

Contracts and Grants Accounting

Department Contact Maintenance

C&G Training Presentation

Department Contact Maintenance

OBJECTIVE : CGA uses the information in Department Contacts to notify individuals associated with a specific department/unit about award activities in their area

- **It is incumbent upon Departments to keep this Contact information current**
 - Typically, only Supervisors and Managers will be updating the Department Contact information, but this is left to the Department's discretion

Department Contacts in BFS - Search

- **Navigation:** Favorites ▾ | Main Menu ▾ > Grants ▾ > RA Grants WorkCenter > Contacts
 - Main Menu > Grants > RA Grants WorkCenter > Contacts

Once you have clicked the *Contacts* link, search by the Department field (which is DeptID #) only.

Be sure to select Include History.

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RA Grants WorkCenter

Main | Reports/Queries

My Work

Links

Award Setup

- Budget CSV Templates
- Budget Upload
- Review Import/Export Logs
- Budget Categories on UC_GM_KK_TREE
- Define ChartField Values

Award Information

- Award Profile
- Project Budget Inquiry
- Review Contract Summary

Receivables

- Collections Workbench
- Select Conversations to Review
- Update Conversations

Department Contact Maintenance

- Contacts**

Award Closeout

- Closeout Certification Form
- Closeout Exception Request

Department Contacts

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

SetID: = 10000

Department: begins with

Manager Name: begins with

Include History Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

Only the first 300 results can be displayed.

View All First 1-100 of 300 Last

SetID	Department	Description	Manager Name
10000	00001	ZABUD Ctrl Ops Budg-Gen Camp	(blank)
10000	00001	ZABUD Ctrl Res: Core Funds	(blank)
10000	00002	ZABUD Ctrl Ops Budg-Hlth Sci	(blank)
10000	00002	ZABUD Ctrl Res: Other Unrestr	(blank)
10000	00002	ZABUD Hlth Sci Pos Funding	(blank)

Department Contacts in BFS – Contacts Page

- The Contacts page opens to the selected Department

The screenshot shows the BFS Contacts page for Department 14190. The page is titled "Contacts" and displays the following information:

- Department Information:** SetID 10000, Department 14190, Description CURCH CSSR NonProfitManagement.
- Department Contacts As Of:** *Effective Date 06/27/2014, *Status Active. Navigation: Find | View All | First 1 of 1 | Last.
- Contact Details:** *Empl ID 010754480, Nancy Nelson, Job Code 7378, Administrative Officer 4, *Location CAMPUS, BUSN, Email nancyn@berkeley.edu. Navigation: Find | View All | First 1 of 5 | Last.
- Approval Authority:** A red-shaded section containing fields for Unlimited Threshold, Legally Bind Institution, Currency, and Threshold Amount.
- Phone:** *Type BUSN, Phone 643-1703. Navigation: Personalize | Find | View All | First 1 of 1 | Last.
- Official:** *Type Department Contact. Navigation: Personalize | Find | View All | First 1 of 1 | Last.

Callout boxes provide additional context:

- Department Information:** Points to the Department 14190 field.
- Approval Authority fields will not be utilized:** Points to the red-shaded Approval Authority section.
- Be sure to select View All to see all current contacts:** Points to the "View All" link in the "Department Contacts As Of" section.
- Department Contact Details:** Points to the "Contact Details" section.

At the bottom of the page, there is a navigation bar with buttons: Save, Return to Search, Previous in List, Next in List, Notify, Update/Display, Include History, and Correct History.

Department Contacts in BFS – Add/Update Contact

- **Add/Updating a Contact**

1. Whether you are adding a new contact, or updating an existing contact, always create a new effective dated row by clicking the “+” button under the “Department Contacts As Of” header

**Note: Attempting to update or add a new contact without creating a newly effective dated row will result in a “correct history” error*

Contacts

SetID 10000 Department 14190 Description CURCH CSSR NonProfitManager

Department Contacts As Of Find | View All First 1 of 1 Last

*Effective Date 06/27/2014 *Status Active + -

Contact Details Find | View All First 1 of 5 Last

*Empl ID 010754480 Nancy Nelson + -

Job Code 7378 Administrative Officer 4

*Location CAMPUS

BUSN

Email nancyn@berkeley.edu

Department Contacts in BFS – Add/Update Contact

- **Add/Updating a Contact**

2. Any changes to the Department Contacts (new contact, update existing contact) should be made to this new effective dated row
 - a. Notice that the Effective Date defaults to today's date
 - b. A new row is created, with the most current effective dated row identified first
3. Click the “+” under the **Contact Details** header to create a new Contact

**Note: By amending only newly effective dated rows, historical records remain intact*

The screenshot shows the BFS interface for Department Contacts. At the top, there are fields for SetID (10000), Department (14190), and Description (CURCH CSSR NonProfitManagement). Below this is a section titled "Department Contacts As Of" with a search bar for "Find | View All" and pagination "First 1 of 2 Last". A callout box labeled "2a" points to the "*Effective Date" field, which contains "08/18/2014" and a calendar icon. To the right, there is a "*Status" dropdown menu set to "Active" with "+" and "-" buttons. A callout box labeled "2b" points to the "1 of 2" pagination. Below this is a section titled "Contact Details" with another search bar and pagination "First 1 of 5 Last". The contact information is displayed as follows:

*Empl ID	010754480	Nancy Nelson
Job Code	7378	Administrative Officer 4
*Location	CAMPUS	
	BUSN	
Email	nancyn@berkeley.edu	

Callout box "3" points to the "+" button next to the "Contact Details" header.

Department Contacts in BFS – Update Contact Details

The screenshot displays the 'Department Contacts As Of' interface. At the top, there are navigation options: 'Find | View All', 'First 1 of 2 Last'. Below this, the '*Effective Date' is set to '08/18/2014' and '*Status' is 'Active'. The 'Contact Details' section shows the following information:

*Empl ID	010754480	Nancy Nelson
Job Code	7378	Administrative Officer 4
*Location	CAMPUS	
	BUSN	
Email	nancyn@berkeley.edu	

Callouts 1, 2, 3, and 4 point to the *Effective Date, *Empl ID, *Location, and Email fields, respectively.

Updating Contact Details

1. Empl ID - drives Job Code, Location and Email field values
2. Job Code – auto-populates from Empl ID selection
3. Location – auto-populates from Empl ID selection
4. Email – auto-populate from Empl ID selection

Department Contacts in BFS – Update Contact Phone

*Type	Phone
BUSN	643-1703

Look Up Type

Cancel

Search Results

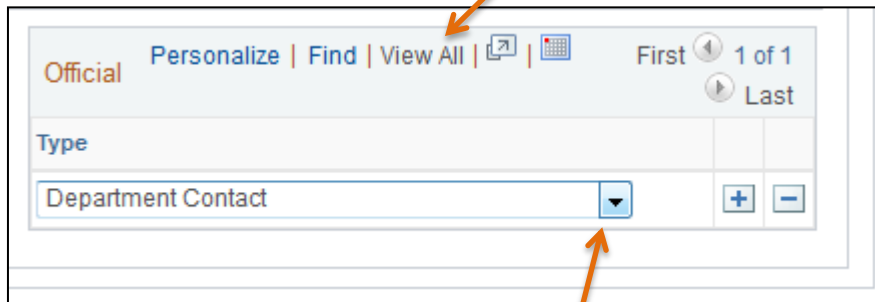
Empl ID	Phone Type
012488415	Cellular
012488415	Home

Contact Phone Type

- Will default from Empl ID selection
- Typically, options include:
 - Business
 - Home
 - Cellular

Department Contacts in BFS – Update Contact Type

Select *View All* for a complete listing of assigned Contact Types.



The screenshot shows a web interface with a navigation bar containing 'Official', 'Personalize', 'Find', 'View All', and a calendar icon. Below the navigation bar is a table with a header row for 'Type'. The first row of the table has a drop-down menu currently set to 'Department Contact' and two buttons, '+' and '-'. An orange arrow points from the 'View All' button in the navigation bar to the top of the table. Another orange arrow points from the bottom of the table to the drop-down menu.

Open the drop-down menu to select the appropriate Contact Type. If a contact holds multiple Contact Types within a Department (i.e. Dean and Department Manager), click the (+) arrow to add a second row.

Department Contact Types

- Dean
- CAO
- Department Chair
- Department Manager
- CSS – RA Manager
- CSS – RA Supervisor
- Effort Reporting Contact
- Effort Reporting Coordinator

Department Contacts in BFS – Saving Changes

- **Add/Updating a Contact**
 - Once all changes have been made, click the Save button to finalize all changes

Contacts
SetID 10000 Department 14190 Description CURCH CSSR NonProfitManagement

Department Contacts As Of Find | View All First 1 of 2 Last
*Effective Date 08/18/2014 *Status Active

Contact Details Find | View All First 1 of 5 Last

*Empl ID 010754480 Nancy Nelson
Job Code 7378 Administrative Officer 4
*Location CAMPUS
BUSN
Email nancyn@berkeley.edu

Approval Authority
 Unlimited Threshold Currency
 Legally Bind Institution Threshold Amount

Phone Personalize | Find | View All | First 1 of 1 Last
*Type HOME /527-8331

Official Personalize | Find | View All | First 1 of 1 Last
Type Department Contact

Save Return to Search Previous in List Next in List Notify Update/Display Include History Correct History

Associating Contacts with an Award

- Going forward, the **Post-Award Administrator field** will associate Post-Award Administrators (Department RAs) to an Award
- Phasing out use of the Grants Administrator hyperlink on Award Profile page

The Post-Award Administrator field within the Award Profile will be maintained by CGA, but it is the Departmental RA's responsibility to maintain the underlying Department Contacts information

Associating Contacts with an Award – Award Profile Page

The screenshot displays the Oracle Award Profile page for Award ID 000266. The page includes a navigation menu at the top with options like 'Award', 'Funding', 'Resources', etc. The main content area contains several fields: Reference Award Number (P30 EY003176-26), Title (CORE Grant for Vision Research), Long Description (CORE Grant for Vision Research), Award PI (Richard Kramer), Sponsor (NIH National Eye Institute), Post Award Administrator (empty), Purpose (BARE), Status (Accepted), Award Type (Grant), CFDA (93.867), Proposal ID (000266), Version ID (V101), Start Date (08/01/2008), and End Date (07/31/2013). At the bottom, there are navigation links: View Contract, View Proposal, Additional Information, Grant Administrator, and Sponsor Website. Two callout boxes with orange borders and arrows provide information: one points to the 'Post Award Administrator' field, stating it will be used going forward, and another points to the 'Grant Administrator' link, stating it will be phased out.

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Favorites ▾ Main Menu ▾ > Grants ▾ > RA Grants WorkCenter > Award Profile

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Award Funding Resources Certifications Terms Milestones Key Words Funding Inquiry

Award ID 000266

Reference Award Number P30 EY003176-26

Title CORE Grant for Vision Research

Long Description CORE Grant for Vision Research

Award PI Richard Kramer Reporting Role

Sponsor NIH National Eye Institute

Post Award Administrator

Purpose BARE

Status Accepted

Award Type Grant

CFDA 93.867

Proposal ID 000266

Version ID V101

Start Date 08/01/2008

End Date 07/31/2013

View Contract View Proposal Additional Information **Grant Administrator** Sponsor Website

The Post-Award Administrator field will be used going forward

The Grant Administrator link will be phased out

Contracts & Grants Implementation Project

[http://controller.berkeley.edu/departments/
contracts-grants-accounting](http://controller.berkeley.edu/departments/contracts-grants-accounting)

contractsgrants@berkeley.edu