Chapter	**2**	Quick Start: Issuing Grants to a New Company

The following instructions identify the tasks you must perform before issuing a grant in the TWP application. Perform all tasks in the order listed and complete all required fields (marked with a pink dot in the application) as you go.

Tips:

- Before you begin, familiarize yourself with the navigational features of the application. Review the Before You Begin chapter in the User Reference.
- For detailed instructions on completing each subfunction and a description of required fields, refer to the Help System or User Reference.

Perform these tasks—at a minimum—before you issue a grant in a new company.

1. Open the application:
   In the Address field of your Internet Explorer 5.5 (or higher) browser, type the TWP URL and press the **Enter** key.
   Example: https://toweb.yourcompany.transcentive.com

2. Type your User Name and Password and then click **OK** to display the Choose a Company page.

3. Select and set up the new company:
   Select a company from the list and click **Go**. The list contains only companies to which you have been granted access. To set up the company, select **Company > Company Profile**.

Note: To run financial reports, you must complete the Company > Fiscal Calendar Link page.

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4. Set up at least one of each of the following Company-related parameters:

- Transfer Agent: Select **Company > Agents**.

- Stock Class: Select **Company > Stock Classes**.

- Stock Plan: Select **Company > Plans** and add user-defined grant types when required.

- Grant Types: Select **Company > Grant Types** and assign exercise types.

> **Notes:**
> - You can use the Geographic Settings function to add a country, currency, and/or exchange rate information.
> - To create groups, use **Company > Participant Groups** and **Company > Grant Groups**.

5. Import or enter Price data:
   - To manually add price data for the company stock classes, select **Company > Prices**.
   - To upload price and other data into the application using an import file, you must submit a request (schedule the import). The system is typically set to import data once a day; however, an expedited import process may be available. For import start and end times, see Imports > View Queue by Company (or User).
   - To schedule an import, select **Imports > Schedule Import**.

> **Notes:**
> - At a minimum, you should enter prices for key transaction dates (Grant Date, Exercise Date, Sale Date).
> - You must enter all Price date points required for the FMV calculation method specified f.or your stock classes (specify High and Low price fields for Plans using the Average High Low FMV method, etc.).

6. Set up Schedules:
   Termination, Price, and Time Vesting / Exercisability Schedules are optional, and not required to issue grants; however, before you can

terminate an employee, you need to set up at least one termination schedule.

7. Set up Broker and Fee Schedules:
    Select **Company > Brokers** and the **Fee Schedules** link. You must create at least one of each.

8. Set up Tax types, Brackets, and Rates:
    Select **Taxes > Tax Rates**, click the **Brackets** link, and then click the **Tax Rates** link.

9. Add new participants:
    Select **Participant > Participant Maintenance**.

Note:	The Participant ID field is uneditable when Participant ID Equals Tax ID is selected in the Company Profile.

10. You can now select these tasks to perform:

    a. Create Blackouts: Select **Company > Blackout / Warning Periods**.
    b. Issue a Grant: Select **Issue Grants** subfunctions.
    c. Exercise a stock option: Select **Exercises** subfunctions.
    d. Sell stock: Select **Dispositions** subfunctions.
    e. Create valuations: Select **Valuations** subfunctions.
    f. Create reports: Select **Reporting** subfunctions.

    Tips:

    - Select fields in the order listed on the page.
    - Close and re-enter the company using the Choose a Company page when the system appears to be waiting or a list needs refreshing.
    - To put a transaction on hold, select **Suspense** or **Suspend Transaction**. Use the Fill subfunctions to process the transactions.
    - To process tax payments, use the following links: Participants > Participant Maintenance > Tax Allocations and Taxes and Fees.
    - To create forfeiture schedules before you create valuations, use the Valuations > Forfeiture Forecasts subfunction.