The Controller’s Office, Office of Sponsored Projects (OSP) and University Computing Services (UCS) have been working together over the past several months on enhancements to the PeopleSoft Grants Module, with the goal of providing the Research community more accessible and actionable financial grant data.

We are grateful to all who worked hard to put this new functionality in place.

These enhancements, described below, include the Grants Portal, Cost Share Reporting, Milestone Notifications and Grant Close-Out Process.

These new enhancements will be reflected in PeopleSoft beginning Monday, August 26, 2013 (“go-live”).

Thank you in advance for utilizing these features. Please provide us feedback (good and bad) so that we may continue to make improvements.

Send your issues, suggestions and comments to: scaaccounts@etal.uri.edu.

Below is a walk-through of what to expect from these enhancements and how we anticipate your use, followed by FAQs.
What to expect…

Grants Portal

Grants Portal is brand new PeopleSoft functionality and consequently, some features have not been made available at this time.

However, you will have access to the Award and Project pages in the portal, which will be helpful with milestone notifications (see below).

Only the pilot group will have access initially to the Budget page, which is where the financial data is shown.

The portal will be piloted by the College of Environmental Life Sciences (CELS) beginning mid-September 2013 and rolled out to the remaining colleges through early 2014 (roll-out schedule dependent upon pilot stage and will be communicated mid-Fall).

The Grants Portal provides several key benefits. Grant data can be viewed at the award and project level and financial data can be downloaded directly to excel. Cost share, historically very cumbersome to calculate and track, is now visible to the Research Community via the portal. Cost share budgets and expenditures are presented at the award and project level. Types of cost share in the portal include waived F&A and third party expenditures.

The data source for the portal is the University general ledger which is the ledger used for financial reporting. It is not commitment control, which is the ledger for budget checking. The general ledger is the source for all award financial reporting and invoicing.

How we anticipate your use of this functionality at this time:

- Monitoring all award and project actual expenditures (rather than commitment control);
- Monitoring all forms of cost share (not easily done today)

Below are a few screen shots of what you can expect to see in the grants portal:
Please note:

- **Data is updated once a day, at night.** Consequently the data will remain the same all day.

- **There are no payroll encumbrances in the grants portal at this time.** We anticipate addressing payroll and related encumbrances in a future project.

- **Budget categories do not match commitment control** at this time. Consequently you will still need to refer to commitment control if reviewing budget checking errors or issues. We anticipate addressing the budget categories in the FY2014 Pre-Award project.

- There are many links in the portal to other parts of the grants module (for example, award attachment). **The links will not be available** with this initial portal implementation. We anticipate making links available with future Grants Portal enhancements.

- **Dean’s pledges will not be in grants portal at this time.** We anticipate addressing Dean’s Pledges in the FY2014 Pre-Award project.

**Milestone Notifications**

Milestones in PeopleSoft Grants are used to track events in the life cycle of the award.

Milestones represent points during the award process that are important to mark for reporting purposes or use as reminders or alerts. Milestones are specific to an award (not project).

Milestone notifications typically take the form of emails to pre-designated recipients and will replace certain manual emails (for example, 90 day closeout email).

Certain email notifications provide links to the Grants Portal.

**How we anticipate your use of this functionality:**

- You will receive system generated emails that will either provide a list of steps you need to address (example: 90 day closeout email will ask if a no cost extension has been requested from the sponsor, etc.) or will provide a simple notification (example: award has ended)
Below is an example of an email notification:

![Email Notification Example](image)

Please note:

- Milestones are established at the AWARD (not project level). Consequently email notifications will reference the award in the email subject line.

- Certain email notifications will include a link to the grants portal (last hyperlink in the email above). For those in the Grants Portal pilot, the link will work. However, the link will not work for those users not part of the pilot. The links will work as the portal is rolled out.

**Grant Close-Outs**

A critical stage in a grant’s life cycle is the end of the award, ensuring all grant transactions have been processed accurately and the grant activity has stopped to enable final invoicing, cash collection and reporting (activities collectively referred to as “close-out”). Both the Grants Portal and Milestone Notifications above will play key roles during close-out by providing staff quick access to financial data and automated email alerts of approaching grant end dates and actions required.
Grants Portal - FAQs

1. Why do I receive “You are not authorized to access this component” message?
   This message means that you have not been granted security access to the underlying pages in PeopleSoft as URI doesn’t currently use the functionality. These pages may be implemented in future releases.

2. What is the difference between FACADM (facilities & administration or indirect cost or overhead) budget item and the Total FA in the cost share section of Budget Status?
   FACADM is waived F&A that may be part of cost share on a project. Currently budgets for waived F&A are not carried to the Grants Portal.

3. What is THIRDPARTY budget item?
   If an award has committed third party cost share as part of the cost share commitment on the award, you will see THIRDPARTY as a budget item. Third party expenditures are entered by the Office of Sponsored Projects (OSP) as they are certified by the entity providing the cost share. These are not University financial transactions; therefore they are displayed for reporting purposes only. Currently budgets for third party are not carried to the Grants Portal.

4. Why aren’t amounts appearing on the Budget Status page?
   You must click the Search button on the Project Detail or the Award Detail page, then amounts will appear.

5. Why don’t the amounts on the Budget Status page tie to Budgets Overview?
   Grants Portal does not load information from Commitment Control (Budgets Overview). Data in Grants Portal comes directly from the feeder systems (e.g. General Ledger, Purchasing, Payables, etc.).

6. Why can’t I see today's transactions in the Grants Portal?
   Grants Portal gets loaded by a nightly staging process. Data reflected will be from the prior day.

7. Why can’t I see Dean’s Pledges in the Grants Portal?
   Dean’s Pledges are not awards. Grants Portal reflects data for actual awards granted to the University.

8. Where can I find the project F&A rate in the Grants Portal?
   Select the award, tab to project and click on Facilities and Administrative Rate and a table will appear with the rates.

Milestones – FAQs

9. Why didn't recipient receive a milestone notification?
   - Notification due date must be equal to the current date in order to be processed by the nightly process;
   - Check junk mail;
   - Recipient must have a user profile (access) in PeopleSoft with a valid e-mail address and workflow enabled. Contact security administrator (Dave Hansen at dhansen@mail.uri.edu)

10. Why doesn’t the link to the Grants Portal on the notification work for some recipients?
    This link will only work for the users involved in the Grants Portal pilot. Full rollout is expected by early 2014.