
How to Record Grants that Require Stewardship in Advance

Ver. 1.3

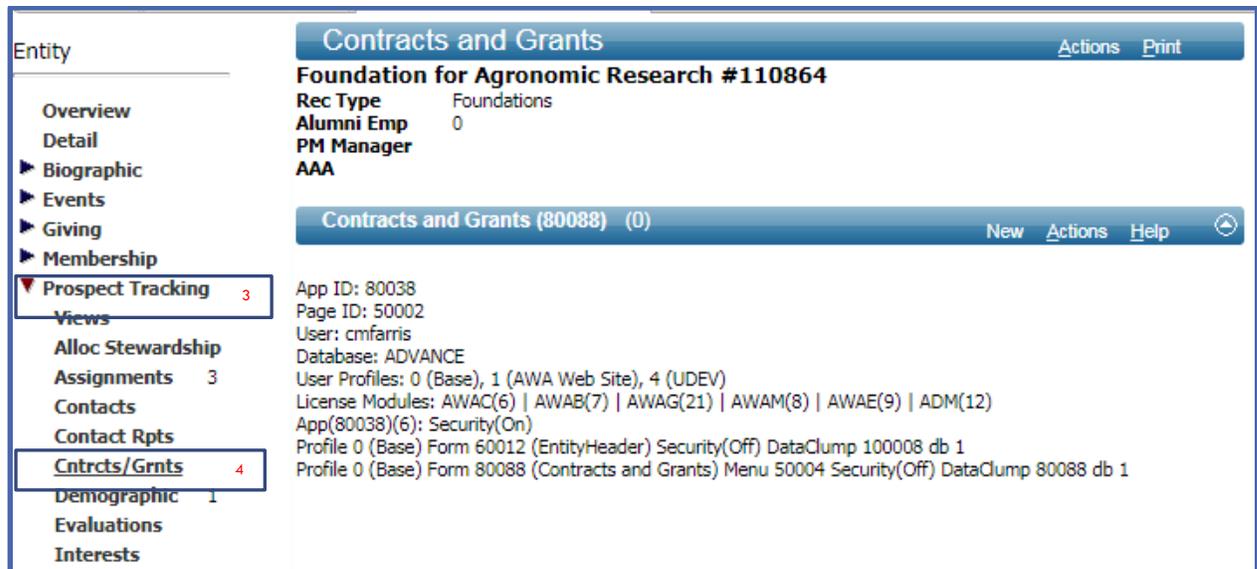
26 January 2018

Grant Information must be recorded at the entity level. This means that, when a grant submission is put into the system, it must be applied to the person or (typically) organization that is offering the grant. There are two methods to enter the grant information on the entity.

Part 1: Finding the Entity's Grant Screen

Method 1

1. Find the Entity using the [Lookup](#) tool in Advance. 
2. Open the Entity.
3. Select [Prospect Tracking](#) in the Nav Tree.
4. Select [Ctrcts/Grnts](#) from the Nav Tree.



The screenshot shows the 'Contracts and Grants' interface. On the left is a navigation tree with the following items: Overview, Detail, Biographic, Events, Giving, Membership, Prospect Tracking (3), Views, Alloc Stewardship, Assignments (3), Contacts, Contact Rpts, **Ctrcts/Grnts (4)**, Demographic (1), Evaluations, and Interests. The main content area has a header 'Contracts and Grants' with 'Actions' and 'Print' links. Below this is the entity name 'Foundation for Agronomic Research #110864' and its details: 'Rec Type Foundations', 'Alumni Emp 0', 'PM Manager AAA'. A sub-section header 'Contracts and Grants (80088) (0)' has 'New', 'Actions', and 'Help' links. The main content area lists system parameters: App ID: 80038, Page ID: 50002, User: cmfarris, Database: ADVANCE, User Profiles: 0 (Base), 1 (AWA Web Site), 4 (UDEV), License Modules: AWAC(6) | AWAB(7) | AWAG(21) | AWAM(8) | AWAE(9) | ADM(12), App(80038)(6): Security(On), Profile 0 (Base) Form 60012 (EntityHeader) Security(Off) DataClump 100008 db 1, Profile 0 (Base) Form 80088 (Contracts and Grants) Menu 50004 Security(Off) DataClump 80088 db 1.

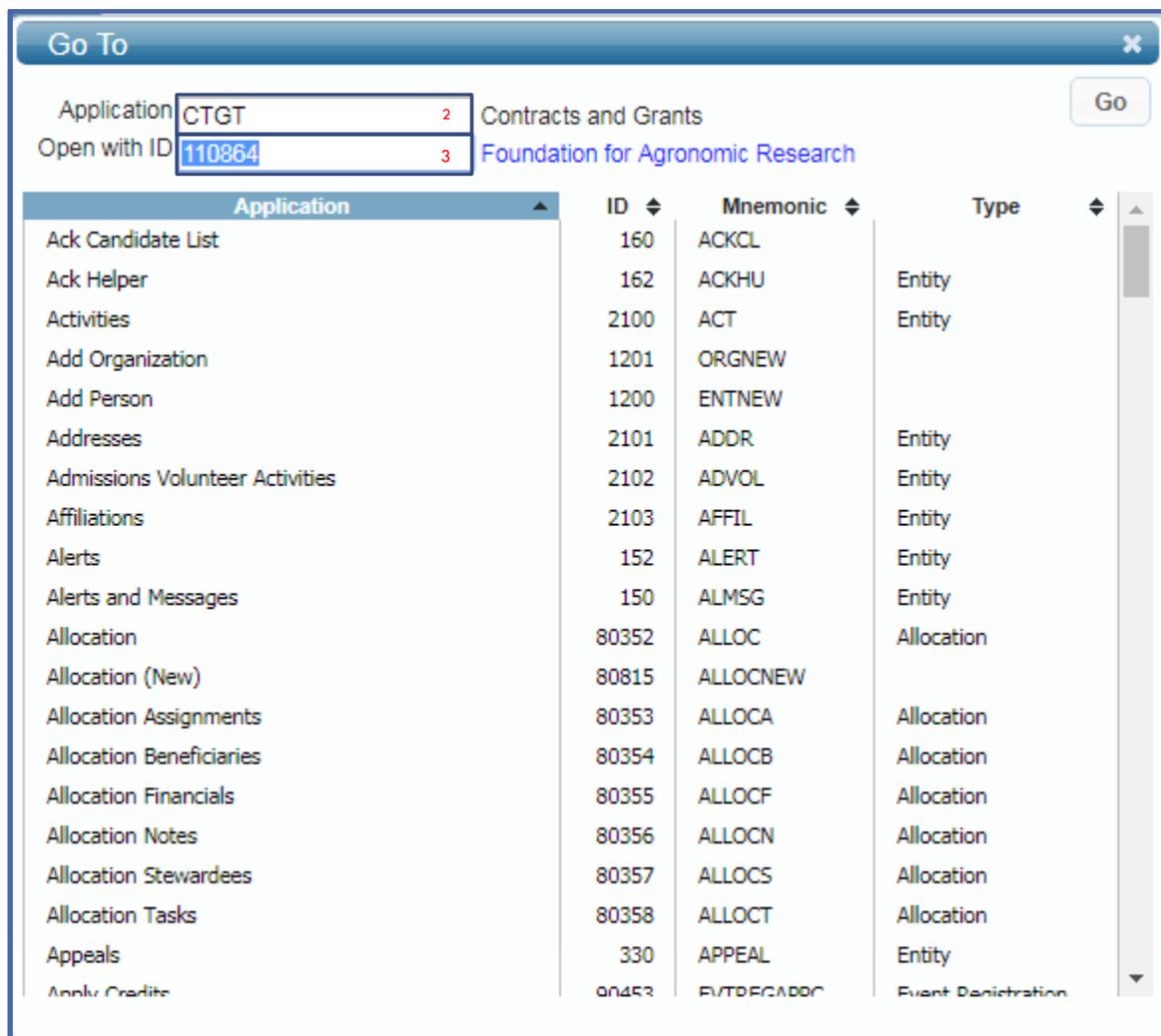
How to Record Grants that Require Stewardship in Advance

Ver. 1.3

26 January 2018

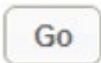
Method 2

1. Open the [Go To](#) tool in Advance. 
2. In [Application](#) enter [CTGT](#).
3. In [Open with ID](#) enter the Entity's Advance ID.



Application	ID	Mnemonic	Type
Ack Candidate List	160	ACKCL	
Ack Helper	162	ACKHU	Entity
Activities	2100	ACT	Entity
Add Organization	1201	ORGNEW	
Add Person	1200	ENTNEW	
Addresses	2101	ADDR	Entity
Admissions Volunteer Activities	2102	ADVOL	Entity
Affiliations	2103	AFFIL	Entity
Alerts	152	ALERT	Entity
Alerts and Messages	150	ALMSG	Entity
Allocation	80352	ALLOC	Allocation
Allocation (New)	80815	ALLOCNEW	
Allocation Assignments	80353	ALLOCA	Allocation
Allocation Beneficiaries	80354	ALLOCB	Allocation
Allocation Financials	80355	ALLOCF	Allocation
Allocation Notes	80356	ALLOCN	Allocation
Allocation Stewardees	80357	ALLOCS	Allocation
Allocation Tasks	80358	ALLOCT	Allocation
Appeals	330	APPEAL	Entity
Apply Credits	00453	EVTDGADDC	Event Registration

4. Hit Enter key or select [Go](#).



How to Record Grants that Require Stewardship in Advance

Ver. 1.3

26 January 2018

Part 2: Creating the Grant Record

1. Click [New](#) from the blue bar on the [Contracts and Grants](#) screen (or press [F6](#) on your keyboard.)

[New](#)

2. Fill out the new [Contracts and Grants](#) form.

- a. **Type***: Select [Other](#) or [RSSP](#) (Research Sponsored Programs). RSSP for grants that require a return from the University. Other for all others.
- b. **Stage***: Select:
 - i. [Submitted](#): When the grant request has just been submitted.
 - ii. [Funded](#): When the grant has been approved and funded.
 - iii. [Completed](#): When the grant period is over.
- c. **Grant Name***: Enter name of the grant.
- d. **Grant Description**: Enter grant period along with any other relevant information.
- e. **Submission Date***: Enter date when grant request was submitted.
- f. **Requested Amt***: Enter amount requested in grant submission.
- g. **Funded Amt**: Enter amount funded.
- h. **Contract Grant Num**: Enter unique grant contract number.
- i. **Proposal Number**: Enter associated Proposal number (if relevant.)

How to Record Grants that Require Stewardship in Advance

Ver. 1.3

26 January 2018

- j. **Allocation:** Enter Allocation ID. This is a number that represents the Foundation Project ID or Advance Allocation set aside for this grant. The number will look like this: 30008518. This may also be a Cost Center number associated with the University's Accounting System. Like this: 0382-90001 **See Gift Services for confirmation of Allocation.

IMPORTANT: EACH FUNDED GRANT TRACKED IN CONTRACTS + GRANTS SHOULD HAVE A UNIQUE ALLOCATION ID/PROJECT ID ESTABLISHED. DO NOT USE EXISTING ALLOCATION ID UNLESS THE EXISTING ALLOCATION ID WAS SET UP SPECIFICALLY FOR THIS GRANT. THIS IS SPECIFIC TO STEWARDSHIP GRANTS AND FOR THE ASSISTANT VC.

- k. **Grant Period:** Enter grant period in the form of **Start Date** and **Stop Date**. This represents the period that the grant is in effect. This does NOT start on the day the grant request is submitted or approved. These dates can be found on the grant award documentation.
3. Click **Save** or press F8 on your keyboard.

The screenshot shows a software window titled "Contracts and Grants (80089)" with a menu bar containing "Save", "New", "Actions", and "Help". The form contains the following fields:

Contract Grant ID	28		
Type*	RS	RSSP Research Sponsored Programs	
Stage*	SB	Submitted	
Grant Name*	Agronomic Intelligence in the New Age		
Grant Description*	This is for Agro and Nomic Excellence in Stuff. 8 Year Contract		
Submission Date*	01/04/2018	Contract Grant Num	234
Requested Amt*	100,000.00	Proposal Number	75
Funded Amt	90,000.00	Allocation	30015432
Grant Period	Start Date: 1/1/2019 Stop Date: 1/1/2027		

How to Record Grants that Require Stewardship in Advance

Ver. 1.3

26 January 2018

Part 3: Assign Grant Application Manager.

The Grant Application Manager is the Primary Investigator and/or Co-Primary Investigator(s) (University personnel) who made the initial grant request.

1. Choose Assignments from the Nav Tree.

The screenshot shows the 'Contracts And Grants - Assignments' form. On the left is a navigation tree with options: Contract/Grant, Detail, Assignments (selected), Contact Persons, Notes, Stages (1), and Tasks. The main form area has a header 'Contracts And Grants - Assignments' with 'Actions' and 'Print' links. Below the header, it displays 'Foundation for Agronomic Research #110864' and project details: 'Project: Agronomic Intelligence in the New Age' and 'Type: RSP Research Sponsored Programs'. A sub-header reads 'Contracts and Grants - Assignments (80541) (0)' with 'New', 'Actions', and 'Help' links. Below this is a table with columns: Assigned, Office, Type, Status, and Priority.

2. Select [New](#) or press F6 from your keyboard. [New](#)
3. Fill out the [Contracts and Grants – Assignments](#) form.

This screenshot shows the 'Contracts And Grants - Assignments' form with the 'New' button highlighted in blue. The sub-header now reads 'Contracts and Grants - Assignments (80541) (1/1)' with 'Save', 'Actions', and 'Help' links. The table below has one row with 'Assigned', 'Office', 'Type', 'Status' (containing a checked box and the text 'Active'), and 'Priority'. Below the table are form fields: 'Staff*' with a search box containing 'a' and a dropdown arrow; 'Type*' with a dropdown menu containing 'b'; 'Start*' with a text box containing 'c' and a calendar icon; 'Stop' with a text box containing 'c' and a calendar icon; and 'Comment' with a large text area containing 'd'. A checked box labeled 'Active' is also present.

How to Record Grants that Require Stewardship in Advance

Ver. 1.3

26 January 2018

- a. **Staff***: Use the Magnifying Glass to find the responsible party or type their Advance ID here.
-

NOTE: THIS IS THE PI BUT YOU MAY NEED TO ADD ADDITIONAL PEOPLE WHO FILE GRANT APPLICATIONS (I.E. CO-PI'S). THIS TOOL ALLOWS MULTIPLE ENTRIES.

- b. **Type***: Select Grant Application Manager. (The Grant Application Manager is the party who initially submitted the grant request to the grantor.)
- c. **Start*** and **Stop**: Select the Start and Stop dates of the responsible person's tenure. This form allows for multiple responsible parties.
- d. **Comment**: Optional block for any necessary notes.
4. Click **Save** or press **F8** on your keyboard. **Save**

Assigned	Office	Type	Status	Priority
Mrs. [redacted]		Grant Application Man...	<input checked="" type="checkbox"/> Active	

Staff* Mrs. [redacted] **Active**

Type* Grant Application Manager

Start*

Stop

Comment

How to Record Grants that Require Stewardship in Advance

Ver. 1.3

26 January 2018

Part 4: Create Contact Persons (If Applicable)

Contact Persons are either University of Arkansas assigned Program Managers (this is the Assistant VC) and the relevant Development Staff Member or Granting Institution Program Managers. In some circumstances *both* the U of A and the Donor will assign Program Managers to better manage the grant resources. Some grants do NOT have Granting Institution Program Managers.

1. Select [Contact Persons](#) from the Nav Tree.

Contact	Type	Status	Phone	Fax

2. Select [New](#) or press F6 from your keyboard. [New](#)

How to Record Grants that Require Stewardship in Advance

Ver. 1.3

26 January 2018

3. Fill out the [Contracts and Grants – Contact Persons](#) form.

Contact	Type	Status	Phone	Fax
		<input checked="" type="checkbox"/> Active		

Type* Active

Contact ID*

Name*

Sort Name

Phone

Comment

- Type*: Choose [Grantee Program Manager](#) or [Grantor Program Manager](#). Grantee (Assistant VC) represents the University. Grantor is the funding institution.
 - Contact ID*: Use the Magnifying Glass or manually enter the Advance ID of the Grantee/Grantor. You may also type individual names if they are not in Advance.
 - Name*: Enter Program Manager name(s).
 - Sort Name: Populate with Last Name, First Name, MI if you are NOT using the Advance ID in the Contact ID field.
 - Phone: Enter phone number.
 - Comment: Enter optional notes concerning Grantee/Grantor.
4. Click [Save](#) or press **F8** on your keyboard.

How to Record Grants that Require Stewardship in Advance

Ver. 1.3

26 January 2018

Contact	Type	Status	Phone	Fax
Mrs. [REDACTED]	Grantee Program ...	<input checked="" type="checkbox"/> Active		

Type* Grantee Program Manager **Active**

Contact ID* Mrs. [REDACTED]

Name*

Sort Name

Phone

Comment

How to Record Grants that Require Stewardship in Advance

Ver. 1.3

26 January 2018

Part 5: Assign Reminders to Grant Manager

Program Managers and/or other staff are often required to provide information back to the granting institution in the form of updates and results. This is called Stewardship. Grant documentation and University policy will define feedback intervals/dates. MULTIPLE TASK REMINDERS CAN BE SET.

1. Select **Tasks** from the Nav Tree.

The screenshot shows a web application interface. On the left is a sidebar with a 'Contract/Grant' section containing a list of options: Detail, Assignments (1), Contact Persons (1), Notes, Stages (1), and Tasks. The main area has a header 'Contracts And Grants - Tasks' with 'Actions' and 'Print' links. Below the header, it displays 'Foundation for Agronomic Research #110864' with 'Project: Agronomic Intelligence in the New Age' and 'Type: RSSP Research Sponsored Programs'. A sub-header reads 'Contracts and Grants - Tasks (80543) (0)' with 'New', 'Actions', and 'Help' links. Below this is a table with columns: Task, Status, Scheduled, Completed, and Responsible.

1. Select **New** or press F6 from your keyboard.
2. Fill out the **Contracts and Grants – Tasks** form.

The screenshot shows the 'Contracts and Grants - Tasks (80543) (1/1)' form. It has a header with 'Save', 'Actions', and 'Help' links. Below the header is a table with columns: Task, Status, Scheduled, Completed, and Responsible. The table is currently empty. Below the table are several input fields: 'Task*' with a dropdown menu containing 'a'; 'Status*' with a dropdown menu containing 'b' and a 'Scheduled' label; 'Completed' with a dropdown menu containing 'd' and a calendar icon; 'Description*' with a text area containing 'e'; and 'Responsible' with a search field containing 'f' and a dropdown menu.

- a. **Task***: Choose **Action Item**.
- b. **Status***: Choose **Pending** for first-time task creation. Update in the future to **Past Due**, **Completed** or **Canceled** as needed.

How to Record Grants that Require Stewardship in Advance

Ver. 1.3

26 January 2018

- c. **Scheduled:** Enter future date task NEEDS TO BE COMPLETED.
 - d. **Completed:** Enter date task completed.
 - e. **Description*:** Enter description of task. (i.e. Annual Update Report)
 - f. **Responsible*:** Enter the ID of the person who needs to complete this task. This is typically the Program Manager(s) that was/were defined in the **Contacts** page.
3. Select **Save** or press **F8** on your keyboard.

Contracts and Grants - Tasks (80543) (1/1) Save New Delete Actions Help

Task	Status	Scheduled	Completed	Responsible
Action Item	Pending	12/01/2019		Mrs. [REDACTED] #704525

Task* A Action Item
Status* P Pending **Scheduled** 12/01/2019
Completed
Description* Stewardship Report

Text Security (80826) Help

Inquiry Private Group Public
Maintenance Operator Source Group Public

Tasks Responsible (80338) (1/1) Save New Actions Help

Name
Mrs. [REDACTED]

ID* 704525 M [REDACTED] ew