

Financials Integration Training

Quick Reference Guide

The HRS-PS Integration process is an extension of the UCF Rising program that facilitate a more seamless transition of information between the HRS system and UCF Financials. Additionally, it will eliminate double entry of data between the two systems.

What to Expect:

AWARD MODS

TERMS & CONDITIONS (T&C) ON EXISTING AWARDS

IF NOT ALLOWED T&C IS DESELECTED

Zero-dollar (\$0.00) budget rows will not be automatically sent on the modification message to already existing and finalized budgets.

IF RESTRICTION T&C IS SELECTED

Previously finalized budget rows will not be set to Control.

- Budget impact of controlling spending on a specified Budget Item applies only to any new project being added.
- Selecting a restriction T&C will allow for a non-zero-dollar budget row to integrate.

IF RESTRICTION T&C IS DESELECTED

- Budget control will not be removed from previously finalized budget rows.
- Control will need to be manually released or effective dated in UCF Financials.

IF NOT ALLOWED T&C IS SELECTED

Previously integrated zero-dollar (\$0.00) budget rows will not be reversed nor controlled.

- Control will need to be manually established in UCF Financials to prevent spending.
- The budget impact of preventing zero-dollar budget rows from integrating applies only to a new project being added.

IMPORTANT NOTE

A project's Start Date cannot be changed.

Actions will still need to be completed manually following PS-HRS integration. Financials users will still need to add the following manually:

- Setup the distribution for FIXED_AMOUNT contract lines
- Handle contract line splits
- Activate contracts
- Bill/revenue plan(s)
- Add billing milestones for FIXED_AMOUNT contract lines
- Insert Project Type field

Please Note: In the Award, these items are integrated:

- Reference Award Number
- Federal Award Identification Number (FAIN)
- Purpose
- Post Award Administrator
- Award Type



Award modifications will only be processed in UCF Financials for **ACTIVE** (Open) Awards and for Projects with an **Open** or **Reopened for Adjustment** status.

We now have an Award Profile Notepad. This is a place to record comments when manual changes are made to an award and contract. **Access this feature by: Navigate to the award > click the notepad link > add comments.**

Primary Project PI		
Associated Project		
PC Business Unit	Project	Description
UCF01	64016AD1	Modern Training Practices: Met

Go To: Sponsor Protocols Attributes Department Credit **Notepad** Award Modifications Supplemental Data

Run this query to find all the manual changes:
FXGM_AWARD_NOTEPAD.