Grants Management Workshop Agenda: Answer These Questions

Question	Recommendation
What outcome can you expect upon completing today's workshop?	We will use an essential set of BW reporting functions to explore several reports to answer a broad range of questions related to grant data
What are the essential BW functions?	Filtering, organizing data based on column position, adding a subtotal or grand total, saving a modified report and undo
What if you can't figure out how to answer a question after you leave the workshop?	Use online Help

Use Case #1: What is the state of the budget, commitments (encumbrances) and actuals for the grants for which you are responsible?
1. Consider the results at the summary and Sponsored Class levels
2. Determine the current balance for each award
3. Examine activity by month

Question	Recommendation
How to view the overall health of the grants I am authorized to view?	Run *Budget vs Actual* report
How do I view award summaries for a single PI?	Use variable on Variable Entry screen
What is the activity total across all Sponsored Programs (I/O's) for each award?	Add subtotal by award
How do I view only active awards?	Filter **Award Status** Status definitions: https://www.bu.edu/research/funding-grants/grant-management-tools-resources/faq/ (search for "Grant Statuses")
What is the current balance for each award?	The amount is shown in the **Balance** column
Examine expenditures by categories of allowable expenses (Sponsored Class)	Add **Sponsored Class** from Free Characteristics
What is the total spent for all awards?	Add grand total
How can I reorganize data in my report by Sponsored Class or by Sponsor, for example?	Change column order
How can I undo something I just did (either intentionally or not)?	Back/Back one navigation step

Use Case #2: Save a modified report (aka a "View") so it can be used again in the future	
Question	Recommendation
How do I save a report once I have modified it the way I want it?	Create a Saved View

Break / in-class assignment – Your turn!
For each PI in your department/center, determine the budget total for all active awards for which they are responsible

Use Case #2, coninued: Save a modified report (aka a "View") so it can be used again in the future	
Question	Recommendation
How do I run a customized report I have saved?	Run a Saved View
What if the data in my Saved View doesn't look right?	Check date; examine applied filters

Use Case #3: Focus on a single award. Show activity by month. Explore details underlying the summary results for this award	
Question	Recommendation
How do I focus on a single award?	Run *Grant Document for Expenditures* report for a single Grant or filter by a single award within a list of several
I need to see more than the total spent against that award. How do I see the expense details?	Use "Go To" to drill to a detailed report – or run it directly from the portal
Why is **Document Type** important?	**Document Type** = transaction type
I want to see my data broken out by month. How do I do that?	Add Free Characteristic **Period/Fiscal Year**
Show expenses for the month most recently completed	Filter by date or run report for specific month
How is F&A calculated and applied to an account?	F&A costs are not readily identifiable with individual projects. F&A is designed to partially reimburse the University for the costs of using its facilities and administrative structure in carrying out research. Since it would be extremely difficult to identify the appropriate rate associated with each research project the rate is established through negotiation with the US Department of Health and Human Services based on actual audited costs historically incurred by the university in the course of carrying out its research portfolio. Refer to https://www.bu.edu/research/funding-grants/managing-an-award/

Use Case #4: Explore commitments on a single award	
Question	Recommendation
How can I view outstanding commitments?	Drill down from a Commitment cell in *Budget vs Actual* report or Run *Grant Document for Commitments* report or *Grant Commitment Detail* in Faculty folder

Summary of concepts considered during this workshop	
Question	Recommendation
What are the three go-to BW tools important to remember?	Filtering, organizing data by column position and how to add a subtotal or grand total
What types of filtering are possible?	Inclusive/exclusive filters; long-form and short-form filters

If time allows, explore these concepts	
Question	Recommendation
Who is being paid from a grant?	Use *Grant Document for Expenditures* or *Employee Labor distribution by Grant*
Is there more detail available to me than is currently displayed in BW?	Use drill-to to run FB03 WebGUI transaction

In-class Exercises: for any one of your grants…

Determine the total paid to everyone being charged to a grant
 	
    1. For each individual
    2. To everyone (total spent)
 	
Organize your result to display data by employee

Determine how much was spent with each vendor listed in your expense report. Organize your result to display data by vendor
Examine any active grant with an outstanding Research Supplies Sponsored Class commitment amount. What are the details underlying this commitment?