
End-User Training Guide

Course Code: FIN 211

Course Title: Create and Maintain Grants

Course Overview

Course Description

This course provides a comprehensive review of the Create and Maintain Grants processes.

This course consists of the following modules:

- Module 1: Course Introduction
- Module 2: Create and Maintain Grants
- Module 3: Course Summary

Training Audiences

The following audience(s), by INFORMS Security role(s) are required to complete this course prior to being granted related system access:

- Department Contract Administrator
- Department Contract Manager
- Department Grant Administrator
- Department Grant Manager

Prerequisites

Participants are required to complete the following End-User Training courses prior to starting this course:

- ERP 101 – Overview of INFORMS
- ERP 102 – INFORMS Navigation, Reporting, and Online Help
- FIN 101 – Financials Fundamentals
- FIN 301 – Managing the General Ledger
- FIN 209A – Create, Maintain, Budget Operating and Grant Projects
- FIN 210 – Create and Amend Contracts

Delivery Method

This course is intended to be delivered through Instructor-led Training.

Estimated Duration

The total duration of this course, when delivered through Instructor-led Training, is 3 hours.

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Module 1: Course Introduction

Topics

This module covers the following topics:

- Course Administration and Logistics
- Learning Objectives
- Roles and Responsibilities
- Navigation
- Key Changes to the Business Process
- The End-to-End Business Process
- Introduction to Demonstrations and Exercises

Module 1: Course Introduction

Course Administration and Logistics

To get the most benefit from this course, participants should:

- Actively participate in class, and ask questions as needed
- Please turn off cell phones, and refrain from the use of email and the Internet
- Take breaks as scheduled and return to the classroom promptly

Module 1: Course Introduction

Learning Objectives

At the conclusion of this course, participants will be able to:

- Create and Maintain Grants.

Module 1: Course Introduction

Training Audience:

The following roles are associated with this course and will play a part in conducting the related business processes for the County:

Roles and Responsibilities

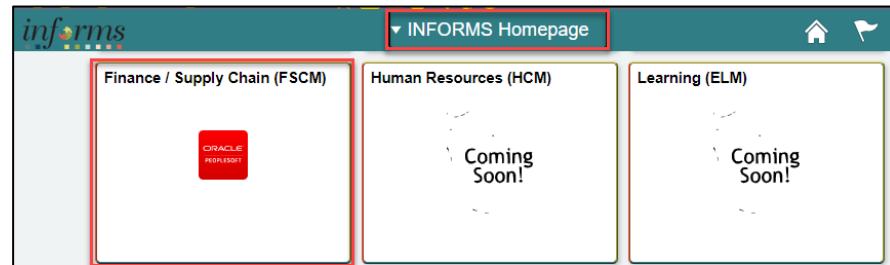
- **Department Grant Administrator:** The Department Grant Administrator is responsible for entering/submitting grant proposals, generating awards, and generating Reports.
- **Department Grant Manager:** The Department Grant Manager will have the ability to view and approve proposals and generate reports.
- **Department Contract Administrator:** The Department Contract Administrator is responsible for creating customer contracts for internal, external, and grant billing.
- **Department Contract Manager:** The Department Contract Manager is responsible for reviewing and activating customer contracts for the department.

Module 1: Course Introduction

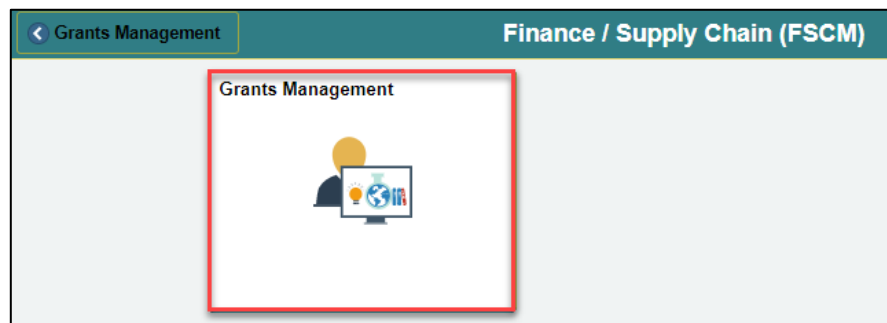
Navigation

Below are the steps to navigate to the General Ledger, which will be used for navigation in the rest of this course:

1. From the INFORMS homepage, select the **Finance/Supply Chain (FSCM)** tile.



2. Select **Grants Management** tile.



Module 1: Course Introduction

Key Changes to the Business Process

The key changes to the Create and Maintain Grants business process include:

- Chart of Accounts
 - For grant contracts, first create a grant ChartField
- Grants will be tracked via the Grants ChartField in the General Ledger and departments will be creating Grants in **Grant Management Module**
- Grants will require a Project and a Customer Contract
- Customer Contracts will be used to automate the billing of projects expenditures to customers
- Costs will be tracked in the **Project Costing** module
- Projects transactions will now be tracked in **Project Costing** instead of the **General Ledger**
- Reports will be generated out of **Project Costing, Customer Contracts, Grants, Billing** and **General Ledger**

Module 1: Course Introduction

The End-to-End Business Process

INFORMS Grants was developed with all the integrated tasks associated with grants in mind and supports the key business processes associated with the administration of grant activities.

The benefits of the Grant process are:

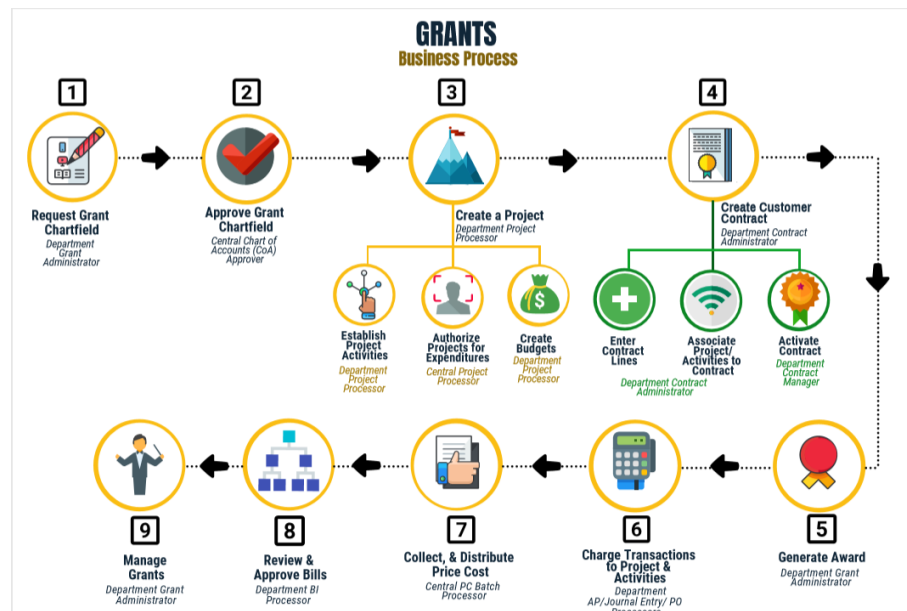
1. Review Grants Award history online
2. Track Expenditure Limits against Grants Budget for reimbursement checking
3. Track and manage Award Close-out activities

Pre-requisites to a Grant:

- For Grants, a Grant ChartField must be requested, approved, and created in INFORMS
- A project must be open and activated
- A customer contract must be created
- A Grant Sponsor must exist in INFORMS

As the process flow below shows:

- The Department Grant Administrator will request the Grant ChartField.
- Once the Department Project Processor has created the **Grant Project** and the Department Contract Administrator has created the **Contract**, the Department Grant Administrator will generate the Award.
- The Department Grant Administrator is responsible for maintaining and overseeing the Grant.



Module 1: Course Introduction

Introduction to Demonstrations, Activities, and Exercises

Users will take part in three types of hands-on learning throughout this course: Instructor Demonstrations, Training Activities, and Training Exercises. The definitions and descriptions of each are below.

Instructor Demonstrations



Instructor demonstration activities involve a walk-through of tasks and processes in INFORMS. Instructors will demonstrate how to perform these activities while users follow along.

Training Activities



Users will perform tasks and processes in the INFORMS training environment by using the Training Activity and Data Sheet provided, and by using this training guide as a reference.

Training Exercises



The Instructor will ask questions related to the lecture content and training activities, which are used to check users' knowledge and understanding of course content.

Module 1: Course Introduction

Course Introduction Summary

The following key concepts were covered in this module:

- Pre-requisites
- Benefits
- Process flow

Module 2: Create and Maintain Grants

Lessons

The Grants module provides functionality to support the key business processes associated with the administration and management of a grant.

Before Creating an Award Profile, a Grant ChartField must be created. Other requirements prior to Creating an Award Profile are: Create a Project and Creating a Customer Contract.

Post-Award activities are largely accomplished through the Project Costing, Contracts and Billing modules. Since Grant Award budgets and expenditures are stored and tracked by Grant ChartField, Project ID and Activity ID, the Project Costing module plays a major role in Grants reporting. The Contracts and Billing modules facilitate billing and revenue accounting entries.

This module includes the following lessons and lectures:

- Create and Maintain Grants
 - Pre-Requisites to Establishing the Award Profile
 - Establishing an Award Profile
 - Award Profile
- Reporting and Inquiry
 - Running and Viewing Reports

Lesson 1: Create and Maintain Grant Award

Lesson 1: Overview

At the conclusion of this lesson, users will be able to:

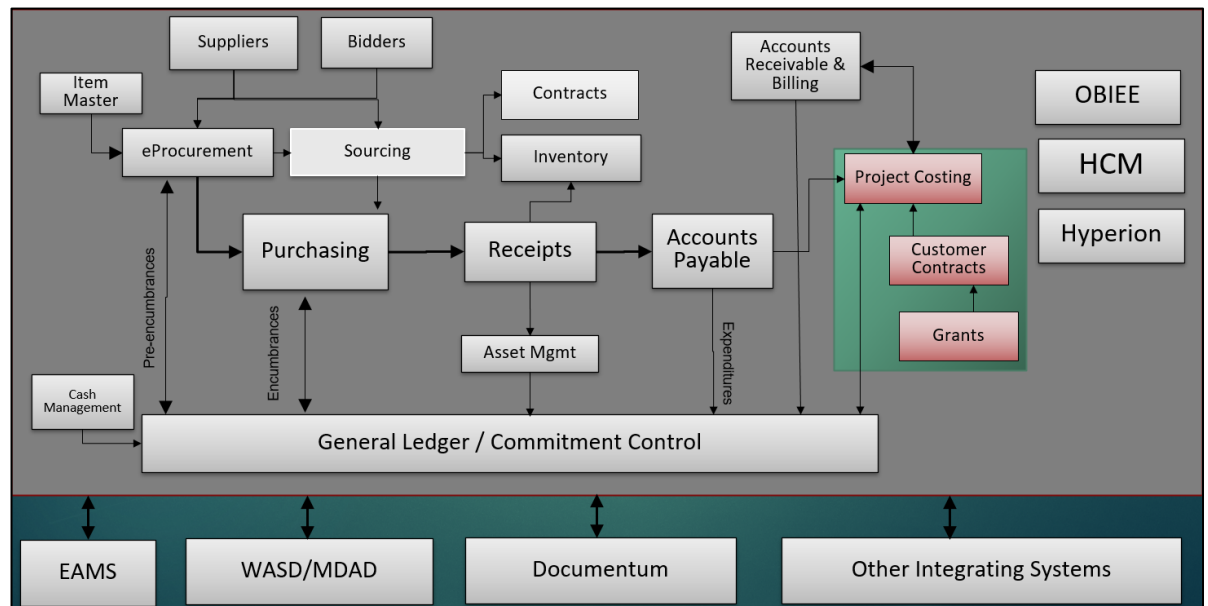
- Create and Maintain Grants
- Establish an Award
- Update an Award Profile, this includes:
 - Entering Match Information
 - Selecting a CFDA or CSFA number
 - Adding a Subrecipient
 - Viewing the Funding Inquiry page
 - Adding an Attachment
 - Entering Department Credit Information

Lesson 1: Create and Maintain Grant Award

Lesson 1: Introduction

INFORMS Grants is not a standalone application, as it leverages functionality delivered within INFORMS Contracts, Project Costing, General Ledger and Billing to provide a fully integrated Grants Management solution.

Grants administrative functions include award processing, award management and reporting, and award closeout. INFORMS Grants delivers tools that support all these administrative requirements.



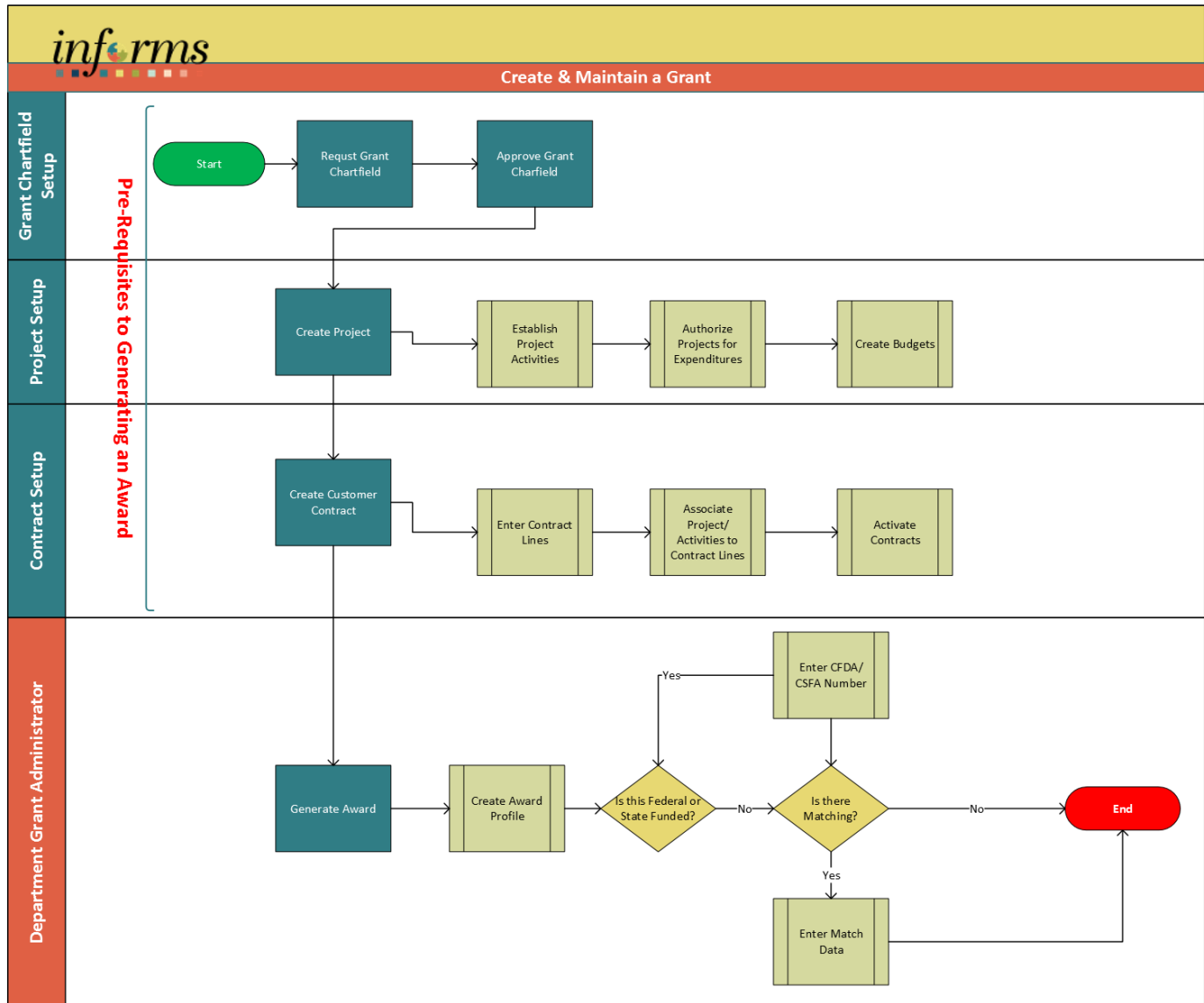
Lesson 1: Create and Maintain Grant Award

Lesson 1: Introduction

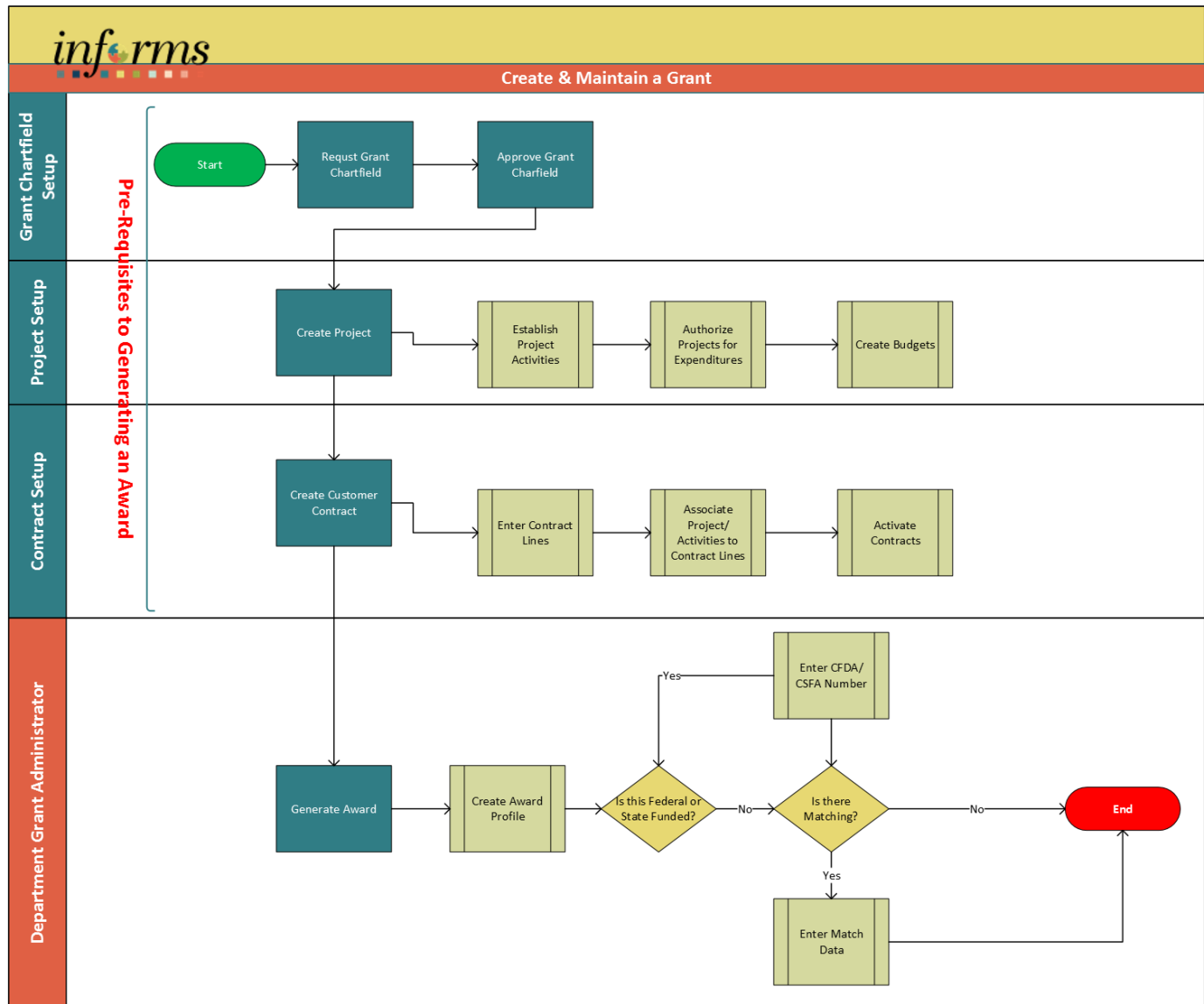
Once a Grant ChartField, a Project and a Contract have been setup in INFORMS, users can Establish the Award. The Award profile contains the demographic information that is associated with the Grant. This includes Matching, CFDA/CSFA number and any other information that is used to define the Award.

Lesson 1: Create and Maintain Grant Award

Lesson 1: Introduction



Lesson 1: Create and Maintain Grant Award



Lesson 1: Create and Maintain Grant Award

Key Terms



The following key terms are used in this Lesson:

Term	Definition
Award	Award represents the final agreement between the sponsor and the state agency for receipt and expenditure of funds.
Contract Document	A textual document created in INFORMS Supplier Contract Management that users can associate with a procurement contract, solicitation or a purchase order. Contract documents are signed agreements that bind buyers and suppliers to specific terms and conditions.
Project	Projects can be operating or capital. There are additional Project fields to further delineate information such as Activity and Source.
Recipient	The primary department receiving an award.
Subrecipients	Subrecipients are entities or individuals that receive Grants funding from the primary Grantee within the parameters of a Grants
Sponsor	The Sponsor represents the Grants funding source. The customer who will be invoiced for expense reimbursements associated with the award.
Grant ChartField	General Ledger Chart of Account segment that will store the Grant ID for budgeting and accounting transactions. ChartField attributes will be used to store reporting attributes related to Grant ID.
Award ID	The unique identifier assigned to each grant.
Award Profiles	Grant Management award that will store grant demographic information such as grant types, sponsor agency, CFDA/CSFA, etc. Award profile IDs match grant ChartField values. Award amount will equal sponsored amount.
Grant Business Unit	Each area has one and only one Grants Management Business Unit. The Business Unit is a 2-character code representing the Area.

Lesson 1: Create and Maintain Grant Award

Lecture 1:

Pre-Requisites to Establishing an Award Profile

The information created and maintained in the award profile establishes an award, defined as an executed agreement between an institution and a sponsor.

An award is associated with one business unit, one billing sponsor, and one award sponsor; each award must have at least one project/grant and at least one activity.

The bulk of this award setup information defaults in when the Create Award Profile process is run withing the Customer Contract, preventing unnecessary reentry of data.

Several elements are required prior to establishing an Award Profile. The below is a checklist of pre-requisites needed:

- ✓ Verify the Billing Sponsor has been created and is available for use
- ✓ Request a Grant ChartField
- ✓ Authorize a Grant ChartField
- ✓ Create a Project with associated Activities
- ✓ Authorize the Project for Expenditures
- ✓ Create a Customer Contract

Lesson 1: Create and Maintain Grant Award

Lecture 2: Create an Award Profile

Miami-Dade County uses the *Blue Bird* method for establishing awards. A *Blue Bird* award is granted without initiating a proposal. If an award is generated without a previously developed proposal, enter all the information related to the award in the Contract Header pages in INFORMS Customer Contracts.

After completing the required fields on the pages in INFORMS Customer Contracts, the system writes the information back to the INFORMS Grants system.

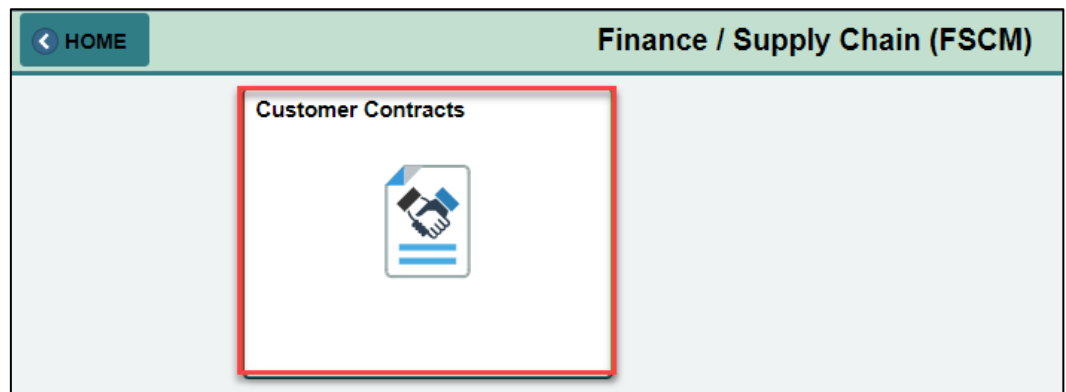
Note: Only Department Contract Administrator role can Establish an Award.

Establishing an Award Navigation

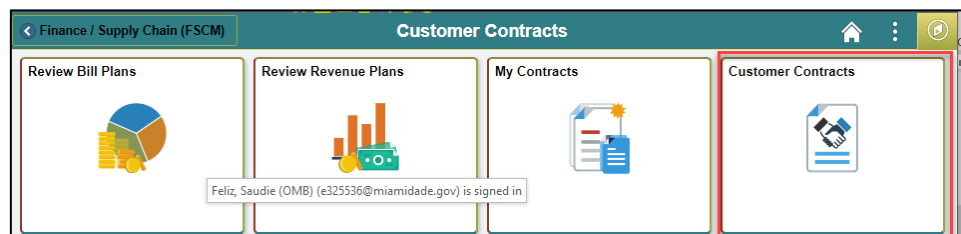
1. From the **INFORMS Homepage**, select the **Finance/Supply Chain (FSCM)** tile.



2. Select **Customer Contracts** tile.



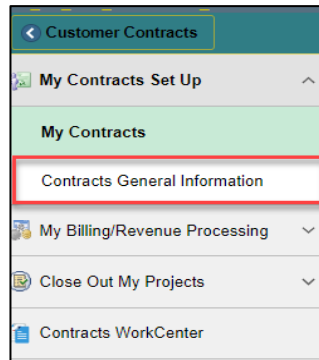
3. Select **Customer Contracts** tile.



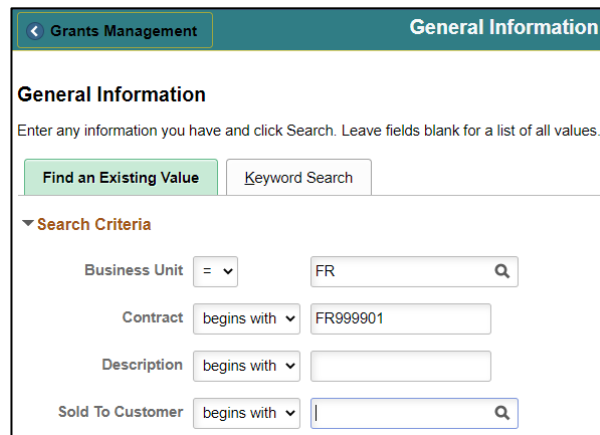
Lesson 1: Create and Maintain Grant Award

Lecture 2: Create an Award Profile

4. Select the **Contract General Information** link.



5. Enter the following information to **Find an Existing Value**:



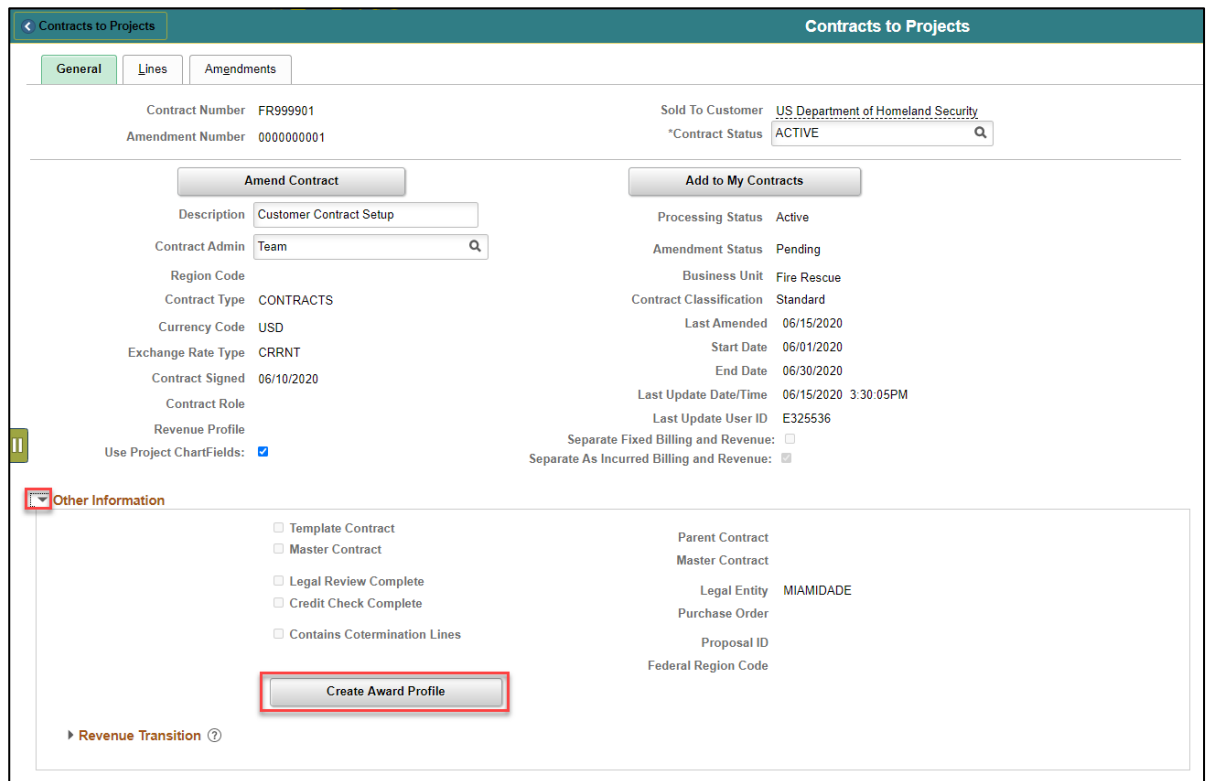
Field	Action	Comment
Business Unit	Select the Business unit from the list of pre-defined values	
Contract	Enter an 8-digit alphanumeric value starting with the two-digit Business Unit	Note: This is the same value as the 8 alpha numeric value requested for the Grant ChartField .
Sold to Customer	<i>Optional</i>	Select a Value from the list of pre-defined values

6. Select **Search**.

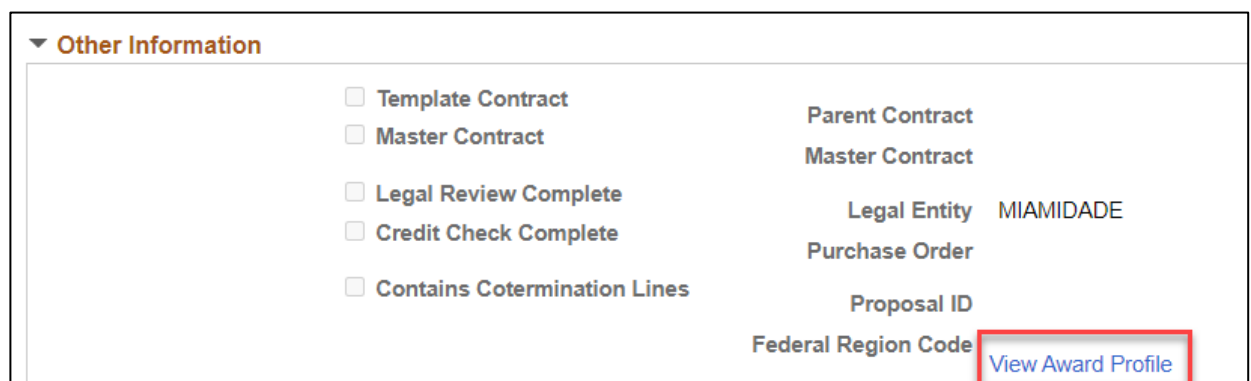
Lesson 1: Create and Maintain Grant Award

Lecture 2: Create an Award Profile

7. Select the **Grant ID**.
8. Expand the **Other Information** section by selecting on the arrow.
9. Select **Create Award Profile**.



Note: Once the Award Profile has been successfully created, this button will no longer be available, and instead **View Award Profile** link will be visible.



Lesson 1: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the User Productivity Kit (UPK).

Instructions Please refer to Activity 1 on the FIN211 Training Activity Guide and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

Users will perform the activity by following the SCM 201 Training Activity Guide and Data Sheet and by using the training materials as reference tools.

Instructors are available to answer any questions.

Lesson 1: Training Exercise 1

Debrief



1. What is a *Blue Bird* Award?

2. Which module is used to create an Award Profile?

3. What are the Pre-requisites to Establishing an Award?

4. Is a Grant ChartField and Award Profile the same thing?

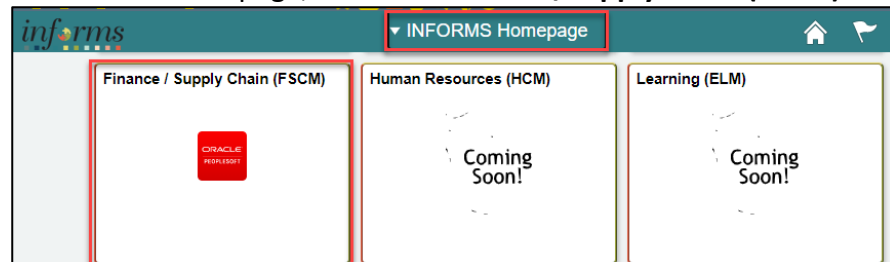
Lesson 1: Create and Maintain Grant Award

Lecture 3: The Award Profile

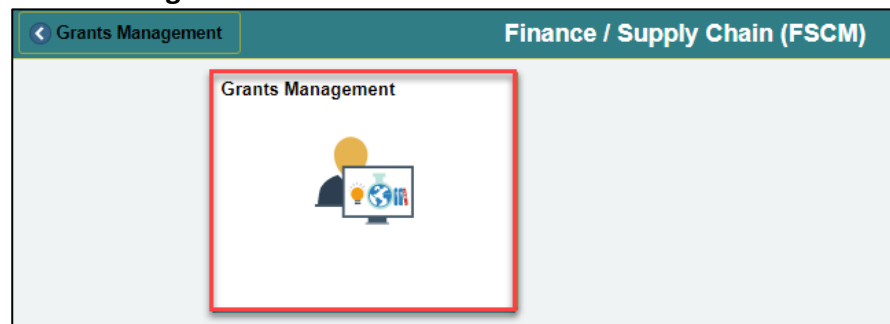
The Award Profile

Note: To perform this task users need to have the Department Grant Administrator role.

1. From the INFORMS homepage, select the **Finance/Supply Chain (FSCM)** tile.



2. Select **Grants Management** tile.



3. Select the **Grants** tile.



4. Under **Find Existing Value** page, input **Business Unit** and **Award ID** then press **Search**.

Note: The **Award ID** is the same number as the **Customer Contract ID**. This is the same value as the Grant ChartField and is a unique identifier for each grant.

Lesson 1: Create and Maintain Grant Award

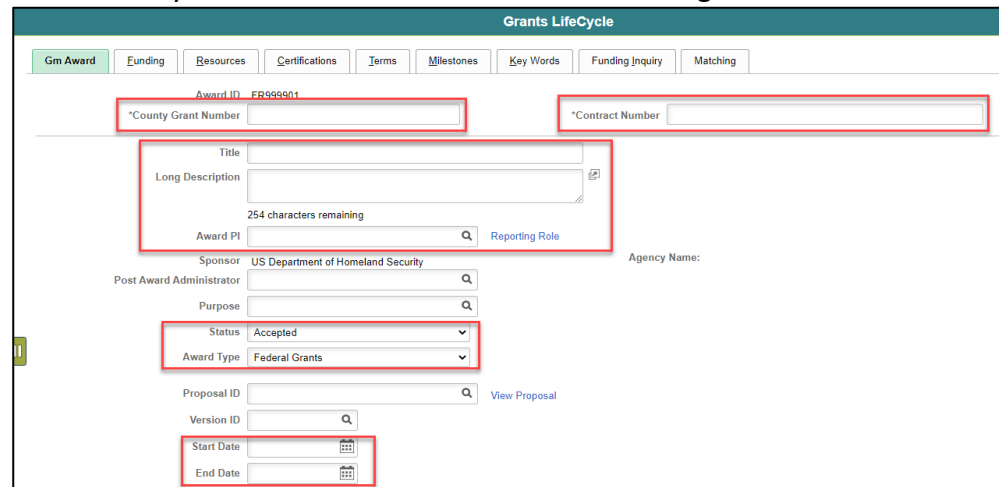
Lecture 3: The Award Profile

The Award Profile

The GM Award defines general information for the **Grants Award**.

5. Enter the following information:

NOTE: The County Grant Number should be the first six digits of the Award ID.

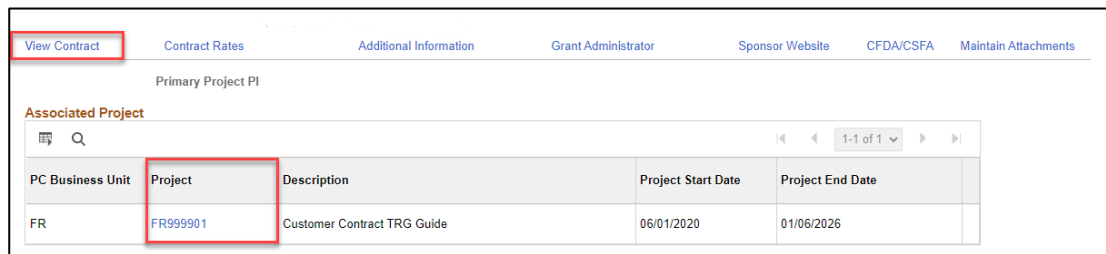


Field	Action	Comment
County Grant Number	Enter the County Grant Number	This is the county designated number for this Award *First six digits of the Award ID
Contract Number	Enter the Sponsor Contract/Grant number	This is the contract/award number assigned by the Sponsor Agency
Title	Enter a General Description	This field is a maximum of 56 Character
Long Description	<i>Optional</i>	Use this field for a more detail description of the grant.
Award PI	Select a value from the available list	This is the resource identified as the lead individual for the Grant
Sponsor	N/A	Defaults from the Customer Contract
Status	N/A	Will default to Accepted
Award Type	Describes the kind of Award.	This is based on the classification of the Award on the Award documentation.
Start Date	Populate the Grant Start Date	Start Date of the Award
End Date	Populate the Grant end date	End Date of the Award

Lesson 1: Create and Maintain Grant Award

Lecture 3: The Award Profile

The Award Profile



View Contract	Contract Rates	Additional Information	Grant Administrator	Sponsor Website	CFDA/CSFA	Maintain Attachments
Primary Project PI						
Associated Project						
1-1 of 1						
PC Business Unit	Project	Description	Project Start Date	Project End Date		
FR	FR999901	Customer Contract TRG Guide	06/01/2020	01/06/2026		

Use the **View Contract** link to drill to the **Grants Customer Contract**.

The **Associated Project** section of the page displays all Projects defined for the Award Profile. Use the **Project ID** link to drill down to the **Project**.

Note: The **Project ID** values are defined in the **Project Costing** module. There can be one or more **Project ID's** defined for the award.

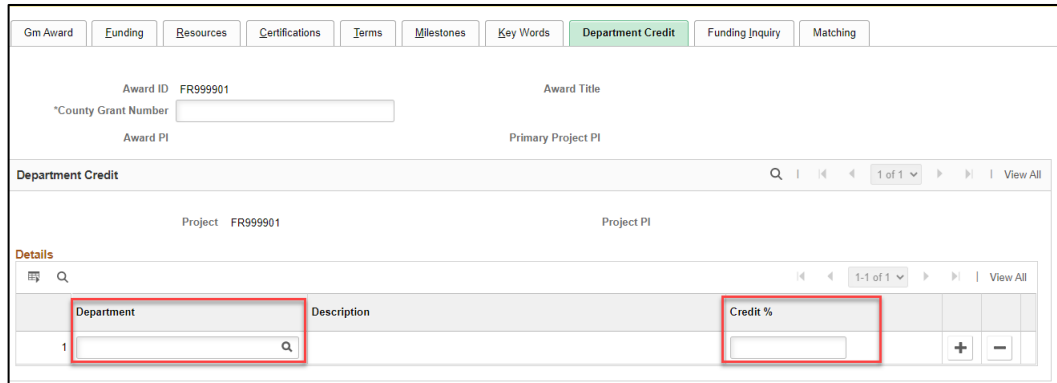
Lesson 1: Create and Maintain Grant Award

Lecture 3: The Award Profile

Award Profile – Department Credit

The **Department Credit** page contains information about the department(s) related to this award. The department credit page allows for the entering of one or more departments that have personnel and/or other departmental resources associated to this Award. The Credit % field allows an association of the percentage of contribution for each department. The sum of the Credit % fields must amount to a total contribution of 100%.

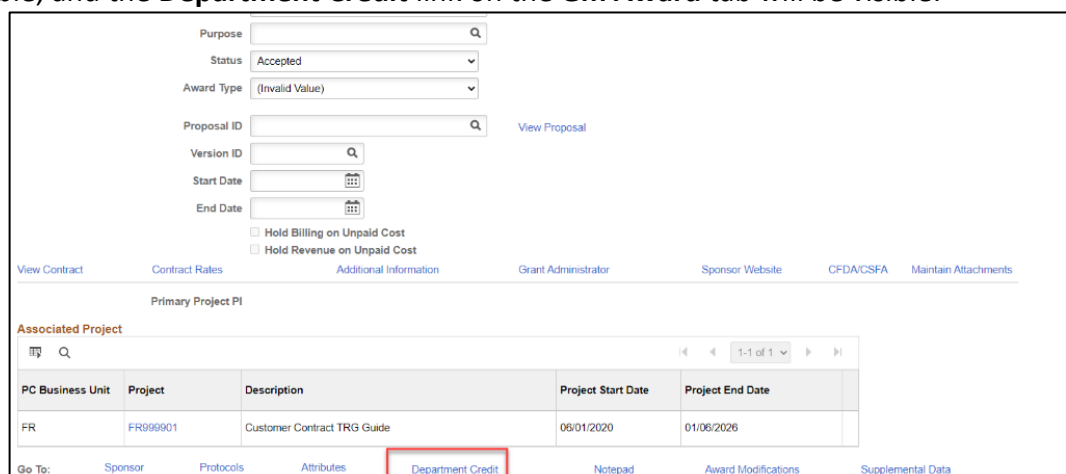
6. Select the **Department Credit** tab.
7. Enter the following information:



Field	Action	Comment
Department	Select a value from the list	This is the department(s) related to this Award
Credit	Enter a value	The Credit % value is a percentage that must equal 100
Add New Row	<i>Optional</i>	To add multiple departments, select the plus sign button

8. Select **Save**.

Note: Once the **Department Credit** information is successfully input, this tab will no longer be available, and the **Department Credit** link on the **Gm Award** tab will be visible.



Lesson 1: Create and Maintain Grant Award

Lecture 3: The Award Profile

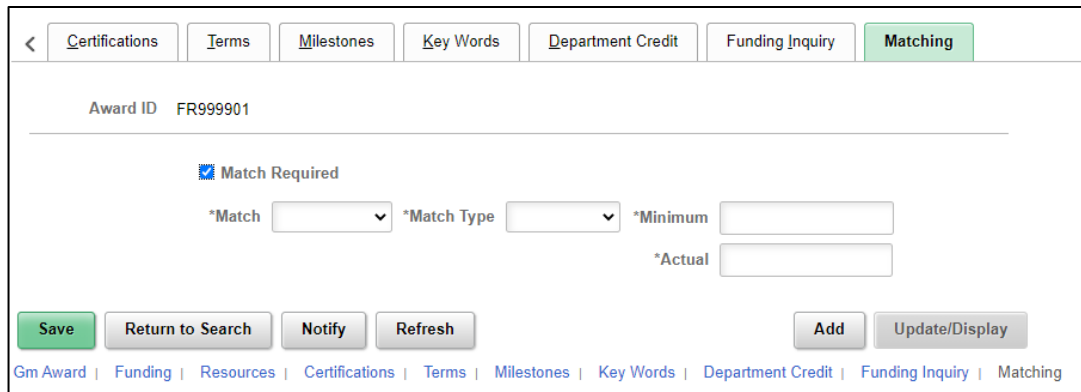
The Award Profile - Matching

The grant recipient's share of the project cost. Match must be directly related to the project goals and objectives. Miami Dade County has two kinds:

- **Cash:** Includes actual cash spent by grant recipients for project-related costs.
- **In-Kind:** In-kind match does not involve a monetary transaction. In-kind is the value of something received or provided, which is beneficial to the program, but for which no cash is exchanged.

9. If applicable, select on the **Matching** tab.

10. Enter the following information:



Field	Action	Comment
Match Required	Select this value	If Match is required, check this selection
Match	Select a value from the list	<u>Values Available</u> Cash In-Kind
Match Type	Enter the type of Match required	<u>Values Available</u> Amount Percentage
Minimum	Enter the minimum match amount allowed	
Actual	Enter the Actual amount received	

11. Select **Save**.

12. Select the **Gm Award** link to return to the **Award General** page.

Lesson 1: Create and Maintain Grant Award

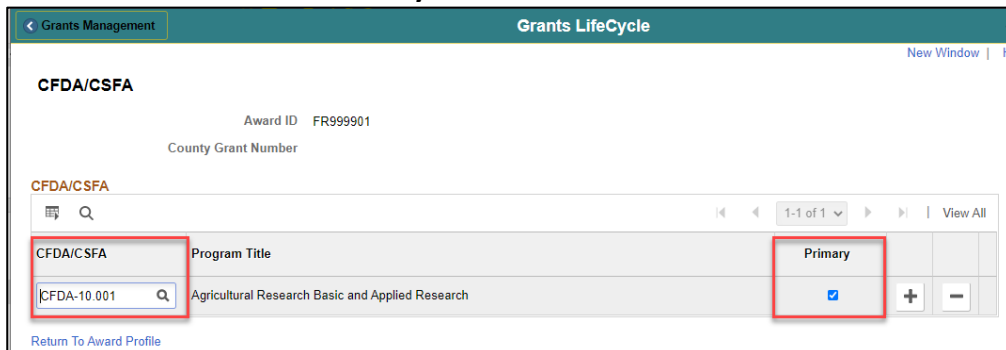
Lecture 3: The Award Profile

The Award Profile – CFDA/CSFA number

A **Catalog of Federal Domestic Assistance (CFDA)** number is a number assigned in the awarding document to most grants and cooperative agreements funded by the Federal government. Each program is assigned a unique number by agency and program that follows the program throughout the assistance lifecycle allowing for data and funding transparency.

The **Catalog of State Financial Assistance (CSFA)** is a single, authoritative, statewide, comprehensive source document of State financial assistance program information. The primary purpose of the Catalog is to assist users obtaining general information on state projects and identifying state projects that meet specific objectives. State projects are cataloged by agency and are assigned a **CSFA** number for easy referencing.

13. If applicable, select the **CFDA/CSFA** link.
14. Select from a pre-defined list of federally or state issued **CFDA/CSFA** numbers.
15. Select the checkbox in the **Primary** column.



Grants Management Grants LifeCycle

CFDA/CSFA

Award ID FR999901

County Grant Number

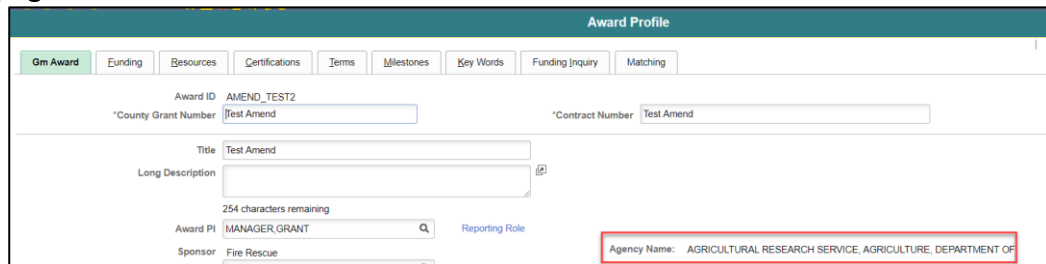
CFDA/CSFA

1-1 of 1 View All

CFDA/CSFA	Program Title	Primary
CFDA-10.001	Agricultural Research Basic and Applied Research	<input checked="" type="checkbox"/>

Return To Award Profile

16. Select the **Return to Award Profile** link.
17. Select **Save**.
18. Verify the **Agency Name** that is linked to the **CFDA** or **CSFA** appears on the **General** page.



Award Profile

Gm Award Funding Resources Certifications Terms Milestones Key Words Funding Inquiry Matching

Award ID AMEND_TEST2

*County Grant Number Test Amend

*Contract Number Test Amend

Title Test Amend

Long Description 254 characters remaining

Award PI MANAGER, GRANT

Sponsor Fire Rescue

Agency Name: AGRICULTURAL RESEARCH SERVICE, AGRICULTURE, DEPARTMENT OF

Lesson 1: Create and Maintain Grant Award

Lecture 3: The Award Profile

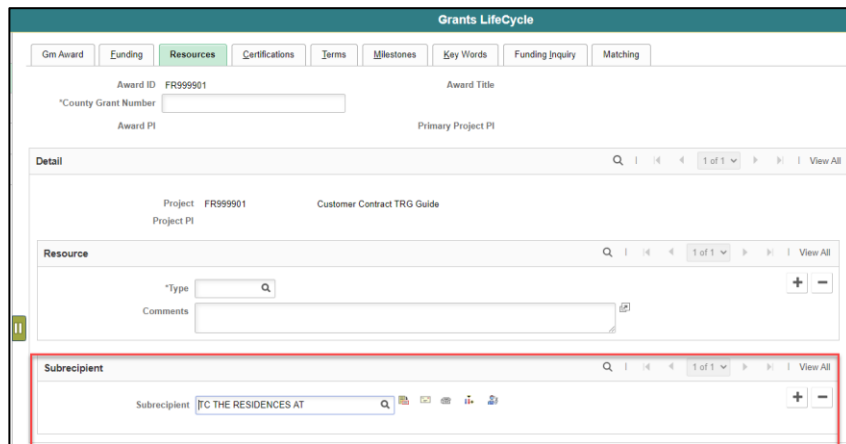
Award Profile – Resources (Subrecipients)

Subrecipients receive pass-through funds under a primary award. In INFORMS, they are treated similarly to suppliers.

Note: When establishing a subrecipient in INFORMS, data must be entered in two places:

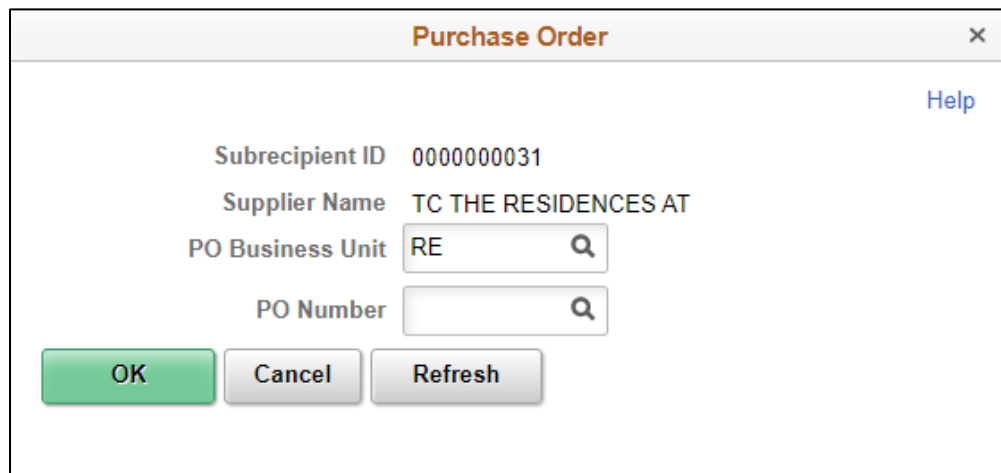
- First, define the initial subrecipient information using the **Supplier** pages.
- Second, complete the INFORMS Grants-specific data using the INFORMS Grants subrecipient pages.

19. Select the **Resource Tab** and a **Subrecipient** from the list of available values:



The screenshot shows the 'Grants LifeCycle' application interface. The 'Resources' tab is selected. The 'Subrecipient' section is highlighted with a red box, showing the subrecipient 'TC THE RESIDENCES AT'.

20. Optional: If there is a PO for this subrecipient, select the **PO ID** icon and enter the **PO Number**



The screenshot shows the 'Purchase Order' dialog box. It displays the following fields:

- Subrecipient ID: 0000000031
- Supplier Name: TC THE RESIDENCES AT
- PO Business Unit: RE
- PO Number: (empty)

The 'OK' button is highlighted in green.

21. Select **OK**.

22. Select **Save**.

Lesson 1: Create and Maintain Grant Award

Lecture 3: The Award Profile

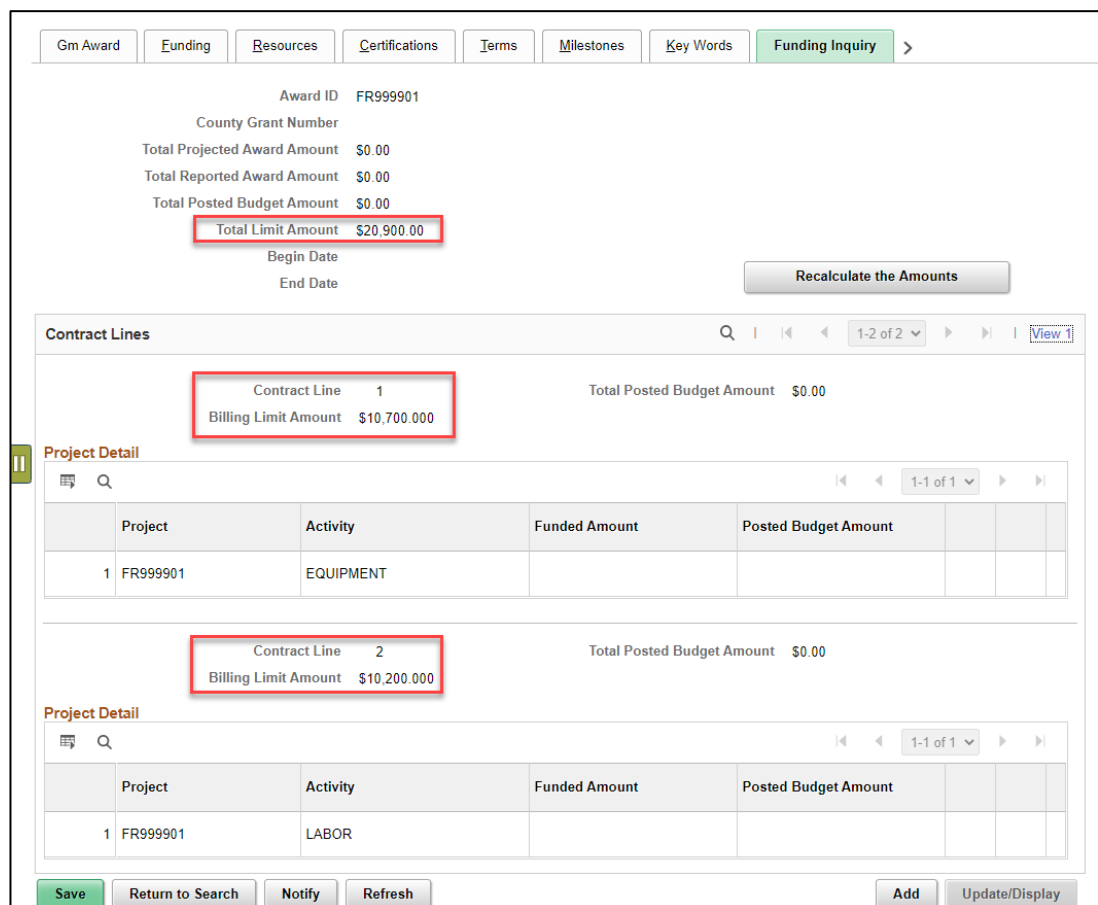
Award Profile – Funding Inquiry

The **Funding Inquiry** page will display the **Total Billing Limit** amount for the **Award**. This page will also display the **Billing Limit Amount** by contract line along with the associated project and activity of the contract line.

Note: This is an inquiry screen and is view only

23. Select the **Funding Inquiry** tab.

24. Review the **Total Limit Amount** and **Billing Limit Amounts** by line.



The screenshot displays the 'Funding Inquiry' tab in a software interface. At the top, a navigation bar includes tabs for 'Gm Award', 'Funding', 'Resources', 'Certifications', 'Terms', 'Milestones', 'Key Words', and 'Funding Inquiry' (which is active). Below the navigation bar, the 'Award ID' is FR999901. The 'County Grant Number' is blank. The 'Total Projected Award Amount' is \$0.00, the 'Total Reported Award Amount' is \$0.00, and the 'Total Posted Budget Amount' is \$0.00. The 'Total Limit Amount' is \$20,900.00, highlighted with a red box. The 'Begin Date' and 'End Date' are blank. A 'Recalculate the Amounts' button is located to the right of these fields. Below this, the 'Contract Lines' section is visible. It shows two contract lines. Contract Line 1 has a 'Billing Limit Amount' of \$10,700.00, highlighted with a red box. Contract Line 2 has a 'Billing Limit Amount' of \$10,200.00, also highlighted with a red box. Each contract line has a 'Project Detail' section below it, showing a table with columns for 'Project', 'Activity', 'Funded Amount', and 'Posted Budget Amount'. For Contract Line 1, the project is FR999901 and the activity is EQUIPMENT. For Contract Line 2, the project is FR999901 and the activity is LABOR. At the bottom of the screen, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Add', and 'Update/Display'.

Note: View all contract lines by selecting on the **View All** link or view one line at a time, by selecting the forward arrow button.

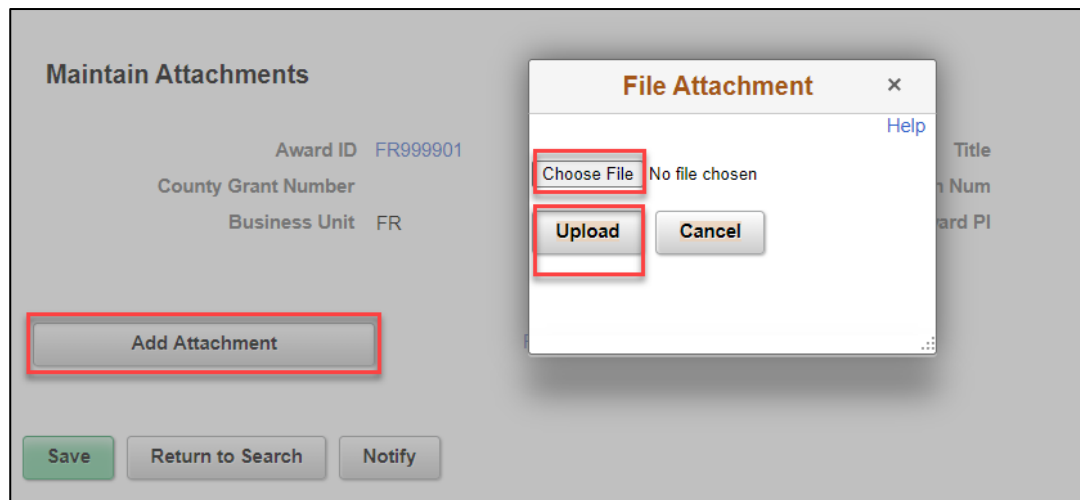
Lesson 1: Create and Maintain Grant Award

Lecture 3: The Award Profile

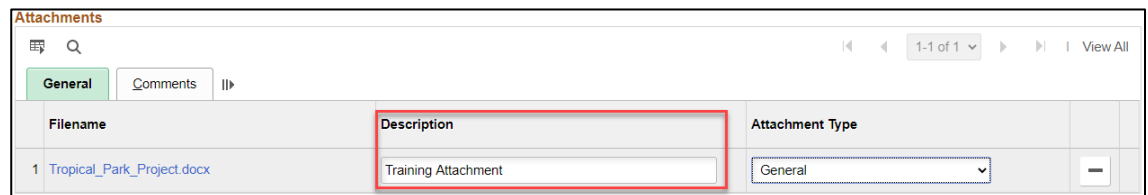
Award Profile – Attachments

The **Maintain Attachments** link allows the user to attach a document (Microsoft Word, Excel, etc.) to the Grants as supporting documentation. These could include work papers, design specifications, award documents, etc.

25. Select the **Gm Award** tab.
26. Select the **Maintain Attachments** link.
27. To add an attachment:



28. Select **Add Attachment**.
29. Select **Choose File** to select a file that will be uploaded into the system and attached to the Award.
30. Once the file is chosen, select **Upload** to load the document into the system.
31. Enter a description for the document.



32. Select **Save**.

Note: To remove the attachment use the **Subtract** icon on the **Attachment** row.

Lesson 1: Training Activity 2

Demonstration The Instructor will now demonstrate how to execute the business process through the User Productivity Kit (UPK).

Instructions Please refer to Activity 2 on the FIN211 Training Activity Guide and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

Uses will perform the activity by following the FIN211 Training Activity Guide and Data Sheet and by using the training materials as reference tools.

Instructors are available to answer any questions.

Lesson 1: Training Exercise 2

Debrief



1. Which page will Matching Information be entered?

2. Can the related Customer Contract be viewed from the Award?

3. What role is needed to update the Award Profile?

Lesson Summary



- Create and Maintain Grants
- Establish an Award
- Update an Award Profile, this includes:
 - Entering Match Information
 - Selecting a CFDA or CSFA number
 - Adding a Subrecipient
 - Viewing the Funding Inquiry page
 - Adding an Attachment
 - Entering Department Credit Information

Lesson 2: Reporting and Inquiry

Lesson 2: Overview

At the conclusion of this lesson, users will be able to:

- Run and View Reports

Lesson 2: Reporting and Inquiry

Lesson 2: Introduction

Reports are run in day-to-day activities that have been previously defined. In this lesson, an overview of INFORMS Reports & Queries available is covered.

Several types of reports have been developed. These include:

- Query Reports: User friendly, intuitive way to quickly generate ad-hoc and scheduled reports from any data stored in INFORMS tables.
- WorkCenter Reports: The Reports/Processes page provides access to system defined reports and processes for which a user has access.

Lesson 2: Reporting and Inquiry

Key Terms



The following key terms are used in this Lesson:

Term	Definition
Award	Award represents the final agreement between the sponsor and the state agency for receipt and expenditure of funds.
Contract Document	A textual document created in INFORMS Supplier Contract Management that users can associate with a procurement contract, solicitation or a purchase order. Contract documents are signed agreements that bind buyers and suppliers to specific terms and conditions.
Project	Projects can be operating or capital. There are additional Project fields to further delineate information such as Activity and Source.
Recipient	The primary department receiving an award.
Subrecipients	Subrecipients are entities or individuals that receive Grants funding from the primary Grantee within the parameters of a Grants
Sponsor	The Sponsor represents the Grants funding source. The customer who will be invoiced for expense reimbursements associated with the award.
Grant ChartField	General Ledger Chart of Account segment that will store the Grant ID for budgeting and accounting transactions. ChartField attributes will be used to store reporting attributes related to Grant ID.
Award Profiles	Grant Management award that will store grant demographic information such as grant types, sponsor agency, CFDA/CSFA, etc. Award profile IDs match grant ChartField values. Award amount will equal sponsored amount.
Grant Business Unit	Each area has one and only one Grants Management Business Unit. The Business Unit is a 2-character code representing the Area.

Lesson 2: Reporting and Inquiry

Lecture 1: Running and Viewing Reports

Reports will be available through the **WorkCenter**. **WorkCenter** pages (or **WorkCenters** for short) are a type of INFORMS page that enables users to view related transactions, analytics data, query results, and other INFORMS resources from one central location.

Inform's WorkCenter's offer three types of Reports: Query, BI Publisher, and Pivot Grid.

Query

Query Viewer is a reporting tool used in INFORMS to extract precise information using specific records, criteria and prompts from the database.

Query Viewer is accessible by everyone with the appropriate security and can be used to view Query output in a browser window (HTML), Excel, or XML.

BI Publisher

Oracle provides a standalone Java-based reporting technology named **BI Publisher (BIP)** that streamlines report and form generation. BI Publisher for INFORMS Enterprise provides an environment for managing templates, data sources, reports, translations, and content components based on the provided data source.

View and schedule query-based reports with BI Publisher. Custom reports can be run as well as query-based reports batch through the Process Scheduler or online.

PIVOT GRID

INFORMS Pivot Grid supports operational dashboard reporting to provide a pivot table and chart representation of data using INFORMS Query, Composite Query, and component data source. The framework also enables users to see different views of the data, as in a Microsoft Excel pivot table, and the same data is also available in a chart view.

- Using Pivot Grid, data can be viewed in these different visualizations:
 - **Pivot Grid only:** View the operational reporting data in a grid, where data pivoting and slicing and dicing is possible.
 - **Chart only:** View the operational reporting data in a chart, change the axis, filter the results, drill down to other dimensions and detail. In addition, users can display the grid from a chart-only view and then perform various actions—such as pivoting data, dragging and dropping, and slicing and filtering data—to change the grid layout. After the layout is satisfactory, users can synchronize the chart with the grid view.
 - **Pivot Grid and chart:** View the operational reporting data in both a grid and a chart. The data between the grid and the chart is synchronized.

Lesson 2: Reporting and Inquiry

Lecture 1: Running and Viewing Reports

The available reports are:

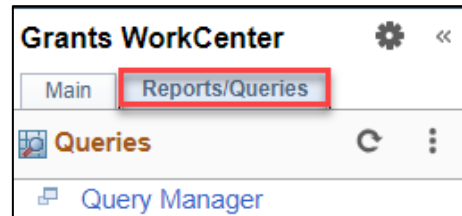
Report Name	Description
Award Profile Inquiry Report	The purpose of the Award Profile Inquiry report is to provide a summary of Grant Awards connected to the Customer Contract information under a specific Business Unit.
Contracts Inquiry Report	<p>The purpose of the Contracts Inquiry report is to provide a summary of the Customer Contract and its associated projects and to guide the users to look at the specific project information through the report.</p> <p>The report provides the user the general information of the project such as:</p> <ul style="list-style-type: none"> • Contract Header Information • Contract Line Information • Associated Projects and Activities
Projects Inquiry Report	<p>The purpose of the Project Inquiry report is to provide a summary of projects under a specific Business Unit.</p> <p>The report provides the user the general information of the project such as:</p> <ul style="list-style-type: none"> • Header Information • Dates • Status • Project Manager Information • Project Location Information
Projects Transaction Inquiry Report	<p>The purpose of the Project Transaction Inquiry report is to provide a summary of the transactions for each project and activity for each business unit. The report will be published as a pivot grid so that an analysis of the amounts per analysis types can be visualized.</p> <p>The report provides the user the general information of the project such as:</p> <ul style="list-style-type: none"> • Project Transaction Information • Chart of Accounts • Related Transactions

Lesson 2: Reporting and Inquiry

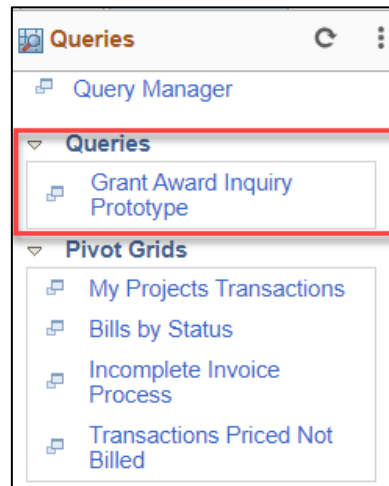
Lecture 1: Running and Viewing Reports

Run a Query

1. From the INFORMS home page, navigate to **Finance/Supply Chain (FSCM) tile > Select Grants Management tile > Select Grants**.
2. On the left-hand navigation, select **Grants WorkCenter**.
3. On the Grants WorkCenter, select on the **Reports/Queries** Tab.




4. Select a Query under the **Queries** Section.




5. Enter filter criteria.

Note: Some queries will have prompts that will also control what information is returned in the results. Depending on the Query, 1 or more Criteria may be required.

SF_MDC_GM_AWDINQ_PROT - Grant Award Inquiry Prototype

Business Unit 

Contract

Project 

Descr

PI ID

County Grant Number

6. Select **View Results**.

Lesson 2: Reporting and Inquiry

Lecture 1: Running and Viewing Reports

Run a Query

SP_MDC_GM_AWARDING_PROT1 - Grant Award Inquiry Prototype

Business Unit: FR

Contract:

Project:

Descr:

PI ID:

County Grant Number:

[View Results](#)

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (41 kb)

View All

Row	Business Unit	Award ID	County Grant Number	Contract Number	Award Title	Award Status	Purpose	Award Type	Customer ID	Award PI	Begin Date	End Date	CFDA	Contract	Contract Line Number	PC Business Unit	Project	Activity	Total Contract Amount	Total Line Billing Limit	Billed Amount
3	FR	CON41		Fed Test Bill	Fed Test Bill	ACP	FG	DHS	9999999999	03/23/2020	12/31/2020	CFDA-10.054	CON41		1	MDADE	FRFEDGRANT	0000000000000001	50200.000	50100.000	10002.000

First 1-51 of 51 Last

Note: Export results to Excel, CSV Test File or XML File.

[View Results](#)

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (41 kb)

View All

Row	Business Unit	Award ID	County Grant Number	Contract Number	Award Title	Award Status	Purpose	Award Type	Customer ID	Award PI	Begin Date	End Date	CFDA	Contract	Contract Line Number	PC Business Unit	Project	Activity	Total Contract Amount	Total Line Billing Limit	Billed Amount
3	FR	CON41		Fed Test Bill	Fed Test Bill	ACP	FG	DHS	9999999999	03/23/2020	12/31/2020	CFDA-10.054	CON41		1	MDADE	FRFEDGRANT	0000000000000001	50200.000	50100.000	10002.000

First 1-51 of 51 Last

Note: When a query run to HTML shows more than 100 lines of data, select **Next Page** to advance to the next 100 lines.

[View Results](#)

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

View All

Row	Business Unit	Contract	Description	Sold To Customer	Customer Name	Contract Status	Contract Type	Contract Signed	Contract Administrator	Total Negotiated	Line Number	Line Description	Quantity	Gross Invoice Amount	Billing Plan ID	Revenue Plan	Product	PC Business Unit	Project
-----	---------------	----------	-------------	------------------	---------------	-----------------	---------------	-----------------	------------------------	------------------	-------------	------------------	----------	----------------------	-----------------	--------------	---------	------------------	---------

First 1-100 of 1-1000 c

Lesson 2: Reporting and Inquiry

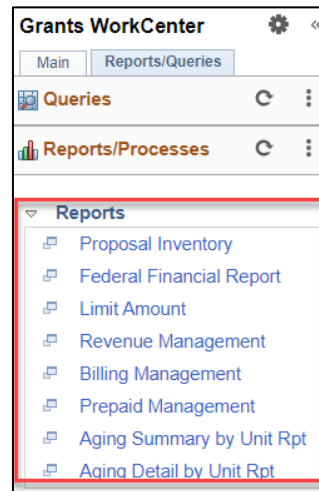
Lecture 1: Running and Viewing Reports

Run a BI Publisher Report:

1. From the INFORMS home page, navigate to **Finance/Supply Chain (FSCM)** tile > **Select Grants Management** tile > **Select Grants**.
2. On the left-hand navigation, select **Grants WorkCenter**.
3. On the **Grants WorkCenter**, select on the **Reports/Queries** tab.

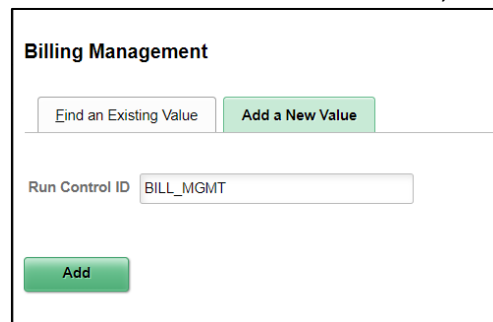


4. Select a **Reports** under the Reports/Processes section.



5. Select **Add a New Value** to create a Run Control ID and give the Run Control a Description.

Note: The **Control ID** needs to be created once. Once created, it may be re-used.

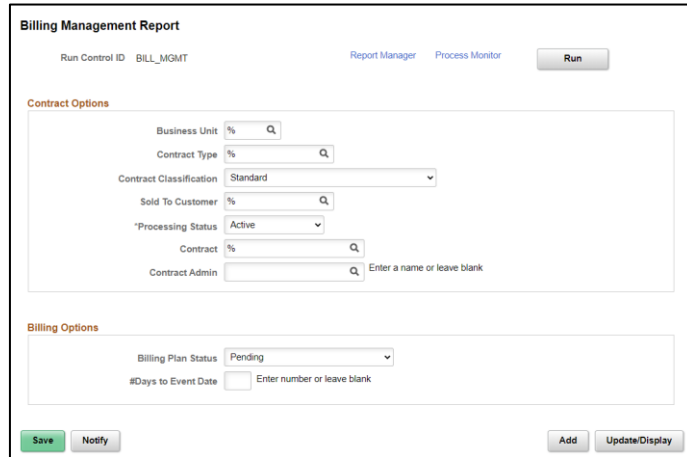


6. Select **Add**.
7. Enter criteria in the **Run Control Options** page.

Lesson 2: Reporting and Inquiry

Lecture 1: Running and Viewing Reports

Run a BI Publisher Report :



Billing Management Report

Run Control ID BILL_MGMT [Report Manager](#) [Process Monitor](#) [Run](#)

Contract Options

Business Unit %

Contract Type %

Contract Classification Standard

Sold To Customer %

*Processing Status Active

Contract %

Contract Admin Enter a name or leave blank

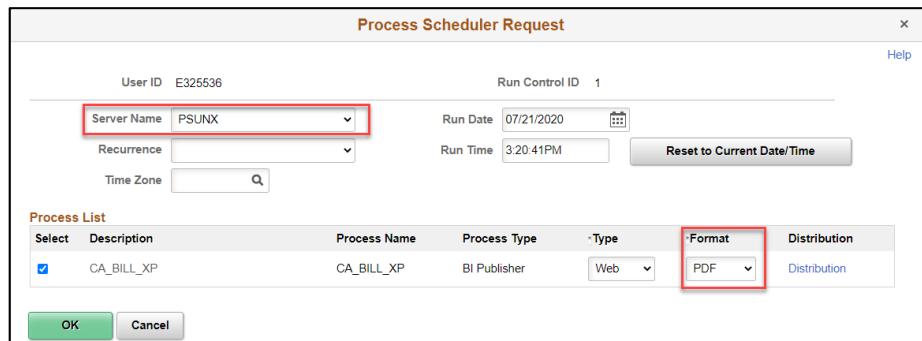
Billing Options

Billing Plan Status Pending

#Days to Event Date Enter number or leave blank

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

8. Select **Save**.
9. Select **Run**.
10. Enter **PSUNX** in the **Server Name** dropdown menu.
11. Enter **PDF** under **Format**.



Process Scheduler Request

User ID E325536 Run Control ID 1 [Help](#)

Server Name PSUNX

Run Date 07/21/2020

Recurrence

Run Time 3:20:41PM [Reset to Current Date/Time](#)

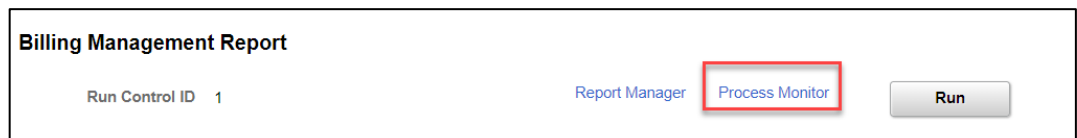
Time Zone

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	CA_BILL_XP	CA_BILL_XP	BI Publisher	Web	PDF	Distribution

[OK](#) [Cancel](#)

12. Select **OK**.
13. Select **Process Monitor**.



Billing Management Report

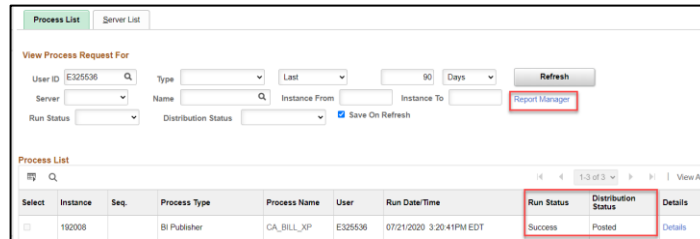
Run Control ID 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Lesson 2: Reporting and Inquiry

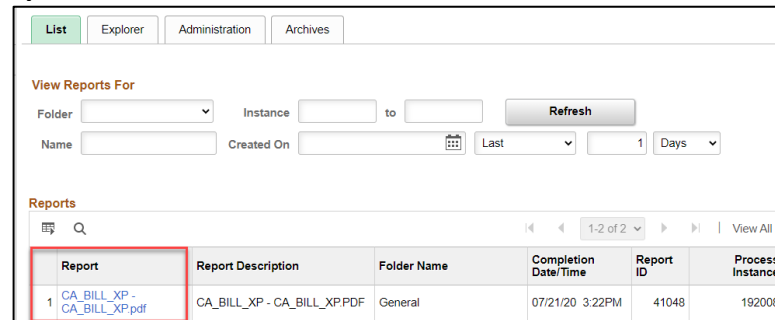
Lecture 1: Running and Viewing Reports

To Run a BI Publisher Report :

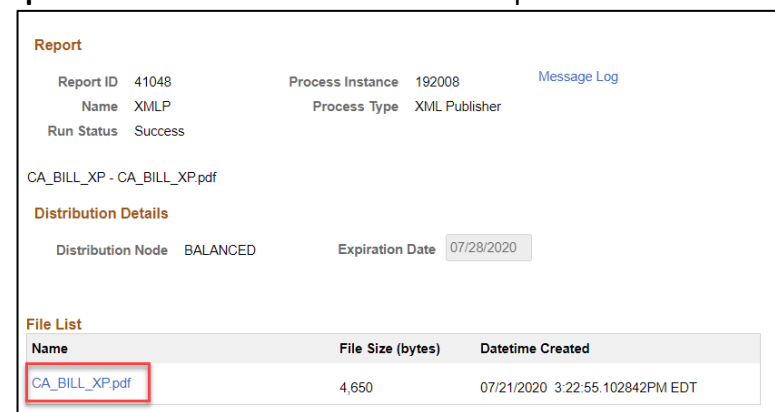
14. Once the report has run to **Success** and has a distribution status of **Posted**, select the **Report Manager** link.



15. Select the **Report** link.



16. Select the **Report** link under **File List** to view the report.



Contracts Billing Management Report														Page 1 of 1 7/21/2020
Business Unit:		FR Fire Rescue												
Contract Currency:		USD												
Sub Id	Contract	Contract Line	Bill Plan Id	Billing Method	Event Num	Event Type	Event Status	Milestone Num	Milestone Desc	Event Date	Amount			
DHS	AMEND TEST	CONTRACTS	B101	Milestone	1	Milestone	Ready	Contract	1	3/11/2020	2,500.00			
DHS	AMEND TEST	CONTRACTS	B102	Milestone	2	Milestone	Ready	Contract	2	3/11/2020	2,500.00			
DHS	AMEND TEST	CONTRACTS	B102	Milestone	1	Milestone	Ready	Contract	3	3/11/2020	0.00			
DHS	CON41	CONTRACTS	B102	Milestone	2	Milestone	Ready	Contract	4	3/11/2020	0.00			
DHS	CON41	CONTRACTS	B101	As Inured	1	Date	Ready	Contract	4	3/23/2020	0.00			
DHS	SF0101	CONTRACTS	B102	Milestone	1	Milestone	Ready	Contract	3	3/11/2020	3,000.00			
DHS	SF0101	CONTRACTS	B101	Milestone	2	Milestone	Ready	Contract	4	3/11/2020	3,000.00			
DHS	SF0101	CONTRACTS	B102	Milestone	1	Milestone	Ready	Contract	1	3/11/2020	1,500.00			
DHS	SF0101	CONTRACTS	B102	Milestone	2	Milestone	Ready	Contract	2	3/11/2020	4,500.00			
DHS	SF0101	CONTRACTS	B103	Milestone	1	Milestone	Ready	Contract	5	3/11/2020	2,500.00			
DHS	SF0101	CONTRACTS	B103	Milestone	2	Milestone	Ready	Contract	6	3/11/2020	2,500.00			
DHS	SF0103	CONTRACTS	B101	As Inured	1	Date	Pending	Contract		3/26/2020	0.00			
DHS	SF0104	CONTRACTS	B101	As Inured	1	Date	Pending	Contract		3/17/2020	0.00			
DHS	SF0106	CONTRACTS	B101	As Inured	1	Date	Pending	Contract		3/17/2020	0.00			
FR000000000	PARKS, PICTURES, LLC	CONTRACTS	B101	Milestone	1	Date	In Prog			6/17/2020	500.00			
FR000000000	PARKS, PICTURES, LLC	CONTRACTS	B101	Milestone	2	Date	Pending			7/17/2020	500.00			
FR000000000	PARKS, PICTURES, LLC	CONTRACTS	B102	Milestone	1	Date	In Prog			6/19/2020	500.00			
FR000000000	PARKS, PICTURES, LLC	CONTRACTS	B103	Milestone	1	Date	In Prog			6/19/2020	250.00			
FR000000000	PARKS, PICTURES, LLC	CONTRACTS	B104	Milestone	1	Date	In Prog			6/23/2020	250.00			
Totals for BU FR in USD												28,000.00		

Lesson 2: Reporting and Inquiry

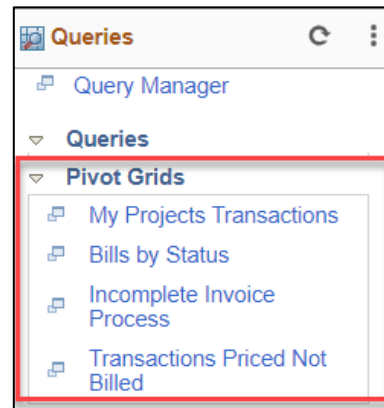
Lecture 1: Running and Viewing Reports

To view a Pivot Grid Report:

1. From the INFORMS home page, navigate to **Finance/Supply Chain (FSCM)** tile > **Select Grants Management** tile > **Select Grants**.
2. On the left-hand navigation, select **Grants WorkCenter**.
3. On the **Grants WorkCenter**, select the **Reports/Queries** tab.

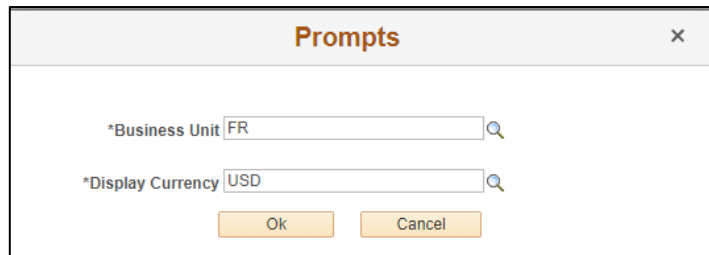


4. Select a **Pivot Grid** under the **Pivot Grids** section.



5. Enter **Prompt Values**.

Note: Some Pivot Grids will have prompts that will control what information is returned in the results. Depending on the Pivot Grid, 1 or more criteria may be required.

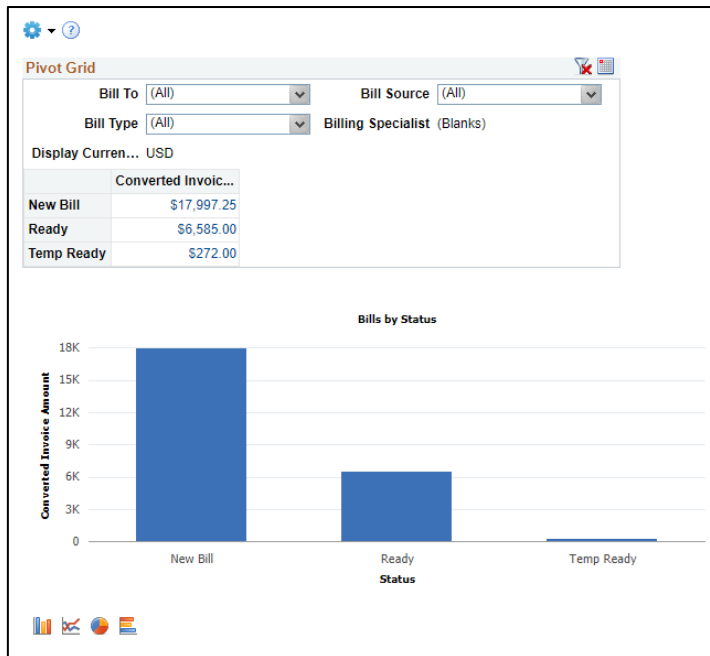


Lesson 2: Reporting and Inquiry

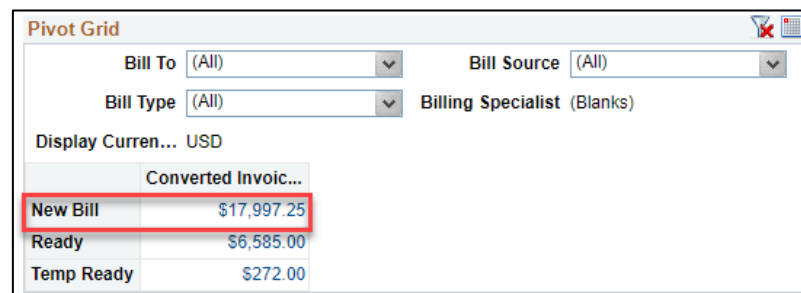
Lecture 1: Running and Viewing Reports

To view a Pivot Grid Report :

6. Select **Search**.



Optional: To further drill down on any data element, select the blue hyperlink connected to the data value.



Pivot Grid

Bill To: (All) Bill Source: (All)
 Bill Type: (All) Billing Specialist: (Blanks)

Display Curren... USD

	Converted Invoic...
New Bill	\$17,997.25
Ready	\$6,585.00
Temp Ready	\$272.00

Pivot Grid Drilldown

Lesson 2: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the User Productivity Kit (UPK).

Scenario This lesson focuses only on running reports and not on any other types of processes. Because a report is a type of process, these two terms may be used interchangeably, depending upon the context in which they are used.

Instructions This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

Users will determine how to perform the activity by following the data sheet and by using the training materials as reference tools.

There are Instructors in the room to assist if there are any questions.

Relevant Resources Remember, the following resources available:

- Activity: Running and Viewing Reports Training Exercise
- Activity: Running and Viewing Reports Data Sheet

Lesson 2: Training Exercise

Debrief



1. What report provides a summary of Grant Awards?

2. Where can I find a list of my reports?

Lesson 2: Lesson Summary

Lesson Summary

Having completed the Reporting and Inquiry lesson, users should be able to:

- Locate and run Reports



Objectives Achieved



- Create and Maintain Grants
 - Pre-Requisites to Establishing the Award Profile
 - Establishing an Award Profile
 - Award Profile
- Reporting and Inquiry
 - Running and Viewing Reports

Module 3: Course Summary

Additional

Training and Job

Aids

Users also have the following resources available:

User Productivity Kits

- Create and Update an Award Profile
- Running and Viewing Grant Reports

Job Aids

- N/A

For additional Information, be sure to visit:

- Miamiidade.gov/informs

Module 3: Course Summary

Key Terms



The following key terms are used in this course:

Term	Definition
Award	Award represents the final agreement between the sponsor and the state agency for receipt and expenditure of funds.
Award Profiles	Grant Management award that will store grant demographic information such as grant types, sponsor agency, CFDA/CSFA, etc. Award profile IDs match grant ChartField values. Award amount will equal sponsored amount.
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Sponsor	The Sponsor represents the Grants funding source. The customer who will be invoiced for expense reimbursements associated with the award.
Subrecipients	Subrecipients are entities or individuals that receive Grants funding from the primary Grantee within the parameters of a Grants