Single Use Accounts

What is changing:

For specific types of awards a Single WBS will be created for the entire project period

Example: NIH R01

Awards that require annual financial reporting are excluded

Example: New York State Contract

Benefits of single WBS:

Easier to create and close out accounts

No need to complete soft-close for non-competing accounts until FFR is due

Commitments can be made throughout the life of the Sponsored Program, including Change of Funding
Enhanced BI Reporting

- Grant Statement and Grant Detail Statement data will be merged into a single report called the “Sponsored Program Report”

- This new report will be available on BI Launch Pad Analysis for Excel

There are total 5 tabs in the Report:

**Summary Tab** – The overview of Budget, Expense and Commitments.

**SP Statement Tab** – Sponsor Program activity displayed by Direct Expenses versus Indirect Expenses

**SP Detail Statement** – Sponsor Program activity displayed at the detailed transaction level

**Receipts** – Cash receipt details starting from FY18.

**Information** - Report properties, variables and help files
BI Reporting

After Login you can see the Tab – BI Launch Pad – Click on it.

A Pop up window will appear where you need to click on Tab - Documents
BI Reporting

Public Folders – Enterprise Service – Finance – Grant Management: The report-Sponsor Program Statement
Click on the report - > Prompt screen will come up where Grant Valid To Period (Mandatory) and Sponsor Program (Mandatory), need to be put as input - > Click Ok
The default view will be the summary tab.
BI Reporting

The second tab will be the SP Statement Tab
BI Reporting

The Budget can be expanded to display the following breakdown.

1. PTD Notice of Award
2. PTD Budget Revision
3. Carry Forward
4. Total Budget

The budget can then be further broken down by the budget years.
Commitment field can be expanded to display the following types of commitments:
1. Fund Reservation
2. PO Commitments
3. Labor Commitments
Training & Go-Live

There were 4 webinars (webinars are recorded for future reference).

Tuesday, January 30th: 10:00am – 11:00am
Wednesday, January 31st: 2:00pm – 3:00pm
Monday, February 5th: 2:00pm – 3:00pm
Wednesday, February 7th: 10:00am – 11:00am

Coaching labs are scheduled at 1300 York Avenue in the ITS Suite, Room LC-02

Monday, February 12th at 2:00pm - 4:00pm
Wednesday, February 14th 2:00pm - 4:00pm
Monday, February 26th at 2:00pm - 4:00pm

Effective Monday, **February 12, 2018**, single WBS will be implemented.

Grant Statement and Grant Detail Statement to be retired **March 12, 2018**.
Questions