Managing Award Projects

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>General Information</strong> page.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Grants</strong> link.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Project</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>Enter the desired information into the <strong>Business Unit</strong> field. Enter a valid value e.g. &quot;EGV03&quot;.</td>
</tr>
<tr>
<td>4.</td>
<td>Click in the <strong>Project</strong> field.</td>
</tr>
<tr>
<td>5.</td>
<td>Enter the desired information into the <strong>Project</strong> field. Enter a valid value e.g. &quot;METAB_STUDY 01&quot;.</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>Correct History</strong> option.</td>
</tr>
<tr>
<td>7.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>8.</td>
<td>Use the <strong>General Information</strong> page to define basic information for the project.</td>
</tr>
<tr>
<td>9.</td>
<td>Select the <strong>Program</strong> check box to designate this project as a program or summary project. When this option is selected, the system prevents you from adding activities to the program, because only projects can have activities. If you try to select this option for a project that already has activities, a message appears indicating that the project cannot be changed to a program because it has activities associated with it, and you must either remove the activities from the existing project or create a new program. After you convert a project to a program by selecting this option and saving your changes, the project ID of this program is available in various program and parent project ID prompt list fields that appear on pages throughout the Program Management system.</td>
</tr>
<tr>
<td>10.</td>
<td>Use the <strong>Integration</strong> field to enter the integration template that is used to integrate this project with other financial applications.</td>
</tr>
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| 11.  | Use the **Project Type** field to enter a project type. Use project types to:  
  • Group similar projects for reporting and analysis.  
  • Determine the default rate plan for the project. When you create a new project and specify the project type, the system automatically populates the **Default Rate Template** field in the **Project Definitions - Rates** page with the default rate template that is associated with the project type for the business unit.  
  • Determine whether to use project type status path. The system controls the project status progression based on the custom project status path that is associated with the project type for the business unit.  
  
  Click in the **Project Type** field. |
| 12.  | Enter the desired information into the **Project Type** field. Enter a valid value e.g. "R&D". |
| 13.  | The **Percent Complete** field displays the percentage of the project completed based on calculation method that you define on the **Project Costing Definition** page. If you select Manual in the **Calculation Method** field on the **Project Costing Definition** page, you can enter a value in the **Percent Complete** field on this page. If you select a calculation method of Amounts, Duration, or Units, the system automatically calculates and displays the percent complete value. |
| 14.  | Use the **Calculate** field to select: Start Date, End Date, or Duration in Days to specify which one of these three fields is calculated by the system based on the values that you enter for the other fields.  
  
  For example, select End Date for the system to calculate the end date based on the values that you enter for start date and duration.  
  
  The default value is based on the project calculation method on the **Program Management Options** page for the business unit. This field is available only if you use Program Management. |
<p>| 15.  | Click the <strong>Project Department</strong> tab. |
| 16.  | Use the <strong>Project Department</strong> page to define the primary department that is responsible for the project. |
| 17.  | Use the <strong>Department Info</strong> grid to maintain F&amp;A offset information such as the department, subdivision, and percentage pledged of the project F&amp;A costs that should be distributed to each department. The F&amp;A process uses the departments in this group box to retrieve offset ChartField information from the <strong>F&amp;A Offset</strong> page. |
| 18.  | Click the <strong>Project Costing Definition</strong> tab. |
| 19.  | Use the <strong>Project Costing Definition</strong> page to define a project. |</p>
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<td>20.</td>
<td>Use the <strong>FS_08 SetID</strong> field to enter a setID in cases where multiple project business units relate to the same general ledger business unit. Because a general ledger business unit can relate to only one setID or project business unit combination, the <strong>FS_08 SetID</strong> field enables you to associate the setID that the general ledger business unit is using in the FS_08 record group. If you use an integration template that relates the general ledger business unit to a different setID, the <strong>FS_08 SetID</strong> field changes to the correct setID value that is used in the FS_08 record group.</td>
</tr>
<tr>
<td>21.</td>
<td>Click the <strong>Project Tree...</strong> link to access the <strong>Assign To Project Tree</strong> page, where you can add the project to a project tree.</td>
</tr>
<tr>
<td>22.</td>
<td>Use the <strong>Enforce Team</strong> group box to designate who can charge time and expenses to a project or activity. These options are available for selection at the project level if you selected the <strong>Decide at the Project Level</strong> option on the <strong>Project Costing Options</strong> page for the business unit.</td>
</tr>
</tbody>
</table>
| 23.  | Use the **Calculation Method** field to select a method to calculate the percent complete component. The default value is based on the business unit. Available methods are:  
- **Amounts**: Bases the calculation on budgeted and actual amounts.  
- **Duration**: This option is available only if you use Program Management. Bases the calculation on the number of days allotted to complete the activity.  
- **Manual**: Bases the calculation on manual entry of percent complete.  
- **Units**: Bases the calculation on the number of hours that are allotted to complete the activity. |
| 24.  | Use the **Summary Method** field to select a method that the system uses to roll up activity completion percentages to the project. The default value is based on the business unit. Available methods are:  
- **None**: The system does not summarize the percent complete value. The **None** option is available if you select the Manual calculation method.  
- **Straight-Line**: The system adds all individual percent complete values for the project, and divides that amount by the total number of activities.  
- **Weighted**: The system adds the actual amounts, duration, or units for all activities, and divides that amount by the total budgeted value for the project. The **Weighted** option is available if you select a calculation method of Amounts, Duration, or Units. |
| 25.  | Use the **Grants Project** field to select GM Object if the project is a Grants project. Select PC Object if the project originated in Project Costing. You need to differentiate between Project Costing related projects and Grants related projects for processing to occur correctly. |
| 26.  | Select the **Project Primary Flag** check box if the project is primary. Grants requires primary projects. |
| 27.  | The system uses the **Currency Code** and **Rate Type** that you define in the **Project Currency** group box when you review transactions online through the **Transaction List** page. The value in the **Project Amount** field on the **Transaction Detail** page is not stored in Project Costing tables. It is calculated each time that you access the page. |
## Job Aid

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<tr>
<td>28.</td>
<td>Default values for the fields in the <strong>Analysis Group Options</strong> group box are based on the <strong>Installation Options - Project Costing</strong> page. You can override the default values for the project.</td>
</tr>
<tr>
<td>29.</td>
<td>Click the <strong>Manager</strong> tab.</td>
</tr>
<tr>
<td>30.</td>
<td>Use the <strong>Manager</strong> page to view project manager data.</td>
</tr>
<tr>
<td>31.</td>
<td>Click the <strong>Location</strong> tab.</td>
</tr>
<tr>
<td>32.</td>
<td>Use the <strong>Location</strong> page to assign the project's physical location.</td>
</tr>
<tr>
<td>33.</td>
<td>Click the <strong>Phases</strong> tab.</td>
</tr>
<tr>
<td>34.</td>
<td>Use the <strong>Phases</strong> page to track the time that is spent on different stages of a project. Use for exception reporting to see which projects are on schedule. Set actual phases, estimated phases, or both.</td>
</tr>
<tr>
<td>35.</td>
<td>Use the <strong>Phase Type</strong> field to enter a phase type to track the time spent on different stages of a project and, for exception reporting, to view the projects that are on schedule. Click in the <strong>Phase Type</strong> field.</td>
</tr>
<tr>
<td>36.</td>
<td>Enter the desired information into the <strong>Phase Type</strong> field. Enter a valid value e.g. &quot;PLAN&quot;.</td>
</tr>
<tr>
<td>37.</td>
<td>Click in the <strong>Description</strong> field.</td>
</tr>
<tr>
<td>38.</td>
<td>Enter the desired information into the <strong>Description</strong> field. Enter a valid value e.g. &quot;Planning and Preparation&quot;.</td>
</tr>
<tr>
<td>39.</td>
<td>Click in the <strong>From Date</strong> field.</td>
</tr>
<tr>
<td>40.</td>
<td>Enter the desired information into the <strong>From Date</strong> field. Enter a valid value e.g. &quot;07012007&quot;.</td>
</tr>
<tr>
<td>41.</td>
<td>Click in the <strong>Through Date</strong> field.</td>
</tr>
<tr>
<td>42.</td>
<td>Enter the desired information into the <strong>Through Date</strong> field. Enter a valid value e.g. &quot;07152007&quot;.</td>
</tr>
<tr>
<td>43.</td>
<td>Click the <strong>Add Row</strong> button.</td>
</tr>
<tr>
<td>44.</td>
<td>Enter the desired information into the <strong>Phase Type</strong> field. Enter a valid value e.g. &quot;PURCH&quot;.</td>
</tr>
<tr>
<td>45.</td>
<td>Click in the <strong>Description</strong> field.</td>
</tr>
<tr>
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<tr>
<td>46.</td>
<td>Enter the desired information into the <strong>Description</strong> field. Enter a valid value e.g. &quot;Equipment purchase&quot;.</td>
</tr>
<tr>
<td>47.</td>
<td>Click in the <strong>From Date</strong> field.</td>
</tr>
<tr>
<td>48.</td>
<td>Enter the desired information into the <strong>From Date</strong> field. Enter a valid value e.g. &quot;07162007&quot;.</td>
</tr>
<tr>
<td>49.</td>
<td>Click in the <strong>Through Date</strong> field.</td>
</tr>
<tr>
<td>50.</td>
<td>Enter the desired information into the <strong>Through Date</strong> field. Enter a valid value e.g. &quot;07212007&quot;.</td>
</tr>
<tr>
<td>51.</td>
<td>Click the <strong>Add Row</strong> button.</td>
</tr>
<tr>
<td>52.</td>
<td>To save you time, the third phase has been added for you.</td>
</tr>
<tr>
<td>53.</td>
<td>Click the <strong>Show following tabs</strong> button.</td>
</tr>
<tr>
<td>54.</td>
<td>Click the <strong>Approval</strong> tab.</td>
</tr>
<tr>
<td>55.</td>
<td>Use the <strong>Approval</strong> page to enter project events for which you want to require an approval and define the order in which the approvals for this project must be carried out.</td>
</tr>
<tr>
<td>56.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td>57.</td>
<td>You have successfully completed project information for an award. <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>