



Process - Create an Award

Use these instructions to create an award and fund a project or a project and task.

Prerequisites

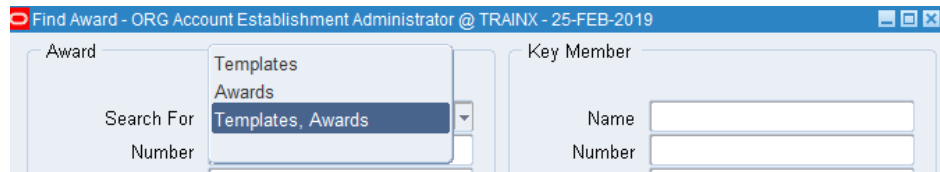
- You must have one of the following responsibilities to create an award:
 - ORG Account Establishment Administrator
 - ORG Account Establishment Specialist
 - ORG Account Establishment Specialist with Budget Approval
- To facilitate funding a project or a project and task with the new award, be sure the following information is already entered in the system:
 - The project or task to be funded by the new award.
 - The sponsor's information, including bill-to and ship-to contacts, must be established in the Customer File.

To create an award:

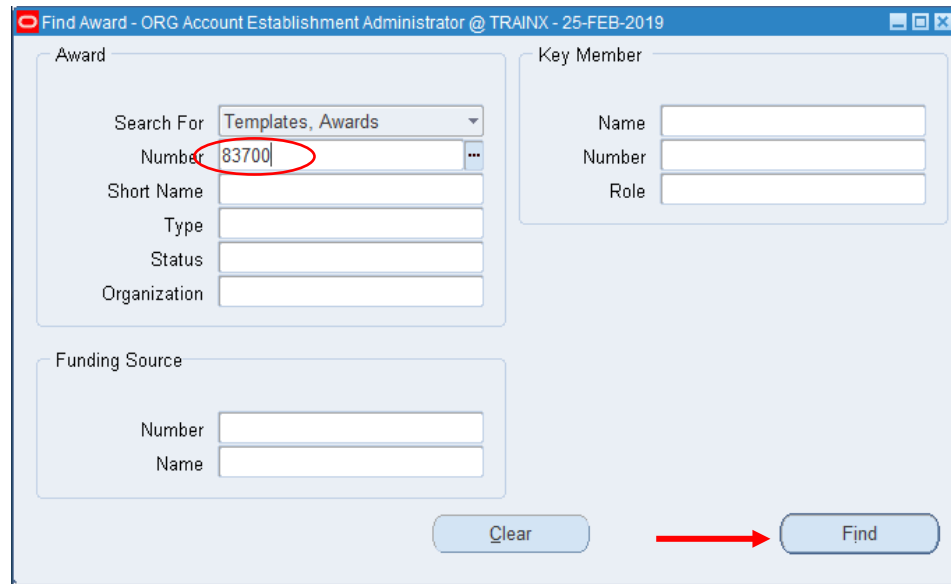
1. Select **Awards** to go to the **Find Award** form.

Note: You must use an award template or an existing award from the same sponsor to create a new award. The sponsor field is protected and can't be changed.

2. Narrow your search by selecting search criteria from the List of Values.

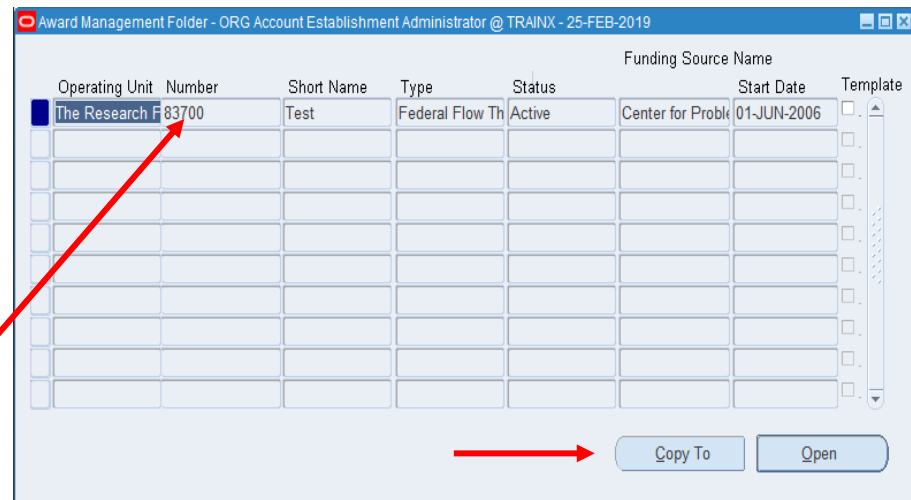


3. Enter the **Award number**, click **Find**.



The Award Management Folder form displays.

4. Click in the **Number field box**.



5. Click **Copy To** to open the **Award Quick Entry** form.

Award Quick Entry Form

The Number field will populate automatically upon clicking ok.

- Enter a **Short Name**
- Enter a **Full Name**.
- Enter the **Funding Source Name**.
- Enter the **Funding Source Award Number**, if known.
- Enter the **Start Date**.
 - **NOTE:** If the award has a **Pre-Award Start Date**, this must be used as the **Award & Installment Start Date**
- Enter the **End Date**.
- Enter the **Close Date**.
- **Enter Award Type**.
- Status options are **Active, At Risk, Closed, On Hold**, from the List of Values.
- Enter the **Purpose** from the List of Values.
- Enter the **Organization** from the list of values.

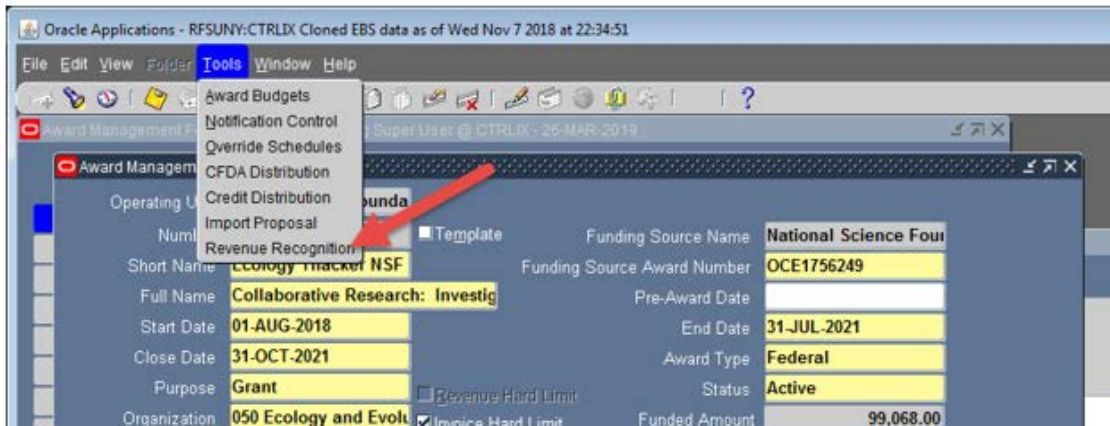
Award Number	AUTOMATIC	Funding Source Name	Center for Problem C
Award Short Name		Funding Source Award Number	N/A
Full Name		Start Date	01-JUN-2006
End Date	31-DEC-2019	Close Date	22-MAY-2020
Award Type	Federal Flow Through	Purpose	Grant
Organization	010 Professional Develo	Status	Active
Award Manager	Manager, Default Award	Revenue Distribution Rule	Cost
Terms	30 NET	Billing Distribution Rule	Event
Billing Cycle	Other	Non-Labor Invoice Format	Summarized Nonlabor
Labor Invoice Format	Summarized Labor	Indirect Cost Rate Schedule	TDC Zero
Amount Type	Project to Date	Boundary Code	Project
Allowed Cost Schedule	All Expenditure Types		

- The system will automatically fill in the value of Award **Manager**, Default Award for this field.
- Enter the **Revenue Distribution Rule** from the List of Values.
- Enter the **Payment Terms** for the award from the List of Values.
- Enter the **Billing Distribution Rule** used for the award from the List of Values.
- Enter the invoice frequency from the List of Values for the **Billing Cycle**.
- Accept the default for **Labor Invoice Format** and **Non-Labor Invoice Format**.
- Choose from the List of Values for the **Indirect Cost Rate Schedule**.

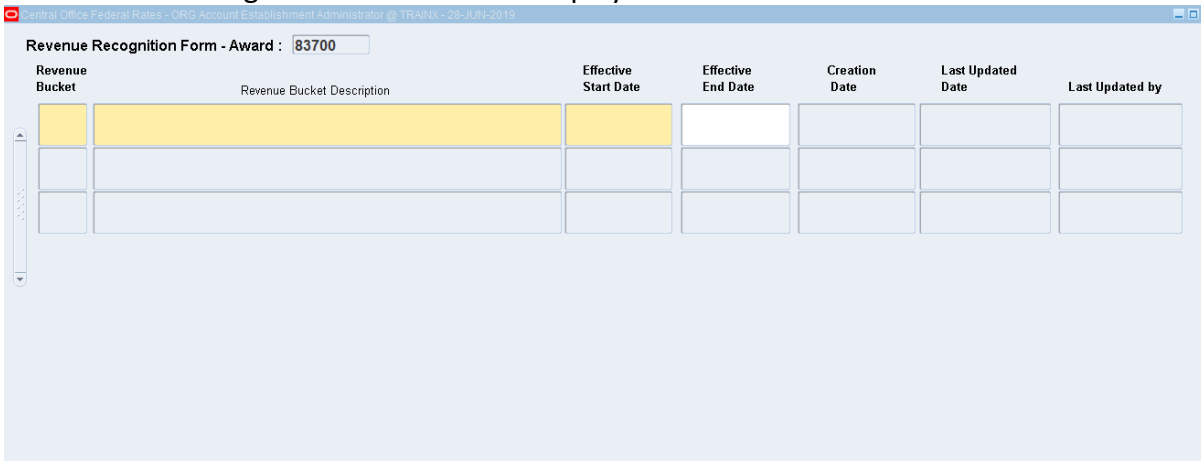
6. Click **OK** to save.

The Award Management form displays with the Award number and fields populated.

7. On the Tools Menu, Click Revenue Recognition.



8. The Revenue Recognition Form will now display.



9. Click in the Revenue Bucket field and the list of values will display, choose the correct bucket number from list of values, enter the Effective Start Date and save the record.

Central Office Federal Rates - ORG Account Establishment Administrator @ TRAINX - 28-JUN-2019

Revenue Recognition Form - Award : 83700

Revenue Bucket	Revenue Bucket Description	Effective Start Date	Effective End Date	Creation Date	Last Updated Date	Last Updated by

Revenue Buckets

Find %

Bucket	Revenue Bucket description
1	Revenue to be recognized upon allowable expenditure of funds. (i.e. cost-reimbursable, allowable spend...
2	Revenue to be recognized upon meeting conditions on the Agreement, and billing is on the same basis.
3	Revenue to be recognized upon meeting conditions in Agreement, while billing is not event-based.
4	Revenue to be recognized upon the fulfillment of a service or delivery of a product, to the Sponsor, and bil...
5	Revenue to be recognized upon delivery of work product or fulfilling services contracted by Sponsor, whil...
6	Revenue to be recognized at the ending date of the Agreement, 100% to be refunded to sponsor if conditi...
7	Revenue to be recognized at the beginning/effective date of the agreement; unconditional funding by spo...


Find OK Cancel

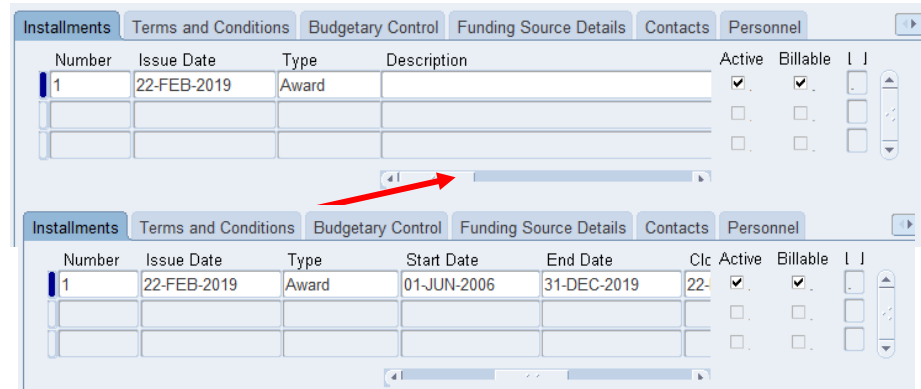
Central Office Federal Rates - ORG Account Establishment Administrator @ TRAINX - 28-JUN-2019

Revenue Recognition Form - Award : 83700

Revenue Bucket	Revenue Bucket Description	Effective Start Date	Effective End Date	Creation Date	Last Updated Date	Last Updated by
1	Revenue to be recognized upon allowable expenditure of funds. (i.e. cost-reimbursable; allowable spend = revenue).	01-JUL-2019		28-JUN-2019	28-JUN-2019	650HARTZAN

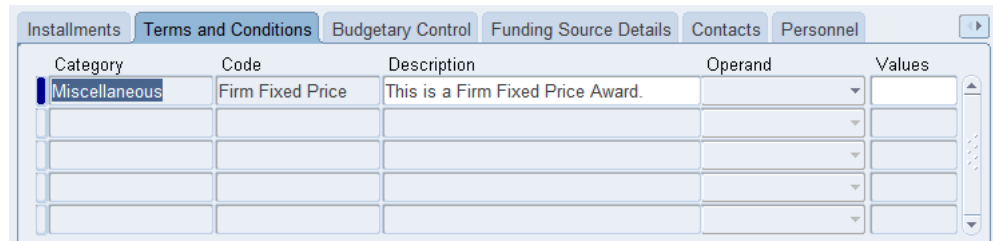
10. Click the **Installments** tab.

- Enter the **number of installments**.
- Enter the **Issue Date**.
- Enter the **Type**.
- Enter a **Description**.
- Use the horizontal scroll bar to view the remaining fields.
- Enter the **Start Date/End Date**.
- Enter the **Close Date**.
- Enter the **Direct /Indirect Cost**.
- View the **Total**.
- Check the **Active Checkbox** if the installment was officially awarded.
- Click **File> Save** or click the  **Save icon** on the tool bar.



11. Click the **Terms and Conditions** tab. Enter the Category from the List of Values.

- Enter the **Code** from the List of Values.
- The Description is automatically populated.
- **Operand** is automatically populated or not needed.
- **Values** is optional and only assigned for certain terms and conditions.
- Click **File> Save** or click the **Save icon** on the tool bar.



12. Click the **Budgetary Control** tab.

- Select the **Award** from the List of Values.
- Select the **Tasks** from the List of Values.
- Select the **Resource Groups** and **Resources** from the list of Values.
- Project to Date defaults in the **Amount Type** field.
- **Boundary Code** defaults to Project.
- Click **File> Save** or click the **Save icon** on the tool bar.

The screenshot shows a software interface with several tabs: Installments, Terms and Conditions, Budgetary Control (selected), Funding Source Details, Contacts, and Personnel. The Budgetary Control tab is active and contains the following fields:

- Levels:**
 - Award: Absolute
 - Tasks: Absolute
 - Resource Groups: None
 - Resources: None
- Workflow:**
 - Enable Workflow for Budgets
- Time Phase:**
 - Amount Type: Project to Date
 - Boundary Code: Project

13. Click the **Funding Source Details** tab.

- Click in the **Funding Source Name**. Populated from the Award Quick Entry form.
- **Funding Source Number** is automatically populated by the system.
- **Bill to/Ship to Address** fields are automatically populated, but can be changed.
- Click **File> Save** or click the **Save icon** on the tool bar.

11. Click the **Contacts** tab.

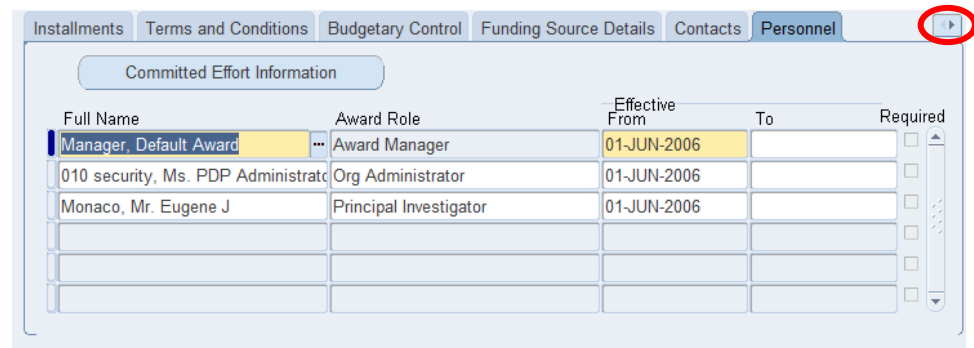
- Enter the contact person's **last and first names** and **title**.
- Leave the **Job, Mail Stop** fields blank.
- The **Reference, Primary and Active** field/checkboxes automatically populates.
- Choose Bill To/Ship to for the **Usage** fields.
- **Area Code, Telephone Number, Extension** and **Type** are optional fields.
- **Primary and Active** checkboxes are automatically populated.
- Click **File> Save** or click the **Save icon** on the tool bar.

- Contacts							
Last	First	Title	Job	Mail Stop	Reference	Usage	Primary Active
Scott	Micheal				36978	Bill To	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Scott	Micheal				36978	Ship To	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

- Phones					
Area Code	Telephone Number	Extension	Type	Primary	Active
608	238-2843		Fax	<input type="checkbox"/>	<input checked="" type="checkbox"/>
608	238-2844		General	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

12. Click the **Personnel** tab

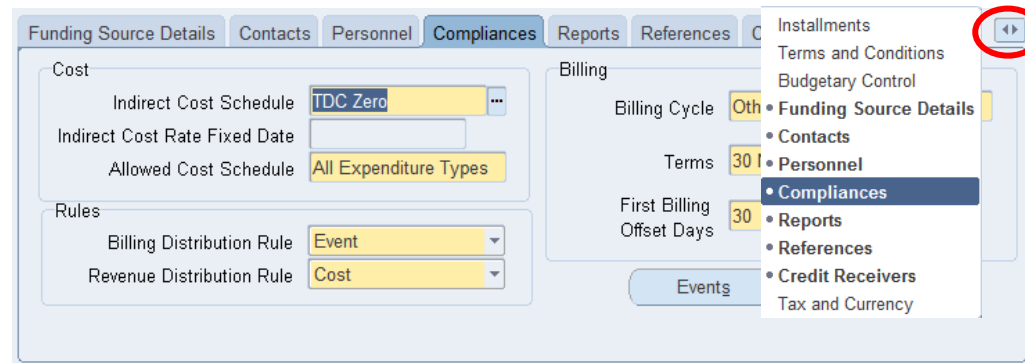
- Enter the **Full Name**.
- Enter the **Award Role**.
- Enter the **Effective From/To dates**.
- Click **File> Save** or click the **Save icon**.



13. Click the **arrow** to the right of the Personnel tab to view the remaining tabs.

14. Click the **Compliance** tab.

- From the **List of Values**, choose the **Indirect Cost Schedule**.
- The **Indirect Cost Rate Fixed Date** is optional.
- Choose from the List of Values an **Allowed Cost Schedule**.
- Choose from the List of Values the **Billing Distribution Rule**.
- Choose from the List of Values the **Revenue Distribution Rule**.
- Choose from the List of Values the **Billing Cycle**.
- Choose from the List of Values the **Billing Terms**.
- **First Billing Offset Days** default to 0.



14. Click **File> Save** or click the **Save icon**.

15. Click the **Billing Format** button.

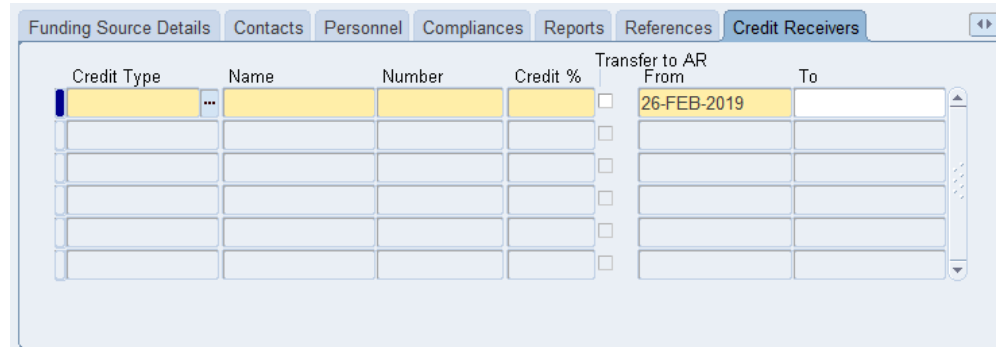
Labor and Non-Labor invoice format fields are pre-populated.
All other fields are optional.

16. Click the **Close** button to return to the Award Management form.

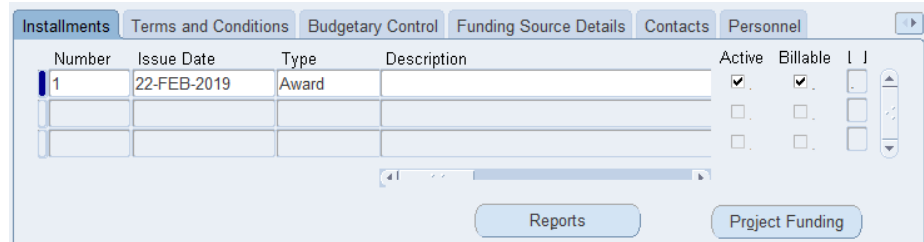
The screenshot shows a window titled "Billing Format" with the following elements:

- Labor Invoice Format**: Summarized Labor
- Non-Labor Invoice Format**: Summarized Nonlabor
- Radio button options:
 - No Print
 - Print Invoice
 - Electronic Data Interfa...
 - Transaction Number: [text box]
 - Letter of Credit Drawdown
 - LOC Account: [text box]
 - LOC Address: [button]
 - LOC Contact: [button]
 - Agency Specific Form
 - Form Name: 2 - RF Fixed Price Invoice

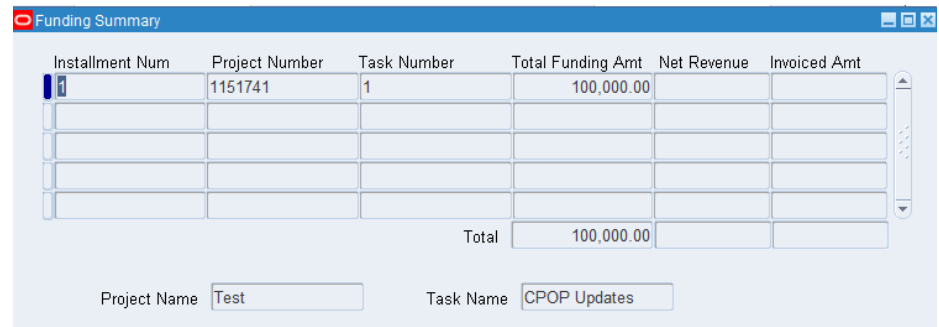
17. The **Reports** tab is available if you want to run reports at specific intervals. The **References** tab and **Credit Receivers** tab are optional.



18. Return to the **Installments** tab and click on the **Project Funding** button. The **Funding Summary** block displays. This is a read-only form for you to review.



19. Click the **Close** button to return to the Award Management form.



20. At the **Award Management** form, click the **Flexfield** to open the Award Management DFF form.

- Review the List of Values to populate the **NACUBO** field.
- Select where the activity will be conducted from the List of Values.
- Select the Property Title from the List of Values.
- The Closure Date is optional.
- Choose from L, M, or N for the **IDC Calc Period**.
- Choose from the List of Values for the **Invoice Certification field**.
- Enter an **Override Rate**.
- Enter the **Prime Funding Source**.
- Enter the **CFDA Number** from the List of Values.
- Enter the **Interest Income** from the List of Values.
- Enter the **Cost Sharing/Matching Information** from the List of Values.
- The American Recovery and E-Verify fields are optional.
- Choose the **Classification of Instructional Programs** from the List of Values.

The image shows two screenshots from a software application. The top screenshot is titled "Award Management - ORG Account Establishment Administrator @ TRAINX - 26-FEB-2019". It displays a form with the following fields and values:

Operating Unit	The Research Foundatio	<input type="checkbox"/> Template	Funding Source Name	Center for Problem Oner
Number	83700		Funding Source Award Number	N/A
Short Name	Test		Pre-Award Date	
Full Name	TEst		End Date	31-DEC-2019
Start Date	01-JUN-2006		Award Type	Federal Flow Through
Close Date	22-MAY-2020		Status	Active
Purpose	Grant	<input type="checkbox"/> Revenue Hard Limit	Funded Amount	100,000.00
Organization	010 Professional Develo	<input type="checkbox"/> Invoice Hard Limit		
Award Amount	100,000.00			

A red circle highlights a "[PL]" icon in the bottom right corner of this window.

The bottom screenshot is titled "Awards Descriptive Flexfield". It displays a form with the following fields and values:

NACUBO	Public Services
On/Off Campus	On On
Property Title	RF: RF Federally Funded Equipment
Closure Date	
IDC Calc Period	L
Invoice Certification	010-ALB-Standard
Override Rate	20.00
IDC Rate Type	
Funding Type	
Disencumber IDC	
Prime Funding Source	US Department of Justice
CFDA Number	16.710 Public Safety Partnership and Community Polici
Cost Sharing/Matching Information	None No Cr
Interest Income	No Requirement to Report or Pay Interest
American Recovery and Reinvestment Act Funding	No
American Recovery and Reinvestment Act Funding Amount	0.00
Subject to E-Verify Rule	No
Classification of Instructional Programs - CIP Code	99.9999-To Be Determined
PACS Proposal Number	N/A

Buttons for "OK", "Cancel", "Clear", and "Help" are visible at the bottom of the window.

21. Click **File> Save** or click the Save icon.