

Oracle Fusion Cloud Project Management

Using Grants Management

25B



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1 Grants Management Overview

Overview of Grants Management

Oracle Fusion Grants Management lets you manage the funding that you received from sponsors to execute a project in the form of an award. These projects can either be research or nonresearch projects.

Grants administrators and principal investigators can create awards and sponsored projects in the Awards work area. They can :

- Add one or more projects to an award and use these award projects to manage the award.
- Create award budgets to plan and manage the financial performance of award projects.
- Capture and process award costs, send invoices to sponsors, and recognize revenue.

Here are some organizations that receive funding from sponsors (the federal and nonfederal organizations) to execute sponsored projects:

- Higher education organizations, such as universities and colleges
- State and local government organizations
- Nonprofit organizations
- Healthcare organizations

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

Awards

When grants administrators or principal investigators receive a grant, they can create awards to manage the funding that they received in the grant.

Grants department administrators, who are granted access to one or more organizations, can create, view, and edit only those awards that belong to their organization.

2 Create Awards

Award Creation

You can create an award using one of these options in the Awards work area:

- The **Quick Create Award** task in the **Actions** panel tab.
- The **Create** icon on the Manage Awards page.
- The **Create Award from Template** button on the Manage Awards page.

When you create an award, you must define these details:

- Basic award details
- Project details
- Funding details (includes budget details)

The basic award details include the business unit, legal entity, contract type, primary sponsor, principal investigator, and award date range.

If you create an award using the **Quick Create Award** task or the **Create Award from Template** button, the award details, such as keywords, references, attachments, funding sources, organization credits, certifications, terms and conditions, personnel, ALN, and award descriptive flexfields are copied from the template. These award details are automatically copied from the award template.

Note: When you create an award, a contract is automatically created in Enterprise Contracts. To create a contract, you must be defined as a user in Customer Relationship Management who has the Contract Administrator resource role in the same business unit as the contract.

Considerations for Creating an Award

Here are a few points to keep in mind while specifying the award details when creating an award:

- Select the contract type only if the award template doesn't specify a contract type. If the award template specifies a contract type, then the award created from that template is associated with the contract type. If the contract type is set to auto numbering, then the Number field isn't displayed.
- You can also select a person who's active in HCM after the award start date as the principal investigator, only one principal investigator for a given period. To search and select a principal investigator with a future effective start date, click **Search** in the **Principal Investigator** list and select the **Include people with future-dated effective start dates** checkbox in the Search and Select: Principal Investigator page.
- If the award template and the sponsor don't use LOC billing, you can set the Federal Invoice Format to SF 270.

Here are a few points to keep in mind when you create the project and budget for an award:

- You can create and associate a project to an award irrespective of whether the project is enabled or not enabled for budgetary control.

- Only those sponsored projects for which the **Enable sponsored projects** checkbox is selected in the Edit project Type setup page are available for selection when associating a project to an award.
- When associating a project to an award, ensure that the business unit of the project and the award is the same.
- When associating a project to an award, ensure that the currency of the project matches the currency of the award.
- You can associate nonbillable projects only to an internal funding source.
- Quick entries aren't supported while creating a project from an award.

Create Awards Quickly

Use the Quick Create Award task in the panel drawer to quickly create an award.

You can use Quick Create only for external funding and only for the initial funding. If the award requires internal funding sources don't use Quick Create. Consider these points when creating an award quickly:

- When you create an award using the **Quick Create Award** task in the panel drawer:
 - If a project template is specified in the award template, then that project is automatically associated with the award with the award name and number as the project name and number. If the project is set to use the Automatic project numbering method, then the **Project Number** field isn't displayed.
 - You can create an award that's associated only to a primary sponsor.
 - The default award financial plan type is used to create the award project budget.
- You can't use the default financial plan type if it's enabled for budgetary control, but the project template isn't enabled for budgetary control.
- If the default financial plan type isn't enabled for budgetary control, but the project template and the project business unit are enabled for budgetary control, then ensure that the default financial plan type is an unapproved cost budget type.
- If the default financial plan type, the project template, and the project business unit are enabled for budgetary control, then ensure that the default financial plan type is an approved cost budget type.
- Funding for resources requires a default award financial plan type for sponsored projects, which is set up in Manage Financial Plan Types. While adding funding to resources, ensure that the total amount assigned to the top resources adds up to the total funding amount. For equipment, only top resources from the project primary planning resource breakdown structure (RBS) appear.

Follow these steps:

1. Click **Quick Create Award** in the panel drawer.
2. In the Create Award page, specify the award details as appropriate.
3. Click **Add Project**. Create a project or select an existing project and associate it with the award. You can create or select only one project per award using Quick Create.
4. Click **Add Funding**. Enter the funding details to create the base funding for the award using the first budget period and external funding source.
5. Click **Add Funding for Resource**. Enter the budget amount for the top resources from the project planning resource breakdown structure (RBS), such as labor, supplies, equipment, and burden expenses.

6. Click **Save and Close**.

The application validates the data and creates the award contract, project, funding, budget, and control budget. The award contract is created with the contract line, bill plan and project details to generate invoices and recognize revenue. The award funding is created and allocated to the project.

Note: If the **Submit contract for approval** check box is selected for the award template, then the contract is submitted for approval automatically. If there are errors from the contract validations, review and resolve the errors in the Contracts work area, and then submit the contract for approval from the Contracts work area. If the **Submit contract for approval** check box isn't selected, then you must submit the contract for approval from the Contracts work area.

Quick Create Example

This example lists key fields for Quick Create with example values and where the values come from. Quick Create has more or less fields depending on what's in the award template. Other fields include Letter of Credit, Document Number, Bill-to Account, and so on.

Create Award Fields

Field	Value	Description
Award Template Name	1 Year Funded Award	Automatically populated from the default award template for quick create. Select the template if there's no default template.
Currency	USD	Automatically populated
Contract Type	Sell: Project Award Hard Limit	Automatically populated from the award template or selected.
Name	Energy Update	Enter a name for the award
Number	R101	Enter an award number
Primary Sponsor	Environmental Protection Agency	Select the sponsor from the list.
Start Date/End Date	Dates span one year	Use the calendar to select dates. The dates must fall within the number of budget periods in the award template.
Principal Investigator	Brock Phillips	Select from the list of people enabled as principal investigators in Manage Grants Personnel.
Award Owning Organization	Maintenance US	Use the list to search and select the organization

Add Project Fields

Field	Value	Description
Association Method	Create New Project	Select Create or choose an existing project. Other project fields change according to the value in this field.

Field	Value	Description
Template Name	Sponsored Capital	Select from the list. Templates are created in Manage Project Templates.
Project Name	Energy Update	Populated from the previous region but can be changed.
Project Number	R101	Populated from the previous region but can be changed.
Project Manager	Brock Phillips	Populated from the previous region but can be changed.

Add Funding Fields

Field	Value	Description
Number	1	Enter a number
Date	October 1	Use the calendar to choose a date
Direct Funding Amount	100,000.00	Enter the amount
Indirect Funding Amount	50,000.00	Enter the amount or leave blank

Funding for Resources Fields

Field	Value	Description
Equipment	25,000.00	Only top resources from the project primary planning resource breakdown structure (RBS) appear.
Expenses	25,000.00	Enter an amount.
Labor	50,000.00	Enter an amount.
Overhead	50,000.00	Enter an amount.

Award Validations

When you create an award using the QuickCreate Award page, the award, award project, the award funding, and the award budget data is validated to ensure that the award is created correctly.

Use the Create Award from Template action or the Create icon in the Manage Awards page. Specify the details to create an award, award project, and award funding. Then click **Submit Contract** on the Review Award page to validate the award. If the validation is successful, the contract is submitted for approval and the award is created. If the validation fails, messages appear. Review and resolve the error and then click **Submit Contract**.

Note: You can also click **Validate** to validate the award.

Validations

Here's the list of critical validations and tasks to perform if the validation fails. Most of these validations apply to the Quick Create Award page unless noted in the specific validation.

Award and Award Objects	Validations	Tasks to Perform if the Validation Fails
Award	Checks if the award duration can be broken into the yearly budget periods that are specified in the award template.	Change either the award duration or the number of budget periods in the award template and then create the award. For example, if an award has 5 yearly budget periods, but you want to create an award with a duration of 4 years (01/01/2030 until 12/31/2033), then make one of the following changes: • Change the length of the award to 5 years. • Modify the award template such that it has only 4 budget periods.
Award billing attributes	Checks if the award uses the business unit specified in the award template, and if the following billing attributes are defined in the business unit implementation options: • Invoice method • Revenue method • Billing cycle • Net Invoice • Labor format • Nonlabor format • Event format • Invoice grouping • Generated invoice status • Transaction type Note: The above attributes are defaulted from the customer or the BU options. If you're creating the award using Create Award from Template or Create icon in the Manage Awards page, you can modify these in the Submit Contract window, if needed.	The Project Application Administrator must update the business unit implementation options in the Setup and Maintenance work area.
Award sponsor attributes	Checks if the following sponsor attributes are defined in the Manage Customers page: • Default payment term	The Project Application Administrator must update the sponsor details in the Manage Customers page in the Setup and Maintenance work area.

Award and Award Objects	Validations	Tasks to Perform if the Validation Fails
	• Primary bill-to site for the sponsor and account • Bill-to account • Ship-to account • Primary bill-to site for the related sponsor and account • Primary bill-to contact • Primary ship-to site for the customer, account, and business unit Note: The above attributes are defaulted from the customer or the BU options. If you're creating the award using Create Award from Template or the Create icon in the Manage Awards page, you can modify these in the Submit Contract window, if needed.	Note: If a primary contact exists at the site level, then that contact is used as the bill-to contact. Otherwise, the primary contact at the account level is used as the bill-to contact.
Award project	Checks if a project template is associated with an award template. If yes, then the award is created with a project that has the same project name and number as the award name and number.	None.
Award project	Checks if the award template doesn't specify a project template.	Select a project template and enter a unique project name and number. A project number isn't required if the project template uses the autonumbering method.
Award budget	Checks if the project template used by the award or award template has a primary planning resource breakdown structure.	Enter a primary planning resource breakdown structure on the project template that's associated with the award template.
Award budget	Checks if the financial plan type has the necessary settings to create an award budget.	Ensure that a default financial plan type exists for the award and meets the following conditions: • Is for an approved cost budget. • Isn't enabled for workflow approval. • Uses the award calendar type. • Is set as the default award financial plan type.
Award budget	Checks if the total budgeted amount for the resources adds up to the total funding amount.	Change the resource amounts or the funding amount.

Related Topics

- [Award Review Validations](#)
- [Award and Award Project Validations](#)

Award and Award Project Validations

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

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

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

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

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

Related Topics

- [Award Review Validations](#)

Import Awards

You can import awards, award projects, award funding, and other award details from third-party applications into the Awards work area by using the Import Awards macro-enabled Excel workbook template and running a few scheduled processes.

The Excel template is part of the External Data Integration Services for Oracle Cloud feature.

For more information on the Import Awards Excel workbook template, see the File-Based Data Import for Project Management guide.

To import the awards:

1. Prepare your data in the ImportAwards macro-enabled Excel workbook template.

Note: If you enter all the billing attributes or derive them from the grants business unit implementation options or Manage Sponsors page, then the contract line and bill plan details are created for the award. While importing the awards, you can review the Instructions sheet in the excel file on loading data and certain business rules.

2. Click Generate CSV File in the template to create a comma-separated values file of awards.
3. Navigate to the Scheduled Processes page.
4. Submit the Load Interface File for Import process to load the awards data from your CSV file into the applications-related open interface tables.
5. Submit the Import Awards process to bring the data into the Awards work area from the open interface tables.

Note: You can import awards with or without the award-related objects, but you can't import the award-related objects separately.

Parameters for Load Interface File for Import Process

From Award Number

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

To Award Number

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

Report Success Details

Indicates whether to include the successfully imported awards and award-related objects in the Import Award Report output report.

Output Reports

After the Import Awards process is complete, the Import Awards: Generate Reports process automatically runs and creates the following output reports:

- Import Award Report: Lists the successfully imported awards and award-related objects and the awards that failed the validations.
- Import Awards Rejections: Provides details about the awards that failed the validations. The application generates this report only if the process results in errors.

Review the output reports and repeat the following steps until you import all the required award data successfully:

- Correct the errors in the Import Awards Rejections report.
- Generate CSV files for the corrected awards and award-related objects.
- Upload the CSV files into the open interface tables.
- Submit the Import Awards process.

FAQs for Award Security

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

When you create an award, a contract is automatically created in Enterprise Contracts. To create a contract, you must be defined as a user in Customer Relationship Management with the Contract Administrator resource role in the same business unit as the contract.

If you aren't already defined as a user in Customer Relationship Management, then your implementation administrator can identify you as a user and assign the Contract Administrator resource role to you using the Manage Resources task in the Setup and Maintenance work area.

How can I ensure that a user can access and manage only the awards and projects of a particular organization, not those of the entire business unit?

You can assign the Grants Department Administrator role so that the user can manage only those awards and projects that belong to a particular organization in a business unit, instead of all the organizations of the business unit.

If the project organization isn't the same as the award organization, you can assign the user to the project organization using the Project Administrator role and Project Organization Classification context on the Manage Data Access page in the Setup and Maintenance work area.

To grant data access to the Grants Department Administrator role, assign the user to the Award Organization Hierarchy context available to the role and provide the organization hierarchy, version, and starting organization. The starting organization can be any node in the organization hierarchy. If you select a higher level organization, then the user can access awards that belong to the starting organization and any of the organizations beneath the starting organizations.

Only organization hierarchies, which are assigned to the project business unit on the Define Project Business Unit Implementations page, are available as organization hierarchies on the Manage Data Access page for Grants department administrators and the Award Organization Hierarchy context. Only the award templates and project templates belonging to the organizations in the award organization hierarchy are available to a user with the Grants Department Administrator role to create awards or projects.

What awards appear in the Awards work area?

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

For example, if you're both a grants administrator and a principal investigator, you can view the awards in the Awards work area for all the business units that you're assigned to and also the awards for which you're the principal investigator.

The following table describes the roles and the corresponding awards and award projects that are displayed in the Awards work area.

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

FAQs for Award Budgeting

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

Define the financial plan type to create approved cost budgets for award projects.

1. In the Setup and Maintenance work area, go to the **Manage Financial Plan Types** task.
2. Click the financial plan for sponsored projects.
3. In the Edit Financial Plan Type for Sponsored Project page, select the **Set as default award financial plan type** and **Enable budgetary controls** check boxes and clear the **Use workflow for status changes** check box.

3 Award Details

Edit an Award

Use the following tabs on the Edit Award Details page to edit the award details:

- **General:** Add or update award details, such as keywords, references, Assistance Listing Numbers, and so on.
- **Financial:** Define budget periods, funding sources, and organization credits to manage the financial transactions of the award project.
- **Compliance:** Capture and manage certifications and compliance information of the sponsor.
- **Personnel:** Define internal and external personnel for the award project. A person must have an assigned department and job for their employment data in HCM.

Note: Edit the award name in Enterprise Contracts. Start date and end date can be edited in Grants Management and the changes will propagate to Enterprise Contracts if there's only one contract line, one sales credit, and one default billing control. For an award contract, you can't edit the Primary Sponsor and Currency once the contract is created.

To edit an award:

1. Click **Manage Awards** in the panel drawer.
2. Click the award you want to edit.
3. Click **Edit**.
4. In the Edit Award Details page, edit the award details as appropriate.
5. Click **Save and Close**.

Award and Award Project General Details

After you create an award, you can specify the general attributes of an award using the General tab in the Edit Award Details page.

Similarly, you can specify the general attributes of an award project using the Management tab in the Manage Award Details page.

This table describes the general attributes of an award and award project:

General Attributes	Applies to	Description
General Details	Award	The general details of an award, such as purpose, type, and the following: • Organization: By default, this value is set to the principal investigator's primary organization that's defined in HCM. You can change the organization, if required. • Institution : By default, this value is set to the institution that's specified in the

General Attributes	Applies to	Description
		business unit implementation options. You can change the institution, if required. - Sponsor Award Number: The number that's tracked by the sponsor. - Assistance Listing Numbers: The numbers that identify the nature of funding received in the form of awards from sponsors.
Keywords	Award and award project	The subject category to track an award. Associate keywords with an award, award project, or principal investigator.
References	Award and award project	The additional references to the award or award project for identification purposes, for example, proposal number.
Attachments	Award and award project	The file or URL to attach to the award or award project.
Additional Information	Award and award project	The additional award or award project details, specific to your organization, that you can capture and track using the award and award project descriptive flexfields. You can capture and track the following award details: - Conflict of Interest - Flow-Through Funds - Intellectual Property - Previous Award

Award and Award Project Financial Details

You can specify the key financial attributes of an award using the Financial tab in the Edit Award Details page. Similarly, you can specify the key financial attributes of an award project using the Financial tab in the Manage Award Projects page.

This table describes some financial attributes of an award and award project:

Financial Attributes	Applies to	Description
Currency	Award and award project	The default currency of an award is the contract business unit currency. While creating an award, the Currency field is enabled only if the contract business unit is enabled for multicurrency.

Financial Attributes	Applies to	Description
Burden schedule and burden schedule overrides	Award and award project	The default burden schedule for an award comes from the award template, the sponsor, or the business unit implementation options. If needed, you can change the burden schedule that's assigned to an award. You can assign a different burden schedule to an award project and the top task of an award project, if needed. Optionally, at the award project level, you can create a burden schedule that's specific to the award project.
Preaward spending	Award	The preaward date tracks expenditures incurred even before the award is funded.
Expanded authority spending and restricted authority spending	Award	The expanded authority spending is allowed only if the award is authorized to spend across budget periods. You can't clear the Expanded authority check box if budget lines exist for the award project.
Budget periods	Award	A budget period represents the interval of time, usually twelve months, which the duration of an award is divided into for budgetary and funding purposes. For example, certain awards have a five-year duration divided into five budget periods.
Funding sources	Award	Funding sources are parties that fund an award. The external sponsor is the primary sponsor of an award. If an award is enabled for cost sharing, then internal sponsors can also fund the activity within the institution.
Organization credits	Award and award project	Organizations receive credits for an award and award project. The default organization for an award is the organization that's associated with an award. You can change or add organizations to an award and provide the credit percentage for each of them. It's important that the total organization credit percentage is 100.

Considerations for Creating or Updating Budget Periods

Here are a few points to keep in mind when creating or updating award budget periods:

- Ensure that budget periods for an award are within the award date range. The start date of the first budget period must align with the start date of an award or contract. If you change the award end date, you must also update the end date of the last budget period.

- Ensure that budget period names are unique and budget periods are contiguous. That means, budget period names must not overlap or have a gap.
- You can edit an award start or end date, preaward date, close date, or budget period dates, as long as there are no transactions that will fall outside of the changed dates.

Related Topics

- [Multicurrency for Awards and Award Projects](#)
- [Can I assign a project only to the internal funding source?](#)
- [Why can't I delete a project from an award or delete a funding source from an award project?](#)
- [Update Control Budget Dates with Award Dates for Sponsored Projects](#)

Award and Award Project Personnel Details

Award personnel can include both external and internal persons who are identified as the key members working on awards and award projects.

Person Type	Description
External	A contact of the customer sponsoring the award. The primary contact specified during the creation of the award becomes the default external person for the award.
Internal	Contacts from the grants personnel. Certain HCM personnel can also be defined as internal persons to work on awards and award projects. They must have an assigned department and job for their employment data in HCM. Select a principal investigator as the primary contact who's responsible for the work. One active principal investigator must exist for the award. Only one principal investigator per period.

You can specify the personnel attributes of an award using the Personnel tab in the Edit Award Details page. Similarly, you can specify the personnel details of an award project using the Personnel tab in the Manage Award Projects page.

To add an internal person to an award or award project, select a grant personnel and specify the following attributes:

Personnel Attributes	Description
Role	The role of the person.
Date range	The duration that the person is associated with the award or award project.
Credit percentage	The percentage of credit to be received by the internal person who's assigned to the award. Ensure that the total credit percentage of all persons is 100.
Email	The email address of the person.

Award and Award Project Compliance Details

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

You can specify the compliance attributes of an award using the Compliance tab in the Edit Award Details page. Similarly, you can specify the compliance details of an award project using the Compliance tab in the Manage Award Projects page.

This table describes the compliance attributes of an award and award project:

Compliance Attributes	Applies to	Description
Terms and conditions	Award	The written stipulations, specified by the grantor, that are indicated in an agreement or contract. The grantee is obligated to conform to the terms and conditions specified by the grantor. For example, confidentiality, intellectual property, publications, salaries, travel, and so on. To specify the terms and conditions for an award, select the category and name and then set the condition value.
Certifications	Award and award project	The regulatory requirements that institutions must be in compliance with if receiving the federal funding. For example, the use of nonhazardous equipment, provision of a smoke-free environment, and so on. To create a certification, select the certification details like name, certification date, sponsor who's requiring certification, and so on, and specify the following: • If the certification requires an expedited review or full review or none. • The assurance number to indicate compliance with regulations for protecting research subjects. If you're exempt from protocol approvals, provide the exemption number. You can assign the same certification name multiple times to an award or award project.

Multicurrency for Awards and Award Projects

Grants administrators and principal investigators can enable award projects for multicurrency where the award and award project currency is different from the award and award project ledger currency.

Use the Awards work area or the file-based data import process to create an award in a different currency other than the ledger currency. Some points to consider:

- While creating an award, if the business unit that you select is enabled for multicurrency, then you can select a currency for the award that's different from the award ledger currency. If the award is enabled for multicurrency, you must select a project template that has the same currency as the award currency.
- For sponsored projects, allocate the funding amount to the project in the award currency. If the project currency is different from the project ledger currency, then create control budgets using the project currency as control budget currency.
- If you can't select a currency while using the file-based data import process, then the application automatically uses the currency from the award template. If an award template isn't available, then the ledger currency of the contract business unit is used as the award currency.
- If multiple projects are associated with the award, all the projects must have the same currency as the award currency.
- While creating an award template, you can enable the Currency field as a field that can be edited if the business unit is enabled for multicurrency. If you assign a project template to the award template, both must have the same currency. You can change the currency in the template at any time. However, new awards created using the updated template inherit the new currency.

Use the Financial Performance tab in the award Overview page to view the financial details of an award in both award and award ledger currency. The financial details that you view in the award or project currency are:

- Funding amount
- Unbudgeted amount - The unbudgeted amount isn't displayed if you select to display amounts in the ledger currency.
- Financial details in the Project Control Budget Balances view
- Financial amounts in the Federal Financial Report

The financial details that you view in the award or project ledger currency are:

- Budget amount
- Actual amount
- Commitment amount
- Available amount
- Financial details in the Budget Lines, Planning Level view

Related Topics

- [Award Creation](#)

Award Review Validations

After you create and define an award, award projects, and award funding, you can validate certain aspects of the award to complete award definition so that costs can be captured and processed.

You must ensure that the award is complete and without any errors before you update the award. You can update the award contract and create contract lines only after the award is validated.

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

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

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

- Funding is allocated to an award or award project.

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

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

Review the errors and warnings for the award in the Validation Results region and fix the issues. Then, update the award contract to create the contract line and contract project linkages. After a contract line is created, you must update the contract only in Enterprise Contracts and not in Grants Management. After you create a Grants contract class award in Enterprise Contracts, you can't delete it. Also, once the contract is created for the award, you can't update the primary sponsor and currency.

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

Add Funding to an Award

Before you add funding to an award, ensure that the award has a sponsor and the budget periods are defined.

1. Click **Manage Awards** in the panel drawer.
2. Click the award you want to add funding to.
3. Click **Edit**.
4. In the Edit Award Details page, click the **Funding** train stop.
5. In the Manage Award Funding page, click **Add Funding**.
6. Select the budget period and funding source. If the award is set to cost sharing, then you can select the funding source to be either an internal or external funding source.
7. Select the issue type and enter the issue number and date.
8. Enter the direct and indirect funding amounts to be allocated to the award projects. Amounts are rounded using the half-up rounding rule to the standard precision for the currency if needed (1.125 rounds to 1.13 for USD).

9. Click **Save and Close**.

Tip: If your OTBI analysis includes rounded and unrounded values, use the ROUND function to improve accuracy. Use the ROUND() function and the SUM aggregation rule for a column if you want the line amounts and totals of the column to show the sum of the rounded amounts. While using the round function, define the decimal places as the standard precision defined for the concerned currency being reported.

Funding Graphs

After you add funding to an award, review the following graphs to understand the funding allocation for an award and its projects:

- Funding Summary
- Funding Amount by Funding Source
- Allocated Funding Amount by Funding Source
- Unallocated Funding Amount
- Project Funding Details - Select to view this graph for all projects or for a single project.

Considerations for Adding Direct and Indirect Amounts for an Award Project

Consider these points when adding direct and indirect amounts for an award project:

- If the award has only one project, the funding is automatically allocated to the award project and you can view the award project in the Project Funding Allocation region. If the award has more than one project, then add the project and allocate the amount.
- The total funding amount for an award can't be less than the award project budget amount.
- You can't decrease the funding amount at the issue level beyond the amount allocated to an award project.
- You can add a negative funding amount for the Supplement funding type, however, ensure that there's enough funding allocated to the award, projects, budget, and other award related entities. The application validates to ensure that the reduced amount isn't lesser than the existing allocated amount, based on existing spending rules such as expanded authority.

Suppose that there's a base funding amount of \$50,000 allocated to an award for a budget period. You can't decrease by more than \$50,000. Likewise, if \$20,000 of the \$50,000 is allocated to an award project or budgeted, you can't decrease the funding amount by more than \$30,000.

- Keep in mind these factors when you add a negative amount to an award:
 - If the award is in expanded authority, then the total funding across budget periods must be positive. The funding amounts within each budget period must be positive.
 - Check the decrease against your budgeted amount: the amount allocated to the award project.

Related Topics

- [Award Review Validations](#)
- [What's the difference between base and supplemental issues?](#)

Update Funding and the Related Contract

You can update the contract from the Award Funding page using the Update Contract button. A contract must be in the draft, under amendment, active, or expired status to update it with the funding amount changes.

A sponsor changed funding amounts and you want to record the changes.

1. Navigate to **Grants Management > Awards > Manage Awards**.
2. Find the award and click **Edit**.
3. Click the **Funding** train stop.
4. Update funding amounts and allocations for the external funding source.
5. Save the changes.
6. Click **Update Contract**.

The Update Contract UI displays one or more contract lines and their associated projects.

7. Enter your new contract line amount and the contract version description for one or more contract lines.
8. Update associated projects for the contract lines as needed.
9. Click **Save** for a draft contract or **Submit** for other contract statuses.

When you submit a contract that's active or expired, the contract is amended and submitted for approval. Contracts in Draft or Under Amendment status are updated and you can then choose to submit them for approval.

Assign Multiple Funding Sources to a Sponsored Project

Project application administrators can define funding sources.

Funding source can be either external customers defined as sponsors, or internal organizations, or user-defined. You can add the internal funding sources on the Manage Funding Sources page.

After you've created the award with basic details, you can assign multiple internal funding sources to an award and project following these steps:

1. In the award Overview page, click **Edit** to open the Edit Award Details page.
2. Click the **Financial** tab.
3. Verify that the **Cost shared by internal sources** check box is selected, and in the **Internal Funding Sources** region click New to add one or more internal funding sources.
4. Click the **Projects** train stop.
5. In the Manage Award Projects page, select the sponsored project to which you want to assign the internal funding sources that you created.
6. Click the **Funding** train stop.
7. In the Manage Award Funding page, click **Add Funding**.
8. In the Add funding dialog box, add the funding amount to the funding sources as required, allocate the funding to projects, and click **Save and Close**.
9. Click the **Review** train stop.
10. In the Review Award page, click **Submit Contract** to submit the contract.

Multiple Awards and Funding Sources for a Sponsored Project

Grants administrators and principal investigators can associate a sponsored project to multiple awards or to multiple funding sources within an award.

For a sponsored project that's associated with multiple awards and funding sources, you can:

- Create a budget and a control budget for an award and a funding source.
- Create and control costs for the specific award and funding source.
- Generate bills for external funding sources.
- Report cost and budget based on the funding sources.
- Optionally, apply burden costs to the raw costs for the internal funding sources.
- Automatically split costs among funding sources using funding patterns.

FAQs for Award Details

How can I set up a home page of my preference in the Awards work area?

Follow these steps:

1. Open the **Settings and Actions** menu and click **Set Preferences**.
2. Click **Project and Grants Management Preferences**.
3. In the **Awards** section, select Award Overview or Manage Awards from the **Home Page** drop-down list.

The next time you navigate to the Awards work area, the selected home page is displayed.

Why can't I delete tasks or update project dates for a sponsored project?

You can't delete tasks if transactions exist for the sponsored project. Also, you can't update the project dates for a sponsored project if transactions exist outside the project dates.

FAQs for Award Dates

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

The award end date is the date on which the award comes to an end.

The award close date is derived by adding the number of days in the **Days to Close** business implementation option to the award end date. Suppose that the **Days to Close** value is 90 days and the award end date is 31-Dec-2025, then the award close date is 31-Mar-2026. Expenditures can be recorded and controlled until the award close date, if the close date is available. If you don't want to record expenditures after the award end date, then remove the close date.

What transactions are considered if I edit the award start or end date, preaward date, close date, or budget period dates ?

If you postpone a start date or preaward date and advance an end date or close date, transactions must be within the revised date and period boundaries.

If you edit an award start or end date, preaward date, close date, or budget period dates, the dates will be changed if:

- No transaction exists after the award end date if a close date isn't available or if a close date is available then no transaction exists after the close date.
- No transaction exists before the award start date if a preaward date isn't available or if a preaward date is available then no transaction exists before the preaward date.
- The transactions fall within the budget period dates if you edit any budget period date.
- If using Budgetary Controls, any transaction for the award and project for which funds are reserved where the control budget date is within the award dates.

The listed rules apply to these transactions:

- Any project expenditure that has the expenditure item date within the award dates.
- Any project unprocessed cost that has the expenditure item date within the award dates.
- Any commitment transaction such as Requisitions, Purchase Orders, Invoices, or other project-related transactions such as Time cards, Expense Reports, Spend Authorizations, Transfer Orders, Work Orders, Sales Orders, and Miscellaneous Inventory Issues, that aren't yet approved where the expenditure item date is within the award dates.

FAQs for Funding

What's cost share?

Costs that are shared by internal departments or third-party contributions to help a sponsored project.

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

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

Can I assign a project only to the internal funding source?

Yes, for awards that are enabled for cost sharing, you can assign a project only to an internal funding source.

If you select a project or project template that's associated with a billable project type, but the project is assigned only to an internal funding source, then the cost transactions for the internal funding source are set to nonbillable. Also, projects that are assigned to an internal funding source aren't assigned to a contract.

What's the difference between base and supplemental issues?

When you add funding for a budget period and funding source, you specify the issue type based on funding reasons. The funding source initially allocates some funding for the original issue in a budget period and this is called the base issue.

The later funding for the same budget period are the supplemental issues.

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

Why can't I delete a project from an award or delete a funding source from an award project?

You can't delete a project from an award or a funding source from an award project if expenditure items or commitments exist for the award, project, and funding source.

Related Topics

- [Award and Award Project Financial Details](#)

FAQs for Contracts

What happens if the award contract numbering is automatic?

When the contract numbering is automatic, you can't enter the award number because the contract number is taken as the award number.

If the contract numbering is manual, then you can enter the award number and the same number is taken as the contract number. Define the contract numbering method in the Manage Contract Types page in Enterprise Contracts.

What happens when you submit a contract?

The award is validated and then you're provided with options to update and submit the contract for approval.

- If there are errors from the award validations, review the error messages and resolve them. Then, click **Submit Contract** on the Review Award page.
- If the award is successfully validated, then if needed, update the contract line name or the bill plan details of the associated contract, and click **OK** on the Update Contract dialog box.
- If the contract can't be updated due to errors, review and resolve the errors and then click **Submit Contract** on the Review Award page.
- If the contract is updated successfully, then click **OK** to validate and submit the contract for approval. If there are errors from the contract validations, then review and resolve the errors in the Contracts work area and then submit the contract for approval from the Contracts work area. If you don't select to submit the contract for approval, then you can do it later from the Contracts work area.

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

You can't update contract details in Oracle Fusion Grants Management. Use Oracle Fusion Enterprise Contracts to update contract details.

What's the contract status of an active award?

Under amendment or active.

How are bill plan attributes populated in the Update Contract window?

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

The bill plan attributes include the following:

- invoice and revenue methods
- billing cycle
- transaction type
- generated invoice
- status
- billing site and contact number
- bill set number
- payment terms
- labor format
- nonlabor format
- event format
- net invoice
- invoice grouping options
- transaction type
- generated invoice status
- LOC document number

You can change the invoice and revenue methods by amending the contract. The sponsor account designated as primary becomes the bill-to account. You can change it to a different bill-to account.

Use the Manage Customers setup page to define the bill-to account and contact attributes. If a primary contact exists at the site level, then that contact is displayed as the bill to contact. Otherwise, the primary contact at the account level is displayed as the bill to contact.

4 Award Distribution

Project Cost Distribution Using Award Funding Patterns

Funding patterns provide a rules-based instrument to derive the award and funding source for a cost, and optionally to check the control budget for available funds.

Projects sponsored by public and private entities have contractual requirements defining how the funds are to be spent. Some are more specific than others. When a project is sponsored by multiple funding sources, ensuring the requirements are met can be complicated during cost capture.

Distribution sets in funding patterns provide the ability to set an order of precedence for a set of rules. Distribution rules define cost distribution percentages for award and funding sources. Consuming applications such as accounts payable and procurement, and third-party integrations, apply the funding patterns to receive distributed costs based on the project, task, and expenditure item date of the cost.

The action Distribute Project Costs is available across the procure-to-pay lifecycle (requisitions, purchase orders, accounts payable invoices) when you have active funding patterns. On accounts payable invoices, the action is automatic when distributing the invoice line. When you create requisitions or purchase orders, you can use the action to distribute costs manually. Or, if you submit your requisition or PO, funding patterns are applied if the contract/award and funding source aren't provided.

Active funding patterns can be applied to sponsored costs in the Manage Unprocessed Costs screen and to imported third-party costs. You can use the Test Award Distribution button to see the potential cost distribution and if there are any errors. Correct your funding patterns and you can retest and import costs when you're confident they will be successfully distributed.

Related Topics

- [Award Funding Pattern Example](#)
- [Create an Award Funding Pattern](#)

Create an Award Funding Pattern

To automatically distribute costs, you can define funding patterns for a project, expenditure item date range, and optionally at any task level.

If a project has multiple funding patterns for the same date range, costs that fit into that date range are applied to the funding patterns in this order:

1. Lowest task
2. Summary task continuing to the highest task
3. Project level

Funding patterns have two more components: distribution sets and distribution rules. Distribution sets in a funding pattern provide a sequence of distribution rules to flow through. For each set, rules define the percentages used to split costs to the awards and funding sources. The sets of distribution rules must total 100 percent to fully distribute the original cost.

Before you start

A Grants Administrator, Grants Department Administrator, or Principal Investigator can create an award funding pattern.

Here's what to do

1. Navigate to **Manage Funding Patterns** in the Actions panel tab of the Awards work area.
2. Click **Create**.
3. Choose a project.
The start and end dates default to the project dates.
4. The task number is the level of the hierarchy for the funding pattern.
5. Select **Perform funds check** to indicate the funding pattern will use the control budget to check for available funds for a cost being distributed. If selected, you can also select the following:
 - a. Select **Treat advisory as absolute** to indicate that spending that's specific to an award and funding source continues in an advisory manner, while ensuring that when the funding pattern is used to distribute a cost, it will treat advisory as if it was an absolute control level.
 - b. Select **Prorate across distribution sets** to consume as much money as is available in the control budget and distribute the remaining amount to the subsequent distribution set or sets allowing for all the budgeted funds to be consumed in each set.
6. Click **Create**.
The project appears with your draft funding pattern.
7. In the Distribution Sets region click **Create Set**.
8. Enter a number for the precedence for this set. The number 1 means it will be considered first when allocating costs.
9. Click **Create**.
10. In the Distribution Rules region, click **Create Rule**.
11. Select the award and funding source. Enter 100 percent if there's no split with another funding source. If there's a split, enter the correct percentage.
12. Click **Create**.
13. Create more rules and distribution sets as needed.

Award Funding Pattern Example

This example shows a funding pattern that will automatically distribute costs for a project among several awards and funding sources.

This funding pattern ensures that the construction requirements of the awards are being met. The project has other requirements that are met using other funding patterns.

Your city plans to replace a bridge. The city is the sponsored program office and internal funding source. Besides city budgeted funds, awards have been granted from these sources:

- The state
State funds are available until the end of their fiscal year, in 6 months .
- Federal transportation agency
- State transportation agency
Requires cost sharing of 25%.

Here's the funding pattern for construction requirements and associated distribution sets and distribution rules:

Bridge Construction Funding Pattern

Field	Value
Project Number	16720
Project Name	City Bridge
Funding Pattern Name	Bridge Construction
Status	Active
Task Number If the task isn't provided, the funding pattern is for all tasks on the project that don't have a defined funding pattern.	2
Start Date	July 1
End Date	March 31

Distribution Set 1

Set Name	Description	Precedence
Construction Set 1	Spend state money first	1

Set 1 Rule

Rule Number	Award Number	Funding Source	Percentage
1	state bridge	State	100

Distribution Set 2

Set Name	Description	Precedence
Construction Set 2	Meets contract obligations for state and federal transportation	2

Set 2 Rules

Rule Number	Award Number	Funding Source	Percentage
1	State Trans	State Transportation	50
2	State Trans	Internal	25
3	Federal Trans	Federal Transportation	25

Rule number 2 is an example of state cost sharing requirements.

5 Award Burdening

Enable Burdening for Internal Funding Sources

Enable or disable burdening for internal funding sources, even if the award, award project, or funding source is budgeted or has transactions. If an award project is enabled for burdening, you can specify whether you want to apply burden costs to raw costs for internal funding sources

1. On the Manage Award Projects page, expand the award project.
2. Click the **Financial** tab.
3. Select or deselect the **Enable Burdening** check box in the **Indicate Burden for Internal Funding Sources** region.

If you enable burdening, you may need to manually recalculate existing budget lines, costs, or other project-related transactions.

For a project enabled to generate burden costs on the same line, you can perform the Recalculate Raw Cost adjustment type, which will automatically reverse the previous burden cost too. For a project enabled to generate burden costs on separate lines, you must reverse the previously generated burden costs manually.

Some things to consider if you disable previously enabled burdening:

- Any existing burden cost must be manually reversed. You can manually reverse burden costs using a new miscellaneous cost transaction or a cost imported from a third party source.
- You can't perform the Recalculate Burden Cost adjustment on costs.
- If you recalculate burden costs in the Manage Burden Schedules page after disabling, the View Burden Costs page displays a burden cost even though no burden cost is generated going forward. Also, the output report of the Generate Burden Costs process shows the burden cost even though no burden cost is actually generated.

Related Topics

- [Considerations for Burden Cost Options for Project Types](#)

View Burden Schedules

Burden schedules are associated with awards and award projects.

To view the details of the burden schedule that's assigned to an award:

1. On the Edit Award Details page, click the **Financial** tab.
2. Click the **View Burden Schedule** icon.

You can assign a different burden schedule to the award project and the top task of the award project, if needed.

To view the details of the burden schedule that's assigned to an award project:

1. On the Manage Award Projects page, expand the award project.
2. Click the **Financial** tab.
3. Click the **View Burden Schedule** icon.

Create Override Burden Schedules

Optionally, at the award project level, you can create a burden schedule specific to the award project. If no burden schedule is assigned to the award project, then the award burden schedule is applied to the award project.

To create an override burden schedule:

1. On the Manage Award Projects page, expand the award project.
2. Click the **Financial** tab.
3. Click the **Create Override Burden Schedule** icon.
4. On the Manage Override Burden Schedule page, complete the fields as appropriate. For example, you can add a multiplier or change the burden structure for the desired burden schedule version.

Note: Most of the burden schedule information is copied from the burden schedule that's currently assigned to the award project. If no burden schedule is assigned to the award project, then the information is copied from the burden schedule that's assigned to the award. Burden schedule information is copied if the burden structure is valid for the current date and there's a valid burden schedule version for the award start date. If the burden structure has ended, none of the details are copied.

5. Click **Build Burden Schedule** to use the burden rate that you defined for the award project.
6. Click **Save and Close**.

FAQs for Award Burdening

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

The default burden schedule comes from either the sponsor, grants business unit implementation options, or the award template. If needed, you can change the burden schedule on an award.

While creating an award from an award template, the burden schedule on the award template is defaulted to the award. If an award template isn't used to create the award, then the burden schedule comes from the sponsor or from grants business unit implementation options, in that order if the burden schedule is available on those objects. If needed, you can change the burden schedule on an award.

What's the precedence in which the Create Burden process checks the burden schedule to calculate burdening?

The Create Burden process calculates burdening in this order:

1. The burden schedule that's assigned to the award project top task.
2. If no burden schedule is assigned to the award project top task, then it checks for the award project override burden schedule.

3. If no override burden schedule is assigned to the award project, then it checks for the award project burden schedule.
4. If no burden schedule is assigned to the award project, then it checks for the award burden schedule.

6 Award Performance

Award Performance Overview

Grants administrators and principal investigators can review information about awards and award projects on the Manage Awards page.

They can review awards and award projects that are overspending or underspending and their respective financial information, such as budget amount, committed cost, and actual cost.

You can review important dates such as projects ending within the next seven days.

Review the awards on the Manage Awards page to determine the number of active awards and their projects. Determine how many projects are overspending or underspending.

Tip: If the award that you want to review doesn't appear in the Awards table, click the **Show Filters** option to search for the award. The saved search displays the 20 most recent awards by default. Click the Show Filters option to view personalized options.

Related Topics

- [What's the overspent amount for an award?](#)
- [What's projected spend percentage?](#)
- [Award Creation](#)
- [Award and Award Project Validations](#)
- [Award Review Validations](#)

Managing Awards and Award Projects

Grants administrators and principal investigators can review information about awards and award projects that are overspending or underspending and their respective financial information, such as budget amount, committed cost, and actual cost.

Tip: If the award that you want to review doesn't appear in the Awards table, click the **Show Filters** option to search for the award. The saved search displays the 20 most recent awards by default. Click the Show Filters option to view personalized options.

Related Topics

- [What's the overspent amount for an award?](#)
- [What's projected spend percentage?](#)
- [Award and Award Project Validations](#)
- [Award Review Validations](#)

Important Date Categories

Some key dates in managing an award are tracked in the Awards work area and award Overview pages. For example, if an award or award project is ending in a week, it's indicated with an icon followed by the details.

You can update the end date or take other actions before the award ends.

Date Categories

Specify the categories for important dates in the Awards work area and track the important dates for your awards. The following table describes the date categories for an award.

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

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

Federal Financial Report

This topic provides an overview of the Federal Financial Report.

Overview

The Federal Financial Report provides the award financial information in a standard layout defined by the federal agency. Use this report to track the summary transactions for an award, the amount spent or received, and the outstanding obligation amount.

Key Insights

This report answers the following business questions:

- What's the cumulative amount of actual cash received that you must report to the federal agency?
- What's the cumulative amount of federal fund disbursements that you must report to the federal agency?
- What's the total funds authorized, total expenditures, and total unliquidated obligation that you must report to the federal agency?

Frequently Asked Questions

The following table lists the frequently asked questions about this report.

FAQ	Answer
How do I find this report?	Report and Analytics - Shared Folders - Projects - Grants Management - Award
How do I generate this report?	Submit the Federal Financial Report process.
Who uses this report?	Grants Administrator
When do I use this report?	When you want to view and print award financial information in the standard federal format.
What can I do with this report?	View the following information and print the report. • Federal agency details • Recipient details • Project or grant period • Transactions: ○ Federal cash amount ○ Federal expenditures and unobligated balance ○ Recipient share ○ Program income
What type of report is this?	Oracle Analytics Publisher

Process Parameters for the Report

You can run the Federal Financial Report process for a single award or multiple awards within or across business units.

Note: The principal investigator can't generate the federal financial report.

The Federal Financial Report process accepts the following parameters:

Parameter	Description
* Generate Report	Specifies to submit the process for a single award or multiple awards.
* Business Unit	Name of the business unit.
* Award Name	Name of the award. Note: Not required when you process multiple awards.
Sponsor	Name of the sponsor. Note: Required when you process multiple awards. When the award uses a letter of credit, the LOC number is displayed. The sponsor award number and document number are listed in the Federal Grant Number field when you process single or multiple awards, respectively.
Institution	Name of the business unit. Note: Required only when you process multiple awards.
* Certifying Official	Authorized person who signs on the federal financial report when submitting it to the federal agency.
* Report Date	Date when the report is generated and submitted to the federal agency. The default value is the current date.
* Period End Date	End date of the reporting period. For example, 31 March is the end date for the quarterly report.
* Report Type	Type of report. Valid values are Annual, Semi-Annual, Quarterly, or Final.
Basis of Accounting	Values are Accrual or Cash. The default value is selected from the primary ledger.
Total Recipient Share Required	Total required recipient share of costs within the Federal Financial Report report period end date. Note: Required only when you process a single award.
Total Federal Program Income	Amount of federal program income earned. Note: Required only when you process a single award.

Parameter	Description
Program Income Expended in Accordance with the Deduction Alternative	Amount of program income that was used to reduce the federal share of the total project costs. Note: Required only when you process a single award.
Program Income Expended in Accordance with the Addition Alternative	Amount of program income that was added to the funds committed to the total project costs and expended to further eligible projects or program activities. Note: Required only when you process a single award.
Comments	Any explanations or information that's required by the federal sponsoring agency.

Output Report

The Federal Financial Report output report prints the following details:

Section in the Report	Field Name	Description
1	Federal Agency and Organizational Element to Which Report is Submitted	Name of the primary sponsor of the award. Only awards with federal sponsors are applicable for Federal Financial Report generation.
2	Federal Grant or Other Identifying Number Assigned by Federal Agency	Award number that's tracked by the sponsor. The award number is displayed in the Sponsor Award Number field, in the General tab in the Edit Award Details page.
3	Recipient Organization (Name, Street 1, Street 2, City, State, County, Country, Province, Postal Code)	Name and address (the primary address that you entered in the Manage Institutions page) of the award institution. The award institution is displayed in the Institution field in the General tab in the Edit Award Details page.
4a	Unique Entity ID	The identifier of the institution that's used in the report. The unique entity ID appears in the Unique Entity Identifier field in the Create Institution and Manage Institutions pages in Setup and Maintenance.
4b	EIN	Unique identification number of the employer that's assigned by the Internal Revenue Service (IRS) for tax and accounting purposes.

Section in the Report	Field Name	Description
		This value is populated from the legal entity that's associated with the award organization.
5	Recipient Account Number or Identifying Number	Award or contract number of the award for which the report is generated.
6	Report Type	Type of Federal Financial Report. Valid values are Annual, Final, Quarterly, and Semiannual. The report type is the Report Type parameter value that you specified when you submitted the Generate Federal Financial Report process.
7	Basis of Accounting	Accounting method of the primary ledger of the award organization. The accounting method is displayed in the Accounting Method field of the primary ledger of the award organization in the Manage Primary Ledgers page in the Setup and Maintenance work area.
8	Project/Grant Period	Start and end date of the award for which the report is generated. The start and end dates are displayed in the Start Date and End Date fields in the Edit Award Details page.
9	Report period end date	Date up to which the report amounts are calculated. The default value is the current date. The report period end date is the Report Date parameter value that you specified when you submitted the Generate Federal Financial Report process.
10	Transactions	Displays the cumulative amounts of expenditures with accounted dates within the inception of the award through the Federal Financial Report report period end date.
10a	Cash Receipts	Sum of the applied (receipts matched against the invoice) and accounted receipt amounts with the accounting date from inception till the Federal Financial Report report period end date. Go to Receivables, click Manage Receipts, and search for receipts that have an invoice mapped and accounting date that's less than the Federal Financial Report report period end date.

Section in the Report	Field Name	Description
10b	Cash Disbursements	Sum of all accounted burdened cost incurred by the sponsor (external funding source) with the provider ledger accounting date that's within the Federal Financial Report report period end date. Go to Projects > Costs, and click Manage Project Costs in the panel drawer. Search for costs that match the contract and funding source as the sponsor and with an accounting period that's within the Federal Financial Report report period end date.
10c	Cash on Hand	Difference between cash receipts (10a) and cash disbursements (10b).
10d	Total Federal funds authorized	Sum of all direct and indirect funding from the sponsor (federal funds) that's allocated to budget periods within the Federal Financial Report report period end date.
10e	Federal share of expenditures	Sum of all accounted burdened cost incurred by the sponsor (external funding source) with provider ledger accounting date that's within the Federal Financial Report report period end date. Go to Projects > Costs, and click Manage Project Costs in the panel drawer. Search for costs that match the contract and funding source as the sponsor and with an accounting period that's within the Federal Financial Report report period end date.
10f	Federal share of unliquidated obligations	Sum of burdened costs from commitment transactions with provider ledger accounting date that's within the Federal Financial Report report period end date. Only purchase orders and supplier invoices are picked from commitments. Requisitions and third party commitments aren't considered. Go to Projects > Costs, and click Manage Committed Costs in the panel drawer. Search for costs that match the contract and with an accounting period that's within the Federal Financial Report report period end date.
10g	Total Federal share	Sum of federal share of expenditures (10e) and federal share of unliquidated obligations (10f).
10h	Unobligated balance of Federal Funds	Difference between the total federal funds authorized (10d) and total federal share (10g).

Section in the Report	Field Name	Description
10i	Total receipt share required	Total required recipient share of costs within the Federal Financial Report report period end date. The total recipient share required is the Total Recipient Share Required parameter value that you specified when you submitted the Generate Federal Financial Report process.
10j	Recipient share of expenditures	Sum of all accounted burdened cost incurred by the internal funding sources with provider ledger accounting date that's within the Federal Financial Report report period end date. Go to Projects > Costs, and click Manage Project Costs in the panel drawer. Search for costs that match the contract and funding source as internal or organization and with an accounting period that's within the Federal Financial Report report period end date.
10k	Remaining receipt share to be provided	Difference between the total receipt share required (10i) and recipient share of expenditures (10j).
10l	Total Federal program income earned	Amount of federal program income earned. The total federal program income earned is the Total Federal Program Income parameter value that you specified when you submitted the Generate Federal Financial Report process.
10m	Program Income expended in accordance with the deduction alternative	Amount of program income that was used to reduce the federal share of the total project costs. The program income expended in accordance with the deduction alternative is the Program Income Expended in Accordance with the Deduction Alternative parameter value that you specified when you submitted the Generate Federal Financial Report process.
10n	Program Income expended in accordance with the addition alternative	Amount of program income that was added to the funds committed to the total project costs and expended to further eligible projects or program activities. The program income expended in accordance with the addition alternative is the Program Income Expended in Accordance with the Addition Alternative parameter value that you specified when you submitted the Generate Federal Financial Report process.

Section in the Report	Field Name	Description
10o	Unexpended program income	Difference between the total federal program income earned (10l) and either the program income expended in accordance with the deduction alternative (10m) or the program income expended in accordance with the addition alternative (10n); based on which field has a value.
11	Indirect Expense	Displays the burden schedule version details that the expenditure items, dated until the report period end date, use to create the indirect expense amounts. Note: Burden costs are calculated using the project raw cost and the burden schedule multiplier. This section reports data only if the burden is calculated by the service. For converted costs, if the burden is loaded as miscellaneous costs, these are not reported in the Indirect Cost section. If the burden is loaded as miscellaneous costs, you can, however, change the query of the Federal Financial Report output report manually to include the imported burden costs for the converted costs.
11a	Type	Type of the burden schedule version that's used for calculating the burden rates for the expenditure items.
11b	Rate	Overall rate of costs under the burden schedule that's calculated using the following formula: $(\text{Total burden cost} / \text{Total raw cost}) \times 100$.
11c	Period From, Period To	Start and end dates of the burden schedule version for indirect expenses.
11d	Base	Total raw cost of all the costs that were created before the report period end date using the burden schedule, and that belong to the award and funding source (sponsor) for this report.
11e	Amount Charged	Total burden cost of all the costs that were created before the report period end date using the burden schedule, and that belong to the award and funding source (sponsor) for this report. Burden cost is calculated for each eligible transaction by multiplying the project raw cost with the applicable burden multipliers defined

Section in the Report	Field Name	Description
		in the burden schedule and then summing up all the calculated burden costs.
11f	Federal Share	The federal share value is populated from the Amount Charged (11e) field.
11g	Totals	Total of each of the indirect expense column value.
12	Remarks	Any explanations or information that's required by the federal sponsoring agency. The remarks are from the Comments parameter value that you specified when you submitted the Generate Federal Financial Report process.
13	Certification	Displays the certification details.
13a	Name and Title of Authorized Certifying Official	Details of the person that you specified in the Certifying Official parameter when you submitted the Generate Federal Financial Report process.
13b	Signature of Authorized Certifying Official	Not populated during the Federal Financial Report generation.
13c	Telephone(Area code, number and extension)	Contact details of the person that you specified in the Certifying Official parameter when you submitted the Generate Federal Financial Report process.
13d	Email Address	Email address of the person that you specified in the Certifying Official parameter when you submitted the Generate Federal Financial Report process.
13e	Date Report Submitted	Date that's populated from the Report Date parameter value that you specified when you submitted the Generate Federal Financial Report process. The default value is the current date.

Indirect Expense Calculation in the Federal Financial Report

The Base, Amount Charged, and Rate values that you view in the Indirect Expenses section of the Federal Financial Report are calculated using formulas based on the dates of the report.

The formulas use the following setup objects:

- Burden Structures
- Burden Cost Codes
- Burden Schedules

Example of Calculating Indirect Expenses and Populating them in the Federal Financial Report

This example explains how indirect expenses are calculated and populated in the Federal Financial Report output report for the **FFR Bonus Salary Award**.

In this example, here's how the burden structure is setup in the Manage Burden Structures page:

Field	Value	Value
Name	Bonus Salary Structure	None
Structure Type	Precedence	None
From Date	01/01/01	None
Cost Base	Labor	None
Cost Base Type	Burden Cost	None
Burden Cost Code	Fringe	Labor Costing
Precedence	1	2
Expenditure Type	Administration	Professional
Description	Administration	Professional
Direct Cost	Y	N
Note: The direct cost value is specified in the Manage Burden Cost Codes setup page.		

The budget schedule versions are set up in the Manage Burden Schedules setup page, as follows:

Field	Value	Value	Value	Value
Version	2021-and-After	Jul-Dec2020	Jan-Jun2020	Before2020
From Date	01/01/21	07/01/20	01/01/20	01/01/01
To Date	None	12/31/20	6/30/20	12/31/19
Type	Firm	Firm	Firm	Firm
Burden Structure	Bonus Salary Structure	Bonus Salary Structure	Bonus Salary Structure	Bonus Salary Structure

The multipliers to the burden schedule versions are set up as follows:

- For Before2020 burden schedule version:

Field	Value
Organization	Vision City Operations
Burden Cost Code	Labor Costing
Multiplier	0.5

- For Jan-Jun2020 burden schedule version:

Field	Value	Value
Organization	Vision City Operations	Vision City Operations
Burden Cost Code	Labor Costing	Fringe
Multiplier	0.5	0.2

- For Jul-Dec2020 burden schedule version:

Field	Value	Value
Organization	Vision City Operations	Vision City Operations

Field	Value	Value
Burden Cost Code	Labor Costing	Fringe
Multiplier	0.52	0.2

- For 2021-and-After burden schedule version:

Field	Value
Organization	Vision City Operations
Burden Cost Code	Labor Costing
Multiplier	0.5

The FFR Bonus Salary Award award is created with the following values:

Award and Award Project Attributes	Value
Award Number	FFR_BONUS_SALARY_AWARD
Start Date	10/01/17
End Date	9/30/22
Primary Sponsor	Department of Health and Human Services (DHHS)
Business Unit	Vision City Operations
Legal Entity	Vision City LE
Institution	Stephen University
Burden Schedule	FFR Burden Schedules
Project Name	FFR Salary Project
Project Number	FFR_Salary_Project

Award and Award Project Attributes	Value
Funding Source	Department of Health and Human Services (DHHS)
Start Date Note: Start date of the award project.	10/01/17
End Date Note: End date of the award project.	9/30/22
Burden Schedule Overrides	None

The Federal Financial Report process for the FFR Bonus Salary Award award is submitted with the following parameters:

Parameter	Value
Business Unit	Vision City Operations
Award Name	FFR Bonus Salary Award
Report Type	Annual
Certifying Official	Mike Phillips
Report Date	8/12/20
Period End Date	8/12/20

Two payroll costs are defined for the Jan-Jun2020 and Jul-Dec2020 burden schedule versions with the following values:

Payroll Cost Attributes	Value	Value
Transaction Number	7914796	7914799
Expenditure Item Date	01/01/20	07/01/20
Expenditure Type	Administration	Administration

Payroll Cost Attributes	Value	Value
Raw Cost	\$100.00	\$100.00
Burdened Cost	\$100.00	\$100.00
Expenditure Organization	Vision City Operations	Vision City Operations
Project Number	FFR_Salary_Project	FFR_Salary_Project
Task Number	1.1	1.1
Contract Name	FFR Bonus Salary Award	FFR Bonus Salary Award
Funding Source	Department of Health and Human Services (DHHS)	Department of Health and Human Services (DHHS)
Person Name	Parker, Alice	Parker, Alice

These two payroll costs are used to calculate the indirect expenses. The indirect expenses are calculated and populated in the Federal Financial Report output report as follows:

Type	Rate	Period From	Period To	Base	Amount Charged	Federal Share
Final	50	01/01/20	06/30/20	\$120.00	\$60.00	\$60.00
Final	52	07/01/20	12/31/20	\$120.00	\$62.40	\$62.40

The Base, Amount Charged and Rate are derived for the costs using the Jan-Jun2020 burden schedule version, as follows:

- The Base value of \$120.00 is derived, as follows. As fringe is considered as direct cost, the transaction raw cost (100) is multiplied with the multiplier of fringe (0.2).

$$\text{SUM}(100 + (100 \times 0.2))$$

- The Amount Charged value of \$60.00 is derived as follows:

$$\text{SUM}((100 + (100 \times 0.2)) \times 0.5)$$

- The Rate value of 50 is derived as follows:

$$(60 / 120) \times 100$$

Related Topics

- [How Burden Costs Are Calculated](#)
- [How Burden Structure Components Work Together](#)
- [How Burden Schedule Components Work Together](#)

FAQs for the Federal Financial Report

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

The costs that result by using a burden cost code, which is set to report as direct cost in the Federal Financial Report, aren't included as burden expenditure item costs.

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

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

Specify the burden cost code to report the cost as a direct cost in the Manage Burden Cost Codes page.

This burden cost is reported as a direct cost in the Federal Financial Report in Oracle Fusion Grants Management. However, this is stored as a burden cost in all other pages of the application.

FAQs for Award Performance

Where does the award project data in the graphs that appear on the Award Overview page come from?

Based on the actual burn rate percentage, the graphs on the Overview page in the Awards work area display award project data in the following order:

- Overspending projects
- Underspending projects
- On track projects

You set the burn rate thresholds when you define the grants business unit implementation options. The award project data isn't sorted by the overspent amount value.

How do I determine the overspending and underspending limits?

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

What are the project spending statuses?

The following table describes the spending status of an award project. The status indicates whether an award project is underspending, overspending, or on track:

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

What's projected spend percentage?

The projected spend burn rate is the amount currently spent, and what it will be when projected out for the remaining duration of the award.

The following images describe the formula used to calculate projected spend percentage and the legend that contains descriptions of the values used in the formula.

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

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

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

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

What's the overspent amount for an award?

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

The following image describes the formula used to calculate overspent amount.

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

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

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

You can't view the financial details of an award in the following scenarios:

- If a project isn't associated to the award
- If budget periods aren't defined for the award
- If the Update Award Performance Data process isn't run and award data isn't yet summarized by budget period

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

Which budget version is used for reporting financial information?

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

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

What's the breakdown of funds consumed?

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

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

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

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

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

