

Grant Query Forms

This document explains how to use the various grant query forms to view grant information.

Objectives

After completing this session, you will be able to:

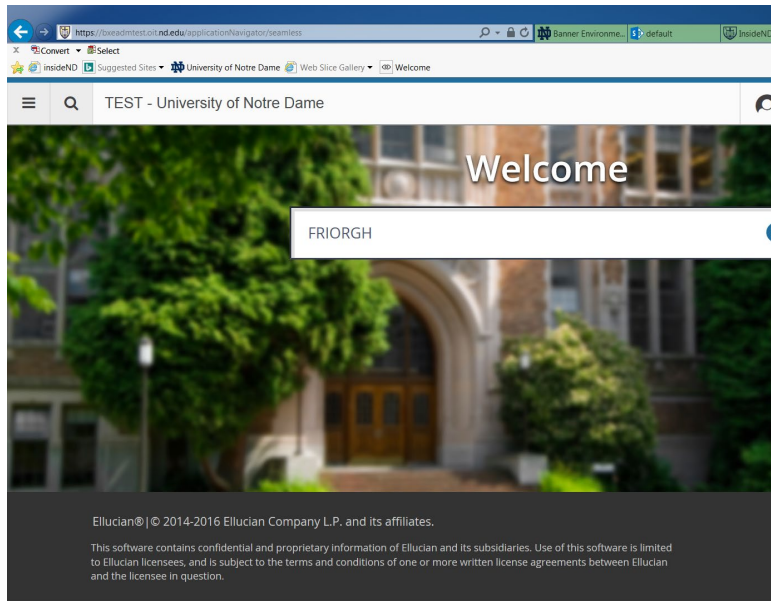
- Query grant organization information using FRIORGH
- Query Grant code setup information using FRAGRNT (PI, agency, grant status)
- View grant inception-to-date budget status of a grant fund using FRIGITD
- View grant transaction detail using FRIGTRD
- Query fiscal year-to-date transactions on a grant
- Generate grant inception-to-date report using FRRGITD

Introduction to Grant Information

The Research Accounting module enables you to track grants from the time you submit a proposal to a funding agency through the award and disbursement process. This module also enables you to perform reporting functions after you receive a grant award.

Grant Organization Inquiry (FRIORGH)

- For the most direct access: From the main page in the Search Box type **FRIORGH** and press **Enter**.

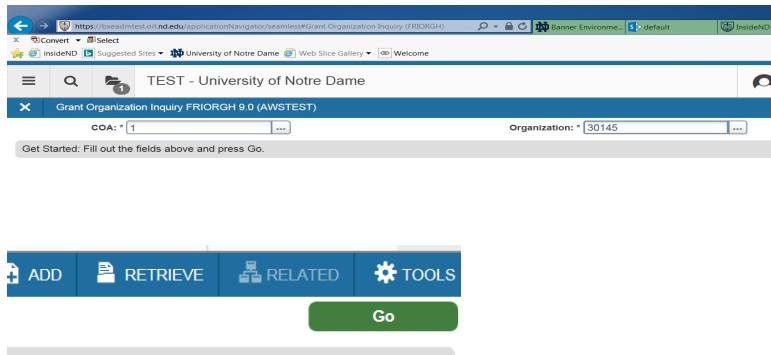


- Enter the following information in the Key block:

COA field enter **1**.

Organization code.

- Click **Go**



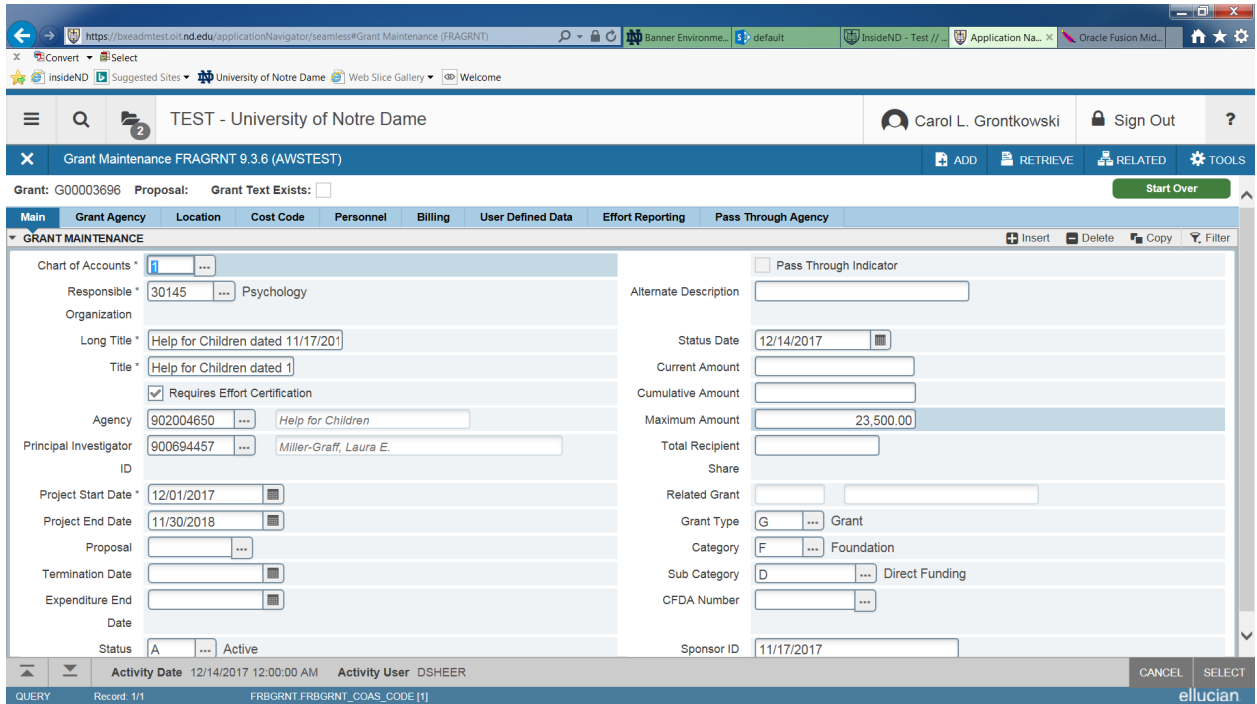
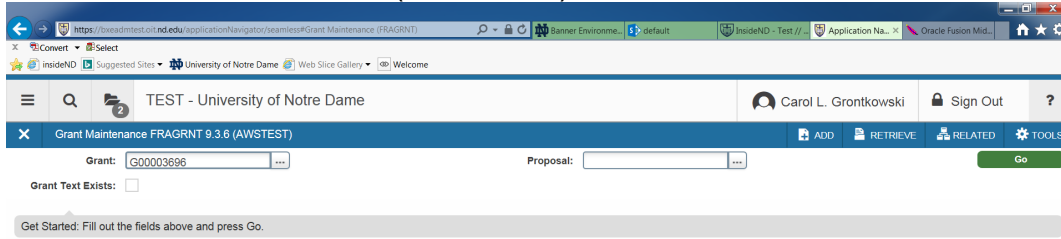
Note: Click on column headers to sort in ascending or descending order. Use the down arrow to navigate to additional records.

Grant	Description	Status	Date	Project Start	Organization	Description	Proposal	Maximum Amount
N46266	ADMIN CHILD YOU	I	09/30/2002	09/30/2002	30145	Psychology		
G00000179	APA Editorial Office Expenses	I	03/21/2007	01/01/2007	30145	Psychology		279,160.00
G00000120	APA Office Expense Fund	I	12/08/2006	01/01/2007	30145	Psychology		7,500.00
GENERAT...	APA Office Expense Fund	I	12/08/2006	01/01/2007	30145	Psychology		7,500.00
G00001445	APF 2011 Visionary Fund Grant	I	07/08/2011	07/08/2011	30145	Psychology		16,514.00
N45917	ARMY DASW01-02-K	I	04/25/2007	05/01/2002	30145	Psychology		201,062.00
G00002275	Autism Science Foundation UNDG14-09	I	05/01/2014	05/01/2014	30145	Psychology		3,000.00
G00002729	Bowsher Booher Foundation-Valentino	I	07/01/2015	07/01/2015	30145	Psychology		5,000.00
FY12BRD...	Bridge Funding for FY12	A	09/07/2011	09/07/2011	30145	Psychology		10,000.00
FY12BRD...	Bridge Funding for FY12	A	12/12/2011	12/12/2011	30145	Psychology		30,000.00
FY13BRD...	Bridge Funding for FY13	I	07/01/2012	07/01/2012	30145	Psychology		9,000.00
N48080	CATTELL FUND	I	09/06/2005	09/01/2005	30145	Psychology		32,000.00
G00001955	CTB McGraw Hill No. 00000399.2	I	01/01/2013	01/01/2013	30145	Psychology		71,250.00
G00001403	CTB/McGraw Hill Contract No. 339.1	I	01/01/2011	01/01/2011	30145	Psychology		83,370.00
G00002205	CTB/McGraw-Hill 00000399.2	I	01/01/2014	01/01/2014	30145	Psychology		38,736.00
G00001085	CTB/McGraw-Hill-CTB #06408-DC10-000	I	01/01/2010	01/01/2010	30145	Psychology		80,000.00
FY12CTSID	CTSI Projects for FY12	I	08/01/2011	08/01/2011	30145	Psychology		

To review Grant Detail, go to **Related** and Select **Grant Information (FRAGRNT)**

Carol L. Grontkowski Sign Out ?
 ADD RETRIEVE RELATED TOOLS
 Search
 Proposal Information [FRAPROP]
 Grant Information [FRAGRNT]

On the Grant Maintenance (FRAGRNT), click Go



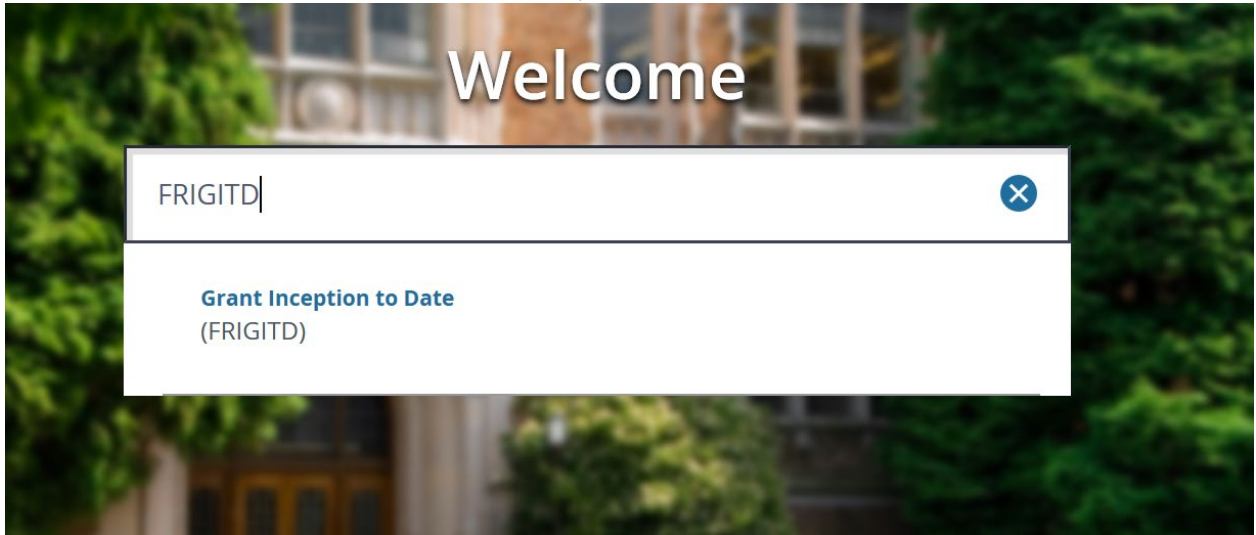
Use the Tabs to access other Banner pages from this form

The screenshot shows the Banner Maintenance FRAGRNT 9.3.6 (AWSTEST) Personnel form. The browser address bar shows the URL: https://bxeadmtest.oit.nd.edu/applicationNavigator/seamless#Grant Maintenance (FRAGRNT). The user is Carol L. Grontkowski. The form is for Grant: G00003696, Proposal: Grant Text Exists: . The Personnel tab is active, showing details for Laura E. Miller-Graff (ID: 800694457). The form includes fields for Indicator (001 - Primary Investigator), Chart of Accounts (1), Organization (30145 - Psychology), Salutation, Title, Address Type, Address Sequence, Number, Phone Type, Phone Sequence, E-mail, Billing or Report, Format, Full Time, Equivalency, and Employee. The bottom of the form shows navigation controls and a 'Record 1 of 1' indicator.

The footer bar contains navigation arrows, a URL: https://bxeadmtest.oit.nd.edu/BannerAdmin?form=FRJORGH&ban_args=&ban_mode=xe#tabfragrnt1TabCanvas-page_costCodeInformation, and buttons for CANCEL and SELECT. The elucian logo is visible in the bottom right corner.

FRIGITD- To query Grant Activity and Balance

1. Enter FRIGITD in the Search Box, click Enter



2. Fill out the fields and press GO.

The screenshot shows a web browser window displaying the 'Grant Inception to Date FRIGITD 9.3.6 (AWSTEST)' form. The form includes the following fields and options:

- Chart of Accounts: 1
- Grant Year: 16
- Fund: [empty]
- Program: 10000
- Location: [empty]
- Account: [empty]
- Date From (MM/YY): [empty] / [empty]
- Include Revenue:
- Accounts: [empty]
- Hierarchy:
- By Sponsor Account:
- Grant: G00003678
- Index: [empty]
- Organization: 35030
- Activity: [empty]
- Account Type: [empty]
- Account Summary: All Levels
- Date To (MM/YY): [empty] / [empty]
- Exclude Indirect:
- Costs: [empty]
- Fund Summary:

A 'Go' button is located at the top right of the form area. Below the form, there is a status bar showing 'EDIT Record: 1/1 FORFPHIC KEYBLOC_GRNT_CODE (1) ellucian'.

3. FRIGITD

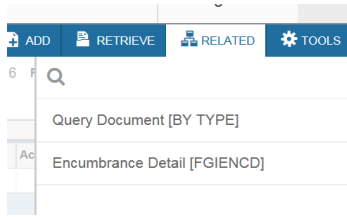
Account	Type	Description	Adjusted Budget	Activity	Commitments	Available Balance
71171	E	Advertising	0.00	100.00	0.00	-100.00
NET TOTAL						
		Adjusted Budget	0.00	Activity	Commitments	Available Balance
			100.00	0.00	-100.00	

4. Highlight record and press Related and Grant Detail Information

5. Grant Transaction Detail by Account Code – use the scroll bar at the bottom to view additional columns

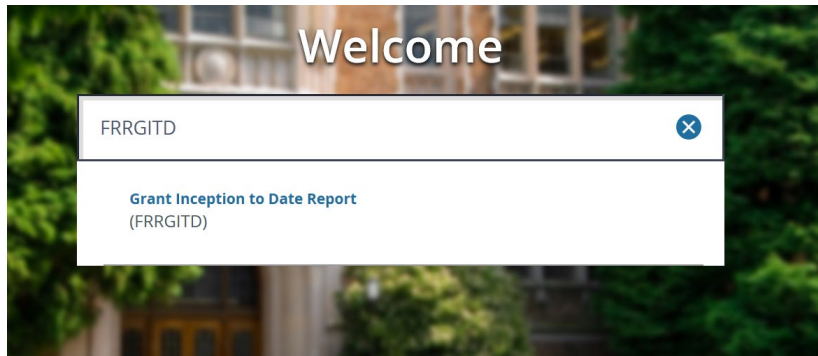
Account	Organization	Program	Activity Date	Type	Document	Description	Commit	Fund	Activity	Location	Transaction Date
71171	35030	40000	05/02/2017	DNNI	I0444194	Wiest, Olaf G.	U	371506			05/03/2017
71171	35030	40000	05/02/2017	INNI	TE234395	Wiest, Olaf Guenter.	U	371506			05/02/2017

6. Select the record and under Related menu select Query Document

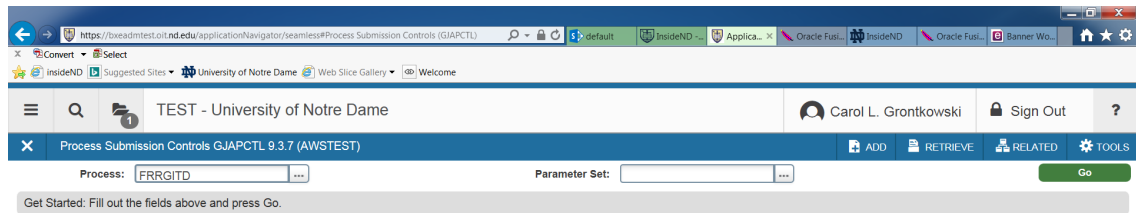


Processing a Banner Report

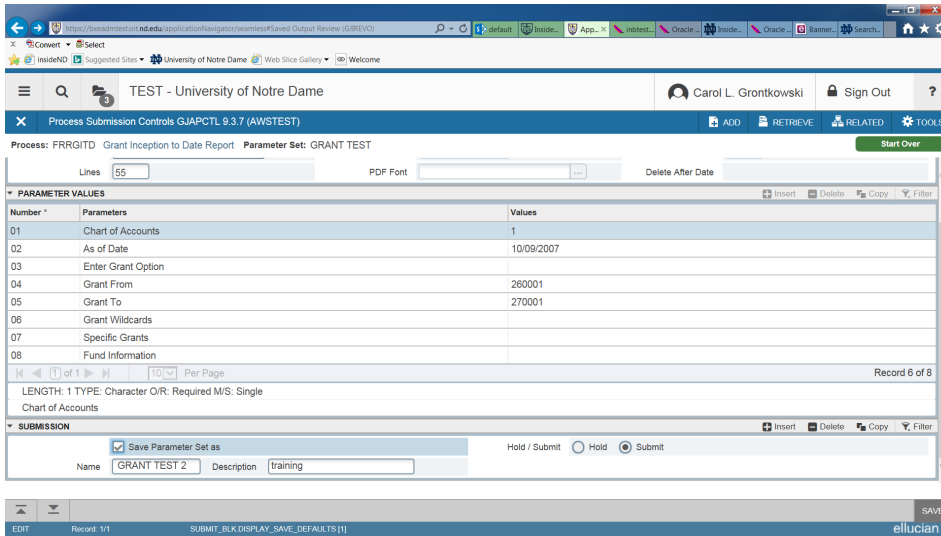
1. Enter in the Search Box FRRGITD and press enter.



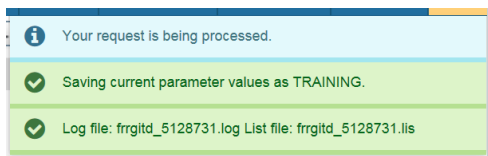
2. On the GJAPCTL form, click GO



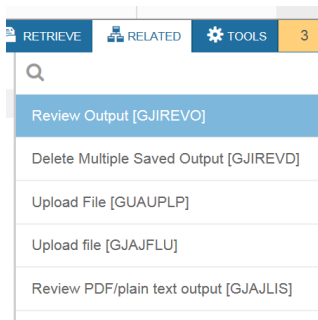
3. Enter DATABASE in the Printer Control section.
4. Enter Parameter Values
 - a. Chart of Accounts = 1
 - b. As of Date – Select Date
 - c. Grant From - 260001
 - d. Grant To - 270001
5. Use arrow to navigate to the Submission section
 - a. If you want to save the parameter values you have just entered, click Save Parameter. Enter Name and Description



6. Click SAVE
7. Message regarding status of report



8. Go to Related and Review Output



9. Double-click in the File Name field and it will display output files. Select .lis file to view the report. Click OK
10. To view the report in a web browser, select Tools and Show Document

RETRIEVE RELATED TOOL

ACTIONS

Refresh F5

Export Shift+F1

Print Ctrl+P

Clear Record Shift+F4

Clear Data Shift+F5

Item Properties

Display ID Image

Exit Quickflow

About Banner

OPTIONS

Show Document (Save and Print File)

11. To show report in web browser select Yes

! You have selected to Show File (frgtd_5128731.lis) in a browser. Do you wish to continue?

University of Notre Dame
 Grant Inception to Date Report
 AS OF 03-09-2008

CHART: 1 Notre Dame GRANT: M44440 SMURFIT-STONE
 PI/MANAGER: Steven B. Skear PROJECT PERIOD: 01-JAN-2003 - 31-DEC-2008
 AGENCY: Smurfit-Stone

ORGN	ACCOUNT	ACCOUNT TITLE	ADJUSTED BUDGET	CURRENT PERIOD ACTIVITY	INCEPTION TO DATE ACTV.	COMMITMENTS	AVAILABLE BALANCE
31005	52300	Grants Revenue Private	.00	2,289.87	40,875.68	.00	-40,875.68
31005	52399	Crosswalk	126,000.00	.00	74,074.94	.00	51,925.06
	TOTAL	Grants and Contracts	126,000.00	2,289.87	115,950.62	.00	10,949.38
31005	63020	Graduate Administrative	98,399.00	1,542.00	70,304.98	.00	28,094.02
	TOTAL	Salaries and Wages	98,399.00	1,542.00	70,304.98	.00	28,094.02
31005	6500	Benefits	450.00	.00	.00	.00	450.00
31005	65980	Medical	.00	.00	150.00	.00	-150.00
	TOTAL	Benefits	450.00	.00	150.00	.00	300.00
31005	72001	Supplies	7,216.00	.00	4,132.42	1,532.00	1,551.58
31005	72781	Lodging and Meals	.00	.00	144.00	.00	-144.00
31005	75010	Indirect Cost	54,035.00	747.87	37,442.84	.00	16,392.16
	TOTAL	Supplies and Expense	61,251.00	747.87	41,939.26	1,532.00	17,739.74
31005	77010	Airfare (Domestic)	4,400.00	.00	2,066.40	.00	2,393.60
31005	77030	Ground Transportation (D	.00	.00	300.00	.00	-300.00
	TOTAL	Travel	4,400.00	.00	2,366.40	.00	2,093.60

Grant Code Inquiry (FRIGRNT)

The Grant Code Inquiry form allows you to view grant setup information.

1. For the most direct access: From the Main Menu page, in the Go field type **FRIGRNT** and press **Enter**.

The Grant Organization Inquiry form (FRIGRNT) opens.

2. Enter *a Grant code*.
3. **EXECUTE QUERY**.

Grant Code Inquiry FRIGRNT 7.0 (BNRPPRD7)

Grant:	1047725	NEA 05-7000-7011			
Principal Investigator ID:	900518010	Cardenas Gilberto			
Agency:	901349662	National Endowment for the Arts			
Current Amount:	20,000.00	Cumulative Amount:			
Status:	A	Status Date:	15-FEB-2005	Maximum Amount:	20,000.00
Project Start Date:	01-JAN-2005	Project End Date:	31-DEC-2006	Sponsor ID:	NATIONAL ENDOWMENT FOR ARTS
Responsible Organization:	1 28030	Institute for Latino Studies			

The query results are returned.

Grant Code:	Grant code and title
Principal Investigator ID:	Principal investigator—the faculty or staff person assigned responsibility for managing research and financial activity associated with a grant funded by a government or other external agency or sponsor
Agency:	Name of government or other external agency funding the grant
Status:	Active or Inactive
Responsible Organization:	Organization code

Finding a Current Balance on Grants using FRIGITD

The FRIGITD allows you to view inception-to-date budget status of grant/contract funds where activity generally overlaps fiscal years. The Grant Inception to Date form (FRIGITD) enables you to view account type information, including adjusted budgets, inception-to-date actual activity, encumbrance, and available balance amounts in the 2xxxxx Fund code range.

Helpful hints for FRIGITD:

The **Grant Year** field is not the fiscal year, it is the year of the grant (i.e. 1=first year, 2=second year).

The **Date From** and **Date To** fields are system generated. To change them to a calendar range (for example, July 2004 to October 2004):

- **ROLLBACK**
- In the Date From field enter **07 04**
- In the Date To field, enter **10 04**

Oracle Developer Forms Runtime - Web: Open > FRIGITD

File Edit Options Block Item Record Query Tools Help

Grant Inception to Date FRIGITD 7.1 (BNRPPRD7)

Chart of Accounts: 1 Fund: Grant: Organization: Grant Year:

Index: Fund: Activity: Location: Fund Summary

Program: Account Type: Account: Account Summary: All Levels Hierarchy

Date From (MM/YY): / Date To (MM/YY): / By Sponsor Account

Include Revenue Accounts

- **NEXT BLOCK**

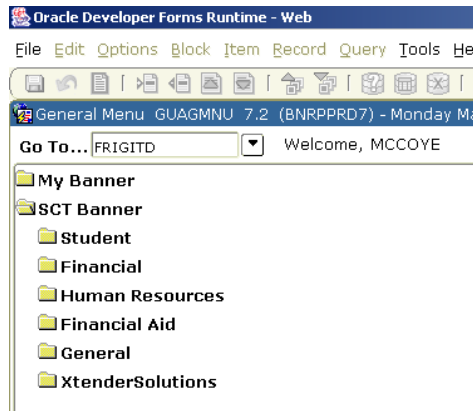
To view detailed transaction information on FRIGITD:

1. Access FRIGITD using one of these methods:

For the most direct access: From the Main Menu page, in the Go field type **FRIGITD** and press **Enter**.

OR

From the Main Menu page select: **Financial System > Research Accounting > Research Accounting Grants > Grant Inquiry > Grant Inception to Date**.



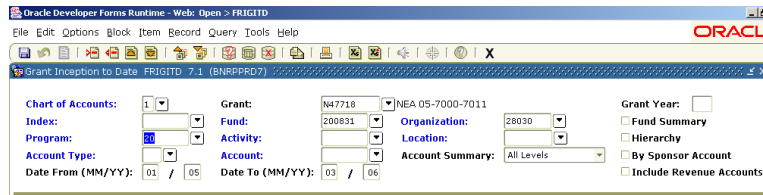
2. In the Key block:

In the COA field enter **1**.

Enter **the Grant Number**.

NOTE: The Year field refers to the year of the grant (1st, 2nd, 3rd), not the calendar or fiscal year. **Leave this field blank**.

Do **not** include revenue account (**leave unchecked**).



3. **NEXT BLOCK.**

Information block:

Account Type			Adjusted Budget	Activity	Commitments	Available Balance
65100	L	Social Security	0.00	227.80	0.00	-227.80
71175	E	Photographic Services	0.00	50.00	0.00	-50.00
71258	E	Professional-Consulting	20,000.00	15,000.00	0.00	5,000.00
Net Total:			20,000.00	15,277.80	0.00	4,722.20

Account:	Displays the Account codes sequentially
Type:	L=Labor; E-Expense, R=Revenue, T=Transfer
Desc:	Account code description
Adjusted Budget:	Current adjusted budget for the Account code
Activity:	Grant inception-to-date activity
Commitments:	Current encumbrance total for the Account code
Available Bal:	Remaining budget
Net Total:	The total of the records in each column

NOTE: Once you have received the grant inception-to-date information, **ROLLBACK** to return to the Main block and adjust the date range for a specific period.

To view detailed information about a particular account using FRIGTRD:

FRIGTRD is the companion form to the FRIGITD, Inception to Date budget status form. FRIGITD is used to view inception-to-date transaction activity for grant/contract funds in the 2XXXXX fund code range.

1. Click in the **Activity** field, which will highlight the row.

Grant: Inception to Date FRIGITD 7.1 (BNRPPRD7)

Chart of Accounts: 1 Grant: N47718 NEA 05-7000-7011
 Index: Fund: 200831 Organization:
 Program: 20 Activity: Location:
 Account Type: Account:
 Date From (MM/YY): 01 / 05 Date To (MM/YY): 03 / 06 Account Summary:

Account Type	Adjusted Budget	Activity
65100 L Social Security	0.00	227.80
71175 E Photographic Services	0.00	50.00
71258 E Professional-Consulting	20,000.00	15,000.00

2. From the **Options** menu, select **Grant Detail Information**.

Oracle Developer Forms Runtime - Web: Open

File Edit Options Block Item Record Que
 Grant Detail Information
 Grant: 1 Format Display Preferences (BN

Chart of Accounts: 1 C
 Index: F
 Program: 20 A
 Account Type: A
 Date From (MM/YY): 01 / 05 C

3. **NEXT BLOCK.**

FRIGITD will show all activity (budget, encumbrances, and expenses).

Grant Transaction Detail Form FRIGTRD 7.0 (BNRPPRD7)


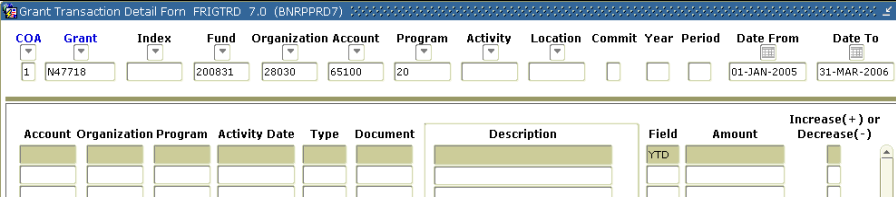
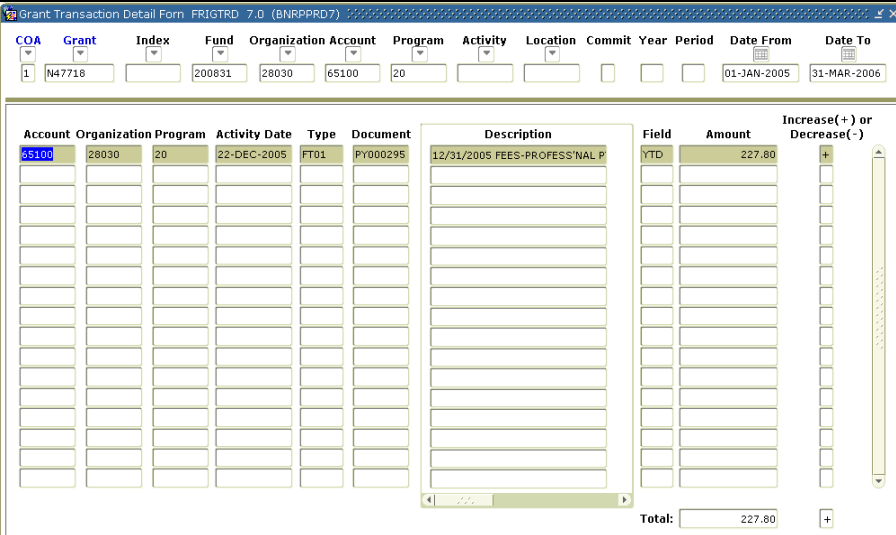
COA: 1 Grant: N47718 Index: Fund: 200831 Organization: 28030 Account: 65100 Program: 20 Activity: Location: Commit: Year: Period: Date From: 01-JAN-2005 Date To: 31-MAR-2006

Account	Organization	Program	Activity Date	Type	Document	Description	Field	Amount	Increase(+) or Decrease(-)
65100	28030	20	22-DEC-2005	FT01	PY000295	12/31/2005 FEES-PROFESS'NAL P	YTD	227.80	+
Total:								227.80	+

Scroll to view all of the information.

Account:	Displays the Account codes sequentially
Organization:	Organization code
Program:	Program code
Activity Date:	Date transaction record was entered in the Finance System
Type:	Rule Class code
Document:	Displays the transaction Document number
Description:	Displays the description
Commit:	
Fund:	Fund code
Activity:	Activity code
Loc:	Location code
Transaction Date:	Date the transaction was posted in the system
Field:	Field column displays the following codes: YTD (year-to-date), OBD (original budget), ENC (encumbrances)
Amount:	Displays the transaction amount
Increase or Decrease:	Displays (+) for increase (-) for decrease

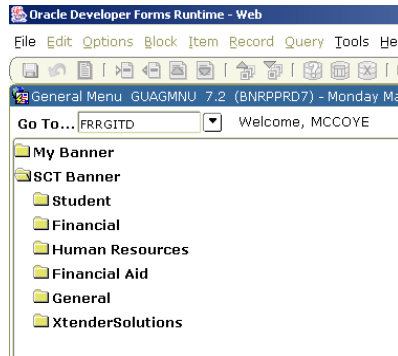
To view only year-to-date transactions using FRIGTRD:

<p>1. Click ROLLBACK.</p> <p>2. Enter the report criteria (COA, Grant, Date From and Date To).</p> <p>3. NEXT BLOCK.</p>	
<p>4. In the FLD column in the Information block area, enter YTD.</p>	
<p>5. EXECUTE QUERY.</p> <p>FRIGTRD will show only year-to-date transactions. You must scroll down to see final total.</p>	
<p>6. <u>To get to the last record for the grand total of what has been spent to date, from the Options menu select Query</u></p>	

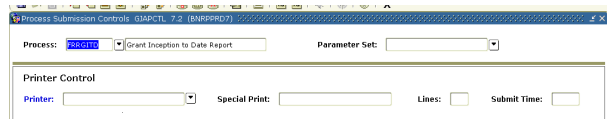
<p>Total for all Records.</p> <p>7. <u>To return to FRIGITD</u>, click on the Exit icon on the toolbar.</p>	
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Grant Inception-to-Date Report Using FRRGITD

- From the Main Menu page, in the Go field type **FRRGITD** and press **Enter**.



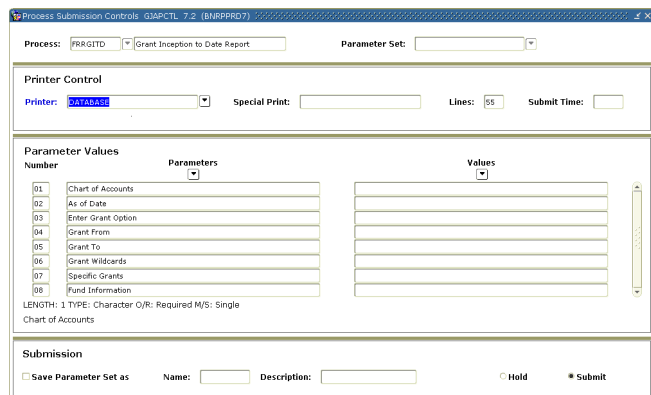
- On the GJAPCTL form, **NEXT BLOCK** to the Printer Control block.



- In the Printer field, enter **Database**.

Enter any of the following Parameter Values:

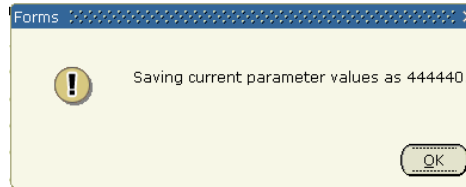
01	COA (Required) Enter 1
02	As of Date (Hint: Enter q and it will fill in today's date.)
03	Grant Option (Enter s for specific grant or r for range of grant funds)
04	Grant From
05	Grant To
06	Grant Wildcard
07	Specific Grants
08	Fund Information



4. **NEXT BLOCK** to the Submission area.

5. To save this report:
 - a. Click the **Save Parameters** check box.
 - b. In the As field, enter a name for the report.
 - c. **SAVE**

6. Click **OK** to the Report Number message.

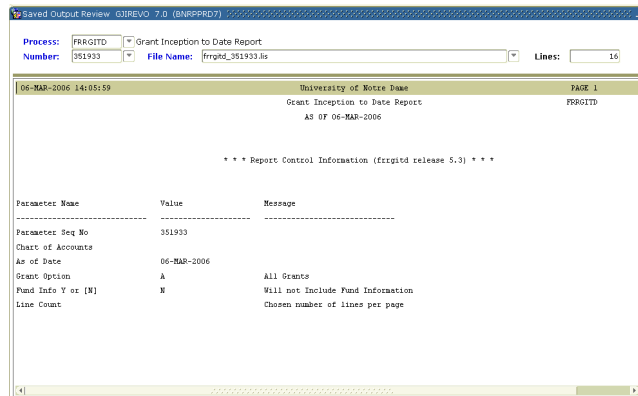
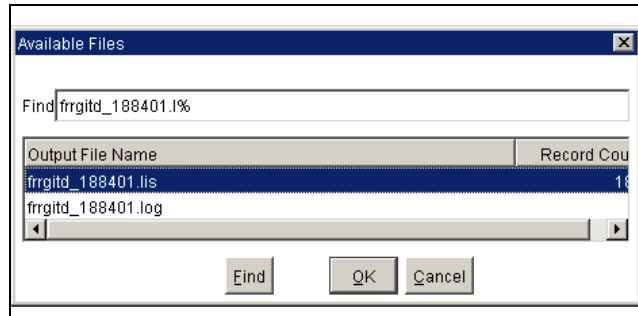


7. **SAVE.**

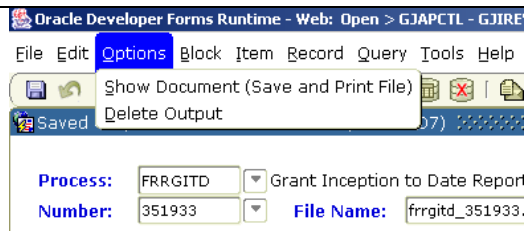
The Auto Hint/Status Bar will display the report output file name.

8. From the **Options** menu, select **Review Output**.

- 9.
10. Double-click on **the output file name** (in this instance, frrgitd_188401.lis) to open and review the report.
11. Click **OK**.



12. To open the report in your browser, from the **Options** menu select **Show Document (Save and Print File)** to display the report in the browser window.



006-MAR-2006 14:05:59

University of Notre Dame
Grant Inception to Date Report
AS OF 06-MAR-2006

* * * Report Control Information (frrgitd release 5.3) * * *

Parameter Name	Value	Message
Parameter Seq No	351933	
Chart of Accounts		
As of Date	06-MAR-2006	
Grant Option	A	All Grants
Fund Info Y or [N]	N	Will not Include Fund Information
Line Count		Chosen number of lines per page