HOW TO SET UP COLUMNS FOR THE ACTUALS SCREEN IN GMS - PROJECT STATUS TO VIEW LABOR DISTRIBUTION DATA

BACKGROUND: With the implementation of the new Labor Distribution module of Oracle, payroll related transactions are going to appear in the Actuals screen of the Grants Management System (GMS)-Project Status differently than they have in the past. Employees who have been assigned the role of Project Manager (PI) or Business Manager (Department Administrator) for the project account in GMS, will have the ability to see the names of the people who were paid and the related dollar amounts for each pay period. Employees who have been assigned the role of Grants Access will not be able to see the names of the people who were paid, but they will be able to see the amounts of salary and fringe charged to the grant account. In the past, the amounts for Payroll appeared in the “Quantity” column of the Actual expenditures screen of Project Status. Now the amount appears in the “Project Burdened Cost” field, which is not in the standard Oracle view for Actuals.

PURPOSE: These instructions will allow you to set up your folder in the Actuals screen to view the amount information, as well as the Employee Name and the Supplier Name for AP transactions.

1. Log into Oracle-TAMS and choose your Org responsibility that allows you to see your grant accounts.
2. If you are already logged into TAMS, open Grants Management, then Project Status.
3. Enter the project number and click Find.
4. Click Task Status, then Actuals. Enter the Period you want to review. (Note: The Labor Distribution started in August 2013) Click Find.

5. This is the standard view provided by Oracle. This view needs to be modified in order to see the dollar amounts related the new Payroll-Labor Distribution transactions, as well as the Employee Name and Supplier Name.
6. A modified folder template for PIs and Business Managers has been established, therefore you will not need to add or resize columns unless you choose to do so. To access this template, click on the Folder Tools icon. Then, click on the Open Folder icon. You will see the “End User Actuals” folder. Click on it and then click OK.

7. The columns will be updated.
8. To save this view so it will open automatically when you open Actuals in the future, click on the New Folder icon with the green plus sign and change the Folder name to your name.

   a. Change the name of the Folder from “End User Actuals” to your name
   b. Check the “Open as Default” option AND
   c. Uncheck the “Public” option
   d. Click OK.

If saved properly, this view will open automatically each time the Actuals form is opened in the future.