



## Add or Change Project Credit Distribution Information

Use these instructions to add or change project credit distribution information. This procedure is used when multiple departments share an award and credit for direct and indirect costs needs to be distributed between the departments and principal investigators based upon a specific percentage of expenditures.

### Prerequisites

- You must have one of the following responsibilities to add or change project credit distribution information:
  - ORG Account Establishment Administrator
  - ORG Account Establishment Specialist with Budget Approval
  - ORG Account Establishment Specialist
  - ORG OGM Billing Specialist
- The award and project must be established in the Oracle business system.

### To add or change project credit distribution information:

1. Navigate to **Projects > Find Projects** to the Find Projects form.
2. Enter the **Project Number**, click **Find** click **Open** to open the **Projects, Templates** form.

The screenshot shows the 'Projects, Templates' form in Oracle. The form is titled 'Projects, Templates' and displays the following information:

- Operating Unit: The Research Foundation for SU
- Number: 1152728
- Name: 100 UPenn Hirschfeld
- Type: Standard
- Organization: 100 Medicine
- Long Name: 100 UPenn Hirschfeld
- Trans Duration: 16-AUG-2018 - 31-MAR-2019
- Status: Approved
- Description: Increasing engagement and improving HIV
- Public Sector:
- Workflow in Process:
- Template:
- Change Status:

Below the main form is an 'Options' section with a list of options:

- Option Name
- Tasks (selected)
- Classifications
- Key Members
- Transaction Controls

A 'Detail' button is located at the bottom right of the form.

3. On the Menu bar, click **Tools** and select **Credit Distribution** from the drop-down menu. This opens the RF\_AWD\_PROJ\_RELATION form.
4. Select the **Award Number** that funds the project on which you are adding or changing the credit distributions.

Award Number	Percentage
64174	0

- Tools Window Help
- Monitor Project Workflows
- Update Transaction Dates
- Update Tasks
- Process Updates
- Copy to all Tasks
- Copy to all tasks without Manual Overrides
- Copy to all Subtasks
- Copy to all Subtasks without Manual Overrides
- Credit Distribution**
- Credit Recognition

**Note:** You may need to use the left scroll bar to find the Award Number.

5. Click **Edit** to open the **Credit Distribution** form.

**Note:** The window displays the currently defined credit distribution percentages. If you are adding information for the first time, the form will be blank.

6. Click in the **Organization** field to activate the List of Values. Select an organization from the List of Values. Enter the department that will be credited for the distribution percentage.
7. Click in the **PI/Co-PI** field to activate the List of Values. Enter the Principal Investigator or Co-Principal Investigator that will receive the credit distribution on the Project/Award from the List of Values (Optional).

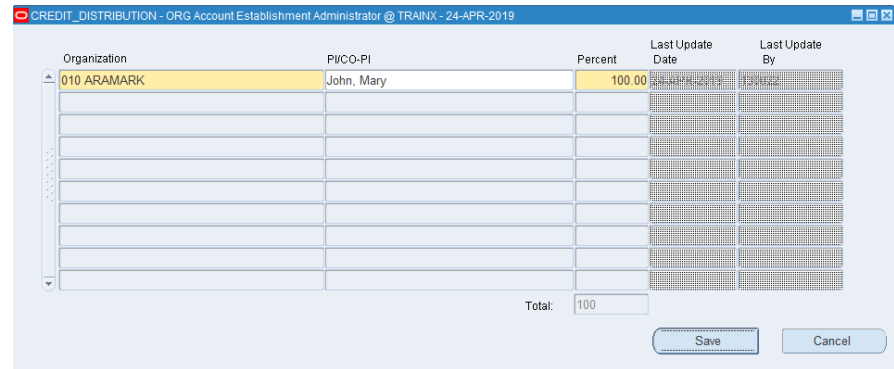
Organization	PI/CO-PI	Percent	Last Update Date	Last Update By

Total:

8. Click in the **Percent** field and complete or change the percent of credit distribution being given.

**Note:** The record will not save unless the total percent column equals 100%. You will receive an error message notifying you of the problem. Return to the Credit Distribution form and add the remaining percentages to ensure the column totals 100%.

9. Click **Save** to update your changes. The **Last Update Date** and **Last Update By** fields generate data automatically when the record is saved in the system.



Organization	PI/CO-PI	Percent	Last Update Date	Last Update By
010 ARAMARK	John, Mary	100.00	25-APR-2019	1309002

Total: 100

Save Cancel