

The bolt-on page was developed to capture information critical to accounting to meet state reporting requirements. Additionally these pages eliminated the need for departments to maintain various spreadsheets of data relevant to their areas. While existing grant data, financial transactions and balances were migrated directly from FRS, attributes such as begin/end dates, division, subdivision along with the data required to populate the fields on the bolt-on page, were added by spreadsheet upload. All data required to set up a new grant in the chart of accounts will be gathered going forward by a revised grant request form. The path to view these pages:

Set Up Financials->Common Definitions->Design Chartfields->Define Values->Chartfield Values and select the Grant/Project option brings up the following:

Project	TU Grant Setup	TU Fixed & Admin	TU Reporting Schedule	Description
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Grant/Project

SetID: TOWSN
Grant/Project: 5040242
***Description:** Michigan Project FY10 ***Status:** Active
***Start Date:** 07/01/2009
***End Date:** 06/30/2010 **Summary Project**

Project Manager			Customize	Find	View All	First	1 of 1	Last
*Effective Date	*Manager	Manager Name						
<input type="button" value="31"/>	<input type="text"/>							<input type="button" value="+"/> <input type="button" value="-"/>

Project Status			Customize	Find	View All	First	1 of 1	Last
*Effective Date	*Project Status							
01/01/1901 <input type="button" value="31"/>	Open <input type="button" value="31"/>							<input type="button" value="+"/> <input type="button" value="-"/>

2. Clicking on the TU Grant Set-Up TAB displays the following:

TU GRANT SETUP		Find	View
Effective Date	01/01/1901 <input type="button" value="31"/>	*Status	Active <input type="button" value="31"/>
Responsible Person	0280399 <input type="button" value="31"/> Kolesnikov,Alexei		
Email Address	AKolesnikov@towson.edu		
Account Purpose	SR <input type="button" value="31"/> Services		
TU Grant Sponsor	University of Michigan		
Funding Type	UNI <input type="button" value="31"/> University		
Grant Source	21 <input type="button" value="31"/> Other State Government		
Cash Match Required	NO <input type="button" value="31"/>		

The TU Grant Set-Up Page shown above captures the following options:

Account Purpose

SR – Services	RA – Research Applied	PR – Performance	OP - Operations
TR – Training	RB – Research Basic	CF – Conference	OE - Other
CU – Curriculum	EQ – Equipment	OR - Outreach	

Funding Type

FED – Federal	LGV – Local Gov	NPC – Non Profit Corp
SOM – State of MD	OSG – Other State Gov	FPC – For Profit Corp
USM – University Sys	FND – Foundation	For – Foreign Org
UNI – University	MCH – Medical Ctr	FGV – Foreign Gov
IND – Individual		

Grant Source

10 – Financial Aid Federal Direct	16 – Research Federal Pass Through	21 – Other State Gov
12 – Research Federal Direct	18 – Other Federal Pass through	22 – Local Gov
14 – Other Federal Direct	20 – State Government	30 - Private

Cash Match

Yes or No – if University required to match certain dollar amount of Grant

3. Clicking on the TU Fixed and Admin TAB displays options specific to how the Indirect Cost Percentages are determined for the Grant.

The screenshot shows a web form titled "FIXED & ADMIN BASE". At the top right, there are navigation controls: "Find | View All", "First", "1 of 1", and "Last". Below these are two small buttons, "+" and "-". The main content area contains four radio button options: "Salary and Fringe", "Total Direct Cost", "Total Modified Direct Cost", and "None". The "None" option is selected, indicated by a filled radio button. Below the radio buttons is a text input field labeled "Facilities Admin Rate Per".

4. Clicking on the TU Reporting Schedule TAB displays the following:

The TU Reporting Schedule Page shown above captures the following options:

Fiscal & Technical Reporting Schedules

- | | |
|------------------------|------------------------|
| AN – Annual | IQ – Invoice Quarterly |
| AR – As Required | MO - Monthly |
| BA – Bi-Annual | NR – Not Required |
| DL – Deliverables | OT - Other |
| FQ – Federal Quarterly | QU - Quarterly |
| FI – Final | RI – RESI Invoice |
| IN – Invoice | TD – To Be Determined |
| IM – Invoice Monthly | |

Payment Terms

- | | | |
|----------------|-----------------------|-----------|
| IN – Invoice | PP – Pre-Payment | NO - None |
| AU – Automatic | FD – Federal Drawdown | |

Frequency of Invoice

- | | |
|---------------|----------------------|
| M – Monthly | F – Federal Drawdown |
| Q – Quarterly | O – Other |

Exchange

- EX – Exchange: Grant money awarded for a product or service
 Non-Exchange: Grant money awarded with no defined expectations

Taxable or Non-Taxable

Whether service performed for profit outside university’s mission statement