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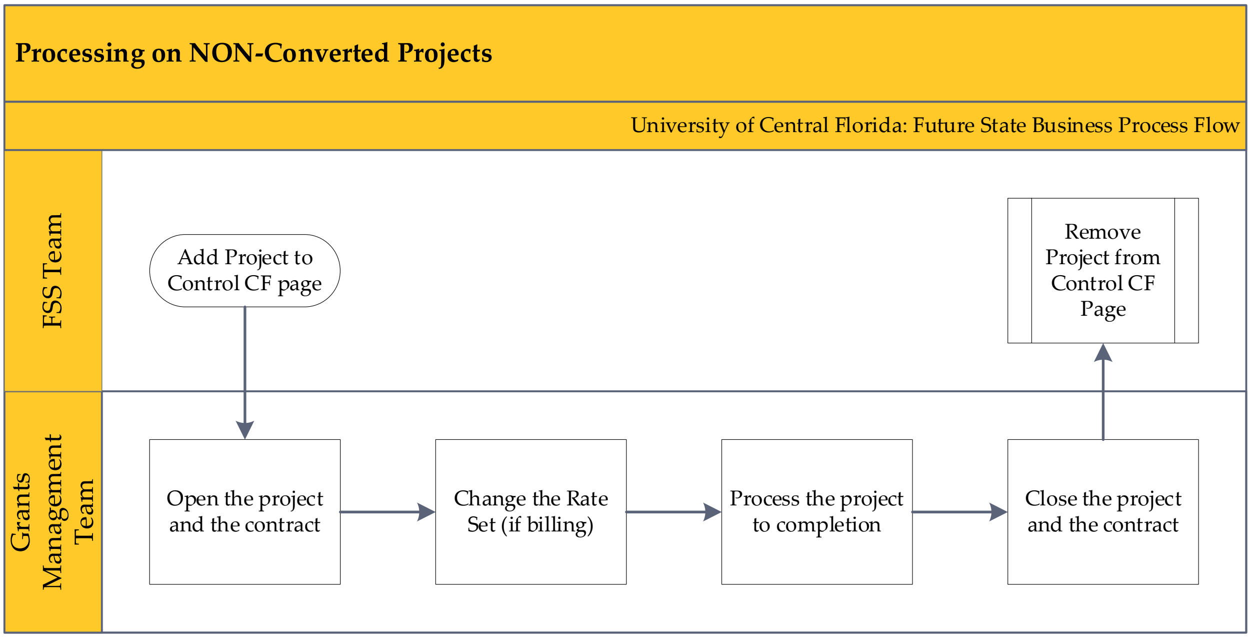
COURSE 5. PROCESS NON-CONVERTED PROJECTS

I. NON-CONVERTED PROJECTS WITH NON-MATERIAL CHANGES

When a cleanup project was set up but action is required on a non-converted project before it can be closed, do the following so that the award can be closed:

Step	Action
1.	Process data through a cleanup project.
2.	Record the action by making a note on the actual project files.

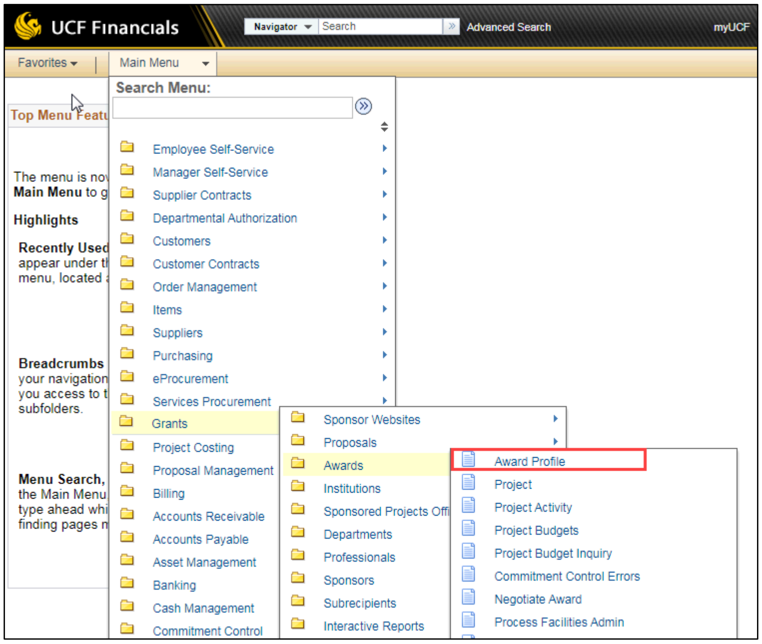


II. NON-CONVERTED PROJECTS WITH MATERIAL CHANGES

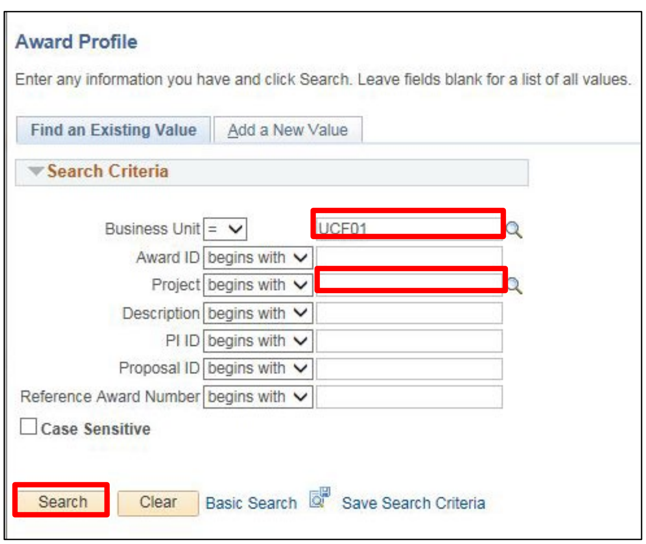
When a non-converted project does not need to be in the Huron Research Suite (HRS) and action is required before it can be closed, it will be processed on the old chartstring so that the award can be closed. If the project will not be closed immediately after minor processing, a new project needs to be set up. To process on the old chartstring, do the following:

Step	Action
1.	Open the **Project** and **Contract** to process on the old chartstring. *Note: If it is necessary to bill the project, complete steps 2-10 to update the **Rate Set** of the contract. Otherwise, skip to step 14.*

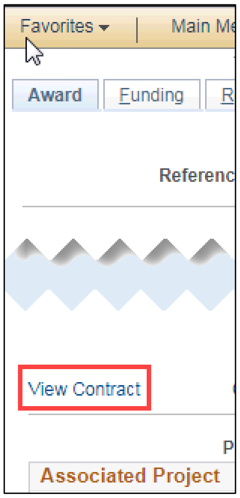
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2.</td><td>Navigate to Main Menu > Customer Contracts > Create and Amend.


</td></tr>
<tr><td>3.</td><td>Enter values in the following fields:

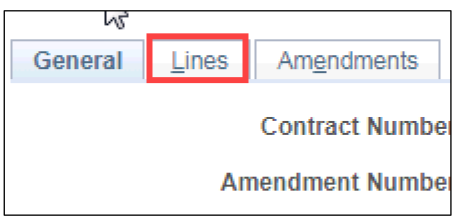
a) Business Unit
b) Project (Project ID)


</td></tr>
<tr><td>4.</td><td>Click Search. (See image in previous steps.)</td></tr>
</table>

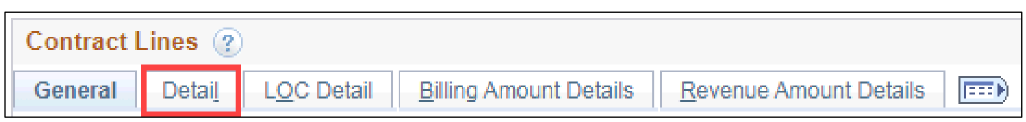
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5.</td><td>Click the Contract link.



</td></tr>
<tr><td>6.</td><td>Select the Lines tab.

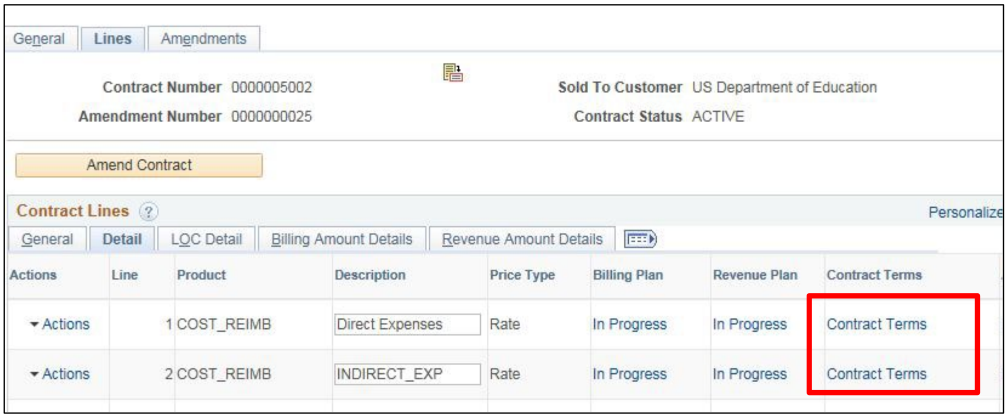


</td></tr>
<tr><td>7.</td><td>Under the Contract Terms heading, select the Detail tab.



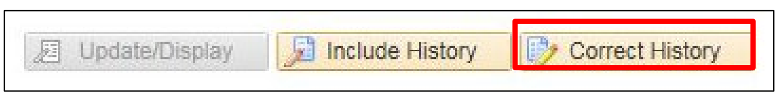
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8.</td><td>Click the Contract Terms link under the Contract Terms column.

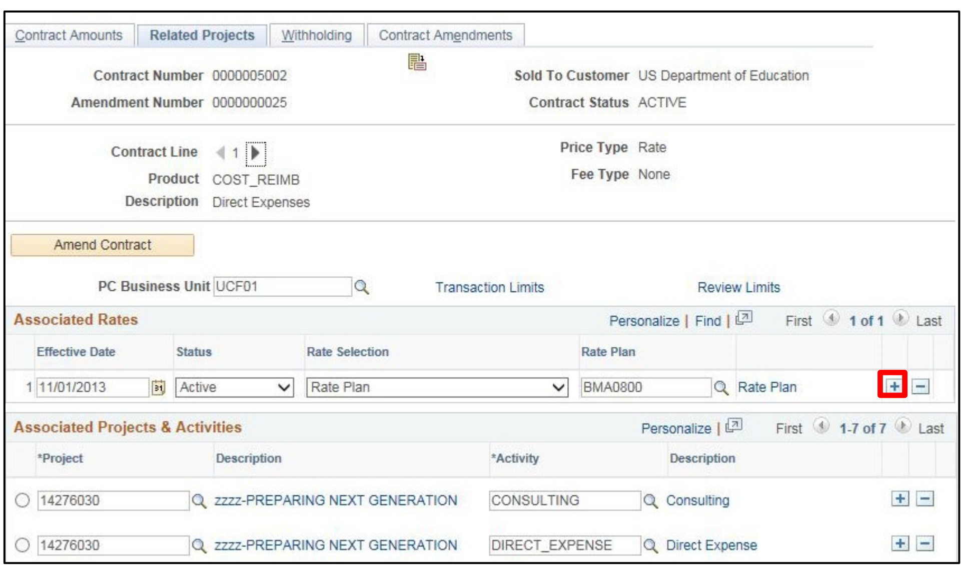


</td></tr>
<tr><td>9.</td><td>Select the Related Projects tab.

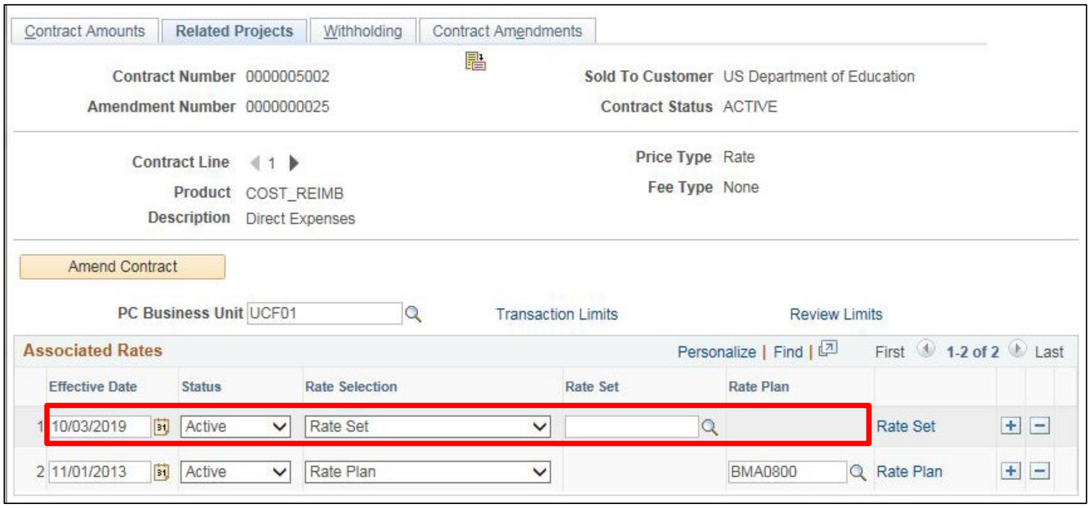
</td></tr>
<tr><td>10.</td><td>Click the Correct History button.



</td></tr>
<tr><td>11.</td><td>Click the plus sign (+) to add a new effective dated rates row.



</td></tr>
</table>

Step	Action
12.	Enter values in the following fields: a) **Effective Date** b) **Status** c) **Rate Selection** [**Rate Set**] d) **Rate Set** [**GM_RATE**] 
13.	Click **Save**.
14.	Navigate to **Main Menu** > **Grants** > **Awards** > **Award Profile** to update fields on the correct contract line that must be changed or the interface will fail. (Alternately, navigate to **Main Menu** > **Customer Contracts** > **Schedule and Process Billing** > **Define Billing Plan**.)
15.	Update the following values: a) **Invoice Form** b) **Cycle ID**
16.	Contact Financials Support Services (fntrain@ucf.edu) to add the project to the **Control ChartField** page of the old ledgers and mark them as **Track without Budget**.
17.	Process the information with the old chartstring through completion. Bill, AR, and maintenance the project, as necessary.

Step	Action
18.	Contact Financials Support Services (fntrain@ucf.edu) to remove the project from the **Control ChartField** page.
19.	Close the **Project** and the **Contract**.

III. All Other Non-converted Projects

When a project has not been converted or is a pre-expansion project and the non-converted project needs substantial changes or has been amended, a new project will need to be set up and the old project closed. Refer to the "System Navigation for Grants" manual, "Course 5. Process Non-converted Projects," section "VI. Manual Conversion of Contracts" for the actions to follow.

IV. Historical F&A

When facilities and administrative (F&A) costs have not been processed for new transactions on a project but F&A needs to be calculated for a recently converted project, follow these steps:

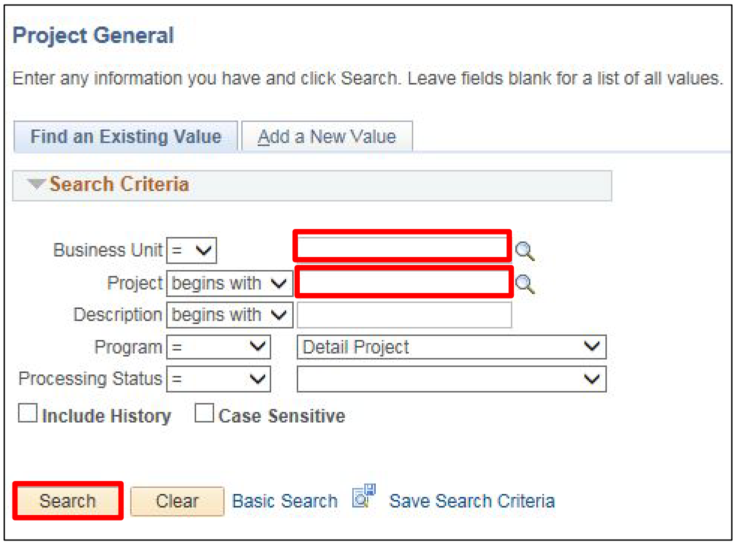
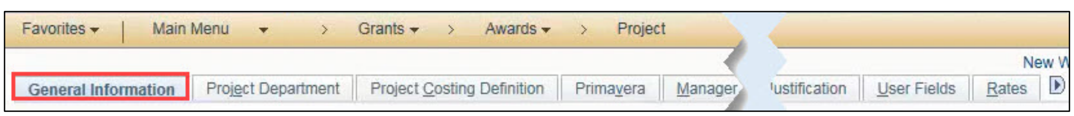
Step	Action
1.	Transactions are charged against the project.
2.	Ensure the F&A rates are set up properly. For guidance refer to the "System Navigation for Grants" manual, "Course 1. Establish Awards," section "III. Set Up Project & Activity."
3.	Refer to the "System Navigation for Grants" manual, "Course 4. Process Billing, Unit 1. Month End Prep," section "VI. Process & Monitor F&A."

V. Manual Conversion Construction Projects

When access has been granted, the new system is live, and the award cannot be closed, manually convert construction projects. Note that the award funding page for the project will not have the budget associated since it was entered on the Project Costing (PC) pages; however, the previous budget still exists in the system.

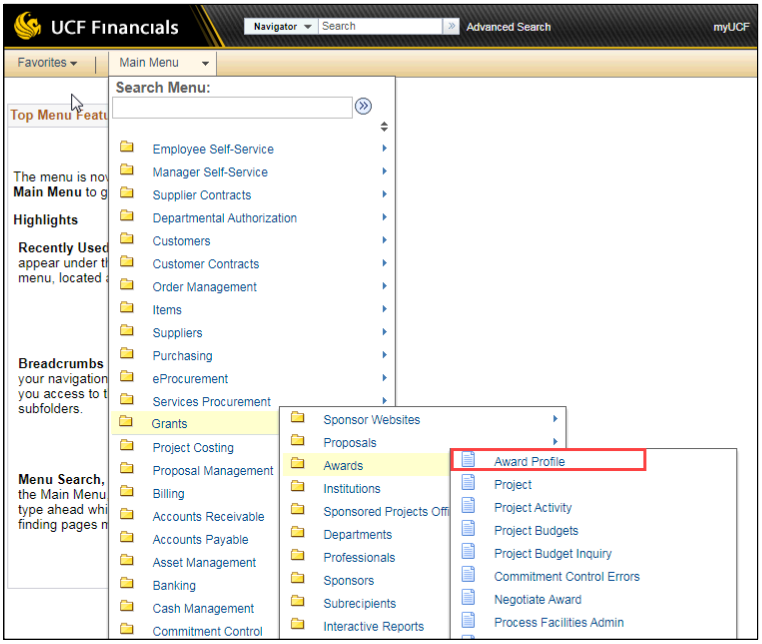
Note: Construction projects on an award could not be converted systematically during go-live. This necessitated that a manual conversion be completed to ensure the project was a part of the Grants profile. The budget of such a project looks incomplete in the Grants navigation. This is because the budget was initially set up in PC and was already in the appropriate ledgers. Grants navigation does not pull in these old lines, so the budget looks incomplete topically but can be viewed completely in the Budgets Overview. To manually convert construction projects, follow these steps:

Step	Action
1.	Navigate to **Main Menu** > **Grants** > **Awards** > **Project**. 

Step	Action
2.	Enter values in the following fields: a) **Business Unit** b) **Project (Project ID)** 
3.	Click **Search**. (See image in previous step.)
4.	Select the **Project Department** tab. 
5.	Enter values in the following fields: a) **Institution** b) **Subdivision*** c) **Department**** d) **Department**** e) **Percent Pledged** [**100.00**] ******Subdivision*** *will default if the* ***Department*** *is a budgetary department; otherwise, it should be the same* ***Department*** *value.* ***The* ***Department*** *and* ***Subdivision*** *under the* ***Proposal Projects*** *heading and the* ***Department*** *under* ***F&A Distribution*** *should be the same number.*

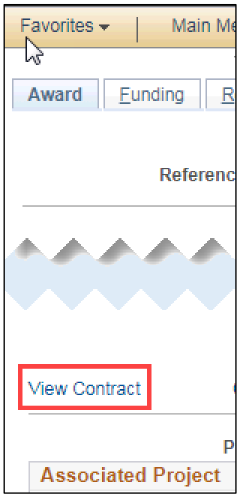
Step	Action
6.	Click **Save**.
7.	Select the **Project Costing Definition** tab.
8.	Enter the following: a) **FS_08 SetID** [**UCF01**] (This project will always be **UCF01** regardless of what **Business Unit** the project is in.) b) **System Source** [**PGM**] c) **Cost Budget** [**GBUD**] d) **Grants Project** [**Grants Object**] e) **Project Primary Flag** [**Check**]
9.	Check **Standard Activities**.
10.	Click **Save**.
11.	Select the **Location** tab.
12.	Enter the **Location code** [**811800501**].
13.	Click **Save**.
14.	Click the **Project Team** link.
15.	Change the project **Manager checkbox** to be checked on the **PI Line** by selecting the Team member who is currently associated as the Project Manager, unchecking the box, and checking the Team Member who is in the PI role.
16.	Click **Save**.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>17.</td><td>Navigate to Main Menu > Grants > Awards > Award Profile.



</td></tr>
<tr><td>18.</td><td>Click the Add New Value tab.</td></tr>
<tr><td>19.</td><td>Enter values in the following fields:
a) Business Unit
b) Award ID (existing Contract Number of the award)</td></tr>
<tr><td>20.</td><td>Click Add.</td></tr>
<tr><td>21.</td><td>Enter values in the following fields:
a) Reference Award Number (awarding agency’s number)
b) Federal Award Identification Number
c) Title
d) Long Description
e) Award PI
f) Purpose
g) Start Date
h) End Date</td></tr>
<tr><td>22.</td><td>Click on the Sponsor Website link.</td></tr>
</table>

Step	Action
23.	Enter the following: a) **Website Name** b) **URL Address**
24.	Add additional websites' numbers as required.
25.	Click **OK**.
26.	Click the **CFDA** link.
27.	Enter the following: a) **CFDA** b) Check the **Primary checkbox**
28.	Add additional **CFDA** numbers as required.
29.	Click the **Return to Award Proposal** link.
30.	Click the **Department Credit** link.
31.	Enter values in the following fields: a) **Department** b) **Credit %**
32.	Click **Save**.
33.	Select the **Funding** tab.
34.	Click **View All**.
35.	Enter values in the following fields: a) **Start Date** b) **End Date**
36.	Click **Save**.
37.	Select the **Award** tab.

Step	Action
38.	Click the **View Contract** link. 
39.	Select the **Lines** tab.
40.	Select the **Detail** tab.
41.	Click the link under **Billing Plan**.
42.	Update the following values: a) **Invoice Form** b) **Cycle ID** (associated with when the bill is due) c) **Bill by ID** [GM]
43.	Click **Save**.
44.	Select the **Internal Notes** link.
45.	Enter the following: a) **Classification** [**Custom**] b) **Note Type** [**DOM**] c) **Text** (the day of the month on which the invoice needs to be sent out, i.e., **5**, **10**, **15**, **20**, **25**, **30**)
46.	Click **Save**.

VI. Manual Conversion of Contracts

If any tractions fell out of conversion due to a data integrity issue, these contracts need to be manually converted into the Huron Research Suite (HRS) and UCF Financials. After creating an award in HRS, follow these steps:

Step	Action
1.	Create a new award in the HRS.
2.	Set up the appropriate contract type by following these system processes in the "System Navigation for Grants" manual, "Course 2. Set Up Contracts": • "I. Set Up & Activate a CRB Contract" • "II. Set Up & Activate an LOC Contract" • "III. Set Up & Activate a Fixed Price Contract" • "IV. Set Up & Activate a TM Contract" • "X. Set Up & Activate a NOBILL Contract"
3.	Ensure the **Billing Amount** is the full amount of the award.
4.	All expenses that were on the old project need to be transferred to the new project with a journal entry that has a credit to the old project and a debit to the new project. This is required for the new invoices to have cumulative balances calculated correctly. All other items need to be closed and a new item opened associated with the old project.
5.	To process the credit expenses on the old journal, refer to the "System Navigation for Grants" manual, "Course 5. Process Non-converted Projects," section "II. Non-converted Projects with Material Changes."
6.	Refer to the "System Navigation for Grants" manual, "Course 4. Process Billing" to bill the journal, which will zero out the old project and put it in the appropriate journal.

Step	Action
7.	To offset invoices, refer to "System Navigation for Grants" manual, "Course 4. Process Billing," "Unit 4. Related Billing Processes," section "V. Process an Offset." Also, refer to "Course 7. Research Foundation" in the following sections: • "III. Enter Deposit" • "IV. Apply Payment to Item" • "V. AR Direct Journal" • "VI. Generate Journals for AR Payments" • "XIV. Generate Journals for AR Direct Payments"