

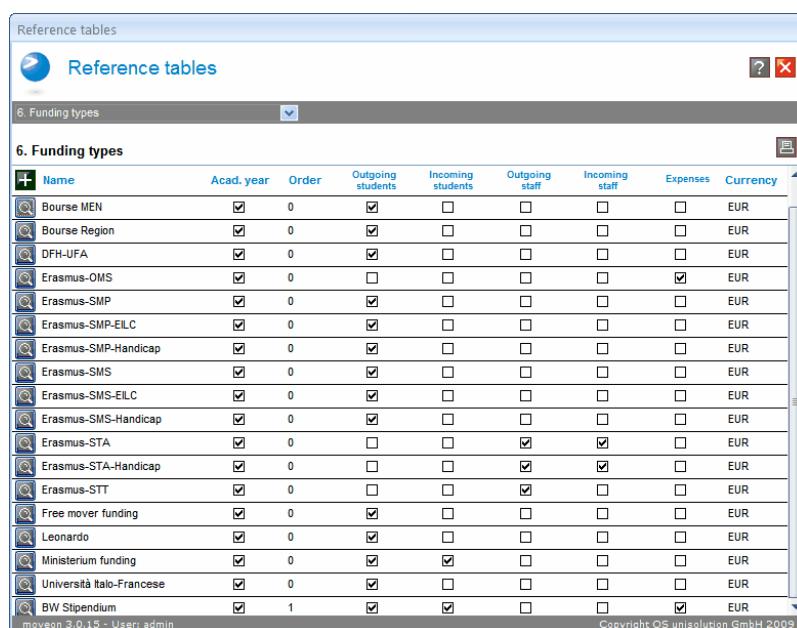
7.2 - Managing grants

This section describes the steps involved in managing grants, from defining the funding type to processing the data, including the payment of grants.

1- Defining the funding type

Each funding has to be associated with a funding type. The funding types are defined in the moveon reference tables. If the funding type you require has not already been defined, then you will have to add it. To do so, use the "Reference tables" form, which can be accessed from the main menu under "Configuration". The funding types can be configured in step 5 of the reference tables.

Details of how to add a funding type can be found in section 4.2.



The screenshot shows a web application window titled "Reference tables" with a sub-tab "6. Funding types". It displays a table with the following columns: Name, Acad. year, Order, Outgoing students, Incoming students, Outgoing staff, Incoming staff, Expenses, and Currency. The table lists various funding types with their respective configurations.

Name	Acad. year	Order	Outgoing students	Incoming students	Outgoing staff	Incoming staff	Expenses	Currency
Bourse MEN	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Bourse Region	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
DFH-UFA	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-OMS	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	EUR
Erasmus-SMP	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-SMP-ELC	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-SMP-Handicap	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-SMS	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-SMS-ELC	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-SMS-Handicap	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-StA	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-StA-Handicap	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EUR
Erasmus-STT	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Free mover funding	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Leonardo	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Ministerium funding	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
Università Italo-Francese	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EUR
BW Stipendium	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	EUR

Fig. 1: "Reference tables" form, "Funding types" configuration

2- Defining the funding

Once the funding type has been defined in the configuration you must define the funding. To do so, open the "Funding" form, which can be accessed from the main menu under "Funding".

Revenue		Expenses	
10.08.09	Repayment to national agency	-1.230,00 EUR	1st payment
26.06.09	Remaining funds	17.345,00 EUR	2nd payment
01.09.08	1st payment National Agency	16.321,00 EUR	3th payment
			Remaining funds
			Repayment
Total		32.436,00 EUR	33.535,55 EUR
			Available: -1.099,55 EUR

Fig. 2: "Funding" form

Use the Add button to add the funding. Details of how to add a funding can be found in section 7.1.

Fig. 3: Add/edit funding window

3- Defining grant statuses

Each grant has to be associated with a grant status in order to be able to identify the applicable assignment rules for this grant. You will therefore have to predefine the grant statuses associated with the funding before you can assign the grants (see section 7.1).

To do so, click the Add button in the "Statuses" tab on the "Funding" form. In the Add/edit grant statuses window, indicate the use (e.g. Outgoing students), a code (e.g. A) and a name (e.g. Standard rate recipients) for the status. Next you should define the assignment rules: fixed amount of the grant, minimum and maximum authorised amount of the grant by time unit, minimum and maximum authorised duration of the grant.

Fig. 4: Add/edit statuses window

4- Defining expense types

Each grant payment has to be associated with an expense type in order to be able to identify the nature of the payment. You will therefore have to predefine the expense types associated with the funding before you can make the grant payments (see section 7.1).

To do so, click the Add button in the "Expense types" tab on the "Funding" form. In the Add/edit expense types window, indicate the use (e.g. Outgoing students) and the name of the expense type (e.g. First payment, Travel expenses).

Fig. 5: Add/edit expense types window

5- Defining resources

Before making the grant payments you need to define the funding resources. To do so, click the Add button in the "Entries" tab on the "Funding" form. In the Add/edit entries window select Resource as the entry type and then enter the date, the name and the amount of the payment received.

The screenshot shows a window titled 'Entries' with a blue header and a grey bar containing a green checkmark icon and a red 'X' icon. The main content area is white and contains the following fields:

- Funding:** Erasmus-SMP-EILC 2008/09
- Type:** Radio buttons for 'Revenue' (selected) and 'Expense'.
- Expense type:** A dropdown menu with a green '+' icon to its right.
- Date:** A text box containing '16.10.09' and a calendar icon to its right.
- Description:** A large text input field.
- Amount:** A text box containing '0,00' followed by 'EUR'.
- Paid:** A checkbox.
- Remarks:** A large text input field.

Fig. 6: Add/edit entries window

6- Assigning grants

Once you have defined the funding, the statuses and the expense types, you can assign the grants to the persons concerned (see section 5.2). To do so, click the Add button in the "Grants" tab on the "Mobilities" form for each person concerned. In the Add/edit grants window indicate the funding, the status and the duration of the grant.

The screenshot shows a window titled 'Entries' with a blue header and a grey bar containing a green checkmark icon and a red 'X' icon. The main content area is white and contains the following fields:

- Funding:** Erasmus-SMS 2008/09
- Type:** Radio buttons for 'Revenue' (selected) and 'Expense'.
- Expense type:** A dropdown menu with a green '+' icon to its right.
- Date:** A text box containing '18.09.09' and a calendar icon to its right.
- Description:** A large text input field.
- Amount:** A text box containing '0,00' followed by 'EUR'.
- Paid:** A checkbox.
- Remarks:** A large text input field.

Fig. 7: Add grants window

7- Paying grants

The payment of grants is carried out by adding the entries associated with the grants.

There are two ways of doing this:

- Manually, for each grant (see section 7.1)
- Automatically, for several grants, using the grant calculation form (see section 7.3).

To make an individual payment for a grant, click the Details button corresponding to the desired payment in the "Grants" tab on the "Funding" form or the "Mobilities" form. Then in the "Grants" form click the Add button in the "Entries" frame. In the Add/edit entries window indicate the expense type, the date, the name and the amount of the payment.

The screenshot shows a web application window titled 'Grants'. At the top left is a logo and the word 'Grants'. Below this, there are two tabs: a green checkmark and a red 'X'. The main content area displays the following information:

- Person:** Hillary Bell
- Institution:** United Kingdom - University of Glasgow
- Funding:** A dropdown menu with a blue arrow pointing down.
- Status:** A dropdown menu with a blue arrow pointing down and a green '+' button to its right.
- Duration:** A text field containing '7 mths.' with a small calendar icon to its right.
- Planned:** A text field containing '0,00'.

Fig. 8: Add/edit entries window, manual addition

To make an automatic payment for several grants, use the "Grant calculation" form by clicking the corresponding button in the "Tools" tab on the "Funding" form. The calculation of grants is described in detail in section 7.3.

The screenshot shows a web application window titled 'Entries'. At the top left is a logo and the word 'Entries'. Below this, there are two tabs: a green checkmark and a red 'X'. The main content area displays the following information:

- Funding:** Erasmus-SMS 2008/09
- Type:** Radio buttons for 'Revenue' (selected) and 'Expense'.
- Expense type:** A dropdown menu with a blue arrow pointing down and a green '+' button to its right.
- Date:** A text field containing '18.09.09' with a small calendar icon to its right.
- Description:** A large text area.
- Amount:** A text field containing '0,00' followed by 'EUR'.
- Paid:** A checkbox.
- Remarks:** A large text area.

Fig. 9: "Calculation" form, addition via the calculation function

8- Processing grant data

The "Selection of grants" form can be used to process the details of grants associated with a funding, including the total amount of each grant. This selection does not allow you to process details of the associated entries.

Examples of its use:

- List of recipients of funding with the total amounts for each recipient
- Creating a financial contract for each recipient, with the planned total amount of grant
- Sending an email to all recipients of the same funding

9- Processing entry data

The "Selection of entries" form can be used to process the details of entries associated with a funding. This selection does not allow you to process grants with no associated entries.

Examples of its use:

- Creating payment slips including the list of entries of the same expense type (first payment, redistribution) on a given date to allow a payment to be made
- Sending individual emails to recipients notifying them of a grant payment with the amount and the date of this payment