

How Click Grants Unit Data Points Impact Reporting and Oracle Access

Key Points:

- *Submitting Department will be the “lead unit” for the proposal; it will be the unit used in summary proposal data reports and the unit used when setting up a new sponsored award in the Oracle business system
- *Submitting Department unit should always be included in the credit distribution section
- *Units receiving Financial Credit are loaded into Oracle; these units will receive “split” proposal and expenditure credit for the project

Click Grants Submitting Department

There are two significant unit data point decisions in the Click Grants module that impact data reporting and post-award account access and credit. The first is the **Submitting Department** in the Funding Proposal smart form question on the Research Department Determination page. Generally, the Submitting Department will be the “home” department of the PI, though there may be some instances when it is more appropriate to select a unit other than the PI’s home unit, for example, a Center or Institute that the PI is affiliated with. The Submitting Department is important because, when a proposal has been awarded, the Submitting Department will be the UB Organization entity under which the Award, Project, and Task will be set up in Oracle; this determines who, other than the PI, has view access to the account. Additionally, for reporting purposes, the Submitting Department will be viewed as the “lead unit” in non-split summary Proposal reporting and will be tallied as a proposal for that unit regardless of what the credit distribution is.



The screenshot shows a form titled "Research Department Determination". It contains three main sections:

- 1.0 * Select the Submitting Department:** A dropdown menu with a search icon (three dots) on the right.
- 2.0 Sponsored Research Location (Institution):** A text field containing "030 University at Buffalo".
- Sponsored Programs Office (SPO):** A text field containing "030 Sponsored Projects Services".

Click Grants Credit Distribution

The second important data point decision is in the **Credit Distribution** section. Here, the decision is made regarding how Proposal credit will be split among the PI and any co-Pis, and for each individual investigator, what UB unit(s) should receive their Financial and Recognition credit. These decisions impact **access** to any subsequent Oracle account and **credit assigned** to a person/unit for the project.

- **Proposal Credit:** Percentage credit that represents the distribution of each person’s overall responsibility for the successful performance of the project.
- **Financial Credit:** For each individual, this represents the percentage credit attributed to each unit for split proposal, award, and research expenditure reporting. The financial credit is used to attribute research expenditure credit for internal and external reporting, and impacts department and school ranking in national/international surveys, and how UB allocates resources back to the unit.
- **Recognition Credit:** For each individual this represents the percentage credit to a unit to recognize and publicly acknowledge that unit’s intellectual and/or resource contribution to the proposal and/or the project, if funded. Unlike financial credit, there is no direct financial impact for recognition credit. Recognition credit is important for recognizing university-wide centers and institutes, for example that do not benefit from financial credit attribution

“split” credit percentage for that project (see below screen shot based on the Click Credit Distribution screen shot from the previous page). For example, for every \$100 in expenditures for this project, Medicine will be credited with \$37.50, Family Medicine with \$12.50, and School of Nursing with \$50.00 in expenditures. The sum of all expenditure splits from all active awards for each unit will be the reported expenditure amount for that unit.

