

Caltech

Oracle PTA Set Up Changes



Award Process

Division Steps

OSR Steps

3. Either Division or OSR: Add Award Document to PAM

1. Record Receipt of Award
2. Create Award Record

4. Notify Division of Award Document
5. Request Completion of Compliance and Personnel Info

6. Update Compliance and Personnel Information

7. Send Ancillary Review Request to the Office of Research Policy
8. Activate Award
9. Send PTA setup notification to GM

10. Complete PTA Set Up process

11. Activate PTA
12. Use the Send Email activity to issue the Award Summary to GM

PAM/OGM Integration Overview

New Awards:

- Only new awards created in PAM will be interfaced to Oracle PTA setup for Oracle award setup.
- Grant Managers should follow the new data entry procedure, although there is no change to the entry fields on the Award Setup form itself.

Award Modifications:

- If the award modifications lead to a new Oracle award set up, Grant Managers should use the 'Copy to' function in PTA Set Up.

New Award from PAM

- OSR will use the send email activity to notify the responsible Grant Managers after OSR starts the activation process.
- The email will include the PAM Award Number which will be used by the Grant Manager to start the PTA setup in Oracle.

Final Review

Next Steps

- Edit Award
- Printer Version
- COI Disclosure Status
- Terms And Conditions
- Activate**
- Withdraw
- Request Changes
- Request Designated Review
- Manage Ancillary Reviews
- Set Award Relationships
- Upload Award Documents
- Manage Deliverables
- Manage Relationships
- Manage Tags
- Create Agreement
- Send Email**
- Manage Access
- Assign Specialist
- Assign Award Approver

Award Setup Search

- In Oracle, navigate to *CIT – PTA Setup > Award Setup/Find*
- Copy the PAM award number in the email from OSR and paste it into the *Award Number* field
- Select *Search* and the award will be displayed in the Existing Award Setup List results
- **Note:** The first time a PAM Award Number is entered in the Award Setup Search form, it will not appear in the *Award Number* LOV. Simply paste the PAM Award Number and select *Search*

ORACLE CIT - PTA Setup

Home Star Settings 99+ | Logged In As ARULE

Award Setup Search

Enter a partial string to begin the search.

Setup Award From Scratch

Setup New Award

Setup Award From Proposal

Proposal Number

Proposal Title

Funding Source

Proposal PI

Status

Reset Search

Search Existing Award Setup

Award Setup Status

1 Award Number

Organization

Processing Area

Award Manager

Creation Date From To

Created By

Reset Search **2**

Award Setup Details Form

PAM Award information now appears in the Award Setup Details form (note: Terms and Conditions, etc. are also copied but not displayed here). Update/enter the two data fields below and then Save and Submit.

- **Award Number:** The Award Number that has been interfaced is the PAM Award Number. The Grant Manager should change this to the Oracle Award Number they intend to use.
- **Payroll Coordinator:** Enter the Payroll Coordinator for the Award

The screenshot shows the 'Award Setup Details' form. It contains various fields for setting up an award, including processing area, organization, funding source, award number, start/end dates, and administrative contact. Three orange circles with numbers 1, 2, and 3 are overlaid on the form to highlight specific fields: circle 1 points to the 'Award Number' field, circle 2 points to the 'Payroll Coordinator' field, and circle 3 points to the 'Submit' button at the bottom right.

Award Setup Details

* Indicates required field

Award Setup Details

* Processing Area	Sponsored Research	* Award Full Name	RTD - Dynamic crush testing of Additively Manufactured (AM)lat
* Organization	EAS Division Academic	* Award Short Name	Testing of AM Lattice Coup
* Funding Source Name	JET PROPULSION LABOR	Proposal Number	
Award Number Prefix	JPL	Proposal Title	[Proposal# FP00000074] Testing of AM Lattice Coupons
<input type="checkbox"/> New Funding Source		2 Payroll Coordinator	
Funding Source Award Number	1665160		Payroll Coordinator is only required for sponsored awards.
1 * Award Number	AWD00000048	* Administrative Contact	Rule, Andrea Estelle
<input type="checkbox"/> Pre-Award		Admin Phone	626-395-2009
* Start Date	01-Sep-2026	Admin Email	
* End Date	31-Aug-2031	Comments	Auto-created from Huron award.
* Award Manager	Ravichandran, Guruswami	Created By	ANONYMOUS
		Last Updated By	ANONYMOUS
		Last Update Date	12-May-2025
		Setup Status	Work in process

3

Save Submit Return Delete Copy To Print Cancel

Award Setup Details Form (cont.)

- The *Proposal Title* combines the PAM Funding Proposal Number and *Proposal Title*. For awards that are interfaced from PAM, the *Proposal Number* will be blank on the Award Setup Details form
- Note:** Do not enter data in the Proposal Number field

Award Setup Details
* Indicates required field

Award Setup Details

* Processing Area

Sponsored Research

* Organization

Chemical Engineering Adm

* Funding Source Name

NATIONAL SCIENCE FOU

Award Number Prefix

NSF

☐ New Funding Source

Funding Source Award Number

SPONAWDID.TEST

* Award Number

AWD00000028

☐ Pre-Award

* Start Date

01-Feb-2026

* End Date

31-Jan-2031

* Award Manager

Flagan, Richard C

* Award Full Name

Mechanisms and regulation of cotranslational protein targeting

* Award Short Name

Mechanisms and regulatio

Proposal Number

Proposal Title

[Proposal# FP000000008] Copy Test - Update TC, ReF

Payroll Coordinator

Rule, Andrea Estelle

Payroll Coordinator is only required for sponsored awards.

* Administrative Contact

Rule, Andrea Estelle

Admin Phone

626-395-2009

Admin Email

arule@caltech.edu

Comments

Created By

ANONYMOUS

Last Updated By

ARULE

Last Update Date

11-Sep-2025

Setup Status

Approved

Save

Submit

Return

Delete

Copy To

Print

Cancel

Award Modification leads to New Oracle PTA

- Find the Oracle award created from the first PAM award and then select *Copy To*
- Oracle uses the *Funding Source Award Number* to link the copied award to the original award so that the Terms and Conditions and References can be copied

Award Setup Details

* Indicates required field

Award Setup Details

* Processing Area	Sponsored Research	
* Organization	BBE Administration	
* Funding Source Name	NATIONAL INSTITUTES OF HEALTH	
Award Number Prefix	NIH	
	<input type="checkbox"/> New Funding Source	
Funding Source Award Number	123456-FG1	
* Award Number	NIH.AWD39	
	<input type="checkbox"/> Pre-Award	
* Start Date	01-Nov-2025	
* End Date	31-Oct-2027	
* Award Manager	Zernicka-Goetz, Magdalen	

* Award Full Name	Discerning the Mechanisms of Compaction and Apical Domain F
* Award Short Name	Discerning the Mechanisms of C
Proposal Number	
Proposal Title	[Proposal# FP00000026] SIT 1 Test Case 6 - Retest Fixes
Payroll Coordinator	Oracion, Karl
	Payroll Coordinator is only required for sponsored awards.
* Administrative Contact	Oracion, Karl
Admin Phone	626-395-3972
Admin Email	koracion@caltech.edu
Comments	
Created By	ANONYMOUS
Last Updated By	ARULE
Last Update Date	23-Sep-2025
Setup Status	Pending Finance Approval

Save Submit Return Delete Copy To Print Cancel

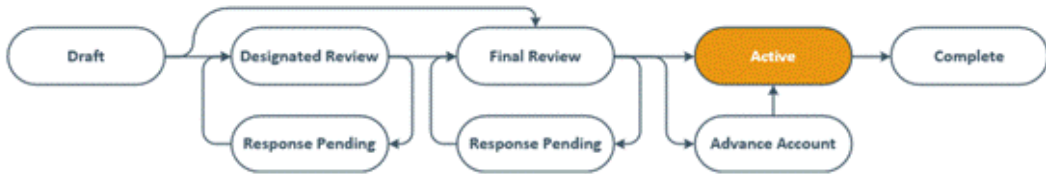
PAM View After Oracle PTA Set Up

After the PAM overnight process, the PTA information will come back to PAM.

IMSS Test		AWD00000035	Funding Award
PD/PI:	Barbara Wold	Award Date:	9/17/2025
Specialist:	Lisa Miller	Start Date:	9/18/2025
		End Date:	9/17/2026
Designated Reviewer:		Sponsor Award #:	888999
Award Approver:	David Mayo		
Approving Dept/Div/Institute:	BBE Administration		
Administrative Contact:	Karl Oracion		
Direct Sponsor:	HARVARD UNIVERSITY		
Prime Sponsor:	NATIONAL INSTITUTES OF HEALTH		
Current Total Project Period Commitment:	\$0		
Current Total Award Amount To Date:	\$0		

Awarded Funding Proposals:

ID	Name	Principal Investigator	Status
FP00000022	IMSS Test	Barbara Wold	Awarded



Modifications	Totals	Funding Allocations	Deliverables	Child Awards	Related Projects	Reviewers	Correspondence	Related PTAs	...
Related PTAs									
Project #	Task #	Award #	PTA Start	PTA End	PTA Status	Chargeable?			
TFC.12345	1	HARVARD.COPY	9/18/2025	9/17/2026	Active	no			
BJW.CELLINTERACTION	1	HARVARD.PAMTEST	9/18/2025	9/17/2026	Active	no			
BJW.CELLINTERACTION	APM	HARVARD.PAMTEST	9/18/2025	9/17/2026	Active	no			