

Types of Business Rules

Users define the following types of business rules:

- validation business rule
- notification business rule
- routing business rule

A validation business rule validates or invalidates certain conditions of the proposal. It does not seek approval. An example of a validation business rule is the following: If the underrecovery amount \geq \$10,000, then the proposal is invalid.

A notification business rule notifies personnel of an activity, but it does not require approval. Everyone in the applicable map is notified that the proposal has been submitted for approval and routing. An example of a notification business rule is the following: If the sponsor type is a Foundation in a proposal, then notify the Dean when the proposal is submitted. Organizations can have more than one notification business rule.

A routing business rule specifies the sequence of proposal stops for review and approval. Users can assign a sequence to all routing business rules for a given organization. Each routing business rule is associated with a specific approval map. A proposal is routed for approval based upon the user-defined sequence.

An example of a routing business rule is the following: If an organization has three routing business rules, then the proposal is routed to the approval map that comes first in the sequence. When all the approvers in the first map approve the proposal, the proposal is routed to the second approval map in the sequence. When all the approvers in the second map approve the proposal, the proposal is routed to the third approval map in the sequence. The approval process does not advance further until all the approvers listed in the maps approve the proposal. If any approver in any applicable map rejects the proposal, the proposal is not routed any further.

Business rule types are applied by the system in a particular order. When a proposal is routed electronically for approval, the validation business rule is applied first, then the notification business rule, and finally the routing business rule. When a proposal is approved by all approvers it has been routed through, it is considered approved within the organization and is ready for submission to the sponsor.

References

For information on approval maps, see [Maps Setup](#), page 8-1.

Prerequisites

- ❑ Before setting up business rules, users must set up approval maps.
To set up approval maps, see [Maps Setup](#), page 8-1.

Defining Business Rules Procedure

To define business rules, perform the following steps.

1. In Oracle Grants Proposal, navigate to the Create Business Rules window as follows:

Setup - Business Rules

2. Select the Rule Name, Sequence tab.
3. In the Organization field, select an organization from the list of values for which the business rule is being created.
4. In the Rule Type field, select a business rule type from the drop-down list.
5. In the Rule Name field, enter a name for the business rule.
6. In the Sequence field, enter a value to specify the sequence of the routing business rule when more than one business rule applies to the proposal.

Note: The Sequence field is applicable to routing business rules only.

7. Select the Map, Valid Flag tab.
8. If the business rule type is routing or notification, then in the Map field, select an approval map from the list of values.

Note: Only the maps that have been created for the selected organization are displayed in the list of values.

9. If the business rule type is validation, then in the Valid Flag field, specify whether the validation business rule is Valid or Invalid by selecting the appropriate term from the drop-down list.

Note: Valid or Invalid only applies to a validation business rule type.

10. Select the Effective Dates tab.
11. In the Start Date field, select the starting date from the list of values pop-up calendar that the business rule is effective. The default date is the current date. Change the date if appropriate.
12. In the End Date field, optionally select the ending date from the list of values pop-up calendar that the business rule is effective.
13. In the Expression Type field, select an expression type from the drop-down list.

Note: The Expression Types of Column, Function, and Question are used to build a condition. A condition is built by combining one or more expressions

relating to a business rule. Each line in the Create Business Rules window, extending from the Lbrackets field through the Rbrackets field, constitutes an expression.

14. In the Lbrackets field, optionally enter one or more left parentheses to build a business rule expression.
15. In the Lvalue field, select a left value from the list of values.
16. In the Operator field, select the appropriate mathematical symbol from the list of values.
17. In the Rvalue field, enter a right value.
18. In the Rbrackets field, optionally enter one or more right parentheses to build a business rule expression.
19. In the Logical Operator field, optionally select the appropriate logical operator from the drop-down list to link expressions.
20. Repeat Steps 13 to 19 to enter all expressions in the business rule, along with the logical operators connecting them.
21. Save or save and continue as follows:
File - Save or Save and Proceed
22. Close the window.

Create Business Rules Window, Rule Name, Sequence Tab

Figure 9-1 Create Business Rules Window, Rule Name, Sequence Region

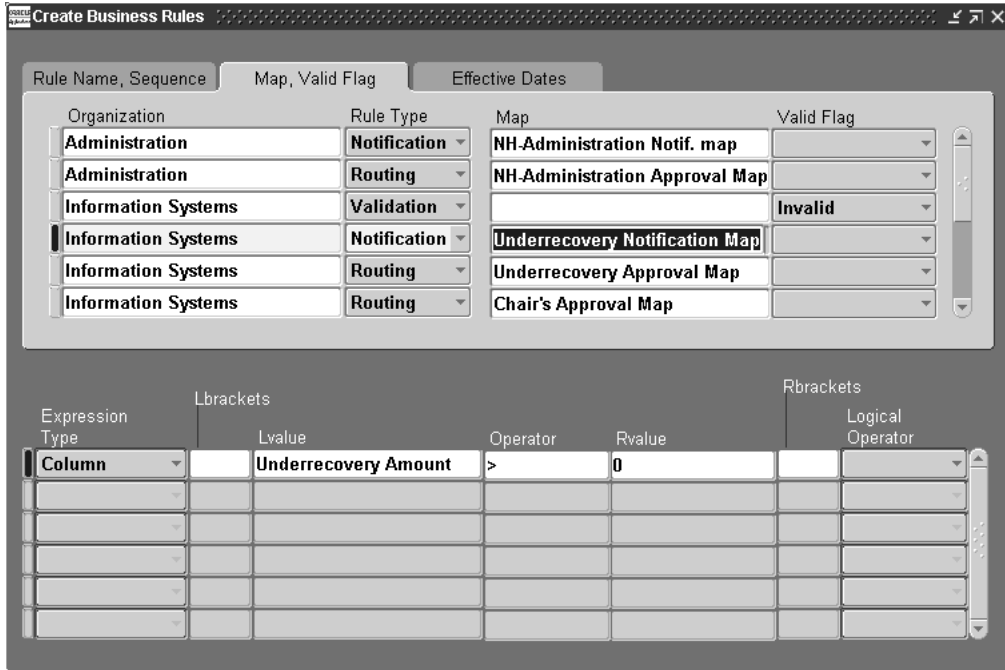
The screenshot shows the 'Create Business Rules' window with three tabs: 'Rule Name, Sequence', 'Map, Valid Flag', and 'Effective Dates'. The 'Rule Name, Sequence' tab is active, displaying a list of rules. Below the list is an expression editor with columns for Expression Type, Lbrackets, Lvalue, Operator, Rvalue, and Logical Operator.

Organization	Rule Type	Rule Name	Sequence
Administration	Notification	NH-Administration notification map	
Administration	Routing	NH-Administration routing map	1
Information Systems	Validation	Info System Validation Rule	
Information Systems	Notification	Underrecovery Notification Rule	
Information Systems	Routing	Info System Routing Rule	1
Information Systems	Routing	Info System Chair's Approval	2

Expression Type	Lbrackets	Lvalue	Operator	Rvalue	Logical Operator
Column		Underrecovery Amount	>	0	

Create Business Rules Window, Map, Valid Flag Tab

Figure 9–2 Create Business Rules Window, Map, Valid Flag Tab



Create Business Rules Window, Effective Dates Tab

Figure 9-3 Create Business Rules Window, Effective Dates Tab

The screenshot shows the 'Create Business Rules' window with the 'Effective Dates' tab selected. The window contains a table of rules and an expression builder below it.

Organization	Rule Type	Start Date	End Date
Administration	Notification	26 JUN 2000	
Administration	Routing	26 JUN 2000	
Information Systems	Validation	25 JUN 2000	
Information Systems	Notification	25 JUN 2000	
Information Systems	Routing	25 JUN 2000	
Information Systems	Routing	25 JUN 2000	

Expression Type	Lbrackets	Lvalue	Operator	Rvalue	Rbrackets	Logical Operator
Column		Underrecovery Amount	>	0		

Create Business Rules Window Description

Table 9–1 Create Business Rules Window Description

Field Name	Type	Features	Description
Organization	required	list of values	user-defined entity that users create the business rule for; organization can be any entity within organization's hierarchy
Rule Type	required	drop-down list	system-defined business rule types; options are Routing, Notification, or Validation
Rule Name	required		user-defined business rule description
Sequence	optional		user-defined business rule sequence for routing business rules when more than one business rule applies; when users select appropriate organization, rule sequence defaults in Sequence field; users can change rule sequence
Map	required for routing and notification rules only	list of values	user-defined approval maps
Valid Flag	required for validation rules only	drop-down list	system-defined; options are Valid or Invalid; specifies whether the proposal is valid or invalid given condition
Start Date	required	list of values: pop-up calendar	start date that business rule is effective; default date is system date
End Date	optional	list of values: pop-up calendar	end date that business rule is effective
Expression Type	required to build an expression	drop-down list	system-defined variables used to build a business rule; options are Column, Function, or Question.
Lbrackets	optional		left parenthesis used to build an expression
Lvalue	required	list of values	seeded values; available options depend upon the option selected in Expression Type field

Table 9–1 Create Business Rules Window Description

Field Name	Type	Features	Description
Operator	required if building an expression	list of values	symbol for expressing mathematical equation; options are =, <>, <=, >=, <, or > which stand for Equals, Not Equal to, Equal to or Less Than, Equal to or Greater Than, Less Than, and Greater Than. If users select Function or Question as expression type, the = and <> operators are available from the list of values. If users select Column as the expression type, the =, <>, <=, and >= operators are available from the list of values.
Rvalue	required if building an expression	list of values, except when the expression type is Column	user-defined; can be an amount, a date, or text, depending on what the Lvalue is. Available options depend upon the Lvalue selected.
Rbrackets	optional		right parenthesis used to build an expression
Logical Operator	required if the expression being built is not the last one	drop-down list	system-defined; words that link expressions. Options include AND or OR

10

Organization Details Setup

This chapter describes how to set up organization details, set up organization types, and answer organization-specific questions. The following sections are in this chapter:

- [Definition](#)
- [Overview](#)
- [Prerequisites](#)
- [Setting Up Organization Details Procedure](#)
- [Organization Details Window, Organization Details Tab](#)
- [Organization Details Window, Unit Details Tab](#)
- [Organization Details Window Description](#)
- [Organizaton Types Window](#)
- [Organizaton Types Window Description](#)
- [Organization Questions Window](#)
- [Organization Questions Window Description](#)

Definition

Organization details is the set of information specific to the organization that is required by various sponsors when users submit proposals. This information is typically not maintained in the Oracle Human Resource Management Systems database.

Overview

Organization details must be set up to ensure proper functioning of Oracle Grants Proposal.

Sponsors use the organization details to identify specific attributes of the submitting organization through the use of code numbers that act as identifiers.

Setting up organization details includes entering organization-specific data, specifying the organization type, and answering organization-specific questions required by sponsors.

When users are ready to submit a proposal to the sponsor, the responses to applicable organization-specific questions are attached to the proposal via an EDI flat-file. Applicable questions are those that are answered Yes or No. Sponsors receive the answers to all the organization-specific questions answered Yes or No. Questions that are answered NA, which means Not Applicable, are not attached to the EDI flat file for submission to the sponsor. The process of attaching applicable questions to the proposal via the flat file is invisible to users and occurs automatically.

Prerequisites

- ❑ Before setting up organization details, the organization must exist in the Human Resource Management Systems database.

To set up organizations in Human Resource Management Systems, see [Creating an Organization, Using Oracle HRMS - The Fundamentals](#).

Setting Up Organization Details Procedure

Different sponsors require different sets of organization-specific data. This procedure is a one-time setup. Usually user intervention is not required until the information changes.

To set up organization details, perform the following steps.

1. In Grants Proposal, navigate to the Organization Details window as follows:

Setup - Organization Details

2. Select the Organization Details tab.
3. Enter data in each field of the Organization Details window, Organization Details tab, as described in [Table 10-1](#), page 10-7.
4. Save or save and continue as follows:

Action - Save or Save and Proceed

Setting Up Organization Types

5. To set up organization types, click **Organization Types**.

The Organization Types window appears.

6. Enter data in each field of the Organization Types window as described in [Table 10-2](#), page 10-10.
7. Click **OK**.

Answering Organization-Specific Questions

8. To answer organization-specific questions, click **Organization Questions**.

The Organization Questions window appears.

Note: The organization's Sponsored Research Office typically sets up, maintains, and answers the organization-specific questions. This is a one-time setup.

9. Select the appropriate question number to answer.
10. Select the corresponding Yes or No radio button to answer the selected organization-specific question.

NA is the default value for each question.

11. Click **OK**.
12. Select the **Unit Details** tab.
13. In the **Organization** field, select the organization or department that coordinates and administers the proposal development tasks
14. In the **Administrative Official** field, optionally select the name of the official from the list of values who is authorized to sign on behalf of the lead unit through which the proposal is prepared.
15. In the **Major Subdivision** field, optionally select the subdivision or parent organization of the lead unit.
16. Save or save and continue as follows:
Action - Save or Save and Proceed
17. Close the window.

Organization Details Window, Organization Details Tab

Figure 10–1 Organization Details Window, Organization Details Tab

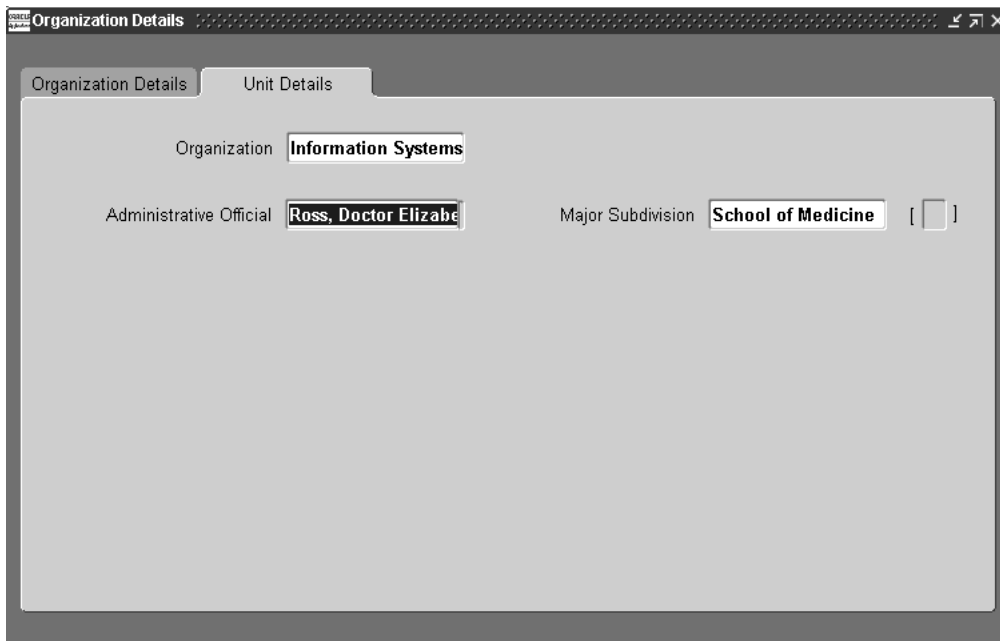
The screenshot displays the 'Organization Details' window with the following data:

Field	Value
Organization	Progress Public
Signing Official	Baldwin, Doctor Den
Congressional District	11
Organization IPF Code	7654321
DUNS Number	123456789
EIN	1234-5678
DODAAC Number	445566
TIN	112233
NSF Institutional Code	1234567
DUNS+4 Number	8901
CAGE Number	5678
Human Exemption Number	M-1234
Human Assurance Number	H-0987
Animal Assurance Number	A-4567
DHHS Agreement	
DHHS Agreement Date	20-APR-1999
DHHS Agreement being negotiated with	Western Region Offi
No DHHS Agreement, but rate established with	
Regional Office	
Date	[]

Buttons: Organization Types, Organization Questions

Organization Details Window, Unit Details Tab

Figure 10–2 Organization Details Window, Unit Details Tab



Organization Details Window Description

Table 10–1 Organization Details Window Description

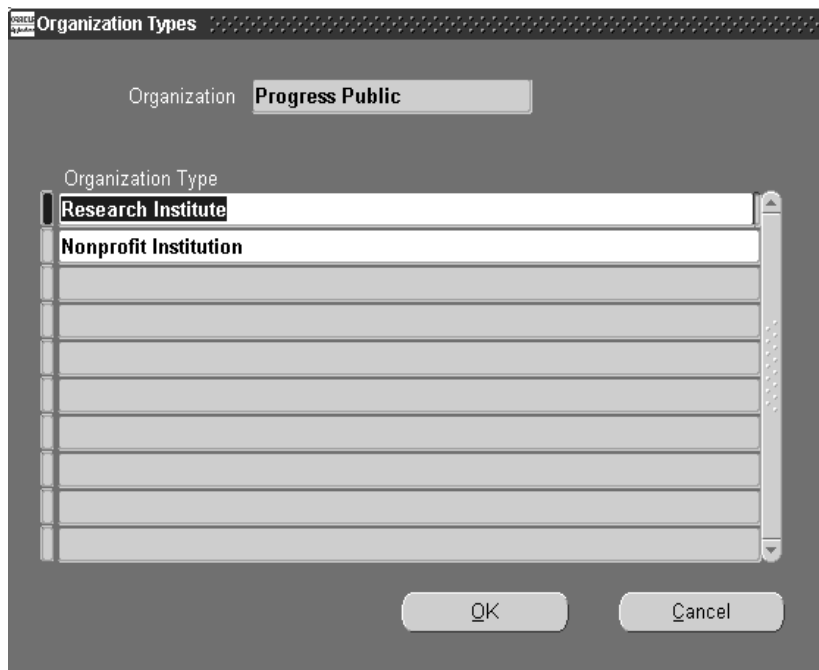
Field Name	Type	Features	Description
Organization Details Tab			
Organization	display only		organization that is submitting proposal; automatically populated
Signing Official	optional	list of values	person who approves proposal; official within organization who has the signatory authority to sign for organization on proposals
Congressional District	optional		used to indicate Congressional District in which project is performed as specified in Federal Agency grant application instructions
Organization IPF Code	optional		Institutional Profile Code
DUNS Number	optional		identification code used to identify entity
EIN	optional		Entity Identification Number
DODAAC Number	optional		Department of Defense Activity Address Code
TIN	optional		Taxpayer's Identification Number
NSF Institutional Code	optional		code that National Science Foundation assigns to each submitting organization.
DUNS+4 Number	optional		identification code used to identify entity
CAGE Number	optional		Commercial and Government Entity number
Human Exemption Number	optional		code assigned to submitting organization by appropriate federal agency after the organization's research procedures have been reviewed and found to be in compliance
Human Assurance Number	optional		code assigned to submitting organization by appropriate federal agency after organization's research procedures have been reviewed and found to be in compliance
Animal Assurance Number	optional		code assigned to submitting organization by the appropriate federal agency after organization's research procedures have been reviewed and found to be in compliance

Table 10–1 Organization Details Window Description

Field Name	Type	Features	Description
DHHS Agreement Region			
DHHS Agreement Date	optional	list of values: pop-up calendar	Division of Health and Human Services agreement date
DHHS Agreement being negotiated with Regional Office	optional		name of regional office that the Division of Health and Human Services agreement is being negotiated with
No DHHS Agreement, but rate established with Regional Office	optional		name of the regional office that indirect cost rate agreement is established with
Date	optional	list of values: pop-up calendar	date that agreement or rate is executed or established
Descriptive Flexfield	optional		field for user customization
Organization Types		button	opens Organizaton Types window where users specify organization types
Organization Questions		button	opens Organization Questions window where users answer organization-specific questions
Unit Details Tab			
Organization	required	list of values	organization or department that coordinates and administers proposal development tasks
Administrative Official	optional	list of values	official authorized to sign on behalf of organization through which proposal is submitted
Major Subdivision	optional	list of values	parent organization of lead unit. Seeded options are School of Allied Health, School of Dentistry, School of Medicine, School of Nursing, School of Optometry, School of Osteopathy, School of Pharmacy, School of Podiatric Medicine, School of Public Health, and School of Veterinary Medicine
Descriptive Flexfield	optional		field for user customization

Organizaton Types Window

Figure 10-3 Organizaton Types Window



Organizaton Types Window Description

Table 10–2 Organizaton Types Window Description

Field Name	Type	Features	Description
Organization	default, display only		name of organization; defaults from Organization Details window
Organization Type	optional	list of values	system-defined organization types; options are Federal Facility, Federal Government, For-Profit, Hospital, Individual, Local Government, Minority Business, Minority Institution, Minority-Owned Business, Large; Minority-Owned Business, Small; Non-Profit, Program Participant Firm, Research Institute, Small Business, Small Business 1, Small Disadvantaged Business, State, State Government, Woman Owned Business. Users can modify existing organization types and add additional ones.
OK		button	confirms action and closes window or accepts selected data
Cancel		button	closes window without saving

Organization Questions Window

Figure 10-4 Organization Questions Window

Organization Name

Question Number	Description	Yes	No	NA
H0	Organization certifies compliance with Federal lobbying regulations ?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
H5	Organization certifies compliance with Drug Free Workplace act ?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
H6	Organization certifies compliance with code of Federal regulations .. ?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
H7	Organization provides a smokefree workplace ?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
H8	Organization certifies compliance with Federal Discrimination Regulations ?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
H9	Organization provides compliance with CFAR regarding responsibility ... ?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Explanation

Review Date

Organization Questions Window Description

Table 10–3 Organization Questions Window Description

Field Name	Type	Features	Description
Organization Name	default, display only		organization name; defaults from Organization Details window
Question Number	display only		question number
Description	display only		specifies organization-specific question
Yes		radio button	specifies that answer to the organization-specific question is Yes. Note: If users select Yes radio button in response to a selected question and the Explanation Required For-Yes check box was selected during questions setup in the Question Detail window, users must enter an explanation in Explanation field.
No		radio button	specifies that answer to organization-specific question is No Note: If users select the No radio button in response to a selected question and the Explanation Required For-No check box was selected during questions setup in the Question Detail window, users must enter an explanation in the Explanation field.
NA		radio button	specifies that answer to the organization-specific question is Not Applicable
Explanation	optional		explanation is required if users select the Yes radio button in response to a question and the Explanation Required For-Yes check box was selected during questions setup in the Question Detail window. An explanation is required if users select the No radio button in response to a question and the Explanation Required For-No check box was selected during questions setup in the Question Detail window.

Table 10–3 Organization Questions Window Description

Field Name	Type	Features	Description
Review Date	optional	list of values: pop-up calendar	internal review date is required if users select the Yes radio button in response to a question and the Date Required For-Yes check box was selected during questions setup in the Question Detail window. An internal review date is required in this field if users select the No radio button in response to a question and the Date Required For-No check box was selected during questions setup in the Question Detail window.
OK		button	confirms action and closes window or accepts selected data
Cancel		button	closes window without saving

Biographical Sketch Setup

This chapter describes how to setup biographical sketch information. The following sections are in this chapter:

- [Definition](#)
- [Overview](#)
- [Prerequisites](#)
- [Setting Up Biographical Sketch Information Procedure](#)
- [Biographical Sketch \(Education\) Window](#)
- [Biographical Sketch \(Education\) Window Description](#)
- [Biographical Sketch \(Experience\) Window](#)
- [Biographical Sketch \(Experience\) Window Description](#)

Definition

Biographical sketch is educational, research, and professional experience data about an individual.

Overview

Biographical sketch information must be set up to ensure proper functioning of Oracle Grants Proposal. This information is a biographical database for Grants Proposal users.

Most sponsors require that biographical information about the Proposal Manager and every key member of the proposed research project team be submitted with the proposal. Biographical sketch data includes information on education, work experience, honors received, memberships, and publications.

Users can exclude biographical data entered in this setup procedure from appearing in any proposal by deselecting the Show check box in the Biographical Sketch (Experience) window.

Prerequisites

- ❑ Before setting up biographical sketch information, the user must enter employee information in Oracle Human Resource Management Systems.

To enter employee information, see [Entering a New Person, Managing People Using Oracle HRMS](#).

Setting Up Biographical Sketch Information Procedure

To set up biographical sketch information on key project personnel, perform the following steps.

1. In Grants Proposal, navigate to the Biographical Sketch (Education) window as follows:

Setup - Biographical Sketch

2. Enter data in each field of the Biographical Sketch (Education) window as described in [Table 11-1](#), page 11-5.
3. Click **Experience**.
The Biographical Sketch (Experience) window appears.
4. To enter experience information, select the Experience category.
5. Select the Description field and enter experience information.
6. If users do not want the experience information to show for the person selected in the Person field for any proposal, deselect the Show check box.
7. To enter honors information, select the Honors category.
8. Select the Description field and enter honors information.
9. Repeat Step 6 relative to honors information.
10. To enter membership information, select the Memberships category.
11. Select the Description field and enter membership information.
12. Repeat Step 6 relative to membership information.
13. To enter publication information, select the Publications category.
14. Select the Description field and enter publication information.
15. Repeat Step 6 relative to publication information.
16. Save or save and continue as follows:
File - Save or Save and Proceed
17. Close the window.

Biographical Sketch (Education) Window

Figure 11-1 *Biographical Sketch (Education) window*

The screenshot shows a window titled "Biographical Sketch (Education)". At the top, there is a text field labeled "Person" containing the name "Frethold, Doctor Roger". Below this, a section titled "Education" contains a table with the following columns: School, Degree Type, Degree, Graduation Date, Field of Study, and Specialization. The table lists three educational records. At the bottom right of the window, there is a button labeled "Experience".

School	Degree Type	Degree	Graduation Date	Field of Study	Specialization
Eastwest Universi	Baccalaureate Degre	B.A.	05.MAY-1981	Organic Chemistry	Chain Reactions
Southwest Univer	Master's Degree	M.S.	15.JUN-1983	Organic Chemistry	Polymorphism
ACME University	Doctoral Degree	Ph.D.	30.NOV-1987	Biochemistry	Cell Chemistry

Biographical Sketch (Education) Window Description

Table 11–1 *Biographical Sketch (Education) Window Description*

Field Name	Type	Features	Description
Person	required	list of values	name of person for whom biographical data is prepared
Education Region			
School	optional		school name
Degree Type	required	list of values	level of degree earned; seeded options are Associate Degree, Baccalaureate (Honors) Degree, Baccalaureate Degree, Doctoral Degree, First Professional Degree, Graduate Certificate, Intermediate Graduate Degree, Master's Degree, Post-Doctoral Degree, Post-Professional Degree, Postsecondary Certificate or Diploma (1 to 4 years), Postsecondary Certificate or Diploma (less than one year)
Degree	required		specific degree earned from school attended
Graduation Date	required	list of values: pop-up calendar	graduation date
Field of Study	optional		general field of study
Specialization	optional		area of specialization
Descriptive Flexfield	optional		field for user customization
Experience		button	opens Biographical Sketch (Experience) window where users enter biographical information relative to experience, honors, memberships, and publications

Biographical Sketch (Experience) Window

Figure 11–2 *Biographical Sketch (Experience) window*

The screenshot shows a window titled "Biographical Sketch (Experience)". At the top, there is a "Person" field containing the text "Frethold, Doctor Roger". Below this is a section header "Research and Professional Experience". Underneath, there is a "Category" list with four items: "Experience", "Employment", "Honors", and "Membership". The "Experience" category is selected. Below the categories is a "Description" table with three rows of experience entries, each with a "Show" checkbox to its right.

Description	Show
1987-1989 Research Associate, School of Medicine, ACME University, Albany, New York.	<input checked="" type="checkbox"/>
1989-1994 Assistant Professor, Department of Biochemistry, Northcentral University, Miami, Florida.	<input checked="" type="checkbox"/>
1994-Present Associate Professor, Department of Biochemistry, Northcentral University, Miami, Florida.	<input checked="" type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

Biographical Sketch (Experience) Window Description

Table 11–2 *Biographical Sketch (Experience) Window Description*

Field Name	Type	Features	Description
Person	default, display only		name of person for whom biographical data is prepared
Research and Professional Experience Region			
Category	display only	scroll list	seeded category of research and professional experience; categories are Experience, Honors, Memberships, and Publications. Users select appropriate category and enter information pertaining to that category in the Description field.
Description	optional		text that describes selected category
Show	optional	check box	selected by default; if selected, corresponding data is retrievable in a proposal. If deselected, corresponding data does not appear in any proposal.

12

Keywords Setup

This chapter describes how to set up keywords so they appear in the list of values in the Keywords page for selection. The following sections are in this chapter:

- [Definition](#)
- [Overview](#)
- [Setting Up Keywords Methods](#)
- [IGW_SCIENCE_CODES Table](#)

Definition

Keywords are user-defined identifiers that users employ to identify research areas while preparing proposals.

Overview

Keywords setup is a one-time, optional setup procedure where users can upload a keywords set or keyword thesaurus, to the IGW_SCIENCE_CODES table. Uploading keywords to the IGW_SCIENCE_CODES table enables users to select keywords from the list of values in the Keywords page for use in preparing proposals.

Setting Up Keywords Methods

To upload keywords to the IGW_SCIENCE_CODES table, use either of the following suggested methods.

1. Use a SQL script containing INSERT statements.
2. Use the SQL Loader tool.

IGW_SCIENCE_CODES Table

IGW_SCIENCE_CODES stores keywords and descriptions used in preparing proposals.

Table 12–1 IGW_SCIENCE_CODES Table

Column Descriptions				
Name	Null	Types	Description	Suggested Input
SCIENCE_CODE	NOT NULL	VARCHAR2 (15)	Keywords used in preparing proposals.	code identifying the keyword
DESCRIPTION	NOT NULL	VARCHAR2 (250)	Description for the keywords	description of the keyword
LAST_UPDATE_DATE	NOT NULL	DATE	Standard Who Column	Current date
LAST_UPDATED_BY	NOT NULL	NUMBER (15)	Standard Who Column	Application user ID
CREATION_DATE	NOT NULL	DATE	Standard Who Column	Current date
CREATED_BY	NOT NULL	NUMBER (15)	Standard Who Column	Application user ID
LAST_UPDATE_LOGI N	NOT NULL	NUMBER (15)	Standard Who Column	0
RECORD_VERSION_ NUMBER	NOT NULL	NUMBER	Standard Who Column	1

Part II

Processes and Reports

Processes and Reports Procedures

This chapter describes how to run processes and generate reports. The following sections are in this chapter:

- [Definition](#)
- [Overview](#)
- [Prerequisites](#)
- [IGW: EDI Generic Outbound Procedure](#)
- [Printing Form PHS 398 \(Rev. 05/01\), all Pages](#)
- [Printing Form PHS 398 Modular \(Rev. 05/01\), all Pages](#)
- [Printing Form PHS 2590 \(Rev. 05/01\), all Pages](#)
- [Printing Form PHS 398 \(Rev. 05/01\), Individual Pages Procedure](#)
- [Printing Form PHS 398 Modular \(Rev. 05/01\), Individual Pages Procedure](#)
- [Printing Form PHS 2590 \(Rev. 05/01\), Form Page 1 Procedure](#)
- [Printing Form PHS 2590 \(Rev. 05/01\), Individual Pages Procedure](#)

Definition

A process is an activity or set of activities that run in the background to accomplish a specific goal.

Reports are sponsor-specific grant application pages that can be printed individually.

Overview

This chapter describes the following process:

- IGW: EDI Generic Outbound

Oracle Grants Proposal currently provides the user with the following sponsor-specific grant application forms:

- Form PHS 398 (Rev. 05/01), Grant Application, Department of Health and Human Services, Public Health Service
- Form PHS 398 (Rev. 05/01), Modular Research Grant Application, Department of Health and Human Services, Public Health Service
- Form PHS 2590 (Rev. 05/01), Grant Progress Report, Department of Health and Human Services, Public Health Service

The functionality described in this section is available in the self service version of Grants Proposal.

IGW: EDI Generic Outbound

The IGW: EDI Generic Outbound process creates an outbound EDI flatfile, which is used to electronically submit a proposal to a sponsor.

Form PHS 398 (Rev. 05/01), Department of Health and Human Services, Public Health Service Grant Application

Form PHS 398 (Rev. 05/01) is an application for a grant used by the Department of Health and Human Services, Public Health Service.

This application contains the following pages that are printable in Grants Proposal:

- organization information, Form Page 1
- description of the proposed research, performance sites, and key personnel, Form Page 2

- detailed budget for initial budget period, Form Page 4
- budget for entire proposed project period, Form Page 5
- biographical sketch information, Biographical Sketch Format Page
- resources, Resources Format Page
- checklist, Checklist Form Page
- personal data on principal investigator, Personal Data Form Page
- other support information, Other Support Format Page
- personnel report, Personnel Report Format Page
- targeted/planned enrollment, Targeted/Planned Enrollment Format Page
- inclusion enrollment report, Inclusion Enrollment Report Format Page

Form PHS 398 (Rev. 05/01), Department of Health and Human Services, Modular Research Grant Application

Form PHS 398 (Rev. 05/01) Modular Research Grant Application is an abbreviated application for a grant used by the Department of Health and Human Services, Public Health Service.

This application contains the following pages that are printable in Grants Proposal:

- organization information, Form Page 1
- description of the proposed research, performance sites, and key personnel, Form Page 2
- detailed budget for initial budget period, Form Page 4
- budget justification; total direct costs requested for entire project period, Modular Budget Format Page
- biographical sketch information, Biographical Sketch Format Page
- resources, Resources Format Page
- checklist, Checklist Form Page
- personal data on principal investigator, Personal Data Form Page
- other support information, Other Support Format Page
- personnel report, Personnel Report Format Page

- targeted/planned enrollment, Targeted/Planned Enrollment Format Page
- inclusion enrollment report, Inclusion Enrollment Report Format Page

Form PHS 2590 (Rev. 05/01), Department of Health and Human Services, Public Health Service Progress Report

Form PHS 2590 (Rev. 05/01) is a grant progress report used by the Department of Health and Human Services, Public Health Service.

This application contains the following pages that are printable in Grants Proposal:

- organization information, Form Page 1
- detailed budget for next budget period, Form Page 2
- budget justification, Form Page 3
- biographical sketch information, Biographical Sketch Format Page
- progress report summary, Form Page 5
- checklist, Form Page 6
- personnel report, Form Page 7
- targeted/planned enrollment, Targeted/Planned Enrollment Format Page
- inclusion enrollment report, Inclusion Enrollment Report Format Page

References

For information on defining resource lists, see [Defining Resource Lists](#), *Oracle Projects User's Guide*.

For information on setting up resource lists in Grants Accounting, see [Define Resource Lists](#). Oracle Grants Accounting Setup Overview, *Oracle Grants Accounting User's Guide*.

Prerequisites

- Before printing reports, users must enter all pertinent proposal and budget data.

To enter proposal data, see [Obsolete Window](#), page 12-31.

To enter budget data, see [Obsolete Window](#), page 11-17.

IGW: EDI Generic Outbound Procedure

Note: Before running the IGW: EDI Generic Outbound process, users must set up the proposal customer, or sponsor, as a trading partner. For information on setting up trading partners, see *Defining Trading Partner Data, Oracle e-Commerce Gateway User's Guide*.

To run the IGW: EDI Generic Outbound process, perform the following steps.

1. In Grants Proposal, navigate to the Submit Request window as follows:

Processes & Reports - Run

The Submit a New Request window appears.

2. To submit an individual request, select the Single Request radio button.
3. Click **OK**.

The Submit Request window appears.

4. In the Name field, select IGW: EDI Generic Outbound from the list of values.
5. Click **OK**.

The Parameters window appears.

6. In the Proposal Number field, select a proposal number from the list of values.
7. In the Output File Path field, enter the path where the EDI flatfile will be created.

Note: The default value is picked up from the profile.

8. In the Narrative Type field, select a narrative type from the list of values.
9. In the Narrative Submission Type field, select a narrative submission type from the list of values.
10. In the Debug Mode field, select a debug mode from the list of values.

Note: Do not change the default of 0 with an associated description of OFF.

11. Click **OK** to apply the parameters.
12. To send the process request to the concurrent manager, click **Submit**.

The Requests window automatically appears for viewing.

13. Close the window.

Printing Form PHS 398 (Rev. 05/01), all Pages

To print all pages of form PHS 398 (Rev. 05/01), perform the following steps.

1. In Grants Proposal, navigate to the Submit Request Set window as follows:

Processes & Reports - Run

The Submit a New Request window appears.

2. To submit a request set, select the Request Set radio button.
3. Click **OK**.

The Submit Request Set window appears.

4. In the Request Set field, select IGW: PHS 398 (Rev. 05/01) Pages from the list of values.
5. Click **OK**.

6. Place the cursor in the Parameters field of the first record.

The Parameters window automatically appears.

7. In the Proposal Number field, select a proposal number from the list of values.
8. Click **OK** to apply the parameter.

Note: It is sufficient to apply the parameter to the first record only because the parameter is shared by the other reports in the request set.

9. In the Submit Request Set window, click **Options...**

The Upon Completion... window appears.

10. In the Printer field, select the appropriate printer from the list of values.
11. In the Copies field, enter the number of copies the user wants to print and click **OK**.
12. Repeat Steps 9, 10, and 11 for each report page.

Note: For advanced functionality, such as scheduling, see *Oracle Applications User's Guide*.

13. To send the print request to the concurrent manager, click **Submit**.

The Requests window automatically appears for viewing.

14. Close the window.

Printing Form PHS 398 Modular (Rev. 05/01), all Pages

To print all pages of form PHS 398 Modular (Rev. 05/01), perform the following steps.

1. In Grants Proposal, navigate to the Submit Request Set window as follows:

Processes & Reports - Run

The Submit a New Request window appears.

2. To submit a request set, select the Request Set radio button.
3. Click **OK**.

The Submit Request Set window appears.

4. In the Request Set field, select IGW: PHS 398 Modular (Rev. 05/01) Pages from the list of values.
5. Click **OK**.

6. Place the cursor in the Parameters field of the first record.

The Parameters window automatically appears.

7. In the Proposal Number field, select a proposal number from the list of values.

8. Click **OK** to apply the parameter.

Note: It is sufficient to apply the parameter to the first record only because the parameter is shared by the other reports in the request set.

9. In the Submit Request Set window, click **Options...**

The Upon Completion... window appears.

10. In the Printer field, select the appropriate printer from the list of values.

11. In the Copies field, enter the number of copies the user wants to print and click **OK**.

12. Repeat Steps 9, 10, and 11 for each report page.

Note: For advanced functionality, such as scheduling, see *Oracle Applications User's Guide*.

13. To send the print request to the concurrent manager, click **Submit**.

The Requests window automatically appears for viewing.

14. Close the window.

Printing Form PHS 2590 (Rev. 05/01), all Pages

To print all pages of form PHS 2590 (Rev. 05/01), perform the following steps.

1. In Grants Proposal, navigate to the Submit Request Set window as follows:

Processes & Reports - Run

The Submit a New Request window appears.

2. To submit a request set, select the Request Set radio button.
3. Click **OK**.

The Submit Request Set window appears.

4. In the Request Set field, select IGW: PHS 2590 (Rev. 05/01) Pages from the list of values.
5. Click **OK**.
6. Place the cursor in the Parameters field of the first record.

The Parameters window automatically appears.

7. In the Proposal Number field, select a proposal number from the list of values.
8. In the Review Group field, enter the review group assigned by the National Institute of Health.
9. In the Type field, enter the one digit number that represents the type of application.
10. In the Activity field, enter the type of activity for this grant application.
11. Click **OK** to apply the parameters.

Note: It is sufficient to apply the parameters to the first record only because the proposal number parameter is shared by the other reports in the request set and the other parameters are applicable to the first report only.

12. In the Submit Request Set window, click **Options...**

The Upon Completion... window appears.

13. In the Printer field, select the appropriate printer from the list of values.
14. In the Copies field, enter the number of copies the user wants to print and click **OK**.
15. Repeat Steps 12, 13, and 14 for each report page.

Note: For advanced functionality, such as scheduling, see *Oracle Applications User's Guide*.

16. To send the print request to the concurrent manager, click **Submit**.

The Requests window automatically appears for viewing.

17. Close the window.

Printing Form PHS 398 (Rev. 05/01), Individual Pages Procedure

To print form PHS 398 (Rev/ 05/01) pages individually, perform the following steps.

1. In Grants Proposal, navigate to the Submit Request window as follows:

Processes & Reports - Run

The Submit a New Request window appears.

2. To submit an individual request, select the Single Request radio button.
3. Click **OK**.

The Submit Request window appears.

4. In the Name field, select one of the following from the list of values: IGW: PHS 398 Form Page 1, 2, 4, 5, Biographical Sketch Format Page, Resources Format Page, Checklist Form Page, Personal Data Form Page, Other Support Format Page, Personnel Report Format Page, Targeted/Planned Enrollment Format, or Inclusion Enrollment Report Format Page.

The Parameters window appears.

5. In the Proposal Number field, select a proposal number from the list of values.
6. Click **OK** to apply the parameters.
7. In the Submit Request window, click **Options...**

The Upon Completion... window appears.

8. In the Printer field, select the appropriate printer from the list of values.
9. In the Copies field, enter the number of copies the user wants to print and click **OK**.
10. To send the print request to the concurrent manager, click **Submit**.

The printer prints the requested copies of the report and the Requests window automatically appears for viewing.

11. Close the window.

Printing Form PHS 398 Modular (Rev. 05/01), Individual Pages Procedure

To print form PHS 398 Modular (Rev. 05/01) pages individually, perform the following steps.

1. In Grants Proposal, navigate to the Submit Request window as follows:

Processes & Reports - Run

The Submit a New Request window appears.

2. To submit an individual request, select the Single Request radio button.
3. Click **OK**.

The Submit Request window appears.

4. In the Name field, select one of the following from the list of values: IGW: PHS 398 Form Page 1, 2, 4, Modular Budget Format Page, Biographical Sketch Format Page, Resources Format Page, Checklist Form Page, Personal Data Form Page, Other Support Format Page, Personnel Report Format Page, Targeted/Planned Enrollment Format Page, or Inclusion Enrollment Report Format Page.

The Parameters window appears.

5. In the Proposal Number field, select a proposal number from the list of values.
6. Click **OK** to apply the parameters.
7. In the Submit Request window, click **Options...**

The Upon Completion... window appears.

8. In the Printer field, select the appropriate printer from the list of values.
9. In the Copies field, enter the number of copies the user wants to print and click **OK**.
10. To send the print request to the concurrent manager, click **Submit**.

The printer prints the requested copies of the report and the Requests window automatically appears for viewing.

11. Close the window.

Printing Form PHS 2590 (Rev. 05/01), Form Page 1 Procedure

To print form PHS 2590 (Rev. 05/01), Form Page 1, perform the following steps.

1. In Grants Proposal, navigate to the Submit Request window as follows:

Processes & Reports - Run

The Submit a New Request window appears.

2. To submit an individual request, select the Single Request radio button.
3. Click **OK**.

The Submit Request window appears.

4. In the Name field, select IGW: PHS 2590 Form Page 1 from the list of values.

The Parameters window appears.

5. In the Proposal Number field, select a proposal number from the list of values.
6. In the Review Group field, enter the review group assigned by the National Institute of Health.
7. In the Type field, enter the one digit number that represents the type of application.
8. In the Activity field, enter the type of activity for this grant application.
9. Click **OK** to apply the parameters.
10. In the Submit Request window, click **Options...**

The Upon Completion... window appears.

11. In the Printer field, select the appropriate printer from the list of values.
12. In the Copies field, enter the number of copies the user wants to print and click **OK**.
13. To send the print request to the concurrent manager, click **Submit**.

The printer prints the requested copies of the report and the Requests window automatically appears for viewing.

14. Close the window.

Printing Form PHS 2590 (Rev. 05/01), Individual Pages Procedure

To print form PHS 2590 (Rev. 05/01), individual pages, perform the following steps.

1. In Grants Proposal, navigate to the Submit Request window as follows:

Processes & Reports - Run

The Submit a New Request window appears.

2. To submit an individual request, select the Single Request radio button.
3. Click **OK**.

The Submit Request window appears.

4. In the Name field, select one of the following from the list of values: IGW: PHS 2590 (Rev. 05/01) Form Page 2, 3, Biographical Sketch Format Page, Form Page 5, 6, 7, Targeted/Planned Enrollment Format Page or Inclusion Enrollment Report Format Page.

The Parameters window appears.

5. In the Proposal Number field, select a proposal number from the list of values.
6. Click **OK** to apply the parameters.
7. In the Submit Request window, click **Options...**

The Upon Completion... window appears.

8. In the Printer field, select the appropriate printer from the list of values.
9. In the Copies field, enter the number of copies the user wants to print and click **OK**.
10. To send the print request to the concurrent manager, click **Submit**.

The printer prints the requested copies of the report and the Requests window automatically appears for viewing.

11. Close the window.

Part III

Topical Essays

Grants Proposal Approval and Routing Process

This appendix describes the Oracle Grants Proposal approval and routing process. The following sections are in this appendix:

- [Definition](#)
- [Overview](#)
- [Prerequisites](#)
- [Proposal Approval Process](#)
- [Proposal Approval Process Flowchart](#)

Definition

Approval and routing is a process that routes the proposal electronically to a list of organizational authorities and seeks their approval. This process is accomplished through a series of business rule evaluations where each business rule for the applicant unit identified in the proposal is evaluated against the proposal content.

The following types of business rules are defined by users for an organization:

- validation
- routing
- notification

An approval hierarchy is a ranking of approval organizations, starting with the organization preparing the proposal and ending with the top-most organization.

Overview

Before a proposal is submitted to a sponsor, it must be internally reviewed and approved. This process is initiated only by the Proposal Manager or the Proposal Owner from the Proposals window by selecting Submit for Approval from the Tools Menu.

Once the proposal is submitted for approval, the proposal status changes from In-Progress to Approval In-Progress. If the proposal is rejected during the approval process, it can be modified and resubmitted for approval. The process completes when the final approver approves the proposal and the proposal status changes from Approval-In-Progress to Approved.

When the proposal is submitted for approval, the approvers are automatically assigned the Proposal Approver role. Notified persons are assigned the Proposal Viewer role.

The Proposal Approver and the Proposal Viewer roles enable users to view the proposal. The Proposal Signing Official must have the proposal superuser role to be able to modify the proposal content, regardless of proposal status.

Users can modify a proposal based upon the following factors:

- proposal status
- proposal user role

For information on proposal modification, see [Proposal Security Process](#), page B-1.

References

For information on setting up business rules, see [Business Rules Setup](#), page 9-1.

For information on setting up maps, see [Maps Setup](#), page 8-1.

Prerequisites

- ❑ Before users can submit a proposal for approval, the following values must be selected in the Implementation Options window:
 - organization approval hierarchy name
 - version number
 - start organization

To enter implementation options, see [Implementation Options Setup](#), page 4-1.

- ❑ Before users can submit a proposal for approval, maps must be set up for the organizations in the approval hierarchy.

To set up maps, see [Maps Setup](#), page 8-1.

- ❑ Before users can submit a proposal for approval, business rules must be set up.

To set up business rules, see [Business Rules Setup](#), page 9-1.

- ❑ Before users can submit a proposal for approval, the submitter must be the Proposal Owner or Proposal Manager.

To set up proposal roles and assign rights to the roles, see [Proposal Roles Setup](#), page 5-1.

To specify a person as a Proposal Manager, see Grants Proposal Self Service.

To assign roles to users, see Grants Proposal Self Service.

- ❑ Before users can submit a proposal for approval, the budget status in the Budget Versions window must be Complete or None.

For information on budget status, see Grants Proposal Self Service.

For information on narrative module status, see Grants Proposal Self Service.

Proposal Approval Process

Table A-1 describes the proposal approval process.

Table A-1 Proposal Approval Process

Event	Description
1.	Grants Proposal selects validation business rules for the applicant unit and evaluates their expressions.
2.	If Grants Proposal evaluates a validation business rule expression as Invalid at any level in the approval hierarchy, the approval process is aborted.
3.	If Grants Proposal evaluates a validation business rule expression as Valid, the system selects for evaluation the validation business rule of the parent organization in the approval hierarchy. Events 1, 2, and 3 repeat until the top-most organization in the approval hierarchy is reached.
4.	When all validation business rule expressions for the applicant unit are evaluated as True in the approval hierarchy, the system selects notification business rules for the applicant unit and evaluates their expressions.
5.	If Grants Proposal evaluates a notification business rule expression as False, a map corresponding to the notification business rule is not selected for notification.
6.	If Grants Proposal evaluates a notification business rule expression as True, the map corresponding to the notification business rule is selected for notification.
7.	Grants Proposal selects for evaluation the notification business rules of the parent organization in the approval hierarchy and evaluates their expressions. Events 5, 6, and 7 repeat until the top-most organization in the approval hierarchy is reached.
8.	After all the notification business rules for the organizations in the hierarchy are evaluated, Grants Proposal selects routing business rules for the applicant unit and evaluates their expressions.
9.	If Grants Proposal evaluates a routing business rule expression as False, the map corresponding to the routing business rule is not selected for routing.
10.	If Grants Proposal evaluates a routing business rule expression as True, the map corresponding to the routing business rule is selected for routing.
11.	If more than one routing business rule evaluates as True, their corresponding maps are executed in user-defined sequence.
12.	Grants Proposal selects for evaluation the routing business rules of the parent organization in the approval hierarchy and evaluates their expressions. Events 9, 10, 11, and 12 repeat until the top-most organization in the approval hierarchy is reached.

Table A-1 Proposal Approval Process

Event	Description
13.	Notification is sent to all persons in the selected maps for the notification business rule. Notification for approval is sent to the first stop in the first selected map for the routing business rule.

The stages of the proposal approval process are described in greater detail in the following sections.

Evaluating Validation Business Rules

A validation business rule validates or invalidates certain conditions of the proposal. It does not seek approval. An example of a validation business rule is the following: If the underrecovery amount \geq \$10,000, then the proposal is invalid.

The proposal approval process first selects validation business rules for the applicant unit and evaluates their expressions.

If any of the validation business rule expressions evaluate as Invalid, an error message appears that indicates the name of the business rule and the name of the organization owning the rule. If a validation business rule is Invalid at any level in the approval hierarchy, the error message appears and the approval process is aborted.

If an expression evaluates as Valid, the system then selects for evaluation the validation business rules of the parent organization in the approval hierarchy.

This selection and evaluation process continues until the system has evaluated the validation business rules from the applicant unit to the top-most organization in the approval hierarchy.

Evaluating Notification Business Rules

A notification business rule notifies personnel of an activity, but it does not require approval. Everyone in the applicable map is notified that the proposal has been submitted for approval. An example of a notification business rule is the following:

If the sponsor type is a Foundation in a proposal, then notify the Dean when the proposal is submitted.

Organizations can have more than one notification business rule.

When all validation business rules from the applicant unit to the top-most organization in the approval hierarchy are evaluated as True, the system evaluates notification business rules.

If a notification business rule expression evaluates as False at any level in the approval hierarchy, the map corresponding to the notification business rule is not selected for notification.

If a notification business rule expression evaluates as True, the map corresponding to the notification business rule is selected for notification. Notification is sent to all persons in the selected maps for the notification business rule.

This selection and evaluation process continues until the system has evaluated the notification business rules from the applicant unit to the top-most organization in the approval hierarchy.

Evaluating Routing Business Rules

A routing business rule specifies the sequence of proposal stops for review and approval. Users can assign a sequence to all routing business rules for a given organization. Each routing business rule is associated with a specific approval map. A proposal is routed for approval based upon the user-defined sequence.

When all notification business rules for the applicant unit are evaluated in the approval hierarchy, the system evaluates the routing business rules.

If all routing business rule expressions are evaluated as False, an error message appears, indicating that no routing stop was found and the approval process is aborted.

If an expression in a routing business rule evaluates as True, the map corresponding to the routing business rule is selected for routing.

If two or more routing business rules for an organization evaluate as True, their corresponding maps are executed in the order defined by the Sequence field in the Rule Name, Sequence tab of the Create Business Rules window. The system then selects for evaluation the routing business rules of the parent organization in the approval hierarchy and evaluates their expressions.

This selection and evaluation process continues until the system has evaluated the routing business rules of the top-most organization in the approval hierarchy.

Evaluating Expressions

When a proposal is submitted for approval, the approval process dynamically substitutes actual values in place of the variables in the business rules' expressions and then evaluates the expressions. Based on the evaluation of the expressions, the corresponding maps are selected for routing or notification.

For example, suppose a business rule expression is the following:

If Total Cost > 1,000,000, select map Special Approval

Suppose the proposal the user is submitting has a Total Cost of \$2,000,000. When the proposal is submitted for approval, the system substitutes the Total Cost variable with 2,000,000 and the expression becomes the following:

If 2,000,000 > 1,000,000, select map Special Approval

This expression is evaluated as True and routing map Special Approval is selected.

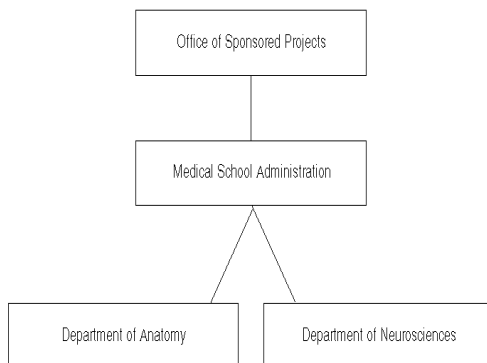
Proposal Approval Process Example

To illustrate the proposal approval process, suppose that users create a three-level organization approval hierarchy for a medical school as follows:

- Office of Sponsored Projects is the highest approving organization
- Medical School Administration is the child organization of the Office of Sponsored Projects
- Department of Anatomy is the child organization of Medical School Administration
- Department of Neurosciences is also the child organization of Medical School Administration

[Figure A-1](#), page A-9 illustrates the organization approval hierarchy as described in the accompanying text.

Figure A-1 Three-Level Sample Organization Approval Hierarchy



Users in this example create the business rules and maps shown in [Table A-2](#).

Table A-2 Business Rules and Maps Created by Users

Organization	Business Rule	Expression	Map	Person
Office of Sponsored Projects	Underrecovery Validation Business Rule	If underrecovery amount > 0, then invalid	Not Applicable	Not Applicable
Office of Sponsored Projects	OSP Routing Business Rule	The expression line remains blank. If the expression line is blank, the applicable rule is always invoked.	OSP Approval Map	Primary Approver is John Smith. Secondary Approver is Nancy Miller.
Office of Sponsored Projects	Human Subjects Office Notification Business Rule	If special review type = human subjects	Human Subjects Office Notification Map	Persons to be Notified are Mark Doe and Nicole Callimeri.
Medical School Administration	Medical School Routing Business Rule	The expression line remains blank. If the expression line is blank, the applicable rule is always invoked.	Medical School Approval Map	Primary Approver is Linda Johnson. Secondary Approver is George Hamilton.

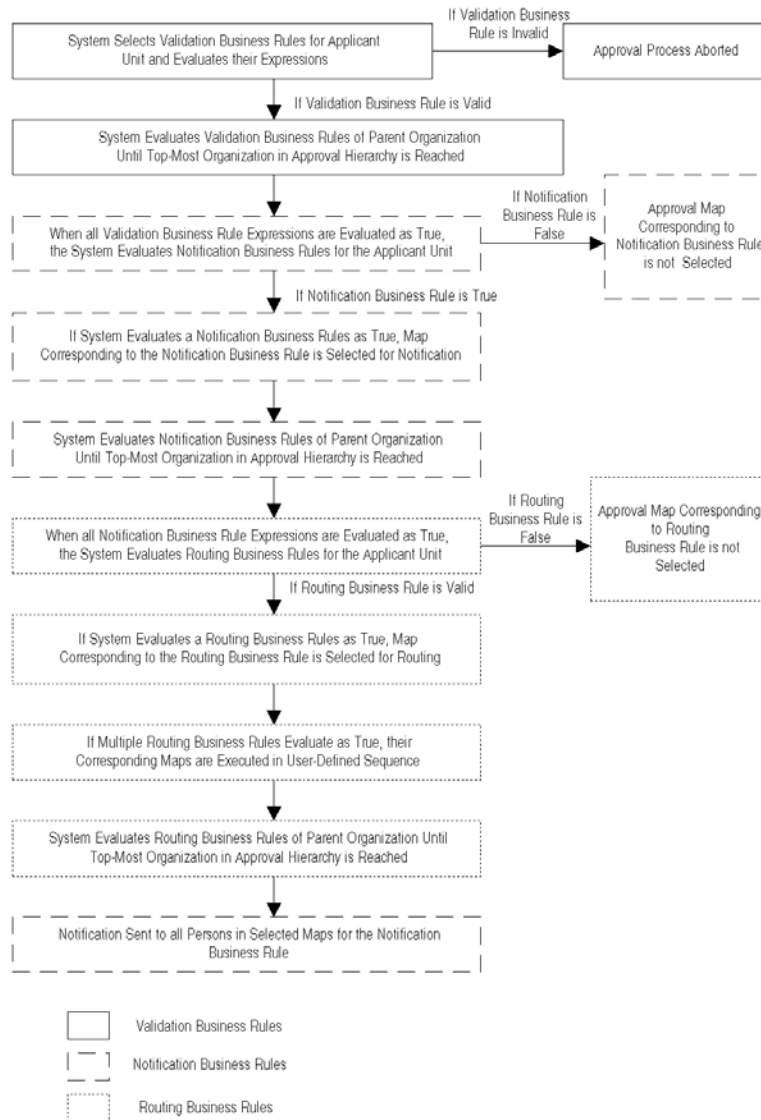
Suppose that the Department of Anatomy is the applicant unit that prepares a proposal that has an underrecovery amount of \$50,000. The validation business rule is invoked first. Since the Department of Anatomy has no validation business rule, the system skips it and evaluates the Medical School Administration. Since the Medical School Administration has no validation business rule, the system skips it and evaluates the Office of Sponsored Projects. Because the underrecovery amount is greater than zero, the validation business rule evaluates as Invalid and the proposal is not submitted for approval.

To make the underrecovery amount zero, the proposal must be modified. After modifying the proposal budget so the underrecovery amount is zero, the proposal is resubmitted. When the validation business rule is invoked this time, the proposal evaluates as Valid. Notifications are first sent to Mark Doe and Nicole Callimeri. The proposal is then routed for approval to Linda Johnson, Primary Approver; and George Hamilton, Secondary Approver, in Medical School Administration. After either one of them approves the proposal, it is routed to John Smith, Primary Approver; and Nancy Miller, Secondary Approver, in the Office of Sponsored Projects. When one of them approves the proposal, the proposal status changes from Approval in-Progress to Approved since there is no one above them in the approval hierarchy.

Proposal Approval Process Flowchart

Figure A-2 shows the proposal approval process flowchart as described in Table A-1.

Figure A-2 Proposal Approval Process Flowchart



Proposal Security Process

This appendix describes how the proposal security process works in Oracle Grants Proposal. The following sections are in this appendix:

- [Definition](#)
- [Overview](#)
- [Grants Proposal Security Process](#)
- [Grants Proposal Security Process Flowchart](#)

Definition

Proposal security enables the Proposal Owner or the Proposal Manager to specify users' access to each of the tabs in Grants Proposal.

Overview

The proposal security process starts with users setting up proposal roles. Proposal roles describe the function with which proposal personnel are associated. Additionally, Grants Proposal provides users with seeded roles. Users can also define additional roles as desired, such as Narrative Writer or Budget Creator. Roles are associated with one or more seeded rights. Seeded rights are tab-related tasks, such as Modify General Tab or Modify Budget Tab. The Proposal Owner or the Proposal Manager assigns roles to proposal personnel.

Proposal Superuser Profile Option

Grants Proposal provides users with a proposal superuser profile option, IGW: Proposal Superuser, which can be set at the site, application, responsibility, or user-level. The proposal superuser profile option is associated with maximum proposal rights, enabling users to see and modify any proposal, regardless of proposal status.

If IGW: Proposal Superuser is set at the site or application-level, all Grants Proposal users are superusers and the proposal superuser profile option overrides proposal security. Additionally, if users, for example, create a responsibility called Grants Proposal Administrator and set the proposal superuser profile option at the responsibility-level, all persons who have the Grants Proposal Administrator responsibility have superuser rights. If IGW: Proposal Superuser is set at the user-level, the Grants Proposal Administrator responsibility must be set for each person desiring maximum rights.

Seeded Roles and Seeded Rights

Table B-1 shows the seeded roles and their associated rights.

Table B-1 Seeded Roles with Associated Rights

Seeded Roles	Description	Seeded Rights
Proposal Owner	Proposal Creator	Modify General Tab, Modify Budget Tab, Modify Narrative Tab, Modify Checklist Tab, Submit Proposal for Approval, Modify Sponsor Action Tab, Modify Award Tab, Print Proposal
Proposal Manager	Proposal Manager	Modify General Tab, Modify Budget Tab, Modify Narrative Tab, Modify Checklist Tab, Submit Proposal for Approval, Modify Sponsor Action Tab, Modify Award Tab, Print Proposal
Proposal Approver	Proposal Approver	View Proposal, Print Proposal
Proposal Viewer	Proposal Viewer	View Proposal, Print Proposal

[Table B-2](#) shows the seeded rights and their associated seeded descriptions.

Table B-2 Seeded Rights with Associated Seeded Descriptions

Seeded Rights	Seeded Descriptions
Modify General Tab	Modify and View General Tab Contents
Modify Budget Tab	Modify and View Budget Tab Contents
Modify Narrative Tab	Modify and View Narrative Tab Contents
Modify Checklist Tab	Modify and View Checklist Tab Contents
Submit Proposal for Approval	Submit Proposal for Approval
Modify Sponsor Action Tab	Modify and View Sponsor Action Tab Contents
Modify Award Tab	Modify and View Award Tab Contents
View Proposal	View Proposal
Print Proposal	Print Proposal

Any users who have access to the Grants Proposal responsibility can create a new proposal. The person who creates the proposal is automatically assigned the role of Proposal Owner. The role of Proposal Owner cannot be assigned to another person. Every proposal must also have the role of Proposal Manager assigned to it. The role of Proposal Manager can be assigned to another person. The Proposal Owner and the Proposal Manager can be the same person or they can be different people. Both the Proposal Owner and the Proposal Manager have full access to all proposal tabs and they have the same rights.

The Proposal Approver role gives users read-only access to proposals, budgets, and narratives. This role is system-assigned automatically to proposal approvers listed in the Approval Status window when the proposal is submitted for approval.

Proposal Modification

[Table B-3](#) shows tabs where data can be modified given proposal status and the assignment of modifiable tab rights to a particular role.

Table B-3 Proposal Modification Given Proposal Status and Assigned Modifiable Rights

Proposal Status	Modifiable Tabs if Modifiable Tab Rights are Assigned to a Role
In-Progress	General Tab, Budget Tab, Narrative Tab, Checklist Tab, Internal Approval Tab
Approval In-Progress	Narrative Tab, Checklist Tab
Approved	Sponsor Action Tab, Award Tab
Rejected	General Tab, Budget Tab, Narrative Tab, Checklist Tab, Internal Approval Tab

Proposal Security Example

[Table B-4](#) shows an example of personnel for a proposed research project with their associated responsibilities.

Table B-4 Proposal Personnel with Associated Responsibilities

Project Personnel	Title	Responsibilities
John O'Connor	Lead Research Scientist	Entire Proposal Preparation
Linda Smith	Research Scientist	Budget Preparation
Alex Miller	Research Assistant	Narrative Preparation

[Table B-5](#) shows an example of the roles defined by users and the system-defined rights assigned to those roles.

Table B-5 *User-Defined Roles with System-Assigned Rights*

User-Defined Roles	System-Assigned Rights
Proposal Owner; John O'Connor specifies himself as the Proposal Manager.	Modify General Tab, Modify Budget Tab, Modify Narrative Tab, Modify Checklist Tab, Submit Proposal for Approval, Modify Sponsor Action Tab, Modify Award Tab, Print Proposal
Budget Creator	Modify Budget Tab
Narrative Creator	Modify Narrative Tab

[Table B-6](#) shows an example of the roles assigned to the project personnel.

Table B-6 *Proposal Personnel with Assigned Roles*

Project Personnel	Assigned Roles
John O'Connor	Proposal Owner; John O'Connor also specifies himself as the Proposal Manager.
Linda Smith	Budget Creator
Alex Miller	Narrative Creator

References

For information on setting up proposal roles and assigning rights to the roles, see [Proposal Roles Setup](#), page 5-1.

Grants Proposal Security Process

Table B-7 describes the Grants Proposal security process.

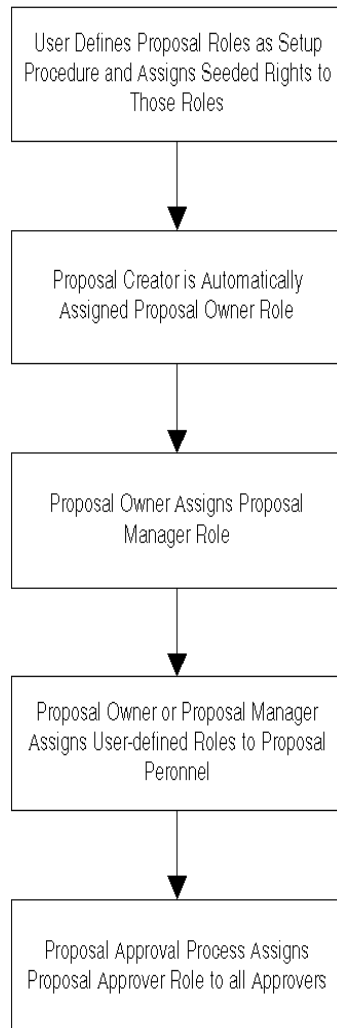
Table B-7 Grants Proposal Security Process

Event	Description	When or Where Event Occurs
1.	The users define proposal roles and assign one or more seeded rights to those roles as a setup procedure.	Create Roles window
2.	The person who creates the proposal is automatically assigned the Proposal Owner role and is automatically assigned all rights. Grants Proposal defines the Proposal Owner as the login user.	when proposal is saved
3.	The Proposal Owner specifies the Proposal Manager who has the same rights as the Proposal Owner. If the Proposal Manager is changed, the new Proposal Manager is assigned the Proposal Manager's rights.	when proposal is saved
4.	The Proposal Owner or Proposal Manager assigns roles to proposal personnel.	Proposal User Roles window
5.	The proposal approval process automatically assigns role of Proposal Approver to all users listed in the Internal Approval tab when proposal is submitted for approval.	when the proposal is submitted for approval
6.	Proposal Manager role can be assigned to another person by selecting the Proposal Manager check box	Personnel Details window

Grants Proposal Security Process Flowchart

Figure B-1 shows the Grants Proposal security process flowchart as described in Table B-7.

Figure B-1 Grants Proposal Security Process Flowchart



Oracle Grants Proposal Workflow Process

This appendix contains a detailed discussion of the Oracle Grants Proposal Workflow process. The following sections are in this appendix:

- [Overview](#)
- [IGW Proposal Approval Item Type](#)
- [Proposal Approval Process Workflow Diagram](#)
- [Proposal Approval Workflow Process](#)
- [Notify Approver Subprocess Workflow Diagram](#)
- [Notify Approver Subprocess Workflow Process](#)
- [Notify Proposal Members Workflow Diagram](#)
- [Notify Proposal Members Workflow Process](#)
- [Customizing Grants Proposal Workflow](#)

Overview

Grants Proposal uses Oracle Workflow to manage the proposal approval and notification processes.

Workflow features include the following:

- Oracle Workflow Builder, a graphical tool that allows users to create business process definitions
- Workflow Engine, which implements process definitions at runtime
- Notification System, which sends notifications and processes responses in a workflow

Note: When users receive notification, they can access the proposal by clicking the iconic button that is provided along with the notification.

Grants Proposal provides the following Workflow functionality:

- Proposal Approval Process
- Notify Approval Subprocess
- Notify Proposal Members Process

Use Oracle Workflow Builder to customize workflows or to create new workflows. For information on Workflow, see the *Oracle Workflow Guide*.

The functionality described in this section is available in the self-service version of Grants Proposal.

Proposal Approval Process

The Proposal Approval Process is initiated when a proposal is submitted for approval. Users submit a proposal for approval by selecting Submit for Approval from the Tools Menu.

Notifications are sent to approvers and the workflow process waits for the response from each approver before proceeding to the next approver in the hierarchical proposal approval map.

The proposal is approved if all approvers approve the proposal. The proposal is rejected if any approvers reject it.

The person submitting the proposal for approval is notified of the approval status at every stage during the approval process.

Notify Approval Subprocess

The Notify Approval Subprocess is initiated during the Proposal Approval Process when the next approver in the hierarchical approval map is selected.

The Notify Approval Subprocess notifies the approver that a proposal is pending for approval. The approver can approve or reject the proposal.

If the approver fails to approve or reject the proposal within a given time frame, the approver receives periodic reminders. Organizations can set the timeout, which defines the time frame in which the reminders are sent. By default, the timeout is not set.

Notify Proposal Members Process

The Notify Proposal Members Process sends notifications to the list of persons in the Send Notifications window.

IGW Proposal Approval Item Type

The Grants Proposal Workflow processes are grouped together within the IGW Proposal Approval item type. The IGW Proposal Approval item type is associated with several Workflow attributes that reference information in the Grants Proposal application tables. These attributes are used and maintained by function activities as well as notification activities throughout the processes.

[Table C-1](#) describes the attributes associated with the IGW Proposal Approval item type.

Table C-1 Attributes Associated with the IGW Proposal Approval Item Type

Display Name	Description	Type	Length, Format, or Lookup Type
Forward From Display Name	name of the person that the proposal is forwarded from	text	240
Forward From Username	username of person that the proposal is forwarded from	text	30
Forward To Display Name	name of person that the proposal is forwarded to	text	240
Forward To Username	username of person that the proposal is forwarded to	text	30
Proposal Number	unique identifier of the proposal	text	30
Creator Display Name	name of person submitting the proposal for approval	text	240
Creator Username	username of person submitting the proposal for approval	text	30
Notification Role Name	Workflow ad hoc role display name	text	30
Proposal Title	proposal title	text	250
Sponsor	funding source	text	50
Deadline Date	last date for proposal submission to sponsor	date	10

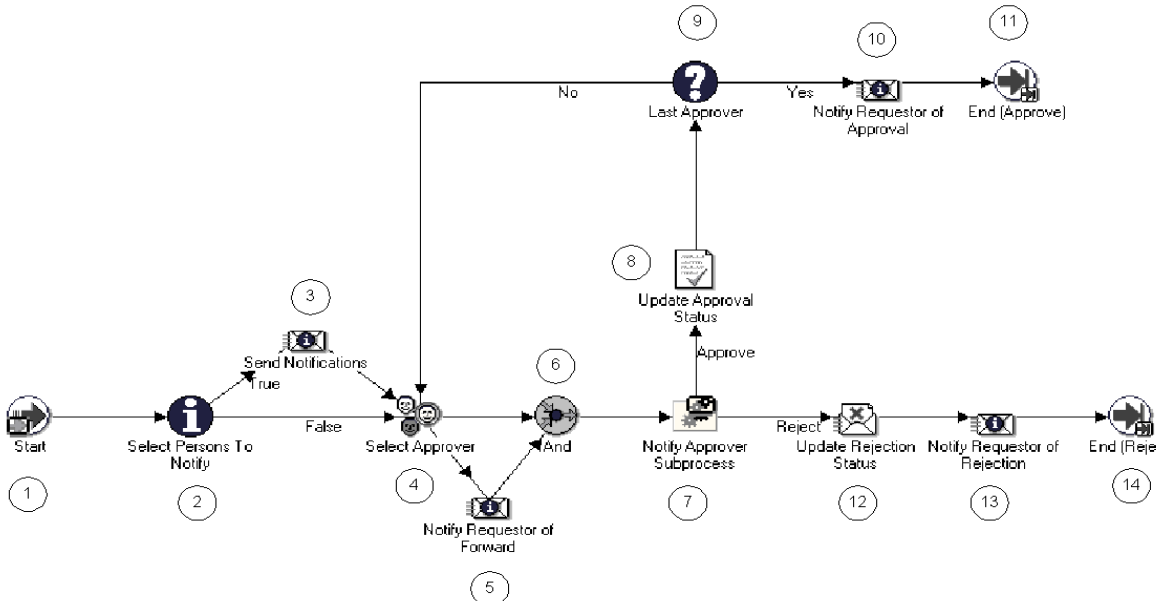
Table C-1 Attributes Associated with the IGW Proposal Approval Item Type

Display Name	Description	Type	Length, Format, or Lookup Type
Proposal Id	proposal identifier	number	15
Prop Map Id	identifier for each map in a proposal approval run	number	15
Run Id	run identifier	number	15
Lead Organization Name	lead organization through which the proposal is developed and administered	text	60
Note	message that approver sends when proposal is approved or rejected	text	2000
Notification Note	message sent to persons listed in the Send Notifications window	text	2000
Proposal Manager	proposal manager	text	240
Proposal Owner	proposal owner	text	240
Proposal Type	proposal type	text	80

Proposal Approval Process Workflow Diagram

Figure C-1 shows the proposal approval process nodes as described in the accompanying text.

Figure C-1 Proposal Approval Process Workflow Diagram



Proposal Approval Workflow Process

This section describes the Proposal Approval Workflow Process.

Start (Node 1)

[Table C-2](#) describes a standard function activity, which marks the start of the Workflow process.

Table C-2 *Start (Node 1)*

Function	Result Type	Prerequisite Activities
WF_STANDARD.NOOP	None	None

Select Persons to Notify (Node 2)

[Table C-3](#) describes a function activity, which selects the persons to be notified of the proposal being submitted for approval.

Table C-3 *Select Persons to Notify (Node 2)*

Function	Result Type	Prerequisite Activities
IGW_WORKFLOW.SELECT_PERSONS_TO_NOTIFY	Boolean	Start

Send Notifications (Node 3)

[Table C-4](#) describes an activity, which notifies the selected persons that the proposal has been submitted for approval.

Table C-4 *Send Notifications (Node 3)*

Message	Result Type	Prerequisite Activities
Send Notifications	None	Select Persons to Notify

Select Approver (Node 4)

[Table C-5](#) describes a function activity, which selects the next approver in the hierarchical approval map.

Table C-5 Select Approver (Node 4)

Function	Result Type	Prerequisite Activities
IGW_WORKFLOW.SELECT_APPROVER	None	Send Notifications

Notify Requestor of Forward (Node 5)

[Table C-6](#) describes an activity, which notifies the person submitting the proposal for approval that the proposal has been forwarded to the next approver in the approval map.

Table C-6 Notify Requestor of Forward (Node 5)

Message	Result Type	Prerequisite Activities
Proposal Forward	None	Select Approver

And (Node 6)

[Table C-7](#) describes a standard function activity, which performs a parallel And join. The node waits for all incoming transitions to arrive before it completes activity.

Table C-7 And (Node 6)

Function	Result Type	Prerequisite Activities
WF_STANDARD.ANDJOIN	None	Select Approver, Notify Requestor of Forward

Notify Approver Subprocess (Node 7)

[Table C-8](#) describes a Subprocess, which notifies the approver that a proposal has been received for approval.

Table C-8 *Notify Approver Subprocess (Node 7)*

Process	Result Type	Prerequisite Activities
NOTIFY_APPROVER_SUBPROCESS	Approval	And

Update Approval Status (Node 8)

[Table C-9](#) describes a function activity, which marks the action of the approver as approved.

Table C-9 *Update Approval Status (Node 8)*

Function	Result Type	Prerequisite Activities
IGW_WORKFLOW.UPDATE_APPROVAL_STATUS	None	Notify Approver

Last Approver (Node 9)

[Table C-10](#) describes a function activity, which determines whether or not there are any other approvers in the approval map.

Table C-10 *Last Approver (Node 9)*

Function	Result Type	Prerequisite Activities
IGW_WORKFLOW.LAST_APPROVER	Yes/No	Update Approval Status

Notify Requestor of Approval (Node 10)

[Table C–11](#) describes an activity, which notifies the person submitting the proposal for approval that the proposal has been approved.

Table C–11 *Notify Requestor of Approval (Node 10)*

Message	Result Type	Prerequisite Activities
Proposal Approved	None	Last Approver

End (Approve) (Node 11)

[Table C–12](#) describes a standard function activity, which marks the end of the process. The Workflow process ends with the proposal being approved.

Table C–12 *End (Approve) (Node 11)*

Function	Result Type	Prerequisite Activities
WF_STANDARD.NOOP	None	Notify Requestor of Approval

Update Rejection Status (Node 12)

[Table C–13](#) describes a function activity, which marks the action of the approver as rejected.

Table C–13 *Update Rejection Status (Node 12)*

Function	Result Type	Prerequisite Activities
IGW_WORKFLOW.UPDATE_REJECTION_STATUS	None	Notify Approver

Notify Requestor of Rejection (Node 13)

[Table C-14](#) describes an activity, which notifies the person submitting the proposal for approval that the proposal has been rejected.

Table C-14 *Notify Requestor of Rejection (Node 13)*

Message	Result Type	Prerequisite Activities
Proposal Rejected	None	Update Rejection Status

End (Reject) (Node 14)

[Table C-15](#) describes a standard function activity, which marks the end of the process. The Workflow process ends with the proposal being rejected.

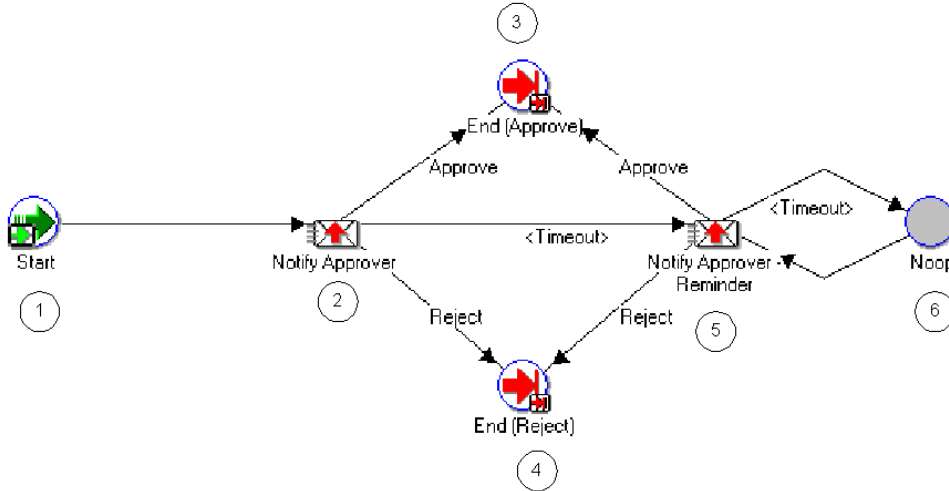
Table C-15 *End (Reject) (Node 14)*

Function	Result Type	Prerequisite Activities
WF_STANDARD.NOOP	None	Notify Requestor of Rejection

Notify Approver Subprocess Workflow Diagram

Figure C-2 shows the notify approver subprocess nodes as described in the accompanying text.

Figure C-2 Notify Approver Subprocess Workflow Diagram



Notify Approver Subprocess Workflow Process

This section describes the Notify Approver Subprocess Workflow process.

Start (Node 1)

[Table C-16](#) describes a standard function activity that marks the start of the process.

Table C-16 Start (Node 1)

Function	Result Type	Prerequisite Activities
WF_STANDARD.NOOP	None	None

Notify Approver (Node 2)

[Table C-17](#) describes an activity, which notifies the approver that there is a proposal pending for approval.

Table C-17 Notify Approver (Node 2)

Message	Result Type	Prerequisite Activities
Notify Approver	Approval	Start

End (Approve) (Node 3)

[Table C-18](#) describes an activity, which marks the end of the process.

Table C-18 End (Approve) (Node 3)

Function	Result Type	Prerequisite Activities
WF_STANDARD.NOOP	None	Notify Approver

End (Reject) (Node 4)

[Table C-19](#) describes a function activity, which marks the end of the process.

Table C-19 End (Reject) (Node 4)

Function	Result Type	Prerequisite Activities
WF_STANDARD.NOOP	None	Notify Approver

Notify Approver Reminder (Node 5)

[Table C-20](#) describes an activity, which sends a reminder notification to the approver if the approver fails to deliver a decision within the specified time limit.

Table C-20 *Notify Approver Reminder (Node 5)*

Message	Result Type	Prerequisite Activities
Notify Approver	Approval	Notify Approver

Noop (Node 6)

[Table C-21](#) describes a function node that is simply a placeholder, which does not perform any operation.

Table C-21 *Noop (Node 6)*

Function	Result Type	Prerequisite Activities
WF_STANDARD.NOOP	None	Notify Approver Reminder

Notify Proposal Members Workflow Diagram

Figure C-3 shows the notify proposal members nodes as described in the accompanying text.

Figure C-3 Notify Proposal Members Workflow Diagram



Notify Proposal Members Workflow Process

This section describes the Notify Proposal Members Workflow process.

Start (Node 1)

[Table C-22](#) describes a standard function activity, which marks the start of the process.

Table C-22 *Start (Node 1)*

Function	Result Type	Prerequisite Activities
WF_STANDARD.NOOP	None	None

@Notify Proposal Members (Node 2)

[Table C-23](#) describes an activity, which sends a notification to persons listed in the Send Notifications window.

Table C-23 *@ Notify Proposal Members (Node 2)*

Message	Result Type	Prerequisite Activities
Notify Proposal Members	None	Start

End (Node 3)

[Table C-24](#) describes a function activity, which marks the end of the process.

Table C-24 *End (Node 3)*

Function	Result Type	Prerequisite Activities
WF_STANDARD.NOOP	None	@ Notify Proposal Members

Customizing Grants Proposal Workflow

The Grants Proposal Workflow processes can be customized as follows.

Required Modifications

No modifications are required to run Grants Proposal Workflow processes.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can set the timeout, which defines the time frame in which the reminders are sent. By default, the timeout is not set.
- Organizations can create new messages. Messages are used for notification activities in the workflow process.
- Organizations can create new notifications and notification activities and modify the workflow process to accommodate these new activities.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the Grants Proposal Workflow processes.

Part IV

References

Uploading Proposals from External Systems

This appendix describes the process of uploading proposal data from external systems to Oracle Grants Proposal. The following sections are in this appendix:

- [Definition](#)
- [Overview](#)
- [API Usage](#)
- [API Usage Flowchart](#)
- [Uploading Basic Proposal Data](#)
- [Uploading Proposed Work Sites](#)
- [Uploading Proposal Persons](#)
- [Uploading Paragraphs](#)
- [Uploading Special Reviews](#)
- [Uploading Budgets](#)
- [Uploading Budget Periods](#)

Definition

Application Program Interfaces (APIs), or program units, are provided by Grants Proposal to upload data from external systems into Grants Proposal tables.

Overview

This reference chapter assumes users have a familiarity with basic programming skills.

APIs for uploading proposal data from external systems are included in the Grants Proposal system. This set of APIs is comprised of procedures for uploading the following proposal components:

- basic proposal data
- proposed work sites
- proposal persons
- paragraphs
- special reviews
- budgets
- budget periods

Users must initialize the Oracle application environment by executing the `FND_GLOBAL.APPS_INITIALIZE` API before calling these program units for upload.

API Usage

Table D-1 describes API usage.

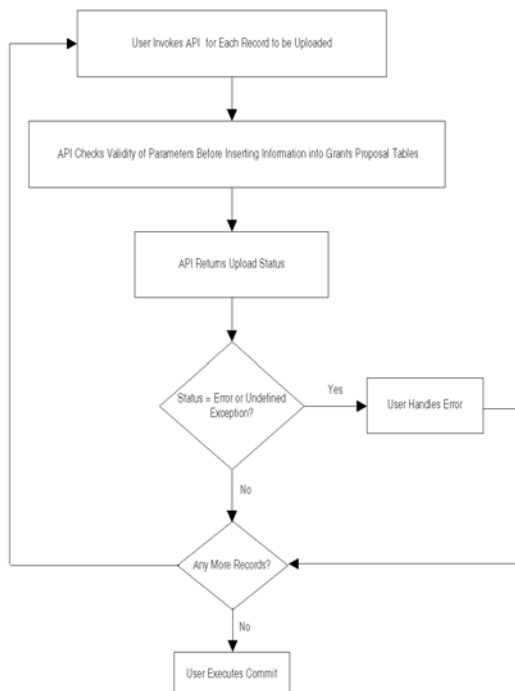
Table D-1 API Usage

Event	Description
1.	Users call FND_GLOBAL.APPS_INITIALIZE.
2.	Users call API for each record to be uploaded.
3.	Users handle errors returned by API if X-return status is E or U.
4.	Users execute commit explicitly if the parameter P-COMMIT is FALSE when invoking the API.

API Usage Flowchart

Figure D-1 shows the API usage flowchart as described in Table D-1.

Figure D-1 API Usage Flowchart



Uploading Basic Proposal Data

Package IGW_CREATE_PROPOSAL_PUB contains the API to upload basic proposal data. [Table D-2](#) lists the parameters for the IGW_CREATE_PROPOSAL_PUB.CREATE_PROPOSAL procedure.

Table D-2 Parameters for the IGW_CREATE_PROPOSAL_PUB.CREATE_PROPOSAL Procedure

Parameter	Usage	Type	Description
P_VALIDATE_ONLY	IN	VARCHAR2	invokes API in validation mode
P_COMMIT	IN	VARCHAR2	commits inserted data into Grants Proposal tables
P_PROPOSAL_NUMBER	IN	VARCHAR2	proposal number; unique number assigned to the proposal
P_PROPOSAL_TITLE	IN	VARCHAR2	user-defined proposal title
P_PROPOSAL_START_DATE	IN	DATE	start date of proposed research project
P_PROPOSAL_END_DATE	IN	DATE	end date of proposed research project
P_PROPOSAL_TYPE	IN	VARCHAR2	seeded proposal types; users can also add user-defined proposal types. Seeded options include New, Competing Continuation, Non-Competing Continuation, Revision, and Supplemental.
P_PROPOSAL_MANAGER_NAME	IN	VARCHAR2	proposal manager name
P_SPONSOR_NAME	IN	VARCHAR2	funding source to which the proposal is submitted

Table D–2 Parameters for the IGW_CREATE_PROPOSAL_PUB.CREATE_PROPOSAL Procedure

Parameter	Usage	Type	Description
P_ACTIVITY_TYPE	IN	VARCHAR2	system-defined type of activity that the proposed research is requesting funding for. Options include Research for research grants, Instruction for instructional or training grants, Fellowships for supporting postdoctoral fellows, Public Service for a public service project, Student Service for a research proposal supporting students, Hospital, Hospital Affiliate, and Other for any other purpose.
P_SIGNING_OFFICIAL_NAME	IN	VARCHAR2	name of individual who signs the proposal on behalf of the applicant organization before the proposal is submitted to the sponsor
P_ADMIN_OFFICIAL_NAME	IN	VARCHAR2	name of the individual who signs the proposal on behalf of the applicant unit
P_LEAD_ORGANIZATION_NAME	IN	VARCHAR2	organization or department that coordinates and administers the proposal development tasks
P_FUNDING_SPONSOR_UNIT	IN	VARCHAR2	a component or subsidiary of the funding source to which the proposal is submitted
P_ORIGINAL_SPONSOR_NAME	IN	VARCHAR2	original funding source
P_ORIGINAL_PROPOSAL_NUMBER	IN	VARCHAR2	original proposal number assigned to the proposal by the user
P_ORIGINAL_AWARD_NUMBER	IN	VARCHAR2	a sponsor-assigned number used to uniquely identify the funded project; this field is blank for new proposals
P_ORIGINAL_PROPOSAL_START_DATE	IN	DATE	starting date of original research project

Table D-2 Parameters for the IGW_CREATE_PROPOSAL_PUB.CREATE_PROPOSAL Procedure

Parameter	Usage	Type	Description
P_ORIGINAL_PROPOSAL_END_DATE	IN	DATE	ending date of original research project
X_RETURN_STATUS	OUT	VARCHAR2	status of the upload; possible values are S = Success, E = Error, and U = Undefined Exception
X_MSG_COUNT	OUT	NUMBER	total number of error messages stored in the error stack
X_MSG_DATA	OUT	VARCHAR2	error message text if upload failure occurs due to a single error

Uploading Proposed Work Sites

Package `IGW_PROP_LOCATIONS_PUB` contains the API to upload proposed work sites data. [Table D-3](#) lists the parameters for the `IGW_PROP_LOCATIONS_PUB.CREATE_PERFORMING_SITE` procedure.

Table D-3 *Parameters for the
IGW_PROP_LOCATIONS_PUB.CREATE_PERFORMING_SITE Procedure*

Parameter	Usage	Type	Description
<code>P_VALIDATE_ONLY</code>	IN	VARCHAR2	invokes API in validation mode
<code>P_COMMIT</code>	IN	VARCHAR2	commits inserted data into Grants Proposal tables
<code>P_PROPOSAL_NUMBER</code>	IN	VARCHAR2	proposal number of the previously submitted proposal; required for continuation
<code>P_PERFORMING_ORG_NAME</code>	IN	VARCHAR2	name of the organization where the research is performed
<code>X_RETURN_STATUS</code>	OUT	VARCHAR2	status of the upload; possible values are S = Success, E = Error, and U = Undefined Exception
<code>X_MSG_COUNT</code>	OUT	NUMBER	total number of error messages stored in the error stack
<code>X_MSG_DATA</code>	OUT	VARCHAR2	error message text if upload failure occurs due to a single error

Uploading Proposal Persons

Package IGW_PROP_PERSONS_PUB contains the API to upload proposal persons data. [Table D-4](#) lists the parameters for the IGW_PROP_PERSONS_PUB.CREATE_PROP_PERSON procedure.

Table D-4 Parameters for the IGW_PROP_PERSONS_PUB.CREATE_PROP_PERSON Procedure

Parameter	Usage	Type	Description
P_VALIDATE_ONLY	IN	VARCHAR2	invokes API in validation mode
P_COMMIT	IN	VARCHAR2	commits inserted data into Grants Proposal tables
P_PROPOSAL_NUMBER	IN	VARCHAR2	proposal identifier
P_FULL_NAME	IN	VARCHAR2	person's first and last name
P_PROPOSAL_ROLE_DESC	IN	VARCHAR2	user-defined role of person on the proposed project
P_PI_FLAG	IN	VARCHAR2	proposal manager of the project
P_KEY_PERSON_FLAG	IN	VARCHAR2	key person on the project
P_PERCENT Effort	IN	NUMBER	percentage of time that the selected employee devotes to the project
P_PERSON_UNIT_NAME	IN	VARCHAR2	organizational unit of person's primary appointment
X_RETURN_STATUS	OUT	VARCHAR2	status of the upload; possible values are S = Success, E = Error, and U = Undefined Exception
X_MSG_COUNT	OUT	NUMBER	total number of error messages stored in the error stack
X_MSG_DATA	OUT	VARCHAR2	error message text if upload failure occurs due to a single error

Uploading Paragraphs

Package `IGW_PROP_ABSTRACTS_PUB` contains the API to upload paragraph data. [Table D-5](#) lists the parameters for the `IGW_PROP_ABSTRACTS_PUB.CREATE_PROP_ABSTRACT` procedure.

**Table D-5 Parameters for the
`IGW_PROP_ABSTRACTS_PUB.CREATE_PROP_ABSTRACT` Procedure**

Parameter	Usage	Type	Description
<code>P_VALIDATE_ONLY</code>	IN	VARCHAR2	invokes API in validation mode
<code>P_COMMIT</code>	IN	VARCHAR2	commits inserted data into Grants Proposal tables
<code>P_PROPOSAL_NUMBER</code>	IN	VARCHAR2	proposal identifier
<code>P_ABSTRACT_TYPE_DESC</code>	IN	VARCHAR2	system-defined paragraph types; values include Abstract, Project Description, Specific Aims, Bibliography/References, Budget Justification, Program Income, Cover Letter, Progress Report, Unobligated Balance, Inventions, and Significant Rebudgeting.
<code>P_ABSTRACT</code>	IN	VARCHAR2	user-entered text that describes the selected paragraph type
<code>X_RETURN_STATUS</code>	OUT	VARCHAR2	status of the upload; possible values are S = Success, E = Error, and U = Undefined Exception
<code>X_MSG_COUNT</code>	OUT	NUMBER	total number of error messages stored in the error stack
<code>X_MSG_DATA</code>	OUT	VARCHAR2	error message text if upload failure occurs due to a single error

Uploading Special Reviews

Package IGW_PROP_SPECIAL_REVIEW_PUB contains the API to upload special reviews data. [Table D-6](#) lists the parameters for the IGW_PROP_SPECIAL_REVIEW_PUB.CREATE_PROP_SPECIAL_REVIEW procedure.

**Table D-6 Parameters for the
IGW_PROP_SPECIAL_REVIEW_PUB.CREATE_PROP_SPECIAL_REVIEW
Procedure**

Parameter	Usage	Type	Description
P_VALIDATE_ONLY	IN	VARCHAR2	invokes API in validation mode
P_COMMIT	IN	VARCHAR2	commits inserted data into Grants Proposal tables
P_PROPOSAL_NUMBER	IN	VARCHAR2	proposal identifier
P_SPECIAL_REVIEW_DESC	IN	VARCHAR2	special review type; seeded options include Human Subjects or Vertebrate Animals.
P_SPECIAL_REVIEW_TYPE_DESC	IN	VARCHAR2	seeded options include Full or Expedited. Full indicates that the organization's Institutional Review Board (IRB) conducts a full, detailed review. Expedited indicates that the organization's Institutional Review Board (IRB) conducts an abbreviated review.
P_APPLICATION_DATE	IN	DATE	date special review form is filed with special review committee
P_APPROVAL_TYPE_DESC	IN	VARCHAR2	approval status of the special review item; seeded options include Approved, Pending, or Rejected.
P_PROTOCOL_NUMBER	IN	VARCHAR2	identifier assigned to the protocol form after approval by the special review committee
P_APPROVAL_DATE	IN	DATE	date special review committee approves protocol form
P_COMMENTS	IN	VARCHAR2	descriptive text

**Table D–6 Parameters for the
IGW_PROP_SPECIAL_REVIEWS_PUB.CREATE_PROP_SPECIAL_REVIEW
Procedure**

Parameter	Usage	Type	Description
X_RETURN_STATUS	OUT	VARCHAR2	status of the upload; possible values are S = Success, E = Error, and U = Undefined Exception
X_MSG_COUNT	OUT	NUMBER	total number of error messages stored in the error stack
X_MSG_DATA	OUT	VARCHAR2	error message text if upload failure occurs due to a single error

Uploading Budgets

Package IGW_BUDGETS_PUB contains the API to upload budget data. [Table D-7](#) lists the parameters for the IGW_BUDGETS_PUB.CREATE_BUDGET_VERSION procedure.

Table D-7 Parameters for the IGW_BUDGETS_PUB.CREATE_BUDGET_VERSION Procedure

Parameter	Usage	Type	Description
P_VALIDATE_ONLY	IN	VARCHAR2	invokes API in validation mode
P_COMMIT	IN	VARCHAR2	commits inserted data into Grants Proposal tables
P_PROPOSAL_NUMBER	IN	VARCHAR2	proposal number
P_START_DATE	IN	DATE	budget version start date
P_END_DATE	IN	DATE	budget version start date
P_OH_RATE_CLASS_NAME	IN	VARCHAR2	rate class; overhead rate classes include MTDC (Modified Total Direct Costs), Total Direct Costs (TDC), or Salary and Wages (S&W)
P_PROPOSAL_FORM_NUMBER	IN	VARCHAR2	sponsor budget hierarchy
P_TOTAL_COST_LIMIT	IN	NUMBER	maximum dollar ceiling on a proposal budget
P_TOTAL_COST	IN	NUMBER	sum of direct costs plus indirect costs for all budget periods; cost of the proposal budget. This amount is requested from the sponsor.
P_TOTAL_DIRECT_COST	IN	NUMBER	sum of direct costs for all budget periods; costs that are directly attributable to work performed; examples include salaries and travel expenses. This field displays data when the budget status is Complete.

Table D-7 Parameters for the IGW_BUDGETS_PUB.CREATE_BUDGET_VERSION Procedure

Parameter	Usage	Type	Description
P_TOTAL_INDIRECT_COST	IN	NUMBER	sum of indirect costs for all budget periods; indirect costs are also known as overhead costs or F&A costs. F&A costs are costs incurred by the organization for conducting research. Sum of costs that support direct costs and cannot be directly attributed to work performed.
P_COST_SHARING_AMOUNT	IN	NUMBER	amount that the organization cost-shares toward the research project. This field displays data when the budget status is Complete.
P_UNDERRECOVERY_AMOUNT	IN	NUMBER	amount of overhead costs that an organization does not recover
P_RESIDUAL_FUNDS	IN	NUMBER	dollar amount of funds that remain from a previous year's budget
P_FINAL_VERSION_FLAG	IN	VARCHAR2	final budget version submitted for internal routing and approval
P_ENTER-BUDGET_AT_PERIOD_LEVEL	IN	VARCHAR2	if selected, users can enter budget items at the period level, but not at the budget line level
P_APPLY_INFLATION_SETUP_RATES	IN	VARCHAR2	if selected, inflation rates defined during setup are applied to expenditure types
P_APPLY_EB_SETUP_RATES	IN	VARCHAR2	if deselected, users can enter amounts in the Cost and Cost Sharing fields in the Employee Benefits region of the Line Details page
P_APPLY_OH_SETUP_RATES	IN	VARCHAR2	if deselected, users can enter amounts in the Cost and Cost Sharing fields in the Overhead region of the Line Details window.
P_COMMENTS	IN	VARCHAR2	descriptive text

Table D-7 Parameters for the IGW_BUDGETS_PUB.CREATE_BUDGET_VERSION Procedure

Parameter	Usage	Type	Description
X_RETURN_STATUS	OUT	VARCHAR2	status of the upload; possible values are S = Success, E = Error, and U = Undefined Exception
X_MSG_COUNT	OUT	NUMBER	total number of error messages stored in the error stack
X_MSG_DATA	OUT	VARCHAR2	error message text if upload failure occurs due to a single error

Uploading Budget Periods

Package `IGW_BUDGET_PERIODS_PUB` contains the API to upload basic budget periods data. [Table D-8](#) lists the parameters for the `IGW_BUDGET_PERIODS_PUB.CREATE_BUDGET_PERIOD` procedure.

**Table D-8 Parameters for the
`IGW_BUDGET_PERIODS_PUB.CREATE_BUDGET_PERIOD` Procedure**

Parameter	Usage	Type	Description
<code>P_VALIDATE_ONLY</code>	IN	VARCHAR2	invokes API in validation mode
<code>P_COMMIT</code>	IN	VARCHAR2	commits inserted data into Grants Proposal tables
<code>P_PROPOSAL_NUMBER</code>	IN	VARCHAR2	proposal number
<code>P_VERSION_ID</code>	IN	NUMBER	budget version identifier
<code>P_BUDGET_PERIOD_ID</code>	IN	NUMBER	chronological numerical identifier associated with a period
<code>P_START_DATE</code>	IN	DATE	start date of budget period; budget period default is 12 months.
<code>P_END_DATE</code>	IN	DATE	end date of budget period; budget period default is 12 months.
<code>P_TOTAL_COST_LIMIT</code>	IN	NUMBER	maximum dollar ceiling on a proposal budget
<code>P_TOTAL_COST</code>	IN	NUMBER	sum of direct cost plus indirect cost for the budget period; calculated by the system
<code>P_TOTAL_DIRECT_COST</code>	IN	NUMBER	total direct cost of budget period calculated by the system; costs that can be directly attributable to work performed.
<code>P_TOTAL_INDIRECT_COST</code>	IN	NUMBER	total indirect cost of budget period calculated by the system; costs that support direct costs and cannot be directly attributable to work performed.

**Table D–8 Parameters for the
IGW_BUDGET_PERIODS_PUB.CREATE_BUDGET_PERIOD Procedure**

Parameter	Usage	Type	Description
P_COST_SHARING_AMO UNT	IN	NUMBER	amount that the organization cost-shares toward the research project for the entire proposal budget.
P_UNDERRECOVERY_AM OUNT	IN	NUMBER	overhead costs that organization does not recover
P_PROGRAM_INCOME	IN	VARCHAR2	anticipated income generated from project
P_PROGRAM_INCOME_S OURCE	IN	VARCHAR2	source of anticipated income generated from project
X_RETURN_STATUS	OUT	VARCHAR2	status of the upload; possible values are S = Success, E = Error, and U = Undefined Exception
X_MSG_COUNT	OUT	NUMBER	total number of error messages stored in the error stack
X_MSG_DATA	OUT	VARCHAR2	error message text if upload failure occurs due to a single error

Electronic Proposal Submission

This appendix describes the generation of the flat file by Oracle Grants Proposal and how it is used for electronic proposal submission. The following sections are in this appendix:

- [Definition](#)
- [Overview](#)
- [Oracle Grants Proposal EDI Process](#)
- [194 Transaction Set Sponsor Budget Hierarchy](#)
- [Oracle Grants Proposal Flat File Structure](#)
- [Interface Flat File Definition](#)

Definition

The electronic transmission of proposals to sponsors in a standard format is accomplished using Electronic Data Interchange (EDI).

Overview

Grants Proposal interfaces with e-Commerce Gateway to provide a front-end flat file. The flat file is used to electronically submit proposals to sponsors. Depending on the EDI translation and mapping software, users can map to the format of the flat file to create an EDI-formatted 194 Transaction Set, or electronic proposal, which can be transmitted to the appropriate sponsor. [Figure E-1](#), page E-4 shows the Grants Proposal EDI Process.

The functionality described in this section is available in the self-service version of Grants Proposal.

Historical Overview

The final output of Grants Proposal is a complete proposal that has been approved by the organization's authorities and is ready for submission to the funding sponsor. Historically, proposals have been submitted to sponsors on sponsor-specific paper forms. This submission process is changing rapidly as new technologies are emerging.

The efforts of Federal sponsors to reduce the use of paper has also been a major factor in exploring alternative methods for proposal submission. After years of working on the Electronic Research Administration project, many Federal sponsors have developed procedures to accept Grants Proposal via Electronic Data Interchange in the form of the ASC X12 194 Transaction Set.

Flat File Design and Development

Grants Proposal uses the data elements required by the 194 Transaction Set as it is defined in the implementation guides by Federal sponsors, such as the National Institute of Health and the National Science Foundation. During proposal development, users enter data that is required by the 194 Transaction Set. Once the proposal is complete and approved by the organization's officials, users run a concurrent process to create the flat file. This process runs a data extraction program in the background, which extracts the data from the proposal to create the flat file.

[Figure E-3](#), page E-6 shows the structure of the Grants Proposal flat file. Grants Proposal provides users with a flat file layout, which defines the data elements and

their respective positions. Each row in the flat file contains a record number. Each record accommodates one or more proposal data elements in predefined positions.

Before creating the flat file, users are required to setup trading partners in e-Commerce Gateway. For example, to send an EDI proposal to the National Institute of Health and the National Science Foundation, users must setup trading partners for both the National Institute of Health and the National Science Foundation.

Another important setup in e-Commerce Gateway is code conversion. By setting up code conversion in e-Commerce Gateway, users can convert codes used in Oracle Applications to the codes required by the trading partners in the 194 Transaction Set. For example, the 194 Transaction Set for the National Institute of Health requires a value of PI for the Principal Investigator, whereas the 194 Transaction Set for the National Science Foundation requires a value of Senior Personnel for the Principal Investigator. This can be accomplished by code conversion. Larger data elements from the applications are broken into smaller data elements in the flat file. For example, the paragraph data element from the application, which is 4,000 characters, is stored in 10 records of 400 characters each in the flat file.

194 Transaction Set Sponsor Budget Hierarchy

A proposal budget can be prepared in the specific budget hierarchy as defined in the ASC X12 194 Transaction Set. [Figure E-2](#), page E-5 shows the layout of this hierarchy, which illustrates the relationship of one budget category to another. For example, Total Direct Costs (09) is made up of three budget categories: Labor Overhead Costs (06), Other Overhead Costs (08), and General & Administrative Costs (33).

While preparing a proposal budget, users can map the budget expenditure category to the sponsor budget category. Consequently, the sponsor receives the budget in the 194 budget categories, rather than in the user-defined expenditure categories. In Grants Proposal, the 194 transaction set sponsor budget hierarchy is seeded.

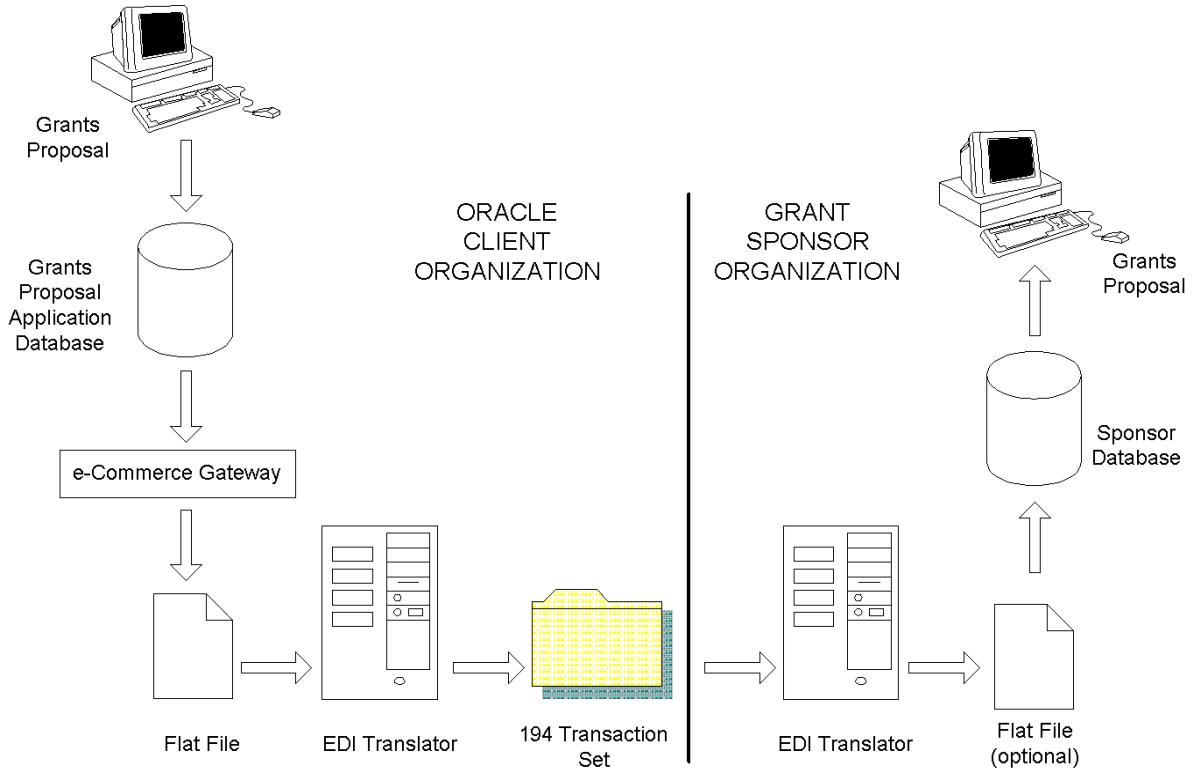
References

For information on information on setting up trading partners, see *Defining Trading Partner Data*, *Oracle e-Commerce Gateway User's Guide*.

Oracle Grants Proposal EDI Process

Figure E-1 shows the Grants Proposal EDI process as described in the text.

Figure E-1 Grants Proposal EDI Process

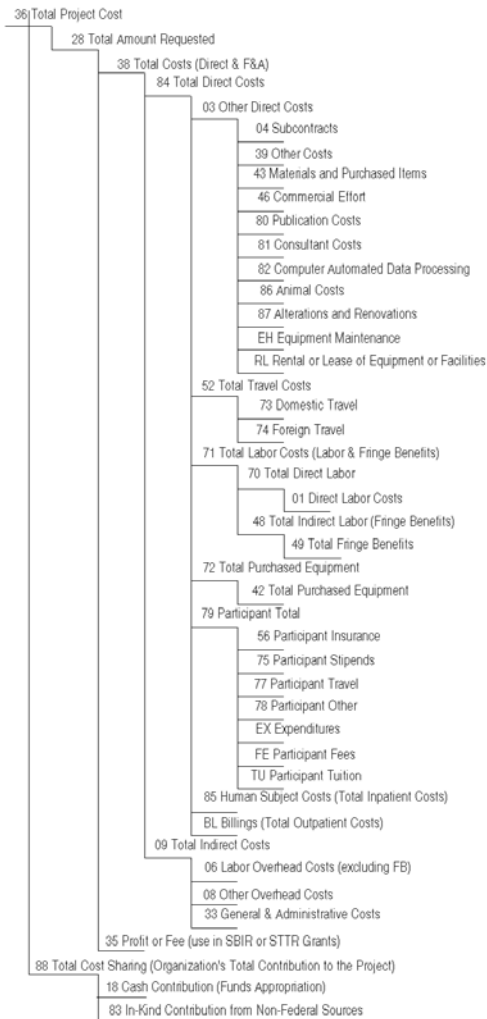


Oracle Grants Proposal EDI Process

194 Transaction Set Sponsor Budget Hierarchy

Figure E-2 shows the 194 Transaction Set sponsor budget hierarchy as described in the text.

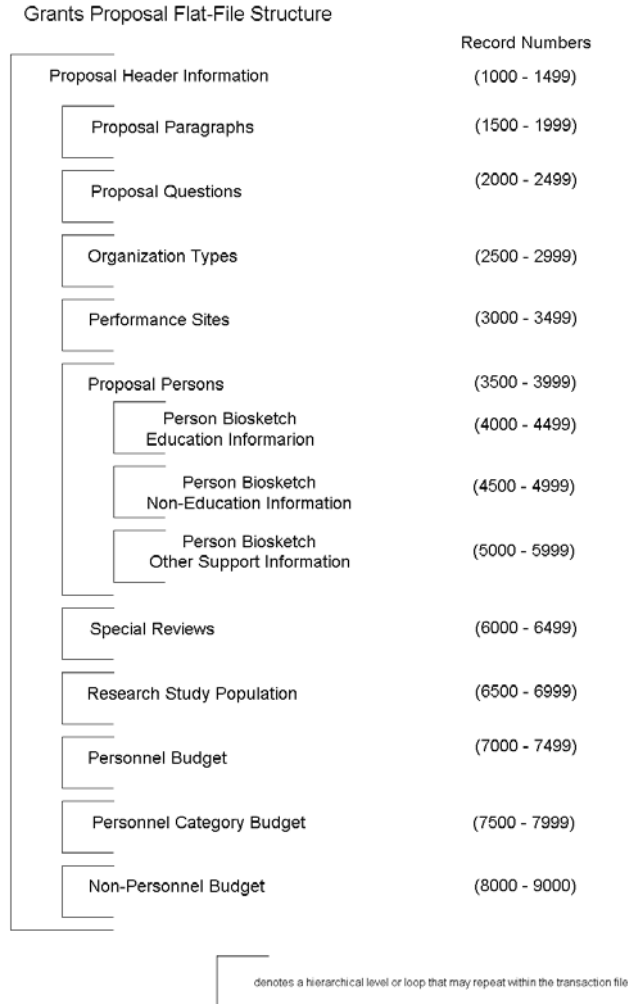
Figure E-2 194 Transaction Set Sponsor Budget Hierarchy



Oracle Grants Proposal Flat File Structure

Figure E-3 shows the Grants Proposal flat file structure as described in the text.

Figure E-3 Grants Proposal Flat File Structure



Interface Flat File Definition

To review the detailed structure of the flat file, perform the following steps.

1. In e-Commerce Gateway, navigate to the Interface Definition window as follows:

Setup - Interface File Definition

2. Go to the View Menu and navigate as follows:

Query By Example - Enter

3. In the Transaction field, enter PRPO.

4. Go to the View Menu and navigate as follows:

Query By Example - Run

The data appears.

5. Close the window.

Oracle Grants Proposal Navigation Paths

This appendix lists navigation paths for setup windows in Oracle Grants Proposal. The following section is in this appendix:

- [Navigation](#)

Navigation

Table F-1 shows the navigation path for each setup window in Grants Proposal.

Table F-1 Grants Proposal Navigation Paths for Setup Windows

Grants Proposal Setup Window	Navigation Path
Assign Expenditure Categories	Setup - Budgets - Assign Expenditure Categories
Biographical Sketch (Education)	Setup - Biographical Sketch
Biographical Sketch (Experience)	Setup - Biographical Sketch Click Experience
Create Business Rules	Setup - Business Rules
Create Roles	Setup - Proposal Roles
Expenditure Categories	Setup - Budgets - Expenditure Categories/Types
Expenditure Types	Setup - Budgets - Expenditure Categories/Types Click Expenditure Types
Implementation Options	Setup - Implementation Options
List of Questions	Setup - Questions
Maps	Setup - Maps
Organization Details	Setup - Organization Details
Organization Questions	Setup - Organization Details Select Organization Details Tab Click Organization Questions
Organization Types	Setup - Organization Details Select Organization Details Tab Click Organization Types
Question Detail	Setup - Questions Click Open or New
Rate Classes and Rate Types	Setup - Budgets - Rates
Rates	Setup - Budgets - Rates Click Rates
Sponsor Budget Hierarchy	Setup - Budgets - Sponsor Budget Hierarchy

Glossary

194 grant or assistance application

The electronic standard established by the federal government for transmitting a grant proposal via EDI. See *194 Transaction Set*.

194 transaction set

The electronic standard established by the federal government for transmitting a grant proposal via EDI. See *194 Grant or Assistance Application*.

abstract

A summary of the proposal that the government publishes. An abstract is approximately 250 words and is public information.

activity type

Type of activity that the proposed research is requesting funding for. Examples of activity types include Research for research grants, Instruction for instructional or training grants, Fellowships for supporting postdoctoral fellows, Public Service for a public service project, Student Service for a research proposal supporting students, and Hospital.

agency

A funding source; typically a government agency.

applicant unit

The organization through which the proposal is developed and administered. The proposal manager is affiliated with the lead unit.

approval hierarchy

A ranking of approval organizations, starting with the organization preparing the proposal and ending with the top-most organization.

approval map

The hierarchy and sequence of proposal approval stops, including the signatory authorities within each stop. Maps list both primary and alternate approvers. See *map*.

approved proposal

A proposal, which includes proposal data, a narrative module, and a budget, that has been internally approved and shows a proposal status of Approved in the header region of the Proposals window.

approver

Persons who receive proposals for review and approval.

award

Grant or contract received by an organization, which is used to fund one or more projects. An award is a funding installment, which typically represents a budget year.

award amount

Total of all installments.

award budget

A detailed estimate of the cost of that portion of a project funded by a particular award.

award roles

User-defined functions that people perform in activities funded by an award. Typical award roles include Award Manager, Principal Investigator, Technician, Research Assistant, and Post-Doctoral Fellow.

award template

Predefined award data that repeats from award to award and is used to simplify and standardize award entry. Users typically create an award template for each funding source.

award terms and conditions

Sponsor-determined requirements for managing an award. Typical examples of award terms and conditions categories include confidentiality, intellectual property, publications, salaries, and travel.

award type

An implementation-defined classification of awards. Typical award types include federal grants and private grants.

baselining

The process of approving a budget for use in reporting and accounting.

biographical sketch

Educational, research, and professional experience information about an individual.

budget

An estimate of cost for a task or project.

business rule

A prescribed mathematical method that determines how a proposal is routed during the approval process. It includes a user-defined condition. If the condition is true, the proposal is routed electronically to a hierarchical list of approvers for review through an approval map.

capital project

A project that tracks asset development activities and costs, and capitalizes costs when the asset is placed in service.

condition

The sum of all expressions relating to a business rule. A condition can include one or more expressions.

descriptive flexfield

A field that users can extend to capture extra information not otherwise tracked by Oracle Applications. A descriptive flexfield appears on a form as a single character, unnamed field. Users can customize this field to capture additional information unique to its business.

direct costs

Costs that are directly attributable to work performed. Examples of direct costs are salaries and travel expenses.

EB (employment benefit) rates

Employment fringe benefits, such as health insurance and workmen's compensation. EB rates may differ by type of employee. See *employment benefit rates*.

EDI (electronic data interchange)

The electronic transmission of routine business documents in a standard electronic format from one computer to another. See *electronic data interchange*.

electronic data interchange (EDI)

The electronic transmission of routine business documents in a standard format from one computer to another. See *EDI*.

employment benefit (EB) rates

The sum of all fringe benefits that institutions are required to pay, such as disability insurance, life insurance, health insurance, and workmen's compensation. Employment benefit rates are expressed as a fixed percentage of salary and may differ by type of employee, such as faculty and non-faculty employees. Employment benefit rates are typically defined for each fiscal year for which a proposal is developed.

expenditure category

User-defined cost classifications to which expenditure items are assigned.

expenditure type

User-defined cost classifications that are assigned to each expenditure item.

expression

A mathematical combination of symbols in a business rule that has a left hand side value and a right hand side value separated by a mathematical operator, such as >, <, or =.

F&A (facility and administration) cost rates

A federal government term that refers to indirect costs. F&A costs are recovered by the institution from the funding source, usually as a percentage of the direct costs. The institution negotiates F&A rates with the federal government for a four to five year period. The F&A rates are institution specific, not grant specific and may differ

by the type of research conducted. See *indirect costs*, *overhead*, and *facility and administration cost rates*.

facility and administration cost rates

A federal government term that refers to indirect costs. F&A rates are recovered by the institution from the funding source, usually as a percentage of the direct costs. The institution negotiates F&A rates with the federal government for a four to five year period. The F&A rates are institution specific, not grant specific and may differ by the type of research conducted. See *indirect costs*, *overhead*, and *F&A cost rates*.

funded amount

The total of all active installments.

funding source

A governmental agency, a private firm, or an individual that provides funding for a project.

grantee

The receiver of a grant.

grantor

A person or organization that makes a grant.

IRB (institutional review board)

A committee in each organization that focuses on research protocol. The IRB assigns a protocol number to the proposal after reviewing and approving the protocol form. See *institutional review board*.

indirect costs

Costs that support direct costs and cannot be directly attributed to work performed. Examples of indirect costs are fringe benefits, office space, and general and administrative costs. See *overhead* and *F&A costs*.

inflation rate

Percentages that adjust for inflation increases on proposal budget items. Inflation rates are applied to most salary and non-salary budget items, except equipment. They are typically defined for each fiscal year for which a proposal is developed.

installment

A portion of the total award funding, which is received in fixed amounts at specified intervals.

institutional review board (IRB)

A committee in each organization that focuses on research protocol. The institutional review board assigns a protocol number to the proposal after reviewing and approving the protocol form. See *IRB*.

key person

An employee who is assigned an important role on the project for which the proposal is submitted.

keywords

User-defined identifiers used in preparing the proposal.

MTDC (modified total direct costs)

A rate class expressed as a percentage. This percentage is negotiated with the federal government and is used to calculate indirect costs. A class of overhead, which is the sum of all direct costs minus equipment, capital expenditure, tuition remission, scholarships, fellowships, rental costs of off-site facilities, patient care costs, and consortium or contractual costs in excess of \$25,000 for each funding cycle.

map

The hierarchy and sequence of proposal approval stops, including the signatory authorities within each stop. Maps list both primary and alternate approvers. See *approval map*.

modified total direct costs (MTDC)

A rate class expressed as a percentage. This percentage is negotiated with the federal government and is used to calculate indirect costs. A class of overhead, which is the sum of all direct costs minus equipment, capital expenditure, tuition remission, scholarships, fellowships, rental costs of off-site facilities, patient care costs, and consortium or contractual costs in excess of \$25,000 for each funding cycle. See *MTDC*.

module

A section or chapter of the narrative portion of the proposal.

multi-funding

A feature that allows users to fund multiple projects from a single award and a single project from multiple awards.

narrative

The research plan portion of the proposal. Specific sections of the narrative are typically written by different members of the project team. These sections are called narrative modules.

notification business rule

A business rule that notifies personnel of an activity, but does not require approval. Everyone in the applicable map is notified that the proposal has been submitted for approval and routing. An example of a notification business rule is the following: If the sponsor type is a Foundation in a proposal, then notify the Dean when the proposal is submitted. Organizations can have more than one notification business rule.

OSP (office of sponsored programs)

The proposal approval authority for the organization. The OSP reviews proposals and accepts awards from the funding source.

office of sponsored programs (OSP)

The proposal approval authority for the organization. The OSP reviews proposals and accepts awards from the funding source.

organization

The levels, departments, or schools within an organization.

overhead

Costs incurred by the organization for conducting research. Overhead rates are also known as indirect costs. Overhead rates are recovered by the organization from the funding source, usually as a percentage of direct costs. Referred to as F&A (Facility and Administration) rates by the federal government. See *indirect costs*.

overhead rate

Costs incurred by the organization for conducting research. Overhead rates are also called indirect costs. Overhead rates are recovered by the organization from the funding source, usually as a percentage of direct costs. Referred to as F&A (Facility and Administration) rates by the federal government. See *indirect costs*.

overhead type

Type of overhead. Examples include modified total direct costs and salary and wages.

process

An activity or set of activities that run in the background to accomplish a specific goal.

project budget

A detailed estimate of the cost of a project. A project budget is the aggregate of all the award budgets that fund a project.

project funding

An allocation of funds, generated revenue amounts, and invoiced amounts from an award to a project or top task.

project template

Predefined project data. A project template includes basic and variable project data, the work breakdown structure, project and task options, funding data, and budgets.

project type

A project classification that is defined during implementation that specifies essential project attributes. Users define a project type for each project.

proposal

A collection of documents that is submitted to a funding agency for the purpose of obtaining funding for a research project. A proposal includes a research plan, a budget, information on key project personnel, an abstract that describes the project, and other supporting documents. A proposal is a written plan and justification in which the organization informs the prospective funding source what it needs in terms of budget items, equipment, supplies, and personnel to conduct specific research.

proposal budget

An estimate of the direct and indirect costs of conducting the proposed research. A proposal budget can be for one or multiple budget periods.

proposal manager

A title or role that allows the designee to create the proposal. The Proposal Manager may also be the Proposal Owner. See *proposal owner*.

proposal owner

A title or role that allows the designee to submit proposals and apply for research funding. See *proposal manager*.

proposal role

A user-defined functional title that is associated with system-defined proposal rights. Proposal roles with their associated rights restrict individuals' access to one or more parts of a proposal.

proposal stop

An office or department within the organization that reviews specific proposal information.

purpose code

A user-defined description of an activity that an award is funding. Purpose codes are used to identify the purpose of award funds. Typical examples include descriptions such as research, clinical trial, and sponsored training.

rate

A percentage that is used to calculate indirect costs for research proposal budgets. A rate is also called a cost rate.

rate class

A subset of a system-defined rate class type. Examples of rate classes that are subsets of overhead rates include Modified Total Direct Costs, Total Direct Costs, and Salary and Wages.

rate class type

A subset of a rate class. Examples of rate types include Inflation, Employee Benefits, or Overhead.

report

Sponsor-specific grant application pages that can be printed individually.

residual funds

Dollar amount of funds that remain from a previous budget period. Residual funds are also called carry-over funds.

resource

Labor, services, materials, and equipment needed to track, complete, and account for project work.

resource list

A set of similar resources used on specific kinds of project work.

routing business rule

A business rule that specifies the sequence of proposal stops for review and approval. Users can assign a sequence to all routing business rules for a given organization. Each routing business rule is associated with a specific approval map. A proposal is routed for approval based upon the user-defined sequence.

S&W (salary and wages)

A rate class expressed as a percentage. This percentage is used to calculate indirect costs based on salary and wages only. See *salary and wages*.

salary and wages (S&W)

A rate class expressed as a percentage. This percentage is used to calculate indirect costs based on salary and wages only. See *S&W*.

sponsor

A funding source. A sponsor can be a governmental agency, a private firm, or an individual.

supplement

An installment type. Additional award funds.

TDC (total direct costs)

A rate class expressed as a percentage. This percentage is determined by the organization and is used to calculate indirect costs. Directs costs are costs that are directly attributable to work performed. Examples of direct costs are salaries and travel expenses. Total direct costs are the sum of all direct costs associated with a proposal. See *total direct costs*.

total direct costs (TDC)

A rate class expressed as a percentage. This percentage is determined by the organization and is used to calculate indirect costs. Directs costs are costs that are directly attributable to work performed. Examples of direct costs are salaries and

travel expenses. Total direct costs are the sum of all direct costs associated with a proposal. See *TDC*.

underrecovery

An amount that represents the overhead costs that the organization is not able to recover because the proposal is prepared with a smaller overhead rate.

validation business rule

A business rule that validates or invalidates certain conditions of a proposal. It does not seek approval. An example of a validation business rule is the following: If the underrecovery amount \geq \$10,000, then the proposal is invalid.

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