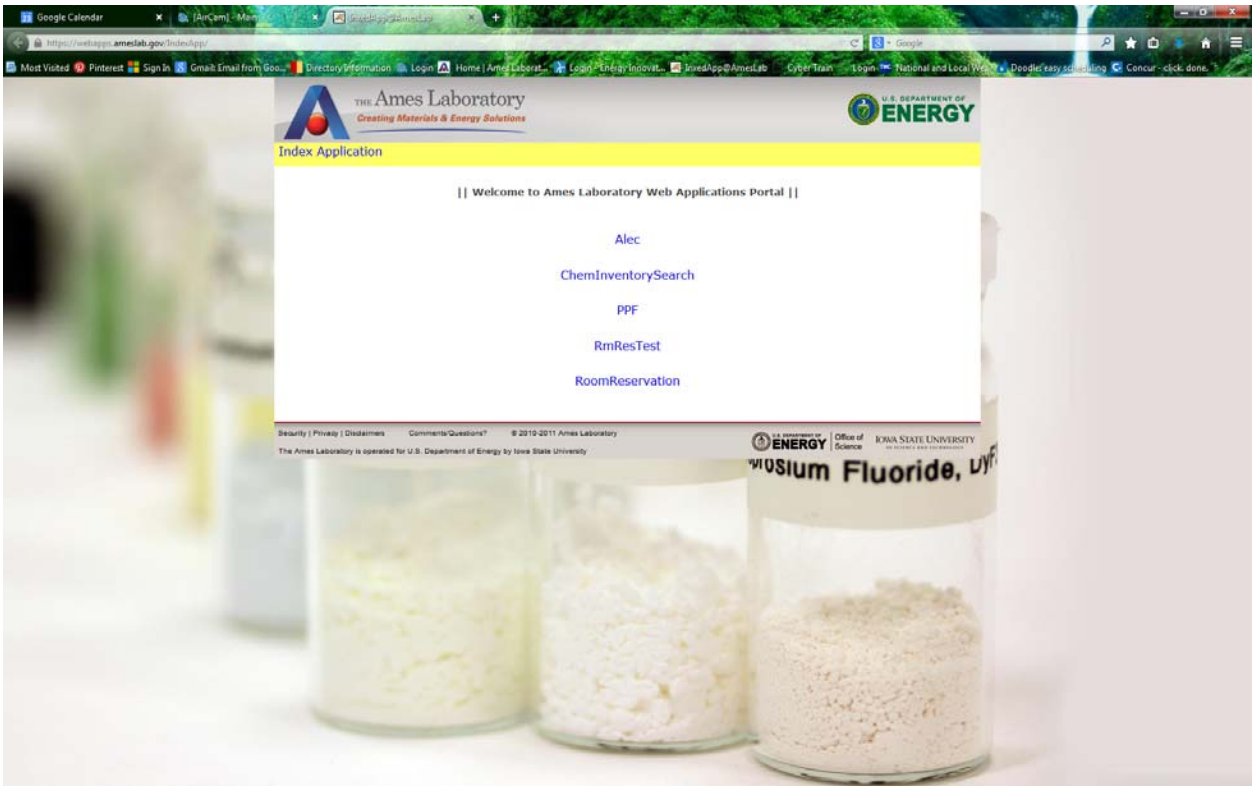
Budget Analysts

Budget- A New PPF #

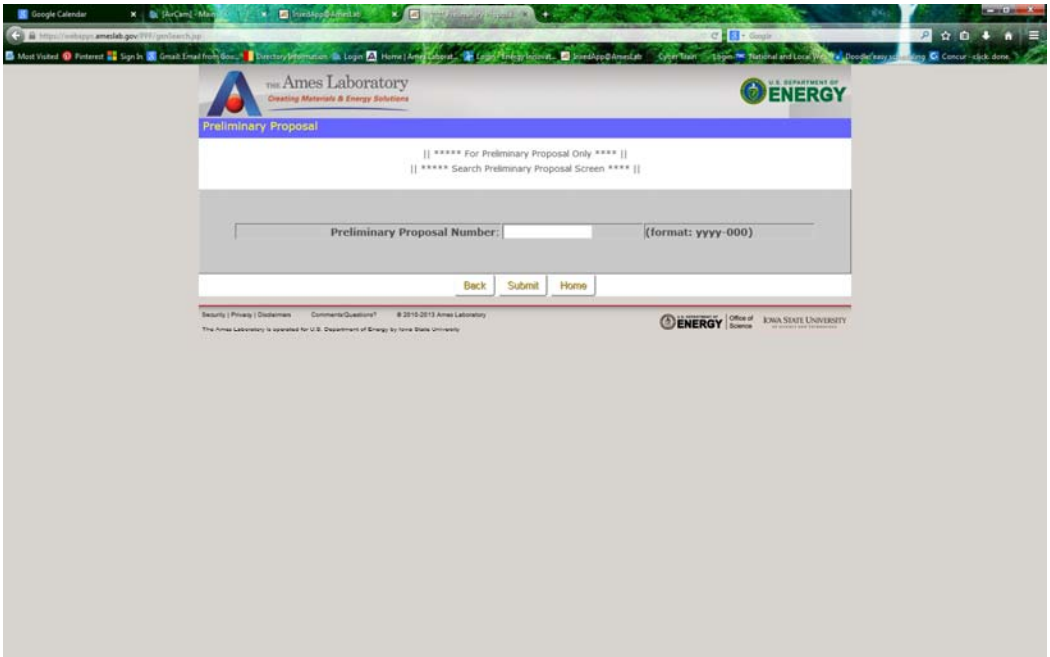
1. An e-mail is sent to oro@ameslab.gov, Deb Covey, and Ila Haugen stating "PP-20XX-XXX is a new PPF assigned by nameID on MM-DD-YYYY."
2. Log in to WebApps at: https://webapps.ameslab.gov/IndexApp/ . The system may require you to type in your login name and password twice for verification.
    a. Your User Name and Password are the same as your Ames Lab network User Name and Password.
3. Click on the PPF Link



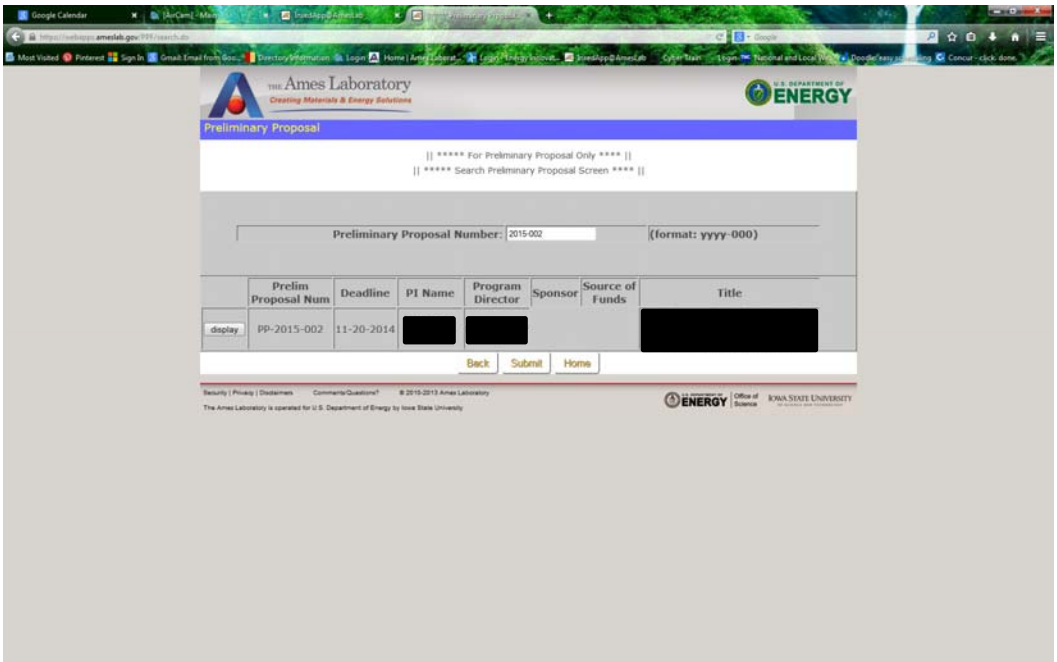
4. Budget has access to the following choices on the Main Menu
    - Edit Existing Proposal
    - PI Signatures
    - Look up Part 5: Budget and Personnel Requirements
    - Search Screen
    - To see who has signed a PPF

5. To find initial information on the PPF, click on the “Search Screen” option.

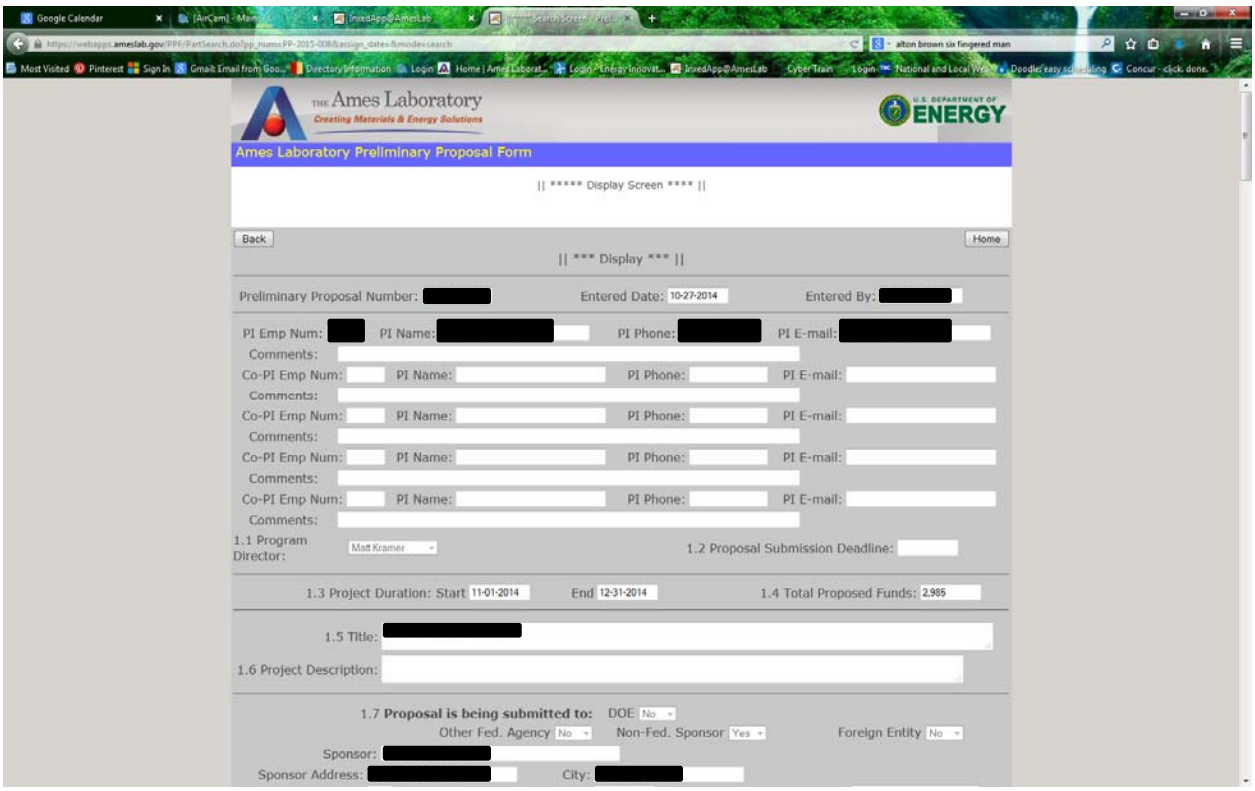
6. Enter the PPF Number as it appears in the e-mail.
    a. If you are unsure of the number, type in the year the PPF was assigned “20XX” to get those listed for the Fiscal Year they were entered. Click the Update button on the PPF you would like to work on.



7. Click the “Display” Button for the PPF you would like to see.



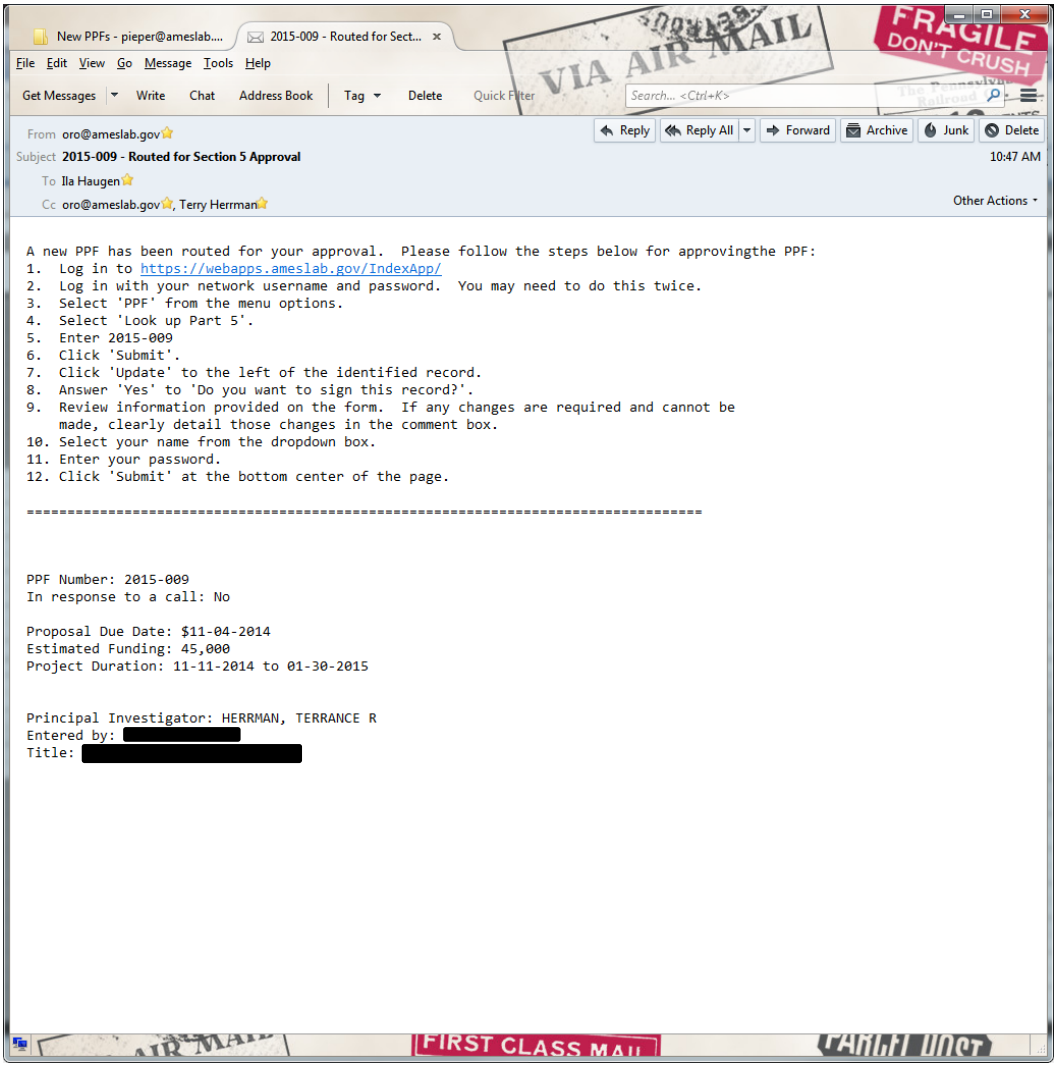
8. You will then be able to view the PPF number and any other information the "Entered By" may have saved as a draft.
    a. **The Statement of Work is not available in the e-PPF until the PI or program coordinator clicks "Route" on the PPF form. At that time, they are asked to upload their statement of work and any other supporting documents. Once uploaded, these files will be available for viewing on the Team-Mod Drive (T): PPFs/Statement of Work/. <u>If you need to look at the early draft of the SOW, you must get with the program coordinator or PI and ask for a copy.</u>**



9. Choose "Back" at the common of the screen to return to the search screen or "Home" to return to the Welcome screen.
10. Proceed with your current process in working with the Program to get the budget completed.
11. You will need to store the budget forms, however your Office internally stores and accesses these for upload into the electronic system when Part 5 is ready for Budget review and approval. The system will take, WORD, EXCEL, PDF files.

Look Up Part 5: Budget and Personnel Requirements

1. Once Parts 1-4 have been signed, an email will be sent to Ila Haugen, oro@ameslab.gov, and the PI stating it is being routed for "Section 5 Approval."



From oro@ameslab.gov
Subject **2015-009 - Routed for Section 5 Approval**
To Ila Haugen
Cc oro@ameslab.gov, Terry Herrman
10:47 AM

A new PPF has been routed for your approval. Please follow the steps below for approvingthe PPF:
1. Log in to https://webapps.ameslab.gov/IndexApp/
2. Log in with your network username and password. You may need to do this twice.
3. Select 'PPF' from the menu options.
4. Select 'Look up Part 5'.
5. Enter 2015-009
6. Click 'Submit'.
7. Click 'Update' to the left of the identified record.
8. Answer 'Yes' to 'Do you want to sign this record?'.
9. Review information provided on the form. If any changes are required and cannot be made, clearly detail those changes in the comment box.
10. Select your name from the dropdown box.
11. Enter your password.
12. Click 'Submit' at the bottom center of the page.

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PPF Number: 2015-009
In response to a call: No

Proposal Due Date: $11-04-2014
Estimated Funding: 45,000
Project Duration: 11-11-2014 to 01-30-2015

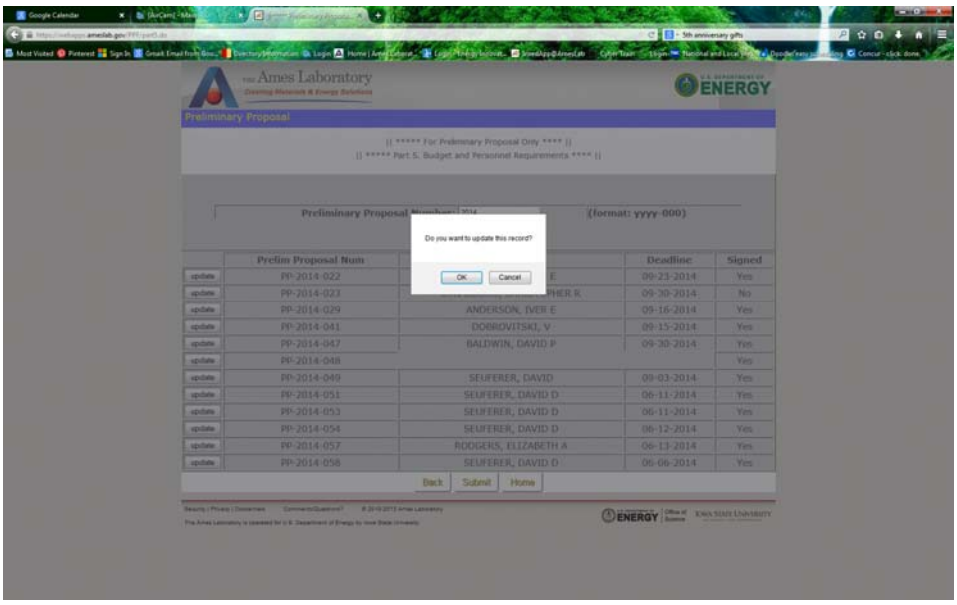
Principal Investigator: HERRMAN, TERRANCE R
Entered by: [redacted]
Title: [redacted]

2. Log into https://webapps.ameslab.gov/IndexApp/
3. Click on the "Look up Part 5: Budget and Personnel Requirements"

4. Enter the PPF Number as shown in the email.
    a. If you are unsure of the number, type in the year the PPF was assigned “20XX” to get those listed for the Fiscal Year they were entered. Click the Update button on the PPF you would like to work on.

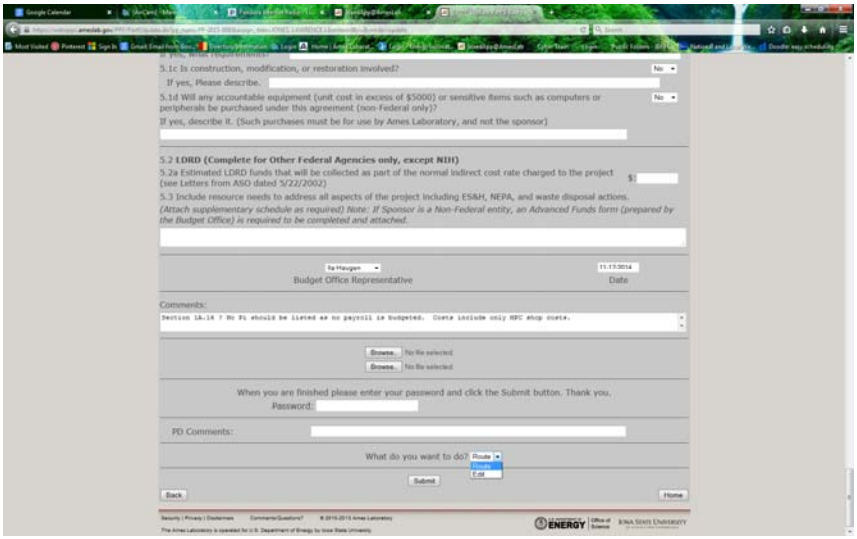
5. Click the “Update” Button for the PPF you would like to work with.

6. Confirm you would like to update the record by clicking “ok”



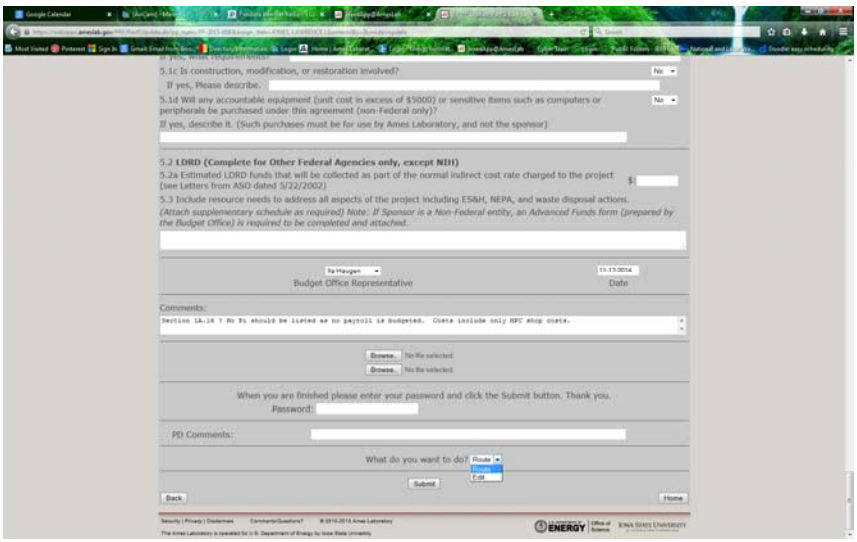
7. Review the PPF by scrolling through the information. The signatures of those who have already viewed the document will show their name, date, and any comments they might have made.
    a. The near final Statement of Work can be found on the TEAM-Mod (T:)/PPFs/Statement_of_Work. The PPF number is appended to the beginning of the document name.
    b. Any comments you might have, can be made in the “Comments” box. E.g. “Estimated funding should be changed from $340K to $350K,” or “item 1.6 should be marked yes.” These comments will be reviewed and changed on the PPF prior to final execution and routing of fully executed PPF.

8. Choose the “Browse” button to find the approved Attachment 1 Budget sheet and if applicable, the Attachment II (for Non-Federal sponsors, only) to be uploaded.

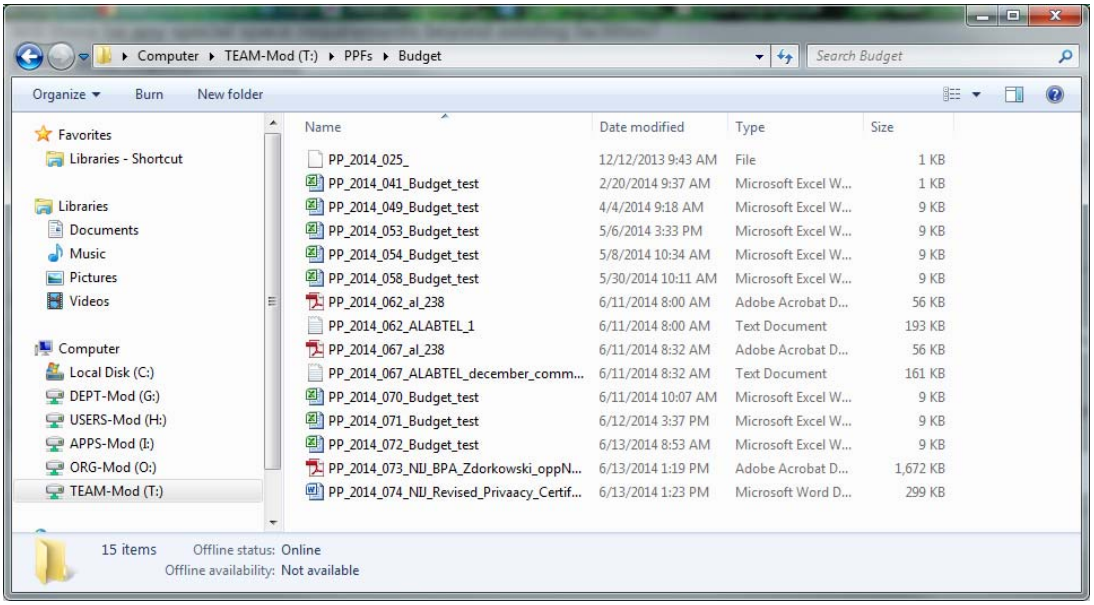


9. Choose the file on your computer you would like to attach and press “Open.” The file will be uploaded to the application. Repeat as needed.
10. If you are not an authorized signatory, enter the information necessary and answer the question “What do you want to do?” with the answer “Edit” and click to submit.

11. When you are ready to sign, choose your name, enter your password, answer the question “What do you want to do?” with the answer “Route” and click to submit.



12. The document(s) you have uploaded will be saved at TEAM-Mod (T:)/PPFs/Budget with the PPF number appending to the beginning of the file name.



13. Your signature will then be recorded and will be reflected in the “To see who has signed PPF” section.
14. An email will be sent to the Program Director, Associate Laboratory Director, and Deputy Director for review and approval.
15. A fully executed PPF will be sent to you, once all signatures are obtained. A copy of the PPF with attached can be found at TEAM-Mod (T:)/PPFs/FY20XX.