

Spreadsheet Definition & Instructions

One of the primary purposes of the Grant Master upload spreadsheet is to document the customary administrative requirements for each grant. It will be used to collect specific information about the grant such as the grant type (competitive, entitlement, etc.), effective dates of the grant, amount of the grant, CFDA number if applicable and certain billing rules along with other information in order to set the grant up in SAP Grants Management.

Below are requirements that must be followed when completing the Grant Master Mapping Spreadsheet:

1. Enter a line #. Assign each grant an individual line number.
2. Enter a grant #. Assign each grant an unique grant number according to the grant number convention discussed in the AIG chapter.
3. Enter the grant type. Use the following symbols to signify the appropriate grant type:
 - O - Other/Private Grant
 - P - U.S. Federal Pass through (used for GTR only)
 - U – U.S. Federal Government Grant
4. Enter the assigned customer/sponsor number from your customer/sponsor master data spreadsheet. The grant sponsor is the business partner (awarding agency) that will be linked to the Accounts Receivable (AR) Module in order to run the billing functionality.
5. Enter the award type for the grant. Use the following classifications for each grant. Note that a grant may be classified with multiple types, but only one type can be entered in the master record for each grant.
 - A – Formula Grants
 - B – Project Grants
 - C – Direct Payments for Specified Use
 - D – Direct Payments with Unrestricted Use
 - H – Sale, Exchange, or Donation of Property and Goods
 - J – Provision of Specialized Services
 - K – Advisory Services and Counseling
 - L – Dissemination of Technical Information
 - M – Training
 - N – Investigation of Complaints
 - _____ (if not listed above)
6. Enter the name of the grant. Enter the full name of the grant.
7. Enter a brief description of the purpose of the grant award. Give enough detail in order for someone not familiar with the grant to have a high level understanding of the functions of the grant.
8. Enter the grant value. Enter the total amount of the grant award for the entire funding period of the grant.
9. Enter the valid from date. The effective date of the grant award. Postings of revenues and expenditures cannot occur outside these ranges.
10. Enter the valid to date. The ending date of the grant award. Postings of revenues and expenditures cannot occur outside these ranges.
11. Enter the external reference. The field is to be used for the sponsor's assigned grant number.
12. Enter the CFDA number. If a federal program, enter the appropriate CFDA number.
13. Enter an internal reference. This is a free field to enter matching sources, in-kind match, contract numbers used for match, etc.

NOTE: Double click in the Word document to scroll down the instructions.

