



Weill Cornell Medicine

Single Use WBS

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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 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

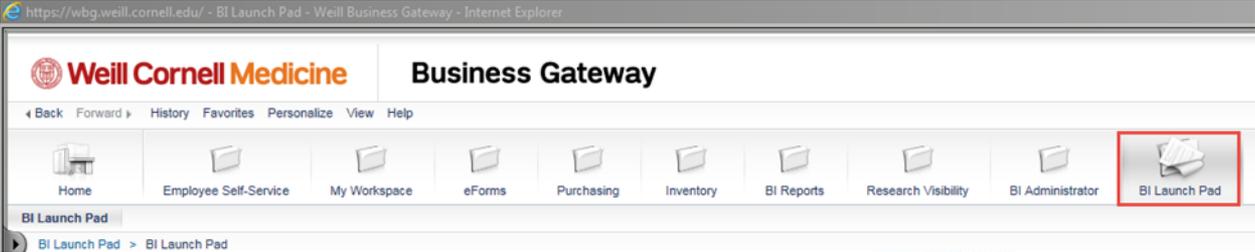
SP Detail Statement – Sponsor Program activity displayed at the detailed transaction level

Receipts – Cash receipt details starting from FY18.

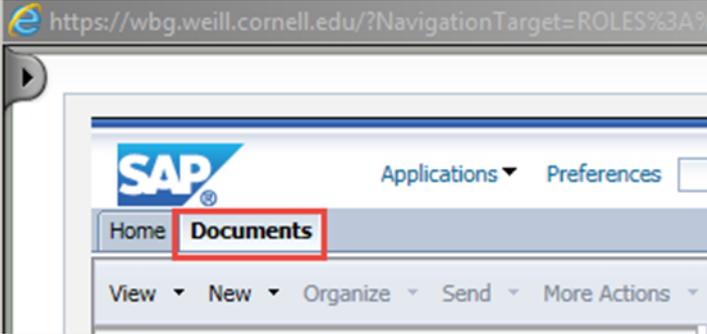
Information - Report properties, variables and help files

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

The screenshot shows a web browser window with the URL <https://wbgqa.hec.weill.cornell.edu/?NavigationTarget=navurl%3A%2F%2Fd7ae802855d9c6aeb92b6d6cc2>. The page header features the Weill Cornell Medicine logo and name. Below the header, there are navigation tabs for 'Home' and 'Documents'. A menu bar includes 'View', 'New', 'Organize', 'Send', 'More Actions', and 'Details'. The main content area is divided into two panes. The left pane, titled 'My Documents', shows a folder tree with the following structure: 'Public Folders', 'Enterprise Services', 'Finance', 'Funds Management', 'General Ledger', 'Grants Management', 'Space Management', 'SRM', and 'Human Resources'. The 'Grants Management' folder is highlighted with a red box. The right pane, titled 'Details', shows a list of documents with the following columns: 'Title' and 'Type'. The list contains two entries: 'Grant Detail Statement' (Analysis Workbook) and 'Sponsor Program Statement' (Analysis Workbook). The 'Sponsor Program Statement' entry is highlighted with a blue background.

Title ^	Type
Grant Detail Statement	Analysis Workbook
Sponsor Program Statement	Analysis Workbook

BI Reporting

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

Use Variant Save the document on the server to enable use of variants

Prompt Summary

- * Grant Valid To Period: JAN 2018
- * FM Area (Single Value): Weill Cornell Med.Coll
- ✓ * Sponsored Program: SINGLE WBS TESTING1
- Grant:
- Sponsored Class Hierarchy (Single Value): GMSP
- Sponsor:
- Funds Center:
- Functional Area:
- External Reference:

Specify Value for Prompts

- * Grant Valid To Period 01/2018
- * FM Area (Single Value) WCMC
- * Sponsored Program = 5250053000
- Grant =
- Sponsored Class Hierarchy (Single Value) Sponsored Class Reporting

Grant Valid To Period (Calmonth/Year) is mandatory Input.
The report logic will determine the valid Grant Year for a Specific Sponsor Program by Comparing the user input with Grant Year Start Date and End Date.

Display OK Cancel

BI Reporting

The default view will be the summary tab.

Sponsor Program Statement.xlsx - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW ANALYSIS

Insert Data Refresh Source All Add Messages Data Source

Create Reload Redo Messages Actions

Prompts Filter Sort Hierarchy Calculations Data Analysis

Combine Members Measures Totals Display

Conditional Formatting New Format Styles Format

Chart Info Filter Insert

Convert to Formula Launch Query Designer Tools

Smart Copy Smart Paste Save View

Display Pause Refresh

Display Design Panel

Show Property View

Show Technical Names

C25

	A	B	C	D	E	F	G	H	I	J	K
1							PTD Budget	PTD Expense	PTD Outstanding Commitments	PTD Balance Available	PTD Balance %
2	Grant	Sponsored Program		Sponsored Class		Years of Validity	\$	\$		\$	\$
3	52500530	5250053000	SINGLE WBS TESTING1	[+] DIRECT	Direct Expense	7	281,000.00	23,782.50	65,500.00	191,717.50	68
4				[+] INDIRECT	Indirect Expense	7	2,000.00	1,112.00		888.00	44
5				[+] PAYMENTS	Payment Received	7					0
6				Result			283,000.00	24,894.50	65,500.00	192,605.50	68
7											

BI Reporting

The second tab will be the SP Statement Tab

Sponsor Program Statement.xlsx - Excel

	A	B	C	D	E	F	G	H	I	J	K	L
1					[+] PTD Budget	[+] PTD Expense	[+] PTD Outstanding Commitments	PTD Balance Available	PTD Balance %	CM Expenses	FYTD Expenses	[+] Future Commitments
2	Sponsored Program	Sponsored Class		Years of Validity	\$	\$	\$	\$		\$	\$	\$
3	5250053000	[+] DIRECT	Direct Expense	7	279,000.00	26,263.27	127,519.32	125,217.41	45	21,202.50	26,263.27	258,992.62
4		G6500	Indirect Cost	7	1,000.00	1,112.00		-112.00	-11	1,112.00	1,112.00	
5		G6501	Indirect Cost Subsidy	7	1,000.00			1,000.00	100			
6		[-] INDIRECT	Indirect Expense	7	2,000.00	1,112.00		888.00	44	1,112.00	1,112.00	
7		G4100	Revenue	7					0	-2,712.00		
8		[-] PAYMENTS	Payment Received	7					0	-2,712.00		
9		Result			281,000.00	27,375.27	127,519.32	126,105.41	45	19,602.50	27,375.27	258,992.62

Callout Boxes:

- Column D:** This Column will display the count of Grant Years for which a Sponsor Program is Valid.
- Column E:** This KF will display Budget upto the Entry period/Grant Year based on user input.
- Column G:** This KF will display Total of Labor, PO & Fund Reservation commitment upto the Entry period/Grant Year based on user input.
- Column I:** This column will display Current MTD expenses as per user input.
- Column K:** This column will display Fiscal YTD expenses as per user.
- Columns F, H, J:** This KF will display Expense upto Posting Period/Grant Year based on User Input. Once expanded, Expenses are broken down by Grant Years (including future).
- Column H:** This KF will display Balance available (PTD Budget - PTD Expense - PTD Outstanding Commitment)
- Column I:** Percentage Of Balance Available
- Column L:** This KF will display Total of Labor, PO & Fund Reservation commitment beyond the Entry period/Grant Year based on user input.

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 by further breakdown by the budget years.

The screenshot shows a BI reporting tool interface with a table of budget data. The table has columns for Sponsored Program, Sponsored Class, Years of Validity, PTD Budget, PTD Notice of Award, Carry Forward, PTD Budget Revision, and Total Budget. The data is as follows:

	B	C	D	E	F	G	H	I	J
					[-] PTD Budget	[+] PTD Notice Of Award	Carry Forward	[+] PTD Budget Revision	[+] Total Budget
1									
2	Sponsored Program	Sponsored Class		Years of Validity	\$	\$		\$	\$
3	5250053000	[+] DIRECT	Direct Expense	7	279,000.00	281,000.00		-2,000.00	279,000.00
4		[+] INDIRECT	Indirect Expense	7	2,000.00	2,000.00			2,000.00
5		[+] PAYMENTS	Payment Received	7					
6		Result			281,000.00	283,000.00		-2,000.00	281,000.00

Callouts from the image:

- Once expanded, the following columns are displayed:
 1. PTD NOA
 2. PTD Budget Revision
 3. Carry Forward
- This KF will display Notice Of Award upto the Entry period/Grant Year based on user input. Once expanded, NOA is broken down by Grant Years (including future)
- This KF will display Carry Forward amount for Non-Single WBS
- This KF will display below Budget Components upto the Entry period/Grant Year based on user input.
 - 1)Returned Budget
 - 2)Supplemental Budget
- This KF will display Total Budget (including Future)

BI Reporting

Commitment field can be expanded to display the following types of commitments

1. Fund Reservation
2. PO Commitments
3. Labor Commitments

PTD Outstanding Commitments:
Once expanded, the following columns are displayed:

1. Fund Reservation
2. PO Commitments
3. Labor Commitments

Commitment for Fund Reservation upto Entry period/Grant Year based on user input

Commitment for Purchase Order valid upto Entry Period/Grant Year based on user input

Labor Commitment valid upto Entry Period/Grant Year based on user input

[-] PTD Outstanding Commitments	Fund Reservation/Parked	PO Commitment	Labor Commitment
	\$	\$	\$
127,519.32	1,000.00	0.00	126,519.32
127,519.32	1,000.00	0.00	126,519.32

Training & Go-Live

There were 4 webinars (webinars are recorded to 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

