

QUICK REFERENCE GUIDE

September 1, 2019

Grants Management WorkCenter

WorkCenters provide a centralized place where you can access frequently used pages, queries, processes, and reports. Options that you see in the WorkCenter depend on your security roles. You may see more or fewer options than shown in this guide.

The following Grants Management WorkCenter sections are covered in this guide:

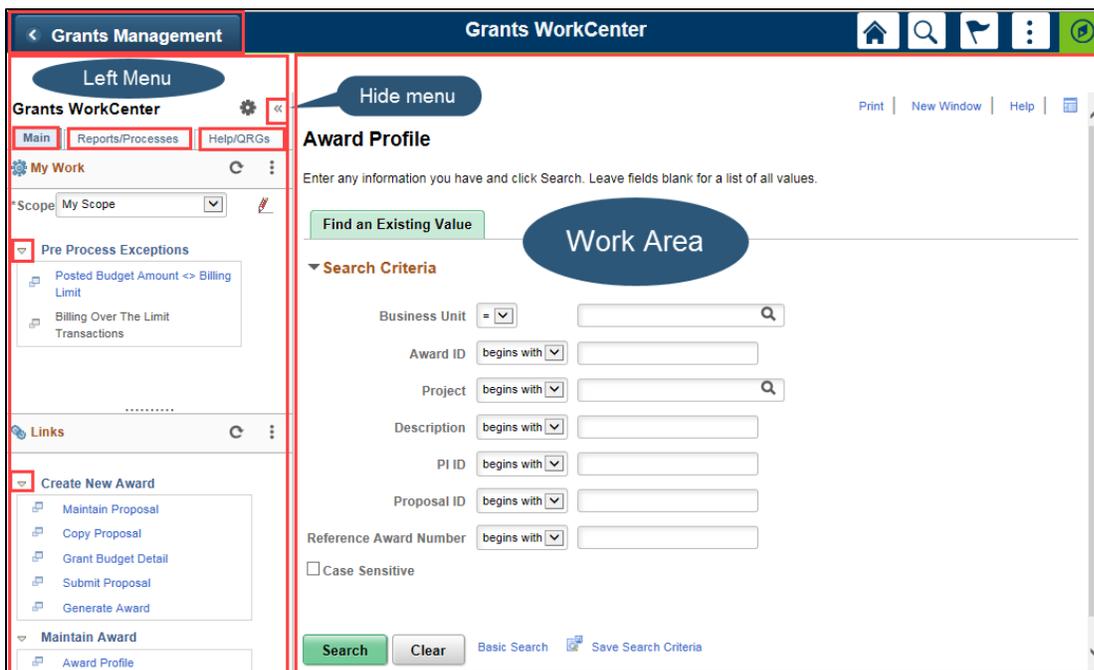
- **My Work** – View Exceptions
- **Links** -- Access Frequently Used pages
- **Reports/Processes** -- Run Reports, Processes or Queries
- **Help/QRGs** -- View Quick Reference Guides and Help Desk Contact Information

Access the Grants Management WorkCenter

1. Navigate to the Grants Management WorkCenter as described below.

Navigation Option	Navigation Path
Grants WorkCenter	Accounting, Grants Management, Grants WorkCenter.

The Grants WorkCenter displays with the *Award Profile* page opened in the **Work Area** by default (right side page).



- The left menu includes the **Main**, **Reports/Processes**, and **Help/QRGs** tabs.
- Click on the **Expand/Collapse** (☷) drop-down arrow to hide or see options in the **Left Menu**.
- Click on the **Hide Menu** (☰) double-arrow in the header of the menu to hide the **Left Menu**.

My Work – View Exceptions

The **My Work** section on the **Main** tab includes the **Pre Process Exceptions** inquiries described below. If the inquiry name is greyed out, no exceptions were found.

My Works Inquiry	Description
Posted Budget Amount <> Billing Limit	Provides a listing of active grants and shows exceptions where the “Posted Budget Amount” of an award does not equal the billing limit for the post award contract.
Billing Over The Limit Transactions	Lists grant transactions that are over the contract limit (Analysis Type: “OLT”).

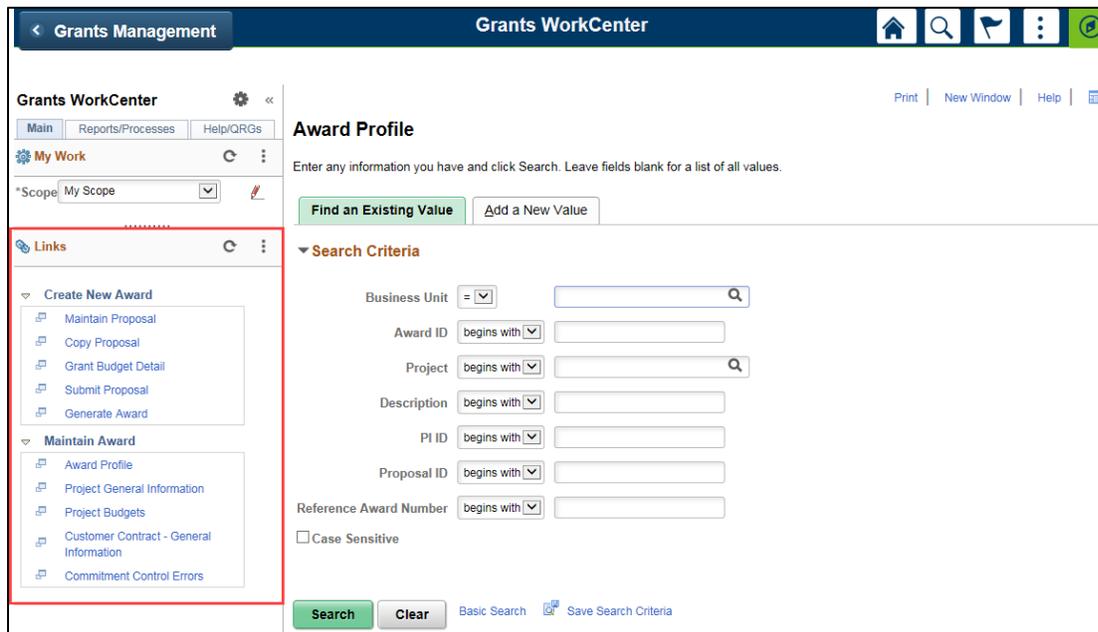
- When you select an inquiry, information is displayed on the **General** and **Detail** tabs.
- Click on the **Show All Columns** (≡) icon to see all of the fields.
- Use the **Arrows** or **View All** link on the right side to scroll through the rows of data.



Links -- Access Frequently Used pages

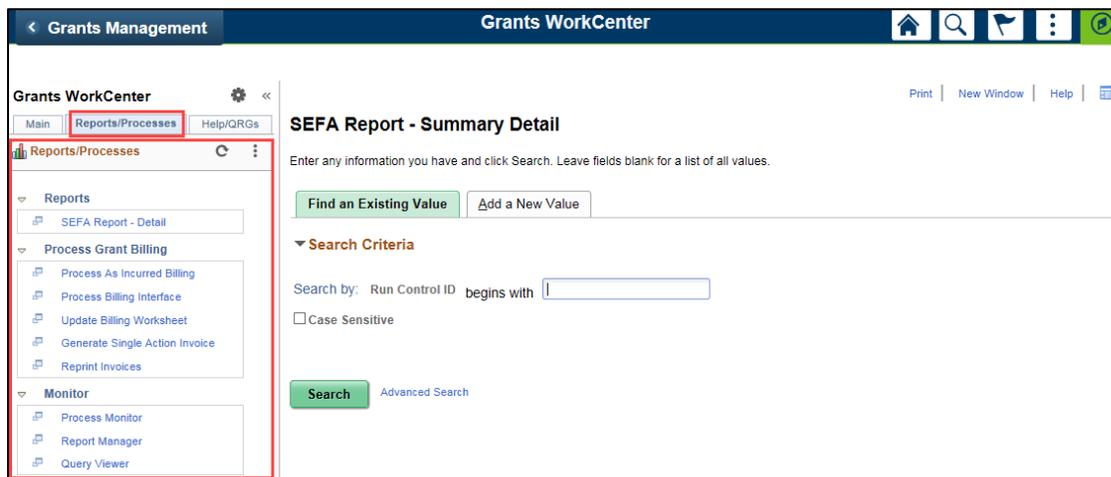
The **Links** section includes links to frequently used pages. Expand the folders listed below to access the pages:

- **Create New Award:** Maintain Proposal, Copy Proposal, Grant Budget Detail, Submit Proposal, and Generate Award pages.
- **Maintain Award:** Award Profile, Project General Information, Project Budgets, Customer Contract—General Information, and Commitment Control Errors.



Reports/Processes – Run Reports, Processes or Queries

The Reports/Processes tab includes reports, processes, or queries for grants.

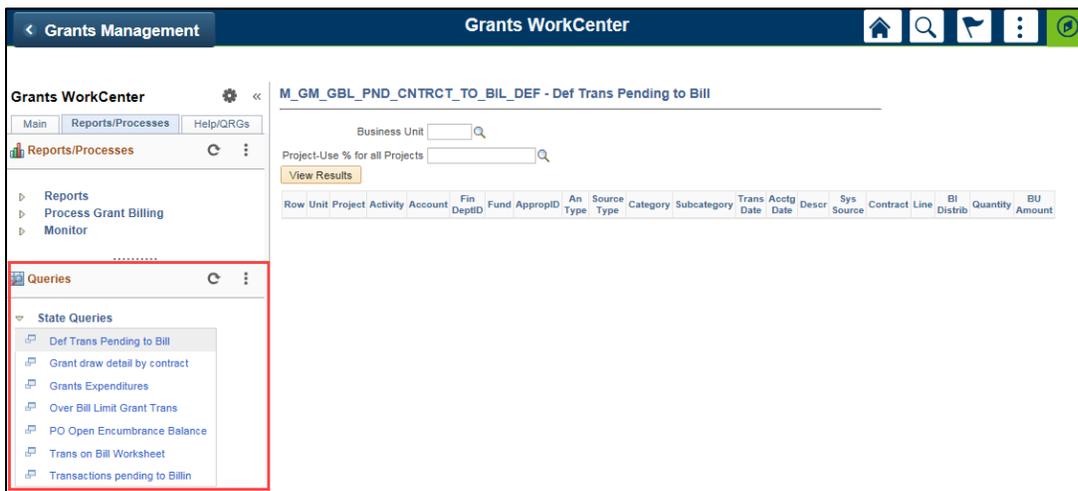


- The Reports/Processes section includes the following options:

Reports/Processes Section	Description
Reports	Run the “Schedule of Expenditures of Federal Awards (SEFA) report. Refer to the “Run SWIFT SEFA Report” guide for instructions.
Process Grant Billing	For use by agencies that process grant bills for reimbursement only. Refer to the “Process Grant Bills for Reimbursement” guide for instructions.

Reports/Processes Section	Description
Monitor	Access the Process Monitor, Report Manager, and Query Viewer.

- The **Queries** section includes links to queries related to grant processing.
 - When you select a query, the parameter page displays on the right where you can enter parameters and run the query.
 - You can also access the *Query Viewer* page to run your favorite queries or search for any available query. The page is available in the **Monitor** folder under the **Reports/Processes** section.



Help/QRGs -- View Quick Reference Guides and Help Desk Contact Information

The **Help/QRGs** tab provides access to Quick Reference Guides (QRGs) and SWIFT Help Desk contact information on the **Left Menu**.

- When you click on a QRG, the pdf displays in a new window.

