



Principal Investigator SAP Grant Budgeting Overview





- **Welcome**
- **SAP Overview**
- **Budgeting**
- **Availability Controls**
- **Tools for the Investigator**
- **Discussion**



SAP Overview



What is the IRIS Project?



A critical UK initiative to replace multiple current systems that are outdated in order to streamline and enhance core business processes:

- One of the top strategic initiatives for the University
- Designed to position UK for growth
- Will establish a solid system foundation to support on-going initiatives
- Allow employees to focus on using rather than creating information

SAP is the software platform for this initiative:

- SAP is a leading enterprise-wide application to manage the administrative aspects of an organization
- SAP is engaged as our business implementation partner

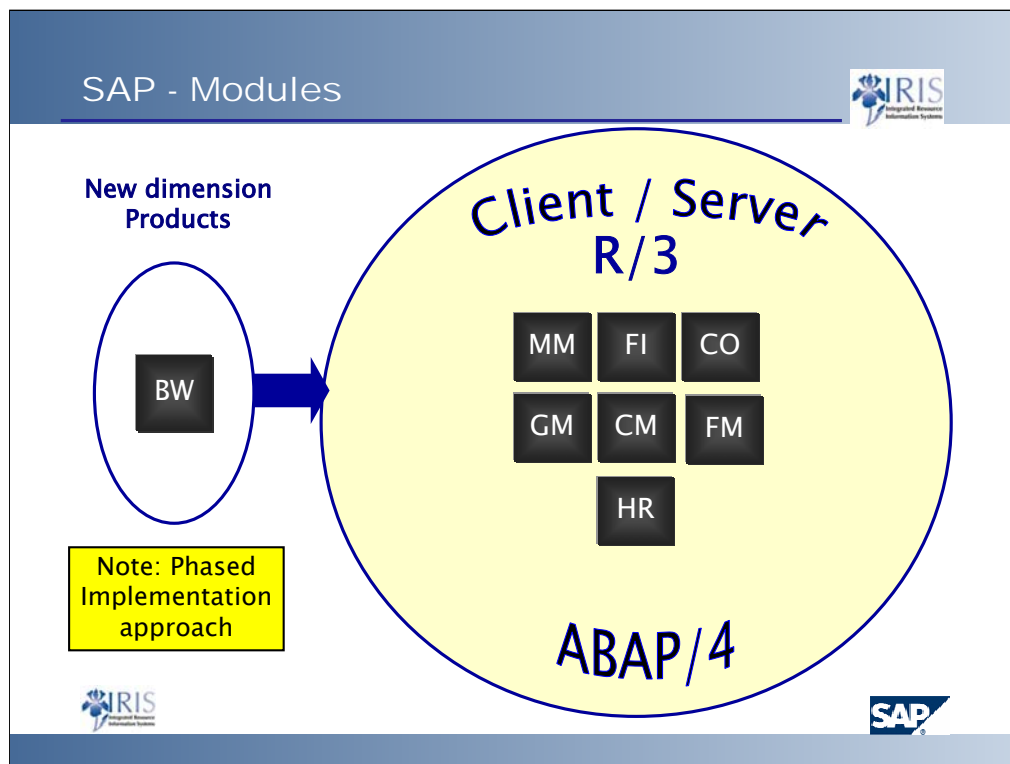


- IRIS = Integrated Resource Information Systems
- As part of the IRIS project, UK looked at key business processes and designed “IRIS Business Processes”—which streamlined some processes; eliminated unneeded processes or steps; and added some processes to improve business
- **Other Business Implementation Partners** – U of Cincinnati is using IBM, and Northern KY U is using Cyber
- **Mission Statement:** “To replace the current administrative systems with an integrated information technology solution to improve business and service processes.”

From ERP to SAP to IRIS



- The SAP R/3 system represents many of the integrated modules that SAP offers.
- R/3 = refers to the SAP application providing real-time access to information using a three-tier system architecture. The three components of this architecture are the information database, the transaction application server, and the user desktop.
- The IRIS system, based on business re-engineering is a UK flavored SAP system
- The IRIS Project Team spent much of their time in “configuration” which allows companies to set their “business rules” to address UK specific requirements
- Example: UK uses workflow in their Req. (Requisition) to Check process for approvals within the IRIS system, another company may choose not to use that functionality and create approvals in the Req. to Check process outside of the SAP system



- **R/3** = refers to the SAP application providing real-time access to information using a three-tier system architecture. The three components of this architecture are the information database, the transaction application server, and the user desktop.
- **ABAP/4** = Advanced Business Application Programming, SAP's 4th generation programming lang.
- **BW** = Business Warehouse or Business Intelligence – Reporting tool
- **MM** = Materials Management. MM contains both the purchasing functionality and Inventory Management
- **FI** = Financial Accounting. FI is external, statutory reporting. It includes Accounts Receivable, Accounts Payable, General Ledger and Special General Ledger. **It is the backbone of everything else, which is why it is going live first.**
- **CO** = Controlling. Controlling includes, Cost Center Accounting and Internal Orders.
- **GM** = Grants Management (a piece of finance)
- **FM** = Funds Management (a piece of finance)
- **CM** = Campus Management: Contract (student) Accounting, Visitor's Center, and Event Planning
- **HR** = Human Resources includes Payroll

IRIS Access Information

Must have AD/MC id

- Call 7-1300 to establish one

Must have software:

- Look for IRIS Icon on desktop
- Call 7-1300 for assistance with loading software

Must have signed Statement of Responsibility

<http://myhelp.uky.edu/SOR/>





Features





Welcome to myUK.


Use your Active Directory User ID (Exchange e-mail ID) to log on to this portal.

It is not required to use the domain before the username (i.e. ad\ or mc\).

User ID *

Password *

UK University of Kentucky



Main Building



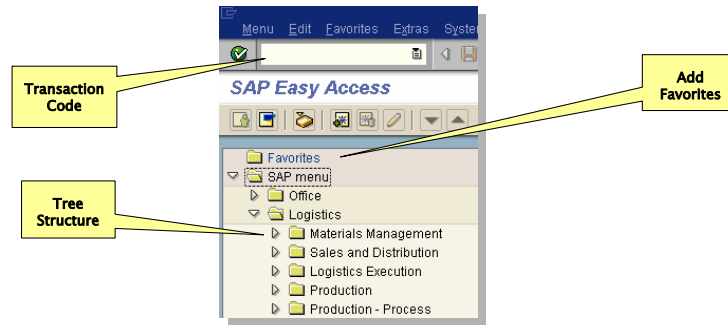
SAP Easy Access Menu



Once the login is complete, the SAP Easy Access menu appears

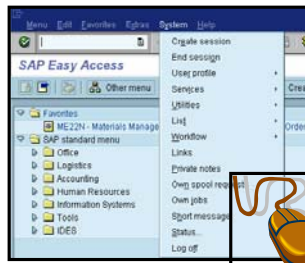
Navigate through SAP using a tree structure similar to Explorer or through transaction codes

Create a Favorites list of commonly used transactions



- With single sign-on, everyone will see the same menu [this will help the Customer Support folks when helping end-users]
- Once you have drilled-down to the desired screen, before you leave the SAP Easy Access screen, click on the Favorites button. This screen will be added to a folder named Favorites. The next time you need to access that screen, simply click on the Favorites folder and choose the appropriate transaction.

3 Ways to Select System Functions



OR



Use the mouse to display a menu

Use keystrokes



Type the transaction code [T-code] in the **Command** field

NOTE: Click this triangle button to collapse the **Command** field.



- When in a menu path (not in a transaction code) you can enter the transaction code to proceed directly to that program: ME21N
- If you are in a program you must enter a /n before the transaction code to exit the current program you are in and proceed to the desired transaction code. For example, if you are processing vendor invoices in MIRO and wish to proceed to creating a purchase order, ME21N, you must enter /NME21N.
- To search for a transaction code that cannot be located, enter the transaction code: search_sap_menu in the command field. Enter the desired search criteria and view the results.

Field Level Help – The F1 Key

Click in a field and press the **F1** key on the keyboard.

The **Description**, **Use**, and **Procedure** sections appear for that field.

The screenshot shows the SAP 'Display Purchase Order' interface. A red box highlights the 'Terms of payment key' field in the 'Payment terms' section. A help popup window is open over this field, containing the following text:

Terms of payment key

Key for defining payment terms composed of cash discount percentages and payment periods.

Use

It is used in sales orders, purchase orders, and invoices. Terms of payment provide information for:

- Cash management
- Dunning procedures
- Payment transactions

Procedure

Data can be entered in the field for the terms of payment key in various ways as you enter a business transaction:

- In most business transactions, the system defaults the key specified in the master record of the customer/vendor in question.
- In some transactions (for example, credit memos), however, the system does not default the key from the master record. Despite this, you can use the key from the customer/vendor master record by entering "" in the field.

- To drill-down inside a help menu, click on a highlighted word (usually seen in a different color than the regular text).

Two areas in which you can access UK specific help:

- **From the SAP transactions**
 - ◆ Simulations
 - ◆ Work instructions
 - ◆ Cue cards
 - ◆ Quick reference cards
- **Go to the UK help website**
 - ◆ <http://myhelp.uky.edu/rwd/nav/content.htm>

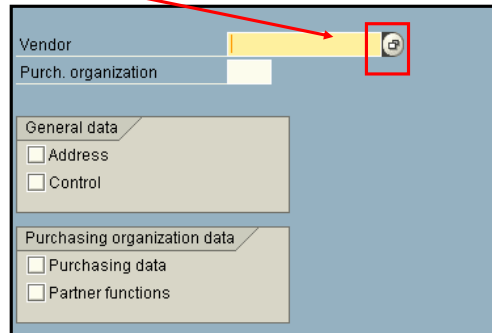


- Other help that will be available:
 - Simulations, work instructions, cue cards, glossary, manual, etc.
- UK-Specific help will be available in the production system

Help - F4 Possible Entries - the F4 Key

Click in a field that has the **Possible Entries** button.

For example, if you do not know the vendor number, place the cursor in the **Vendor** field and press the **F4** key or click the **Possible Entries** button to the right of the field name.



The screenshot shows a portion of an SAP form. At the top, there are two input fields: 'Vendor' and 'Purch. organization'. The 'Vendor' field is highlighted in yellow, and a red arrow points from a yellow text box to a small square button with a magnifying glass icon located to its right. This button is also enclosed in a red square. Below the input fields, there are two sections of data: 'General data' with checkboxes for 'Address' and 'Control', and 'Purchasing organization data' with checkboxes for 'Purchasing data' and 'Partner functions'.



- The Possible Entries pushbutton allows the user to view and access all input values for that field.

Budgeting





- **G/L Account** – code that identifies the specific expenditure; previously referred to as an object code
- **WBS Element/Grant** – the unique number for each grant, the account number



- **Sponsored Class** – a grouping of expenses used by for invoices and financial reports; may have one or more g/l accounts
- **BUDGETED Sponsored Class** - Sponsored classes track to a set of budget categories
- **Budget Rule** – identifies the template of budgeted sponsored classes used to meet the requirements of different sponsors; there are three templates for grants



BudRule 9

- **Primarily used for industry funded fixed-price awards**

E500000 – Direct Expenses

E590020 – F&A costs





BudRule 5

■ Typical for state agency and foundation sponsors

E510000 – All Salary & Benefits

E530010 – Travel – All

E530130 – Consultants

E530170 – Train Participants

E530200 – Sub-contract \leq \$25K

E530201 – Sub-contract $>$ \$25K

E530300 – Direct Current Expenses

E550000 – Equipment

E590020 – F&A costs





BudRule 4

- Used for all federal awards, including flow through

E511000 - Direct Salaries & Benefits

E513000 - Student Salaries & Benefits

E530011 - Travel - Domestic

E530033 - Travel – Foreign

E530040 - Travel – Student

E530130 – Consultants

E530170 - Train Participants

E530200 - Sub-contract \leq \$25K

E530201 - Sub-contract $>$ \$25K





Budrule 4 Continued

E530300–Direct Current Expense

E534040- Rent/Lease Land/Eqp

E534041-Rent/Lease – Bldg

E536120-Patient Care & Support

E537010 – Fellow/Trainee Stipend

E537030 – Trainee Tuition/Fees

E550000 – Equipment

E590020 – F&A Costs





BudRule 4

Examples of normally indirect (CAS) items possible with approval:

E512030 – Secr/Cler Sal & Ben

E540334 – Office Supplies

E530402 – Postage

E531199 – CAS Communication which includes:

- Work Orders
- Cell Phone
- Internet
- Voice Mail
- Answering Services
- Pager Services



Budrule Crosswalk

Examples

A	B	C	D	E	F	G	H
Budgeted Sponsored Class for Budget Rule 4	Budgeted Sponsored Class for Budget Rule 5	Budgeted Sponsored Class for Budget Rule 9	Sponsored Class	Sponsored Class Description	Direct Expense allowed on grant	G/L Accounts	G/L Account Des
E530130	E530130	E500000	E530130	Consultants	*	530130	Consult-Sponsor Prog

A	B	C	D	E	F	G	H
Budgeted Sponsored Class for Budget Rule 4	Budgeted Sponsored Class for Budget Rule 5	Budgeted Sponsored Class for Budget Rule 9	Sponsored Class	Sponsored Class Description	Direct Expense allowed on grant	G/L Accounts	G/L Account Des
88 E530300	E530300	E500000	E530400	Materials & Supplies	*	540311	Chemicals&Lab Supply

A	B	C	D	E	F	G	H
Budgeted Sponsored Class for Budget Rule 4	Budgeted Sponsored Class for Budget Rule 5	Budgeted Sponsored Class for Budget Rule 9	Sponsored Class	Sponsored Class Description	Direct Expense allowed on grant	G/L Accounts	G/L Account Des
301 E530040	E530010	E500000	E530040	Travel-Student		530040	Travel - Student



Federal Proposal Budget that includes CAS items

DETAILED BUDGET FOR INITIAL BUDGET PERIOD DIRECT COSTS ONLY					FROM 1/1/06	THROUGH 12/31/06	
<i>PERSONNEL (Applicant organization only)</i>		TYPE APPT. <i>(months)</i>	% EFFORT ON PROJ.	INST. BASE SALARY	<i>DOLLAR AMOUNT REQUESTED (omit cents)</i>		
NAME	ROLE ON PROJECT				SALARY REQUESTED	FRINGE BENEFITS	TOTAL
Dr. Smith (E511000)	Principal Investigator	12	30	100,000	30,000	7,500	37,500
Post Doc (E513000)	Post Doc	12	50	30,000	15,000	3,750	18,750
Post Doc (E513000)	Post Doc	12	50	30,000	15,000	3,750	18,750
Grad RA (E513000)	Res. Asst	12	100	20,000	20,000	5,000	25,000
Secretary (E512030)*	Secretary	12	50	40,000	20,000	5,000	25,000
SUBTOTALS →					100,000	25,000	125,000
<i>CONSULTANT COSTS</i>							
Gerry Expert (E530130)							800
<i>EQUIPMENT (Itemize)</i>							
Computer (E550010)*							1,500

Proposal Budgeting – CAS items, cont.

SUPPLIES <i>(Itemize by category)</i> office supplies (E540334)* SAS software (E530300)		3,500
TRAVEL One foreign meeting with sponsor for PI (E530033)		4,000
PATIENT CARE COSTS	INPATIENT OUTPATIENT	
ALTERATIONS AND RENOVATIONS <i>(Itemize by category)</i>		
OTHER EXPENSES <i>(Itemize by category)</i> long distance phone calls (E530300) duplicating (E530300) postage (E530402)*		2,200
CONSORTIUM/CONTRACTUAL COSTS	DIRECT COSTS	
SUBTOTAL DIRECT COSTS FOR INITIAL BUDGET PERIOD <i>(Item 7a, Face Page)</i>		\$ 137,000
CONSORTIUM/CONTRACTUAL COSTS	FACILITIES AND ADMINISTRATIVE COSTS	
TOTAL DIRECT COSTS FOR INITIAL BUDGET PERIOD		\$ 137,000

Proposal Budgeting – Sample CAS justification

* **Secretary** – Due to the nature of this program project, extensive administrative coordination will be required. This is consistent with Project Aim #2. There will be monthly meetings held to share data collected from each program site (approximately 35 sites) which requires collecting the information, developing training materials and arranging for meeting facilities, travel and other associated costs.

* **Computer** – a computer will be 100% dedicated to this project to collect and store data from each program site. A new statistical software is being developed to run the analysis of this data. The technical software will require extensive memory and time to process the information making it necessary to dedicate a computer for this project.

* **Office Supplies** – items such as binders, envelopes, glossy paper inserts and tab dividers will be needed to prepare the training packets for each program site.

* **Postage** – self-addressed envelopes will be given to the sites to return data collected from respondents in their area.

*These costs are normally treated as an indirect cost at the University of Kentucky. However, due to the requirements of this project, university policy allows this cost to be requested and justified as a direct cost.





What is Availability Control (AVC)?

Availability Control is a mechanism within SAP that ensures compliance with grant budgeting policies within the system.

- **Creates pro-active management of budgets to limit under-utilization of external funding**
- **Ensures compliance with OMB circulars for federal and federal flow-thru projects**



➤ CAS Report example of extrapolation:

- Monthly FRS CAS report averaged **\$992,000** per month
- Federal F&A rate for 2004-2005 = 47.3%
- $992,000 * 1.473 = \underline{\underline{\$1,461,216}}$



How it works

Sponsored Classes excluded

- All Payroll & Benefits sponsored classes (including fellowship)
- Pro-card default
- F&A costs
- Revenue

Will only stop payroll, pro-card or F&A costs if the entire grant is over budget or grant is ended.





Tools you can use:

IRIS Production: GMAVCOVRW – Use the variant /UKDefault

- ❖ This shows the budget by Budgeted sponsored classes and thunderbolts if the item is over-budget

BW Web Reporting: Grant Ledgers

- ❖ Three options for PI ledgers – Summary, Sponsored Class Detail or GL Account Detail

BudRule Crosswalk – available on the following web sites

<http://www.research.uky.edu/ospa/>

<http://www.uky.edu/EVPFA/Controller/spahome/>

<http://www.uky.edu/IRIS/Financials>

- ❖ GL Accounts from FRS object codes are also available on this site



Lookup:

Current budget dates on project; General data

General Data	Address	Responsibilities	Reference	Posting	Budget
Basic Data					
Grant Type	<input type="text" value="C0"/>	Contract			
Company Code	<input type="text" value="UK00"/>	University of Kentucky			
Sponsor	<input type="text" value="1000200003"/>	KY Transportation Cabinet Marcie Mathews			
Authorization Group	<input type="text"/>				
Award Type	<input type="text"/>				
Project Period					
Project From Date	<input type="text" value="07/01/2005"/>				
Project To Date	<input type="text" value="06/30/2006"/>				



Budrule assigned; Award tab

Supported Objects Overhead Costs F & A Billing Payment Reporting Cost Share Award




Account Info

Budget Rule 5 Sponsor restricted

Responsibilities such as RA, FA, etc; Responsibilities tab

General Data Address Responsibilities Reference Posting Budget Din

Responsibilities

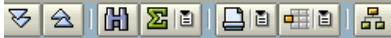
Res...	Description	Type	Object type	ID	Name
FA	Financial Administrator - SPA	US	User	ALSMITH	 Amy Smither
FO	Fiscal Officer - College	US	User	MCBEATH	 Mary E McBeath
RA	Research Administrator - OS	US	User	RDAZBI1	 David Azbill



IRIS Production - GMAVCOVRW

GM AVC Overview Report for Ledger 9K

Grant 00000000003046741100
Fund All Values
Sponsored Program All Values
Sponsored Class Multiple Values
Time Interval Overall Time Period



Grant/Fund/Sp. Prog./Sp. Class	Consumable Bdgt	Consumed Amt.	Available Amt.	Deficit Ind.
00000000003046741100	195,698.00	152,710.19	42,987.81	
0226741100	195,698.00	152,710.19	42,987.81	
Overall Programs	195,698.00	152,710.19	42,987.81	
E511000	3,500.00	2,211.13	1,288.87	
E512000	0.00	776.96	776.96-	⚠
E512010	19,093.00	12,181.57	6,911.43	
E530011	12,832.00	11,351.48	1,480.52	
E530130	1,800.00	1,800.00	0.00	
E530170	8,502.00	8,501.50	0.50	
E530300	7,227.00	3,621.46	3,605.54	
E530999	0.00	517.36	517.36-	⚠
E535201	111,344.00	80,000.00	31,344.00	
E550010	31,400.00	31,748.73	348.73-	⚠



BW - Grant Ledgers



User Favorites and Roles

Welcome
Jennifer A Miles



- ▶ Favorites
- ▼ End User Composite Role for InfoArea Finance - Ledger Reports
 - ▼ Role BWP-REPORTS-LEDGER
 - ▶ Special Ledger
 - ▶ Funds Management / Budget Control
 - ▼ Grants Management
 - ▶ Grant Ledger
 - ▶ Grant Ledger- PI GL Account Detail
 - ▶ Grant Ledger- PI Sponsored Class Detail
 - ▶ Grant Ledger- PI Summary
 - ▶ Grant Line Item Detail
 - ▶ Grant Budget Item Details
 - ▶ Internal Orders
 - ▶ GASB Financial Statements
 - ▶ POWERUSER Composite Role for InfoArea FINANCE



PI Ledger - Summary

Grant	GM project from date	GM project to date	UnReleased Budget	Released Budget	Revenue & Expenditure	Cumulative Revenue & Expenditure	Encumbrances from GM & Requisitions	Encumbrances for PO	FI Parked Doc	Available Released Budget	% Available Released Budget
▼ 3046741100 HUMAN SUBJECTS RESEA	09/30/2003	09/29/2006		\$ 195,698.00		\$ 185,657.91				\$ 10,040.09	5.13040 %
▶ Direct Salary & Bene				\$ 3,500.00		\$ 2,278.21				\$ 1,221.79	34.90829 %
▶ Staff Salary-Temp/Pa						\$ 776.96				\$ (776.96)	X
▶ Exec/Mgrl/Admin Sal				\$ 19,093.00		\$ 13,718.21				\$ 5,374.79	28.15058 %
▶ Travel-Domestic				\$ 12,832.00		\$ 11,351.48				\$ 1,480.52	11.53772 %
▶ Consultants				\$ 1,800.00		\$ 1,800.00				\$ 0.00	0.00000 %
▶ Train Participants				\$ 8,502.00		\$ 8,501.50				\$ 0.50	0.00588 %
▶ Direct Current Expen				\$ 6,878.00		\$ 3,621.46				\$ 3,256.54	47.34719 %
▶ CAS Materials & Supp						\$ 517.36				\$ (517.36)	X
▶ Compu-License Fee-S/W				\$ 111,344.00		\$ 111,344.00				\$ 0.00	0.00000 %
▶ Computing Hardware				\$ 31,749.00		\$ 31,748.73				\$ 0.27	0.00085 %



Grant PI Ledger – PI Sponsored Class Detail

Grant	GM project from date	GM project to date	UnReleased Budget	Released Budget	Revenue & Expenditure	Cumulative Revenue & Expenditure	Encumbrances from GM & Requisitions	Encumbrances for PO	FI Parked Doc	Available Released Budget	% Available Released Budget
Direct Salary & Bene				\$ 3,500.00		\$ 2,278.21				\$ 1,221.79	34.90829 %
▶ E511000 Direct Salary & Bene				\$ 3,500.00						\$ 3,500.00	100.00000 %
▶ E512041 TechnicalParaprof S						\$ 683.63				\$ (683.63)	X
▶ E522000 Staff Benefits						\$ 1,594.58				\$ (1,594.58)	X
Staff Salary-TempPa						\$ 776.96				\$ (776.96)	X
▶ E512000 Staff Salary-TempPa						\$ 776.96				\$ (776.96)	X
Exec/Mgr/Admin Sal				\$ 19,093.00		\$ 13,718.21				\$ 5,374.79	28.15058 %
▶ E512010 Exec/Mgr/Admin Sal				\$ 19,093.00						\$ 19,093.00	100.00000 %
▶ E512011 Exec/Mgr/Admin Sala						\$ 13,609.01				\$ (13,609.01)	X
▶ E522011 Exec/Mgr/Admin Bene						\$ 109.20				\$ (109.20)	X
Travel-Domestic				\$ 12,832.00		\$ 11,351.48				\$ 1,480.52	11.53772 %
▶ E530011 Travel-Domestic				\$ 12,832.00		\$ 11,351.48				\$ 1,480.52	11.53772 %
Consultants				\$ 1,800.00		\$ 1,800.00				\$ 0.00	0.00000 %
▶ E530130 Consultants				\$ 1,800.00		\$ 1,800.00				\$ 0.00	0.00000 %
Train Participants				\$ 8,502.00		\$ 8,501.50				\$ 0.50	0.00588 %
▶ E530170 Train Participants				\$ 8,502.00		\$ 8,501.50				\$ 0.50	0.00588 %
Direct Current Expen				\$ 6,878.00		\$ 3,621.46				\$ 3,256.54	47.34719 %
▶ E530300 Direct Current Expen				\$ 6,878.00						\$ 6,878.00	100.00000 %
▶ E530400 Materials & Supplies						\$ 3,621.46				\$ (3,621.46)	X
CAS Materials & Supp						\$ 517.36				\$ (517.36)	X
▶ E530999 CAS Materials & Supp						\$ 517.36				\$ (517.36)	X
Compu-License Fee-S/W				\$ 111,344.00		\$ 111,344.00				\$ 0.00	0.00000 %
▶ E535201 Compu-License Fee-S/W				\$ 111,344.00		\$ 111,344.00				\$ 0.00	0.00000 %
Computing Hardware				\$ 31,749.00		\$ 31,748.73				\$ 0.27	0.00085 %
▶ E550010 Computing Hardware				\$ 31,749.00		\$ 31,748.73				\$ 0.27	0.00085 %



PI Summary - GL Account Detail

Grant		GM project from date	GM project to date	UnReleased Budget	Released Budget	Revenue & Expenditure	Cumulative Revenue & Expenditure	Encumbrances from GM & Requisitions	Encumbrances for PO	FI Parked Doc	Available Released Budget	% Available Released Budget
▼ 3046741100	HUMAN SUBJECTS RESEA	09/30/2003	09/29/2006		\$ 195,698.00		\$ 185,657.91				\$ 10,040.09	5.13040 %
▼	Direct Salary & Bene				\$ 3,500.00		\$ 2,278.21				\$ 1,221.79	34.90829 %
▼ E511000	Direct Salary & Bene				\$ 3,500.00						\$ 3,500.00	100.00000 %
#	UK00/Not assigned				\$ 3,500.00						\$ 3,500.00	100.00000 %
▼ E512041	Technical/Paraprof S						\$ 683.63				\$ (683.63)	X
0000619006	STEPS Tech/Paraprof						\$ 683.63				\$ (683.63)	X
▼ E522000	Staff Benefits						\$ 1,594.58				\$ (1,594.58)	X
0000520015	FICA						\$ 956.10				\$ (956.10)	X
0000520720	MFB - Staff						\$ 638.48				\$ (638.48)	X
▼	Staff Salary-Temp/Pa						\$ 776.96				\$ (776.96)	X
▼ E512000	Staff Salary-Temp/Pa						\$ 776.96				\$ (776.96)	X
0000512071	Prof Nonadmi-Regular						\$ 776.96				\$ (776.96)	X
▼	Exec/Mgrl/Admin Sal				\$ 19,093.00		\$ 13,718.21				\$ 5,374.79	28.15058 %
▼ E512010	Exec/Mgrl/Admin Sal				\$ 19,093.00						\$ 19,093.00	100.00000 %
#	UK00/Not assigned				\$ 19,093.00						\$ 19,093.00	100.00000 %
▼ E512011	Exec/Mgrl/Admin Sala						\$ 13,609.01				\$ (13,609.01)	X
0000512212	Temp Prof Admini						\$ 13,609.01				\$ (13,609.01)	X
▼ E522011	Exec/Mgrl/Admin Bene						\$ 109.20				\$ (109.20)	X
0000520404	FICA-Prof Admin						\$ 109.20				\$ (109.20)	X
▼	Travel-Domestic				\$ 12,832.00		\$ 11,351.48				\$ 1,480.52	11.53772 %
▼ E530011	Travel-Domestic				\$ 12,832.00		\$ 11,351.48				\$ 1,480.52	11.53772 %
#	UK00/Not assigned				\$ 12,832.00						\$ 12,832.00	100.00000 %
0000530011	Travel-In-State Meal						\$ 348.63				\$ (348.63)	X
0000530021	Travel-OS Meals						\$ 11,002.85				\$ (11,002.85)	X
▼	Consultants				\$ 1,800.00		\$ 1,800.00				\$ 0.00	0.00000 %





Tools you can use, cont:

- ❖ IRIS web-site dedicated to Grants Management

<http://www.uky.edu/IRIS/GM/>

- ❖ IRIS web-site dedicated to Principal Investigators

<http://www.uky.edu/IRIS/GM/piresources.html>

- ❖ Announcement list serv for principal investigators

- ❖ Two-way discussion list serv for announcements and sharing of information





- ❖ **Policy has not changed from FRS**
- ❖ **System protects the integrity of UK by being compliant with federal and UK policies governing grants**
- ❖ **Proactively managing grant budgets is necessary**
- ❖ **Budget rules are modeled on FRS where possible**
- ❖ **Re-budgeting for converted grants may be more frequent**
- ❖ **Re-budgets are high priority in both OSPA and SPA**
- ❖ **Assistance will be provided as requested**