TN Department of Finance & Administration | Division of Accounts

Grants Basic Training

Create a Grant

Through the Proposal Method

Create a Grant through the Proposal Method Training Objectives

- Understanding the use of the Entry Template
- Step by Step Instructions on Creating the Grant Through the Proposal Method
  - Create Proposal
  - Create Budgets
  - Submit Proposal
  - Generate Award
  - Complete Award Profile
  - Finalize Project Budget
  - Complete Customer (revenue) Contract

Step 1 - Create Proposal Header

Grants Information Entry Template

Prepared by:		
Date Prepared:		
** *Fill in the information below for each grant agreement/Notice of Funding before creating Customer (revenue) Contract in Edison. If the Customer (revenue) Contract has more than one project, use Modified GI-Multi worksheet.*		
Part 1. Create Proposal and Budget: *Navigation: FSCM>>Grants>>Proposals>>Maintain Proposal>>Add a New Value tab*		
Step I	**Proposal Tab in Edison**	
1	Proposal ID # (15 is limit- *no spaces*) [1]	
2	Description (20 is limit) [2]	
3	Reference Award Number/FAIN & Edison Interdept. Supplier Contract ID [3]	
4	Title (30 is limit) [4]	
5	PI ID [5] /PI Name (Type in Last name) [A.]	
6	Sponsor ID/Sponsor Name [B.]	
7	CFDA [E.]	
8	Start Date [6]	
9	End Date [7]	
10	No. Periods	Always only one (1)

Step 2 and 3 - Create Location and Project(s)

Grants Information Entry Template

	Prepared by:	
	Date Prepared:	
** *Fill in the information below for each grant agreement/Notice of Funding before creating Customer (revenue) Contract in Edison. If the Customer (revenue) Contract has more than one project, use Modified GI-Multi worksheet.*		
Step II	Establish "Location" from Hyperlink in Edison, becomes Location Tab	
1	Location (choose generic 0000000000 - Tennessee) set up for each project	
Step III	Projects Tab in Edison (only one project should be checked as a Primary Project & Primary Project should have Primary Location checked)	
1	Project ID (15 limit & begins with 2 alpha BU [C]) *(no spaces)* [8]	
2	Project Title (20)-enter desired description of Project	
3	Department - 5 digit [9. & F.]	
4	Subdivision - 10 digit department [10. & F.]	
5	Institution = To agency (should default in) [11. & G.]	
6	Department Credit - 10 digit one (100%) [12]	
7	F&A Rate Department - 10 digit one [13]	

Excel Template to Enter Grants

Step 4 - Create Project Budget Header

Grants Information Entry Template

	Prepared by:					
	Date Prepared:					
	** *Fill in the information below for each grant agreement/Notice of Funding before creating Customer (revenue) Contract in Edison. If the Customer (revenue) Contract has more than one project, use Modified GI-Multi worksheet.*					
Step IV	Budget Tab>>Budget Header in Edison					
1	Budget ID becomes Activity (funding source) [14]					
2	Budget ID Description [15]					
3	Activity Type [16]					
5	Save Proposal (when you have saved proposal in Edison, mark "X" in box)					
4	F&A and Pricing Setup (if applicable, specific to agency) [17]	Rate Type:		FA Base:	Funded Rate:	

Step 5 - Create Project Budget

Grants Information Entry Template

Prepared by:	
Date Prepared:	

** *Fill in the information below for each grant agreement/Notice of Funding before creating Customer (revenue) Contract in Edison. If the Customer (revenue) Contract has more than one project, use Modified GI-Multi worksheet.*

Step V	Save and then Budget Tab>>Budget Period box "1"hyperlink in Edison									
1	**BUDGET**[D]	Account	Sponsor Direct (Billing Limit)[18]						Cost Share[19]	
			Federal	Interfed	Intermatch	Interlocal	Foundation	Nongov	State	ProgramInc
	LABOR_SALARY	70100								
	FRINGE	70200								
	TRAVEL	70300								
	PRINTING	70400								
	UTILITIES	70500								
	COMMUNICATION	70600								
	MAINT_REPAIR	70700								
	PROF_SRVC_3RD_P	70800								
	SUPPLIES	70900								
	RENT_N_INSUR	71000								
	VEHICLE	71100								
	AWARD_INDEMN	71200								
	GRANTS	71300								
	EQUIPMENT	71600								
	LAND	71700								
	BUILDING	71800								
	CONST_NON_BLDG	72000								
	TRAINING	72100								
	DATA_PROCESSING	72200								
	PROF_SRVC_STATE	72500								
	F&A_COSTS (automatic in creation of budget)	89040								
	Total Budget		-	-	-	-	-	-	-	-

Excel Template to Enter Grants

Submit, Initial Agency Review, Generate, Attributes, Finalize Budget, Finish Customer Contract, and Final Review by Agency

Grants Information Entry Template

Prepared by:	
Date Prepared:	

** *Fill in the information below for each grant agreement/Notice of Funding before creating Customer (revenue) Contract in Edison. If the Customer (revenue) Contract has more than one project, use Modified GI-Multi worksheet.*

Step VI	Submit Proposal	1st REVIEW	Generate (1st Review done before Generate Proposal to Award)
	*** Navigation: FSCM>>Grants>>Proposals>>Submit Proposal*		*** Navigation: FSCM>>Grants>>Proposals>>Generate Award*
1	Change/Review the submit status from "Not submitted" to "Submitted" and save.		Review all previously entered information before clicking "Generate"

Part 2.	Add "Attributes"	
	*** FSCM>>Grants>>Awards>>Award Profile>>Award tab>>Go To: Attributes*	
1	Check below "Attributes for SEFA/SIS Reporting .	
Check	**Attribute Type**	**Attributes Description**
☐	C	Cash
☐	F	Federal Government
☐	N	Other than Cash
☐	R	Research
☐	T	Pass Through
2	Go to "Attachments" hyperlink and add attachment such as grant agreement/notice of award.	

Part 3.	Make Adjustments to Project *** FSCM>>Grants>>Awards>>Project*
1	Make Project Type [20.& H.] "Grant" or Other (Agency specific). See "Info. 1-18" tab.

Part 4.	Finalize Project Budget *** FSCM>>Grants>>Awards>>Project Budgets*
1	Check begin and end date.
2	Check Cost Share Direct amounts and Sponsor Budget amounts, then "Finalize".
3	Click on the Process Monitor hyperlink to view run status in order to check errors.

Part 5. Check/Change Rate Set in Customer Contracts

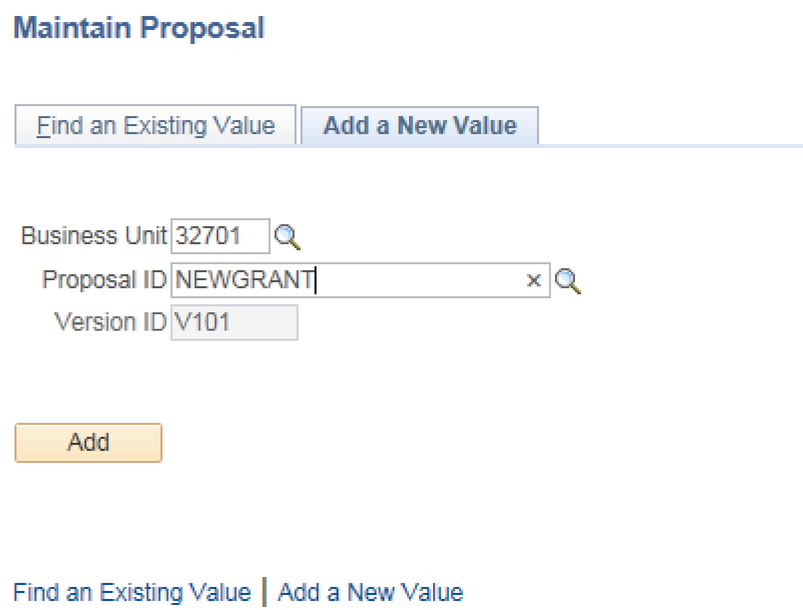
***FSCM>>Customer Contracts>>Create and Amend>>General Information*

1. Click billing plans hyperlink>>click B101 hyperlink
   In the Billing Default Overrides: Invoice Form "GM_GEN" and Bill By ID
2. Go back to General Information tab>>Lines tab>>Detail tab>>click "Contract
   Change Effective Date to grant start date, check Rate Set from below.

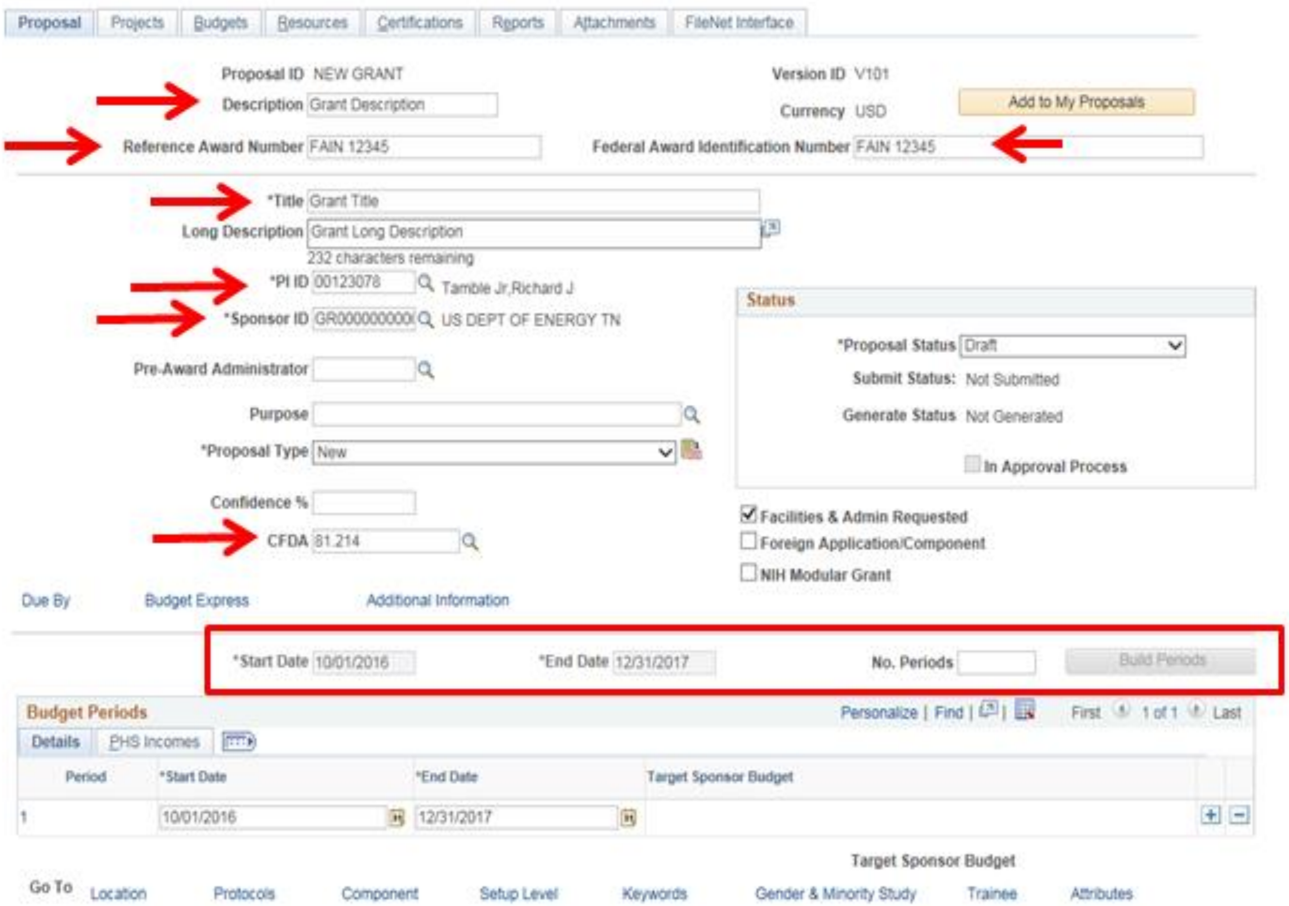
Check	Rate Set	Description	Effective Date
☐	68001	Federal Revenue	
☐	68002	Federal Capital Grants	
☐	68030	Counties	
☐	68050	Cities	
☐	68060	Nongovernmental	
☐	68070	Other State	
☐	68080	Current Services	
☐	68090	Interdepartmental	
☐	68095	Interdepartmental CU	
☐	STAT	Statistical or Agency Specific	

3. Change Contract Status to "Active" in General Information tab&Save.[21] Final

Creating a New Proposal through the Proposal Method – Create the Proposal ID



Creating a New Proposal through the Proposal Method
Enter the Proposal Header Page Information



Creating a New Proposal through the Proposal Method
Enter the Proposal Header Page Information

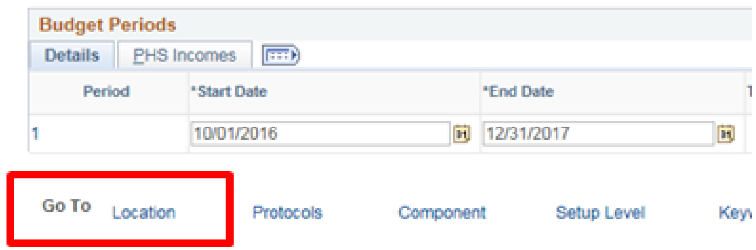
- **Description** - The description can be twenty (20) alpha/numeric characters, including spaces. Commas, percent signs, or special characters should not be used.
- **Reference Award Number** – Information entered depends upon who the grantor is.
  - When a Federal sponsor is the grantor/sponsor, the reference award number is the FAIN number assigned to the official notice received.
  - If it is a pass-through grant from another state agency, the reference award number is the interdepartmental supplier contract number or other identification number reported on the SIS schedule.
  - If it is not Federal or pass-through, this field should be left blank.
- **Federal Award Identification Number (FAIN number)** – Information entered depends upon who the grantor is.
  - When a Federal sponsor is the grantor/sponsor, the FAIN number is the number assigned to the official notice received.
  - If this is a pass-through grant of Federal dollars from another state agency, the primary agency's Federal grant award FAIN number should be entered here.
  - If this is a pass-through grant of Federal dollars from a city, county, other state, or entity, the primary recipients' Federal grant award's FAIN number should be entered here.
  - If it is not Federal or pass-through, this field should be left blank.
- **Title** – The title can be fifty (50) alpha/numeric characters, including spaces. Commas, percent signs, or special characters should not be used.
- **Long Description** – The long description can be up to 254 alpha/numeric characters. This is an optional field.
- **PI ID** – The employee ID of the Principal Individual (PI) assigned to the Customer (revenue) Contract. PI's span across business units. The easiest way to look up a PI is to search by last name.
- **Sponsor ID** – The customer number for the Sponsor assigned to the Customer (revenue) Contract.
- **Purpose** – This is an optional field.

Creating a New Proposal through the Proposal Method Enter the Proposal Header Page Information

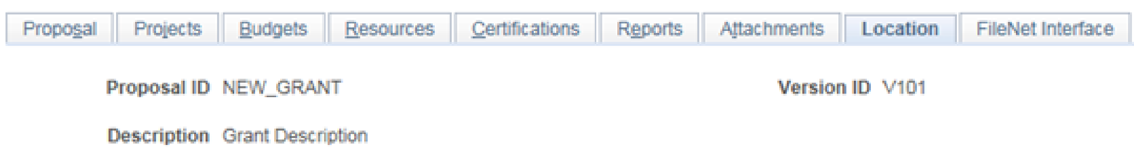
- **CFDA** – The Catalog of Federal Domestic Assistance number of the Proposal/Grant/Customer (revenue) Contract. Only one CFDA can be assigned, but if a Federal Grant has multiple CFDA numbers, the grant should be broken down into multiple grants. If a grant does not have a CFDA number, a CFDA number of 00.00 should be used.
- **Start Date** – Enter the Start Date.
  - The State Date should be the Federal Award beginning date.
  - The Start Date defaults to current date.
  - The Start Date creates the Begin Date of the Proposal ID, Customer (revenue) Contract, Award Profile, Project ID, Activity, and Project Budget.
- **End Date** – Enter the End Date.
  - The End Date should be the Federal Award ending date.
  - The End Date creates the End Date of the Proposal ID, Customer (revenue) Contract, Award Profile, Project ID, Activity, and Project Budget.
- **Enter "1" in the "No. Periods" box and click the "Build Periods" button**. This will populate the Budget Period start and end dates. A Proposal/Grant/Customer (revenue) Contract should only have one period regardless if the grant is for one year or multiple years.
- Other fields are optional, and as a general rule should be left as pre-populated or blank.

Creating a New Proposal through the Proposal Method
Establish a Location for Proposal for each Project

- Click on the “Location” hyperlink to create the location tab (page) in the Proposal.

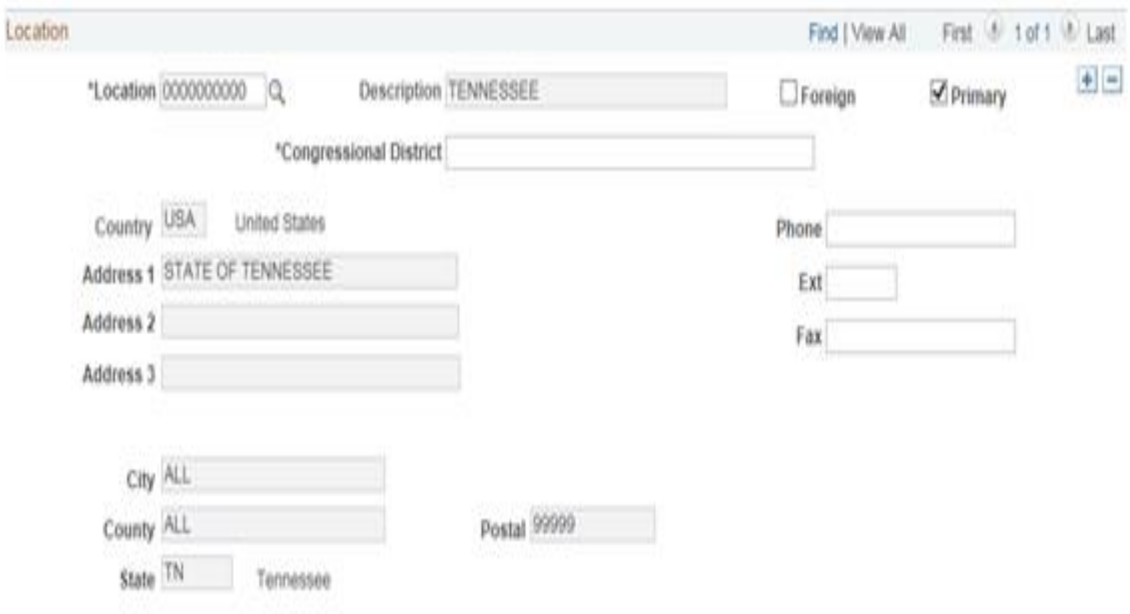


- Once the “Location” hyperlink has been clicked, the Location tab will appear as a page.



- Click on the Location box and type in “0000000000” and enter or use the lookup icon to choose “0000000000” for State of Tennessee generic location.
  - A location is required for each Project ID.
  - A “Primary” designation is required for the primary Project ID.
  - A Congressional District is not a required field, although it is marked with a “*”.
  - This location is different from the Location chartfield entered for purchasing, accounts payable, or general ledger transactions.
  - All other fields should be left as pre-populated through the default.

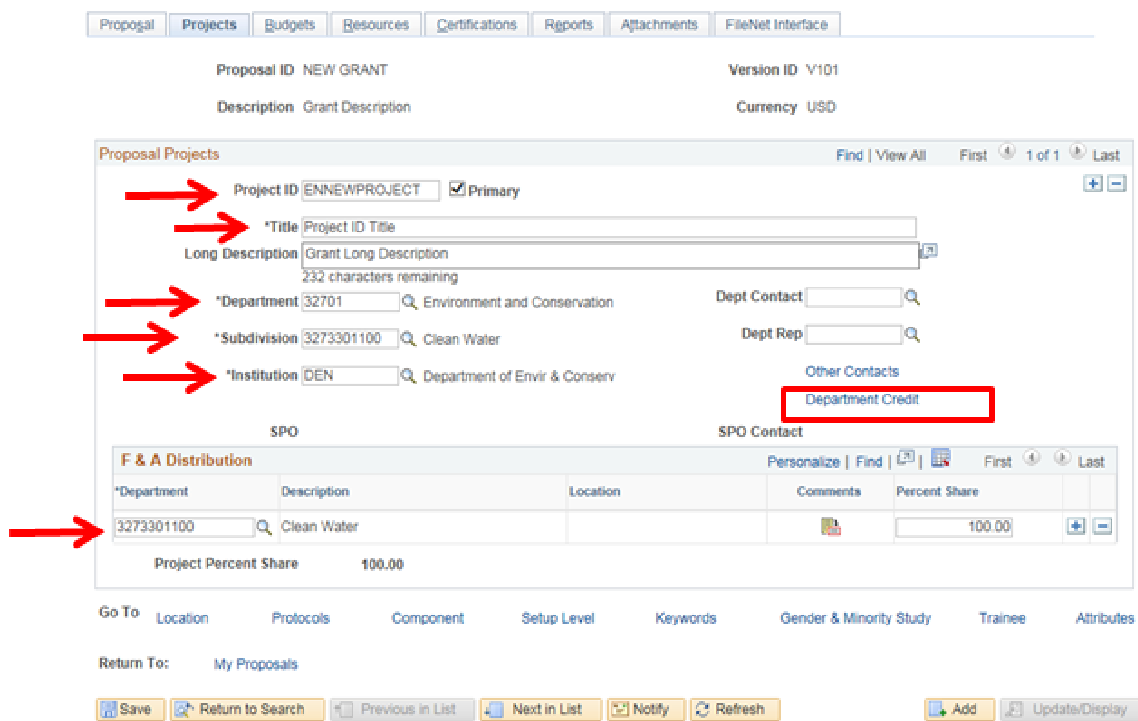
Creating a New Proposal through the Proposal Method
Establish a Location for Proposal for each Project



Creating a New Proposal through the Proposal Method - Create a Project for the Proposal

Step 4: Create the Project for the Proposal

- Click on the Projects tab. "NEXT_1" defaults in as the Project ID – delete this and enter the desired Project ID.



Creating a New Proposal through the Proposal Method - Create a Project for the Proposal

SPECIAL NOTES:

Certain fields on the Projects page (tab) will automatically default in based upon the PI ID that was entered on the Proposal page. **Most of these need to be changed!**

- The Title of the Project will default with the Title of the Proposal. This is not an issue if the grant only has one project; however if the grant has multiple projects, the Title needs to be different for each project. The Title is limited to fifty (50) alpha/numeric characters; however, it is highly recommended to use no more than thirty.
- The **Department** will default with the PI's home Department (10 digits) – this field needs to reflect a **5 digit department/allotment** for the grant and will be the five digit department associated to the Project ID on the Project Budget.
- The **Subdivision** will default with the PI's home Subdivision (5 digits) – this field needs to reflect the **10 digit allotment/department** associated with the grant.
- The Institution will default as the Agency name. The Institution is a one-to-one relationship with a business unit and is a required field. F&A or Indirect Cost processing occurs through the business unit's Institution setup.
- The **F&A Distribution Department** will default in with the PI's home Department (10 digits) – this field is used to create the offset F&A entry and revenue for an indirect cost. This field needs to reflect the **10 digit department** number associated with the grant.
- The **Department Credit** hyperlink will default the PI's home Department (10 digits) – this field needs to reflect the **10 digit department** number associated with the grant.

Creating a New Proposal through the Proposal Method - Create a Project for the Proposal

- Click on the Title field and enter a Title for the Project ID.
- Click on the Department field and use the lookup icon to select the five (5) digit Budget department/allotment for the Proposal/Grant/Customer (revenue) Contract.
- Click on the Subdivision field and use the lookup icon to select the ten (10) digit department for the Proposal/Grant/Customer (revenue) Contract.
- Click on the Institution field and use the lookup icon to find the corresponding Institution for the Business Unit.

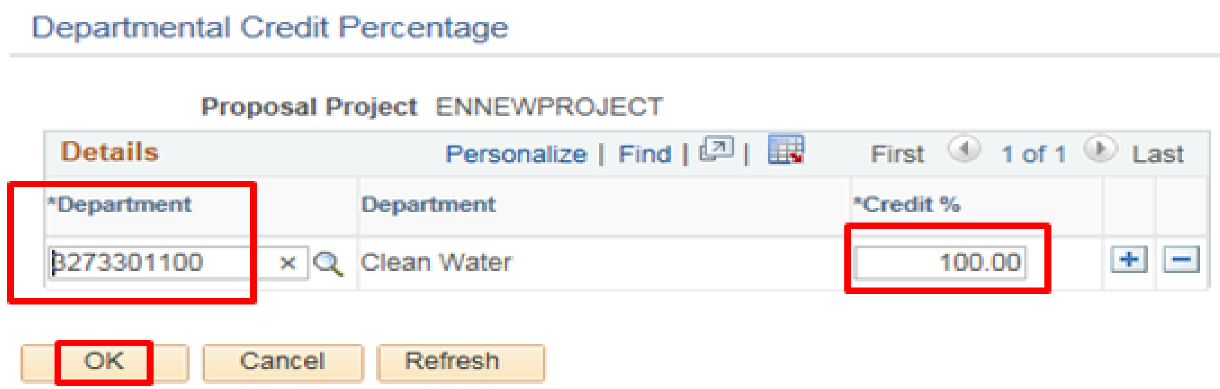
To enter the Department related to F&A Distribution or Indirect Cost Department:

- Click on the Department field and enter the desired ten (10) digit department for the Proposal/Grant/Customer (revenue) Contract and enter 100% in the percentage field.

Creating a New Proposal through the Proposal Method - Create a Project for the Proposal

The Department Credit hyperlink located just across from the Institution needs to be populated.

- Click on the Department Credit hyperlink.
- Click on the Department field and use the lookup icon to find the ten (10) digit department for the grant and enter 100% in the percentage field.



- Click OK to return to the Projects tab (page).

Note: Long Description, Dept Contact and Dept Rep are not required fields and do not have to be populated.

Creating a New Proposal through the Proposal Method - Create Budget Header for each Project ID

Step 5: Create the Budget Header for the Project

- Click on the Budgets tab (page).

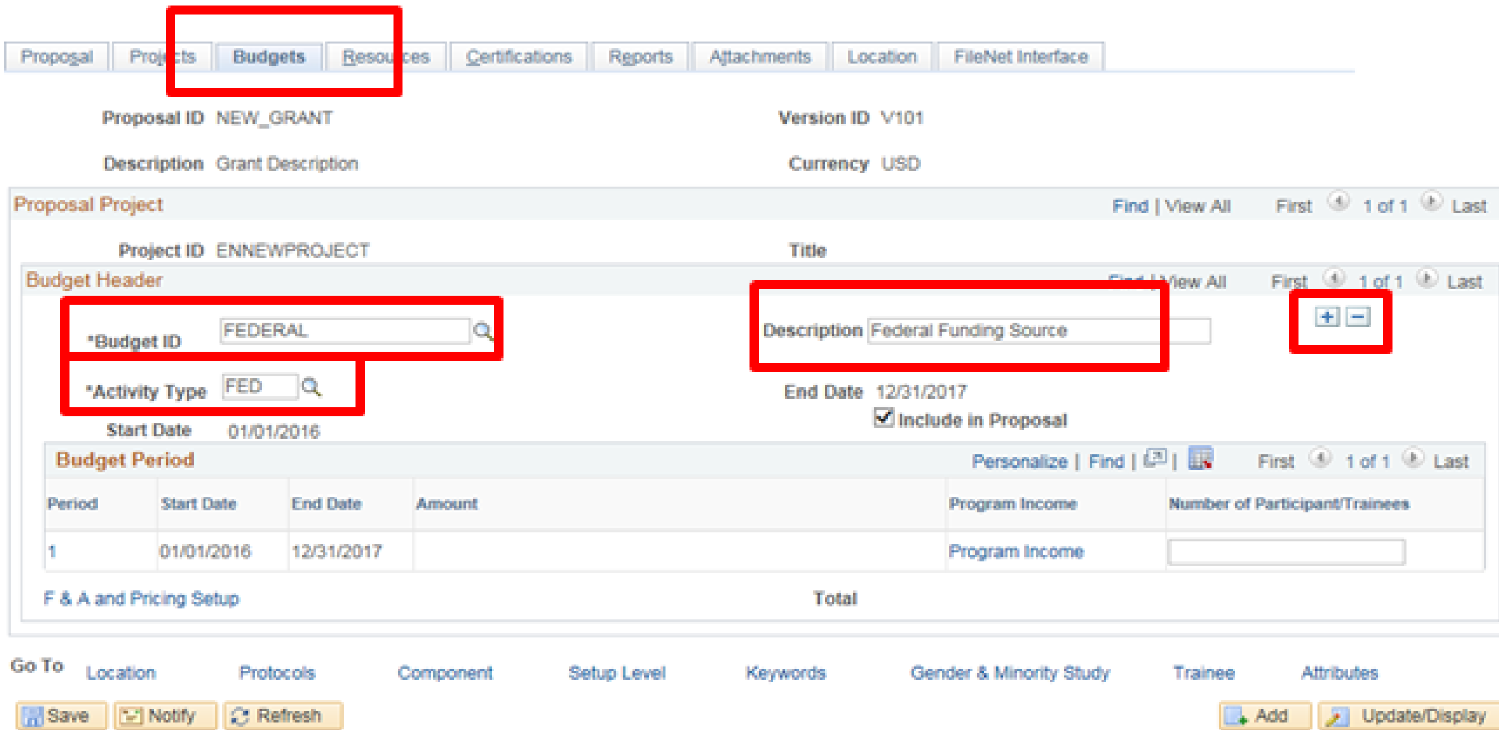
The Budget ID becomes the Activity ID once the proposal has been generated into an Award. The Budget Period "Start and End Dates" automatically populate once the Proposal is saved.

- Click the lookup icon beside the Budget ID field and select a standard Activity. FEDERAL is the default.

- Click in the Description field and enter the funding source description. The Description should reflect the Budget ID through which the Proposal/Grant/Project ID is funded.

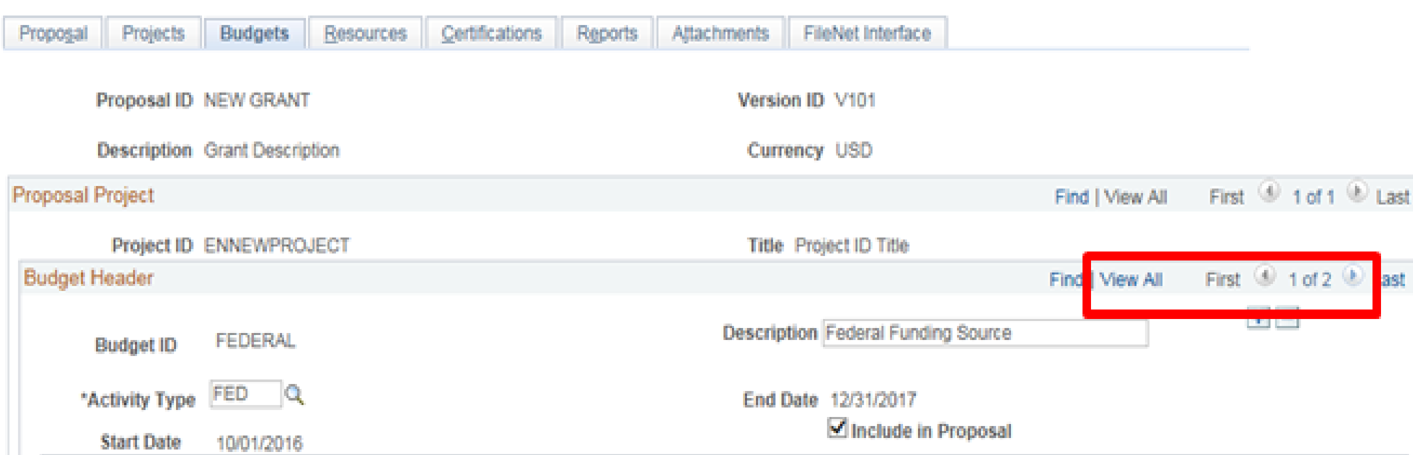
- Click the lookup icon beside the Activity Type field and select the Activity Type. The Activity Type is now a required field and should relate to the Budget ID selected.

Creating a New Proposal through the Proposal Method - Create Budget Header for each Project ID

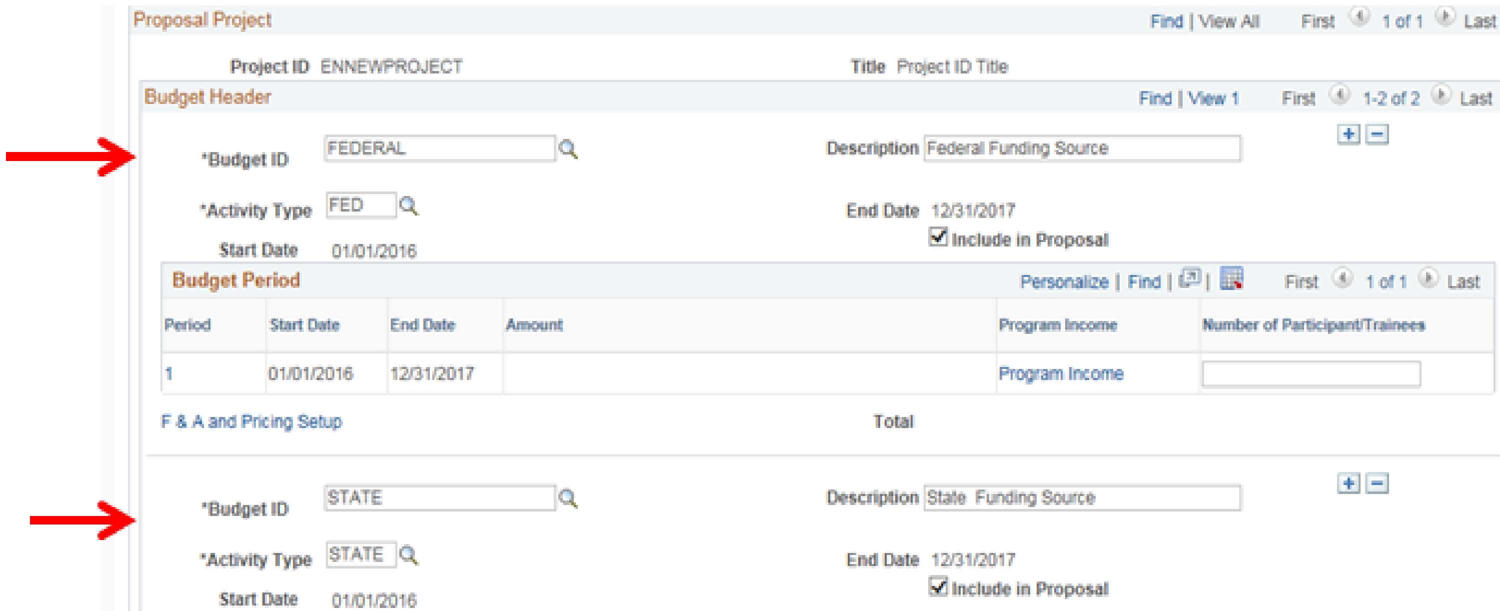


Creating a New Proposal through the Proposal Method - Add additional Activities if needed for each Project ID

- If additional Activities are needed, click the plus sign below the Budget Header line to add additional Budget IDs/Activities.
- Select "View All" on the Proposal Project blue line and "View All" on the Budget Header line to see all Activities related to the Project ID associated to the Proposal/Grant/Customer (revenue) Contract.



Creating a New Proposal through the Proposal Method - Add additional Activities if needed for each Project ID



Provided that Steps 1 through 5 have been done, the Proposal can now be saved. Entering the Proposal has time constraints in Edison and it is highly recommended when entering a Customer (revenue) Contract through the Proposal method to enter the information necessary to create the Proposal and at least one Project ID and Project Activity before saving. If saved before completing Steps 1 through 5, auto-generated Project ID(s), incorrect Project Activity(s), or improper departments could result.

Creating a New Proposal through the Proposal Method Optional Setup Procedures – Add Additional Project(s) & Activity(s)

Step 7: Optional Setup Procedures – Add Additional Project ID(s) and Activity(s)

- Additional Projects can be added; for each Project ID and Activity added:
  - ➢ Click the plus sign below the "Proposal Projects" Blue line and select "View All" to display all related Project IDs.
  - ➢ Click on the Title field and enter a Title for the additional Project ID.
  - ➢ Click on the Department field and use the lookup icon to select the five (5) digit Budget department/allotment for the Proposal/Grant/Customer (revenue) Contract.
  - ➢ Click on the Subdivision field and use the lookup icon to select the ten (10) digit department for the Proposal/Grant/Customer (revenue) Contract.
  - ➢ Click on the Institution field and use the lookup icon to find the corresponding Institution for the Business Unit.

Creating a New Proposal through the Proposal Method Optional Setup Procedures – Add Additional Project(s) & Activity(s)

To enter the Department related to F&A Distribution or Indirect Cost Department:

- Click on the Department field and enter the desired the ten (10) digit department for the Proposal/Grant/Customer (revenue) Contract and enter 100% in the percentage field.

The Department Credit hyperlink located just across from the Institution needs to be populated.

- Click on the Department Credit hyperlink.
- Click on the Department field and use the lookup icon to find the ten (10) digit department for the grant and enter 100% in the percentage field.
- Click OK to return to the Project tab (page).

Creating a New Proposal through the Proposal Method Optional Setup Procedures – Add Additional Project(s) & Activity(s)

Create the Budget Header for each Project ID added.

- Click on the Budgets tab (page).
- Click on the lookup icon beside the Budget ID field and select a standard Activity. FEDERAL is the default.
- Click in the Description field and enter the funding source description. The Description should reflect the Budget ID through which the Proposal/Grant/Project ID is funded.
- Click the lookup icon beside the Activity Type field and select the Activity Type. The Activity Type is now a required field and should relate to the Budget ID selected.

Establish a Location for each Project ID added.

- Click on the Location page (tab) and click View All.
- Click on the Location box and type in “0000000000” and enter or use the lookup icon to choose “0000000000” for the State of Tennessee generic location for each Project ID added.

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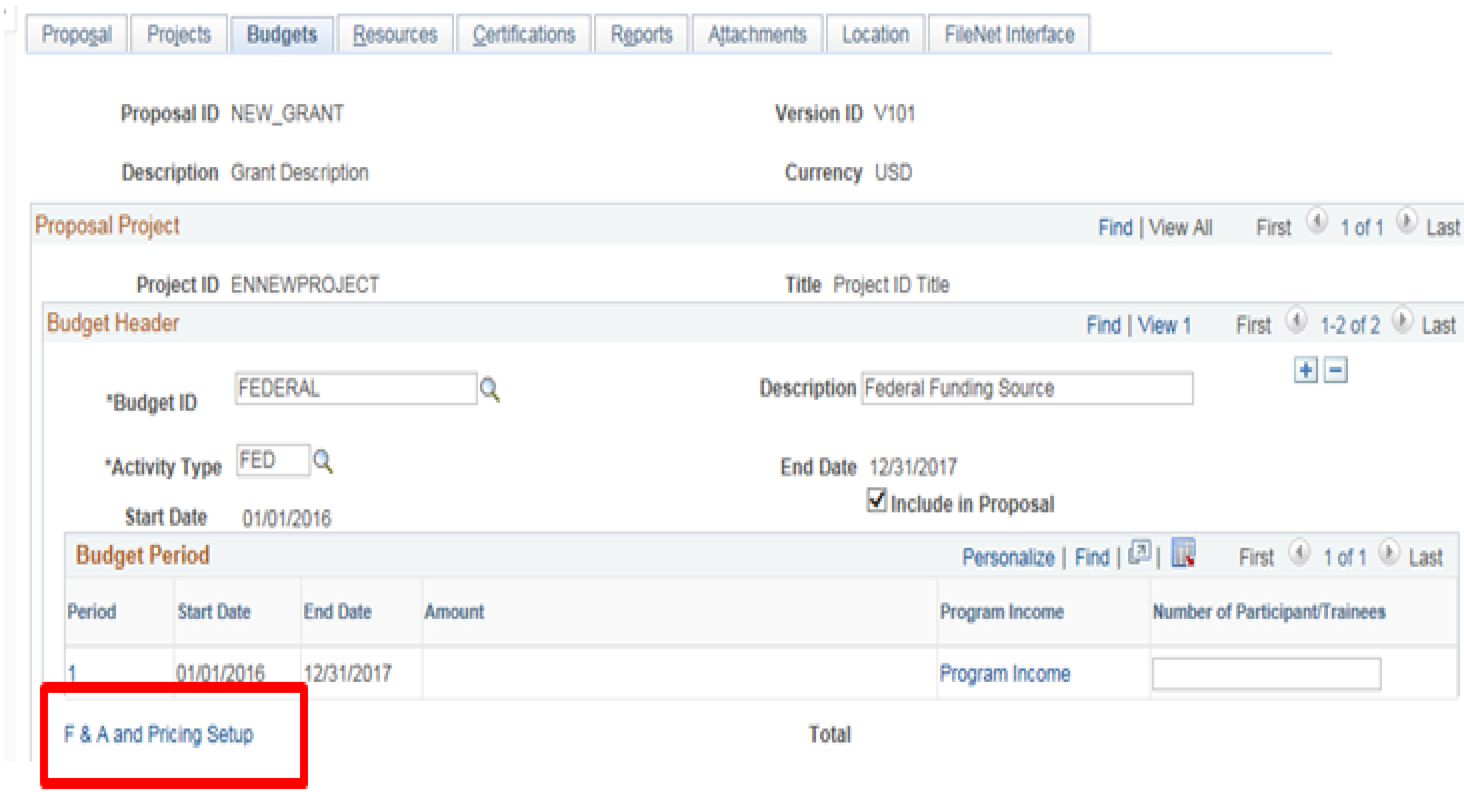
Creating a New Proposal through the Proposal Method
Create F&A/Indirect Cost for each Project Activity



Creating a New Proposal through the Proposal Method
Create F&A/Indirect Cost for each Project Activity

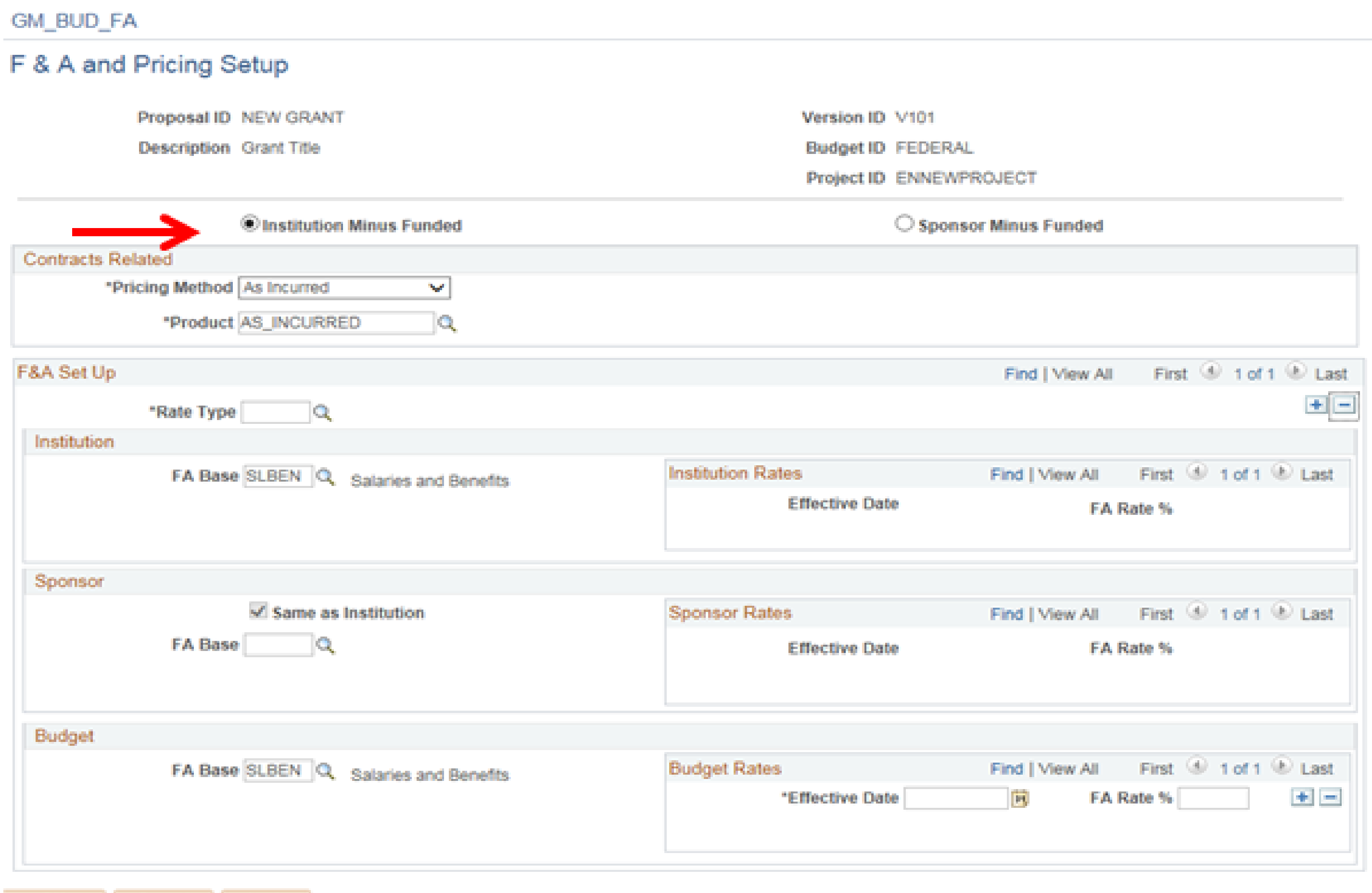
Step 8: Create Facilities and Administration (FA/F&A/Indirect Cost) Cost Pricing Setup for each Project Activity (If not applicable, proceed to step 9)

If the grant being created allows for indirect cost, and the business unit/agency wants to utilize the automated indirect cost processing functionality, the F&A (Indirect Cost) setup should be done at this point.

- Navigation:
  - ➢ Click on FSCM> Grants> Proposal> Maintain Proposal
- Enter a Business Unit and the proper Proposal ID and click on Search.
  - ➢ Click on the Budgets page (tab).
  - ➢ Click on the F&A and Pricing Setup hyperlink.

The FA Rate Type selected will default in the applicable Institution's (Business Unit/agency) FA Base, FA Rate %, Budget FA Base, and Budget FA Rate %. The FA Base with FA Rate % determines the expenditures that will produce indirect cost or SFA rows which will ultimately recognize revenue and produce a billing.

Creating a New Proposal through the Proposal Method
Create F&A/Indirect Cost for each Project Activity



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Creating a New Proposal through the Proposal Method Create F&A/Indirect Cost for each Project Activity

F&A Rates and Bases need to be established for every billable Activity that should generate F&A (Indirect Cost) pricing. The system uses the rates and bases to automatically process the F&A (Indirect Cost) for transactions using the particular Project ID and Activity.

- On F&A and Pricing Setup page, defaults are "Institution Minus Funded" radio button clicked, Pricing Method "As Incurred", and Product "AS_INCURRED." All should be left as defaulted.
  - In the F&A Set Up section, click the lookup icon to the right of the Rate Type box and look up a valid value for auto-generated F&A (Indirect Cost) to process. These are unique to a business unit/agency.
  - Select the appropriate FA Rate ID for the particular Proposal/Grant/Project ID. FA Rates are business unit/agency specific.

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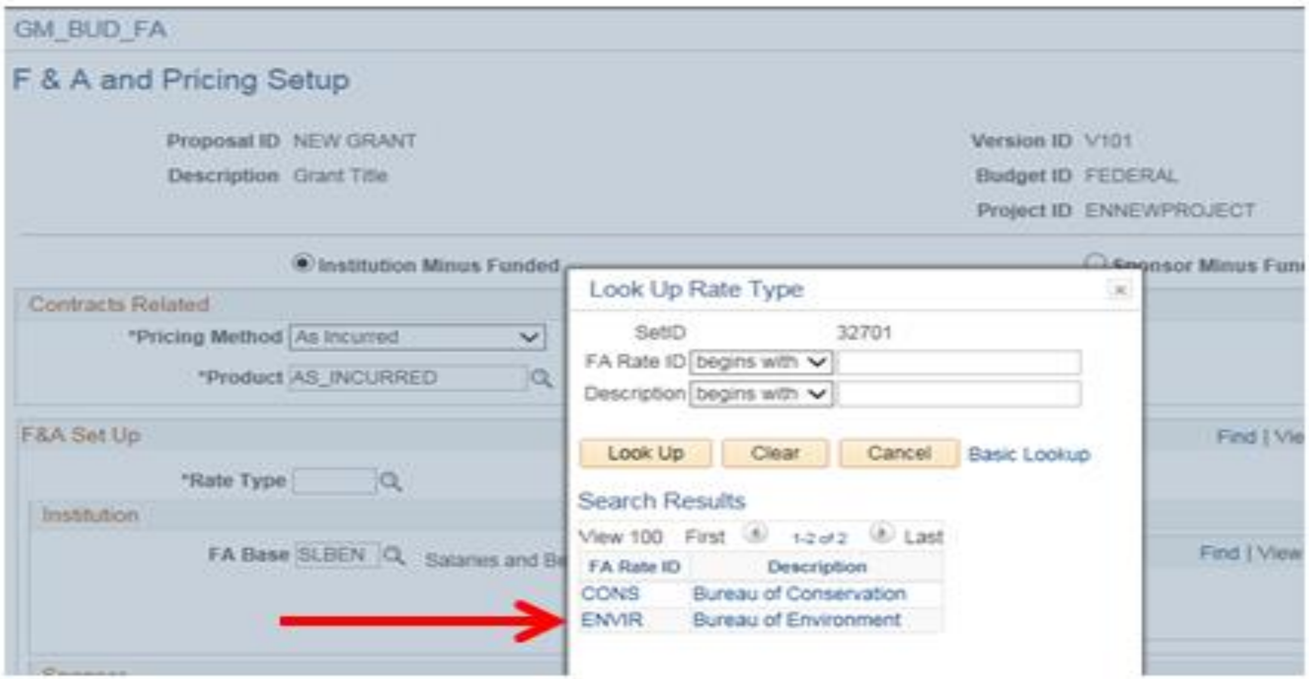
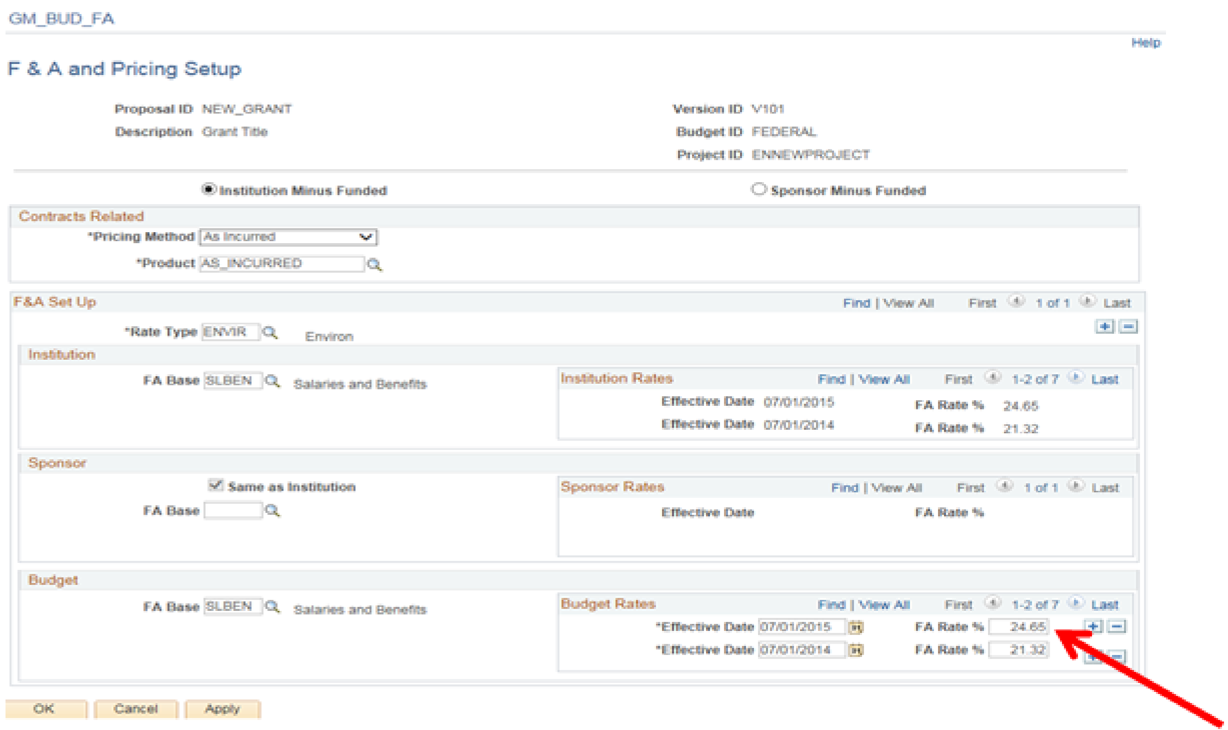
Creating a New Proposal through the Proposal Method Create F&A/Indirect Cost for each Project Activity



Creating a New Proposal through the Proposal Method
Create F&A/Indirect Cost for each Project Activity

The Budget FA Base and the Budget FA Rate % should typically be the same as the Institution's FA Rate and Base, and both should have the same effective date. The FA Base and FA Rate % would be the most recently approved Federal cognizant F&A/Indirect Cost Rate percentage configured by the Edison FSCM team.



If the funded grant rate is different, change here.

Creating a New Proposal through the Proposal Method Create F&A/Indirect Cost for each Project Activity

If the Grant calls for a different FA Base and FA Rate (normally lower) than the federally approved rate, then:

1) The Budget FA Rate % would need to be updated and the effective date populated with the "Start Date" of the grant.
2) If the Budget FA Rate % is lower than the Institution rate, a "Waived or WFA" amount will be produced to the Project ID. These waived F&A amounts will not be recorded in the general ledger.

- Click OK. The Budget FA Base and FA Rate % will produce the billable SFA rows in Project Costing and create the 89040 F&A/Indirect Cost portion of the Project Budget if using the automated F&A/Indirect Cost processing. After clicking OK, the Proposal Project screen at the Budget Header page will re-appear.

- Click Save.

If there is more than one Project ID associated to a Proposal/Grant/Contract (revenue) Contract, F&A and Pricing Setup must be entered for each Project ID.

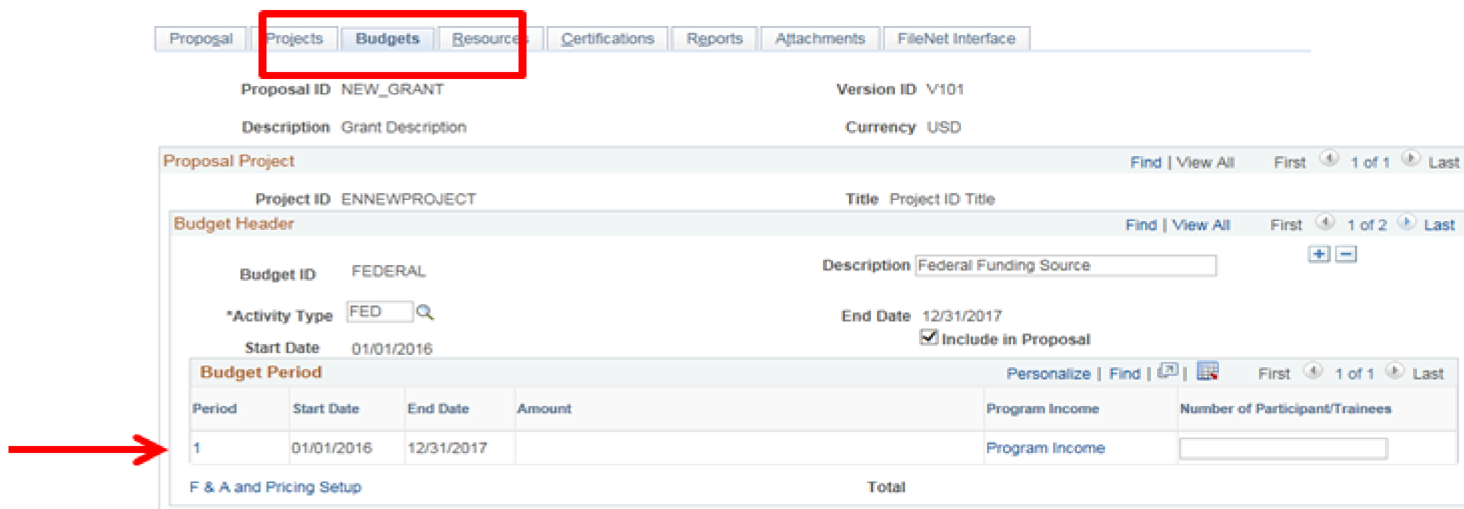
Creating a New Proposal through the Proposal Method Establish Budgets for each Activity

Step 9: Establish Budgets for each Activity

Create the Detailed Budgets

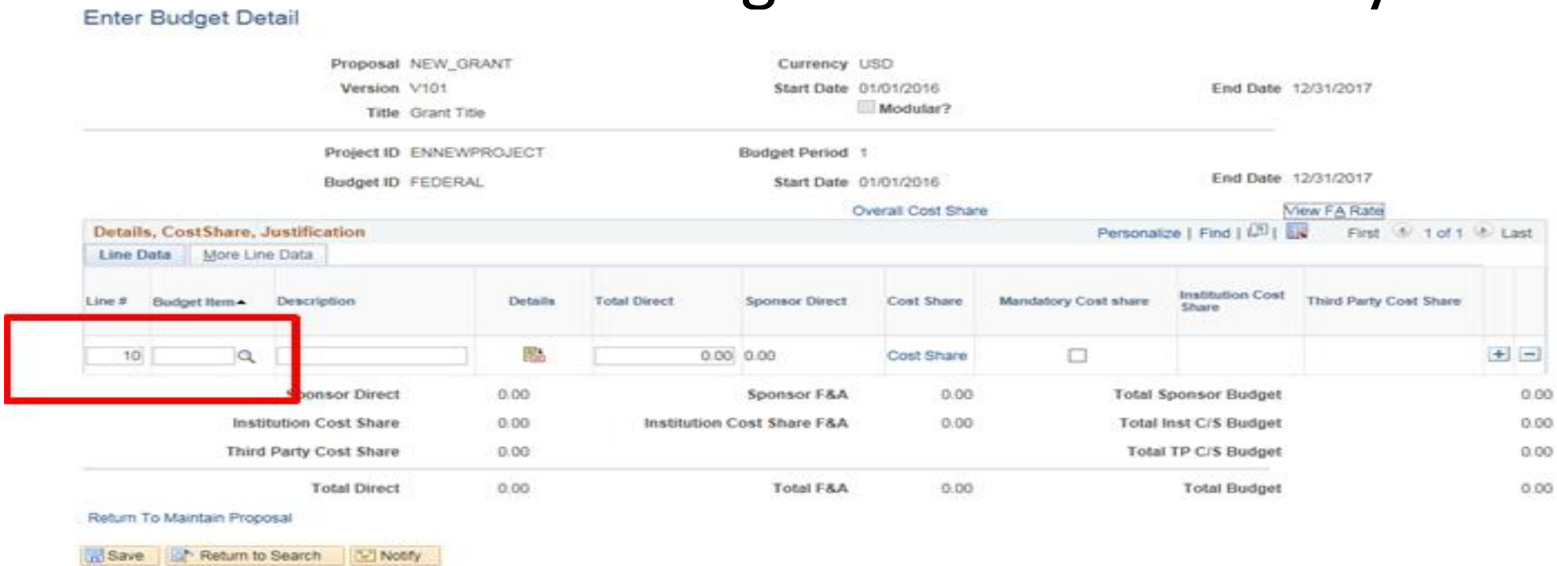
- Click on the Proposal Budgets tab (page) if you are continuing from the previous step.
- If not continuing from previous step: Navigation> FSCM> Grants> Proposals> Enter Budget Detail.

First, Create the Billable Budgets for each Project ID's Activity(s)

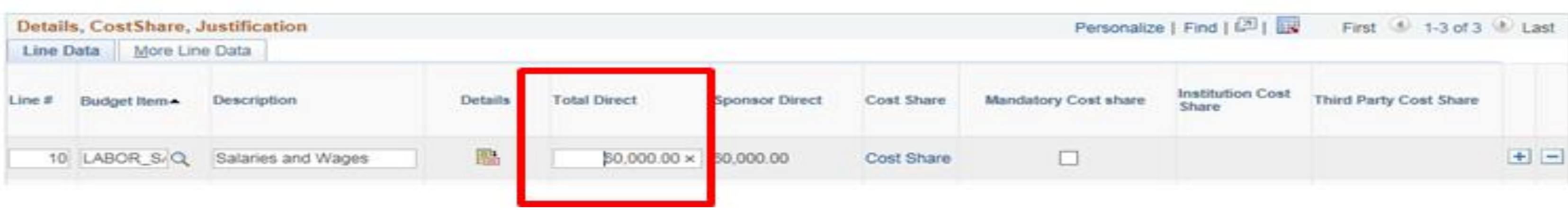


- Click the hyperlink Period "1" to bring up the "Enter Budget Detail" page.

Creating a New Proposal through the Proposal Method
Establish Budgets for each Activity



- Select the Budget Item needed by clicking the lookup icon.
- Enter the Total Direct amount (funded and billable amount on the award document) for each Budget Item. If cents are included in the Total Direct amount, the Sponsor Direct amount will round the value being entered to the nearest dollar.



Creating a New Proposal through the Proposal Method
Establish Budgets for each Activity

- Click the plus sign if more than one Budget Item is needed. Enter all Budget Items needed for each billable Project's Budget/Activity.

Details, CostShare, Justification — Personalize | Find | First 1-5 of 5 Last

Line Data | More Line Data

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share	
10	LABOR_S/	Salaries and Wages		60,000.00	60,000.00	Cost Share	☐			+ −
20	FRINGE	Employee Benefits		20,000.00	20,000.00	Cost Share	☐			+ −
30	TRAVEL	Travel		10,000.00	10,000.00	Cost Share	☐			+ −
40	SUPPLIES	Supplies		50,000.00	50,000.00	Cost Share	☐			+ −
50	GRANTS	Grants and Subsidies		100,000.00	100,000.00	Cost Share	☐			+ −

Creating a New Proposal through the Proposal Method
Establish Budgets for each Activity

Notes:

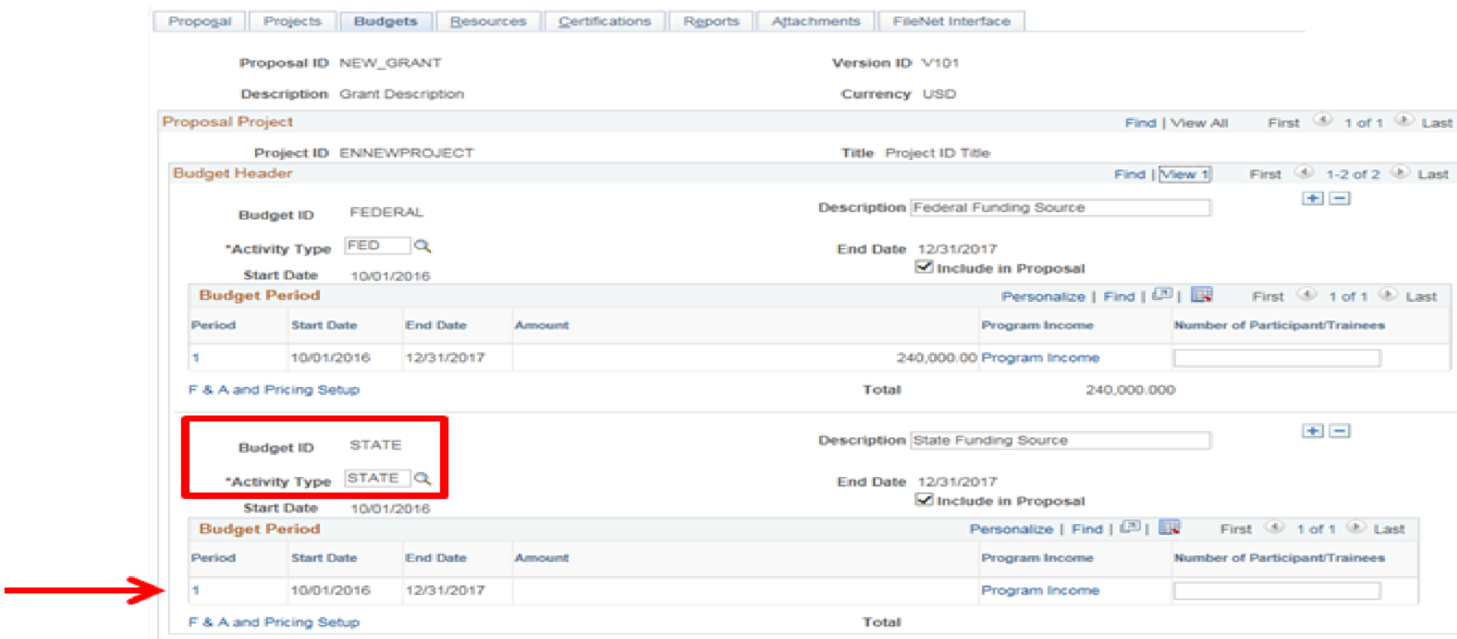
1) Budget lines are automatically numbered by the system when lines are added. This numbering has no impact on grants processing.
2) If indirect cost will be manually processed, an F&A_COST line would have to be added. Manual indirect cost processing is addressed fully in the Indirect Cost section of the Grant Manual.
3) If indirect cost is being processed automatically, the F&A budget line will be automatically created and does not need to be entered.
4) Review each Project's Direct/billable budget to make sure the amount funded is equal to the funded grant amount(s).

- Click Save once all Budget Items are entered on the Budget Detail page.

Creating a New Proposal through the Proposal Method Establish Budgets for each Activity

<u>Second, Create the Budgets for the Cost Shared/Non-billable Project Budget/Activity(s) (if applicable)</u>

- Navigate to the Budget Header tab to view the Cost Shared/Non-billable Activity(s).
- Click on Period "1" on the Budget ID for the appropriate Cost Shared/Non-billable Activity.



- Enter the desired Budget Item(s) and enter the budget amounts in the Total Direct fields. Once the amounts are properly cost shared they will not add to the billable value of the Customer (revenue) Contract.

Creating a New Proposal through the Proposal Method
Establish Budgets for each Activity

The following screen shot shows the values in the Cost Shared budget before they are Cost Shared:

Enter Budget Detail

Proposal NEW_GRANT | Currency USD
Version V101 | Start Date 10/01/2016 | End Date 12/31/2017
Title Grant Title | Modular?

Project ID ENNEWPROJECT | Budget Period 1
Budget ID STATE | Start Date 10/01/2016 | End Date 12/31/2017

Overall Cost Share | View FA Rate

Details, CostShare, Justification | Personalize \| Find \| First 1-5 of 5 Last

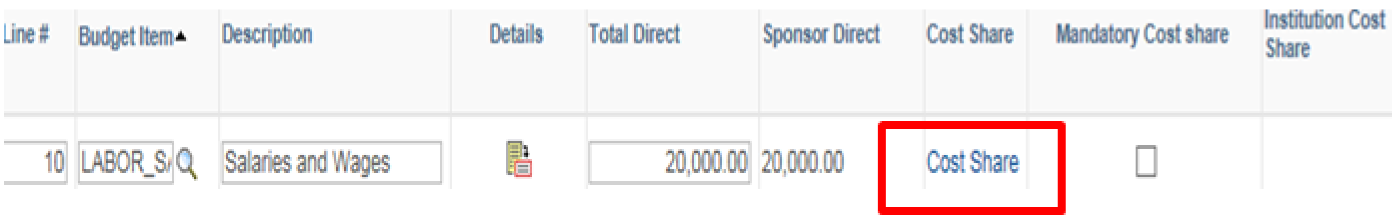
Line Data | More Line Data

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share
10	LABOR_S/	Salaries and Wages		20,000.00	20,000.00	Cost Share	☐		
20	FRINGE	Employee Benefits		6,667.00	6,667.00	Cost Share	☐		
30	TRAVEL	Travel		3,333.00	3,333.00	Cost Share	☐		
40	SUPPLIES	Supplies		16,667.00	16,667.00	Cost Share	☐		
50	GRANTS	Grants and Subsidies		33,333.00	33,333.00	Cost Share	☐		

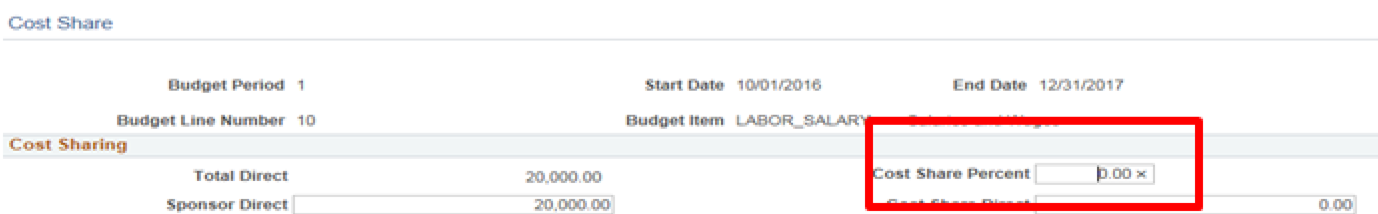
Sponsor Direct	80,000.00	Sponsor F&A	0.00	Total Sponsor Budget	80,000.00
Institution Cost Share	0.00	Institution Cost Share F&A	0.00	Total Inst C/S Budget	0.00
Third Party Cost Share	0.00			Total TP C/S Budget	0.00
Total Direct	80,000.00	Total F&A	0.00	Total Budget	80,000.00

Creating a New Proposal through the Proposal Method
Establish Budgets for each Activity

- Click the Cost Share hyperlink on each Budget line to bring up the Cost Share page.

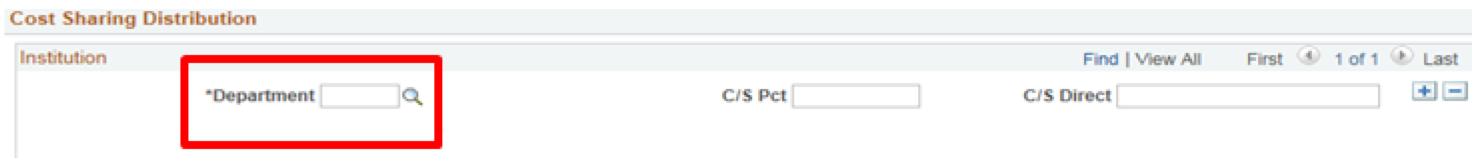


- Click in the "Cost Share Percent" field in the Cost Sharing section and enter 100. Tab out of the field. **DO NOT HIT ENTER.**

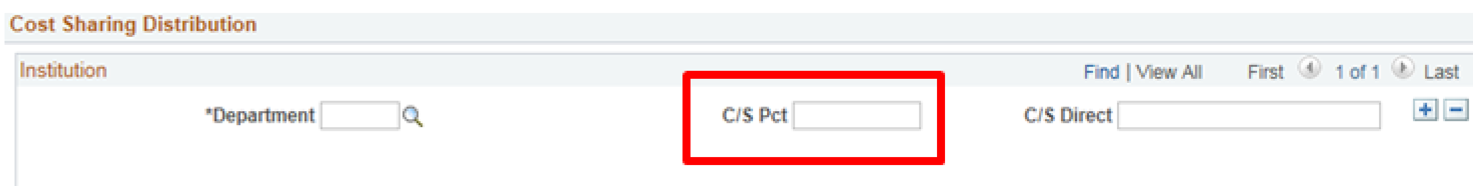


Creating a New Proposal through the Proposal Method
Establish Budgets for each Activity

- Click in the Cost Sharing Distribution section and use the lookup icon to select the five (5) digit GL department specific to the Project ID. Tab out of the field. **DO NOT HIT ENTER.** This will become the five digit budget department created on the Cost Shared lines on the Project ID's budget.



- Click on the C/S Pct in the Cost Sharing Distribution section under Institution and enter 100. Tab out of the field. **DO NOT HIT ENTER.**



Creating a New Proposal through the Proposal Method
Establish Budgets for each Activity

Cost Sharing must be done to each Budget Item line that is non-billable through the Customer (revenue) Contract. When a Budget item is properly Cost Shared, no amount will exist in the Sponsor (billable) Direct Fields for the line, rather the amount will show in the fields for Institution Cost Share.

- Click Save when all Budget Item details have been entered and Cost Shared.

Enter Budget Detail

Proposal NEW_GRANT | Currency USD
Version V101 | Start Date 10/01/2016 | End Date 12/31/2017
Title Grant Title | Modular?

Project ID ENNEWPROJECT | Budget Period 1
Budget ID STATE | Start Date 10/01/2016 | End Date 12/31/2017

View FA Rate

Details, CostShare, Justification — Personalize | Find | First 1-5 of 5 Last

Line Data | More Line Data

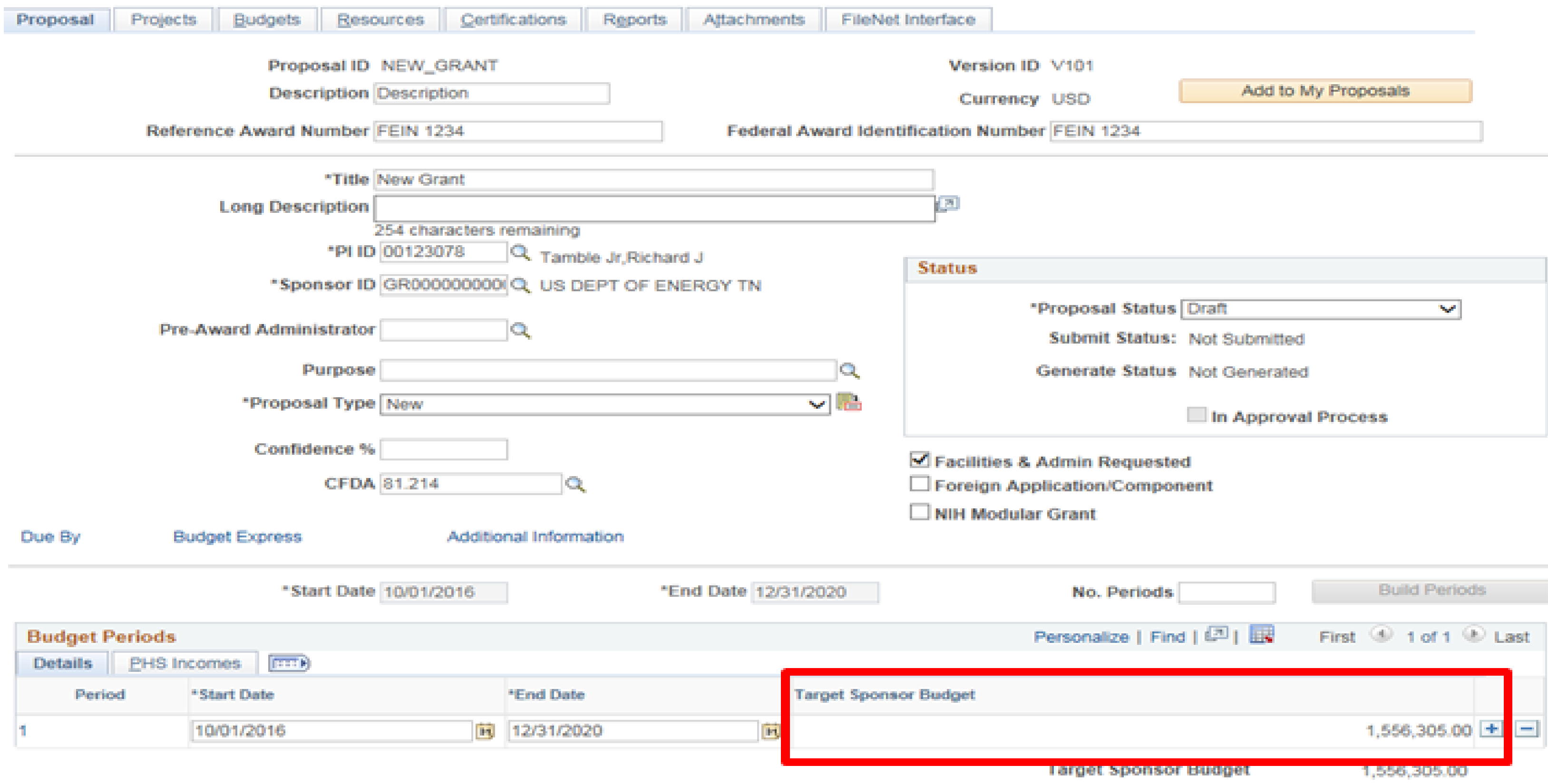
Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share
10	LABOR_S	Salaries and Wages		20,000.00	0.00	Cost Share	☐	20,000.00	
20	FRINGE	Employee Benefits		6,667.00	0.00	Cost Share	☐	6,667.00	
30	TRAVEL	Travel		3,333.00	0.00	Cost Share	☐	3,333.00	
40	SUPPLIES	Supplies		16,667.00	0.00	Cost Share	☐	16,667.00	
50	GRANTS	Grants and Subsidies		33,333.00	0.00	Cost Share	☐	33,333.00	

Sponsor Direct	0.00	Sponsor F&A	0.00	Total Sponsor Budget	0.00
Institution Cost Share	80,000.00	Institution Cost Share F&A	0.00	Total Inst C/S Budget	80,000.00
Third Party Cost Share	0.00			Total TP C/S Budget	0.00
Total Direct	80,000.00	Total F&A	0.00	Total Budget	80,000.00

Return To Maintain Proposal

Creating a New Proposal through the Proposal Method Double Check Total Funding

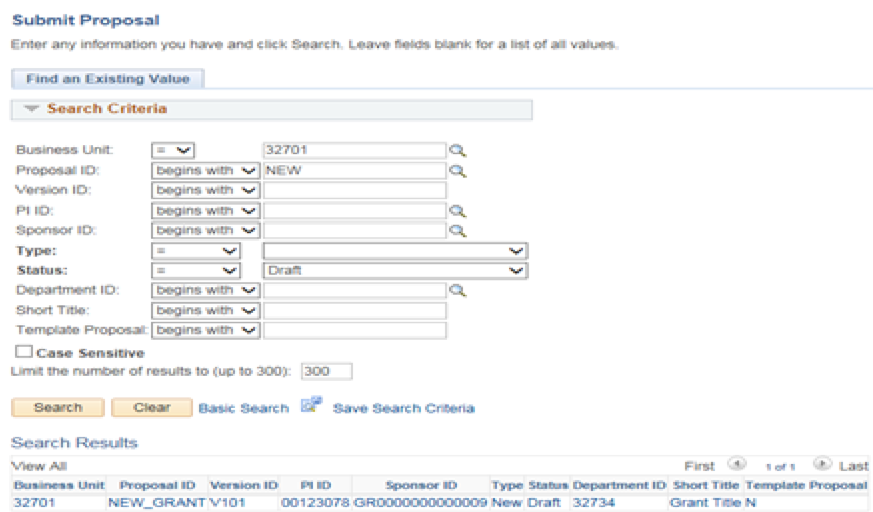
Important note: As a double check always click on the Proposal main page to make sure the amount of the Target Sponsor Budget is the total amount being funded by the Award document.



Creating a New Proposal through the Proposal Method Submit Proposal

Section 3.1.2 - Submit the Proposal

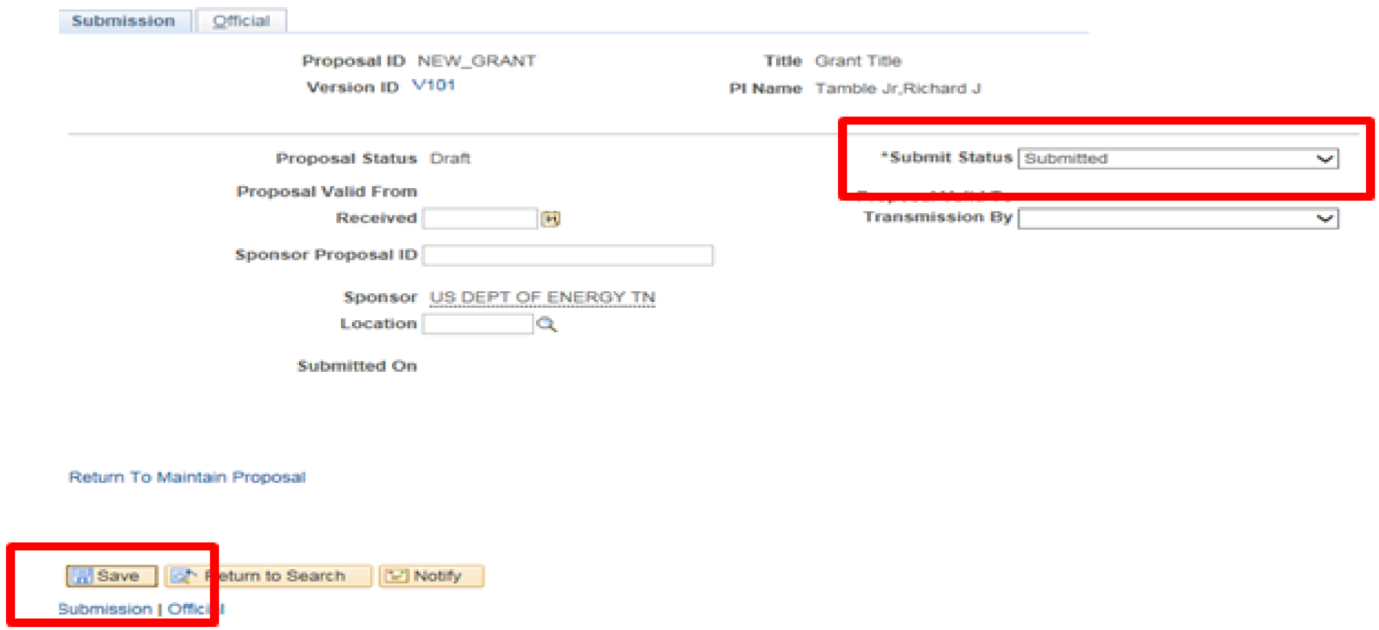
- Navigation:
  - ➢ FSCM> Grants> Proposals> Submit Proposal.
- Enter Business Unit and select the Proposal that needs to be submitted.



- To submit the Proposal, change the Submit Status from "Not Submitted" to "Submitted" and click Save.

Creating a New Proposal through the Proposal Method
1st Review of Submitted Proposal

- Once submitted, a submitted date is populated to the page. Click on the Notify button to send an email to the appropriate agency personnel that the Proposal has been submitted and needs to be generated. *Use the Review Checklist, Attachment 3B, before "Generate the Award" is done.*



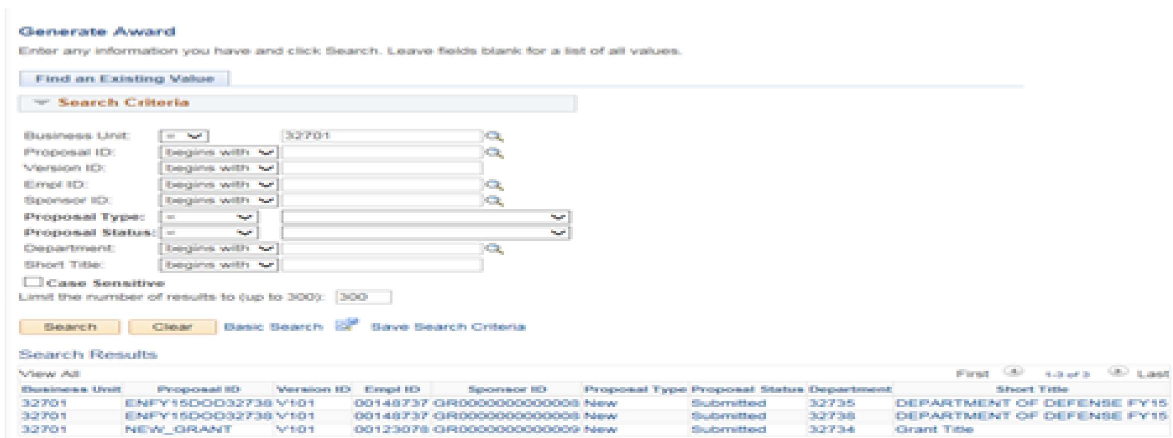
Once a Proposal is "submitted", it is ready to be "generated." When in the "submitted" status, changes can still be made if moved back to "not submitted" status and saved. If changes were made, it would be necessary to go through the "Proposal Submission" process again.

Creating a New Proposal through the Proposal Method
Generate the Award

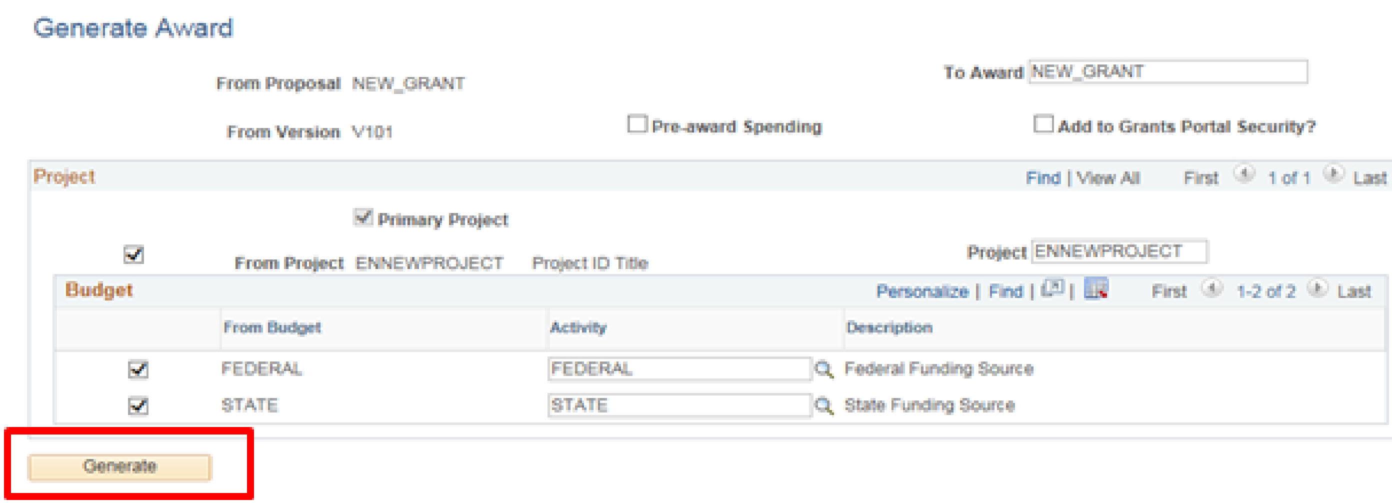
Section 3.1.3 - Generate the Award

Generating an Award translates the Proposal to the Customer (revenue) Contract.

- Navigation:
  - ➢ FSCM>Grants>Proposals>Generate Award.
- Enter Business Unit and click Search.
- Select the Proposal to be generated.



Creating a New Proposal through the Proposal Method
Generate the Award



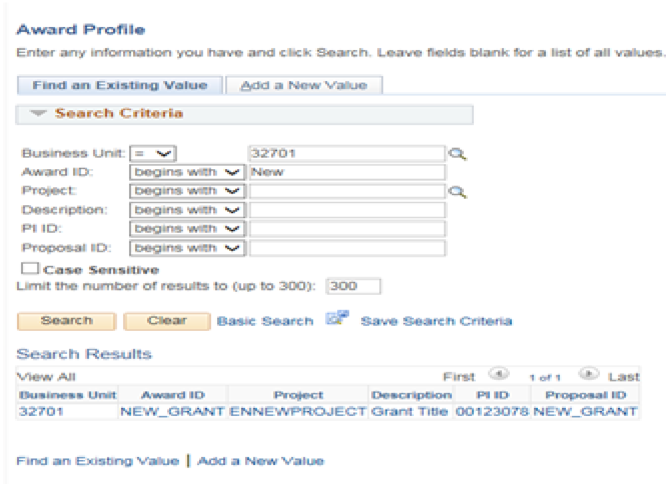
- Click View All to see additional Project IDs and Activity(s). If a Project ID has been created but does NOT need to be generated for the award, uncheck the "From Project" box and that Project ID will not generate for the Award.
- A "Primary" Project ID has to exist in order to generate.
- Once generated, a Proposal cannot be changed.

Creating a New Proposal through the Proposal Method
Update the Award Profile

Section 3.1.4 - Update Award Profile

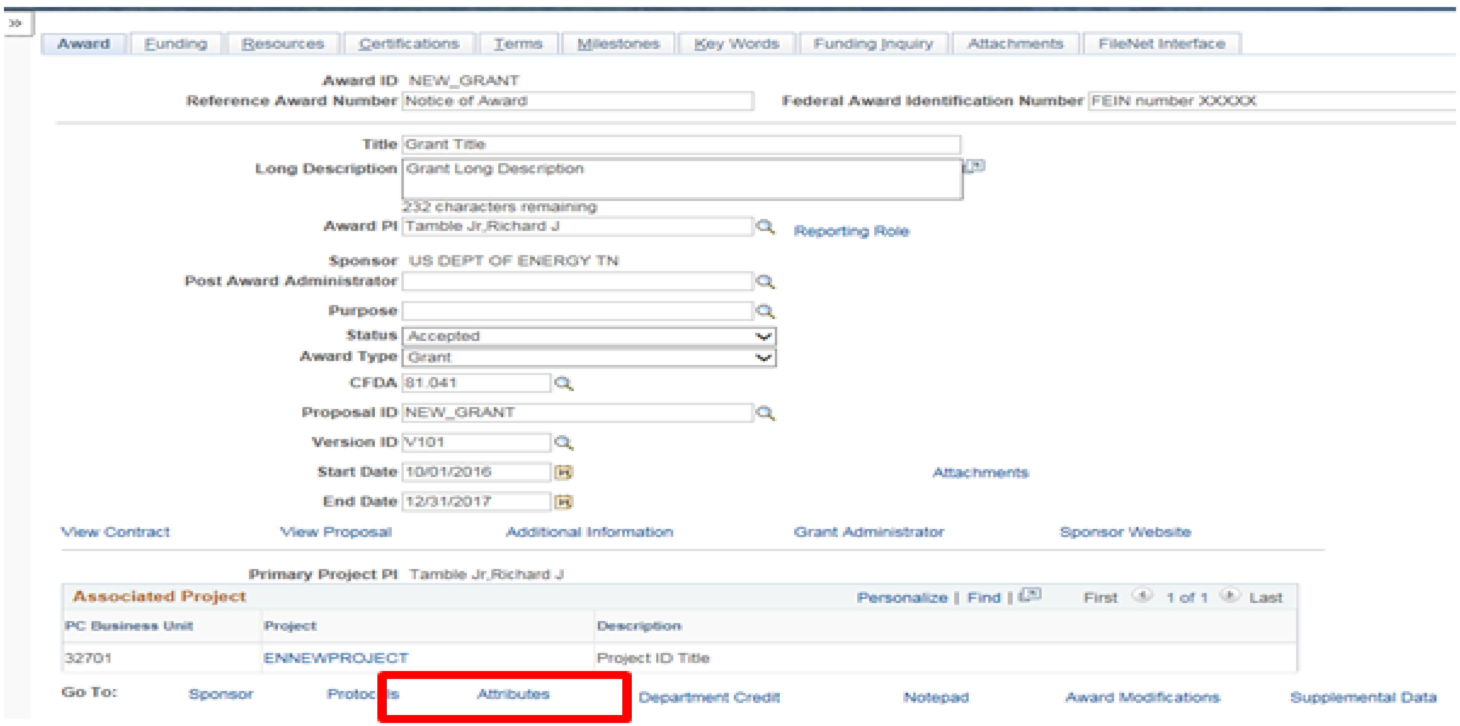
The Award Profile houses the Attributes associated to the Grant Award (reference Part 2) and the documentation associated to the Grant Award/Customer (revenue) Contract.

- Navigation:
  - ➢ FSCM>Grants>Awards>Award Profile.
- Enter Business Unit and Award ID and click on Search.
- Select the desired Award ID.



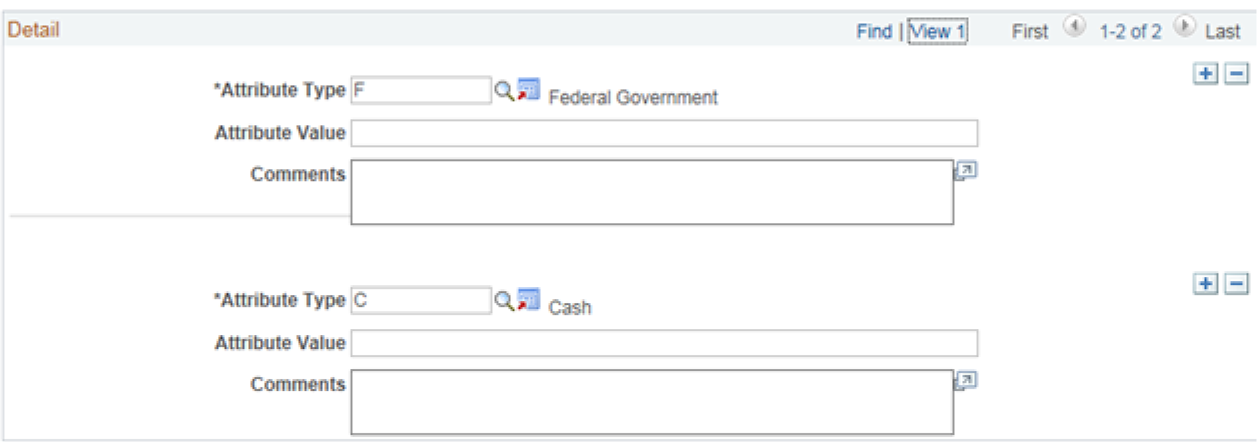
Creating a New Proposal through the Proposal Method
Update the Award Profile

- Click on the Attributes hyperlink at the bottom.



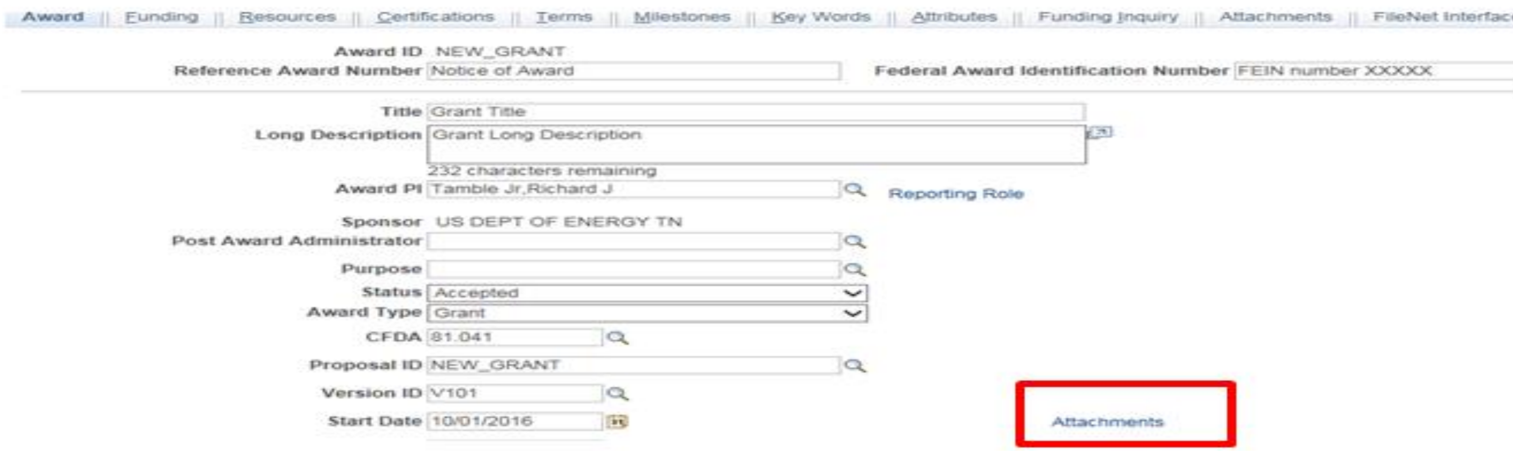
Creating a New Proposal through the Proposal Method
Update the Award Profile

- Click on the blue plus sign to add needed Attributes.
- Click on the lookup icon to the right of the Attribute Type and select the Attribute(s) needed for SEFA reporting. See separate Division of Accounts SEFA reporting instructions.
- Click on View All to see Attributes
- Click Save.

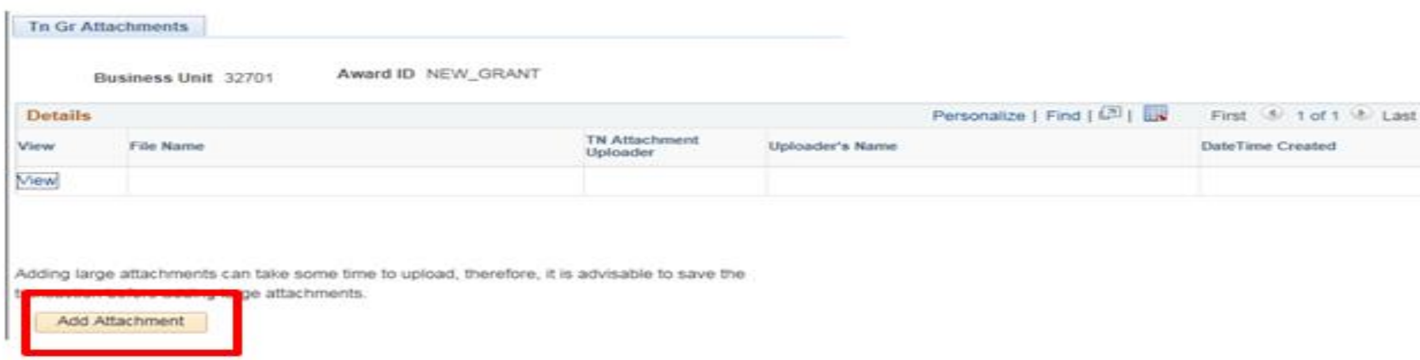


Creating a New Proposal through the Proposal Method
Update the Award Profile

- Click on the Award tab and click the Attachments link.



- Click on the Add Attachment button.

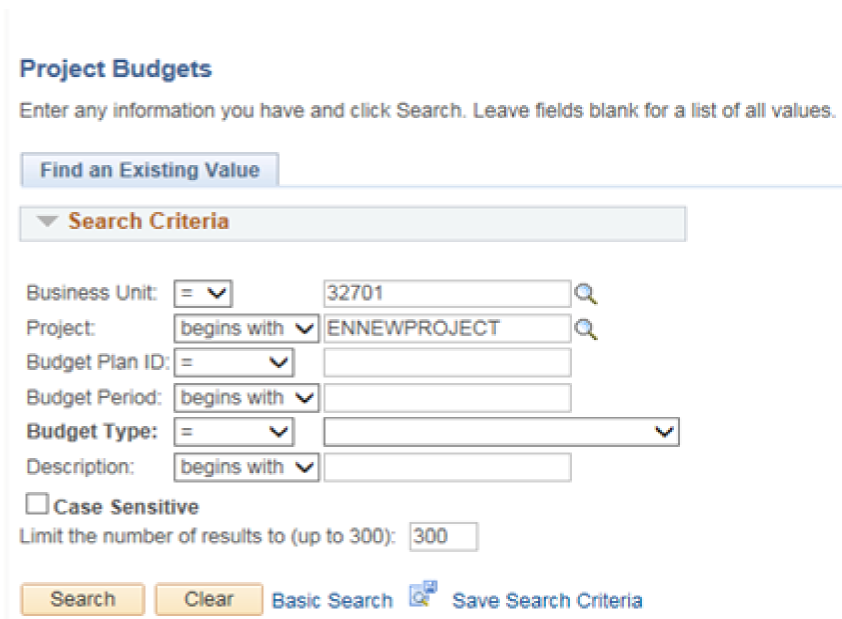


Creating a New Proposal through the Proposal Method
Finalize Project Budget

Section 3.1.5 - Finalize Project Budget

- Navigation:
  - ➢ FSCM>Grants>Awards>Project Budgets.

- Enter Business Unit and Project ID and click on Search.

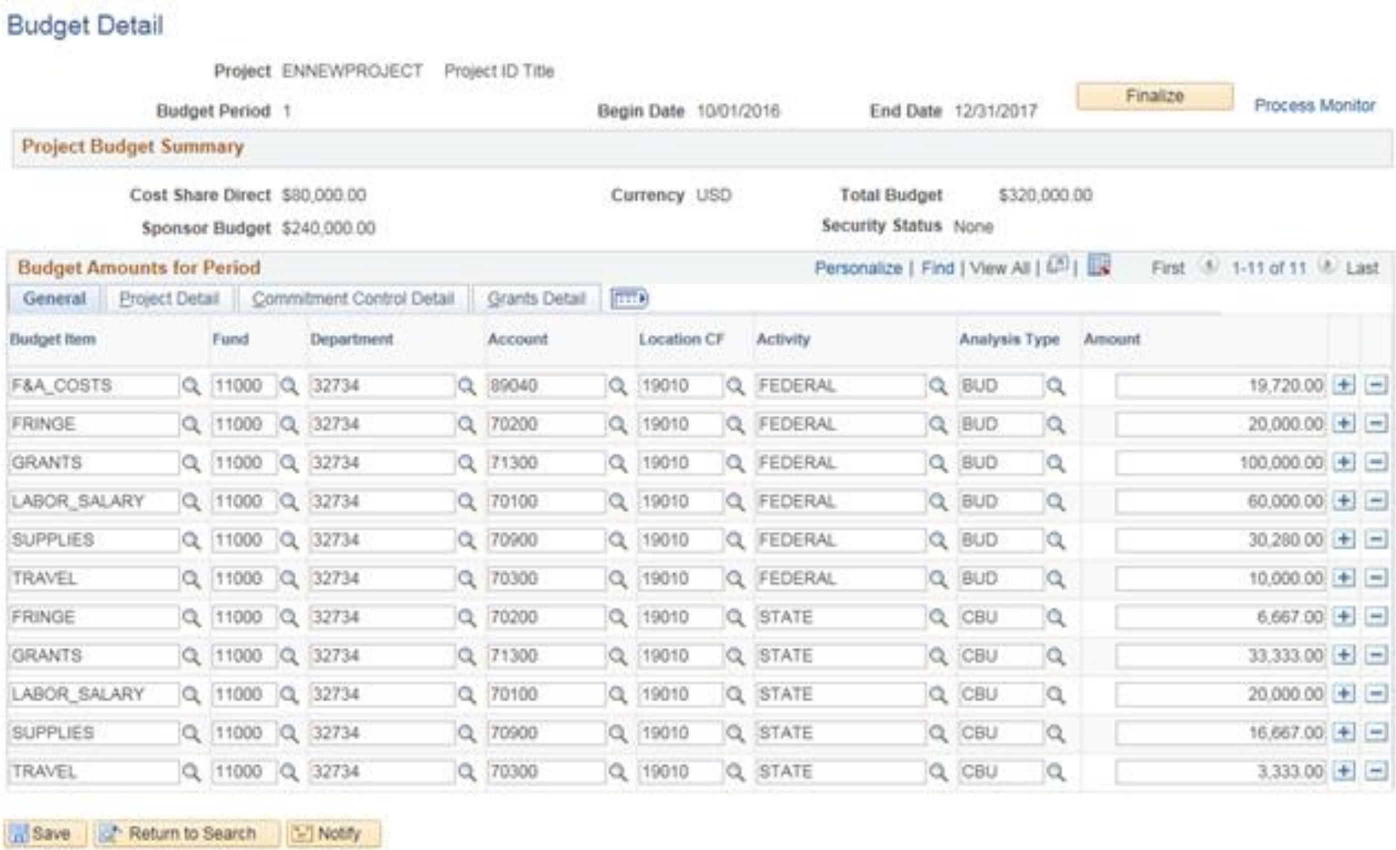


Creating a New Proposal through the Proposal Method
Finalize Project Budget

- The Budget Item, Fund, Department (5 digit), Account (5 digit), Location CF, Activity, Analysis Type and Amount are all required fields and will default into the budget. All should be reviewed.
- The most common required change is the Fund. For example, if the Business Unit/Agency has multiple funds, the Fund will need to be changed since only one Fund value defaults. If revisions are needed after the budget is finalized, corrections should be made by adding lines and finalizing again and then subtracting lines and finalizing another time.
- An un-finalized budget has open boxes, not greyed out as they would appear when finalized.

Note: The following screen shots reflect a smaller personalized view of the Project ID's budget. See separate document on Personalizing the Project Budget.

Creating a New Proposal through the Proposal Method
Finalize Project Budget



Budget Detail

Project ENNEWPROJECT Project ID Title

Budget Period 1 Begin Date 10/01/2016 End Date 12/31/2017 Finalize Process Monitor

Project Budget Summary

Cost Share Direct $80,000.00 Currency USD Total Budget $320,000.00

Sponsor Budget $240,000.00 Security Status None

Budget Amounts for Period — Personalize | Find | View All | First 1-11 of 11 Last

General | Project Detail | Commitment Control Detail | Grants Detail

Budget Item	Fund	Department	Account	Location CF	Activity	Analysis Type	Amount
F&A_COSTS	11000	32734	89040	19010	FEDERAL	BUD	19,720.00
FRINGE	11000	32734	70200	19010	FEDERAL	BUD	20,000.00
GRANTS	11000	32734	71300	19010	FEDERAL	BUD	100,000.00
LABOR_SALARY	11000	32734	70100	19010	FEDERAL	BUD	60,000.00
SUPPLIES	11000	32734	70900	19010	FEDERAL	BUD	30,280.00
TRAVEL	11000	32734	70300	19010	FEDERAL	BUD	10,000.00
FRINGE	11000	32734	70200	19010	STATE	CBU	6,667.00
GRANTS	11000	32734	71300	19010	STATE	CBU	33,333.00
LABOR_SALARY	11000	32734	70100	19010	STATE	CBU	20,000.00
SUPPLIES	11000	32734	70900	19010	STATE	CBU	16,667.00
TRAVEL	11000	32734	70300	19010	STATE	CBU	3,333.00

Save | Return to Search | Notify

Creating a New Proposal through the Proposal Method
Finalize Project Budget

- Click on the Grants Detail tab to see which lines have been Cost Shared – note the Cost Sharing box is checked.

Budget Detail

Project ENNEWPROJECT Project ID Title

Budget Period 1 **Begin Date** 10/01/2016 **End Date** 12/31/2017

Finalize

Process Monitor

Project Budget Summary

Cost Share Direct $80,000.00 **Currency** USD **Total Budget** $320,000.00

Sponsor Budget $240,000.00 **Security Status** None

Budget Amounts for Period

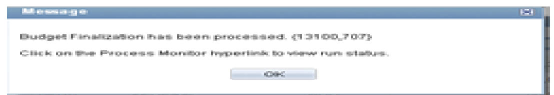
Personalize | Find | View All | First 1-11 of 11 Last

General | Project Detail | Commitment Control Detail | Grants Detail

Budget Item	Fund	Department	Account	Location CF	Activity	Analysis Type	Facilities and Administration	Cost Sharing
F&A_COSTS	11000	32734	89040	19010	FEDERAL	BUD	☑	☐
FRINGE	11000	32734	70200	19010	FEDERAL	BUD	☐	☐
GRANTS	11000	32734	71300	19010	FEDERAL	BUD	☐	☐
LABOR_SALARY	11000	32734	70100	19010	FEDERAL	BUD	☐	☐
SUPPLIES	11000	32734	70900	19010	FEDERAL	BUD	☐	☐
TRAVEL	11000	32734	70300	19010	FEDERAL	BUD	☐	☐
FRINGE	11000	32734	70200	19010	STATE	CBU	☐	☑
GRANTS	11000	32734	71300	19010	STATE	CBU	☐	☑
LABOR_SALARY	11000	32734	70100	19010	STATE	CBU	☐	☑
SUPPLIES	11000	32734	70900	19010	STATE	CBU	☐	☑
TRAVEL	11000	32734	70300	19010	STATE	CBU	☐	☑

Creating a New Proposal through the Proposal Method
Finalize Project Budget

- Click Finalize and this message will appear. Click OK.



- Click on Process Monitor hyperlink and Refresh until Run Status is Success and Distribution Status is posted.
- Click on the Details hyperlink.

Process List — Personalize | Find | View All | First 1-12 of 12 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	23947851		Application Engine	PC_WRAPPER	maryl0117001	03/31/2016 3:21:54PM CDT	Success	Posted	Details

- Click on the Message Log hyperlink.

Request Created On	03/31/2016 3:21:54PM CDT	Parameters	Transfer
Run Anytime After	03/31/2016 3:21:54PM CDT	Message Log	View Locks
Began Process At	03/31/2016 3:22:14PM CDT	Batch Timings	
Ended Process At	03/31/2016 3:24:17PM CDT	View Log/Trace	

- Click on the "Message Log" hyperlink, click View All and verify the number of Row(s) Edited with No Errors and the number of Row(s) Loaded equal. You may see a lot of other warnings which can be ignored for budget finalization purposes. If there are errors in the budget creation, please contract Division of Accounts Grant Accounting Group.

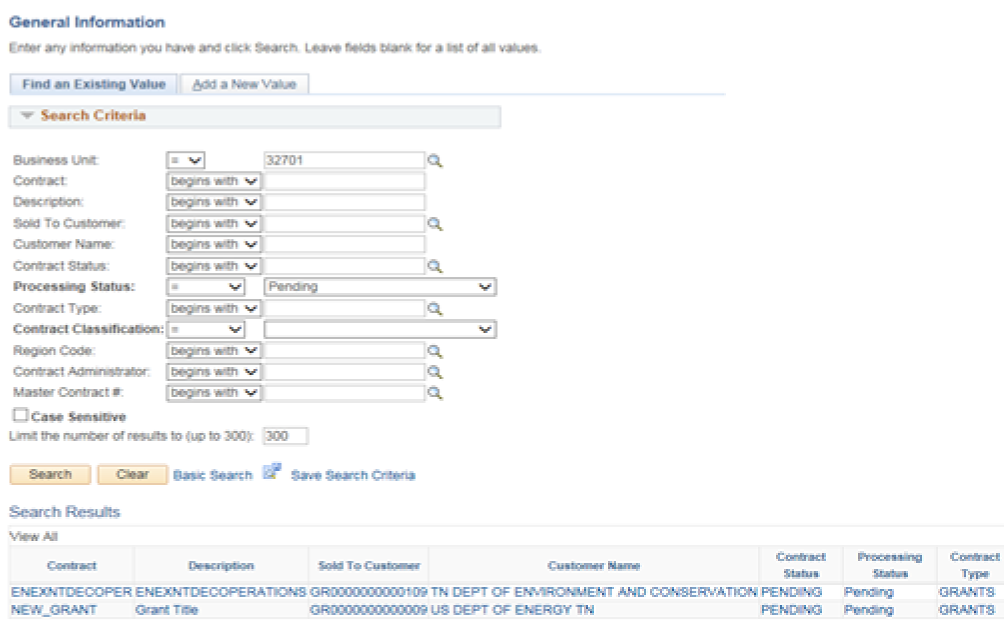
10	3:24:03PM	0 Row(s) were Edited with Errors	Explain
10	3:24:03PM	11 Row(s) were Edited with No Errors	Explain
10	3:24:03PM	11 Row(s) were Loaded	Explain

Department of Finance & Administration | Division of Accounts

Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

Section 3.1.6 - Customer (revenue) Contract Adjustments and Activation

- Navigation:
  - FSCM>Customer Contracts> Create and Amend> General Information.


General Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Business Unit: = 32701
Contract: begins with
Description: begins with
Sold To Customer: begins with
Customer Name: begins with
Contract Status: begins with
Processing Status: = Pending
Contract Type: begins with
Contract Classification: =
Region Code: begins with
Contract Administrator: begins with
Master Contract #: begins with

Case Sensitive

Limit the number of results to (up to 300): 300

Search | Clear | Basic Search | Save Search Criteria

Search Results

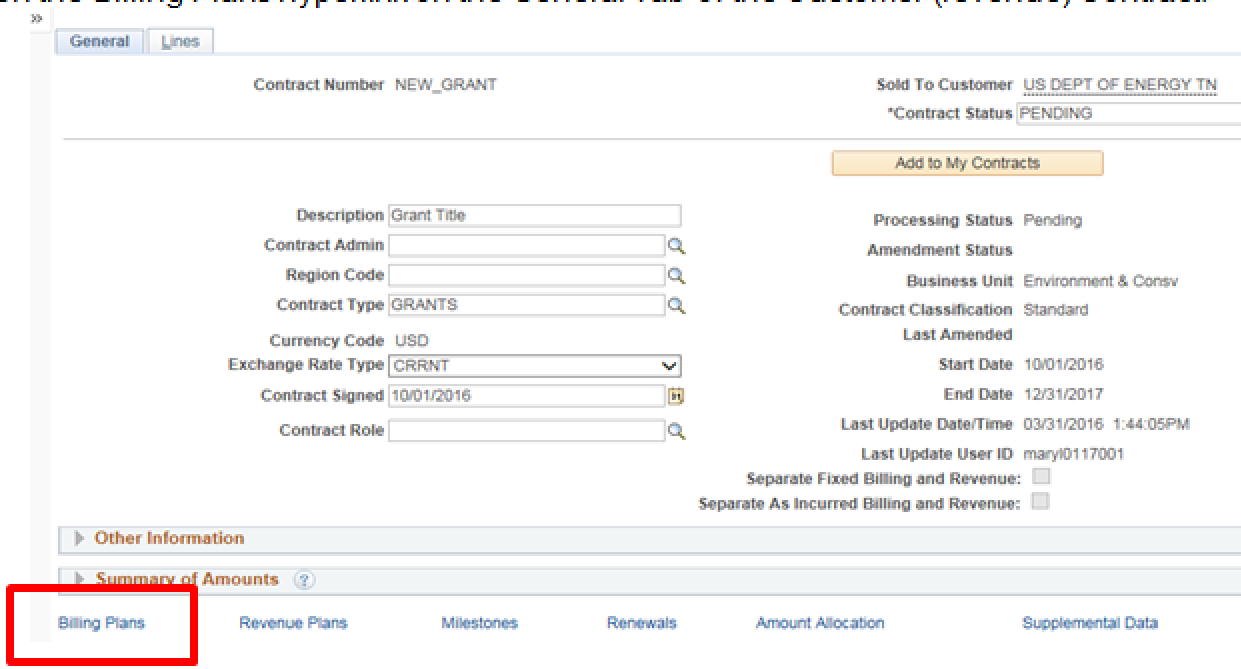
View All

Contract	Description	Sold To Customer	Customer Name	Contract Status	Processing Status	Contract Type
ENEXNTDECOPER	ENEXNTDECOPERATIONS	GR0000000000109	TN DEPT OF ENVIRONMENT AND CONSERVATION	PENDING	Pending	GRANTS
NEW_GRANT	Grant Title	GR0000000000009	US DEPT OF ENERGY TN	PENDING	Pending	GRANTS

- Type in Contract name or Search by “Processing Status” (choose “Pending” from the dropdown) on the Find Existing Value tab.

Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

- Select the Customer (revenue) Contract requiring completion.
- Click on the Billing Plans hyperlink on the General Tab of the Customer (revenue) Contract.



Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

- Click on the Plan "B101" hyperlink on the Assign Billing Plan page.


Assign Billing Plan

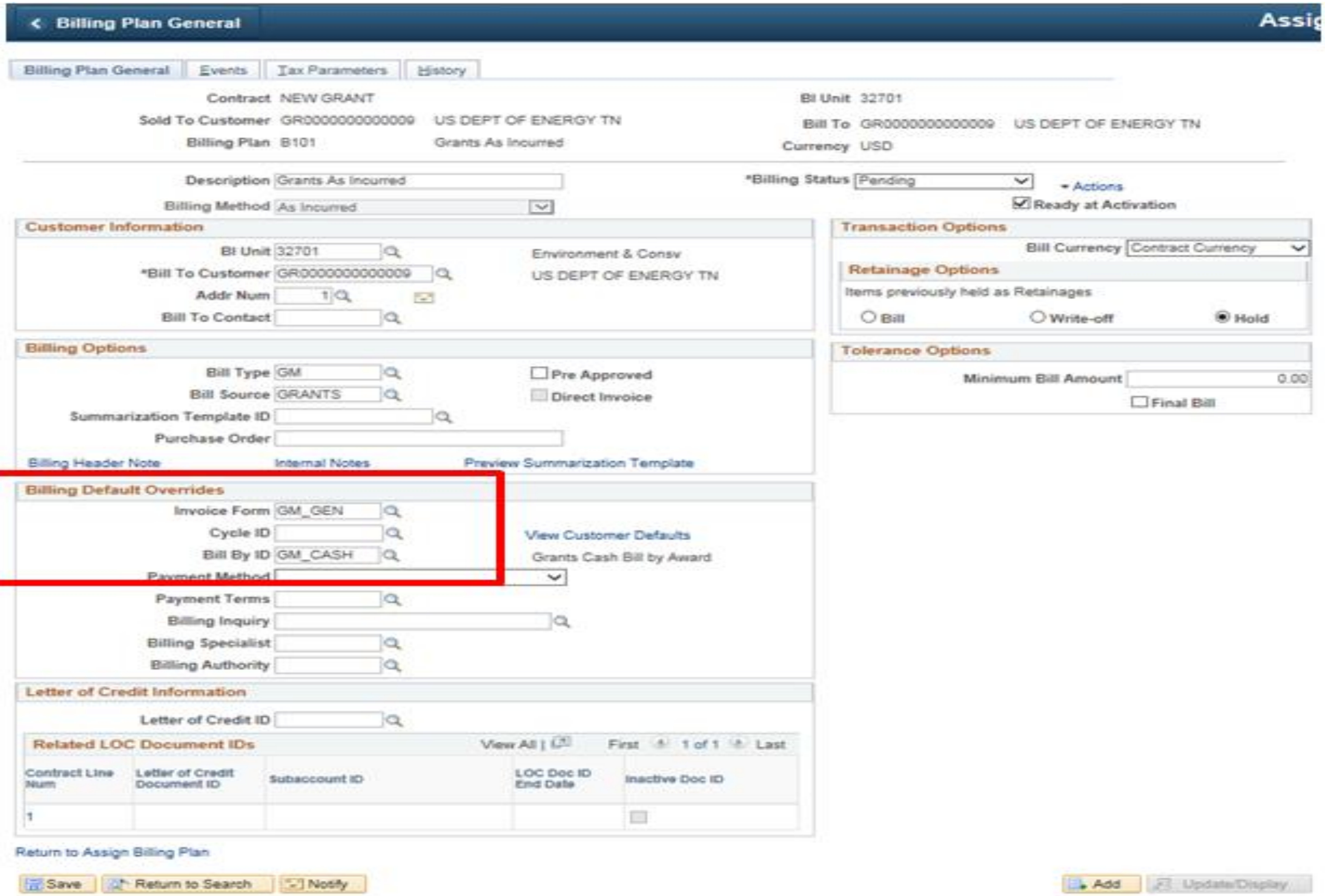
Contract NEW_GRANT Grant Title
Sold To Customer US DEPT OF ENERGY TN

Contract Lines to be Assigned / Unassigned

	Line	Product	Line Description	Billing Amount	Price Type	Plan	Plan Description
☐	1	AS_INCURRED	As Incurred		Rate	B101	Grants As Incurred

- In the Billing Defaults Overrides section:
  - ➢ Enter the Invoice Form: "GM_GEN"
  - ➢ Enter the Bill by ID: "GM_CASH"
- Leave all other fields on this page as defaulted in or blank. The Billing Plan will become "Ready" when the Customer (revenue) Contract status is made "Active."

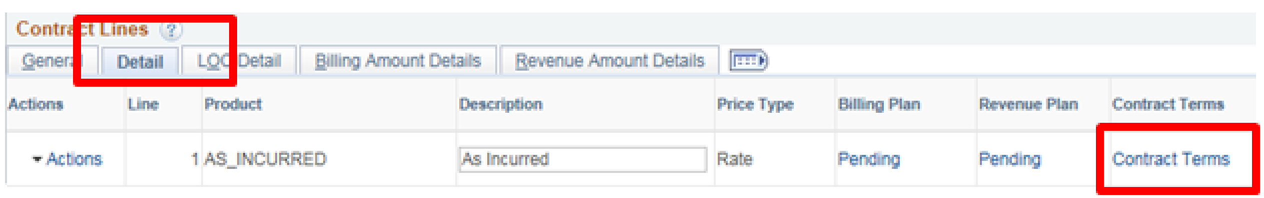
Creating a New Proposal through the Proposal Method
Customer Contract Adjustments and Activation



Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

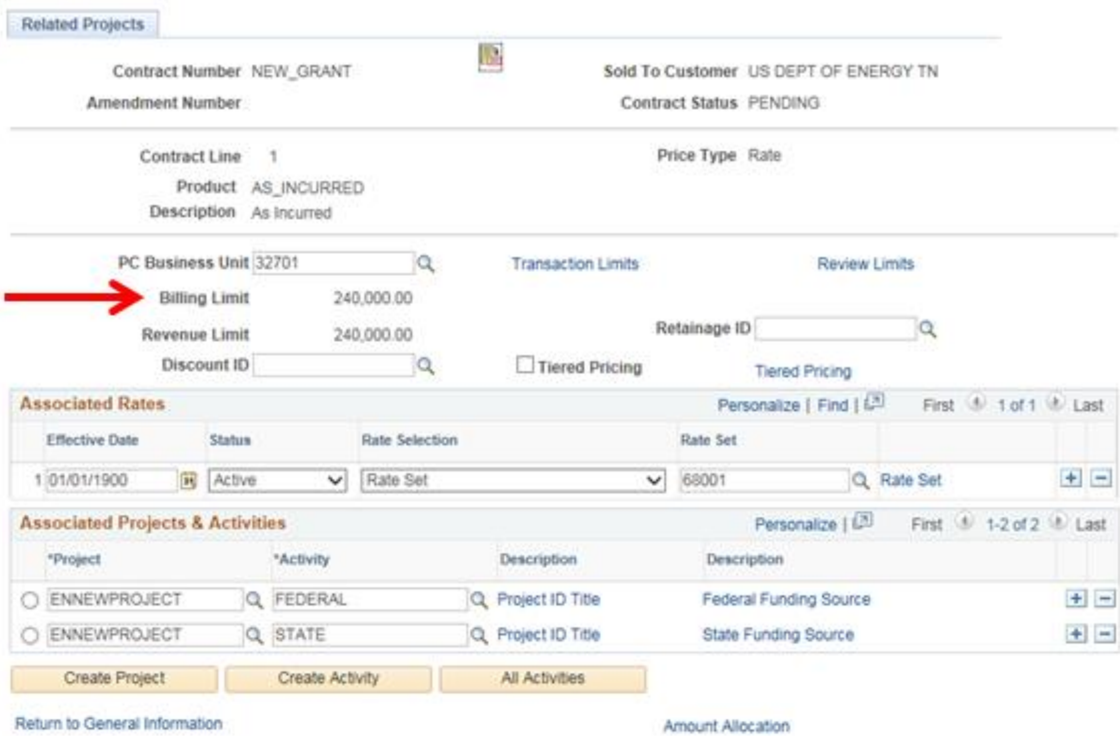
- Click Save.
- Click the "Return to Assign Billing Plan" hyperlink at the bottom.
- Click the "Return to General Information" hyperlink at the bottom.
- Review and make changes needed to the Billing Limit and Accounting Rate Set.
- Click on the Lines tab.

- Click on the "Detail" tab in the Contract Lines section.
- Click on the "Contract Terms" hyperlink.



Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

- When reviewing the Related Projects page, the Project ID and Activities are both reflected on the Contract; however, the Billing Limit should only reflect the amount due from the Sponsor/Customer of the Grant/Contract.



Related Projects

Contract Number NEW_GRANT
Amendment Number
Sold To Customer US DEPT OF ENERGY TN
Contract Status PENDING

Contract Line 1
Product AS_INCURRED
Description As Incurred
Price Type Rate

PC Business Unit 32701
Transaction Limits
Review Limits
Billing Limit 240,000.00
Revenue Limit 240,000.00
Retainage ID
Discount ID
Tiered Pricing
Tiered Pricing

Associated Rates — Personalize | Find | First 1 of 1 Last

	Effective Date	Status	Rate Selection	Rate Set	
1	01/01/1900	Active	Rate Set	68001	Rate Set

Associated Projects & Activities — Personalize | First 1-2 of 2 Last

*Project	*Activity	Description	Description
ENNEWPROJECT	FEDERAL	Project ID Title	Federal Funding Source
ENNEWPROJECT	STATE	Project ID Title	State Funding Source

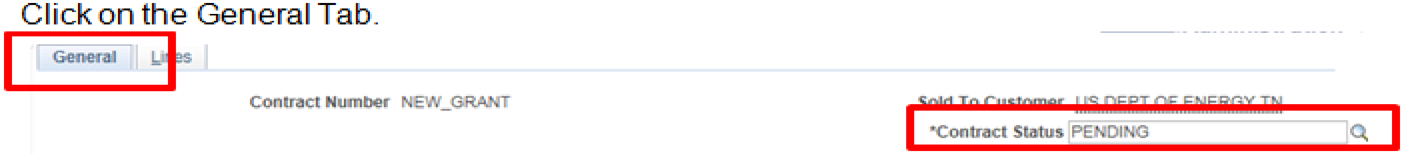
Create Project | Create Activity | All Activities

Return to General Information
Amount Allocation

Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

- The Federal Rate set (68001) will default as the Associated Rates, and the Effective Date defaults as 01/01/1900, this should always be changed to the start date of the Grant. In order to change the Effective Date or the Rate Set, a new line must be added.
- To change the Effective Date, click the blue plus sign next to the Rate Set. The added row will be on the top and will default with the current date as the Effective Date, but this should be changed to the official start date of the Grant.
- Change the Rate Set from 68001 (Federal) if a different Rate Set is needed.

- Click on Save.
- Click on the “Return to General Information” hyperlink.
- Click on the General Tab.



- Click the lookup icon to the right of Contract (revenue) Status and change the status from “Pending” to “Active.”

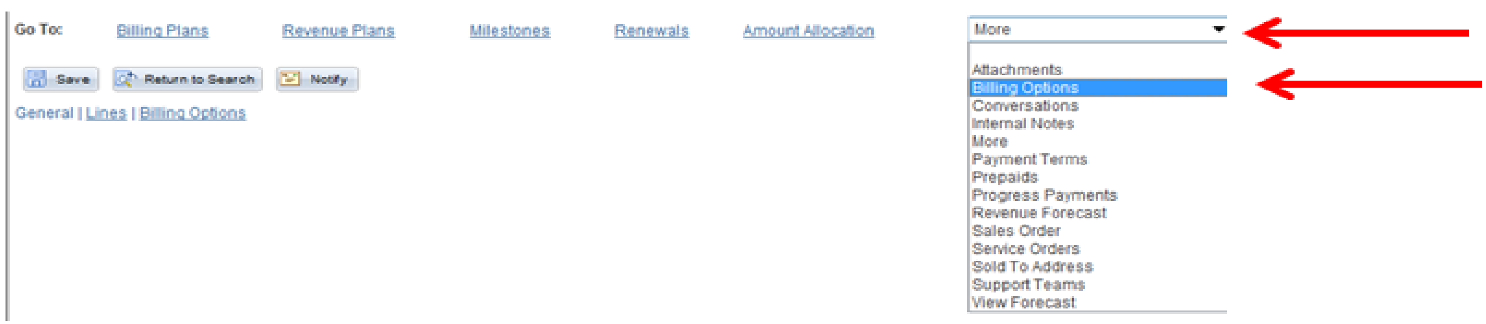
Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

Note: When changing the Customer (revenue) Contract status, the following error message may appear, "A Letter of Credit Reference ID is required at the Contract Line level when the Method of Payment is set to "Letter of Credit"". Follow these supplemental steps.

- Click OK in the message.

- Click "More" in the lower right hand corner of the General Tab for the Customer (revenue) Contract next to Amount Allocation.

- Click on dropdown to the right of "More" and select Billing Options.



Creating a New Proposal through the Proposal Method
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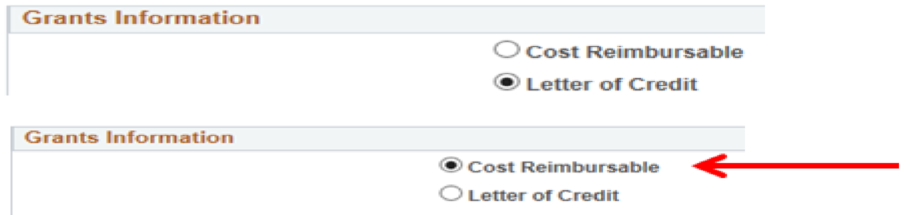
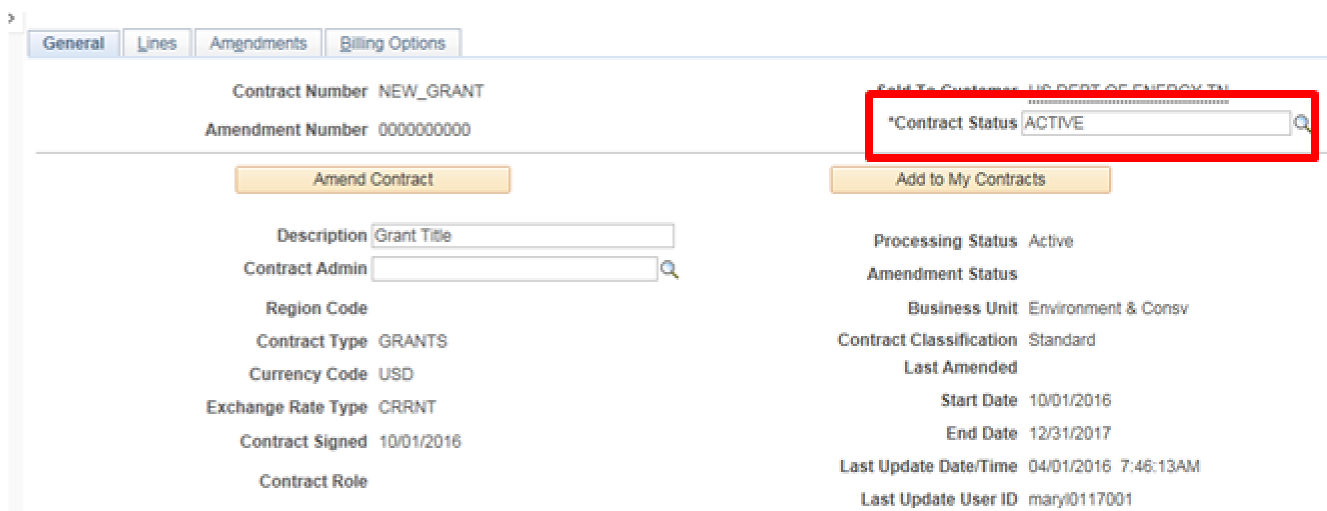
- Scroll down and change the radio button from Letter of Credit to Cost Reimbursable and save.



- Click back on the General Tab and change the Contract Status from "Pending" to "Active."



Creating a New Proposal through the Proposal Method
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Expenditures can now be incurred on the Grant/Award, and billing is able to be processed. If expenditures occurred before the Customer (revenue) Contract was made active (while in a pending state), the transactions would need to be re-priced by the Edison Grants team via an Edison Help Desk ticket.