

Awarding Business Process Documentation

[Customer Name]

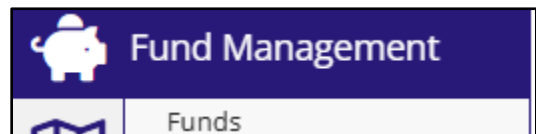
[Last updated]

Section 1: Fund Creation

A fund is the income source for an award, allowing reporting and tracking of awards obligated and liquidated.

Business Process Owner: [Name]

Important Note: Income Received must be greater than or equal amount awarding

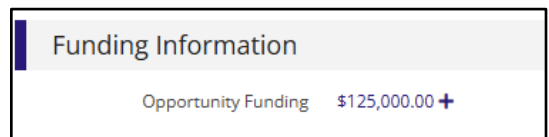


- Internal naming convention: [add here]
- Custom Fields required to be completed: [if applicable add here]

Section 2: Opportunity Funding Set-up (if awarding via Opportunity)

An opportunity allows organizations to receive applications and is linked to both the fund and resulting awards.

Business Process Owner: [Name]



- Funding Linked to Opportunity
 - Fund Management > Funds > Click on Applicable Fund Name > Fund Management > Opportunities > Click on Applicable Fund Opportunity

Important Note: Fund must be linked to opportunity prior to creating awards

Section 3: Workflow Set-up

A workflow is required to create awards from an application.

[Add details here about your application review workflow configuration and the awarding step]

Business Process Owner: [Name]

Section 4: Award Set-Up & Configuration

An award creates the basis for recipient reporting and interaction with the funder in Euna Grants.

Business Process Owner: [Name]

Step 1: Award Creation:

- Awards are Created by: **Workflow Action** by [Name]
- Award creation triggers a notification to the applicant that their application has been approved.

Award Funding:

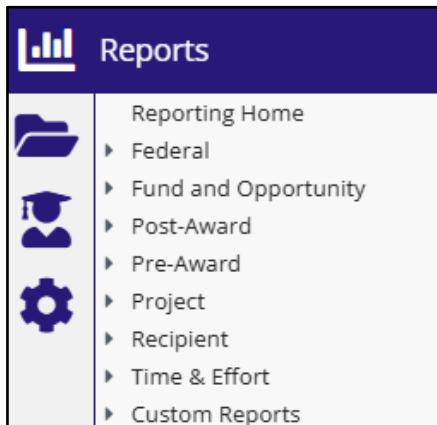
- Awards are Funded by: **Fund**
- Funding Source is: **[Multiple Funds or One Fund]**

The screenshot shows a web form titled "Create an Award". It includes several input fields: a search dropdown for "Recipient*", dropdown menus for "Funder Manager" and "Additional Users", text boxes for "Award Identification Number" and "Award Name", and date pickers for "Awarded Date*", "Start Date*", and "End Date*". A "Length of Award" field is set to "0 years 0 months 0 days". The form concludes with "Create" and "Cancel" buttons.

Step 2: Configure Award Details Page (Program Management>Awards):

- Configured by: [Name]
- Fields in use and internal name
 - [Example] Award Identification Number=
 - [Example] Payment Account Number=
- Custom Fields to complete: [Add here if applicable]

Step 3 (if applicable): Running Grant Agreement/Contract (Reports>Custom Reports>REPORT NAME)

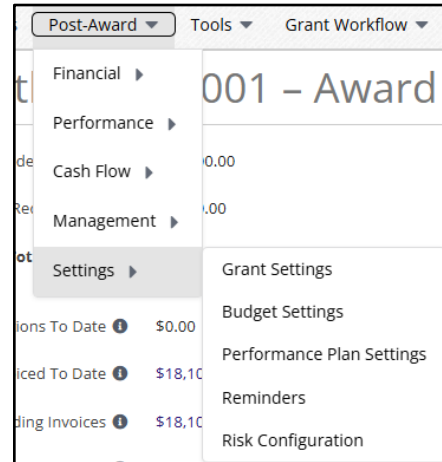


- Fields that must be completed for full agreement/contract to populate: [add here if applicable]

Step 4: Award Settings – Optional to Use (Award>Post Award>Settings>Grant Settings):

Award settings allow the ability for use of reporting periods and trigger tasks for recipients to receive reminders of reporting requirements.

- Configured by: [Name]
- Budget Reporting Period Cadence: **[Monthly, Quarterly, Bi-Annually, Annually]**
- Budget Reporting Period Due Date: **# Days**
- Performance Reporting Period Cadence: **Monthly, Quarterly, Bi-Annually, Annually]**
- Performance Reporting Period Due Date: **# Days**



Example:

Award Settings	
Budget Reporting Period	Monthly
Due Date For Budget Items	7 days after every monthly period
Performance Reporting Period	Monthly
Due Date For Performance Items	7 days after every monthly period
GL Actual Entry Method	Manual or Import
Add Expenses To Payment Requests By	Date Range And Reporting Periods
Allowable Amendment Types	Award Duration, Awarded Amount, Budget, Performance Goal
Financial Code	

Step 5: Budget Permissions (Award>Post Award>Settings>Budget Settings):

Budget permissions identify who has access to edit the budget and enter expenses.

- Configured by: [Name]

- Budget Creation Permissions: [**Recipient can View, Funder can Edit OR Recipient and Funder can edit OR Recipient can Edit Funder can View**]
- Expense Creation Permissions: [**Recipient can View, Funder can Edit OR Recipient and Funder can edit OR Recipient can Edit Funder can View**]

Recipient Settings	
Budget Creation Permissions	Recipient can view, Funder can edit
Expense Creation Permissions	Recipient and Funder can edit

Step 6: Performance Plan Permissions (Award>Post Award>Settings>Performance Plan Settings):

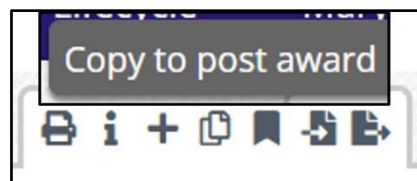
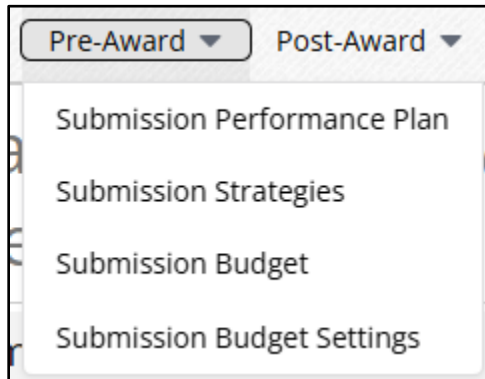
Performance plan permissions identify who has access to edit the plan and enter achievements.

- Configured by: [Name]
- Performance Plan Creation Permissions: [**Recipient can View, Funder can Edit OR Recipient and Funder can edit OR Recipient can Edit Funder can View**]
- Achievement Creation Permissions: [**Recipient can View, Funder can Edit OR Recipient and Funder can edit OR Recipient can Edit Funder can View**]

Recipient Settings	
Performance Plan Creation	
	Recipient can view, Funder can edit ▼
Achievement Creation	
	Recipient and Funder can edit ▼

Step 7: Budget Configuration (Award>Pre-Award>Submission Budget)

- Budget is created by: **Copying from Pre-Award by:** [Name]
- **Note:** Once copied a budget can be edited via Post-Award>Financial>Budget



Step 8: Performance Plan (Award>Pre-Award>Submission Performance Plan)

- Performance Plan is created by: **Copying from Pre-Award by** [Name]
- **Note:** Once copied a performance plan can be edited via Post-Award>Performance>Performance Plan

Step 9: Activate Award

- Completed by: [Name]
- Sends an email to the recipient to log-in to Euna Grants and begin managing their award