Research Administration & Finance

Navigation and Explanation of Commonly Used Forms:

FRAPROP – Proposal Maintenance Form
FRABUDP – Proposal Budget Form
FRAGRNT – Grant Maintenance Form
FTMAGCY - Agency Code Maintenance Form
FGIRUGT – Grant Inception To Date Form
FTMFUND - Fund Code Maintenance Form

❖ **Note:** All Banner data/information displayed in this document reflects training/sample data.
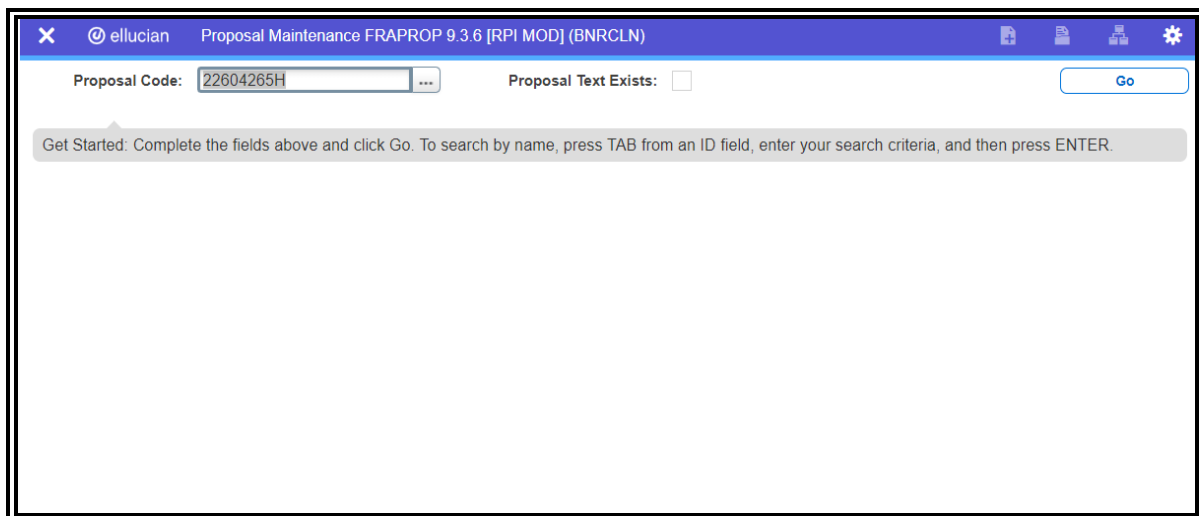
<u>FRAPROP</u>:   Proposal Maintenance Form

Use this form to enter or update proposal information related to proposals such as:
- personnel & chargeout information
- indirect cost and cost share amounts
- subject reviews

Notes:
- ✓ When using fund/organization security, access to this form is controlled by the Responsible Organization code entered on the proposal. Without this code, you will be denied access to this form.

Enter Proposal Code, Click Go

To create a proposal:
1. Enter the proposal code or 'Next' in the Proposal Code field and click 'Go'
   a. Click on the Search button (…) next to the proposal code field to search for an existing proposal code (FRIPROP)
2. Navigate to the Main tab (click on the Main) Enter the following required fields:
   a. Chart of Accounts (COA)
   b. Responsible Organization
   c. Long Title of the proposal
   d. Project Period - start date
   e. Agency Code
3. Enter additional proposal information by clicking on the horizontal tabs or clicking the

   Related menu [icon] in the top right corner of the screen. Additional functions such as copying a proposal or navigating to other forms such as FRABUDP and FRIPRST are also available under the Options menu.

4. Save the record

To Copy a Proposal:
1. Enter a unique proposal code or 'Next' in the Proposal Code field and click 'Go'
2. Navigate to the Main tab (click on the Main)

3. Click on the Related menu [icon], in the top right corner of the screen, choose 'Copy Proposal Information'

FRABUDP: Proposal Budget Form

Use this form to create proposal budgets. There are three ways to create a proposal budget:

- By manually entering budget information on this form
- By copying information from an existing budget
- By consolidating multiple budgets into a single budget

Note:

✓ When copying information from existing proposal budgets, you can change the information as needed prior to saving the new proposal budget.
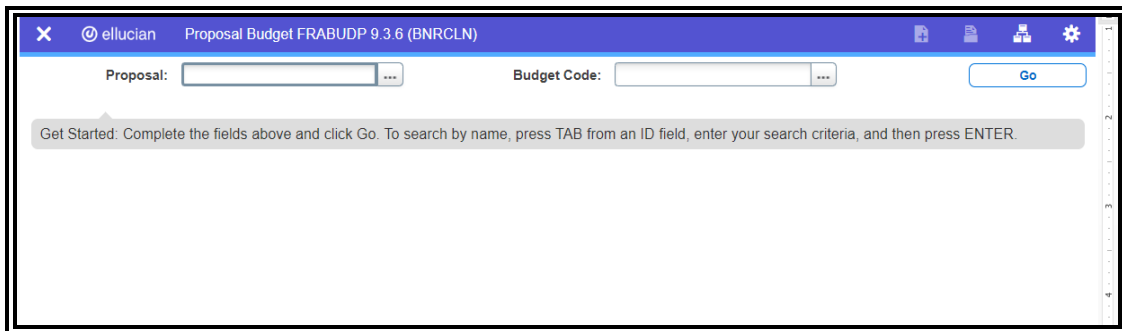
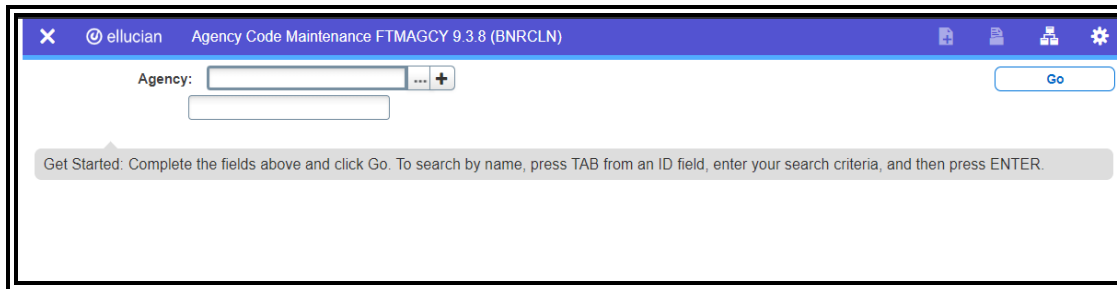Enter Proposal Code, Click Go
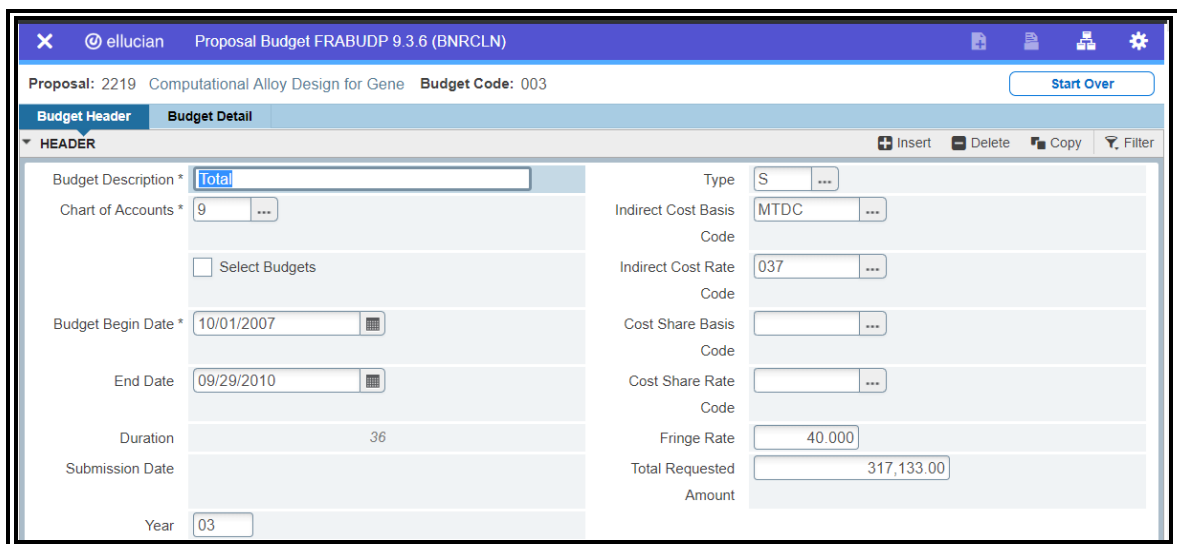
<u>To create a budget proposal:</u>

1. Enter the proposal code in the proposal code field.
   a. Click on the Search button next to the proposal code field to search for an existing proposal code (FRIPROP)
2. Enter the budget code in the budget code field. Click on 'Go'
3. To use an existing budget to create budget detail lines in the new budget
   a. Click on the Select Budgets checkbox. A form, FRCBSEL, will display for the user to query to find the budget(s) to be copied
   b. Select the Select check box for the budgets to be copied. If more than one budget is selected, Banner will consolidate the budget information into the new budget.
   c. Click Create Budget Detail under the Options menu. Banner will create a budget detail line in the new budget and return to FRABUDP.
   d. Make any necessary changes
   e. Save the record
4. Enter any of the following optional information:
   a. Year
   b. Type of Budget
   c. Fringe Rate

5. To create a new budget, click on the Related menu , in the top right corner of the screen, choose Proposal Budget Detail Window to enter budget detail information
6. Save the record

FRAGRNT: Grant Maintenance Form

Use this form to enter or update grant information, as well as maintain:

- Personnel & chargeout information
- Indirect cost and Cost Share amounts
- Subject reviews

Note:
✓ When using fund/organization security, access to this form is controlled by the Responsible Organization code entered on the grant. Without this code, you will be denied access to this form.

To Create a Grant With or Without Existing Proposal Information

1. Enter the grant code or 'Next' in the proposal code field.
   a. Click on the Search button next to the proposal code field to search for an existing proposal code (FRIGRNT)
2. Enter the proposal code associated with the grant. – optional
3. Click 'Go'
4. If a proposal code was entered in the key block, information for that proposal will display for the grant.
5. Enter the following required fields:
   a. Chart of Accounts (COA)
   b. Responsible Organization
   c. Long Title of the proposal
   d. Project Period - start date
6. Click on the tabs across the form to enter additional information relating to:
   a. Grant Agency
   b. Location
   c. Cost Code
   d. Personnel
   e. Billing
   f. User Defined Data
   g. Chargeout Amount
   h. Estimated Count of Employees
   i. Inquiry Subject Review
   j. Update Subject Review
   k. Related Proposals
   l. RPI Cost Sharing
   m. Income Detail
   n. Report Tracking
7. Save the record

To Copy a Information From an Existing Grant to a New Grant:

1. Enter a unique grant code or 'Next' in the Grant Code field.
2. Navigate to the next block (cntl +page down or Block -> Next or Next Block button)
3. Click on the Related menu , in the top right corner of the screen, choose 'Copy Grant Information'
4. Enter the grant code from which you want to copy information in the Copy From Grant code field.
5. Click OK
6. Save the record

<u>FTMAGCY</u>:   Agency Maintenance Form

Use form to create and maintain a list of agencies external to your installation for reporting purposes.

<u>For new agency codes:</u>
1. Enter the external agency code in the Agency field or 'Next' to generate a sequential ID number.
2. Enter the Agency Name
3. Click on 'Go'
4. Enter Contact and Address information
5. Save the record

<u>For existing agency codes:</u>
1. Enter the external agency code. The Agency name will display
2. Click on 'Go'
3. Click on either the Agency Information or Address tab to display current agency information.

FGIRUGT: Grant Inception To Date Form

Use form to display **grant** totals by account type, current period transactions and encumbrance details for the specified **grant**. Access to this form is inquiry only.

1. <u>Key Block:</u> Chart of Accounts (9) and Fiscal Year will default. Enter **Month** 3 letter abbreviation code, **Grant** code number and press 'Enter' to get the Grant Title.
   - A list of funds associated with the Grant code will be displayed in the **Funds** field. You will only view information for those funds to which you have access to.
   - If a '**Funds Incomplete**' flag appears, review the list of funds to determine which funds are excluded/included.
   - Click 'Go' to populate information in the Detail Block.
2. <u>Detail Block:</u> Displays summary information by account type. Totals are displayed for Adjusted Budget, (Inception) to data activity, (current) period activity, budget reservation (encumbrance), and balance available. There is also a grand total.
   - Use *up/down arrows* to move to the desired account type and
     tab to access encumbrance value then
     - Press *List Field Values* or F9 for detail information
   - Press *Start Over* to re-enter Key Block information
   - Press *Exit* to return to Menu(F()

FGIRUGT – continued.

3. Current Period Transactions: If you clicked next to an amount in the Current Period Activity column and pressed *List of Values(F9)*, the following information will be displayed:

- If the transaction is a labor transaction, and if you are authorized to view labor detail for specific fund, press *List of Values* to access labor detail (if available).

FGIRUGT – continued.

4. Encumbrances and Budget Reservations: If you clicked next to an encumbrance amount in the Budget Reservation column on the main screen and pressed *List of Values*, the following information will be displayed:
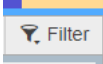
<u>FTMFUND</u>: Fund Code Maintenance Form

Use form to display fund code information.

<u>To query on a specific fund code:</u>

1. Since this form opens in input mode, the user needs to put the form in query mode by clicking on the Filter icon ![Filter] in the top right corner of the window, or F7
2. Enter the fund code in the Fund: field
3. Click on 'Go', or F8
4. By default, this form appears in 'Multiple Records' view. To switch to 'Single Record' view, click on the singe record button at the top of the screen. ![button]
5. Additional fund information can be obtained by clicking on the Related menu ![icon], in the top right corner of the screen.