

Oracle® Grants Proposal

Implementation Guide

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Oracle Grants Proposal Implementation Guide, Release 11i

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Preface

Intended Audience

Welcome to Release 11i of the *Oracle Grants Proposal Implementation Guide*.

See Related Documents on page x for more Oracle Applications product information.

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Related Documents

Using Oracle HRMS - The Fundamentals

This user guide explains how to setup and use enterprise modeling, organization management, and cost analysis. It also includes information about defining payrolls.

Managing People Using Oracle HRMS

Use this guide to find out about entering employees. Use this guide to learn about all aspects of managing your workforce. This includes how to represent your workforce on your application, recruiting new employees and developing their careers, and also defining and managing budgets.

Oracle Public Sector Financials Documentation

Information about public sector functionality is documented in the user guides of core Financial products. For information about public sector functionality, refer to these guides:

- Oracle General Ledger User Guide
- Oracle Purchasing User's Guide
- Oracle Receivables User Guide
- Oracle Payables User Guide

Oracle Receivables User Guide

Use this user guide to learn how to implement flexible address formats for different countries. You can use flexible address formats in the suppliers, customers, banks, invoices, and payments windows in both Oracle Payables and Oracle Receivables. This user guide also explains how to set up your system, create transactions, and run reports in Oracle Receivables.

Oracle Grants Accounting User's Guide

Use this guide to learn how to track grants and funded projects from inception to final reporting, including multi-funded projects and the required compliance terms and conditions by award.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage processing.

Oracle Workflow Administrator's Guide

This guide explains how to administer Oracle Workflow. The guide explains how to implement Oracle Workflow for your site, and how to use the Oracle Workflow home page and the Workflow Monitor to administer or view the status of a workflow process. The guide also describes the administrative SQL scripts included with Oracle Workflow.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Workflow User's Guide

This guide explains how to use Oracle Workflow and the Oracle Workflow home page, including how a user can view and act on a workflow notification, and how to use the Workflow Monitor to administer or view the status of a workflow process.

Oracle Workflow API Reference

This guide explains how to understand and use Oracle Workflow APIs. The guide contains a detailed description of all the APIs in Oracle Workflow.

Oracle eTechnical Reference Manuals

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

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle **STRONGLY RECOMMENDS** that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

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

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

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of

who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Process Overview

Oracle Grants Proposal

Oracle Grants Proposal lets organizations track grants proposals from project inception through proposal submission to a sponsor. Grants Proposal also tracks the creation of an award as well as an award budget in Grants Accounting where grant applicants can maintain accounting as a part of a grant reporting requirement.

Installing, implementing, and using a single proposal system eliminates data entry duplication and improves the proposal coordination. Grants Proposal increases the efficiency of creating a proposal, while minimizing human error. In addition, Grants Proposal maintains proposal access security and lets you electronically route proposals for review and approval using Oracle Workflow.

Oracle Grants Proposal Mini-pack 11i.IGW.G operates from a grant applicant perspective, referred to as "Internal Grantee".

Internal Grantee

In the Internal Grantee mode of Grants Proposal, the grantee creates a grants proposal in Grants Proposal and submits the proposal to any grantor organization for funding consideration.

Grants Proposal Business Process Flow

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

The process for developing a grant proposal includes:

- **Creating Proposals** - You can create a new proposal by entering a set of required fields and saving the record. Alternatively, you can create a new proposal by copying an existing proposal.
- **Entering Proposal Information** - Once a proposal is created, you can enter detailed proposal information, which includes basic proposal information such as detailed data about the grantors, your personnel and their roles, protocols, and assurances. Additional data entered includes project narratives and keywords.
- **Defining Proposal Budgets** - At any time while you create your proposal, you can define proposal budgets. You can create budgets for a single or multiple budget periods. You can enter proposal budgets at the period level or at the budget line

level. If desired, you can choose whether to apply overhead, employee benefits, and inflation rates to the proposal budget.

- **Maintaining a Checklist** - You indicate that a component in your proposal is complete by selecting the appropriate check boxes.
- **Submitting Proposals for Internal Approval** - Once a proposal is complete, you route the proposal to the internal approvers for review and approval.
- **Printing Proposal Forms** - You can print proposals on sponsor specified forms.
- **Accessing Proposals from Workflow** - You can access Workflow notifications by clicking the Worklist link in the Main menu. While reviewing a notification that requires approval, approvers can optionally click a link to view a proposal.
- **Submitting Proposals to Sponsors** - After a proposal is internally approved, the proposal is submitted to the appropriate sponsor as printed copies.
- **Recording Sponsor Action** - After a sponsor reviews a proposal, you can record the action taken by the sponsor, including whether or not the proposal is funded.
- **Creating Awards and Award Budgets in Grants Accounting** - After sponsors fund or anticipate funding proposals, you can use existing proposals and proposal budgets in Grants Proposal to create awards and award budgets in Grants Accounting for funds management.

Oracle Grants Proposal Setup Overview

Grants Proposal Setup Checklist

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

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

- Database Setup
- Oracle Applications System Administration
- Oracle Human Resource Management Systems (HRMS) for persons administration
- Oracle Public Sector Receivables for customer/grantor setup
- Oracle Grants Accounting (optional)

The table below shows the Grants Proposal setup checklist. You must complete all required setup steps in the following order.

Step Number	Setup Step	Step Type	Oracle Application
1.	Setup Database	Required	Database
2.	Specify Profile Option Levels	Required with defaults	System Administration
3.	Define Descriptive Flexfields	Optional	System Administration
4.	Create Locations	Required	HRMS
5.	Create Organizations	Required	HRMS
6.	Define Organization Hierarchies	Required	HRMS
7.	Define Jobs	Required	HRMS
8.	Enter Employee Information	Required	HRMS
9.	Define Customers/Grantors	Required	Receivables
10.	Set Up Grants Accounting	Optional	Grants Accounting
11.	Set Up Implementation Options	Required	Grants Proposal
12.	Set Up Proposal Roles	Required	Grants Proposal
13.	Set Up Budget	Required	Grants Proposal
14.	Set Up Questions	Required	Grants Proposal
15.	Set Up Organization Details	Required	Grants Proposal
16.	Set Up Person	Optional	Grants Proposal
17.	Set Up Organization	Optional	Grants Proposal
18.	Set Up Biographical Sketch	Required	Grants Proposal
19.	Set Up Keywords	Conditionally required	Grants Proposal

Grants Proposal Setup Steps

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

1. Set Up Database

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

2. Specify Profile Option Levels

Specify the common user profile options for Oracle Applications as part of Oracle Applications System Administration setup. There are four levels that a profile option can be set to: Site, Application, Responsibility, and User. Most profile options are seeded with default values at the site until the profile option is overridden at other levels.

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

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

The table below describes Grants Proposal profile option levels.

Feature	Profile Option Name	Site	Application	Responsibility	User
Month and day that a user's fiscal year starts	IGW: Fiscal Year Start Month and Day	x	x	x	x
Job key flexfield segment	IGW: Position Title Segment	x	x	x	x
Multiple organization environment	MO: Operating Unit	x		x	
Enable currency	ICX: Preferred Currency	x			x
Lets users see and modify any proposal, regardless of proposal status	IGW: Proposal Superuser	x	x	x	x

Set Up Profile Option Values

The table below describes Grants Proposal profile option values.

Profile Option Name	Value	Description
IGW: Fiscal Year Start Month and Day	Four digits	Use the MMDD format where M means month and D means day. For example, July 1 is specified as 0701.
IGW: Position Title Segment	Segment identifier	Job key flexfield segment in which job name, or position title, is implemented in HRMS.
MO: Operating Unit	Appropriate organization	Repeat profile option sequence for each additional organization. Note: Each organization that is linked to a particular responsibility appears on the Responsibilities menu. When logging in, users select the responsibility that corresponds to the appropriate organization. Associate each unique organization identifier with a responsibility.
ICX: Preferred Currency	Any currency	If the US dollar is enabled, users see USD for dollar amounts.
IGW: Proposal Superuser	No Access, View Only Proposal Access, Modify Proposal Access	
IGW: Proposal Installation Mode	Grantee logs into grantee's site and creates proposal	Only set at responsibility level and user level.

3. Define Descriptive Flexfields (Optional)

You can optionally define descriptive flexfields to appear in the Organization Details tab and the Unit Details tab of the Organization Details window.

Users can optionally define descriptive flexfields in Basic Information > Proposal tab > General subtab.

4. Create Locations

Locations are physical sites where employees work. Use the Location window in Grants Proposal to set up locations.

To use Grants Proposal without HRMS implemented, you must create locations.

For information about creating locations, see *Setting Up Locations, Using Oracle HRMS - The Fundamentals*

If HRMS is implemented, complete this step in Oracle HRMS.

5. Create Organizations

Organizations are internal to the submitting organization, such as departments.

To use Grants Proposal without HRMS implemented, create organizations in the Organization window in Grants Proposal.

If HRMS is implemented, complete this step in Oracle HRMS.

For information about creating organizations, see *Creating an Organization, Using Oracle HRMS - The Fundamentals*.

6. Define Organization Hierarchies

Organization hierarchies are organization structures or trees that show relationships between organizations or departments.

To use Grants Proposal without HRMS implemented, define organization hierarchies in the Organization Hierarchy window in Grants Proposal.

If HRMS is implemented, complete this step in Oracle HRMS.

For information about defining organization hierarchies, see *Creating Organization Hierarchies, Using Oracle HRMS - The Fundamentals*.

7. Define Jobs

Jobs are generic roles within an organization that are independent of any single organization. For example, generic jobs, such as "Manager" and "Consultant", occur in many organizations.

To use Grants Proposal without HRMS implemented, define jobs in the Job window in Grants Proposal.

If HRMS is implemented, this step is completed in Oracle HRMS.

For information about defining jobs, see *Defining a Job, Using Oracle HRMS - The Fundamentals*.

8. Enter Employee Information

You must enter information about your employees who either need access to the proposal or will work on the project.

To use Grants Proposal without HRMS implemented, enter employee information in the Enter Person window in Grants Proposal.

If HRMS is implemented, this step is completed in Oracle HRMS.

For information about entering employee information, see *Entering a New Person, Managing People Using Oracle HRMS*.

9. Define Customers/Grantors

Defining Customers/Grantors lets you track information about grant giving organizations. If Receivables is implemented, complete this step in Oracle Receivables.

Later, as grants are awarded, the same customer master is leveraged in Grants Accounting as sponsors need to be billed.

To use Grants Proposal without Receivables implemented, define customers, known as sponsors in Grants Proposal, in the Customers window in Grants Proposal.

For information about defining customers, see *Entering Parties and Customer Accounts, Oracle Public Sector Receivables User's Guide*.

10. Set Up Grants Accounting (Optional)

If you want to leverage proposal information in your accounting system, you can optionally set up Grants Accounting.

For information about setting up Grants Accounting, see Oracle Grants Accounting Setup Overview, *Oracle Grants Accounting User's Guide*.

11. Set Up Implementation Options

Complete implementation options to specify how to assign a unique number to a proposal.

To set up implementation options, see Implementation Options Setup, page 3- 1 .

12. Set Up Proposal Roles

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

13. Set Up Budget

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

To set up a budget, see Budget Setup, page 5- 1 .

14. Set Up Questions/Assurances

Set up questions are related to assurance, compliance, and certification issues. Sponsors often have a stock set of questions or assurances that must be included in the proposal before funding is considered. Three types of questions are included in the setup: organization specific, proposal specific, and individual specific.

To set up questions, see Questions Setup, page 6- 1 .

15. Set Up Organization Details

An Organization detail is information specific to your organization that is required by various sponsors when you submit proposals. This organization information is proposal specific and typically not maintained in the Oracle Human Resource Management Systems database.

To set up organization details, see Organization Details Setup, page 7- 1 .

16. Set Up Person (Optional)

External persons are user-defined persons in Grants Proposal that do not currently exist in your Human Resources application.

To set up external persons, see the *Grants Proposal user guide*.

17. Set Up Organization (Optional)

External organizations are user-defined organizations in Grants Proposal that do not currently exist in your Human Resources application.

To set up external organizations, see the *Grants Proposal user guide*.

18. Set Up Biographical Sketch

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

To set up biographical sketch information, see the *Grants Proposal user guide*.

19. Set Up Keywords (Conditionally Required)

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

To set up keywords, see *Keywords Setup*, page 9- 1 .

Implementation Options Setup

Proposal Numbering and Owning Organization

Implementation options is a setup procedure that specifies:

- A method of assigning a unique number to a proposal.
- The proposal owning organizations.

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

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

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

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

Proposal Numbering

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

Proposal Owning Organization

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

Setting Up Implementation Options

The screenshot shows a window titled "Implementation Options (Progress Master)" with a sub-tab "Proposal Setup". The window is divided into two main sections. The top section, "Proposal Numbering", contains a "Method" group with two radio buttons: "Manual" (unselected) and "Automatic" (selected). To the right of this is a "Next Number" field containing the value "10012". The bottom section, "Proposal Owning Organization", contains three text input fields: "Organization Hierarchy", "Version", and "Start Organization", all of which are currently empty.

To set up implementation options:

1. Navigate to the Implementation Options window.
2. In the Proposal Numbering Method region, select either the Manual or Automatic radio button.
3. If you select the Manual radio button, select either the Alphanumeric or Numeric radio button in the Type region and continue to step 5.
4. If you select the Automatic radio button, enter the number that you want to automatically assign to the next proposal in the Next Number field.
5. In the Organization Hierarchy field, select an organization hierarchy name that coordinates and administers the proposal development tasks.
6. In the Version field, select a hierarchy version.
7. In the Start Organization field, select the starting organization in the hierarchy.

Proposal Roles Setup

Setup Proposal Roles

A proposal role is a user-defined functional title that is associated with system-defined proposal rights. Proposal roles and their associated rights restrict an individual's access to one or more functional areas of the proposal. Restricting access to different functional areas provides security on the proposal.

Proposal roles must be setup to correctly use Oracle Grants Proposal. An organization's Sponsored Research Office typically defines proposal roles.

Oracle Grants Proposal provides security implementation using Application Data Security. See Data Security in the *Oracle Applications System Administrator's Guide* for more information.

Object Functions and Function Sets are seeded by Oracle Grants Proposal to provide Proposal Rights and Proposal Roles. The customer can create additional Proposal Roles as needed using seeded Proposal Rights.

Note: All roles must include the correct "View Proposal". Without the correct "View Proposal", the user cannot view the contents of the proposal.

Seeded Proposal Rights

Users can assign one or more seeded proposal rights to a user-defined proposal role. A role is then assigned to one or more proposal team members by the Proposal Owner or the Proposal Manager. Assigning roles to proposal team members restricts their access to one or more proposal functions.

This table shows seeded proposal rights and associated descriptions in Grants Proposal.

Seeded Proposal Rights	Description
IGW: Modify Submission History Right	View, create, and update contents of the Submission History tab
IGW: View Award Right	View only the contents of the Award tab
IGW: Modify Award Right	View, create, and update contents of the Award tab
IGW: View Budget Right	View only the contents of the Budget tab
IGW: Modify Budget Right	View, create, and update contents of the Budget tab
IGW: Modify Checklist Right	View and update contents of the Checklist tab
IGW: Modify Personnel (All) Right	View, create, and update contents of the Personnel tab
IGW: Modify Personnel (Self) Right	Users can update these sections of their own personnel record: Other Support, Assurances, and Biographical Sketch. Users cannot update anyone else's personnel record.
IGW: View Proposal Right	View only the contents of the Basic Information, Grantors, Discussions, Personnel, Checklist, Submission History, and Security Roles tabs. View Proposal must be assigned to every role.
IGW: Modify Proposal Right	View, create, and update contents of the Basic Information, Grantors, Application Forms, Discussions and Proposal Contacts tabs.
IGW: Modify Security Roles Right	Assign Security Roles to self and other users
IGW: View Application Forms Right	Views and Prints the proposal forms
IGW: Submit Proposal for Approval Right	Submits proposal for internal approval

Seeded Proposal Roles

Grants Proposal supports the following seeded proposal roles.

- IGW: Proposal Owner Role
- IGW: Proposal Manager Role
- IGW: Proposal Signing Official Role
- IGW: Proposal Approver Role
- IGW: Proposal Budget Manager Role
- IGW: Proposal Budget Reviewer Role
- IGW: Proposal Viewer Role

Note: Modifying Seeded Roles

The following seeded roles are system assigned and should not be modified or deleted:

IGW: Proposal Owner Role

IGW: Proposal Manager Role

IGW: Proposal Signing Official Role

Roles that are in use in a proposal also cannot be deleted or modified. The rights that are associated with the seeded roles, however, can be modified or deleted.

IGW: Proposal Owner Role

The person who creates the proposal is automatically assigned the role of IGW: Proposal Owner Role. These proposal rights are included in this proposal role:

- IGW: Modify Submission History Right
- IGW: Modify Award Right
- IGW: Modify Budget Right
- IGW: Modify Checklist Right
- IGW: Modify Personnel (All) Right
- IGW: Modify Personnel (Self) Right
- IGW: Modify Proposal Right
- IGW: Modify Security Roles Right
- IGW: View Application Forms Right
- IGW: Submit Proposal for Approval Right
- IGW: View Proposal Right

IGW: Proposal Manager Role

The person specified as the proposal manager in the proposal is automatically assigned the role of IGW: Proposal Manager Role. These proposal rights are included in this proposal role:

- IGW: Modify Submission History Right
- IGW: Modify Award Right
- IGW: Modify Budget Right
- IGW: Modify Checklist Right
- IGW: Modify Personnel (All) Right
- IGW: Modify Personnel (Self) Right
- IGW: Modify Proposal Right
- IGW: Modify Security Roles Right
- IGW: View Application Forms Right
- IGW: Submit Proposal for Approval Right
- IGW: View Proposal Right

IGW: Proposal Signing Official Role

The person specified as the signing official in the proposal is automatically assigned the role of IGW: Signing Official Role. These proposal rights are included in this proposal role:

- IGW: Modify Submission History Right
- IGW: Modify Award Right
- IGW: Modify Budget Right
- IGW: Modify Checklist Right
- IGW: Modify Personnel (All) Right
- IGW: Modify Personnel (Self) Right
- IGW: Modify Proposal Right
- IGW: Modify Security Roles Right
- IGW: View Application Forms Right
- IGW: Submit Proposal for Approval Right
- IGW: View Proposal Right

IGW: Proposal Approver Role

These proposal rights are included in this proposal role:

- IGW: View Award Right
- IGW: View Budget Right
- IGW: View Proposal Right

IGW: Proposal Budget Manager Role

This proposal right is included in this proposal role:

- IGW: View Proposal Right

IGW: Proposal Budget Reviewer Role

These proposal rights are included in this proposal role:

- IGW: View Budget Right
- IGW: View Proposal Right

IGW: Proposal Viewer Role

These proposal rights are included in this proposal role:

- IGW: View Budget Right
- IGW: View Proposal Right

Proposal Role Example

This table shows an example of how the users can create proposal roles and assign one or more rights to a role.

Proposal Roles	Proposal Rights Assigned to Proposal Roles
IGW: Modify Personnel Role	IGW: Modify Personnel (All) Right + IGW: View Proposal Right
IGW: Budget Creator Role	IGW: Modify Budget Right + IGW: View Proposal Right

Setup Proposal Superuser Profile Option

Grants Proposal provides users with an IGW: Proposal Superuser profile option. You can set the profile option, IGW: Proposal Superuser at the site, application, responsibility, or user level.

IGW: Proposal Superuser has three values:

- **View Only Proposal Access** - The Superuser has view only access to all functional areas of all the proposal.
- **Modify Proposal Access** - The Superuser has modify access to all functional areas of all the proposals, regardless of the proposal status.
- **No Access** - Not a superuser. Access to proposals is governed by proposal roles granted to the user on the individual proposals.

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

Budget Setup

Budget and Rates

Grants Proposal lets users store rates, rates used for inflation and other adjustments as well as automatically adjust budgets based on these rates.

Organizations employ several types of cost rates for proposal budgets which are usually expressed in percentages and used to calculate indirect costs such as overhead. These cost rates are charged to sponsors to more accurately reflect the total cost of the project. Some cost rates are determined by the organization's fiscal policies and others are negotiated by the federal government.

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

Budget setup is used to perform the following tasks:

- Define rate classes
- Define rate types
- Define rates
- Assign expenditure categories to budget categories
- Assign expenditure categories to rate class and rate type pairs
- Define a budget hierarchy

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

Oracle Grants Proposal supplies you with three rate groupings. These system-defined rate groupings include:

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

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

- Modified Total Direct Costs (MTDC)
- Total Direct Costs (TDC)
- Salary and Wages (S&W)

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

Budget Setup Process

The complete budget setup for rates:

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

Seeded Rate Groupings

Seeded rate groupings provided by Oracle Grants Proposal includes:

- Overhead Rates
- Employee Benefits Rates
- Inflation Rates

Overhead Rates

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

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

Employee Benefits Rates

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

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

Inflation Rates

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

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

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

User-Defined Rate Classes

Examples of user-defined rate classes include:

- Modified total direct costs overhead rate
- Total direct costs overhead rate
- Salary and wages overhead rate

Modified Total Direct Costs Overhead Rate

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

Total Direct Costs Overhead Rate

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

Salary and Wages Overhead Rate

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

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

Defining Rate Classes and Rate Types

Rate Class	Rate Grouping	Overhead Type
Inflation Adjustment	Inflation	
Overhead	Overhead	Other

Rate Type
Inflation Adjustment

Rates

Prerequisite

If Grants Accounting is installed, you must define expenditure categories and expenditure types in the Grants Accounting Expenditure Types window.

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

To define rate classes and rate types:

1. Navigate to the Rate Classes and Types window.
2. Enter a unique title for the rate class.
3. Select a rate grouping that you want the rate assigned to.
4. Select the overhead type.
5. Enter a short description for this rate type.

Defining Rates

Activity Types	Fiscal Year	Location	Start Date	Rate
Community Programs	2003	Field Site	01-JUL-2002	4.00
Community Programs	2004	Field Site	01-JUL-2003	4.00
Community Programs	2005	Field Site	01-JUL-2004	4.00
Community Programs	2006	Field Site	01-JUL-2005	4.00
Community Programs	2007	Field Site	01-JUL-2006	4.00
Community Programs	2003	Office Site	01-JUL-2002	5.00
Community Programs	2004	Office Site	01-JUL-2003	5.00
Community Programs	2005	Office Site	01-JUL-2004	5.00
Community Programs	2006	Office Site	01-JUL-2005	5.00
Community Programs	2007	Office Site	01-JUL-2006	5.00

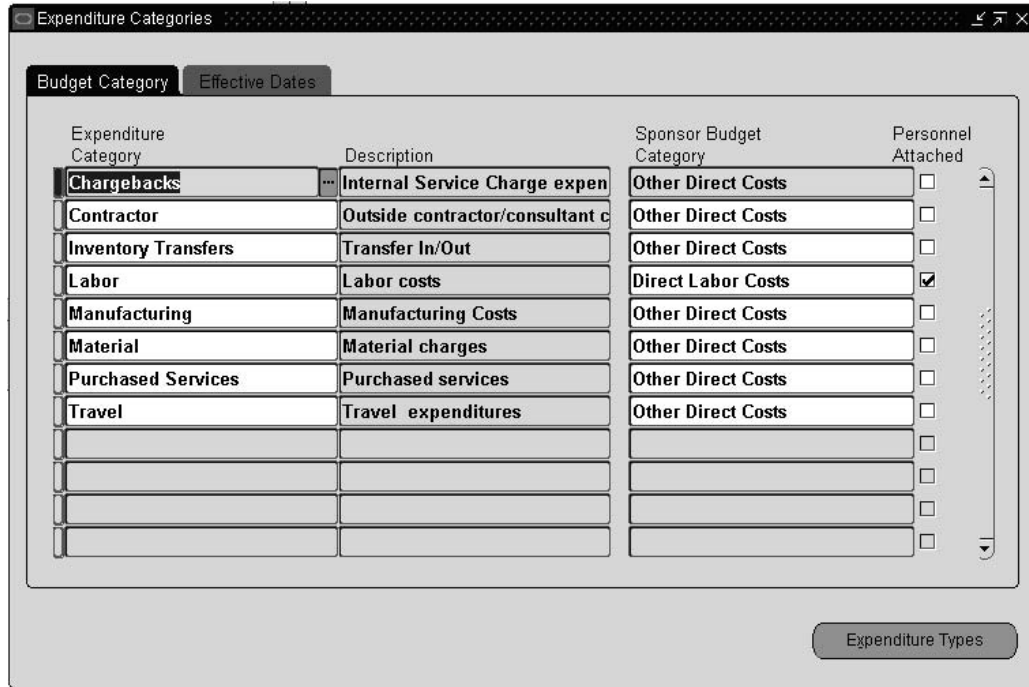
To define rates corresponding to a given rate class and rate type combination:

1. Navigate to the Rate Classes window.
2. Query the appropriate rate class.
3. Query the appropriate rate type.
4. Click the rates button to open the Rates window.
5. Enter the activity type that you are requesting funding for.
6. Enter the fiscal year that you are requesting funding for.
7. Enter the location where the proposed project funding will be completed.
8. Enter the rate in percentage.

Defining Expenditure Categories and Expenditure Types without Grants Accounting Installed

If Grants Accounting is not installed, you must define expenditure categories and expenditure types.

If both Grants Proposal and Grants Accounting are installed, see Assigning Expenditure Categories to Budget Categories with Grants Accounting Installed Procedure, page 5-7 .



Defining Expenditure Categories

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

To define expenditure categories in Grants Proposal when Grants Accounting is not installed:

1. Navigate to the Expenditure Categories window.
2. Enter a user defined-cost classification for the expenditure category.
3. Enter a description for the expenditure category.
4. Enter a sponsor budget category.
5. Check Personnel Attached if a budget category is associated with people.
6. In the Effective Dates tab, enter the start and end date for the expenditure category.
7. Repeat steps 2 to 6 until all expenditure categories that can be used in budgets are entered.

Defining Expenditure Types

Expenditure Type	Description	Start Date	End Date
<input checked="" type="checkbox"/> Computers	Non-labor resource usage	01-JAN-1987	
<input type="checkbox"/> Duplication	Usage of copy machines	01-JAN-1987	
<input type="checkbox"/> Telecommunications	Telecommunication expenses	01-JAN-1987	
<input type="checkbox"/> Miscellaneous	Miscellaneous expenses	01-JAN-1987	
<input type="checkbox"/> Rent Allocation	Internal charges for Rent Allocations	01-JAN-2000	
<input type="checkbox"/> Support Svcs Allocation	Internal charges for Support Services	01-JUL-1999	
<input type="checkbox"/> B&P Cost Allocation	Internal charges for Bid & Proposal Co	01-JAN-2000	
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

To define expenditure types in Grants Proposal when Grants Accounting is not installed:

1. Navigate to the Expenditure Categories window.
2. In the Budget Category tab, select the expenditure category that you need to define expenditure types for.
3. Select the expenditure category that you want to define for.
4. Click the Expenditure Types button.
5. Enter a user-defined cost classification for each expenditure type.
6. Enter a description for the expenditure type.
7. Enter the start and end dates for the expenditure type.

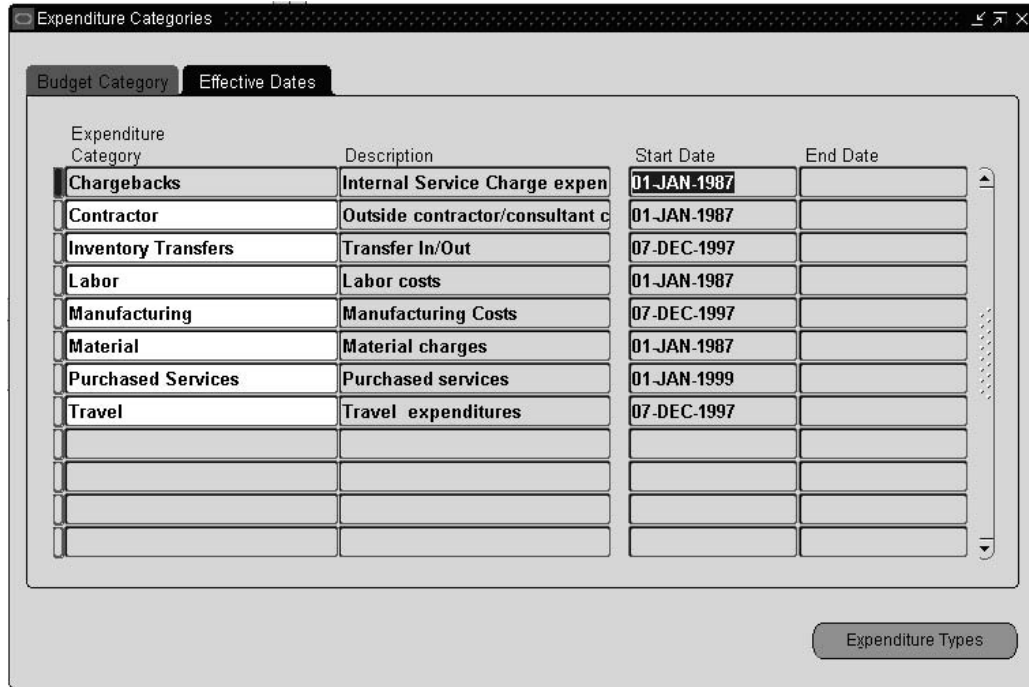
Assigning Expenditure Categories to Budget Categories with Grants Accounting Installed

If Grants Accounting is installed, you must define expenditure categories and expenditure types in the Grants Accounting Expenditure Types window before assigning expenditure categories.

For information about setting up Grants Accounting, see Oracle Grants Accounting Setup Overview, *Oracle Grants Accounting User's Guide*

If Grants Accounting is installed and expenditure categories and expenditure types were defined in Grants Accounting, complete the steps below:

If Grants Accounting is not installed, see Defining Expenditure Categories and Expenditure Types without Grants Accounting Installed, page 5- 5 .

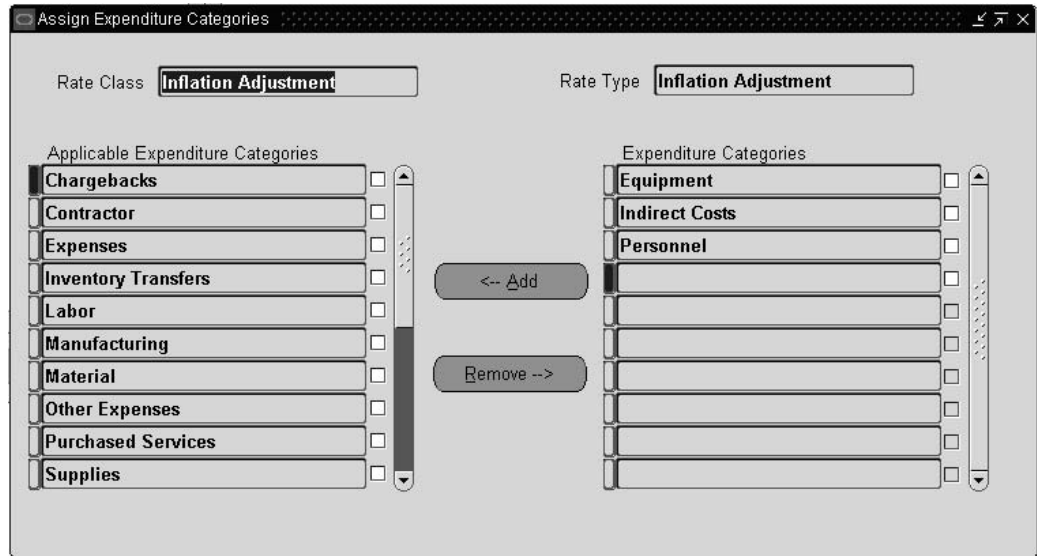


To assign expenditure categories to budget categories in Grants Proposal when Grants Accounting is installed:

1. Navigate to the Assign Expenditure Categories window.
2. In the Budget Category tab, select an expenditure category.
3. Enter a sponsor budget category.
4. Check personnel attached if a budget category is associated with people.
5. In the Effective Dates tab, enter the start and end dates for the expenditure category.

Assigning Expenditure Categories to Rate Class and Rate Type Pairs

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



To assign expenditure categories to rate class and rate type pairs:

1. Navigate to the Assign Expenditure Categories window.
2. Query the appropriate rate class.
3. Query the appropriate rate type.
4. To remove a particular expenditure category from a rate class and rate type pair, select an expenditure category in the Applicable Expenditure Categories field, select the check box to the right of the field, and click Remove button.
5. To assign a particular expenditure category from a rate class and rate type pair, select an expenditure category in the Expenditure Categories field, select the check box to the right of the field, and click the Add button.

Defining a Sponsor Budget Hierarchy

Users define budget hierarchies to specify how to aggregate sponsor budget components according to a sponsor’s specifications. Grants Proposal provides users with a seeded budget hierarchy for 194 Transaction Set (TS).

Sponsor Budget Hierarchy

Hierarchy Name

Parent Category

Sponsor Budget Category	Code
Cost Sharing	88
Participant Total	79
Total Amount Requested	28
Total Cost (Direct & F&A)	38
Total Direct Costs	84

Child Category

Sponsor Budget Category	Code	Num of Subordinates
Cash Contribution (Funds Appropriation)	18	0
In-Kind Contribution from Non-Federal Source	83	0

To define a budget hierarchy:

1. Navigate to the Sponsor Budget Hierarchy window.
2. Enter a hierarchy name.
3. Enter a parent sponsor budget category and code.
4. Enter a child sponsor budget category and code.

Questions Setup

Questions in Grants Proposal

Many sponsors require that responses to various questions are included with your proposal before funding is considered. Set up questions that relate to assurance, compliance, and certification issues from your grant sponsor. You enter three types of questions in questions setup: organization specific, proposal specific, and individual specific. All questions are answered with either Yes, No, or NA.

You must set up questions before you can use the question in Oracle Grants Proposal. Typically, the organization's Sponsored Research Office sets up and maintains the list of questions. Only authorized personnel can add or modify the questions.

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

As needed, responses to applicable questions are attached to the proposal. Applicable questions are those that are answered either Yes or No.

Setting Up Questions

Question Number	Applies To	Question
GP09	Individual	Do you have a conflict of interest with this proposal?
GP10	Individual	Have you filed out a mandatory conflict of interest form and submitted
H0	Organization	Organization certifies compliance with Federal lobbying regulations?
H5	Organization	Organization certifies compliance with Drug Free Workplace act?
H6	Organization	Organization certifies compliance with code of Federal regulations..?
H7	Organization	Organization provides a smokefree workplace?
H8	Organization	Organization certifies compliance with Federal Discrimination Regulat
H9	Organization	Organization provides compliance with CFAR regarding responsibility
I7	Organization	Organization has delinquent Federal Debts?
I8	Organization	Organization has been placed on Federal Debarment and Suspension

New Open

To set up questions or to add new questions:

1. Navigate to the List of Questions window.
2. Click the New button.
3. In the Question Number field, enter the question number.
4. In the Applies To field, select the entity that the question applies to.
5. In the Effective Dates fields, select the question starting and ending dates.
6. In the Question field, enter the question.
7. If an explanation is required when the answer to the question is *Yes* during proposal preparation, select the Yes check box.
8. If an explanation is required when the answer to the question is *No* during proposal preparation, select the No check box.
9. If an explanation is associated with the question, select the Explanation tab, and enter the explanation in the field.
10. If a policy is associated with the question, select the Policy tab and enter the policy in the field.
11. If a regulation is associated with the question, select the Regulation tab and enter the regulation in the field.

Modifying Questions

The screenshot shows a 'Question Detail' window with the following fields and options:

- Question Number:
- Applies To:
- Effective Date: —
- Question:
- Explanation Required For: Yes No
- Bottom tabs: Explanation, Policy, Regulation
- Bottom area:

To modify existing questions:

1. Navigate to the List of Questions window.
2. Complete a query to see all existing questions.
3. To modify a question, select the question that you want to change and click the Open button.
4. Modify the data as required.

Organization Details Setup

Organization Details

Enter organization details that are required by various sponsors when you submit proposals. Sponsors use these organization details to identify specific attributes of your organization through the use of code numbers that act as identifiers. This information is typically not maintained in the Oracle Human Resource Management Systems database.

You must setup organization details within Grants Proposal to correctly use Oracle Grants Proposal including entering organization-specific data, specifying the organization type, and answering organization-specific questions required by sponsors.

Setting Up Organization Information

Setting up organizational information is a one time setup step. Different sponsors require different sets of organization-specific data.

Before setting up organization details, your organization must exist in the Human Resource Management Systems database. To set up organizations in Human Resource Management Systems, see *Creating an Organization, Using Oracle HRMS - The Fundamentals*.

Setting Up Organization Details

Organization Details

Organization Details Unit Details

Organization Signing Official

Congressional District Organization IPF Code

DUNS Number Entity ID Num

DODAAC Number Taxpayer ID Num

NSF Institutional Code DUNS+4 Number

CAGE Number Animal Assurance Number

Human Assurance Number

—DHHS Agreement—

DHHS Agreement Date

DHHS Agreement being negotiated with Regional Office

No DHHS Agreement, but rate established with Date

To set up organization details:

1. Navigate to the Organization Details window.
2. In the Organization Details tab, enter the organization that is submitting the proposal.
3. Enter the signing official at your organization who approves your proposal.
4. Enter the congressional district where your proposed project is performed.
5. Enter the Institution Profile File (IPF) code for your organization.
6. Enter the DUNS number for your organization, if required.
7. Enter the Entity ID Number for your organization
8. Enter the Department of Defense Activity Code (DODAAC), if required.
9. Enter the Taxpayer ID number, if required.
10. Enter the NSF Institutional Code for your organization, if required.
11. Enter the DUNS+4 number for your organization, if required.
12. Enter the Commercial and Government Entity (CAGE) for your organization, if required.
13. Enter the Animal Assurance number for your organization, if required.
14. Enter the Human Assurance number for you organization, if required.

Setting Up Organization Types

The screenshot shows a dialog box titled "Organization Types". At the top, there is a label "Organization" followed by a text input field containing "Progress Master". Below this is a label "Organization Type" followed by a list box. The list box contains several items: "Municipality" (which is selected and highlighted), "County", "Transit Authority", and several empty rows. At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

To set up organization types:

1. In the Organization Details window, click the Organization Types button.
2. Enter the organization type information.

Answering Organization-Specific Questions

Organization Name

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

Explanation

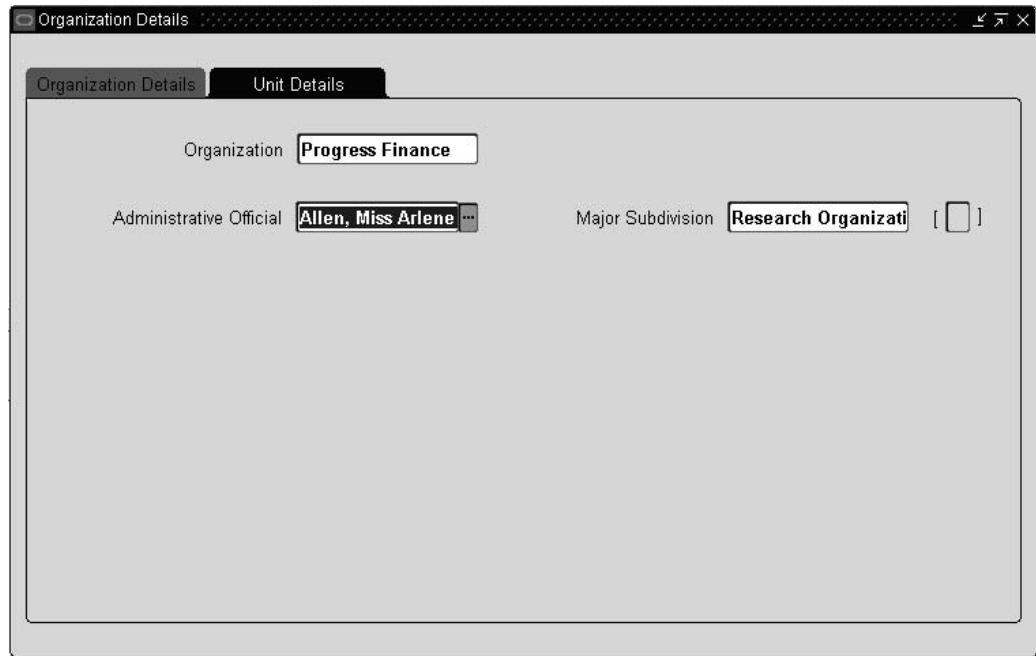
Review Date

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

To answer organization-specific questions:

1. In the Organization Details window, click the Organization Questions button.
2. Select the appropriate question number to answer.
3. Select the corresponding Yes, No, or NA radio button to answer the selected organization-specific question.
4. Enter the explanation for the question, if required
5. Enter the review date, if required.

Entering Organization Information



The screenshot shows a window titled "Organization Details" with two tabs: "Organization Details" and "Unit Details". The "Unit Details" tab is active. The form contains the following fields:

- Organization:
- Administrative Official: (with a dropdown arrow)
- Major Subdivision: (with a dropdown arrow)

To enter organization information:

1. In the Organization Details window, select the Unit Details tab.
2. Enter the organization or department that coordinates and administers the proposal development tasks at your organization.
3. Enter the name of the administrative official at your organization who is authorized to sign on behalf of the lead unit that is preparing the proposal.
4. Enter the major subdivision or parent organization of the organization that coordinates the proposal development process at your organization.

Biographical Sketch Setup

Biographical Sketch

Biographical sketch is educational, research, and professional experience data about an individual who will work on the research project if a grant is awarded.

You must setup biographical sketch information for Oracle Grants Proposal to work correctly. This information is a biographical database for Grants Proposal users.

Most sponsors require that biographical information about the proposal manager and every key member of the proposed research project team is submitted with the grant proposal. Biographical sketch data includes a team member's information about education, work experience, honors received, memberships, and publications.

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

Entering Biographical Sketch Information

Before setting up biographical sketch information, you must enter employee information in Oracle Human Resource Management Systems.

To enter employee information, see *Entering a New Person, Managing People Using Oracle HRMS*.

Entering Biographical Sketch Education and Experience Information

The screenshot shows the Oracle Grants Proposal 'Setup' window for 'Biographical Sketch: Cravillon, Ann'. The window has a navigation bar with 'Person', 'Organization', 'Budget', and 'Application Forms'. Below the title bar, there are 'Cancel' and 'Apply' buttons. The 'Education' section contains a table with the following data:

*University	*Degree Type	*Degree	Field of Study	Specialization	*Graduation Date	Report Sequence	Delete
	Associate Degree (e.g., Associate in Science)					1	

Below the table is an 'Add Another Row' button. The 'Experience' section contains a table with the following data:

Type	*Description	Report Sequence	Delete
Experience		1	

Below the table is an 'Add Another Row' button. At the bottom of the window, there are 'Cancel' and 'Apply' buttons, and a footer with copyright information and a 'Privacy Statement' link.

To enter biographical sketch information:

1. Navigate to the Setup Person page.
2. Enter the name of the person that you want to prepare the biographical data for.
3. Click the biographical sketch icon to display the Biographical Sketch page.
4. Enter the name of the university from where the person received the degree.
5. Enter the type degree that the person received.
6. Enter the name of the degree that the person received.
7. Enter the general field of study.
8. Enter the area specialization.
9. Enter the date of graduation.
10. In the Experience type field, select the type of experience that the person has.
11. Enter a brief description about the experience.
12. Enter the sequence number for the order that you want to print the forms.

Keywords Setup

Keywords

Keywords are user-defined identifiers that you use to identify research areas while preparing grant proposals.

Keywords setup is an optional, one-time setup step which lets you upload a keyword to the IGW_SCIENCE_CODES table. Uploading keywords to the IGW_SCIENCE_CODES table lets you select keywords from the list of values in the Keywords page when you prepare the proposals.

Uploading Keywords

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

- Use a SQL script containing INSERT statements.
- Use the SQL Loader tool.

For information about the IGW_SCIENCE_CODES table, see the *Oracle Electronic Technical Reference Manual (eTRM)* available from [OracleMetaLink](#).

Application Forms Package

Application form Setup

Application Forms are sponsor-specific grant application pages that you can individually print. The application forms issued by the grantor are in PDF format which you can merge in the application with the help of Oracle XML publisher. Oracle XML Publisher is a new java-based product available within the technology stack of e-Business suite.

Oracle Grants Proposal currently supports PHS 398 forms.

Setup Procedure for Application Forms

ORACLE® Oracle Grants Proposal [Dashboard](#) [Home](#) [Logout](#) [Preferences](#) [Help](#) [Diagnostics](#) **Setup**

[Person](#) | [Organization](#) | [Budget](#) | **Application Forms**

[Setup: Application Forms](#) >

Create Application Forms Package

* Indicates required field

* Package Name

Opportunity Title

Opportunity Number

Grantor

Application Forms

Application Form Name	Description	Preview	Sequence	Delete
<input type="text" value="PHS 398 Checklist Page"/>			<input type="text"/>	

[Setup](#) | [Dashboard](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#) | [Diagnostics](#)

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To setup the Application Forms package:

1. Navigate to the Applications Forms page.
2. Click the Create Application Forms Package button.
3. Enter a unique package name.

4. Enter the opportunity title and the opportunity number.
5. Select the grantor.
6. Select the application form name.
7. Enter the sequence number for the order that you want to print the forms.

Grants Proposal Approval and Routing Process

Definition and Overview

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

These business rules are defined by users for an organization:

- Validation
- Routing
- Notification

An approval hierarchy is a ranking of approval organizations, starting with the organization that is preparing the proposal and ending with the sponsor organization.

Before a proposal is submitted to a sponsor, the proposal must be internally reviewed and approved by the Proposal Manager or the Proposal Owner.

Once the proposal is submitted for approval, the proposal status changes from *In-Progress* to *Approval In-Progress*. If the proposal is rejected during the approval process, you can modify and resubmit the proposal for approval. The proposal process is finished when the final approver approves the proposal and the proposal status changes from *Approval-In-Progress* to *Approved*.

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

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

You can modify a proposal based on these factors:

- Proposal status
- Proposal user role

For information on proposal modification, see Proposal Security Process, page B- 1 .

Proposal Approval Process

Evaluating Routing Business Rules

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

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

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

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

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

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

Evaluating Expressions

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

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

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

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

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

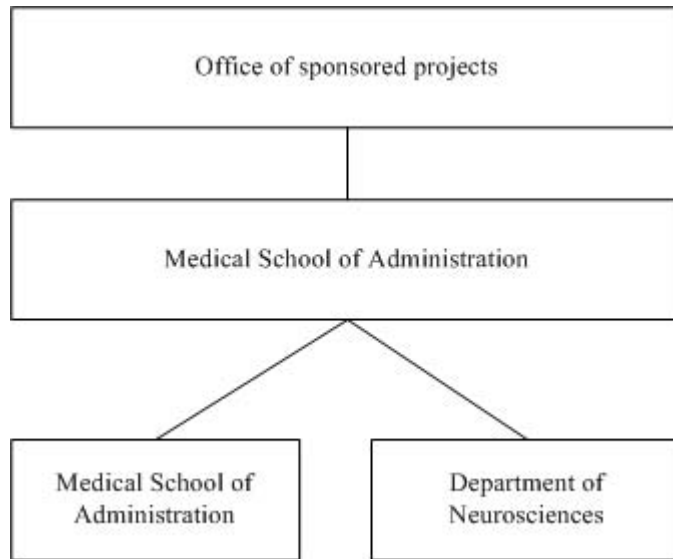
This expression is evaluated as True and routing map Special Approval is selected.

Proposal Approval Process Example

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

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

This figure illustrates the organization approval hierarchy as described in the accompanying text.



Users in this example create the business rules and maps shown in this table.

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

Suppose that the Department of Anatomy is the applicant unit that prepares a proposal that has an under recovery amount of \$50,000. The validation business rule is invoked first. Since the Department of Anatomy has no validation business rule, Grants Proposal skips validation business rule and evaluates the Medical School Administration. Since the Medical School Administration has no validation business rule, Grants Proposal skips validation business rule and evaluates the Office of Sponsored Projects. Because

the under recovery amount is greater than zero, the validation business rule evaluates as *Invalid* and the proposal is not submitted for approval.

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

Proposal Security Process

Definition and Overview

Proposal Security regulates access to different functional areas in the proposal. Generally, the functional areas correspond to the tabs within Oracle Grants Proposal.

You must setup the Proposal Roles and Proposal Superuser Profile Option. See Setup Proposal Roles, page 4- 1 for more information.

Every user who has access to a responsibility can create proposals. The person who creates a proposal, automatically gets the IGW: Proposal Owner Role. While creating a proposal, the user needs to assign both a proposal manager as well as a proposal signing official. The proposal manager is assigned to the IGW: Proposal Manager Role and the signing official in the proposal automatically is assigned the IGW: Signing Official Role.

Grants Proposal provides users with seeded proposal roles and lets users define additional user-defined roles. The Proposal Owner or the Proposal Manager assigns roles to proposal personnel.

Proposal Rights and Proposal Status Values

This table shows which rights are active during the life of the proposal.

Rights	In Progress	Approval in Progress	Approved	Rejected
IGW: Modify Submission History Right	No	No	Yes	No
IGW: Modify Award Right	No	No	Yes	No
IGW: Modify Budget Right	Yes	No	No	Yes
IGW: Modify Checklist Right	Yes	No	No	Yes
IGW: Modify Personnel (All) Right	Yes	No	No	Yes
IGW: Modify Personnel (Self) Right	Yes	No	No	Yes
IGW: Modify Proposal Right	Yes	No	No	Yes
IGW: Modify Security Roles Right	Yes	Yes	Yes	Yes
IGW: View Application Forms Right	Yes	Yes	Yes	Yes
IGW: Submit Proposal for Approval Right	Yes	No	No	Yes
IGW: View Award Right	No	No	Yes	No
IGW: View Budget Right	Yes	Yes	Yes	Yes
IGW: View Proposal Right	Yes	Yes	Yes	Yes

Proposal Security Example

This table shows an example of personnel for a proposed research project with their associated responsibilities.

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

This table shows an example of the roles assigned to the project personnel.

Project Personnel	Assigned Roles
John O'Connor	IGW: Proposal Owner Role, IGW: Proposal Manager Role
Linda Smith	IGW: Proposal Budget Manager Role

Grants Proposal Security Process

This table describes the Grants Proposal security process.

Event	Description	When the Event Occurs	Where the Event Occurs
1.	Users define proposal roles and assign one or more seeded rights to those roles as a setup procedure.	When the permission sets are saved or modified.	Functional Admin Responsibility: Permission Sets window
2.	The person who creates the proposal is automatically assigned the IGW: Proposal Owner role and is automatically assigned all rights. Grants Proposal defines the Proposal Owner as the login user.	When the proposal is created.	Create Proposal page
3.	Proposal Manager specified in the proposal automatically gets IGW: Proposal Manager Role. If the Proposal Manager is changed, this role is transferred to the new Proposal Manager.	When the proposal is created or updated.	Create Proposal page or Update General Information page
4.	Signing Official specified in proposal automatically gets IGW: Signing Official Role. If the Signing Official is changed, this role is transferred to the new Signing Official.	When the proposal is created or updated.	Create Proposal page or Update General Information page
5.	Proposal Owner or Proposal Manager assigns the Proposal Roles to Proposal Personnel.	When the roles are assigned to Personnel.	Security Roles Window

Oracle Grants Proposal Workflow Process

Overview

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

Workflow features include the following:

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

Grants Proposal provides the following Workflow functionality:

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

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

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

Proposal Approval Process

The Proposal Approval Process is initiated when a proposal is submitted for approval.

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

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

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

Notify Approval Subprocess

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

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

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

Notify Proposal Members Process

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

IGW Proposal Approval Item Type

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

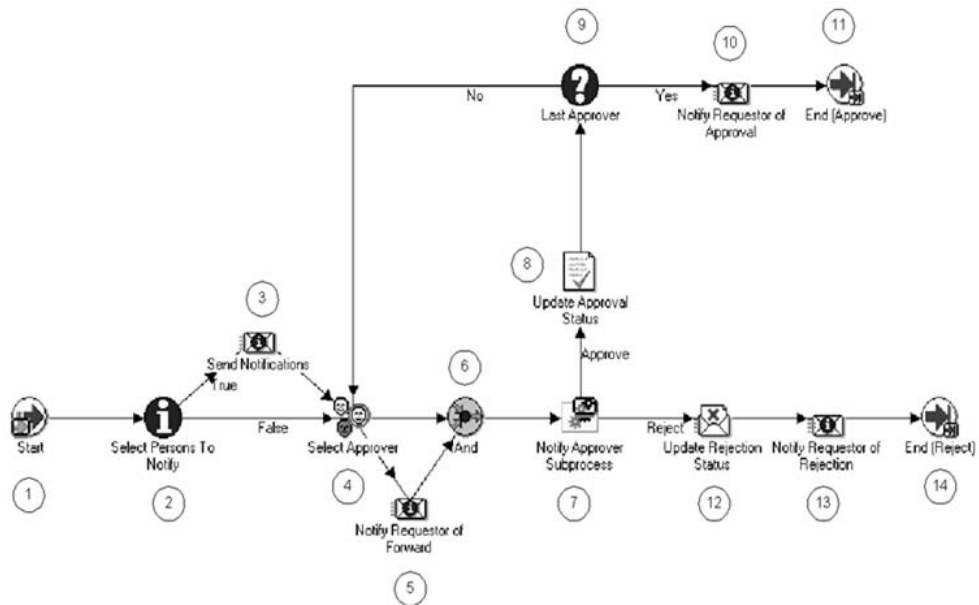
This table describes the attributes associated with the IGW Proposal Approval item type.

Display Name	Description	Type	Length, Format, or Lookup Type
Forward From Display Name	Name of the person that the proposal is forwarded from	Text	240
Forward From Username	Username of person that the proposal is forwarded from	Text	30
Forward To Display Name	Name of person that the proposal is forwarded to	Text	240
Forward To Username	Username of person that the proposal is forwarded to	Text	30
Proposal Number	Unique identifier of the proposal	Text	30
Creator Display Name	Name of person submitting the proposal for approval	Text	240
Creator Username	Username of person submitting the proposal for approval	Text	30
Notification Role Name	Workflow ad hoc role display name	Text	30
Proposal Title	Proposal title	Text	250

Display Name	Description	Type	Length, Format, or Lookup Type
Sponsor	Funding source	Text	50
Deadline Date	Last date for proposal submission to sponsor	Date	10
Proposal ID	Proposal identifier	Number	15
Run ID	Run identifier	Number	15
Lead Organization Name	Lead organization that the proposal is developed and administered through	Text	60
Note	Message that approver sends when proposal is approved or rejected	Text	2000
Notification Note	Message sent to persons listed in the Send Notifications window	Text	2000
Proposal Manager	Proposal manager	Text	240
Proposal Owner	Proposal owner	Text	240
Proposal Type	Proposal type	Text	80

Proposal Approval Process Workflow

This figure shows the proposal approval process nodes as described in the accompanying text.



This section describes the Proposal Approval Workflow Process.

Start (Node 1)

This table describes a standard function activity, which marks the start of the Workflow process.

Function	Result Type	Prerequisite Activities
WF_STANDARD.NOOP	None	None

Select Persons to Notify (Node 2)

This table describes a function activity, which selects the persons to be notified of the proposal being submitted for approval.

Function	Result Type	Prerequisite Activities
IGW_WORKFLOW.SELECT_PERSONS_TO_NOTIFY	Boolean	Start

Send Notifications (Node 3)

This table describes an activity, which notifies the selected persons that the proposal has been submitted for approval.

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

Select Approver (Node 4)

This table describes a function activity, which selects the next approver in the hierarchical approval map.

Function	Result Type	Prerequisite Activities
IGW_WORKFLOW.SELECT_APPROVER	None	Send Notifications

Notify Requestor of Forward (Node 5)

This table describes an activity, which notifies the person submitting the proposal for approval that the proposal has been forwarded to the next approver in the approval map.

Message	Result Type	Prerequisite Activities
Proposal Forward	None	Select Approver

And (Node 6)

This table describes a standard function activity, which performs a parallel and a join. The node waits for all incoming transitions to arrive before it completes activity.

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

Notify Approver Subprocess (Node 7)

This table describes a Subprocess, which notifies the approver that a proposal was received for approval.

Process	Result Type	Prerequisite Activities
NOTIFY_APPROVER_SUBPROCESS	Approval	And

Update Approval Status (Node 8)

This table describes a function activity, which marks the action of the approver as approved.

Function	Result Type	Prerequisite Activities
IGW_WORKFLOW.UPDATE_APPROVAL_STATUS	None	Notify Approver

Last Approver (Node 9)

This table describes a function activity, which determines whether or not there are any other approvers in the approval map.

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

Notify Requestor of Approval (Node 10)

This table describes an activity, which notifies the person submitting the proposal for approval that the proposal was approved.

Message	Result Type	Prerequisite Activities
Proposal Approved	None	Last Approver

End (Approve) (Node 11)

This table describes a standard function activity, which marks the end of the process. The Workflow process ends with the proposal being approved.

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

Update Rejection Status (Node 12)

This table describes a function activity, which marks the action of the approver as rejected.

Function	Result Type	Prerequisite Activities
IGW_WORKFLOW.UPDATE_REJECTION_STATUS	None	Notify Approver

Notify Requestor of Rejection (Node 13)

This table describes an activity, which notifies the person submitting the proposal for approval that the proposal was rejected.

Message	Result Type	Prerequisite Activities
Proposal Rejected	None	Update Rejection Status

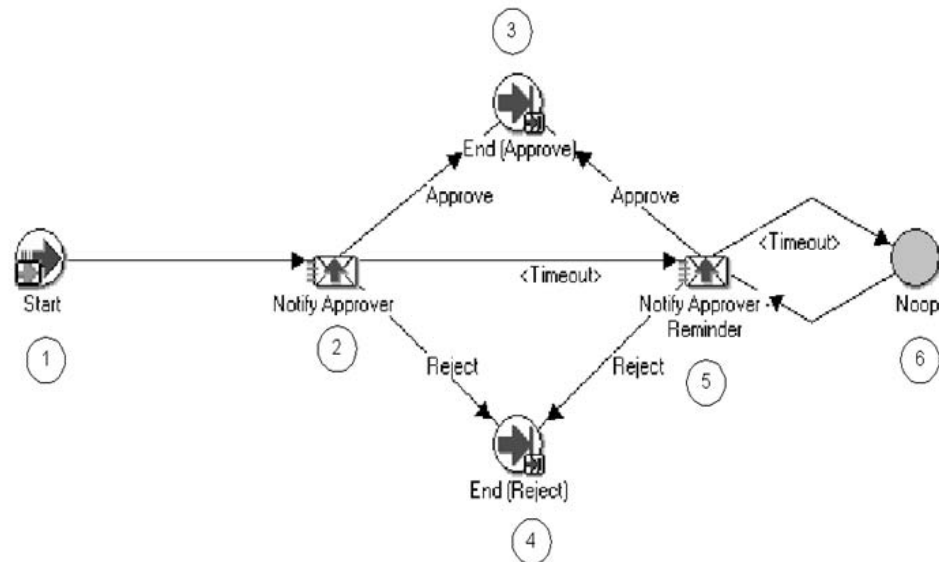
End (Reject) (Node 14)

This table describes a standard function activity, which marks the end of the process. The Workflow process ends with the proposal being rejected.

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

Notify Approver Subprocess Workflow Process

This figure shows the notify approver subprocess nodes as described in the accompanying text.



Start (Node 1)

This table describes a standard function activity that marks the start of the process.

Function	Result Type	Prerequisite Activities
WF_STANDARD.NOOP	None	None

Notify Approver (Node 2)

This table describes an activity, which notifies the approver that there is a proposal pending for approval.

Message	Result Type	Prerequisite Activities
Notify Approver	Approval	Start

End (Approve) (Node 3)

This table describes an activity, which marks the end of the process.

Function	Result Type	Prerequisite Activities
WF_STANDARD.NOOP	None	Notify Approver

End (Reject) (Node 4)

This table describes a function activity, which marks the end of the process.

Function	Result Type	Prerequisite Activities
WF_STANDARD.NOOP	None	Notify Approver

Notify Approver Reminder (Node 5)

This table describes an activity, which sends a reminder notification to the approver if the approver fails to deliver a decision within the specified time limit.

Message	Result Type	Prerequisite Activities
Notify Approver	Approval	Notify Approver

Noop (Node 6)

This table describes a function node that is simply a placeholder, which does not perform any operation.

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

Notify Proposal Members Workflow Process

This table shows the notify proposal members nodes as described in the accompanying text.



Start (Node 1)

This table describes a standard function activity, which marks the start of the process.

Function	Result Type	Prerequisite Activities
WF_STANDARD.NOOP	None	None

Notify Proposal Members (Node 2)

This table describes an activity, which sends a notification to persons listed in the Send Notifications window.

Message	Result Type	Prerequisite Activities
Notify Proposal Members	None	Start

End (Node 3)

This table describes a function activity, which marks the end of the process.

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

Customizing Grants Proposal Workflow

The Grants Proposal Workflow processes can be customized as follows.

No modifications are required to run Grants Proposal Workflow processes.

Organizations can make the following optional customizations:

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

Note: Do not create your own custom process to replace the Grants Proposal Workflow processes.

Uploading Proposals from External Systems

Definition and Overview

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

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

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

- Basic proposal data
- Proposed work sites
- Proposal persons
- Special reviews
- Budgets
- Budget periods

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

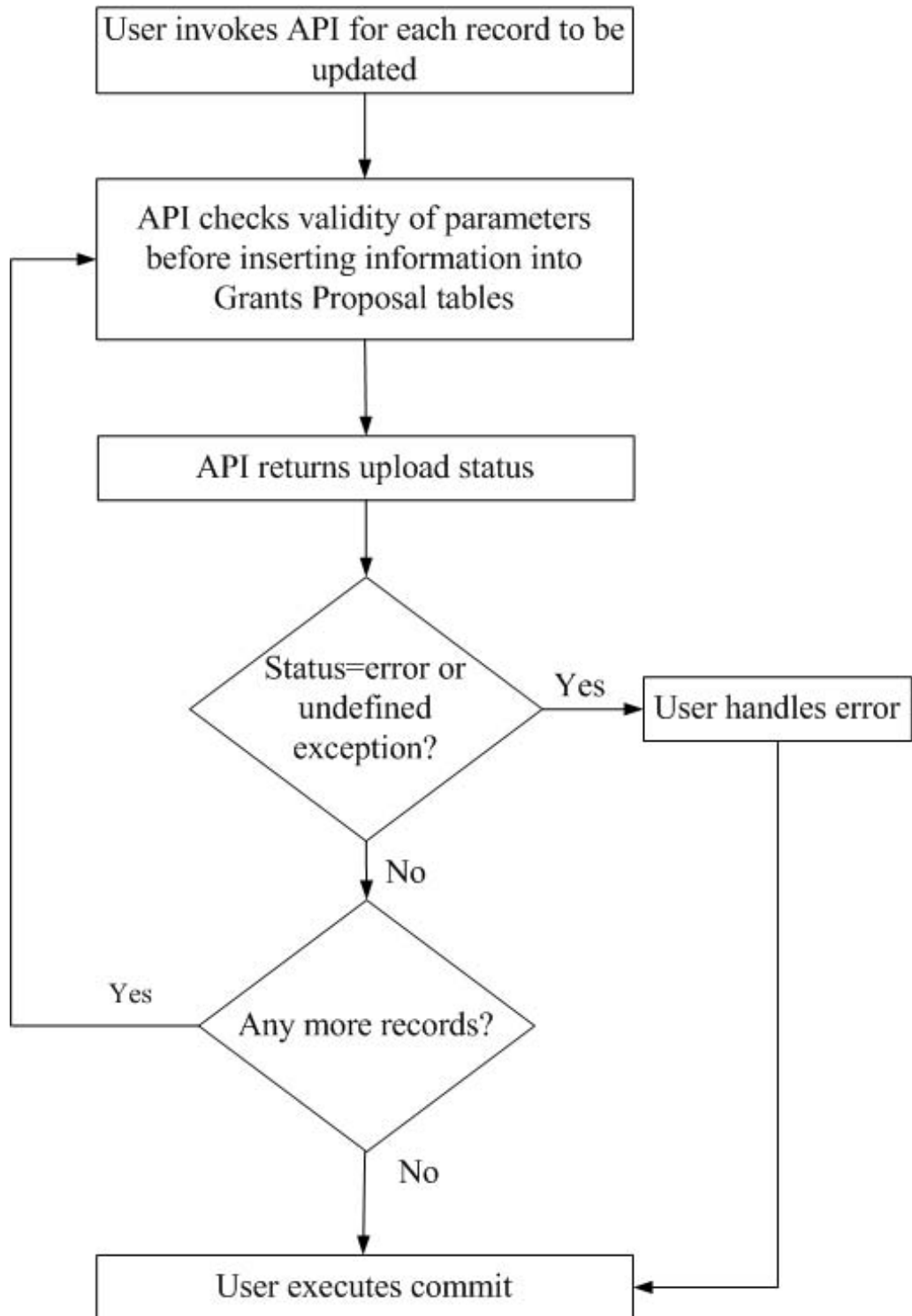
API Usage

This table describes API usage.

Event	Description
1.	Users invokes FND_GLOBAL.APPS_INITIALIZE API for each record to be uploaded.
2.	The API checks for the validity of the parameters before inserting the information in the Grants proposal tables.
3.	The API returns the upload status.
4.	User handles the errors returned by API if X-return status is either E or U.
5.	The API checks for more records if the upload status is not equal to either E or U and the flow starts from step 2 again.
6.	If there are no more records, the user executes commit explicitly.

API Usage Flowchart

This figure shows the API usage flowchart as described in the table



Uploading Basic Proposal Data

The IGW_CREATE_PROPOSAL_PUB package contains the API to upload basic proposal data. This table lists the parameters for the IGW_CREATE_PROPOSAL_PUB.CREATE_PROPOSAL procedure.

Parameter	Usage	Type	Description
P_INIT_MSG_LIST	IN	VARCHAR2	Variable to initialize message stack
P_COMMIT	IN	VARCHAR2	Commits inserted data into Grants Proposal tables
P_VALIDATE_ONLY	IN	VARCHAR2	Invokes API in validation mode
P_PROPOSAL_NUMBER	IN	VARCHAR2	Proposal number; unique number assigned to the proposal
P_PROPOSAL_SHORT_TITLE	IN	VARCHAR2	Proposal short title
P_PROPOSAL_TITLE	IN	VARCHAR2	User-defined proposal title
P_PROPOSAL_STATUS	IN	VARCHAR2	Proposal status code
P_PROPOSAL_STATUS_MEANING	IN	VARCHAR2	Proposal status meaning
P_PROPOSAL_START_DATE	IN	DATE	Start date of proposed research project
P_PROPOSAL_END_DATE	IN	DATE	End date of proposed research project
P_PROPOSAL_TYPE	IN	VARCHAR2	Seeded proposal types; users can also add user-defined proposal types. Seeded options include New, Competing Continuation, Non-Competing Continuation, Revision, and Supplemental.
PROPOSAL_TYPE_CODE	IN	VARCHAR2	Proposal type code
PROPOSAL_TYPE_MEANING	IN	VARCHAR2	Proposal type meaning
P_ACTIVITY_TYPE_CODE	IN	VARCHAR2	Activity type code
P_ACTIVITY_TYPE_MEANING	IN	VARCHAR2	Activity type meaning

Parameter	Usage	Type	Description
P_ACTIVITY_TYPE	VARCHAR2	IN	System-defined type of activity that the proposed research is requesting funding for. Options include Research for research grants, Instruction for instructional or training grants, Fellowships for supporting postdoctoral fellows, Public Service for a public service project, Student Service for a research proposal supporting students, Hospital, Hospital Affiliate, and Other for any other purpose.
P_PROPOSAL_MANAGER_NAME	VARCHAR2	IN	Proposal manager name
P_SPONSOR_NAME	VARCHAR2	IN	Funding source to which the proposal is submitted
P_PROPOSAL_CATEGORY_CODE	IN	VARCHAR2	Proposal category code
P_PROPOSAL_CATEGORY_MEANING	IN	VARCHAR2	Proposal category meaning
P_PROPOSAL_PURPOSE_CODE	IN	VARCHAR2	Proposal purpose code
P_PROPOSAL_PURPOSE_MEANING	IN	VARCHAR2	Proposal purpose meaning
P_CROSS_CUT_TYPE_CODE	IN	VARCHAR2	Cross cut type code
P_CROSS_CUT_TYPE_MEANING	IN	VARCHAR2	Cross cut type meaning
P_PROPOSAL_URL	IN	VARCHAR2	Proposal URL
P_GRANTOR_ID	IN	NUMBER(15)	Proposal grantor identifier
P_GRANTOR_NAME	IN	VARCHAR2	Funding source to which the proposal is submitted
P_PROPOSAL_MANAGER_ID	IN	NUMBER(15)	Proposal manager identifier
P_PROPOSAL_MANAGER_NAME	IN	VARCHAR2	Proposal manager name

Parameter	Usage	Type	Description
P_SIGNING_OFFICIAL_P ARTY_ID	IN	NUMBER(15)	Signing official identifier
P_SIGNING_OFFICIAL_ NAME	VARCHAR2	IN	Name of individual who signs the proposal on behalf of the applicant organization before the proposal is submitted to the sponsor
P_ADMIN_OFFICIAL_ NAME	VARCHAR2	IN	Name of the individual who signs the proposal on behalf of the applicant unit
P_ADMIN_OFFICIAL_ PARTY_ID	IN	NUMBER(15)	Administrative official identifier
P_ADMIN_OFFICIAL_ NAME	IN	VARCHAR2	Name of the individual who signs the proposal on behalf of the applicant unit
P_LEAD_ORGANIZAT ION_ID	IN	NUMBER(15)	Applicant unit identifier
. P_APPLICANT_UNIT_ NAME	IN	VARCHAR2	Organization or department that coordinates and administers the proposal development tasks
P_ORIGINAL_PRO POSAL_NUMBER	IN	VARCHAR2	Original proposal number
P_PARENT_PROPOSAL_ ID	IN	NUMBER(15)	Parent proposal identifier
. P_PARENT_PROPOSAL_ NUMBER	IN	VARCHAR2	Parent proposal number
P_SPONSOR_APPLICAT ION_NUMBER	IN	VARCHAR2	Grantor application number
P_ATTRIBUTE_ CATEGORY	IN	VARCHAR2	Descriptive flexfield attribute category
P_ATTRIBUTE1	IN	VARCHAR2	Descriptive flexfield attribute1
P_ATTRIBUTE2	IN	VARCHAR2	Descriptive flexfield attribute2
P_ATTRIBUTE3	IN	VARCHAR2	Descriptive flexfield attribute3
P_ATTRIBUTE4	IN	VARCHAR2	Descriptive flexfield attribute4

Parameter	Usage	Type	Description
P_ATTRIBUTE5	IN	VARCHAR2	Descriptive flexfield attribute5
P_ATTRIBUTE6	IN	VARCHAR2	Descriptive flexfield attribute6
P_ATTRIBUTE7	IN	VARCHAR2	Descriptive flexfield attribute7
P_ATTRIBUTE8	IN	VARCHAR2	Descriptive flexfield attribute8
P_ATTRIBUTE9	IN	VARCHAR2	Descriptive flexfield attribute9
P_ATTRIBUTE10	IN	VARCHAR2	Descriptive flexfield attribute10
P_ATTRIBUTE11	IN	VARCHAR2	Descriptive flexfield attribute11
P_ATTRIBUTE12	IN	VARCHAR2	Descriptive flexfield attribute12
P_ATTRIBUTE13	IN	VARCHAR2	Descriptive flexfield attribute13
P_ATTRIBUTE14	IN	VARCHAR2	Descriptive flexfield attribute14
P_ATTRIBUTE15	IN	VARCHAR2	Descriptive flexfield attribute15
X_PROPOSAL_ID	OUT	NUMBER(15)	Proposal identifier
X_PROPOSAL_NUMBER	OUT	VARCHAR2	Proposal number
X_RETURN_STATUS	OUT	VARCHAR2	Status of the upload; possible values are S = Success, E = Error, and U = Undefined Exception
X_MSG_COUNT	NUMBER	VARCHAR2	Total number of error messages stored in the error stack
X_MSG_DATA	OUT	VARCHAR2	Error message text if upload failure occurs due to a single error

Uploading Proposed Work Sites

The IGW_PROP_LOCATIONS_PUB package contains the API to upload proposed work sites data. This table lists the parameters for the IGW_PROP_LOCATIONS_PUB.CREATE_PERFORMING_SITE procedure.

Parameter	Usage	Type	Description
P_VALIDATE_ONLY	IN	VARCHAR2	Invokes API in validation mode
P_COMMIT	IN	VARCHAR2	Commits inserted data into Grants Proposal tables
P_PROPOSAL_NUMBER	IN	VARCHAR2 P	Proposal number of the previously submitted proposal; required for continuation
P_GEOGRAPHIC_LOCATION	IN	VARCHAR2	Geographic location of work
P_PERFORMING_ORG_NAME	IN	VARCHAR2	Name of the organization where the research is performed
X_RETURN_STATUS	OUT	VARCHAR2	Status of the upload; possible values are S = Success, E = Error, and U = Undefined Exception
X_MSG_COUNT	OUT	NUMBER	Total number of error messages stored in the error stack
X_MSG_DATA	OUT	VARCHAR2	Error message text if upload failure occurs due to a single error

Uploading Proposal Persons

The IGW_PROP_PERSONS_PUB package contains the API to upload proposal persons data. This table lists the parameters for the IGW_PROP_PERSONS_PUB.CREATE_PROPOSAL_PERSON procedure.

Parameter	Usage	Type	Description
P_VALIDATE_ONLY	IN	VARCHAR2	Invokes API in validation mode
P_COMMIT	IN	VARCHAR2	Commits inserted data into Grants Proposal tables
P_PROPOSAL_NUMBER	IN	VARCHAR2	Proposal identifier
P_FULL_NAME	IN	VARCHAR2	Person's first and last name
P_PROPOSAL_ROLE_DESC	IN	VARCHAR2	User-defined role of person on the proposed project
P_KEY_PERSON_FLAG	IN	VARCHAR2	Key person on the project
P_PERSON_UNIT_NAME	IN	VARCHAR2	Organizational unit of person's primary appointment
X_RETURN_STATUS	OUT	VARCHAR2	Status of the upload; possible values are S = Success, E = Error, and U = Undefined Exception
X_MSG_COUNT	OUT	NUMBER	Total Nnumber of error messages stored in the error stack
X_MSG_DATA	OUT	VARCHAR2	Error message text if upload failure occurs due to a single error

Uploading Special Reviews

The IGW_PROP_SPECIAL_REVIEWS_PUB package contains the API to upload special reviews data. This table lists the parameters for the IGW_PROP_SPECIAL_REVIEWS_PUB.CREATE_PROP_SPECIAL_REVIEW procedure.

Parameter	Usage	Type	Description
P_VALIDATE_ONLY	IN	VARCHAR2	Invokes API in validation mode
P_COMMIT	IN	VARCHAR2	Commits inserted data into Grants Proposal tables
P_PROPOSAL_NUMBER	IN	VARCHAR2	Proposal identifier
P_SPECIAL_REVIEW_DESC	IN	VARCHAR2	Special review type; seeded options include Human Subjects or Vertebrate Animals.
P_TITLE	IN	VARCHAR2	Protocol title

Parameter	Usage	Type	Description
P_PROTOCOL_NUMBER	IN	VARCHAR2	Identifier assigned to the protocol form after approval by the special review committee
P_SPECIAL_REVIEW_TY PE_DESC	IN	VARCHAR2	Seeded options include Full or Expedited. Full indicates that the organization's Institutional Review Board (IRB) conducts a full, detailed review. Expedited indicates that the organization's Institutional Review Board (IRB) conducts an abbreviated review.
P_APPROVAL_TYPE_ DESC	IN	VARCHAR2	Approval status of the special review item; seeded options include Approved, Pending, or Rejected.
P_APPLICATION_DATE	IN	DATE	Date special review form is filed with special review committee
P_EXEMPTION_ NUMBER	IN	VARCHAR2	Exemption number
P_APPROVAL_DATE	IN	DATE	Date special review committee approves protocol form
P_COMMENTS	IN	VARCHAR2	Descriptive text
X_RETURN_STATUS	OUT	VARCHAR2	Status of the upload; possible values are S = Success, E = Error, and U = Undefined Exception
X_MSG_COUNT	OUT	NUMBER	Total number of error messages stored in the error stack
X_MSG_DATA	OUT	VARCHAR2	Error message text if upload failure occurs due to a single error

Uploading Budgets

The IGW_BUDGETS_PUB package contains the API to upload budget data. This table lists the parameters for the IGW_BUDGETS_PUB.CREATE_BUDGET_VERSION procedure.

Parameter	Usage	Type	Description
P_VALIDATE_ONLY	IN	VARCHAR2	Invokes API in validation mode
P_COMMIT	IN	VARCHAR2	Commits inserted data into Grants Proposal tables
P_PROPOSAL_NUMBER	IN	VARCHAR2	Proposal number
P_START_DATE	IN	DATE	Budget version start date
P_END_DATE	IN	DATE	Budget version start date
P_OH_RATE_CLASS_NAME	IN	VARCHAR2	Rate class; overhead rate classes include MTDC (Modified Total Direct Costs), Total Direct Costs (TDC), or Salary and Wages (S&W)
P_PROPOSAL_FORM_NUMBER	IN	VARCHAR2	Sponsor budget hierarchy
P_TOTAL_COST_LIMIT	IN	NUMBER	Maximum dollar ceiling on a proposal budget
P_TOTAL_COST	IN	NUMBER	Sum of direct costs plus indirect costs for all budget periods; cost of the proposal budget. This amount is requested from the sponsor.
P_TOTAL_DIRECT_COST	IN	NUMBER	Sum of direct costs for all budget periods; costs that are directly attributable to work performed; examples include salaries and travel expenses. This field displays data when the budget status is Complete.
P_TOTAL_INDIRECT_COST	IN	NUMBER	Sum of indirect costs for all budget periods; indirect costs are also known as overhead costs or F&A costs. F&A costs are costs incurred by the organization for conducting research. Sum of costs that support direct costs and cannot be directly attributed to work performed.

Parameter	Usage	Type	Description
P_COST_SHARING_AMOUNT	IN	NUMBER	Amount that the organization cost-shares toward the research project. This field displays data when the budget status is Complete.
P_UNDERRECOVERY_AMOUNT	IN	NUMBER	Amount of overhead costs that an organization does not recover
P_RESIDUAL_FUNDS	IN	NUMBER	Dollar amount of funds that remain from a previous year's budget
P_FINAL_VERSION_FLAG	IN	VARCHAR2	Final budget version submitted for internal routing and approval
P_ENTER-BUDGET_AT_PERIOD_LEVEL	IN	VARCHAR2	If selected, users can enter budget items at the period level, but not at the budget line level
P_APPLY_INFLATION_SETUP_RATES	IN	VARCHAR2	If selected, inflation rates defined during setup are applied to expenditure types
P_APPLY_EB_SETUP_RATES	IN	VARCHAR2	If deselected, users can enter amounts in the Cost and Cost Sharing fields in the Employee Benefits region of the Line Details page
P_APPLY_OH_SETUP_RATES	IN	VARCHAR2	If deselected, users can enter amounts in the Cost and Cost Sharing fields in the Overhead region of the Line Details window.
P_COMMENTS	IN	VARCHAR2	Descriptive text
P_VERSION_NAME	IN	VARCHAR2	Version name
P_DESCRIPTION	IN	VARCHAR2	Version description
P_BUDGET_CURRENCY_NAME	IN	VARCHAR2	Budget currency name
P_BUDGET_TEMPLATE_NAME	IN	VARCHAR2	Budget template name to determine expenditure categories to use
P_PERIOD_NAME1	IN	VARCHAR2	Period 1 name

Parameter	Usage	Type	Description
P_PER_START_DATE1	IN	DATE	Period 1 start date
P_PER_END_DATE1	IN	DATE	Period 1 end date
P_PROGRAM_INCOME1	IN	NUMBER	Period 1 program income, Default = 0
P_PERIOD_NAME2	IN	VARCHAR2	Period 2 name, Default = null
P_PER_START_DATE2	IN	DATE	Period 2 start date, Default = null
P_PROGRAM_INCOME2	IN	NUMBER	Period 2 program income, Default = 0
P_PERIOD_NAME3	IN	VARCHAR2	Period 3 name, Default = null
P_PER_START_DATE3	IN	DATE	Period 3 start date, Default = null
P_PER_END_DATE3	IN	DATE	Period 3 end date, Default = null
P_PROGRAM_INCOME3	IN	NUMBER	Period 3 program income, Default = 0
P_PERIOD_NAME4	IN	VARCHAR2	Period 4 name, Default = null
P_PER_START_DATE4	IN	DATE	Period 4 start date, Default = null
P_PER_END_DATE4	IN	DATE	Period 4 end date, Default = null
P_PROGRAM_INCOME4	IN	NUMBER	Period 4 program income, Default = 0
P_PERIOD_NAME5	IN	VARCHAR2	Period 5 name, Default = null
P_PER_START_DATE5	IN	DATE	Period 5 start date, Default = null
P_PER_END_DATE5	IN	DATE	Period 5 end date, Default = null
P_PROGRAM_INCOME5	IN	NUMBER	Period 5 program income, Default = 0

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

Uploading Budget Periods

The IGW_BUDGET_PERIODS_PUB package contains the API to upload basic budget periods data. This table lists the parameters for the IGW_BUDGET_PERIODS_PUB.CREATE_BUDGET_PERIOD procedure.

Parameter	Usage	Type	Description
P_VALIDATE_ONLY	IN	VARCHAR2	Invokes API in validation mode
P_COMMIT	IN	VARCHAR2	Commits inserted data into Grants Proposal tables
P_PROPOSAL_NUMBER	IN	VARCHAR2	Proposal number
P_VERSION_ID	IN	NUMBER	Budget version identifier
P_START_DATE	IN	DATE	Start date of budget period; budget period default is 12 months.
P_END_DATE	IN	DATE	End date of budget period; budget period default is 12 months.
P_TOTAL_COST_LIMIT	IN	NUMBER	Maximum dollar ceiling on a proposal budget
P_TOTAL_COST	IN	NUMBER	Sum of direct cost plus indirect cost for the budget period; calculated by the system
P_TOTAL_DIRECT_COST	IN	NUMBER	Total direct cost of budget period calculated by the system; costs that can be directly attributable to work performed.

Parameter	Usage	Type	Description
P_TOTAL_INDIRECT_COST	IN	NUMBER	Total indirect cost of budget period calculated by the system; costs that support direct costs and cannot be directly attributable to work performed.
P_COST_SHARING_AMOUNT	IN	NUMBER	Amount that the organization cost-shares toward the research project for the entire proposal budget.
P_UNDERRECOVERY_AMOUNT	IN	NUMBER	Overhead costs that organization does not recover
P_PROGRAM_INCOME	IN	VARCHAR2	Anticipated income generated from project
P_PROGRAM_INCOME_SOURCE	IN	VARCHAR2	Source of anticipated income generated from project
P_PERIOD_NAME	IN	VARCHAR2	Period name
P_CALL_FRM_CR_VERSION	IN	VARCHAR2	Is 'Y' if called from create version routine, Default 'N'
X_RETURN_STATUS	OUT	VARCHAR2	Status of the upload; possible values are S = Success, E = Error, and U = Undefined Exception
X_MSG_COUNT	OUT	NUMBER	Total number of error messages stored in the error stack
X_MSG_DATA	OUT	VARCHAR2	Error message text if upload failure occurs due to a single error

Oracle Grants Proposal Navigation Paths

Navigation

This table shows the navigation path for each setup window in Grants Proposal.

Grants Proposal Setup Window	Navigation Path
Application Forms Package	Setup - Application Forms
Assign Expenditure Categories	Setup - Budgets - Assign Expenditure Categories
Biographical Sketch	Setup - Person - Biographical Sketch
Expenditure Categories	Setup - Budgets - Expenditure Categories/Types
Expenditure Types	Setup - Budgets - Expenditure Categories/Types Click Expenditure Types
Implementation Options	Setup - Implementation Options
List of Questions	Setup - Questions
Organization Details	Setup - Organization Details
Organization Questions	Setup - Organization Details Select Organization Details Tab Click Organization Questions
Organization Types	Setup - Organization Details Select Organization Details Tab Click Organization Types
Question Detail	Setup - Questions Click Open or New
Rate Classes and Rate Types	Setup - Budgets - Rates
Rates	Setup - Budgets - Rates Click Rates
Sponsor Budget Hierarchy	Setup - Budgets - Sponsor Budget Hierarchy

Glossary

194 grant or assistance application

The electronic standard established by the federal government for transmitting a grant proposal via EDI.

Abstract

A summary of the proposal that the government publishes. An abstract is approximately 250 words and is public information.

Activity type

Type of activity that the proposed research is requesting funding for. Examples of activity types include Research for research grants, Instruction for instructional or training grants, Fellowships for supporting postdoctoral fellows, Public Service for a public service project, Student Service for a research proposal supporting students, and Hospital.

Agency

A funding source; typically a government agency.

Applicant unit

The organization through which the proposal is developed and administered. The proposal manager is affiliated with the lead unit.

Approval hierarchy

A ranking of approval organizations, starting with the organization preparing the proposal and ending with the sponsor organization.

Approved proposal

A proposal, which includes proposal data, a narrative module, and a budget, that has been internally approved and shows a proposal status of Approved in the header region of the Proposals window.

Approver

Persons who receive proposals for review and approval.

Award

Grant or contract received by an organization, which is used to fund one or more projects. An award is a funding installment, which typically represents a budget year.

Award amount

Total of all installments.

Award budget

A detailed estimate of the cost of that portion of a project funded by a particular award.

Award roles

User-defined functions that people perform in activities funded by an award. Typical award roles include Award Manager, Principal Investigator, Technician, Research Assistant, and Post-Doctoral Fellow.

Award template

Predefined award data that repeats from award to award and is used to simplify and standardize award entry. Users typically create an award template for each funding source.

Award terms and conditions

Sponsor-determined requirements for managing an award. Typical examples of award terms and conditions categories include confidentiality, intellectual property, publications, salaries, and travel.

Award type

An implementation-defined classification of awards. Typical award types include federal grants and private grants.

Baselining

The process of approving a budget for use in reporting and accounting.

Biographical sketch

Educational, research, and professional experience information about an individual.

Budget

An estimate of cost for a task or project.

Capital project

A project that tracks asset development activities and costs, and capitalizes costs when the asset is placed in service.

Commercial and Government Entity (CAGE)

The Commercial And Government Entity (CAGE) Code is a five-digit, numeric identification code assigned to manufacturers which have previously or are currently producing items used by the Federal Government.

Condition

The sum of all expressions relating to a business rule. A condition can include one or more expressions.

Data Universal Numbering System (DUNS)

Data Universal Numbering System, a 9-digit non-indicative identification number (e.g., 75-000-0018) assigned by Dun & Bradstreet to separate commercial entity in the Dun & Bradstreet database.

Data Universal Numbering System+4 (DUNS+4)

DUNS+4, a more specific 13-character identifier than the original 9 digit DUNS, has been available in CCR in order to identify subsidiaries and/or divisions at separate addresses from the registered

Department of Defense Activity Address Code (DODAAC)

A code number given by Department of Defense.

Descriptive flexfield

A field that users can extend to capture extra information not otherwise tracked by Oracle Applications. A descriptive flexfield appears on a form as a single character, unnamed field. Users can customize this field to capture additional information unique to its business.

Direct costs

Costs that are directly attributable to work performed. Examples of direct costs are salaries and travel expenses.

Employment benefit (EB) rates

The sum of all fringe benefits that institutions are required to pay, such as disability insurance, life insurance, health insurance, and workmen's compensation. Employment benefit rates are expressed as a fixed percentage of salary and may differ by type of employee, such as faculty and non-faculty employees. Employment benefit rates are typically defined for each fiscal year for which a proposal is developed.

Expenditure category

User-defined cost classifications to which expenditure items are assigned.

Expenditure type

User-defined cost classifications that are assigned to each expenditure item.

Expression

A mathematical combination of symbols in a business rule that has a left hand side value and a right hand side value separated by a mathematical operator, such as $>$, $<$, or $=$.

Facility and administration cost rates (F&A)

A federal government term that refers to indirect costs. F&A rates are recovered by the institution from the funding source, usually as a percentage of the direct costs. The institution negotiates F&A rates with the federal government for a four to five year period. The F&A rates are institution specific, not grant specific and may differ by the type of research conducted. See *indirect costs*, *overhead*, and *F&A cost rates*.

Funded amount

The total of all active installments.

Funding source

A governmental agency, a private firm, or an individual that provides funding for a project.

Grantee

The receiver of a grant.

Grantor

A person or organization that makes a grant.

Indirect costs

Costs that support direct costs and cannot be directly attributed to work performed. Examples of indirect costs are fringe benefits, office space, and general and administrative costs.

Inflation rate

Percentages that adjust for inflation increases on proposal budget items. Inflation rates are applied to most salary and non-salary budget items, except equipment. They are typically defined for each fiscal year for which a proposal is developed.

Installment

A portion of the total award funding, which is received in fixed amounts at specified intervals.

Institution Profile File

Institution Profile File code is number given by US government agencies to the institutions .

Institutional Review Board (IRB)

A committee in each organization that focuses on research protocol. The institutional review board assigns a protocol number to the proposal after reviewing and approving the protocol form.

Key person

An employee who is assigned an important role on the project for which the proposal is submitted.

Keywords

User-defined identifiers used in preparing the proposal.

Modified total direct costs (MTDC)

A rate class expressed as a percentage. This percentage is negotiated with the federal government and is used to calculate indirect costs. A class of overhead, which is the sum of all direct costs minus equipment, capital expenditure, tuition remission, scholarships, fellowships, rental costs of off-site facilities, patient care costs, and consortium or contractual costs in excess of \$25,000 for each funding cycle.

Module

A section or chapter of the narrative portion of the proposal.

Multi-funding

A feature that allows users to fund multiple projects from a single award and a single project from multiple awards.

Narrative

The research plan portion of the proposal. Specific sections of the narrative are typically written by different members of the project team. These sections are called narrative modules.

National Science Foundation (NSF)

NSF is a public institution whose acronym is used in the Grants Proposal Application.

Notification business rule

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

Office of sponsored programs (OSP)

The proposal approval authority for the organization. The OSP reviews proposals and accepts awards from the funding source.

Organization

The levels, departments, or schools within an organization.

Overhead, Overhead rates

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

Overhead type

Type of overhead. Examples include modified total direct costs and salary and wages.

Process

An activity or set of activities that run in the background to accomplish a specific goal.

Project Budget

A detailed estimate of the cost of a project. A project budget is the aggregate of all the award budgets that fund a project.

Project funding

An allocation of funds, generated revenue amounts, and invoiced amounts from an award to a project or top task.

Project template

Predefined project data. A project template includes basic and variable project data, the work breakdown structure, project and task options, funding data, and budgets.

Project type

A project classification that is defined during implementation that specifies essential project attributes. Users define a project type for each project.

Proposal

A collection of documents that is submitted to a funding agency for the purpose of obtaining funding for a research project. A proposal includes a research plan, a budget, information on key project personnel, an abstract that describes the project, and other supporting documents. A proposal is a written plan and justification in which the

organization informs the prospective funding source what it needs in terms of budget items, equipment, supplies, and personnel to conduct specific research.

Proposal budget

An estimate of the direct and indirect costs of conducting the proposed research. A proposal budget can be for one or multiple budget periods.

Proposal manager

A title or role that allows the designee to create the proposal. The Proposal Manager may also be the Proposal Owner.

Proposal owner

A title or role that allows the designee to submit proposals and apply for research funding.

Proposal role

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

Proposal stop

An office or department within the organization that reviews specific proposal information.

Purpose code

A user-defined description of an activity that an award is funding. Purpose codes are used to identify the purpose of award funds. Typical examples include descriptions such as research, clinical trial, and sponsored training.

Rate

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

Rate class

A subset of a system-defined rate class type. Examples of rate classes that are subsets of overhead rates include Modified Total Direct Costs, Total Direct Costs, and Salary and Wages.

Rate class type

A subset of a rate class. Examples of rate types include Inflation, Employee Benefits, or Overhead.

Report

Sponsor-specific grant application pages that can be printed individually.

Residual funds

Dollar amount of funds that remain from a previous budget period. Residual funds are also called carry-over funds.

Resource

Labor, services, materials, and equipment needed to track, complete, and account for project work.

Resource list

A set of similar resources used on specific kinds of project work.

Routing business rule

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

Salary and wages (S&W)

A rate class expressed as a percentage. This percentage is used to calculate indirect costs based on salary and wages only. See *salary and wages*.

Sponsor

A funding source. A sponsor can be a governmental agency, a private firm, or an individual.

Supplement

An installment type. Additional award funds.

Total direct costs (TDC)

A rate class expressed as a percentage. This percentage is determined by the organization and is used to calculate indirect costs. Directs costs are costs that are directly attributable to work performed. Examples of direct costs are salaries and travel expenses. Total direct costs are the sum of all direct costs associated with a proposal. See *TDC*.

Underrecovery

An amount that represents the overhead costs that the organization is not able to recover because the proposal is prepared with a smaller overhead rate.

Validation business rule

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

