

## **Guidelines for AURA Cloning Process for Split-Budget Award Funding**

“Clones” of AURA forms need to be created for IBIS accounts for awards involving multiple departments (sister accounts). The primary, home department will establish the initial account, which can be cloned for the other departments. **AURA cloning should only be done for sister accounts.** Cloning an AURA for other reasons may result in information being transferred to the new IBIS account that is not applicable.

Anyone having AURA access to view forms has the ability to clone forms, make copies for additional departments needing the same award information to create a sister account.

### **For the purposes of this process description,**

- **Issuer** refers to a user copying (issuing) the AURA form to be cloned.
- **Receiver** refers to the user receiving the AURA form copy to be cloned.
- **Home Department** refers to the Department responsible for completing the first AURA form under split award circumstances.
- **Sister Department** refers to the Department receiving the copy of the Home Department’s AURA form to be cloned.

When an award is split between two or more budgets, AURA information can be shared with other departments acting upon the award without knowing their budgets. This method for duplicating AURA forms uses the **‘COP’ Form Action**.

If an AURA form needs to be created for another college or department for an Award, a copy of that form should be sent from the *Home Department* to a user within the *Sister Department*. The *receiver* of the form must have AURA access to create their AURA form clone from the copy.

This process for cloning is as follows:

1. Normally, the form should not be copied until it has processed (Document Status = ‘PRO’ or ‘UPD’). At this point all information has been made available by the Home Department, is approved, and verified correct.
2. With the *fully processed* AURA Form open, the issuer from the Home Department:
  - a. Enters **‘COP’** and the **USERID** of the person receiving the copy in the FORM ACTION and NEXT APPROVER fields.
  - b. Selects **PF12** to process. A message will indicate success.
  - c. Verifies a Copy was sent by checking the form’s history. This is done by entering **‘HIS’** in FORM ACTION and selecting **PF12**.
3. The *issuer* should always notify the receiver, by phone or email, that they were issued a copy of an AURA Form and supply the original AURA Form

with the DOCUMENT# to be searched. *Any documentation needed to set up the sister account should be provided to the Sister Department at this time.*

4. The receiver in the Sister Department:
  - a. Can locate the form by either of the following IBIS screen functions:
    - i. IGFM, (Get a Form), enter the document#
    - ii. 'BAFM' (Browse Forms Awaiting Action, or 'BFMC' (Browse Copied Forms) to search for awaiting forms.
      - Enters '**BAFM**' and identifies the form number to be cloned. It will have a 'COP' Action assigned to it.
      - Enters
        - '**BFMC**',
        - Earliest Date to Use(Start),
        - AURA (FormType)

From the list provided, the form number to be cloned can be provided. It should have a 'PRO' or 'UPD' Action assigned to it, if it was cloned after the home Department Form was completed.

- b. Selects the Form Number and changes the budget to one the college/department will use for the Award, leaving the correct fund number in place. .
- c. Enters '**ADD**' in the FORM ACTION and selects '**PF12**' to create a new AURA form (clone).
- d. At this time the AURA should be edited to include the Sister Department's budgetary and other information, such as the Assignment of Credit.
- e. If the primary account was created by a manual AURA, certain fields will be copied differently than those generated by the IAF interface process.
  - i. For example, the approval for protocol or export controls will be routed to IBIS compliance central desks even though they may have already been approved through the IAF.
  - ii. ARL, EOC or any area that has different AURA requirements, information will need to be edited. For example, the Indirect Cost Type would need to be changed, ARL Rate would need to be removed, and the Indirect Cost Code needs to be edited before the form can be added.

*Clones of AURA records created via IAF transfer have the same fields protected as the original cloned document, since they are also considered IAF documents.*

The above process should be repeated for each Department sharing Funds for the Award.