Introduction to PeopleSoft Grants Management

Shari Nguyen

Agenda

- Award Lifecycle and Structure
- Overview of PeopleSoft Pages
- Subcontracts
- Cost Sharing
- Expenses
- Clinical Trials
- Award Closeout
- Budget Statement
- Reports
Award Lifecycle and Structure

PeopleSoft Lifecycle

- InfoEd Interface
- Award Setup
- Invoicing
- Cost Sharing
- Industry Clinical Trials
- Spending
- Award
- Maintenance
- Closeout
Award ➞ Project ➞ Activity

Award
One Award for a sponsor grant or contract.

Project(s)
Associate one or more projects to an Award depending on rules of the Award. Also used for individual transactional data, upon request of PI or department/center.

Activity(ies)
Associate one or more activities to a Project when NU must account for each budget period separately.

Award ID = InfoEd Proposal ID

Project ID and Activity

<table>
<thead>
<tr>
<th>Fund</th>
<th>Area</th>
<th>Org</th>
<th>Obj/Rev</th>
</tr>
</thead>
<tbody>
<tr>
<td>0600</td>
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<td>D313</td>
<td>7560</td>
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<table>
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<tr>
<th>Fund</th>
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<th>Project</th>
<th>Activity</th>
<th>Program</th>
<th>Account</th>
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<tr>
<td>610</td>
<td>4011000</td>
<td>60012366</td>
<td>01</td>
<td>Suborgs</td>
<td>77560</td>
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</table>

Project – 60012366 (unique system generated number) for Grants always begins with a 6******

Activity – 01 (additional activities will be added if the sponsor does not allow carryover from one period to the next)
New Funds

<table>
<thead>
<tr>
<th>Fund</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>610</td>
<td>Federal Grants and Contracts</td>
</tr>
<tr>
<td>620</td>
<td>Federal Flow-Through</td>
</tr>
<tr>
<td>630</td>
<td>State of Illinois Funding</td>
</tr>
<tr>
<td>640</td>
<td>Industry Clinical Trials</td>
</tr>
<tr>
<td>650</td>
<td>Other Grants and Contracts</td>
</tr>
<tr>
<td>191</td>
<td>Mandatory Cost Sharing</td>
</tr>
<tr>
<td>192</td>
<td>Non-Mandatory Salary Commitment</td>
</tr>
</tbody>
</table>

Award Setup

Data Conversion from CUFS and InfoEd
Active and Closed Awards with activity since 9/1/2006

- Data converted from CUFS includes:
  Budget, Cost-Share, open AR items (invoices), Dates
- Data converted from InfoEd includes:
  Demographics, Project Personnel
- All budget and expense data will be converted to Activity 01
  - If additional activities are needed after go-live, they will start with 02
- Which expenses will be converted?
**Award Setup – Converted Expense Data**

9-1-06

- **$100K**
  - January
  - February
  - March
  - April
  - May
  - June

Cumulative summary of expenses prior to 9/1/06.

Monthly summary of expenses after 9/1/06.

* Go to CUFS for detail data

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**Data Availability**

- FY 2008 (through July) actual expenses will be available in PeopleSoft
  - August 2008 will be available mid-September
- FY 2009 actual expenses will be available in PeopleSoft at go-live (target 9/2/08)
Security

- Schools/Units have View-Only access to PeopleSoft & InfoEd
  - Data entry by OSR/ASRSP only
- Security Matrix-Access matched to department or project team
- Report discrepancies (security or incorrect data) to help desk

Applications and their Uses

<table>
<thead>
<tr>
<th>Application</th>
<th>Uses</th>
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<tbody>
<tr>
<td>InfoEd</td>
<td>Pre-Award &amp; Post-Award data- individual proposals or awards</td>
</tr>
<tr>
<td></td>
<td>- Budget snapshot</td>
</tr>
<tr>
<td></td>
<td>- Contract negotiations</td>
</tr>
<tr>
<td></td>
<td>- Committed effort &amp; cost-sharing</td>
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<tr>
<td>Cognos</td>
<td>Reporting on InfoEd &amp; PeopleSoft data</td>
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<tr>
<td></td>
<td>- Monthly, quarterly, &amp; annual financial reports</td>
</tr>
<tr>
<td></td>
<td>- Summary-level proposal/award reports</td>
</tr>
<tr>
<td>PeopleSoft</td>
<td>Post-Award financial data-budget &amp; expenditures</td>
</tr>
<tr>
<td></td>
<td>- Account level balance</td>
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<tr>
<td></td>
<td>- % Remaining for spending decisions</td>
</tr>
<tr>
<td></td>
<td>- F&amp;A distribution</td>
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Overview of PeopleSoft and Grants

Award Demographics
Award Demographics
Award Demographics

Award ID: SP0036251
Reference Award: 2R01AI212345-05A2
Number: Nguyen, Shari Louise
Primary Project PI: Haq, Fazale M

Description: Federal Demonstration Partnership
Explanations:

Milestone Type: TECHR
Milestone Code: TECHR
Due Date: 11/20/2010
Priorities: Medium
Completed By:

Go To: Sponsor, Protocols, Attributes, Department, Credit, Report, Award Modifications

Award Demographics

Award ID: SP0050261
Reference Award: 2R01AI52485-06A2
Number: Nguyen, Shari Louise
Primary Project PI: Haq, Fazale M

Milestone Type: TECHR
Milestone Code: TECHR
Due Date: 11/20/2010
Priorities: Medium
Completed By:

Go To: Sponsor, Protocols, Attributes, Department, Credit, Report, Award Modifications
Project Demographics
Subcontracts

Department
- Creates requisition when award is received
- PI reviews and signs invoices and sends to ASRSP
- Department creates receipt for invoices on purchase order by line (< or > $25,000)
Subcontract Inquiry

Cost Sharing
Cost Sharing: Policies

New Cost Sharing Policies
Cost Share Funds may be associated with each project
- Fund 191 (Mandatory Cost Sharing and Voluntary Committed Non-Salary Cost Sharing)
- Fund 192 (Over-the-cap and Voluntary Committed Salary)

Cost Sharing: Fund 191

Fund 191 - Mandatory Cost Sharing Process
OSR
- Cost share budget will be established for each project when included in award terms
- Initiate budget journal transfer of mandatory & voluntary commitments
  - Chart-string indicated in Commitments section of OSR-1
  - Journal processed through workflow

Department
- Monitor budget transfers and expenditures in their Fund 191 Budget Statement or Cost Sharing Report
Cost Sharing Example

Fund 191 - Mandatory Cost Sharing Example
Award in Chemistry includes $100,000 piece of equipment to be funded by:
  - Sponsor: $50,000
  - VPR: $25,000
  - WCAS: $12,500
  - Chemistry: $12,500

Cost Sharing Example

At award establishment, OSR initiates budget journal transfers

- $12,500 from WCAS
- $12,500 from Chemistry
- $25,000 from VPR

...to Chemistry “191” fund from non-sponsored accounts for this specific project.

Note: When source is from restricted chart string (e.g., gift or endowment), Department will first need to initiate revenue transfer to unrestricted chart string

Journal transfer processed through workflow with required approvals from WCAS, Chemistry, and VPR
**Cost Sharing Example**

**Spending Example**
Expenses will be charged (as listed on requisitions) to both sponsor and cost-share budget lines for the project
- $100,000 equipment purchase
- Requisition includes two expense lines
  - $50,000 to sponsored fund
  - $50,000 to fund 191
    (Chemistry, but initially funded by WCAS, Chemistry, and VPR)

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**Cost Sharing: Fund 192**

**Fund 192 - Salary (Over-the-cap and Voluntary Committed) Process**

**OSR**
- Establish $0 cost-share budget for each project & department with impacted personnel on award

**Department (Direct Charging)**
- Expense over-the-cap and voluntary committed portions of salary in HRIS funding to Fund 192 + Project ID
- Responsible for initiating budget journal from non-sponsored account to cover
  - Expenses will also hit department Fund 192 budget statement
Cost Sharing: Conversion

Conversion of cost share data

- “C” Accounts:
  - Converting budget and expenses to Fund 191
  - Spend immediately with new process outlined

- 8799 Object Code:
  - Converting historical credits “as is”

- 0037 Accounts (FSM)
  - Balance should be zero on August 15
  - If not, converted to project chart string with NO BUDGET

Cost Sharing: Conversion

Bridge for 0037:
Setting up Fund 191 for Mandatory cost sharing to continue on existing awards

- Departments
  - Notify OSR to open Fund 191 on existing (converted awards) with remaining mandatory commitments

- OSR
  - Establish Fund 191 project budget lines per above
  - Initiate budget journal transfer per process
Cost Sharing: Conversion

Bridge for 0037: Enabling over-the-cap spending in HRIS on converted awards

OSR
- Identify all PIs/projects with 0037 Funding lines for September 30 (and beyond) payroll
- Create $0 budget lines on fund 192 for all projects and associated departments by September 16

Department
- September 16-25: Correct Funding in HRIS for Sept. 30 payroll
  - Delete “converted” Fund 192 funding line
  - Enter all Fund 192 salary lines in HRIS for September (and beyond) payroll for all projects

Cost Sharing-Direct Charging in HRIS
Over-the-cap funded by home department
Cost Sharing-Direct Charging in HRIS
Over the cap funded by different department

Cost Sharing

Benefits of New Policies

- Effort Report Accuracy
  - Salary direct charge: sponsor & cost share effort linked to project

- Flexibility
  - Multiple departments can fund over-the-cap cost sharing in HRIS for same project

- Cost share tracking by project
  - Fund 191 and 192 expenses reported on Sponsored Project Budget Statement (GM045)
    - Subtotals: Sponsor, Mandatory, Non-Mandatory Salary
  - Cost Share Status Report - track departmental cost sharing and verify funding by project
ASRSP approval required for the following:

- Transactions charged to Sponsored Projects for tangible goods over $2,500
  - University Vendors/Requisition process
  - P-cards encouraged
- Any grant-related travel expense, regardless of amount
- Any grant consulting or subcontractor related expense, regardless of amount
## Expenses and Invoicing

### New Billing Process (Non-Industry Clinical Trials)

1. Automatic billing in batch process
2. All transactions **must** be entered in a timely fashion to the sponsored project, as invoices are created from posted expenses

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## Clinical Trials
New Industry Clinical Trial Policy

Clinical Trials will be budgeted at the maximum amount (potential total budget) and not with incremental budget increases as cash is received.

Expectations:
- Total expenses will not exceed final cash received.
- PAS will no longer be generated with each check deposit. Departments will review Cognos reports to understand the cash balance.
- If no end date is specified, the initial project period will be 3 years.
- Direct cost residual balances will be transferred after closeout to non-sponsored chart strings.
- Any overdrafts at closeout will be transferred to the department chart string and covered by department non-sponsored funds.

Award Closeout
Award Closeout

- Notification will be sent 2 months before the project end date to the PI and Department Administrator
- At Project End date, status = Finished (prevents processing of requisitions or payroll)
- Complete the Closeout Checklist

Reporting
Reports

<table>
<thead>
<tr>
<th>OLD REPORT NAME</th>
<th>NEW REPORT NAME</th>
<th>PURPOSE</th>
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<tbody>
<tr>
<td>NG32</td>
<td>GM045 – Sponsored Project Budget Statement</td>
<td>View Budget and Expenses by Sponsored Project</td>
</tr>
<tr>
<td>SNUPER (Account Summary Tab)</td>
<td>GM044 – Sponsored Project Portfolio</td>
<td>Provide snapshot of active award balances by PI</td>
</tr>
<tr>
<td>PAS Report</td>
<td>PAS Report</td>
<td>Notification of new award/funding activated</td>
</tr>
<tr>
<td>N/A</td>
<td>Clinical Trials Activity</td>
<td>View summary clinical trial financial data</td>
</tr>
<tr>
<td>N/A</td>
<td>Milestone Report</td>
<td>Manage sponsor due dates for final reports</td>
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</table>

Sponsored Project Budget Statement
For Fiscal Year 2008
As of Accounting Period 11 - July

Account & Description | Fund | Dept | Activity | (A) Cumulative Budget to Date | (B) Current Period Expenditures | (C) Fiscal Year to Date Expenditures | (D) Remaining Appropriations & Encumbrances | (E) Budget Balance Remaining | (F) Period Available |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
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<td>4014400</td>
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<td>$4,970.00</td>
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## Sponsored Project Budget Statement

### For Fiscal Year 2006

#### As of Accounting Period 11 - July

<table>
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<th>Account &amp; Description</th>
<th>Fund</th>
<th>Dept</th>
<th>Activity</th>
<th>(A) Sponsoring Source Budget to Date</th>
<th>(B) Current Period Expenditures</th>
<th>(C) Fiscal Year to Date Expenditures</th>
<th>(D) Sponsoring Source to Date Expenditures</th>
<th>(E) Open Requirements &amp; Encumbrances</th>
<th>(F) Balance</th>
<th>(G) Encumbered Available</th>
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<td>$0.00</td>
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<td>$0.00</td>
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<td>77900 Scientific Indirect</td>
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<td><strong>Total For Activity</strong></td>
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<td>$31,627.00</td>
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<td>$0.00</td>
<td>$50,115.26</td>
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</tr>
</tbody>
</table>

* Excluded from FPA Calculations

** Calculated FPA on encumbrances

Note: Indirect Project Budget reflects maximum allowed amount. Department is liable for expenses exceeding the cash award received.

I have reviewed the expenditures charged to this sponsored account for the applicable period and believe to the best of my knowledge that they are appropriately expensed in the project in accordance with federal or other sponsor regulations, university policy, and the specific terms and conditions of the award.

Principal Investigator: [Signature]

Date: [Date]

---

## Sponsored Project Portfolio

### Department: 4011450 Chemistry

**PI: Sclaire, Jane R**

<table>
<thead>
<tr>
<th>Project #</th>
<th>Activity</th>
<th>Description</th>
<th>Sponsor</th>
<th>Sponsor Reference Text #</th>
<th>Budget Period Start Date</th>
<th>Budget Period End Date</th>
<th>Cumulative Budget to Date</th>
<th>Direct Cost Expenditures</th>
<th>Direct Cost Balance</th>
<th>FPA Expenditures</th>
<th>FPA Balance</th>
<th>Available Balance</th>
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<td>Madison Bellwether Education Center</td>
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<td>12/31/08</td>
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<td>$500.00</td>
<td>$31,627.40</td>
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<tr>
<td>80117249</td>
<td>31</td>
<td>P-2022</td>
<td>Natural Science Foundation</td>
<td>P-2022</td>
<td>1/1/08</td>
<td>12/31/08</td>
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<td>1/1/08</td>
<td>12/31/08</td>
<td>$31,627.40</td>
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<td>$500.00</td>
<td>$500.00</td>
<td>$31,627.40</td>
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</table>

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Project Budget Overview

Grant/Project: JP-LOC1 / 60017513
PI: Scholar, Jason R
Sponsor: Woodrow Wilson International Center for Scholars
Award #: 1259570/12450/12450/12450/12450/12450/12450/12450/12450/12450
Project Dates: 1/1/08 - 1/31/08
GCFA: Michael Daniels
GCLT: Campbell/Lane G
Clinical Trial: No

Activity: 01
F&A Rate and Basis: 51.0%; MTDCN

<table>
<thead>
<tr>
<th>Description</th>
<th>Budget</th>
<th>Expense</th>
<th>Encumbrance</th>
<th>Budget Balance</th>
<th>Percent Available</th>
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<tbody>
<tr>
<td>Academic Personal</td>
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<td>$5,500</td>
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<td>Fringe Benefits</td>
<td>$2,500</td>
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<tr>
<td>SUPPLEMENT</td>
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<td>F&amp;A</td>
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Mandatory Cost Sharing - Fund 991

<table>
<thead>
<tr>
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<th>Budget</th>
<th>Expense</th>
<th>Encumbrance</th>
<th>Budget Balance</th>
<th>Percent Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Equipment</td>
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<tr>
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<td>0.0%</td>
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<td>$0.00</td>
<td>$0.00</td>
<td>0.0%</td>
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<tr>
<td>Total for Activity 01</td>
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<td>$13,661</td>
<td>$0.00</td>
<td>$20,216</td>
<td>55.4%</td>
</tr>
<tr>
<td>Total for Project 60017513</td>
<td>$33,877</td>
<td>$13,661</td>
<td>$0.00</td>
<td>$20,216</td>
<td>55.4%</td>
</tr>
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</table>

PROJECT ACCOUNT SUMMARY

Award Information - JP-LOC1

<table>
<thead>
<tr>
<th>Title</th>
<th>Award #: JP-LOC1</th>
<th>Scholar, Jason R</th>
<th>New Sponsor Funding</th>
<th>New Cost Share Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsor</td>
<td>Woodrow Wilson International Center for Scholars</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct</td>
<td>631,713</td>
<td>15</td>
<td>631,713</td>
<td>631,713</td>
</tr>
<tr>
<td>F&amp;A</td>
<td>45,140</td>
<td>15</td>
<td>45,140</td>
<td>45,140</td>
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</tbody>
</table>

Cumulative Award Budget to Date

<table>
<thead>
<tr>
<th>Direct Cost Budget</th>
<th>F&amp;A Costs Budget</th>
<th>Total Cost Share Budget</th>
<th>Total Budgeted</th>
</tr>
</thead>
<tbody>
<tr>
<td>$21,744.00</td>
<td>$1,007.40</td>
<td>$22,751.40</td>
<td>$22,827.40</td>
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Project Details - 60017513

<table>
<thead>
<tr>
<th>Department Description</th>
<th>Chemistry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project #: 60017513</td>
<td>631,713</td>
</tr>
<tr>
<td>Project #: 451,140</td>
<td>45,140</td>
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</table>

Activity: 01

<table>
<thead>
<tr>
<th>Type</th>
<th>Project #: 631,713</th>
<th>Fund</th>
<th>Dept</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funded</td>
<td>631,713</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sponsored</td>
<td>631,713</td>
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</table>

Sponsored Project Budget Details - Activity 01 Budget Period Ending 12/31/08

<table>
<thead>
<tr>
<th>Description</th>
<th>Dept</th>
<th>Fund</th>
<th>Activity</th>
<th>New Budgeting</th>
<th>Previous Budgeting</th>
<th>Cumulative Budget to Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic</td>
<td>631,480</td>
<td>630</td>
<td>01</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Fringe Benefits</td>
<td>631,480</td>
<td>630</td>
<td>01</td>
<td>$0.00</td>
<td>$2,240.00</td>
<td>$2,240.00</td>
</tr>
<tr>
<td>Supplies</td>
<td>631,480</td>
<td>630</td>
<td>01</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Subtotal Direct Costs | $300.00 | $2,240.00 | $2,540.00 |

F&A | 451,140 | 630 | 15 | $13,000.00 | $13,000.00 | $13,000.00 |

Subtotal Sponsored Budget | $2,830.00 | $13,000.00 | $15,830.00 |
Clinical Trials Activity Report

<table>
<thead>
<tr>
<th>Award ID</th>
<th>Sponsor Reference Award #</th>
<th>Sponsor Name</th>
<th>Award PI</th>
<th>Department</th>
<th>Primary Project ID</th>
<th>Project Title</th>
<th>Project Period</th>
<th>UIC%</th>
<th>Min Award Amount</th>
<th>Max Award Amount</th>
<th>Cumulative Expenses</th>
<th>Total Cash Received</th>
<th>Fiscal Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP0001287</td>
<td>-</td>
<td>Covance Preclinical Services, Inc.</td>
<td>Kukkuri, Yatim</td>
<td>Chemistry</td>
<td>60018726</td>
<td>Prod1 121: Testing Drugs 1/25</td>
<td>7/1/08 - 12/31/08</td>
<td>26.0%</td>
<td>$3,150,000.14</td>
<td>$3,150,000.14</td>
<td>$226.00</td>
<td>$5,000.00</td>
<td>2008</td>
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</table>

Total: $3,150,000.14 $226.00 $5,000.00

Milestone (Deliverable) Report

<table>
<thead>
<tr>
<th>Award ID</th>
<th>Sponsor Name</th>
<th>PI Name</th>
<th>Department</th>
<th>Start Date</th>
<th>Due Date</th>
<th>Title</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Michael</td>
<td>Howard, Jeremy, A</td>
<td>H. J.</td>
<td>Chemistry</td>
<td>11/08</td>
<td>12/30/08</td>
<td>PI222</td>
<td>Pre-Paid</td>
<td>Pre-Paid status report submitted within 3 months of award.</td>
</tr>
</tbody>
</table>

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Additional Courses

FMS114 - Understanding Seminal Reports
- Detailed information on the commonly used reports
- Begins August 13th

FMS803 – Ordering Hands-On
- Non-Catalog Special Requisition: Grant Subcontract

FMS 805- Receiving (Demo)
- Receiving subcontract invoices

Help Desk

• 1-HELP (option 7)
• consultant@northwestern.edu
Questions...