

Add University Restricted Accounts (AURA)

The **Add University Restricted Accounts (AURA) form** is used by either the Research Coordinator or the Financial Officer when a new restricted account number (budget and fund combination) needs to be added to the IBIS database.

This document contains the following sections:

I. Introduction to the AURA Form

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- Contract Payor Inquiry Screen (IPYR)
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- Update Deliverable & Project Investigator Screen (UDPI)

> **Note:**

The sections of this document marked with an asterisk (*) are individual web documents. If you would like to print a hard copy of the complete AURA documentation, you will need to print each document separately. Please be aware that the AURA documentation, when printed, will be approximately 50 - 55 pages depending on your printer settings.

I. Introduction of the AURA Form

Introduction

The **AURA** form will be initiated by the department Research Coordinator or Financial Officer when a new restricted account number (budget/fund number) needs to be added to the IBIS database. The

department can use an existing account to clone a new account with similar attributes.

AURA will require the approvals of the appropriate department officials (the Financial Officer and/or Research Coordinator) and Research Accounting (central office).

AURA will allow the option to request an advanced fund number when a contract is pending contractual approval. The advanced fund number will allow the department to budget the anticipated funds prior to actually having a signed contract on file. In this circumstance, however, the department accepts full responsibility for any expended monies if the funding does not materialize.

Structure of AURA

The **AURA** form contains eight pages plus a cover screen. When a department initiates the form, the user will be required to fill in the cover screen and certain fields on Pages 1 through 3 and will be given the opportunity to complete the Notepad on Page 9. After the form is routed through the department approvals and has reached the central desk, all eight pages and the cover screen will appear for Research Accounting's review and completion.

> Note:

As an added feature, the **Form Action** and Next **Approver** fields will be available on every page of the form.

How to Pull Up a Blank Form

To pull up a blank **AURA** form:

- Select **CCOM** from the **Net-Pass Activity Table** to go into the production environment.
- Select **IBIS Admin Menus** at the **Com-Pass** screen.

05/11/00
11:21:26.4

INTEGRATED BUSINESS INFORMATION SYSTEM

M1M1
JWD1

Any of the functions included in this system can be invoked by entering the corresponding function code on the command line next to 'NEXT FUNCTION:'. The following functions are available:

FUNCTION	DESCRIPTION	FUNCTION	DESCRIPTION
FORM	Help Selecting HRS Forms	M2PI	Property Inventory
M2AH	IBIS Adhoc Functions	M2PR	Purchasing System
M2AS	EASY Elec. Appr. System	M2VA	Vendor System
M2BG	Budgeting System	BAMM	Budget Planning: BudAuto
M2FN	Financial System	M2IM	Inventory Management
M2FS	Facilities System	CODE	Codeset Maint. System
M2HR	Human Resources System	M2NC	Nat Conn. Applications
M2PA	Payroll System	M2PE	Pay & Effort Functions

NEXT FUNCTION: AURA **1** PREV MENU: NONE
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP MENU CMPS END KEYS PRNT . |

1. At **Next Function**, type **AURA**.

Press **Enter**. A blank **AURA** form will appear, ready to be completed.

> Note:

To locate the form within the IBIS menus, follow the steps listed below:

- At the **Next Function** line on **M1M1** (IBIS Main Menu), enter **M2AS** (EASY Electronic Approval System); press **Enter**.
- At the **Next Function** line on **M2AS**, enter **M3FM** (EASY forms); press **Enter**.
- At the **Next Function** line on **M3FM**, enter **M4FI** (Financial); press **Enter**.
- At the **Next Function** line on **M4FI**, enter **AURA** to pull up a blank form; press **Enter**.

II. Locating the Financial Accounting Maintenance System

To locate the **Financial Accounting Maintenance System** through the IBIS menus, follow the steps listed below:

05/11/00
11:30:34.6

INTEGRATED BUSINESS INFORMATION SYSTEM

M1M1
JWD1

Any of the functions included in this system can be invoked by entering the corresponding function code on the command line next to 'NEXT FUNCTION:'. The following functions are available:

FUNCTION	DESCRIPTION	FUNCTION	DESCRIPTION
FORM	Help Selecting HRS Forms	M2PI	Property Inventory
M2AH	IBIS Adhoc Functions	M2PR	Purchasing System
M2AS	EASY Elec. Appr. System	M2VA	Vendor System
M2BG	Budgeting System	BAMM	Budget Planning: BudAuto
M2FN	Financial System	M2IM	Inventory Management
M2FS	Facilities System	CODE	Codeset Maint. System
M2HR	Human Resources System	M2NC	Nat Conn. Applications
M2PA	Payroll System	M2PE	Pay & Effort Functions

NEXT FUNCTION: M2FN **PREV MENU:** NONE

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP MENU CMPS END KEYS PRINT .

1. At **Next Function** on the **M1M1** screen (IBIS Main Menu), type **M2FN**.

Press **Enter**.

05/11/00
11:27:24.9

INTEGRATED BUSINESS INFORMATION SYSTEM
FINANCIAL MAINTENANCE SYSTEM

M2FN
JWD1

Any of the functions included in this system can be invoked by entering the corresponding function code on the command line next to 'NEXT FUNCTION:'. The following functions are available:

FUNCTION	DESCRIPTION	FUNCTION	DESCRIPTION
M3AF	Accounts and Funds System	M3CL	Client/Server Functions
M3AS	Agency/Subagency System	M3FM	EASY Forms
M3CT	Contract Info System	M3FR	Financial Online Rept
M3MF	Misc Financial Functions	M3FS	Fin Structure/Post
M3GE	Gifts/Endows and Annuities	M3MT	Struct Maint/Carryover
M3SP	Special Projects System		

NEXT FUNCTION: _____ **PREV MENU:** M1M1

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP MENU CMPS END KEYS PRINT .

The **M2FN** (Financial Maintenance System) menu contains the **Financial Accounting Maintenance**

System functions that you can access to locate the different browse, inquiry and update screens and forms.

Additional AURA Documentation:

- Use of the AURA Form without a Clone
- Use of the AURA Form with a Clone
- Accounts and Fund System Screens
- Agency/Subagency System Screens
- Contract Information System Screens

Last Revised: 10/27/2003

AURA: Use of the AURA Form Without a Clone

This document contains the following information:

III. Use of the AURA Form Without a Clone

- [AURA Cover Screen](#)
- [Fund and Rates Information Screen — Page 1](#)
- [Account and Project Information Screen — Page 2](#)
- [Indicators and Reports Screen — Page 3](#)
- [Principle Investigator Screen — Page 8](#)
- [Research Incentive Distribution — Page 9](#)
- [Notepad Area Screen — Page 10](#)

AURA Cover Screen

IBIS FINANCIAL MAINTENANCE SYSTEM
ADD UNIVERSITY RESTRICTED ACCOUNT

COVER AURA
CONFIDENTIAL: Y
DOCUMENT STATUS:

FORM ACTION: 1
NEXT APPROVER: 3
DOCUMENT#: UNIT:
EFF DATE: 05 / 12 / 2000

KEY INFORMATION

Add New Account Number Below:

Budget: ___ - 4 - ___ UP
Fund: 5
Account Name: 6
Sponsor/Agency Code: 7
Acct Begin Date: 8 / ___ / ___ Acct End Date: 9 / ___ / ___

If Clone, Acct from which to clone:
Acct#: ___ - 10 - ___ UP

Where will the project work be completed? Select one and mark with X:
11 On Campus 11 Off Campus 11 Both on and off Campus

TO DEFAULT NEW FORM DATA: complete cover screen and press 'PF8'
TO PAGE NEW FORM WITHOUT DEFAULTS: press 'PF8'

NEXT FUNCTION: _____ (MENU, KEYS, END)

1. At **Form Action**, enter **ADD**.
2. At **Confidential**, the **N** can be changed to a **Y**.

3. At **Next Approver**, you can enter a user id of the person to approve the form if the next approver is not the default approver on the approval path.
4. At **Budget**, enter the appropriate budget number for the new restricted account.
5. At **Fund**, enter the fund number if known by the department.

> Note:

If the fund number is not known, Research Accounting will enter the fund number when the form reaches the central desk.

6. At **Fund Name**, enter the name of the fund.
7. At **Sponsor/Agency Code**, enter the 10 position agency code of the Sponsoring Agency on the agreement.

> Notes:

- If you do not know the Sponsor/Agency Code, press **PF1** for help in locating the correct code.
- If you cannot locate the correct code, contact Research Accounting to have the Agency Code added to the system.

8. At **Acct Begin Date**, enter the date the account begins.
9. At **Acct End Date**, enter the date the account ends.
10. Leave **Acct #** blank if you do not want to clone an existing account. If you want to clone a previous restricted account, please go to the section of this document titled [Use of the AURA Form with a Clone](#) to continue.

> Note:

Cloning allows the department to use an existing account with similar attributes as a template for the new restricted account that is being created. All fields, except those with dollar amounts, will be primed. The user may keep the information that is primed or the information can be changed to fit the specifications for the new account.

11. At **Where will the project work be completed?**, place an **X** beside one of the categories listed.

> **Note:**

This will system generate the appropriate indirect cost rate on page 1.

Press **PF8** to continue to the next page.

Fund and Rates Information Screen — Page 1

```

                                ADD UNIVERSITY RESTRICTED FUND                                PAGE 1 OF 9
                                FUND AND RATES INFORMATION                                AURA
FORM ACTION:  _____ DOCUMENT#: _____ UNIT: _____ CONFIDENTIAL: Y
NEXT APPROVER: _____ EFF DATE: 05 / 12 / 2000 DOCUMENT STATUS:
ACCT#:  - - - UP ADMIN AREA#: _____
ACCT: _____ BUDG: _____
SPON/AGY: _____

=====FUND=====
FUND NAME:  1 _____ ADV FND(Y/N)?  2
FUND BEG:  __ /  3  /  _____ CONTR FND#:  4
FUND END:  __ /  5  /  _____ FUND TYPE:
PRECAST:  __ /  6  /  _____ PRECAST AMT:  7 FUND CAT:

=====RATES AND CODES=====
FRINGE BENEFITS: _____ FRINGE CODE: _____ COST SHARING RATE:  8
ACAD:  9 _____ N-ACAD:  10 _____ MGMT FEE RATE:  11
WAGE:  12 _____ GRAD:  13 _____ STUDENT: _____ CFDA NUMB: _____
INDIRECT COSTS: _____ INDCOST CODE: _____ CAMPUS CODE: _____
IND RATE:  14 . 0 CAP:  15 . 0 ARL RATE:  16 . 0 INDCOST TYPE:  17
GOVT USE:  18 . 0 PRIME:  19 . 0 PRIME CREDIT ACCT:  20 - - - -
ARL ADMIN FEE: _____

NEXT FUNCTION:  _____ <MENU,KEYS,END>

```

1. The **Fund Name** is system generated based on the fund name entered on the cover page.

2. At **Adv Fund**, enter **N** (no) *or* **Y** (yes) if this is an advanced number.

> **Note:**

If **Y** is entered, a fund number will be assigned prior to the signed contractual commitment. The college accepts full responsibility for all expenditures in the event that the funding is not granted.

3. At **Fund Beg**, enter the date the fund begins if it is different than the **Acct Begin Date**.

4. At **Contr Fnd#**, enter the first fund number assigned to the contract.

> **Notes:**

- If this is a new agreement, the **Contr Fnd#** will be the fund number of the account being created.
- If the new account is a continuation of a long-term contract, the **Contr Fnd#** will be the very first number for that contract and the corresponding information for that contract can be primed.
- If a continuing contract had numerous funds before the start of IBIS in May 1993, the contract fund number is the earliest open fund number.

5. At **Fund End**, enter the date the fund ends if it is different than the **Acct End Date**.

6. At **Precost**, enter the date spending is permitted to begin prior to the actual begin date if precost spending is stipulated in the contract.

> Note:

The date entered here must be earlier than the date entered in **Fund Beg**.

7. At **Precost Amt**, enter the amount of spending which is permitted to be expended in the period between **Precost** date and the **Fund Beg** date.

8. At **Cost Sharing Rate**, enter the rate of cost sharing.

9. At **Acad**, enter the rate of fringe benefits for Academics.

> Note:

Current year rates will be defaulted.

10. At **N-Acad**, enter rate of fringe benefits for Non-Academics.

> Note:

Current year rates will be defaulted.

11. At **Mgmt Fee Rate**, enter the rate of direct costs which can be charged to pay the University for administering the agreement.

12. At **Wage**, enter the rates of fringe benefits for Wage employees.

> Note:

Current year rates will be defaulted.

13. At **Grad**, enter the rates of fringe benefits for Graduate Assistants.

> Note:

Current year rates will be defaulted.

14. At **Rate**, enter the rate of indirect costs.

> Note:

The current year rates will be defaulted according to the budget number entered previously with rates for ARL, Hershey, All University-Research, All University-Instruction or Off-Campus being the possible defaults.

15. At **Cap**, enter the ceiling rate of indirect costs if any were set by the contract guidelines.

16. **ARL Rate** is an additional indirect costs rate charged on ARL contracts.

> Note:

The amount is debited to the contract account and credited to an ARL Expense Account.

17. **Indcost Type** indicates which type of calculation will be performed to determine the amount of indirect costs charged (i.e., REGular, PRIME, ON/OFF, ARL, ARLPR, etc.).

Prime	is an indirect cost percentage that the sponsor is willing to pay over and above the negotiated approved indirect cost rate.
ARL	is the negotiated approved rate for any indirect cost calculation except for those listed above.
On/Off	is for any research projects in which part of the research is done on-campus and off-campus.
Regular	is used for any indirect cost calculation except for those listed above.
ARLPR	is an indirect cost percentage that the sponsor is willing to pay over and above the negotiated/approved indirect ARL rate.

18. **Govt Use** is the rate which the government charges for non-government sponsors to use equipment in the Applied Research Laboratory.

19. **Prime** is an inflated indirect costs rate.

> Note:

The **difference** between the rate keyed in this field and the rate keyed in the **Indirect Costs Rate**

is credited to a separate account (the PRIME CREDIT ACCT below).

20. **Prime Credit Acct** is the account to which the **Prime** difference is credited.

Press **PF8** to continue.

> Note:

All other fields on this page are completed by Research Accounting.

Account and Project Information Screen — Page 2

```

                                ADD UNIVERSITY RESTRICTED FUND
                                ACCOUNT AND PROJECT INFORMATION
                                PAGE 2 OF 9
                                AURA
FORM ACTION:  _____  DOCUMENT#:  _____  UNIT:  _____  CONFIDENTIAL: Y
NEXT APPROVER: _____  EFF DATE: 05 / 12 / 2000  DOCUMENT STATUS:
ACCT#:  - - - - -  UP  ADMIN AREA#:
ACCT:  _____  BUDG:
SPON/AGY:
=====PROJECTS=====
PROJ BEGIN:  1 / 3 / _____  PROJ END:  2 / 4 / _____
PROJ EST AMT:  _____  PROJECT NO#:  _____
PROJ CORR SSN:  5 - - - - -  ACCESS ID:  _____  CREATE PROFILE(Y/N)? Y 6
PROJ CORR:  _____  IS PROJ CORR A P.I.(Y/N)? Y 7
PROJ TITLE:  8 _____
=====ACCOUNT (BUDGET/FUND)=====
ACCT NAME:  9 _____  ACCT BEGIN:  / /
ACCT AWD AMT:  10 _____  BEN FRANKLIN#:  11 _____  ACCT END:  / /
NEXT FUNCTION:  _____  (MENU,KEYS,END)

```

1. At **Proj Begin**, enter the date the project begins if different than the Acct Begin Date.
2. At **Proj End**, enter the date the project ends if different than the Acct End Date.
3. At **Proj Est Amt**, enter the estimated amount of the project.

> Note:

This field usually applies to long-term projects.

4. At **Proj No#**, enter the project number.

> **Notes:**

- If this is a new agreement, the **Proj No#** will be the number of the account being created.
- If the new account is a continuation of a long term contract, the **Proj No#** will be the very first number for that contract and the corresponding information for that contract will be primed. However, if a continuing contract had numerous funds before May 1993, the **Proj No#** is the earliest open number.

5. At **Proj Corr SSN**, enter the social security number of the project correspondent.

> **Note:**

This is the person who should be contacted for information on the project.

6. **Create Profile?**, indicate whether the Project Correspondent should (Y) or should not (N) be given security access to the account and its cost centers (if applicable) on Web FIT.

7. At **Is Proj Corr A P.I.?**, indicate whether the project correspondent is a project investigator by entering a **Y** (yes) *or* **N** (no).

> **Note:**

The field will default to **Y** (yes).

8. At **Proj Title**, enter the full title of the project.

9. At **Acct Name**, enter the name of the account.

10. At **Acct Awd Amt**, enter the award amount for the account.

11. At **Ben Franklin #**, enter the assigned Ben Franklin number.

Press **PF8** to continue.

ADD UNIVERSITY RESTRICTED FUND

PAGE 3 OF 9
AURA

INDICATORS AND REPORTS INFORMATION

FORM ACTION: _____ DOCUMENT#: _____ UNIT: _____ CONFIDENTIAL: Y
NEXT APPROVER: _____ EFF DATE: 05 / 12 / 2000 DOCUMENT STATUS:
ACCT#: - - UP ADMIN AREA#: _____
ACCT: _____ BUDG: _____
SPON/AGY: _____

=====INDICATORS=====

MINORITY PLAN (Y/N)? **1** EXPEND ACCT (Y/N)? Y SUB-CONTRACTS (Y/N)? **2**
CLOSING FORMS (Y/N)? - MATCHING REQUIRED (Y/N)? **3**
IS THIS ACCT USED TO MATCH ANOTHER(Y/N)? N **4** Y, ACCT: **5** - - - UP _____
IS FRINGE CHARGED TO ANOTHER ACCT (Y/N)? **6** IF Y, ACCT: - - **7** - - UP _____
IS TUITION CHARGED TO ANOTHER ACCT(Y/N)? **8** IF Y, ACCT: - - - - **9** UP _____

=====REPORT FREQUENCY=====

EST DEL DUE DATE: **10** / - / - FISC REPORT FREQ: _____ INV FREQ: _____
FISC REPORT TYPE: _____ INV TYPE: _____
FISC REPORT MONTH: _____ INV MONTH: _____
SUPPL OFF INIT: **11**

NEXT FUNCTION: _____ <MENU,KEYS,END>

1. At **Minority Plan**, indicate whether a minority plan has been set up for the purchasing of materials on this account by entering a **Y** (yes) or **N** (no).
2. At **Sub-Contracts**, indicate whether a subcontract exists for this project by entering a **Y** (yes) or **N** (no).
3. At **Matching Required**, indicate if a match is required by entering a **Y** (yes) or **N** (no).
4. At **Is This Acct Used to Match Another?**, indicate whether the account being added will be used to match another account by entering a **Y** (yes) or **N** (no).
5. At **If Y, Acct:**, enter the account number which is matched by the account being added if a **Y** was entered in the **Is This Acct Used to Match Another?** field.
6. At **Is Fringe Charged to Another Acct?**, indicate whether the fringe benefits associated with this account will be charged to an alternate account by entering a **Y** (yes) or **N** (no).
7. At **If Y, Acct:**, enter the account number being used to charge fringe benefits if a **Y** was entered in the **Is Fringe Charged to Another Acct?** field.
8. At **Is Tuition Charged to Another Acct?**, indicate whether the tuition associated with this account will be charged to an alternate account by entering a **Y** (yes) or **N** (no).

9. At **If Y, Acct:**, enter the account number being used to charge tuition if a **Y** was entered in the **Is Tuition Charged to Another Acct?** field.
10. At **Est Del Due Date**, enter the estimated date the first deliverable is due.
11. At **Suppl Off Init**, enter the initial of the Supplemental Administrative Officer to whom reports will be routed.

Press **PF6** to go to the Notepad.

> Note:

All other fields and pages will be completed by Research Accounting.

Principle Investigator — Page 8

P.I.:	LAST NAME	FI	MI	SOC SEC NUMBER	ACCESS ID	PROFILE(Y/N)
			1	— — —		2 N
				— — —		N
				— — —		N
				— — —		N
				— — —		N
				— — —		N
				— — —		N

FORM ACTION: _____ DOCUMENT#: _____ UNIT: _____ CONFIDENTIAL: Y
NEXT APPROVER: _____ EFF DATE: 05 / 12 / 2000 STATUS:
ACCT#: - - UP ADMIN AREA#: _____
ACCT: _____ BUDG: _____
SPON/AGY: _____

ADD UNIVERSITY RESTRICTED FUND PAGE 8 OF 9
PRINCIPLE INVESTIGATOR AURA

Last Action:
Last Action Name:
NEXT FUNCTION: _____ (MENU, KEYS, END)

1. **Soc Sec Number** — enter the Social Security Number(s) of all principal investigator(s) on project (maximum of 8).
2. **Access ID Profile** — indicate whether the principal investigator(s) should (Y) or should not (N) be given security access to the account and its cost centers (if applicable) on Web FIT.

Research Incentive Distribution — Page 9

```
ADD UNIVERSITY RESTRICTED FUND                                PAGE 9 OF 10
RESEARCH INCENTIVE DISTRIBUTION                                AURA
FORM ACTION: _____ DOCUMENT#: _____ UNIT: _____ CONFIDENTIAL: Y
NEXT APPROVER: _____ EFF DATE: 04 / 19 / 2001 ADMIN AREA#: _____ STATUS:
ACCT#: _____ UP SPON/AGY: _____
ACCT: _____ BUDG: _____
===== RESEARCH CATEGORIES =====
SSN 1 P. I. LAST NAME FI MI 2 _____ TOTAL
_____._____._____
_____._____._____
_____._____._____
_____._____._____
_____._____._____
_____._____._____
_____._____._____
_____._____._____
_____._____._____
_____._____._____
TOTAL
Last Action:
Last Action Name:
NEXT FUNCTION: _____ (MENU, KEYS, END)
```

New page (page 9) was added. This page contains information for creating a new research incentive distribution record for an account at a time when account is created on AURA form.

After research incentive distribution record is created on AURA form, it can be updated/displayed with URID/IRID functions.

1. Principle investigator's (PI's) SSN entered on page 8 would be automatically inputted on page 9.

Only SSN of the University employee can be used on this form; the same SSN cannot be used more than once.

Proceed the same way with the rest of the PIs participating in the project. PI(s) can be entered even if his/hers incentive distribution for this project is 0%.

2. PF1 key on the category field can be used to bring a list of research categories available.

All research categories should be valid, the same category cannot be entered more than once, and the maximum number of categories for one account on AURA form can be 3 categories. If there

is more than 3 categories needed for an account, more categories can be entered through URID function. Total of 6 categories is allowed for one account.

After all categories are selected or entered on the screen, input SSN(s) of the PI(s) (other than the ones already there from page 8) and percent(s) of incentive distribution for this person(s).

If you don't know which category to select, but need to process AURA form, use NA category and 100% for project corresponded SSN. Later this information can be changed.

After all information is filled on the screen, press PF12 key. Names would be inputted automatically, and totals by category and by SSN will be calculated.

Total should always be equal 100%.

Notepad Area Screen — Page 10

```
ADD UNIVERSITY RESTRICTED FUND                                PAGE 10 OF 10
NOTEPAD AREA                                                AURA
FORM ACTION: _____ DOCUMENT#: _____ UNIT: _____ CONFIDENTIAL: Y
NEXT APPROVER: _____ EFF DATE: 04 / 19 / 2001          STATUS:
ACCT#: - - UP ADMIN AREA#:
ACCT: BUDG:
SPON/AGY:
=====
NOTE PAD AREA: 1
                _____
                _____
                _____
                _____
Last Action:
Last Action Name:
NEXT FUNCTION: (MENU, KEYS, END)
```

1. Enter comments in the **Notepad**, if desired.

Press **PF12** to **ADD** the form.

Enter **SUB** at **Form Action** and press **PF12** to submit the form through the approval path.

Additional AURA Documentation

- Introduction to the AURA Form
- Locating the Financial Accounting Maintenance System
- Use of the AURA Form with a Clone
- Accounts and Fund System Screens
- Agency/Subagency System Screens
- Contract Information System Screens

Last Revised: 10/27/2003

AURA: Use of the AURA Form With a Clone

This document contains the following information:

- **IV. Use of the AURA Form With a Clone**
 - [AURA Cover Screen](#)
 - [Fund and Rates Information Screen — Page 1](#)
 - [Account and Project Information Screen — Page 2](#)
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AURA Cover Screen

IBIS FINANCIAL MAINTENANCE SYSTEM
ADD UNIVERSITY RESTRICTED ACCOUNT

COVER AURA
CONFIDENTIAL: Y
DOCUMENT STATUS:

FORM ACTION: 1
NEXT APPROVER: 3
DOCUMENT#: UNIT:
EFF DATE: 05 / 12 / 2000
KEY INFORMATION

Add New Account Number Below:

Budget: ___ - 4 - ___ UP
Fund: 5
Account Name: _____ 6
Sponsor/Agency Code: _____ 7
Acct Begin Date: 8 / ___ / ___ Acct End Date: 9 / ___ / ___

If Clone, Acct from which to clone:
Acct#: ___ - ___ 10 ___ UP _____

Where will the project work be completed? Select one and mark with X:
11 On Campus 11 Off Campus 11 Both on and off Campus

TO DEFAULT NEW FORM DATA: complete cover screen and press 'PF8'
TO PAGE NEW FORM WITHOUT DEFAULTS: press 'PF8'

NEXT FUNCTION: _____ <MENU,KEYS,END>

1. At **Form Action**, enter **ADD**.
2. At **Confidential**, the **N** can be changed to a **Y**.

3. At **Next Approver**, you can enter a user id of the person to approve the form if the next approver is not the default approver on the approval path.
4. At **Budget**, enter the appropriate budget number for the new restricted account.
5. At **Fund**, enter the fund number if known by the department.

> Note:

If the fund number is not known, Research Accounting will enter the fund number when the form reaches the central desk.

6. At **Fund Name**, enter the name of the fund.
7. At **Sponsor/Agency Code**, enter the 10 position agency code of the Sponsoring Agency on the agreement.

> Notes:

- If you do not know the Sponsor/Agency Code, press **PF1** for help in locating the correct code.
- If you cannot locate the correct code, contact Research Accounting to have the Agency Code added to the system.

8. At **Acct Begin Date**, enter the date the account begins.
9. At **Acct End Date**, enter the date the account ends.
10. At **Acct #**, enter the account number you are cloning if you want to clone a previous restricted account.

> Note:

Cloning allows the department to use an existing account with similar attributes as a template for the new restricted account being created. All fields, except those with dollar amounts, will be primed. The user may keep the information that is primed or they can change it to fit the specifications for the new account.

11. At **Where will the project work be completed?**, place an **X** beside one of the categories listed.

Press **PF8** to continue to the next page.

Fund and Rates Information Screen — Page 1

```

ADD UNIVERSITY RESTRICTED FUND                                PAGE 1 OF 9
FUND AND RATES INFORMATION                                    AURA
FORM ACTION: _____ DOCUMENT#: _____ UNIT: _____ CONFIDENTIAL: Y
NEXT APPROVER: _____ EFF DATE: 05 / 12 / 2000          DOCUMENT STATUS:
ACCT#: - - - - - UP                                       ADMIN AREA#: _____
ACCT: _____ BUDG: _____
SPON/AGY: _____

=====FUND=====
FUND NAME: 1 _____ ADV FND(Y/N)? 2
FUND BEG: 3 / / _____ CONTR FND#: 4
FUND END: 5 / / _____ FUND TYPE:
PRECAST: 6 / / _____ PRECAST AMT: 7 FUND CAT:

=====RATES AND CODES=====
FRINGE BENEFITS: _____ FRINGE CODE: _____ COST SHARING RATE: 8
ACAD: 9 N-ACAD: 10 MGMT FEE RATE: 11
WAGE: 12 GRAD: 13 STUDENT: _____ CFDA NUMB: _____
INDIRECT COSTS: _____ INDCOST CODE: _____ CAMPUS CODE:
IND RATE: 14 . 0 CAP: 15 . 0 ARL RATE: 16 . 0 INDCOST TYPE: 17
GOVT USE: 18 . 0 PRIME: 19 . 0 PRIME CREDIT ACCT: 20 - - - - -
ARL ADMIN FEE: _____

NEXT FUNCTION: _____ <MENU,KEYS,END>

```

1. At **Fund Name**, enter the new fund name if it is different than the cloned information.

2. At **Adv Fund**, enter **N** (no) or **Y** (yes) if this is an advanced fund number.

> Note:

If a **Y** is entered, a fund number will be assigned prior to a signed contractual agreement. The form will require the approval of the Associate Dean who, on behalf of the college, accepts full responsibility for all expenditures in the event that the funding is not granted.

3. At **Fund Beg**, enter a new date if it is different than the cloned information.

4. At **Contr Fnd#**, enter a new contract fund number if it is different than the cloned information.

> Notes:

- o If this is a new agreement, the **Contr Fnd#** will be the fund number of the account being created.

- If the new account is a continuation of a long-term contract, the **Contr Fnd#** will be the very first fund number for that contract and the corresponding information for that contract can be primed.
 - If a continuing contract had numerous funds before the start of IBIS in May 1993, the contract fund number is the earliest open fund number.
5. At **Fund End**, enter a new date when the fund ends if it is different than the cloned information.
 6. At **Precost**, enter the date spending is permitted to begin prior to the actual date if it is different than the cloned information.

> Note:

The date entered here must be **earlier** than the date entered in **Fund Beg**.

7. At **Precost Amt**, enter the amount of spending which is permitted to be expended in the period between the **Precost** date and the **Fund Beg** date.
8. At **Cost Sharing Rate**, enter the rate of cost sharing.
9. At **Acad**, enter the rate of fringe benefits for Academics if it is different than the cloned information.
10. At **N-Acad**, enter the rate of fringe benefits for Non-Academics if it is different than the cloned information.
11. At **Mgmt Fee Rate**, enter the rate of direct costs which can be charged to pay the University for administering the agreement.
12. At **Wage**, enter the rate of fringe benefits for Wage employees if it is different than the cloned information.
13. At **Grad**, enter the rate of fringe benefits for Graduate Assistants if it is different than the cloned information.
14. At **Rate**, enter the rate of indirect costs if it is different than the cloned information.

> Note:

The current year rates will be defaulted according to the budget number entered previously with rates for ARL, Hershey, All University-Research, All University-Instruction or Off-Campus being the possible defaults.

15. At **Cap**, enter the ceiling rate of the indirect costs if it is different than the cloned information
16. **ARL Rate** is an additional indirect costs rate charged on ARL contracts.

> Note:

The amount is debited to the contract account and credited to an ARL Expense Account.

17. **Indcost Type** indicates which type of calculation will be performed to determine the amount of indirect costs charged (i.e. REGular, PRIME, ON/OFF, ARL, etc.).

Prime	is an indirect cost percentage that the sponsor is willing to pay over and above the negotiated approved indirect cost rate.
ARL	is the negotiated approved rate for any indirect cost calculation except for those listed above.
On/Off	is for any research projects in which part of the research is done on-campus and off-campus.
Regular	is used for any indirect cost calculation except for those listed above.
ARLPR	is an indirect cost percentage that the sponsor is willing to pay over and above the negotiated/approved indirect ARL rate.

18. **Govt Use** is the rate which the government charges for non-government sponsors to use equipment in the Applied Research Laboratory.
19. **Prime** is an inflated indirect costs rate.

> Note:

The **difference** between the rate keyed in this field and the rate keyed in the **Indirect Costs Rate** is credited to a separate account (the PRIME CREDIT ACCT above).

20. **Prime Credit Acct** is the account which the prime difference is credited.

Press **PF8** to continue.

> Note:

All other fields on this page are completed by Research Accounting.

Account and Project Information Screen — Page 2

ADD UNIVERSITY RESTRICTED FUND PAGE 2 OF 9
ACCOUNT AND PROJECT INFORMATION AURA

FORM ACTION: _____ DOCUMENT#: _____ UNIT: _____ CONFIDENTIAL: Y
NEXT APPROVER: _____ EFF DATE: 05 / 12 / 2000 DOCUMENT STATUS:
ACCT#: - - UP ADMIN AREA#: _____
ACCT: _____ BUDG: _____
SPON/AGY: _____

=====PROJECTS=====

PROJ BEGIN: 1 / 3 / _____ PROJ END: 2 / _____ / _____
PROJ EST AMT: _____ PROJECT NO#: 4

PROJ CORR SSN: 5 - - - - ACCESS ID: _____ CREATE PROFILE(Y/N)? Y 6
PROJ CORR: _____ , , IS PROJ CORR A P.I.(Y/N)? Y 7
PROJ TITLE: 8 _____

=====ACCOUNT (BUDGET / FUND)=====

ACCT NAME: 9 _____ ACCT BEGIN: 10 / _____ / _____
ACCT AWD AMT: 11 _____ BEN FRANKLIN#: 12 _____ ACCT END: _____ / 13 / _____

NEXT FUNCTION: _____ <MENU,KEYS,END>

1. At **Proj Begin**, enter the date the project begins if it is different than the cloned information.
2. At **Proj End**, enter the date the project ends if it is different than the cloned information.
3. At **Proj Est Amt**, enter the estimated amount of the project.

> Note:

This field usually applies to long-term projects.

4. At **Proj No#**, enter the project number.

> Notes:

- If this is a new agreement, the **Proj No#** will be the number of the account being created.
- If the new account is a continuation of a long term contract, the **Proj No#** will be the very first number for that contract and the corresponding information for that contract will be primed. However, if a continuing contract had numerous funds before May 1993, the **Proj No#** is the earliest

open number.

5. At **Proj Corr SSN**, enter the social security number of the project correspondent.

> Note:

This is the person who should be contacted for information on the project.

6. **Create Profile?**, indicate whether the Project Correspondent should (Y) or should not (N) be given security access to the account and its cost centers (if applicable) on Web FIT.

7. At **Is Proj Corr A P.I.?**, indicate whether the project correspondent is a project investigator by entering a **Y** (yes) *or* **N** (no) if it is different than the cloned information.

> Note:

The field will default to **Y** (yes).

8. At **Proj Title**, enter the full title of the project if it is different than the cloned information.

9. At **Acct Name**, enter the name of the account if it is different than the cloned information.

10. At **Acct Begin**, enter the date the account begins if it is different than the cloned information.

11. At **Acct Awd Amt**, enter the award amount for the account.

12. At **Ben Franklin #**, enter the assigned Ben Franklin number.

13. At **Acct End**, enter the date the account ends if it is different than the cloned information.

Press **PF8** to continue.

ADD UNIVERSITY RESTRICTED FUND

PAGE 3 OF 9
AURA

INDICATORS AND REPORTS INFORMATION

FORM ACTION: _____ DOCUMENT#: _____ UNIT: _____ CONFIDENTIAL: Y
NEXT APPROVER: _____ EFF DATE: 05 / 12 / 2000 DOCUMENT STATUS:
ACCT#: - - UP ADMIN AREA#: _____
ACCT: _____ BUDG: _____
SPON/AGY: _____

=====INDICATORS=====

MINORITY PLAN (Y/N)? **1** EXPEND ACCT (Y/N)? Y SUB-CONTRACTS (Y/N)? **2**
CLOSING FORMS (Y/N)? - MATCHING REQUIRED (Y/N)? **3**
IS THIS ACCT USED TO MATCH ANOTHER(Y/N)? N **4** Y, ACCT: **5** - - - UP _____
IS FRINGE CHARGED TO ANOTHER ACCT (Y/N)? **6** IF Y, ACCT: - - **7** - - UP _____
IS TUITION CHARGED TO ANOTHER ACCT(Y/N)? **8** IF Y, ACCT: - - - - **9** UP _____

=====REPORT FREQUENCY=====

EST DEL DUE DATE: **10** / - / - FISC REPORT FREQ: _____ INU FREQ: _____
FISC REPORT TYPE: _____ INU TYPE: _____
FISC REPORT MONTH: _____ INU MONTH: _____
SUPPL OFF INIT: **11**

NEXT FUNCTION: _____ <MENU,KEYS,END>■

1. At **Minority Plan**, enter a **Y** (yes) or **N** (no) to indicate whether a minority plan has been set up for the purchasing of materials on this account if it is different than the cloned information.
2. At **Sub-Contracts**, enter a **Y** (yes) or **N** (no) to indicate whether a subcontract exists for this project if it is different than the cloned information.
3. At **Matching Required**, enter a **Y** (yes) or **N** (no) to indicate if a match is required if it is different than the cloned information.
4. At **Is This Acct Used to Match Another?**, enter a **Y** (yes) or **N** (no) to indicate whether the account being added will be used to match another account if it is different than the cloned information.
5. At **If Y, Acct:**, enter the account number which is matched by the account being added if it is different than the cloned information.
6. At **Is Fringe Charged to Another Acct?**, enter a **Y** (yes) or **N** (no) to indicate whether the fringe benefits associated with this account will be charged to an alternate account if it is different than the cloned information.
7. At **If Y, Acct:**, enter the account number being used to charge fringe benefits if it is different than the cloned information.
8. At **Is Tuition Charged to Another Acct?**, enter a **Y** (yes) or **N** (no) to indicate whether the

tuition associated with this account will be charged to an alternate account by if it is different than the cloned information.

9. At **If Y, Acct:**, enter the account number being used to charge tuition if it is different than the cloned information.
10. At **Est Del Due Date**, enter the estimated date the first deliverable is due if it is different than the cloned information.
11. At **Suppl Off Init**, enter the initial of the Supplemental Administrative Officer to whom reports will be routed if it is different than the cloned information.

Press **PF6** to go to the **Notepad**.

> Note:

All other fields and pages will be completed by Research Accounting.

Principle Investigator — Page 8

ADD UNIVERSITY RESTRICTED FUND				PAGE 8 OF 9	
PRINCIPLE INVESTIGATOR				AURA	
FORM ACTION: _____	DOCUMENT#:	UNIT:	CONFIDENTIAL: Y		
NEXT APPROVER: _____	EFF DATE: 05 / 12 / 2000		STATUS:		
ACCT#: - -	UP	ADMIN AREA#:			
ACCT:	BUDG:				
SPON/AGY:					
=====					
P.I.:	LAST NAME	FI	MI	SOC SEC NUMBER	ACCESS ID PROFILE(Y/N)
		,	,	1	2
				— — —	N
				— — —	N
				— — —	N
				— — —	N
				— — —	N
				— — —	N
				— — —	N
				— — —	N
Last Action:					
Last Action Name:					
NEXT FUNCTION: _____ (MENU, KEYS, END)					

1. **Soc Sec Number** — enter the Social Security Number(s) of all principal investigator(s) on project (maximum of 8).

2. **Access ID Profile** — indicate whether the principal investigator(s) should (Y) or should not (N) be given security access to the account and its cost centers (if applicable) on Web FIT.

Research Incentive Distribution — Page 9

```

ADD UNIVERSITY RESTRICTED FUND                                PAGE 9 OF 10
RESEARCH INCENTIVE DISTRIBUTION                                AURA
FORM ACTION: _____ DOCUMENT#: _____ UNIT: _____ CONFIDENTIAL: Y
NEXT APPROVER: _____ EFF DATE: 04 / 19 / 2001 ADMIN AREA#: _____ STATUS:
ACCT#: - - - UP SPON/AGY: _____
ACCT: _____ BUDG: _____
===== RESEARCH CATEGORIES =====
SSN 1 P. I. LAST NAME FI MI 2 TOTAL
-----
-----
-----
-----
-----
-----
-----
-----
-----
-----
TOTAL
Last Action:
Last Action Name:
NEXT FUNCTION: (MENU, KEYS, END)

```

New page (page 9) was added. This page contains information for creating a new research incentive distribution record for an account at a time when account is created on AURA form.

After research incentive distribution record is created on AURA form, it can be updated/displayed with URID/IRID functions.

1. Principle investigator's (PI's) SSN entered on page 8 would be automatically inputted on page 9.

Only SSN of the University employee can be used on this form; the same SSN cannot be used more than once.

Proceed the same way with the rest of the PIs participating in the project. PI(s) can be entered even if his/hers incentive distribution for this project is 0%.

2. PF1 key on the category field can be used to bring a list of research categories available.

All research categories should be valid, the same category cannot be entered more than once, and the maximum number of categories for one account on AURA form can be 3 categories. If there is more than 3 categories needed for an account, more categories can be entered through URID function. Total of 6 categories is allowed for one account.

After all categories are selected or entered on the screen, input SSN(s) of the PI(s) (other than the ones already there from page 8) and percent(s) of incentive distribution for this person(s).

If you don't know which category to select, but need to process AURA form, use NA category and 100% for project corresponded SSN. Later this information can be changed.

After all information is filled on the screen, press PF12 key. Names would be inputted automatically, and totals by category and by SSN will be calculated.

Total should always be equal 100%.

Notepad Area Screen — Page 10

```

                                ADD UNIVERSITY RESTRICTED FUND                PAGE 10 OF 10
                                NOTEPAD AREA                                AURA
FORM ACTION:  _____ DOCUMENT#:          UNIT:          CONFIDENTIAL: Y
NEXT APPROVER: _____ EFF DATE: 04 / 19 / 2001          STATUS:
ACCT#:      -      -      UP          ADMIN AREA#:
ACCT:
SPON/AGY:
=====
NOTE PAD AREA:  1
                _____
                _____
                _____
                _____

Last Action:
Last Action Name:
NEXT FUNCTION:                                     (MENU, KEYS, END)
```

1. Enter comments in the **Notepad**, if desired.

Press **PF12** to **ADD** the form.

Enter **SUB** at **Form Action** and press **PF12** to submit the form through the approval path.

Additional AURA Documentation:

- Introduction to the AURA Form
- Locating the Financial Accounting Maintenance System
- Use of the AURA Form without a Clone
- Accounts and Fund System Screens
- Agency/Subagency System Screens
- Contract Information System Screens

Last Revised: 10/27/2003

ENTER BUDGET AND FUND FOR RECORD RETRIEVAL

05/12/00
13:34:38.2

IBIS FINANCIAL MAINTENANCE SYSTEM
Account Data Update

IACT
JWD1
Page 1

Acct#: - - Admin Area#:
 Acct Name: _____
 Sponsor/Agency:
 Create: 00 / 00 / 0000
 Acct Beg: 00 / 00 / 0000 Acct End: 00 / 00 / 0000 Carry Fwd (Y/N):
 Hold Close: 00 / 00 / 0000 Acct Close: 00 / 00 / 0000 Clearing Acct (Y/N): _
 Expend Acct (Y/N): _
 Acct Awd Amt: _____ Matches: _ - _ - _
 Codes: Rates: Prime Acct: _ - _ - _
 Cost Type: _____ Fringe Acad: _____ Ind Calc Prime Rate: _____
 Fund Type: _____ Fringe N-Acad: _____ Ind Calc ARL Rate: _____
 Fund Cat : _____ Fringe Wage: _____ Ind Calc Govt Use : _____
 Fringe: _____ Fringe Grad: _____ ARL Admin Fee : _____
 Ind Calc Code: _ Fringe Stud: _____ FRSB Indicator: _
 Ind Calc Type: _____ Ind Calc Rate: _____ Report Route:
 CFDA Numb: _____ Ind Calc Cap: _____ Suppl Off Init: _
 Ben Franklin #: _____ Cost Share: _____ AdmOff:
 Mgmt Fee: _____ Report Type: _____
NEXT ACCT#: ① - - - **UP 100 10_ 07 / 01 / 1999**
NEXT FUNCTION: _____ **<MENU,KEYS,END>** █

1.

At **Next Acct#**, enter the budget and fund you want to view.

Example:

Enter budget and fund 4-28-54 UP 6521 as 04 028 54 UP 65210.

Press **Enter** to view the budget and fund entered.

PRESS 'PF8' FOR PRECOST INFO - PAGE 2

05/12/00
13:38:56.2

IBIS FINANCIAL MAINTENANCE SYSTEM

Account Data Update

IACT
JWD1
Page 1

Acct#: 04-028-54 UP 65210 Admin Area#: 028

Acct Name: NSF NEG PRESS

Sponsor/Agency: NATL SCI FDN

Create: 04 / 01 / 1991

Acct Beg: 04 / 01 / 1991 Acct End: 09 / 30 / 1992 Carry Fwd (Y/N):

Hold Close: 09 / 30 / 1992 Acct Close: 12 / 31 / 2099 Clearing Acct (Y/N): N

Expend Acct (Y/N): Y

Acct Awd Amt: 33000.00 Matches: - - - -

Codes: Rates: Prime Acct: - - - -

Cost Type: RESON Fringe Acad: 25.55_ Ind Calc Prime Rate: _

Fund Type: RSTR Fringe N-Acad: 25.55_ Ind Calc ARL Rate: _

Fund Cat: FEDR_ Fringe Wage: 7.60_ Ind Calc Govt Use: _

Fringe: FIXED_ Fringe Grad: 10.30_ ARL Admin Fee: _

Ind Calc Code: A_ Fringe Stud: _ FASB Indicator: -

Ind Calc Type: REG_ Ind Calc Rate: 44.80_ Report Route:

CFDA Numb: _ Ind Calc Cap: 44.89_ Suppl Off Init: _

Ben Franklin #: _ Cost Share: _ AdmOff: GLG

Mgmt Fee: _ Report Type: NONE_

NEXT ACCT#: 04 1 028 - 54 UP 65210_ 07 / 01 / 1999

NEXT FUNCTION: (MENU, KEYS, END)

The account information that was requested will appear in the Account Data Inquiry screen.

Account Match Inquiry Screen — (IAMI)

05/12/00
13:48:56.5

INTEGRATED BUSINESS INFORMATION SYSTEM

M1M1
JWD1

Any of the functions included in this system can be invoked by entering the corresponding function code on the command line next to 'NEXT FUNCTION:'. The following functions are available:

FUNCTION	DESCRIPTION	FUNCTION	DESCRIPTION
FORM	Help Selecting HRS Forms	M2PI	Property Inventory
M2AH	IBIS Adhoc Functions	M2PR	Purchasing System
M2AS	EASY Elec. Appr. System	M2VA	Vendor System
M2BG	Budgeting System	BAMM	Budget Planning: BudAuto
M2FN	Financial System	M2IM	Inventory Management
M2FS	Facilities System	CODE	Codeset Maint. System
M2HR	Human Resources System	M2NC	Nat Conn. Applications
M2PA	Payroll System	M2PE	Pay & Effort Functions

NEXT FUNCTION: IAMI **PREV MENU:** NONE
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP MENU CMPS END KEYS PRNT .

1. At **Next Function**, type **IAMI**.

Press **Enter** to pull up the **Account Match Inquiry** screen.

ENTER BUDGET AND FUND FOR RECORD RETRIEVAL

05/12/00
13:52:59.0

IBIS FINANCIAL MAINTENANCE SYSTEM
Account Match Inquiry ←

IAMI
JWD1

Acct#: - - is matched by the following accounts

Match Acct #	Begin Date	End Date
- -	00 / 00 / 0000	00 / 00 / 0000
- -	00 / 00 / 0000	00 / 00 / 0000
- -	00 / 00 / 0000	00 / 00 / 0000
- -	00 / 00 / 0000	00 / 00 / 0000
- -	00 / 00 / 0000	00 / 00 / 0000
- -	00 / 00 / 0000	00 / 00 / 0000
- -	00 / 00 / 0000	00 / 00 / 0000
- -	00 / 00 / 0000	00 / 00 / 0000
- -	00 / 00 / 0000	00 / 00 / 0000
- -	00 / 00 / 0000	00 / 00 / 0000
- -	00 / 00 / 0000	00 / 00 / 0000
- -	00 / 00 / 0000	00 / 00 / 0000
- -	00 / 00 / 0000	00 / 00 / 0000
- -	00 / 00 / 0000	00 / 00 / 0000
- -	00 / 00 / 0000	00 / 00 / 0000

NEXT ACCT#: - - **UP** **100 10**
NEXT FUNCTION: _____ **(MENU,KEYS,END)**

1. At **Next Acct#**, enter the budget and fund you want to view.

05/12/00
14:03:39.1

INTEGRATED BUSINESS INFORMATION SYSTEM

M1M1
JWD1

Any of the functions included in this system can be invoked by entering the corresponding function code on the command line next to 'NEXT FUNCTION:'. The following functions are available:

FUNCTION	DESCRIPTION	FUNCTION	DESCRIPTION
FORM	Help Selecting HRS Forms	M2PI	Property Inventory
M2AH	IBIS Adhoc Functions	M2PR	Purchasing System
M2AS	ERSY Elec. Appr. System	M2VA	Vendor System
M2BG	Budgeting System	BAMM	Budget Planning: BudAuto
M2FN	Financial System	M2IM	Inventory Management
M2FS	Facilities System	CODE	Codeset Maint. System
M2HR	Human Resources System	M2NC	Nat Conn. Applications
M2PA	Payroll System	M2PE	Pay & Effort Functions

NEXT FUNCTION: IFND **1** **PREV MENU: NONE**
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP MENU CMPS END KEYS PRNT . |

1. At **Next Function**, type **IFND**.

Press **Enter** to pull up the **Fund Data Inquiry** screen.

ENTER BUDGET AND FUND FOR RECORD RETRIEVAL ←
05/12/00 **IBIS FINANCIAL MAINTENANCE SYSTEM** IFND
14:06:12.5 **Fund Data Inquiry** ← JWD1

Fund#: Fund Name:
Contr Fund#: Spon/Agy:

Fund Begin: 00 / 00 / 0000 Advance Fund (Y/N):
Fund End: 00 / 00 / 0000 Sub-contracts (Y/N):
Fund Close: 00 / 00 / 0000

Fund Award Amt: Fund Type:
Fund Category:

Ledger Type: Percent Retain:
Campus Indc: Retain Cap Amount:

NEXT ACCT#: **1** **UP 100 10_ 05 / 12 / 2000**
NEXT FUNCTION: _____ **<MENU,KEYS,END>**

1. At **Next Acct#**, enter the budget and fund you want to view.

Example:

Enter budget and fund 4-28-54 UP 6521 as 04 028 54 UP 65210.

Press **Enter** to view the budget and fund entered.

```
05/12/00          IBIS FINANCIAL MAINTENANCE SYSTEM          IFND
14:12:52.4          Fund Data Inquiry ←                      JWD1

Fund#: 65210      Fund Name: NSF NEG PRESS
Contr Fund#: 65210  Spon/Agy: NATL SCI FDN

Fund Begin: 04 / 01 / 1991      Advance Fund (Y/N): N
Fund End: 09 / 30 / 1992      Sub-contracts (Y/N): N
Fund Close: 12 / 31 / 2099

Fund Award Amt: 33000.00      Fund Type: RSTR
Fund Category: FEDR

Ledger Type: DESIG      Percent Retain:
Campus Indc: NONE      Retain Cap Amount:

NEXT ACCT#: 04 - 028 - 54 UP 65210_ 05 / 12 / 2000
NEXT FUNCTION: _____ (MENU, KEYS, END)
```

The fund information that you requested will appear on the **Fund Data Inquiry** screen.

Department Account Match Update Screen — (UDMI)

05/12/00
14:17:07.4

INTEGRATED BUSINESS INFORMATION SYSTEM

M1M1
JWD1

Any of the functions included in this system can be invoked by entering the corresponding function code on the command line next to 'NEXT FUNCTION:'. The following functions are available:

FUNCTION	DESCRIPTION	FUNCTION	DESCRIPTION
FORM	Help Selecting HRS Forms	M2PI	Property Inventory
M2AH	IBIS Adhoc Functions	M2PR	Purchasing System
M2AS	EASY Elec. Appr. System	M2VA	Vendor System
M2BG	Budgeting System	BAMM	Budget Planning: BudAuto
M2FN	Financial System	M2IM	Inventory Management
M2FS	Facilities System	CODE	Codeset Maint. System
M2HR	Human Resources System	M2NC	Nat Conn. Applications
M2PA	Payroll System	M2PE	Pay & Effort Functions

NEXT FUNCTION: UDMI **1** **PREV MENU: NONE**
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP MENU CMPS END KEYS PRNT .

1. At **Next Function**, type **UDMI**.

Press **Enter** to pull up the **Department Account Match Update** screen.

ENTER BUDGET AND FUND FOR RECORD RETRIEVAL

05/12/00
14:20:23.4

IBIS FINANCIAL MAINTENANCE SYSTEM
Department Account Match Update ←

UDMI
JWD1

Acct#: - -

Acct Beg: 00 / 00 / 0000

Acct End: 00 / 00 / 0000

Acct Cls: 00 / 00 / 0000

MATCH BUDGET: _ - _ - _

Match Fund: _____

Acct Text (Dept): _____

Acct Text (Cent): _____

NEXT ACCT#: _ - **1** - **UP 100 10_ 05 / 12 / 2000** (END DATE)
NEXT FUNCTION: _____ (MENU, KEYS, END)

1. At **Next Acct#**, enter the budget and fund you want to update.

Example:

Enter budget and fund 4-28-54 UP 6521 as 04 028 54 UP 65210.

Press **Enter** to view the budget and fund entered.

```
ENTER BUDGET AND FUND FOR RECORD RETRIEVAL
05/12/00                                UDMI
14:25:02.4                              JWD1
IBIS FINANCIAL MAINTENANCE SYSTEM
Department Account Match Update ←
Acct#: 01 - 089 - 42 UP 32600
Acct Beg: 01 / 01 / 1980
Acct End: 12 / 31 / 2099
Acct Cls: 12 / 31 / 2099
MATCH BUDGET: 01 2 089 - 42
Match Fund: 32600 3
Acct Text (Dept): _____
Acct Text (Cent): _____
NEXT ACCT#: 01 - 089 - 42 UP 32600_ 05 / 12 / 2000 (END DATE)
NEXT FUNCTION: _____ (MENU,KEYS,END)
```

2. At **Match Budget**, update the match budget as appropriate.

Example:

Enter budget 1-89-42 UP as 01 089 42 UP.

3. At **Match Fund**, update the match fund as appropriate.

Example:

Enter fund 3260 as 32600.

Press **Enter** to update the **Department Account Match** screen.

RECORD HAS BEEN UPDATED FOR 0607070 UP 10010 ←

05/18/00
10:36:16.3

IBIS FINANCIAL MAINTENANCE SYSTEM
Department Account Match Update

UDM1
JWD1

Acct#: 06 - 070 - 70 UP 10010

Acct Beg: 01 / 01 / 1980
Acct End: 12 / 31 / 2099
Acct Cls: 12 / 31 / 2099

MATCH BUDGET: 06 - 070 - 70 UP
Match Fund: 203X0_ ←

Acct Text (Dept): _____

Acct Text (Cent): _____

NEXT ACCT#: 06 - 070 - 70 UP 10010_ 05 / 18 / 2000 (END DATE)
NEXT FUNCTION: _____ (MENU,KEYS,END)

A message will appear at the top of the screen stating that the record has been updated.

Additional AURA Documentation

- Introduction to the AURA Form
- Locating the Financial Accounting Maintenance System
- Use of the AURA Form without a Clone
- Use of the AURA Form with a Clone
- Agency/Subagency System Screens
- Contract Information System Screens

Last Revised: 10/27/2003

05/18/00
10:46:26.6

IBIS FINANCIAL MAINTENANCE SYSTEM
Agency Name Browse

BAGY
JWD1

	AGENCY NAME		AGENCY CODE
1	A T & T CORP		AT&TCORP
2	AAA		AAA 1
3	AAA	1	AAA 1
4	AAAA JIM TEST SPONSOR		AAAAJIM
5	AAAA XYZ		AAAAXYZ
6	AAA 1		AAA
7	AARP ANDRUS FDM		ADDRUSFDM
8	ABB AIR PREHEATER INC		ABBAIR
9	ABB COMBUSTION ENGINE		ABBCMB
10	ABBOTT FURNACE CO		ABBOTFUR
11	ABBOTT LABS		ABBOTLAB
12	ABC FDM FOR TRAFFIC SA FTEY		AAAFDM
13	ABLEMARLE CORP		ABLEMARLE
14	ABRAMS GERALD-UP AGR		ABRMS
15	ABT ASSOCIATES INC		ABTASSOC

Browse LINE: 15 **2**
NEXT NAME: ABT ASSOCIATES INC. **1** <RESTART LISTING AT NAME>
NEXT FUNCTION: _____ <MENU, KEYS, END>

1. At **Next Name**, enter the agency name you want to view.

Press **Enter**.

2. At **Browse Line**, enter the number that corresponds with the agency name that you would like to view.

> **Note:**

If you are unable to locate the sponsor you are inquiring about, contact Research Accounting.

Press **Enter** to view the agency information.

1. At **Next Function**, type **BAGC**.

Press **Enter**.

```
05/18/00          IBIS FINANCIAL MAINTENANCE SYSTEM          BAGC
11:05:01.8          Agency Code Browse                      JWD1

Agency Code      Agency Name
1  AAA            AAA 1
2  AAA            AAA
3  AAAAJIM       AAAA JIM TEST SPONSOR
4  AAAXYZ        AAAA XYZ
5  AAAFDM        ABC FDM FOR TRAFFIC SA FTEY
6  AAA 1         AAA
7  AARCH         AMER INST OF ARCHITECTURE
8  ABBAIR        ABB AIR PREHEATER INC
9  ABBCMB        ABB COMBUSTION ENGINE
10 ABBOTFUR      ABBOTT FURNACE CO
11 ABBOTLAB      ABBOTT LABS
12 ABLEMARLE     ABLEMARLE CORP
13 ABRMS         ABRAMS GERALD-UP AGR
14 ABTASSOC      ABT ASSOCIATES INC
15 ACADAPPLY     ACAD OF APPLIED SCI

Browse LINE: 15  2
NEXT CODE: ACADAPPLY_ 1
NEXT FUNCTION: _____ (RESTART LISTING AT CODE)
                                     (MENU,KEYS,END)
```

1. At **Next Code**, enter the code of the subagency you want to view.

Press **Enter**.

2. At **Browse Line**, enter the number that corresponds with the subagency code that you would like to view.

Press **Enter** to view the agency information.

1. At **Next Function**, type **BSGY**.

Press **Enter**.

```
05/18/00          IBIS FINANCE MAINTENANCE SYSTEM          BSGY
11:15:07.4       Subagency Name Browse                    JWD 1

NAME              CODE
1  AG RESEARCH SVC      ARS
2  AHLSTROM FILTRATION INC  AHLST
3  AIR PRODUCTS & CHEMICALS INC  AIRP
4  AKZO                  AKZO
5  ALCOA                 ALCOAA
6  ALLIED CORP           ALLD
7  ALUMINUM CO OF AMER (ALCOA)  ALCO
8  ALUMINUM CO OF AMERICA  ALCOA
9  AMER TECH             AMTC
10 APPLES                APPLES
11 APPLES II             APPLES I
12 APPLIED BIOTECHNICS   APPLB
13 APPLIED SCI & TECH INC  APSC
14 ARCO COAL             ARCO
15 ARMSTRONG WORLD IND    ARMS

Browse LINE: 15 2
NEXT NAME: ARMSTRONG_ 1      <RESTART LISTING AT NAME>
NEXT FUNCTION: _____ <MENU,KEYS,END>
```

1. At **Next Name**, enter the subagency name you want to view.

Press **Enter**.

2. At **Browse Line**, enter the number that corresponds with the subagency name you would like to view.

> Note:

If you are unable to locate the sponsor you are inquiring about, contact Research Accounting.

Press **Enter** to view the agency information.

05/18/00
11:19:19.5

IBIS FINANCE MAINTENANCE SYSTEM
Subagency Name Browse

BSGY
JWD1

Code: **ARMS**_____



Name: **ARMSTRONG WORLD IND**_____

Old Source Code: **A**

NO	AGENCY CODE	FUND	---BEGIN---	---END---	AWARD TD
1	_____	_____	-- / -- / _____	-- / -- / _____	_____
2	_____	_____	-- / -- / _____	-- / -- / _____	_____
3	_____	_____	-- / -- / _____	-- / -- / _____	_____
4	_____	_____	-- / -- / _____	-- / -- / _____	_____
5	_____	_____	-- / -- / _____	-- / -- / _____	_____
6	_____	_____	-- / -- / _____	-- / -- / _____	_____
7	_____	_____	-- / -- / _____	-- / -- / _____	_____
8	_____	_____	-- / -- / _____	-- / -- / _____	_____
9	_____	_____	-- / -- / _____	-- / -- / _____	_____
10	_____	_____	-- / -- / _____	-- / -- / _____	_____

NEXT FUNCTION: _____ **(MENU,KEYS,END)** |

Press **PF12** to return to the **Browse Subagencies by Subagency Name** screen.

Browse Subagencies by Subagency Code — (BSGC)

05/18/00
11:23:13.9

INTEGRATED BUSINESS INFORMATION SYSTEM

M1M1
JWD1

Any of the functions included in this system can be invoked by entering the corresponding function code on the command line next to 'NEXT FUNCTION:'. The following functions are available:

FUNCTION	DESCRIPTION	FUNCTION	DESCRIPTION
FORM	Help Selecting HRS Forms	M2PI	Property Inventory
M2AH	IBIS Adhoc Functions	M2PR	Purchasing System
M2AS	ERSY Elec. Appr. System	M2VA	Vendor System
M2BG	Budgeting System	BAMM	Budget Planning: BudAuto
M2FN	Financial System	M2IM	Inventory Management
M2FS	Facilities System	CODE	Codeset Maint. System
M2HR	Human Resources System	M2NC	Nat Conn. Applications
M2PA	Payroll System	M2PE	Pay & Effort Functions

NEXT FUNCTION: **BSGC** **1** _____ **PREV MENU:** NONE

Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP MENU CMPS END KEYS PRNT |

1. At **Next Function**, type **BSGC**.

Press **Enter**.

```
05/18/00          IBIS FINANCE MAINTENANCE SYSTEM          BSGC
11:33:52.5       Subagency Code Browse                JWD1

CODE              NAME
1  AG              NATL INST ON AGING
2  AH              DIV OF ASSOC HEALTH PROF
3  AHLST           AHLSTROM FILTRATION INC
4  AI              NATL INST ALLERGY & INFECTIOUS
5  AIRP            AIR PRODUCTS & CHEMICALS INC
6  AKZO            AKZO
7  ALCO            ALUMINUM CO OF AMER (ALCOA)
8  ALCOA           ALUMINUM CO OF AMERICA
9  ALCOAA          ALCOA
10 ALLD            ALLIED CORP
11 AM              NATL INST ARTH,METAB & DIG DIS
12 AMES            NASA - AMES
13 ANTC            AMER TECH
14 APPLB           APPLIED BIOTECHNICS
15 APPLES          APPLES

Browse LINE: 15 2
NEXT CODE: APPLES 1
NEXT FUNCTION: _____ (RESTART LISTING AT CODE)
                                   (MENU,KEYS,END)
```

1. At **Next Code**, enter the code of the subagency you would like to view.

Press **Enter**.

2. At **Browse Line**, enter the number that corresponds with the subagency code you would like to view.

Press **Enter** to view the agency information.

05/18/00
12:49:09.4

IBIS FINANCE MAINTENANCE SYSTEM
Subagency Code Browse

BSGC
JWD1

Code: APPLES_____

Name: APPLES_____

Old Source Code: A

NO	AGENCY CODE	FUND	---BEGIN---	---END---	AWARD TD
1	ACAPS_____	_____	06 / 21 / 1993	11 / 12 / 1993	_____
2	AAAFDM_____	_____	06 / 21 / 1993	11 / 12 / 1993	_____
3	EMERT_____	_____	02 / 20 / 1993	11 / 12 / 1993	_____
4	ACEX_____	12300_	06 / 20 / 1993	11 / 12 / 1993	_____
5	_____	_____	___ / ___ / ___	___ / ___ / ___	_____
6	_____	_____	___ / ___ / ___	___ / ___ / ___	_____
7	_____	_____	___ / ___ / ___	___ / ___ / ___	_____
8	_____	_____	___ / ___ / ___	___ / ___ / ___	_____
9	_____	_____	___ / ___ / ___	___ / ___ / ___	_____
10	_____	_____	___ / ___ / ___	___ / ___ / ___	_____

NEXT FUNCTION : _____ (MENU,KEYS,END)

Press **PF12** to return to the **Browse Subagencies by Subagency Code** screen.

Additional AURA Documentation

- Introduction to the AURA Form
- Locating the Financial Accounting Maintenance System
- Use of the AURA Form without a Clone
- Use of the AURA Form with a Clone
- Agency/Subagency System Screens
- Contract Information System Screens

Last Revised: 10/27/2003

Press **Enter**.

```
ENTER BUDGET AND FUND FOR RECORD RETRIEVAL
05/19/00          IBIS FINANCIAL MAINTENANCE SYSTEM          ICNA
09:07:19.3      Contract Information Inquiry                JWD1

      Acct#:      - - -      Contract Fund#:
      Agreement:      Prime#:
      Sponsor/Agency:      Document#:
      Fed Pass Thru#:      Agreement Period#:
      Pass Thru Code:      Pass Thru Agcy Name:
      Priority Rating:
      Contr Awd Amt:      Contract Begin: 00 / 00 / 0000
      Salary Cap Amt:      Contract End   : 00 / 00 / 0000
      Tot Pre-Awd Amt:      Contract Close: 00 / 00 / 0000
      Pre-Awd Begins: 00 / 00 / 0000

                               Source Codes:
                               Sponsor/Agency Cat:
      Contr Agmt Type:      Sponsor/Agency Code:
      Equip Own:      Cash Type:
      FACD Code:      Sub-Agency Code:

NEXT ACCT#:  1 - UP 100 10_ 05 / 19 / 2000
NEXT FUNCTION: _____ <MENU,KEYS,END>
```

1. At **Next Acct#**, enter the budget and fund you want to view.

Example:

Enter the budget and fund 4-28-54 UP 6521 as 04 028 54 UP 65210.

Press **Enter**.

05/19/00
09:11:22.3

IBIS FINANCIAL MAINTENANCE SYSTEM
Contract Information Inquiry

ICNA
JWD1

Acct#: 04-028-54 UP 65210 Contract Fund#: 65210
Agreement: DMR 91-10754 Prime#:
Sponsor/Agency: NATL SCI FDN Document#: 91-10754
Fed Pass Thru#: Agreement Period#:
Pass Thru Code: Pass Thru Agency Name:
Priority Rating: Contract Begin: 04 / 01 / 1991
Contr Awd Amt: 33000.00 Contract End : 09 / 30 / 1992
Salary Cap Amt: Contract Close: 12 / 31 / 2099
Tot Pre-Awd Amt: Source Codes:
Pre-Awd Begins: 00 / 00 / 0000 Sponsor/Agency Cat: FED
Contr Agmt Type: GRANT Sponsor/Agency Code: NSF
Equip Own: NONE Cash Type: LOC
FACO Code: NONE Sub-Agency Code: NONE

NEXT ACCT#: 04 - 028 - 54 UP 65210_ 05 / 19 / 2000
NEXT FUNCTION: _____ (MENU,KEYS,END) |

The contract information that you requested will appear on the **Contract Information A Inquiry** screen.

Press **PF8** to go to **ICNB**.

Contract Information 'B' Inquiry Screen — (ICNB)

05/19/00
09:17:20.9

INTEGRATED BUSINESS INFORMATION SYSTEM

M1M1
JWD1

Any of the functions included in this system can be invoked by entering the corresponding function code on the command line next to 'NEXT FUNCTION:'. The following functions are available:

FUNCTION	DESCRIPTION	FUNCTION	DESCRIPTION
FORM	Help Selecting HRS Forms	M2PI	Property Inventory
M2AH	IBIS Adhoc Functions	M2PR	Purchasing System
M2AS	ERASY Elec. Appr. System	M2VA	Vendor System
M2BG	Budgeting System	BAMM	Budget Planning: BudAuto
M2FN	Financial System	M2IM	Inventory Management
M2FS	Facilities System	CODE	Codeset Maint. System
M2HR	Human Resources System	M2NC	Nat Conn. Applications
M2PA	Payroll System	M2PE	Pay & Effort Functions

NEXT FUNCTION: ICNB **1** **PREV MENU: NONE**
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP MENU CMPS END KEYS PRNT .

1. At **Next Function**, type **ICNB** (or press **PF8** from **ICNA**).

Press **Enter**.

ENTER BUDGET AND FUND FOR RECORD RETRIEVAL

05/19/00
09:30:03.5

IBIS FINANCIAL MAINTENANCE SYSTEM
Contract Information Inquiry - B

ICNB
JWD1

Acct#: - - Contract Fund#:
Agreement: Prime#:
Sponsor/Agency: Document#:
Agreement Period#:
Project Title:

Invoice Exceptn:
Federal Forms: Minority Plan (Y/N):
Contr Pay Type: Closing Papers (Y/N):
Contract End: 00 / 00 / 0000 Matching Required (Y/N):
Deliver Notified (Y/N):

Deliverables: Fiscal Report: Invoice:
Estm Del Due: 00 / 00 / 0000 Freq: Freq:
Del Submit: 00 / 00 / 0000 Type: Type:
Month Due: Month Due:

NEXT ACCT#: **1** - **UP 100 10_ 05 / 19 / 2000**
NEXT FUNCTION: **(MENU,KEYS,END)**

1. At **Next Acct#**, enter the budget and fund you want to view.

Example:

Enter the budget and fund 4-28-54 UP 6521 as 04 028 54 UP 65210.

Press **Enter**.

```
05/19/00                                IBIS FINANCIAL MAINTENANCE SYSTEM                                ICNB
09:32:44.5                               Contract Information Inquiry - B                                JWD1

      Acct#: 04-028-54 UP 65210           Contract Fund#: 65210
      Agreement: DMR 91-10754             Prime#:
      Sponsor/Agency: NATL SCI FDN       Document#: 91-10754
                                           Agreement Period#:

      Project Title: NSF NEG PRESS

Invoice Exceptn:
Federal Forms:
Contr Pay Type: NONE
Contract End: 09 / 30 / 1992

Minority Plan (Y/N): N
Closing Papers (Y/N): N
Matching Required (Y/N): N
Deliver Notified (Y/N): N

Deliverables:           Fiscal Report:           Invoice:
Estm Del Due: 00 / 00 / 0000   Freq: NONE           Freq: NONE
Del Submit: 00 / 00 / 0000     Type: NONE           Type: NONE
                               Month Due: NONE       Month Due: NONE

NEXT ACCT#: 04 - 028 - 54 UP 65210_   05 / 19 / 2000
NEXT FUNCTION: _____ <MENU,KEYS,END>
```

The contract information that you requested will appear on the **Contract Information B Inquiry** screen.

Press **PF7** to go to **ICNA**.

Contract Tuition/Fringe Inquiry Screen — (IFRG)

05/19/00
09:40:32.8

INTEGRATED BUSINESS INFORMATION SYSTEM

M1M1
JWD1

Any of the functions included in this system can be invoked by entering the corresponding function code on the command line next to 'NEXT FUNCTION:'. The following functions are available:

FUNCTION	DESCRIPTION	FUNCTION	DESCRIPTION
FORM	Help Selecting HRS Forms	M2PI	Property Inventory
M2AH	IBIS Adhoc Functions	M2PR	Purchasing System
M2AS	EASY Elec. Appr. System	M2VA	Vendor System
M2BG	Budgeting System	BAMM	Budget Planning: BudAuto
M2FN	Financial System	M2IM	Inventory Management
M2FS	Facilities System	CODE	Codeset Maint. System
M2HR	Human Resources System	M2NC	Nat Conn. Applications
M2PA	Payroll System	M2PE	Pay & Effort Functions

NEXT FUNCTION: IFRG **1** **PREV MENU: NONE**
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP MENU CMPS END KEYS PRNT .

1. At **Next Function**, type **IFRG**.

Press **Enter**.

ENTER BUDGET AND FUND FOR RECORD RETRIEVAL

05/19/00
09:47:56.1

IBIS FINANCIAL MAINTENANCE SYSTEM
Contract Tuition/Fringe Inquiry

IFRG
JWD1

Acct#: - - Contract Fund#:
Agreement: Prime#:
Sponsor/Agency: Agreement Period#:

Fringe Charged to another Acct (Y/N):
Fringe Acct#: - -

Fringe Code :
Fringe Rates:
Acad: N-Acad: Wage:
Grad: Stud:

Tuition Charged to another Acct (Y/N):
Tuition Acct#: - -

NEXT ACCT#: **1** - **UP 100 10_ 05 / 19 / 2000**
NEXT FUNCTION: _____ **<MENU,KEYS,END>**

1. At **Next Acct#**, enter the budget and fund you want to view.

Example:

Enter the budget and fund 4-28-54 UP 6521 as 04 028 54 UP 65210.

Press **Enter**.

```
05/19/00          IBIS FINANCIAL MAINTENANCE SYSTEM          IFRG
09:50:32.5       Contract Tuition/Fringe Inquiry          JWD1

      Acct#: 04-028-54 UP 65210          Contract Fund#: 65210
      Agreement: DMR 91-10754          Prime#:
      Sponsor/Agency: NATL SCI FDN          Agreement Period#:

Fringe Charged to another Acct (Y/N): N
      Fringe Acct#: - -

Fringe Code : FIXED
Fringe Rates:
      Acad: 25.55      N-Acad: 25.55      Wage: 7.60
      Grad: 10.30      Stud:

Tuition Charged to another Acct (Y/N): N
      Tuition Acct#: - -

NEXT ACCT#: 04 - 028 - 54 UP 65210_      05 / 19 / 2000
NEXT FUNCTION: _____ (MENU,KEYS,END)
```

The tuition/fringe information that you requested will appear on the **Contract Tuition/Fringe Inquiry** screen.

Update Fringe/Tuition Account Screen — (UFTA)

05/19/00
09:55:23.5

INTEGRATED BUSINESS INFORMATION SYSTEM

M1M1
JWD1

Any of the functions included in this system can be invoked by entering the corresponding function code on the command line next to 'NEXT FUNCTION:'. The following functions are available:

FUNCTION	DESCRIPTION	FUNCTION	DESCRIPTION
FORM	Help Selecting HRS Forms	M2PI	Property Inventory
M2AH	IBIS Adhoc Functions	M2PR	Purchasing System
M2AS	ERSY Elec. Appr. System	M2VA	Vendor System
M2BG	Budgeting System	BAMM	Budget Planning: BudAuto
M2FN	Financial System	M2IM	Inventory Management
M2FS	Facilities System	CODE	Codeset Maint. System
M2HR	Human Resources System	M2NC	Nat Conn. Applications
M2PA	Payroll System	M2PE	Pay & Effort Functions

NEXT FUNCTION: UFTA **1** **PREV MENU: NONE**
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP MENU CMPS END KEYS PRNT . |

1. At **Next Function**, type **UFTA**.

Press **Enter**.

ENTER BUDGET AND FUND FOR RECORD RETRIEVAL

05/19/00
10:11:55.5

IBIS FINANCIAL MAINTENANCE SYSTEM
UPDATE FRINGE/TUITION ACCOUNT

UFTA
JWD1

Acct#: - - Contract Fund#:
Agreement: Prime#:
Sponsor/Agency: Agreement Period#:

Fringe Charged to another Acct (Y/N): _
Fringe Acct#: _ - _ - _ - _ -

Tuition Charged to another Acct (Y/N): _
Tuition Acct#: _ - _ - _ - _ -

NEXT ACCT#: **1** - **UP 100 10_ 05 / 19 / 2000**
NEXT FUNCTION: _____ **<MENU,KEYS,END>**

1. At **Next Acct#**, enter the budget and fund you want to update.

Example:

Enter the budget and fund 4-28-54 UP 6521 as 04 028 54 UP 65210.

Press **Enter** to pull up the budget and fund entered.

```
ENTER BUDGET AND FUND FOR RECORD RETRIEVAL
05/19/00          IBIS FINANCIAL MAINTENANCE SYSTEM          UFTA
10:23:13.0      UPDATE FRINGE/TUITION ACCOUNT              JWD1

      Acct#: 04-028-54 UP 65210          Contract Fund#: 65210
      Agreement: DMR 91-10754          Prime#:
      Sponsor/Agency: NATL SCI FDN    Agreement Period#:

2 Fringe Charged to another Acct (Y/N): N
      3 Fringe Acct#:  _ -  _ -  _ -  _ -

4 Tuition Charged to another Acct (Y/N): N
      5 Tuition Acct#:  _ -  _ -  _ -  _ -

      NEXT ACCT#: 04 - 028 - 54 UP 65210_    05 / 19 / 2000
NEXT FUNCTION: _____ <MENU,KEYS,END>
```

2. At **Fringe Charged to another Acct**, update the information if it is different than the current information.
3. At **Fringe Acct #**, update the information if it is different than the current information.
4. At **Tuition Charged to another Acct**, update the information if it is different than the current information.
5. At **Tuition Acct #**, update the information if it is different than the current information.

Press **Enter** to update the **Fringe/Tuition Account**.

05/19/00
11:14:43.9

INTEGRATED BUSINESS INFORMATION SYSTEM

M1M1
JWD1

Any of the functions included in this system can be invoked by entering the corresponding function code on the command line next to 'NEXT FUNCTION:'. The following functions are available:

FUNCTION	DESCRIPTION	FUNCTION	DESCRIPTION
FORM	Help Selecting HRS Forms	M2PI	Property Inventory
M2AH	IBIS Adhoc Functions	M2PR	Purchasing System
M2AS	EASY Elec. Appr. System	M2VA	Vendor System
M2BG	Budgeting System	BAMM	Budget Planning: BudAuto
M2FN	Financial System	M2IM	Inventory Management
M2FS	Facilities System	CODE	Codeset Maint. System
M2HR	Human Resources System	M2NC	Nat Conn. Applications
M2PA	Payroll System	M2PE	Pay & Effort Functions

NEXT FUNCTION: **IBIL** **1** **PREV MENU:** NONE
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP MENU CMPS END KEYS PRNT .

1. At **Next Function**, type **IBIL**.

Press **Enter**.

ENTER BUDGET AND FUND FOR RECORD RETRIEVAL

05/19/00
11:16:42.8

IBIS FINANCIAL MAINTENANCE SYSTEM
Contract Billing Inquiry

IBIL
JWD1

Acct#: - - Contract Fund#:
Agreement: Prime#:
Sponsor/Agency: Agreement Period#:
Billing (Line 1):
Address (Line 2):
(Line 3):
(Line 4):
(Line 5):
(Line 6):
(Line 7):
(Line 8):
City: State:
Zip: - Country:
Contact Person: Phone: - -
Elec-Mail ID: Fax: - -
Accountant ID:

NEXT ACCT#: **1** - **UP 100 10_ 05 / 19 / 2000**
NEXT FUNCTION: _____ **<MENU,KEYS,END>**

1. At **Next Acct#**, enter the budget and fund you want to view.

Example:

Enter the budget and fund 4-28-54 UP 6521 as 04 028 54 UP 65210.

Press **Enter**.

```
05/19/00          IBIS FINANCIAL MAINTENANCE SYSTEM          IBIL
11:19:56.0      Contract Billing Inquiry ←                 JWD1

      Acct#: 04-028-54 UP 65210          Contract Fund#: 65210
      Agreement: DMR 91-10754           Prime#:
      Sponsor/Agency: NATL SCI FDN     Agreement Period#:

Billing (Line 1):
Address (Line 2):
      (Line 3):
      (Line 4):
      (Line 5):
      (Line 6):
      (Line 7):
      (Line 8):
      City:                               State:
      Zip: -                               Country:
Contact Person:                           Phone: - -
      Elec-Mail ID:                       Fax: - -
      Accountant ID:

NEXT ACCT#: 04 - 028 - 54 UP 65210_ 05 / 19 / 2000
NEXT FUNCTION: _____ (MENU, KEYS, END)
```

The billing information that you requested will appear on the **Contract Billing Inquiry** screen.

Contract Payor Inquiry Screen — (IPYR)

05/19/00
11:23:31.1

INTEGRATED BUSINESS INFORMATION SYSTEM

M1M1
JWD1

Any of the functions included in this system can be invoked by entering the corresponding function code on the command line next to 'NEXT FUNCTION:'. The following functions are available:

FUNCTION	DESCRIPTION	FUNCTION	DESCRIPTION
FORM	Help Selecting HRS Forms	M2PI	Property Inventory
M2AH	IBIS Adhoc Functions	M2PR	Purchasing System
M2AS	EASY Elec. Appr. System	M2VA	Vendor System
M2BG	Budgeting System	BAMM	Budget Planning: BudAuto
M2FN	Financial System	M2IM	Inventory Management
M2FS	Facilities System	CODE	Codeset Maint. System
M2HR	Human Resources System	M2NC	Nat Conn. Applications
M2PA	Payroll System	M2PE	Pay & Effort Functions

NEXT FUNCTION: IPYR **PREV MENU: NONE**
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP MENU CMPS END KEYS PRINT .

1. At **Next Function**, type **IPYR**.

Press **Enter**.

ENTER BUDGET AND FUND FOR RECORD RETRIEVAL

05/19/00
11:25:37.6

IBIS FINANCIAL MAINTENANCE SYSTEM
Contract Payor Inquiry

IPYR
JWD1

Acct#: - - Contract Fund#:
Agreement: Prime#:
Sponsor/Agency: Agreement Period#:
Payor (Line 1):
Address (Line 2):
(Line 3):
(Line 4):
(Line 5):
(Line 6):
(Line 7):
(Line 8):
City: State:
Zip: - Country:
Contact Person:
Phone: - - FAX: - -
Elec-mail ID:

NEXT ACCT#: **1** - **UP 100 10_ 05 / 19 / 2000**
NEXT FUNCTION: **(MENU,KEYS,END)**

1. At **Next Acct#**, enter the budget and fund you want to view.

Example:

Enter the budget and fund 4-28-54 UP 6521 as 04 028 54 UP 65210.

Press **Enter**.

```
05/19/00          IBIS FINANCIAL MAINTENANCE SYSTEM          IPYR
11:28:01.9          Contract Payor Inquiry ←                 JWD1

      Acct#: 04-028-54 UP  65210          Contract Fund#: 65210
      Agreement: DMR 91-10754          Prime#:
      Sponsor/Agency: NATL SCI FDN          Agreement Period#:

Payor  (Line 1):
Address (Line 2):
      (Line 3):
      (Line 4):
      (Line 5):
      (Line 6):
      (Line 7):
      (Line 8):
      City:                               State:
      Zip: -                               Country:
Contact Person:
      Phone: - -                           FAX: - -
      Elec-mail ID:

NEXT ACCT#: 04 - 028 - 54 UP 65210_  05 / 19 / 2000
NEXT FUNCTION: _____ (MENU,KEYS,END)
```

The payor information that you requested will appear on the **Contract Payor Inquiry** screen.

Subcontract Inquiry Screen — (ISUB)

05/19/00
14:37:34.2

INTEGRATED BUSINESS INFORMATION SYSTEM

M1M1
JWD1

Any of the functions included in this system can be invoked by entering the corresponding function code on the command line next to 'NEXT FUNCTION:'. The following functions are available:

FUNCTION	DESCRIPTION	FUNCTION	DESCRIPTION
FORM	Help Selecting HRS Forms	M2PI	Property Inventory
M2AH	IBIS Adhoc Functions	M2PR	Purchasing System
M2AS	EASY Elec. Appr. System	M2VA	Vendor System
M2BG	Budgeting System	BAMM	Budget Planning: BudAuto
M2FN	Financial System	M2IM	Inventory Management
M2FS	Facilities System	CODE	Codeset Maint. System
M2HR	Human Resources System	M2NC	Nat Conn. Applications
M2PA	Payroll System	M2PE	Pay & Effort Functions

NEXT FUNCTION: ISUB **1** **PREV MENU: NONE**
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP MENU CMPS END KEYS PRNT . |

1. At **Next Function**, type **ISUB**.

Press **Enter**.

ENTER BUDGET AND FUND FOR RECORD RETRIEVAL

05/19/00 **IBIS FINANCIAL MAINTENANCE SYSTEM** ISUB
14:39:54.8 **SubContract Information Inquiry** JWD1

Acct#: - - Contract Fund#:
Agreement: Prime#:
Sponsor/Agency: Document#:
Agreement Period#:

Contractor Sub- Prime SPC0 Contractor Sub- Prime SPC0
Contractor Contractor Agmt Code Contractor Contractor Agmt Code

NEXT ACCT#: **1** - **UP 100 10_ 05 / 19 / 2000**
NEXT FUNCTION: **(MENU,KEYS,END)**

1. At **Next Acct#**, enter the budget and fund you want to view.

Example:

Enter the budget and fund 4-28-54 UP 6521 as 04 028 54 UP 65210.

Press **Enter**.

```
05/19/00          IBIS FINANCIAL MAINTENANCE SYSTEM          ISUB
14:43:37.9       SubContract Information Inquiry          JWD1

  Acct#: 04 - 028 - 54 UP 65210      Contract Fund#: 65210
  Agreement: DMR 91-10754             Prime#:
  Sponsor/Agency: NATL SCI FDN       Document#: 91-10754
                                       Agreement Period#:
Contractor   Sub-   Prime   SPCO   Contractor   Sub-   Prime   SPCO
            Contractor Agmt   Code           Contractor Agmt   Code

NEXT ACCT#: 04 - 028 - 54 UP 65210_   05 / 19 / 2000
NEXT FUNCTION: _____ (MENU,KEYS,END)
```

The subcontract information that you requested will appear on the **Subcontract Inquiry** screen.

Update Deliverable and Project Investigator Screen — (UDPI)

05/19/00
14:48:58.7

INTEGRATED BUSINESS INFORMATION SYSTEM

M1M1
JWD1

Any of the functions included in this system can be invoked by entering the corresponding function code on the command line next to 'NEXT FUNCTION:'. The following functions are available:

FUNCTION	DESCRIPTION	FUNCTION	DESCRIPTION
FORM	Help Selecting HRS Forms	M2PI	Property Inventory
M2AH	IBIS Adhoc Functions	M2PR	Purchasing System
M2AS	EASY Elec. Appr. System	M2VA	Vendor System
M2BG	Budgeting System	BAMM	Budget Planning: BudAuto
M2FN	Financial System	M2IM	Inventory Management
M2FS	Facilities System	CODE	Codeset Maint. System
M2HR	Human Resources System	M2NC	Nat Conn. Applications
M2PA	Payroll System	M2PE	Pay & Effort Functions

NEXT FUNCTION: UDPI **PREV MENU:** NONE
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP MENU CMPS END KEYS PRNT .

1. At **Next Function**, type **UDPI**.

Press **Enter**.

ENTER BUDGET AND FUND FOR RECORD RETRIEVAL

05/19/00
15:16:38.9

IBIS FINANCIAL MAINTENANCE SYSTEM
Update Deliverable and Project Investigator

UDPI
JWD1

Acct#: - - Contract Fund#:
Agreement: Prime#:
Sponsor/Agency: Agreement Period#:
Est Del Due Date: 00 / 00 / 0000 Deliver Sub Date: 00 / 00 / 0000

	LAST NAME	FI MI	SSN	ACCESS ID PI	FINAN. ACCESS
CORR:	_____	, - -	_____	_____	- -
INUS:	_____	, - -	_____	_____	- -
	_____	, - -	_____	_____	- -
	_____	, - -	_____	_____	- -
	_____	, - -	_____	_____	- -
	_____	, - -	_____	_____	- -
	_____	, - -	_____	_____	- -
	_____	, - -	_____	_____	- -
	_____	, - -	_____	_____	- -

NEXT ACCT#: 1 - UP 100 10 05 / 19 / 2000
NEXT FUNCTION: _____ (MENU, KEYS, END)

1. At **Next Acct#**, enter the budget and fund you want to update.

Example:

Enter the budget and fund 4-28-54 UP 6521 as 04 028 54 UP 65210.

> Note:

This information should be updated by the department.

Press **Enter**.

```
ENTER BUDGET AND FUND FOR RECORD RETRIEVAL
05/19/00          IBS FINANCIAL MAINTENANCE SYSTEM          UDP1
15:19:33.2       Update Deliverable and Project Investigator  JWD1

      Acct#: 04-028-54 UP 65210          Contract Fund#: 65210
      Agreement: DMR 91-10754          Prime#:
      Sponsor/Agency: NATL SCI FDN     Agreement Period#:

Est Del Due Date: 00 1 00 / 0000      Deliver Sub Date: 00 / 2 / 0000

CORR: _____, - - 000 00 0000    5  N  N
INVS: _____, - - 000 00 0000    _____ 4  N
_____, - - 000 00 0000    _____  N
_____, - - 000 00 0000    _____  N
_____, - - 000 00 0000    _____  N
_____, - - 000 00 0000    _____  N
_____, - - 000 00 0000    _____  N
_____, - - 000 00 0000    _____  N
_____, - - 000 00 0000    _____  N
_____, - - 000 00 0000    _____  N

NEXT ACCT#: 04 - 028 - 54 UP 65210_    05 / 19 / 2000
NEXT FUNCTION: _____ <MENU,KEYS,END>
```

1. At **Est Del Due Date**, enter the new estimated date the first deliverable is due, if it is different than the current information.
2. At **Deliver Sub Date**, enter the delivery submit date when you have submitted the technical report.
3. At **Project Corr**, enter the social security number of new project correspondent, if it is different than the current information.
4. At **P.I.**, indicate whether the project correspondent is also a project investigator, if it is different than the current information.
5. At **Finan. Access**, indicate whether the project correspondent and/or the project investigators should (Y) or should not (N) be given security access to the account

and its cost centers (if applicable) on Web FIT.

6. At **Projec Invs**, enter the social security number(s) of the project investigator(s), if it different than the current information.

Press **Enter** to update the **Deliverable and Project Investigator** screen.

Additional AURA Documentation

- Introduction to the AURA Form
- Locating the Financial Accounting Maintenance System
- Use of the AURA Form without a Clone
- Use of the AURA Form with a Clone
- Accounts and Fund System Screens
- Agency/Subagency System Screens

Last Revised: 10/27/2003