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Introduction

SciGrants is a Filemaker database that contains basic information about grants that are held by several departments in the Division of Science, including Biochemistry, Biology, Physics, and Psychology. It consists of 3 types of information: Agency Information, Renewal Information and Annual Information, which will be described in detail later in this document.

The main purpose of this database is to main a comprehensive list of Science grants that can be used to:

1. Generate lists of each PI's grants
2. Feed information to other databases to reduce data entry and the associated errors
3. Track the history of grants awarded over time.

General notes about our databases

- A database is only as useful as the data it contains. Thus it is of utmost important that the information is accurate, complete and kept up to date by the users.
- If a field has an arrow next to it, you can click on that arrow for a list of suggestions. If your choice isn't there, you can click on the field again and enter it yourself. If you find that you are entering a particular value over and over and it is not in the drop down, please place a request to have it added.
- Generally, fields that can be edited are in a white box, while those that cannot be edited are not.

How to connect to the database

In order to connect to SciGrants, you need to have your Department Administrator email Jessica Maryott (jmaryott@brandeis.edu) or Steven Karel (karel@brandeis.edu) giving you permission to access the records for your department. It should include your UNet ID and your level of access: read only (for reference only) or edit (for data entry)..

Once your access has been confirmed, you can add our server to your copy of Filemaker with the following steps:

1. Open Filemaker and then from the File menu, choose "Open remote"
2. Choose "Favorite Hosts" from the drop down menu next to "View".
3. If you cannot see `joker.unet.brandeis.edu` already, click "Add" at the bottom of the window and set the Host's Internet Address to `joker.unet.brandeis.edu`. Add a Favorite Host's Name if you want. Click "Save."

4. You should now be able to see a list of available file when you choose `joker.unet.brandeis.edu` from the Hosts listing. Double clicking SciGrants will open the database.
5. You will only be able to see and edit grants that are associated with your own department.

Basic Structure and Navigation

SciGrants uses a one-to-many relational design. This means that each entry (called a record) in one table can be related to many in another table, allowing you to track many pieces of related information for each grant. SciGrants contains 3 main types of information, each in their own table: Agency Information, Renewal Information and Annual Information.

Agency Information

Each grant has a single record in the Agency Information table. This is the main record for the grant and it contains the information about the grant that never changes, such as the granting institution and the original award date. Renewal and Annual records shown in the Current Info tab on the *DataEntry* layout are always the records that are relevant for today's date, even if there is a more recent entry in the database (for instance if the NGA came in a month before the current budget year ends, only the information for the current year is shown). To see these other entries (ended and incoming), look at the corresponding Historic Info tab.

Renewal Information

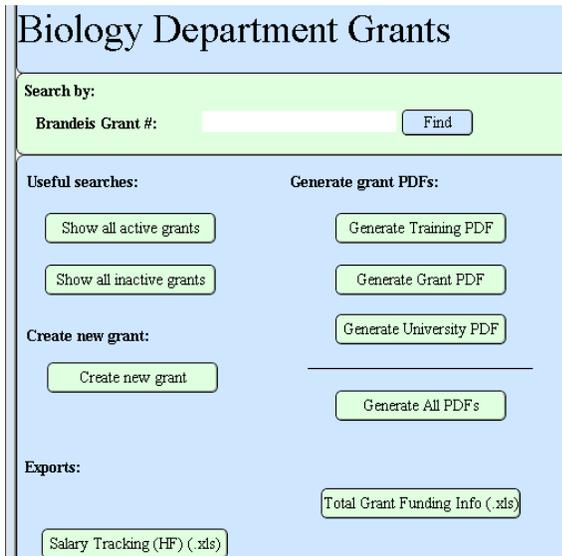
Many grants have renewal periods, generally for four years. Such grants are often renewed several times, so each grant record in the Agency Information table can have several records in the Renewal Information table. This table tracks information about the current renewal cycle and is used to create warnings when the grant is due for a competitive renewal (and all the work that entails). To see all Renewal entries for the current grant, click on the Historic Competitive Renewal Info tab.

Annual Information

Likewise, each grant has several Annual Budget periods. Because the structure allows multiple records to be associated with each grant, we can track the budget history for a grant over many years.

Starting off

When you first log in, you will be taken to the *StartHere* layout (see Figure 1)



The screenshot shows the 'Biology Department Grants' interface. At the top, there is a search section with the label 'Search by:' and a field for 'Brandeis Grant #' with a 'Find' button. Below this, there are two columns of buttons. The left column, under 'Useful searches:', contains 'Show all active grants' and 'Show all inactive grants'. Below that, under 'Create new grant:', is a 'Create new grant' button. The right column, under 'Generate grant PDFs:', contains 'Generate Training PDF', 'Generate Grant PDF', 'Generate University PDF', and 'Generate All PDFs'. At the bottom, under 'Exports:', there are two buttons: 'Salary Tracking (HF) (.xls)' and 'Total Grant Funding Info (.xls)'.

Figure 1: StartHere layout

Entering grant information

There are several different circumstances in which you will be entering or changing information in the database. It is important to follow the process for the correct action below.

Biology Department Grants

Show all active grants Create new grant
 Show all inactive grants Back to Main Page

PI: James Haber Grant Manager: AC Nickname:
 Agency #: 5R01GM076020-07 Status: Active End this grant Title:
 Brandeis #: 15 16200 40000 401716 No Cost: Yes No Eligible

Current Info Historic Annual Info Historic Competitive Renewal Info Subcontract Info

Agency Information **Annual Budget Information**

Funding Agency NIH Brandeis # 15 16200 40000 401716
 Agency Subdivision NIGMS Labs Haber
 Type Of Grant Federal Subcontract(s)? <no values defined>
 Subcategory Research grant Budget (per year): Renewal Year 3 Agency Year 7
 Project Period 08/01/2006 - 07/31/2014 Current Budget Period 08/01/2012 - 07/31/2013
 Sponsor Direct Award \$187,110.00
 URL for Instructions Indirect Award \$106,688.00
 Nickname Other Award
 Total: \$293,798.00

Competitive Renewal Information

Current Renewal Dates 08/01/2010 - 07/31/2014 Notes
 Agency Number (all grants): 076020
 NIH Codes: Type 5 Act. R01 Inst. GM Supp.
 Progress Report Due Date
 Renewal Submitted Yes No Eligible

Related Grants

Comment by:
 Made on:

Figure 2: Data Entry Layout

New grant

You should create a new grant only when you receive an NGA (notice of grant award) for a completely new grant that we have never had before (it has a new agency number) or when we get a new capital account or department line.

Note: Do NOT create a new grant when there is an NGA for a continuation year, or when the Brandeis number changes. Instead, create a new Annual Info Entry.

1. Click the green "Create new grant" button on the *StartHere* or *DataEntry* layouts (see the blue arrow in Figure 2).
2. You will be taken to another layout *NewGrantEntry*. Enter the following information about the grant (see Figure 3):
 - a. **Funding Agency** – this is the Agency that is providing the grant to the PI. There is a drop down of common entries (including Brandeis University, NIH and NSF).

- b. **Agency Division** – this is the subdivision of the Agency. This is particularly common for NIH grants and the common subdivisions of NIH appear in the drop down.
- c. **Funding Source** – this is the source of the grant, usually corresponding to the fund number at Brandeis and could be federal, non-federal or department funds, among others.
- d. **Subcategory** – this is the subcategory of the grant and could be research grants, training grants or fellowships, among others.
- e. **Sponsor** – this is for Fellowships only and should contain the name of the faculty sponsor on the Fellowship. This will be greyed out if the grant is not a Fellowship. The student is considered the PI and will be entered later.
- f. **Start Date** – the first day of the grant.
- g. **Project Title** – the title of the grant from the grant application.
- h. **Nickname** – a name that you or the PI often uses to designate the grant. This is optional, unless this is a Fellowship, in which case, this must be set to the name of the person receiving the fellowship.

Figure 3: New grant entry

- 3. Click the blue Continue button at the bottom of the fields (see).
- 4. If this is a Brandeis line (like a department chargeline or an MOU) proceed directly to Step 6. Otherwise, you will be taken to another layout *NewRenewalEntry*, where you should enter the renewal information for this grant (see Figure 3):
 - a. **Renewal Dates** – the start date for the renewal period should be already filled in to be the same as the start date of the grant itself. The end date is generally four years later, but depends on the funding agency.
 - b. **NIH Codes** – these are the codes that make up the NIH agency number.
 - i. **Type** – the number at the front of the agency number and indicates the status of the grant (see <http://grants.nih.gov/grants/glossary.htm#A27>)
 - ii. **Activity Code (Act.)** – 3 character code indicating funding mechanism (see <http://grants.nih.gov/grants/glossary.htm#A>)
 - iii. **Institute (Inst.)** – the abbreviation for the NIH funding institute (see <http://grants.nih.gov/grants/glossary.htm#I>).

- iv. **Supplement code (Supp.)** – the code indication the award is a supplement to the main grant (see <http://grants.nih.gov/grants/glossary.htm#S>).
- c. **Agency Number** - the agency number. For NIH grants, this is the 6 digit number only.
- d. **Progress Report Due Date** – the date that the progress report is due to the funding agency.

Please enter the new competitive renewal information for the grant:

Renewal Dates: -

NIH Codes: Type Act. Inst. Supp.

Agency Number: for NIH grants, only enter the 6 digit agency number

Progress Report Due Date:

Figure 4: New Renewal Entry

- 5. Click the blue Continue button at the bottom of the field entry.
- 6. Next, you will be taken to another layout *NewAnnualEntry*. Enter the following information about the grant:
 - a. **Brandeis #** – this is the full Brandeis grant number, in order: the 2 digit fund, 5 digit department ID, 5 digit program and the 6 or 9 digit project or grant number.
 - b. **Principle Investigator (PI)** – this is the PI on the grant. Some Brandeis lines do not have PIs (like department lines) and the recipients of Fellowships are considered to be the PI of their own Fellowship.
 - c. **Display with** – this is the category that the grant will appear under when the grant listing is printed. For most research grants, this will be the PI’s last name. Other possibilities appear in the drop down or autofill. **NOTE: This MUST be filled in for the grant to appear in the grant listings.**
 - d. **Grant Manager** – this is the current grant manager. Only the initials of the grant manager will appear in this field, though the drop down contains the full names.
 - e. **Groups that can use this grant** – this is the list of groups that have access to charging this grant. Each lab is a group and should be added to that PI’s research grant. For example, John Smith’s R01 should have Smith as a group. This field is very important to fill out accurately, as it is the basis for drop downs in many other databases.
 - f. **Budget year** – this contains the start date and end dates of the current budget year for this grant. The database will make a best guess as to these values, but please check them for accuracy!
 - g. **Agency year** – this is the total year of the grant. This defaults to 1 for the first year and increments by 1 thereafter.
 - h. **Direct Award** – the total direct award for the current budget year.
 - i. **Indirect Award** – the total indirect award for the current budget year.
 - j. **Other Award** – the total amount of other award for the current budget year.

- k. **Total Award** – this field is calculated for you and is the total of the 3 previous fields.
- l. **Notes** – this field is for any notes you may have about the current budget year. Notes about the grant in general belong on the *DataEntry* page (see Figure 2).

Figure 5: New Annual Entry

- 7. Click the blue Continue button at the bottom of the field entry.

New Renewal

When a grant is receives a competitive renewal, you should make a new Renewal Entry in the database using the following steps:

1. On the *DataEntry* layout, go to the Historic Competitive Renewal Info tab and click the “Create new Renewal Info” button.
2. You will be taken to another layout *NewRenewalEntry*. Enter the following information about the grant (see Figure 4):
 - a. **Renewal Dates** – the start date for the renewal period should be already filled in to be the day after the end date of the previous renewal period.. The end date is generally four years later, but depends on the funding agency.
 - b. **NIH Codes** – these are the codes that make up the NIH agency number.
 - i. **Type** – the number at the front of the agency number and indicates the status of the grant (see <http://grants.nih.gov/grants/glossary.htm#A27>)
 - ii. **Activity Code (Act.)** – 3 character code indicating funding mechanism (see <http://grants.nih.gov/grants/glossary.htm#A>)
 - iii. **Institute (Inst.)** – the abbreviation for the NIH funding institute (see <http://grants.nih.gov/grants/glossary.htm#I>).

- iv. **Supplement code (Supp.)** – the code indication the award is a supplement to the main grant (see <http://grants.nih.gov/grants/glossary.htm#S>).
 - c. **Agency Number** - the agency number. For NIH grants, this is the 6 digit number only.
 - d. **Progress Report Due Date** – the date that the progress report is due to the funding agency.
3. Click the blue Continue button at the bottom of the field entry.

New Budget Period

You should add a new Annual entry when you receive an NGA (notice of grant award) for a new year of an existing grant

1. On the *DataEntry* layout, go to the Historic Annual Info tab and click the “Create new Annual Info” button.
2. You will be asked to confirm the addition of a new entry - choose "Yes."
3. Next, it will ask if the Brandeis number has changed (usually it doesn't except for training grants). Choose the appropriate option.
4. You will be taken to another layout *NewAnnualEntry*. Enter the following information about the grant (see Figure 5):
 - a. **Brandeis #** – this is the full Brandeis grant number, in order: the 2 digit fund, 5 digit department ID, 5 digit program and the 6 or 9 digit project or grant number.
 - b. **Principle Investigator (PI)** – this is the PI on the grant. Some Brandeis lines do not have PIs (like department lines) and the recipients of Fellowships are considered to be the PI of their own Fellowship.
 - c. **Display with** – this is the category that the grant will appear under when the grant listing is printed. For most research grants, this will be the PI's last name. Other possibilities appear in the drop down or autofill. **NOTE: This MUST be filled in for the grant to appear in the grant listings.**
 - d. **Grant Manager** – this is the current grant manager. Only the initials of the grant manager will appear in this field, though the drop down contains the full names.
 - e. **Groups that can use this grant** – this is the list of groups that have access to charging this grant. Each lab is a group and should be added to that PI's research grant. For example, John Smith's R01 should have Smith as a group. This field is very important to fill out accurately, as it is the basis for drop downs in many other databases.
 - f. **Budget year** – this contains the start date and end dates of the current budget year for this grant. The database will make a best guess as to these values, but please check them for accuracy!
 - g. **Agency year** – this is the total year of the grant. This defaults to 1 for the first year and increments by 1 thereafter.
 - h. **Direct Award** – the total direct award for the current budget year.
 - i. **Indirect Award** – the total indirect award for the current budget year.
 - j. **Other Award** – the total amount of other award for the current budget year.
 - k. **Total Award** – this field is calculated for you and is the total of the 3 previous fields.

1. **Notes** – this field is for any notes you may have about the current budget year. Notes about the grant in general belong on the *DataEntry* page (see the green box at the bottom of Figure 2).
8. Click the blue Continue button at the bottom of the field entry.

Note: The new entry will not appear in the Current Info tab until it is the current year - the Current Info tab always shows the entry for the current year, even if a new entry exists. You can always see all annual entries in the Historic Annual Information tab.

No cost extension

When a grant receives a no cost extension, go to the *DataEntry* page for the grant and then click “Yes” on for No Cost (see green arrow in Figure 2). You will be prompted to enter the new end date for the grant. Do **not** create a new annual entry.

Ending a grant

You should end a grant **only** after the final close out is completed. It will be automatically removed from the active listing after the last day of the grant, but will remain as active in the database to indicate that there are outstanding charges to confirm.

To end a grant, go to the *DataEntry* page for the grant and then click the “End This Grant” button (see red arrow in Figure 2). You will be asked to confirm your choice.

Revising existing grant information

To revise existing grant information, go to the appropriate tab in the *DataEntry* layout, and edit the field. Only fields with white backgrounds are editable. If you are unsure if you should change information or if you cannot find the correct field, please contact Jessica (jmaryott@brandeis.edu).

Reminder system

When you log in to BioGrants, a new window will open listing your current reminders (see Figure 6). You can also bring up your reminders at any time by clicking the “Show my reminders” button (see Figure 2) These reminders currently fall into two categories: annual entry ending and renewal year ending. Each one is created if:

1. an entry’s end date is within 30 days of today’s date **and**
2. there is no future entry.

Once you create the new entry (or end the grant), you should then change the status of the reminder to completed. If you are waiting for the NGA (notice of grant award) to come in, you can snooze the reminder for a number of days, after which point it will show up again.

Your reminders (if this is blank, you have no reminder)

Grant Manager

Grant

Type

Status Active Completed

Notes

Figure 6: Reminders

Finding grants

There are 2 ways to find a specific grant:

1. If you know the 6 or 9 digit project number, you can enter it on the *StartHere* layout and click the “Find” button
2. You can also go to the *DataEntry* layout and click the Filemaker Find button in the top menu (the grey bar at the top of Figure 2). This will allow you to enter any of the fields that appear in the *DataEntry* layout (like the PI name). After typing in the field(s), click the Perform Find button that appears in the grey bar where the Find button was.

Reports (not done)

Grant Listings

Training Grant and Fellowship Listing

Federal and Non-federal Grant Listing

University Funding Listing

Excel Exports

Grant Listing

Salary tracking

Total Grant Funding

Online request system

At the bottom of the database is a link to a website, which contains a series of questions. Fill out that form with as much information as possible. Jessica will be looking at the new requests frequently and adding as much as possible. This is true for FAQs, features and bugs. If there is a bug that seems serious, see/email Jessica immediately.

Appendix 1: Event listing with links to instructions

Paperwork Received

New grant notice

Receive NGA

No cost extension

Reminders

Renewal reminder

Annual reminder

Definitions

Layout

Table

Record

Mode=

Field