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**
   - Introduction
   - Structure of AURA
   - How to Pull Up a Blank Form

II. **Locating the Financial Accounting Maintenance System**

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 — Page 8
   - Research Incentive Distribution — Page 9
   - Notepad Area Screen — Page 10

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
   - Indicators and Reports Screen — Page 3
   - Principle Investigator — Page 8
   - Research Incentive Distribution — Page 9
   - Notepad Area Screen — Page 10
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
A 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.
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:
1. At **Next Function** on the **M1M1** screen (IBIS Main Menu), type **M2FN**.

Press **Enter**.

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
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**

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**

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.
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.).

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

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**

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.
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**

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.
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%.

---

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
  - Indicators and Reports Screen — Page 3
  - Principle Investigator — Page 8
  - Research Incentive Distribution — Page 9
  - Notepad Area Screen—Page 10

---

**AURA Cover Screen**

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.
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:**
   
   — 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.).

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

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.
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
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.
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**

<table>
<thead>
<tr>
<th>FORM ACTION</th>
<th>DOCUMENT#</th>
<th>UNIT</th>
<th>CONFIDENTIAL:</th>
<th>NEXT APPROVER</th>
<th>EFF DATE</th>
<th>STATUS</th>
<th>ACCT#</th>
<th>UP</th>
<th>ADMIN AREA#</th>
<th>BUDG</th>
<th>SPON/AGY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

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**

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 then 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%.

---

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
AURA: Accounts and Fund System Screens

This document contains the following information:

- **V. Accounts and Fund System Screens**
  - Account Data Inquiry Screen (IACT)
  - Account Match Inquiry Screen (IAMI)
  - Fund Data Inquiry Screen (IFND)
  - Department Account Match Update Screen (UDMI)

---

**Account Data Inquiry Screen — (IACT)**

1. At Next Function, type IACT.
   
   Press Enter.
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.
The account information that was requested will appear in the **Account Data Inquiry** screen.

---

**Account Match Inquiry Screen — (IAMI)**
1. At Next Function, type IAM1.

Press Enter to pull up the Account Match Inquiry screen.

1. At Next Acct#, enter the budget and fund you want to view.
**Example:**
Enter budget and fund 1-42-44 UP 3260 as 01 042 44 UP 264500.

Press **Enter** to view the account matching funds.

The matching account information requested will appear on the Accounts Matching Inquiry screen.

---

**Fund Data Inquiry Screen — (IFND)**
1. At **Next Function**, type **IFND**.

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

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.

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

---

**Department Account Match Update Screen — (UDMI)**
1. At **Next Function**, type **UDMI**.

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

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.

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.
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
VI. Agency/Subagency System Screens

- Browse Agencies By Agency Name (BAGY)
- Browse Agencies By Agency Code (BAGC)
- Browse Subagencies By Subagency Name (BSGY)
- Browse Subagencies By Subagency Code (BSGC)

---

browse agencies by name — (BAGY)

1. At Next Function, type BAGY.

Press Enter.
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.
Press PF12 to return to the Browse Agency by Name screen.

---

**Browse Agencies by Agency Code — (BAGC)**

<table>
<thead>
<tr>
<th>FUNCTION</th>
<th>DESCRIPTION</th>
<th>FUNCTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>FORM</td>
<td>Help Selecting HRS Forms</td>
<td>M2P1</td>
<td>Property Inventory</td>
</tr>
<tr>
<td>M2AH</td>
<td>IBIS Adhoc Functions</td>
<td>M2PR</td>
<td>Purchasing System</td>
</tr>
<tr>
<td>M2AS</td>
<td>EASY Elec. Appr. System</td>
<td>M2UR</td>
<td>Vendor System</td>
</tr>
<tr>
<td>M2BG</td>
<td>Budgeting System</td>
<td>BANM</td>
<td>Budget Planning: BudAuto</td>
</tr>
<tr>
<td>M2FN</td>
<td>Financial System</td>
<td>M2IM</td>
<td>Inventory Management</td>
</tr>
<tr>
<td>M2FS</td>
<td>Facilities System</td>
<td>CODE</td>
<td>Codeset Maint. System</td>
</tr>
<tr>
<td>M2HR</td>
<td>Human Resources System</td>
<td>M2NC</td>
<td>Nat Conn. Applications</td>
</tr>
<tr>
<td>M2PA</td>
<td>Payroll System</td>
<td>M2PE</td>
<td>Pay &amp; Effort Functions</td>
</tr>
</tbody>
</table>

**NEXT FUNCTION:** BAGC  
**PREV MENU:** NONE
1. At **Next Function**, type BAGC.

Press **Enter**.

![IBIS Financial Maintenance System](image)

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.
Press **PF12** to return to the **Browse by Agency Code** screen.

---

**Browse Subagencies by Subagency Name — (BSGY)**

---

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:

<table>
<thead>
<tr>
<th>FUNCTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>FORM</td>
<td>Help Selecting HRS Forms</td>
</tr>
<tr>
<td>M2AH</td>
<td>IBIS Adhoc Functions</td>
</tr>
<tr>
<td>M2AS</td>
<td>EASY Elec. Appr. System</td>
</tr>
<tr>
<td>M2BG</td>
<td>Budgeting System</td>
</tr>
<tr>
<td>M2FN</td>
<td>Financial System</td>
</tr>
<tr>
<td>M2FS</td>
<td>Facilities System</td>
</tr>
<tr>
<td>M2HR</td>
<td>Human Resources System</td>
</tr>
<tr>
<td>M2PA</td>
<td>Payroll System</td>
</tr>
</tbody>
</table>

---

**NEXT FUNCTION: BSgy**
1. At **Next Function**, type BSGY.

Press **Enter**.

---

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

Browse Subagencies by Subagency Code — (BSGC)
1. At **Next Function**, type BSGC.

   Press **Enter**.

![IBIS Finance Maintenance System Subagency Code Browse]

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.
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
AURA: Contract Information System Screens

This document contains the following information:

- VII. Contract Information System Screens
  - Contract Information A Inquiry Screen (ICNA)
  - Contract Information B Inquiry Screen (ICNB)
  - Contract Tuition/Fringe Inquiry Screen (IFRG)
  - Update Fringe/Tuition Account Screen (UFTA)
  - Project Information Inquiry Screen (IPRJ)
  - Contract Billing Inquiry Screen (IBIL)
  - Contract Payor Inquiry Screen (IPYR)
  - Subcontract Inquiry Screen (ISUB)
  - Update Deliverable & Project Investigator Screen (UDPI)

---

Contract Information 'A' Inquiry Screen — (ICNA)

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

   Press **Enter**.

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**.

---

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

   Press **Enter**.

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**.

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

---

**Update Fringe/Tuition Account Screen — (UFTA)**
1. At **Next Function**, type **UFTA**.

   Press **Enter**.

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.

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.
1. At Next Function, type IPRJ.

Press Enter.
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**.

The project information that you requested will appear on the **Project Information Inquiry** screen.

---

**Contract Billing Inquiry Screen — (IBIL)**
1. At Next Function, type IBIL.

Press Enter.

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.

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

---

Contract Payor Inquiry Screen — (IPYR)
1. At Next Function, type **IPYR**.

Press Enter.

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.

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

Subcontract Inquiry Screen — (ISUB)
1. At **Next Function**, type **ISUB**.

Press **Enter**.

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.

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

Update Deliverable and Project Investigator Screen — (UDPI)
1. At **Next Function**, type **UDPI**.

   Press **Enter**.

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.

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