



ADDY NOTE

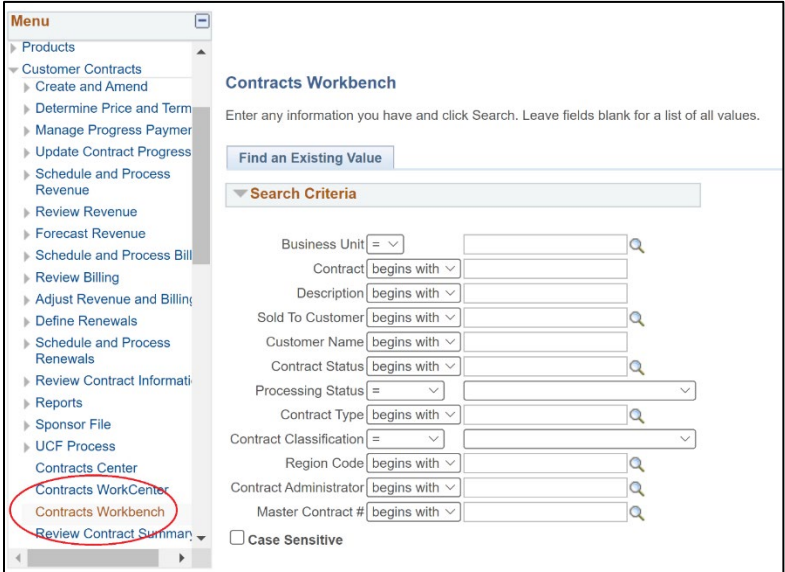


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ATTENTION:
This Addy Note is a procedural resource for the UCF Financials Reference Database, which only contains data prior to July 1, 2022.

Contracts Workbench Award Inquiries and Projects

This document describes the process to inquire about an award and its projects via Contracts Workbench. The Contracts Workbench is a tool used to analyze PeopleSoft contracts and projects data.

Step	Action
1.	<p>Navigate to Customer Contracts > Contracts Workbench.</p> 



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2.	<p>Enter the Business Unit and Contract number and click Search.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Contracts Workbench</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p style="background-color: #e0e0e0; padding: 2px;">Find an Existing Value</p> <p style="background-color: #e0e0e0; padding: 2px;">▼ Search Criteria</p> <div style="border: 1px solid red; padding: 5px; margin: 5px 0;"> <p>Business Unit [=] [] [🔍]</p> <p>Contract [begins with] [] [🔍]</p> <p>Description [begins with] [] [🔍]</p> <p>Sold To Customer [begins with] [] [🔍]</p> <p>Customer Name [begins with] [] [🔍]</p> <p>Contract Status [begins with] [] [🔍]</p> <p>Processing Status [=] [] [▼]</p> <p>Contract Type [begins with] [] [🔍]</p> <p>Contract Classification [=] [] [▼]</p> <p>Region Code [begins with] [] [🔍]</p> <p>Contract Administrator [begins with] [] [🔍]</p> <p>Master Contract # [begins with] [] [🔍]</p> <p><input type="checkbox"/> Case Sensitive</p> </div> </div>																
3.	<p>Scroll down the Contracts Workbench page to view all available contract-related data grids for Contract Lines, Contract Rates and Contract Limits.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Contracts Workbench</p> <p>Contract Number AWD00001400 Currency USD Contract Signed 07/19/2021</p> <p>Contract Type CNG Business Unit UCF01 Amendment Number 000000000</p> <p>Contract Class Standard Region Code Amendment Date</p> <p>Contract Status ACTIVE Customer Georgia Institute of Technology Additional Amounts</p> <p style="background-color: #e0e0e0; padding: 2px;">▶ Summary of Amounts</p> <p style="background-color: #e0e0e0; padding: 2px;">▼ Contracts Data</p> <div style="border: 1px solid red; border-radius: 50%; padding: 5px; display: inline-block; margin: 5px 0;"> <p style="background-color: #e0e0e0; padding: 2px;">▼ Contract Lines</p> <p style="background-color: #e0e0e0; padding: 2px;">Line Details [🔍]</p> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th>Contract</th> <th>Contract Line Num</th> <th>Amendment Number</th> <th>Revenue Plan</th> <th>Billing Plan ID</th> <th>Address Sequence Number</th> <th>Allocation In Progress</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1 AWD00001400</td> <td>1</td> <td></td> <td>R101</td> <td>B101</td> <td>4</td> <td><input type="checkbox"/></td> <td>As Incurred</td> </tr> </tbody> </table> </div>	Contract	Contract Line Num	Amendment Number	Revenue Plan	Billing Plan ID	Address Sequence Number	Allocation In Progress	Description	1 AWD00001400	1		R101	B101	4	<input type="checkbox"/>	As Incurred
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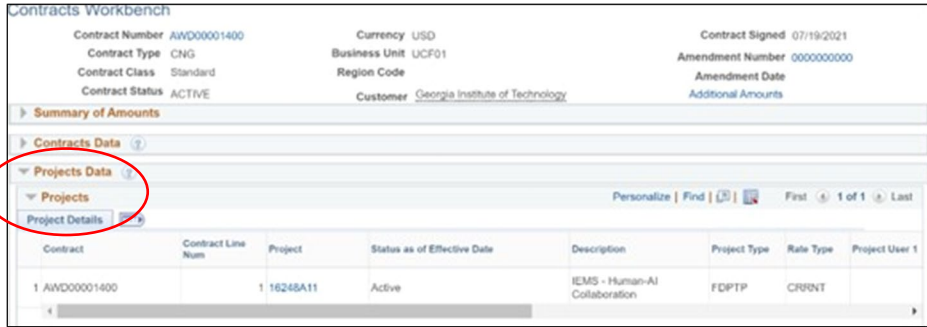
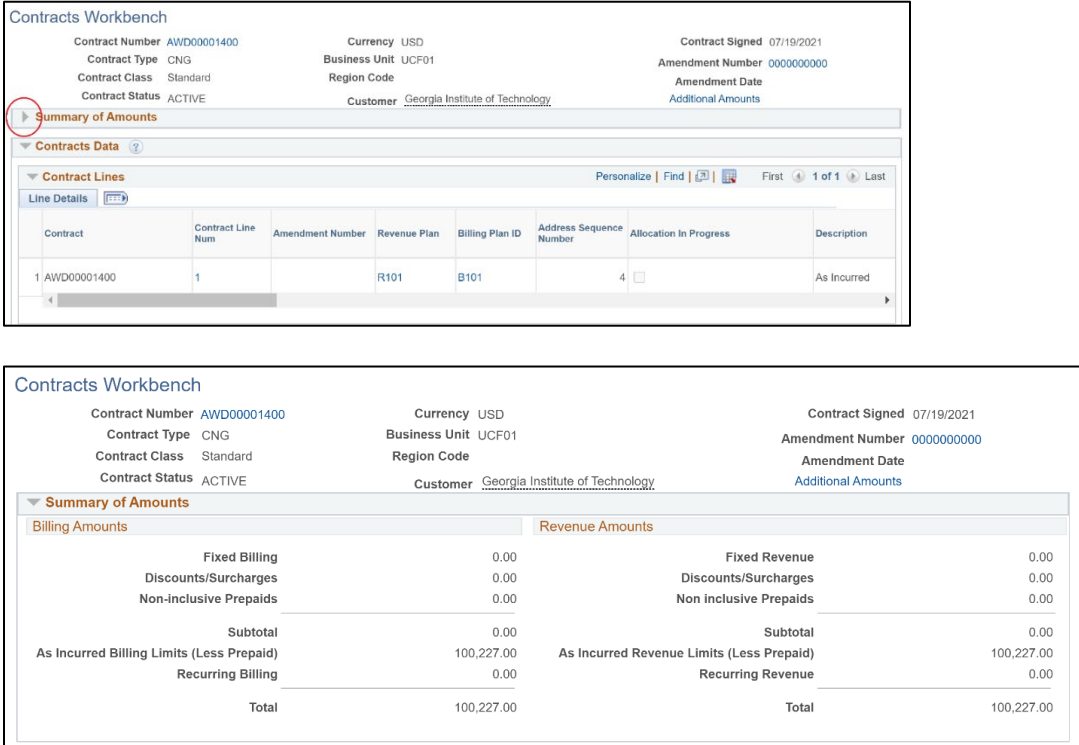


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4.	<p>Scroll further down the Contracts Workbench page to view all available project-related data grids for Projects, Project Activities and Project Status.</p>  <p>The screenshot shows the 'Contracts Workbench' interface for contract AWD00001400. The 'Summary of Amounts' group box is expanded, and the 'Projects Data' sub-section is highlighted with a red circle. Below it, the 'Project Details' table is visible, showing one project entry: Contract Line Num 1, Project 16248A11, Status as of Effective Date Active, Description IEMS - Human-AI Collaboration, Project Type FDPTP, Rate Type CRFNT, and Project User 1.</p>																																
5.	<p>Press the Down Arrow to expand the Summary of Amounts group box for a summary of billing and revenue amounts.</p>  <p>The first screenshot shows the 'Summary of Amounts' group box expanded, with a red circle around the 'Summary of Amounts' header. The 'Contract Lines' table below shows one line item: Contract Line Num 1, Amendment Number R101, Billing Plan ID B101, Address Sequence Number 4, Allocation In Progress (checkbox), and Description As Incurred.</p> <p>The second screenshot shows the 'Summary of Amounts' group box expanded further to display a detailed table of Billing and Revenue amounts:</p> <table border="1"> <thead> <tr> <th colspan="2">Billing Amounts</th> <th colspan="2">Revenue Amounts</th> </tr> </thead> <tbody> <tr> <td>Fixed Billing</td> <td>0.00</td> <td>Fixed Revenue</td> <td>0.00</td> </tr> <tr> <td>Discounts/Surcharges</td> <td>0.00</td> <td>Discounts/Surcharges</td> <td>0.00</td> </tr> <tr> <td>Non-inclusive Prepays</td> <td>0.00</td> <td>Non inclusive Prepays</td> <td>0.00</td> </tr> <tr> <td>Subtotal</td> <td>0.00</td> <td>Subtotal</td> <td>0.00</td> </tr> <tr> <td>As Incurred Billing Limits (Less Prepaid)</td> <td>100,227.00</td> <td>As Incurred Revenue Limits (Less Prepaid)</td> <td>100,227.00</td> </tr> <tr> <td>Recurring Billing</td> <td>0.00</td> <td>Recurring Revenue</td> <td>0.00</td> </tr> <tr> <td>Total</td> <td>100,227.00</td> <td>Total</td> <td>100,227.00</td> </tr> </tbody> </table>	Billing Amounts		Revenue Amounts		Fixed Billing	0.00	Fixed Revenue	0.00	Discounts/Surcharges	0.00	Discounts/Surcharges	0.00	Non-inclusive Prepays	0.00	Non inclusive Prepays	0.00	Subtotal	0.00	Subtotal	0.00	As Incurred Billing Limits (Less Prepaid)	100,227.00	As Incurred Revenue Limits (Less Prepaid)	100,227.00	Recurring Billing	0.00	Recurring Revenue	0.00	Total	100,227.00	Total	100,227.00
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6.	<p>Click the Additional Amounts hyperlink to open the Additional Amounts window, which displays additional contract and award amounts.</p> <div data-bbox="331 558 1230 873" data-label="Complex-Block"> <p>Contracts Workbench</p> <p>Contract Number AWD00001400 Currency USD Contract Signed 07/19/2021 Contract Type CNG Business Unit UCF01 Amendment Number 000000000 Contract Class Standard Region Code Amendment Date Contract Status ACTIVE Customer Georgia Institute of Technology Additional Amounts</p> <p>▼ Summary of Amounts</p> <table border="1"> <thead> <tr> <th colspan="2">Billing Amounts</th> <th colspan="2">Revenue Amounts</th> </tr> </thead> <tbody> <tr> <td>Fixed Billing</td> <td>0.00</td> <td>Fixed Revenue</td> <td>0.00</td> </tr> <tr> <td>Discounts/Surcharges</td> <td>0.00</td> <td>Discounts/Surcharges</td> <td>0.00</td> </tr> <tr> <td>Non-inclusive Prepays</td> <td>0.00</td> <td>Non Inclusive Prepays</td> <td>0.00</td> </tr> <tr> <td>Subtotal</td> <td>0.00</td> <td>Subtotal</td> <td>0.00</td> </tr> <tr> <td>As Incurred Billing Limits (Less Prepaid)</td> <td>100,227.00</td> <td>As Incurred Revenue Limits (Less Prepaid)</td> <td>100,227.00</td> </tr> <tr> <td>Recurring Billing</td> <td>0.00</td> <td>Recurring Revenue</td> <td>0.00</td> </tr> <tr> <td>Total</td> <td>100,227.00</td> <td>Total</td> <td>100,227.00</td> </tr> </tbody> </table> </div> <div data-bbox="331 915 1284 1501" data-label="Complex-Block"> <p>Additional Amounts</p> <p>Contract Amounts</p> <table border="1"> <tbody> <tr> <td>Total Billed</td> <td>1,908.670</td> </tr> <tr> <td>Total Collected</td> <td>526.460</td> </tr> <tr> <td>Total Revenue Recognized</td> <td>7,267.400</td> </tr> <tr> <td>Revenue Forecasted</td> <td>0.000</td> </tr> </tbody> </table> <p>Award Amounts</p> <table border="1"> <tbody> <tr> <td>Total Projected Award Amount</td> <td>100,227.000</td> </tr> <tr> <td>Total Reported Award Amount</td> <td>100,227.000</td> </tr> <tr> <td>Total Posted Budget Amount</td> <td>100,227.000</td> </tr> <tr> <td>Total Limit Amount</td> <td>100,227.000</td> </tr> </tbody> </table> <p>Return</p> </div>	Billing Amounts		Revenue Amounts		Fixed Billing	0.00	Fixed Revenue	0.00	Discounts/Surcharges	0.00	Discounts/Surcharges	0.00	Non-inclusive Prepays	0.00	Non Inclusive Prepays	0.00	Subtotal	0.00	Subtotal	0.00	As Incurred Billing Limits (Less Prepaid)	100,227.00	As Incurred Revenue Limits (Less Prepaid)	100,227.00	Recurring Billing	0.00	Recurring Revenue	0.00	Total	100,227.00	Total	100,227.00	Total Billed	1,908.670	Total Collected	526.460	Total Revenue Recognized	7,267.400	Revenue Forecasted	0.000	Total Projected Award Amount	100,227.000	Total Reported Award Amount	100,227.000	Total Posted Budget Amount	100,227.000	Total Limit Amount	100,227.000
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