



PROPOSAL DEVELOPMENT- PRE AWARD
TRAINING MANUAL: PROPOSALS & BUDGETS

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(NJIT Grants Management Software)

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Background

- Streamlyne is an efficient and effective system to be utilized for faster grant application review and submission processing. The providing vendor is Vivantech, a software company based in San Diego, CA.

Objective

- The primary objective of the implementation of Streamlyne at NJIT is to alleviate the legacy paper processing related to Research Administration Proposal, Awards, and Compliance.

Benefit

- A major benefit of adopting Streamlyne is that the framework is designed to work with information about system users (roles and responsibilities) to support workflow. The desired approach for implementation is to keep current processes at NJIT 'where it makes sense'.

Modules

- ▶ Streamlyne is accommodating NJIT's grant proposal submission and award needs. The implementation is currently being conducted in phases according to the following functional modules:
 1. Pre Award – Creation and routing of proposals, including proposal budgets and submission to Grants.gov.
 2. Award- Maintenance of funded projects from award notification to closeout, including hierarchy, time & money and award budget.
 3. Negotiation- Tracking of communication relevant to other Streamlyne documents or stand-alone activities.
 4. Sub Award- Tracking of outgoing sub awards and generating sub award templates.
 5. Conflict Of Interest (COI)- Financial entities submission and maintenance, disclosure preparation and submission.
 6. Internal Review Board (IRB)- Committee Creation, Protocol Preparation and Submission, Protocol Review, Committee Meeting Management and Reporting.
 7. Institutional Animal Care & Use Committee (IACUC)- Committee Creation, Protocol Preparation and Submission, Protocol Review, Committee Meeting Management and Reporting.
 8. Streamlyne -Banner System Integration- Communication method between Streamlyne and Banner for future use of Account Creation and Budget Adjustment.

Current State

- The Streamlyne implementation is currently being conducted in stages by modules.
- The Pre Award module is currently being implemented in Streamlyne. Simultaneously, the Internal Review Board (IRB) compliance module is being implemented as well. This module includes Committee Creation, Protocol Preparation and Submission, Protocol Review, Committee Meeting Management and Reporting.

Future State

- ▶ The projected go-live of Streamlyne for NJIT is September, 2016. At the time of go-live, the legacy method of proposal/budget creation and submission will continue in parallel to the processing in Ekualiti until January, 2017.

Goals

- ▶ Resulting from these training manuals, the faculty members will be able to:
 - ▶ Create Proposals
 - ▶ Create Budgets
 - ▶ Submit Proposals & Budgets to Grants.gov

INITIAL LOG-IN

- The url to access Streamlyne is : <https://config-research.njit.streamlyne.org/>
 - The user logs into Streamlyne (Username is your UCID)
 - The user enters the following password: Fud1XMMuF4i5

STREAMLYNE

Welcome to Streamlyne. Please enter your username and password to login.

Username

Password

Login

- Once logged in, the user's Action List will be displayed. This is where he/she can locate and access any saved proposals in progress, FYI notifications and notifications to Approve or Acknowledge .

Action List

Refresh Filter

Apply Default
NONE

	Action	Id	Type	Title	Route Status	Delegator	Date Created	Group Request	Actions	Log
	COM	4005	Address Book	New Rolodex - add new record for big bear	SAVED		12:04 PM 10/15/2015			
Show	FYI	4321	KC Notification	251000 - Proposal 19 is submitted	FINAL		02:36 PM 11/10/2015		NO	
Show	COM	4419	Proposal Development Document	TJB 1-6-16; Proposal No: 202; PI: Alexander M. Haimovich; Sponsor: US NIH; Due Date: 01/15/2016	SAVED		10:17 AM 11/25/2015			
Show	FYI	4438	KC Notification	Testing Notifications	FINAL		12:44 PM 12/08/2015		NO	
	COM	4689	KC Institutional Proposal	KC Institutional Proposal - Test time MD	SAVED		12:03 PM 12/17/2015			
	COM	4691	KC Institutional Proposal	KC Institutional Proposal - MD test today 2b	SAVED		12:27 PM 12/17/2015			

PROPOSAL TAB

- The user can access existing documents on their action list by clicking the ID link- proposal will appear.

Rice Home KC Home Currently signed in as bozza

ekualiti KC Rice :: 1.26, KC :: 1.26

Main Menu System Admin Identity Maintenance

Action List Messages

Your Annual Disclosure is due.

Action List Refresh Filter

Apply Default
NONE

Show	COM 6583	Proposal Development Document	Test Proposal 7-12-; Proposal No: 552; PI: Alexander M. Haimovich; Sponsor: US NIH; Due Date: null	SAVED	10:23 AM 07/12/2016	
----------------------	-----------------	-------------------------------	--	-------	------------------------	--

Proposal * Indicates required field

- S2S
- Key Personnel
- Special Review
- Abstracts & Attachments
- Questions
- Budget Versions
- Permissions
- Proposal Summary
- Proposal Actions
- Medusa

Required Fields for Saving Document

Required Fields for Saving Document

Proposal Number : 552 * Sponsor Code : 31000253
US NIH

* Proposal Type :

* Lead Unit ID : 251000 - Electrical and Computer Engineering * Project Start Date : 07/01/2016

* Activity Type :

* Project Title :

Institutional Fields Conditionally Required

Award ID :

Original Institutional Proposal ID :

Sponsor & Program Information

Organization/Location

Delivery Info

[Save](#) [Reload](#) [Close](#)

- The user can also search for the proposal document by clicking the search icon.



- The user will search for the document by Document ID, followed by clicking 'Search'.

Document Search

Advanced Search Superuser Search Clear Searches Searches

Document Type:  

Initiator:  

Document Id:  

Date Created From: 

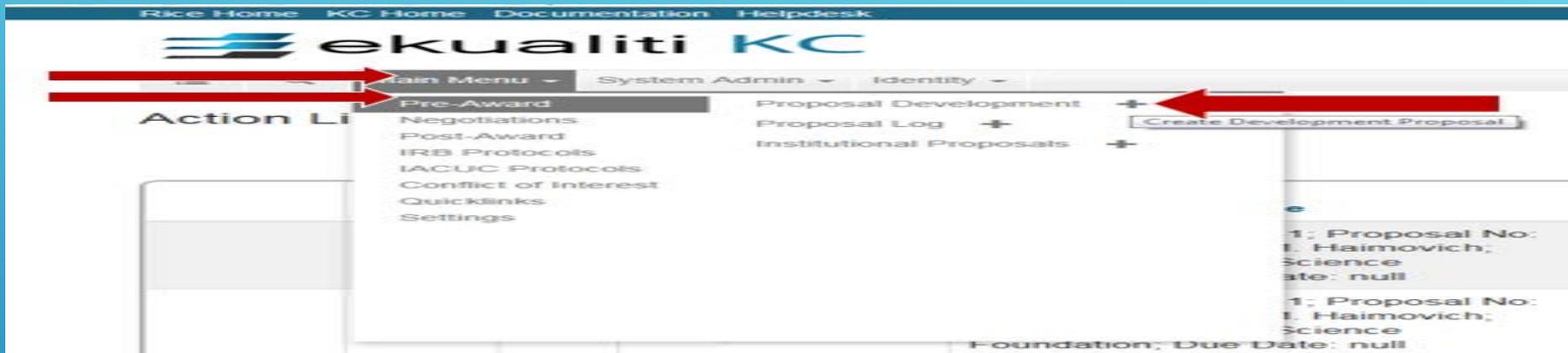
Date Created To: 

Name this search (optional):

- The user can select the proposal document by clicking ID link- proposal will appear.

Document Id	Document Type	Title	Status	Initiator	Date Created	Route Log
4036	Proposal Development Document	TJB Proposal 10-15-; Proposal No: 103; PI: Alexander M. Haimovich; Spo...	ENROUTE	Bozza, Thomas J.	10/23/2015 12:23 PM	

- In order to create a new proposal, the user will click on main menu, followed by Pre Award and the plus sign next to Proposal Development.
- Note: If the user clicks on Proposal Development itself, it would bring up the document lookup screen, as if you were searching for a particular proposal document.



- The user enters the required fields for the proposal (see next slide for dropdown listings).

The screenshot displays the 'Proposal' form in the application. The left sidebar shows a navigation menu with 'Proposal' selected. The main content area is titled 'Required Fields for Saving Document' and contains several input fields, each marked with an asterisk to indicate it is required. The fields are: 'Proposal Number', 'Proposal Type' (a dropdown menu), 'Lead Unit ID' (a dropdown menu), 'Activity Type' (a dropdown menu), 'Project Title' (a text input field), 'Sponsor Code', 'Project Start Date', and 'Project End Date'. Red arrows point to each of these fields. A legend in the top right corner states '* Indicates required field'. The number '9' is visible in the bottom right corner of the slide.

➤ The user selects the Proposal Type from the dropdown menu.

Required Fields for Saving Document

Required Fields for Saving Document

Proposal Number:

* Proposal Type:
Continuation
New
Renewal
Resubmission
Revision
Task Order

* Lead Unit ID:

* Activity Type:

➤ The user selects the Lead Unit ID from the dropdown menu.

Required Fields

Required Fields

Proposal Number:

* Proposal Type:

* Lead Unit ID:
000001 - University
105000 - Null Administration
210000 - Computer Science
210010 - Computational Biology
210200 - EC - MS Computer Science
211000 - Information Systems
212000 - Information Technology
213000 - Office of the Dean - CCS
240000 - Vice Provost for Research
250000 - Civil & Environmental Engineering
251000 - Electrical and Computer Engineering
251200 - EC - MS Electrical Engineering
252000 - Chemical, Biological and Pharm Engr
252020 - Particle Technology Center
253000 - Mechanical and Industrial Engr
254000 - Mechanical Engineering
254100 - Industrial Engineering
255000 - Bio-Medical Engineering
256000 - Engineering Technology
259000 - Office of the Dean - NCE
261000 - Chemistry and Environmental Science
262000 - Mathematical Sciences
262010 - Federated Biological Science
262020 - Center For Applied Mathematics
263000 - Physics
263010 - Materials Science and Engr Program
264000 - Biological Sciences
265000 - Humanities
266000 - Federated History

* Project Title:

Institutional Field

Lead ID:

Lead ID:

➤ The user selects the Activity Type from the dropdown menu.

* Activity Type:
Construction
Fellowship - Post-Doctoral
Fellowship - Pre-Doctoral
Instruction
Public Service
Research
Student Services
other

* Project Title:

Institutional Field

➤ The user enters the Sponsor Code for the Proposal.



Required Fields for Saving Document

Required Fields for Saving Document

Proposal Number: _____

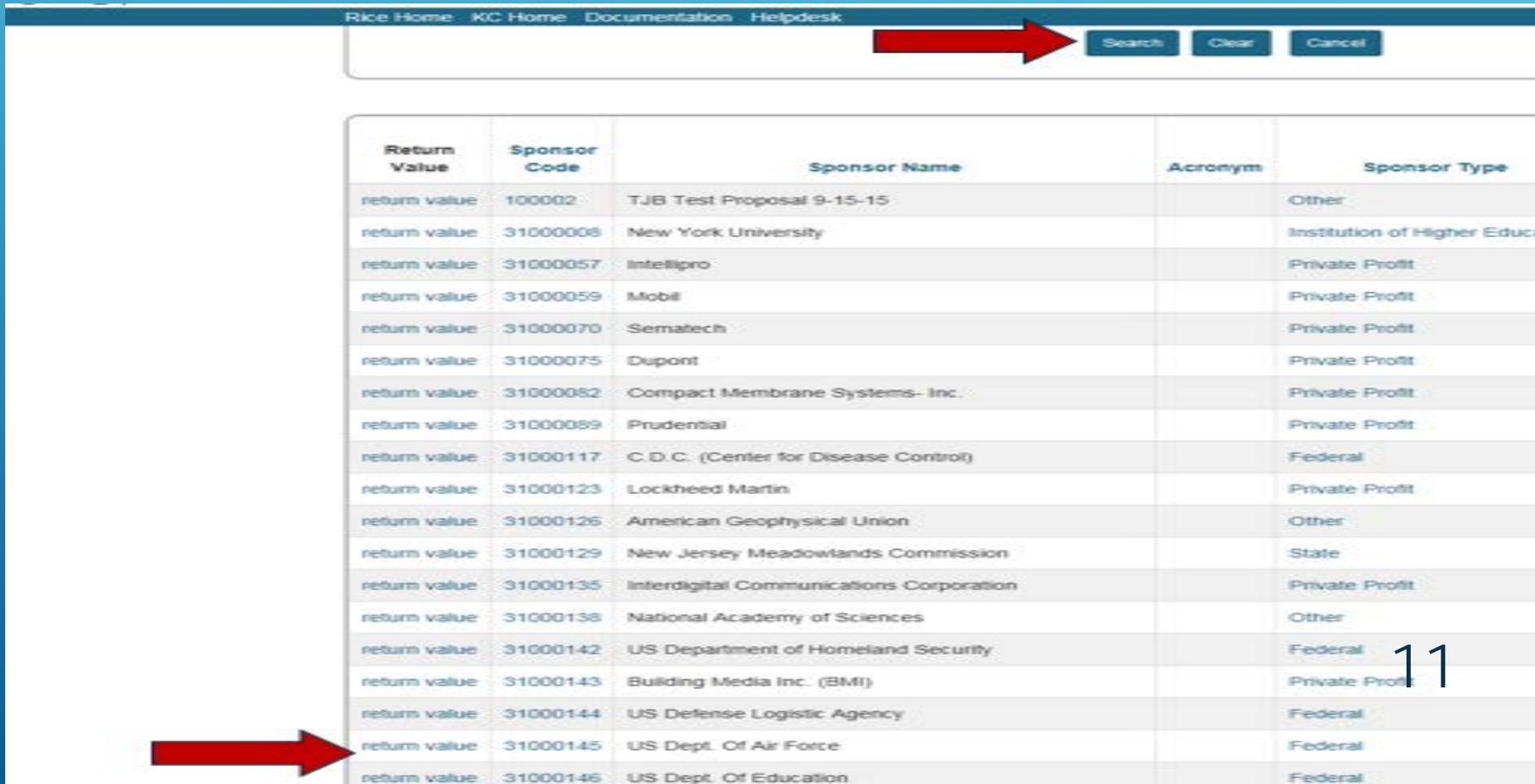
Proposal Time:

Sponsor Code:

Project Start Date:

➤ If the user does not know the sponsor code off-hand, s/he can lookup the sponsor code.

➤ The user will search for/ select the sponsor by clicking 'Search'.



Rice Home KC Home Documentation Helpdesk

Return Value	Sponsor Code	Sponsor Name	Acronym	Sponsor Type
return value	100002	TJB Test Proposal 9-15-15		Other
return value	31000008	New York University		Institution of Higher Educa
return value	31000057	Intellipro		Private Profit
return value	31000059	Mobil		Private Profit
return value	31000070	Sematech		Private Profit
return value	31000075	Dupont		Private Profit
return value	31000082	Compact Membrane Systems- Inc.		Private Profit
return value	31000089	Prudential		Private Profit
return value	31000117	C.D.C. (Center for Disease Control)		Federal
return value	31000123	Lockheed Martin		Private Profit
return value	31000126	American Geophysical Union		Other
return value	31000129	New Jersey Meadowlands Commission		State
return value	31000135	Interdigital Communications Corporation		Private Profit
return value	31000138	National Academy of Sciences		Other
return value	31000142	US Department of Homeland Security		Federal
return value	31000143	Building Media Inc. (BMI)		Private Profit
return value	31000144	US Defense Logistic Agency		Federal
return value	31000145	US Dept. Of Air Force		Federal
return value	31000146	US Dept. Of Education		Federal

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➤ To narrow a sponsor search, the user can enter the acronym of the sponsor.

Sponsor Lookup

Sponsor Code:

Acronym:

DUN And Bradstreet Number:

DODAC Number:

Postal Code:

Country Code:

Owned By Unit:

Active: Yes No Both

➤ The user can also use wild cards (i.e. %, * and the like) to narrow a search as well.

Sponsor Name:

Sponsor Type Code:

DUNS Plus Four Number:

CAGE Number:

State:

Audit Report Sent For FY:

Address Book Id:

Active: Yes No Both

➤ If the proposal being created is to be submitted to grants.gov, the S2S (System To System) tab will become enabled. Otherwise, this will be grayed out.

Proposal

S2S

Key Personnel

Special Review

Abstracts and Attachments

Questions

* Indicates required field

Required Fields for Saving Document

Required Fields for Saving Document

Proposal Number: 136

* Sponsor Code: 31000253
US NIH

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S2S TAB

➤ There will be 4 subpanels on the S2S tab: opportunity, submission details, forms and user attached forms.

The screenshot shows the S2S tab interface. At the top, there is a dark blue header with a white downward arrow and the text 'S2S'. Below this is a light gray bar containing 'Opportunity Search www.grants.gov' on the left and 'Grants.gov Forms Directory' on the right. In the center of the main white area, there is a search bar labeled 'S2S Lookup' with a magnifying glass icon and a blue button labeled 'Remove Opportunity' below it. On the left side, there is a vertical list of four items, each with a blue 'Show' button and a text label: 'Opportunity', 'Submission Details', 'Forms', and 'User Attached Forms'.

OPPORTUNITY subpanel

➤ The user will click the S2S Lookup icon to search for the Opportunity ID.

This screenshot shows the 'Opportunity' subpanel expanded. The top navigation bar is identical to the previous screenshot. The 'Opportunity' subpanel is now visible, featuring a 'Hide' button on the left and a 'Show' button on the right. The subpanel contains several fields: 'Opportunity ID:', 'Opportunity Title:' with a green circular icon, 'Submission Type:' with a dropdown menu showing 'Application', 'S2S Revision Type:' with a dropdown menu showing 'select', 'CFDA Number:', 'Competition Id:', 'Opening Date:', 'Closing Date:', 'Instruction Page:', 'Schema URL:', and 'S2S Provider:'. Two red arrows are present: one points to the 'S2S Lookup' search icon in the top bar, and another points to the 'Hide' button on the left side of the subpanel.

➤ The user enters the ID in the Opportunity ID field, clicks Search and the listing will be displayed. The user will click return value.

Opportunity Lookup

S2S Provider: Grants.Gov Opportunity ID: PA-C-R01

CFDA Number:

Return Value	CFDA Number	Closing Date	Competition Id	Instruction Page	Opening Date	Opportunity ID
return value		06/25/2018 12:00 AM	FORMS-C	https://trainingapply.grants.gov/apply/opportunities/instructions/oppP...	06/25/2013 12:00 AM	PA-C-R01

One item found.

Export options: CSV | spreadsheet | XML

➤ The opportunity details will be populated.

S2S

Opportunity Search www.grants.gov Grants.gov Forms Directory

S2S Lookup

Opportunity

Opportunity ID: PA-C-R01

Opportunity Title: G.g AT07 and NIH Ext-UAT FOA (R01)

Submission Type: Application

S2S Revision Type: select

CFDA Number:

Competition Id: FORMS-C

Opening Date: 06/25/2013 12:00 AM

Closing Date: 06/25/2018 12:00 AM

Instruction Page: <https://trainingapply.grants.gov/apply/opportunities/instructions/oppPA-C-R01-cidFORMS-C-instructions.pdf>

Schema URL: <http://trainingapply.grants.gov/apply/opportunities/schemas/applicant/oppPA-C-R01-cidFORMS-C.xsd>

S2S Provider: Grants.Gov

- If the user doesn't know the opportunity number off-hand, he/she will click on the link www.training.grants.gov to locate the opportunity ID. The user can then search for this opportunity ID they are interested in.

The screenshot shows the Grants.gov website. At the top, there is a search bar with the text "SEARCH: Grant Opportunities" and a "GO" button. Below the search bar, there are navigation tabs: HOME, LEARN GRANTS, SEARCH GRANTS, APPLICANTS, GRANTORS, SYSTEM-TO-SYSTEM, FORMS, OUTREACH, and SUPPORT. The main content area is divided into two columns. The left column has a "Find Grants" section with a search button and a "Find Open Grant Opportunities" section with three sub-sections: "NEWEST OPPORTUNITIES", "BROWSE CATEGORIES", and "BROWSE ELIGIBILITIES". Below these is a table of opportunities. A red arrow points to the first opportunity in the table.

Funding Opportunity Number	Opportunity Title	Agency	View More >
RF1-621-16-00001	Tanzania Comprehensive Health Services Delivery Program (CHSD)	Tanzania USAID-Dar es Salaam	
CDC-RFA-PS10-17-SUPP16	Effective HIV Prevention and Enhanced HIV/AIDS Community Care through Tanzanian Interfaith Networks in the United Republic of Tanzania under the President's Emergency Plan for AIDS Relief (PEPFAR)	Centers for Disease Control and Prevention	
CDC-RFA-PS09-973SUPP16	Promoting HIV Prevention Youth through a National HIV Hotline and Behavior Change Communication in the United Republic of Tanzania under the President's Emergency Plan for AIDS Relief (PEPFAR)	Centers for Disease Control and Prevention	
F16AS00009	GBLCC Notice of Intent to Make a Single Source Award	Fish and Wildlife Service	
ED-GRANTS-101515-002	OSERS-OSEP: Preparation in Special Education, Early Intervention, and Related Services: Focus Area B Preparing Personnel to Serve	Department of Education	

The right column is titled "Grants.gov Updates" and contains several news items with icons, including "Grants.gov Calendar", "Grants.gov Release 15.0 Production Deployment: October 17-19, 2015", "Grants.gov Notices - Updated September 8, 2015", "Grants.gov Releases", "Grants.gov Blog", "DATA Act Section 5 Pilot Program Presentation", "Financial Assistance", and "Suspect Fraudulent Activity?".

- The user can view the grants.gov instruction page, which will prompt a download of a PDF file.

The screenshot shows the Grants.gov instruction page for opportunity PA-C-R01. The page displays the following information:

- Opportunity ID: PA-C-R01
- Opportunity Title: G.g AT07 and NIH Ext-UAT FOA (R01)
- Submission Type: Application
- S2S Revision Type: select
- CFDA Number:
- Competition Id: FORMS-C
- Opening Date: 06/25/2013 12:00 AM
- Closing Date: 06/25/2018 12:00 AM
- Instruction Page: <https://trainingapply.grants.gov/apply/opportunities/instructions/oppPA-C-R01-cidFORMS-C-instructions.pdf>

A red arrow points from the "Instruction Page" link to a file download dialog box. The dialog box asks: "Do you want to open or save oppPA-C-R01-cidFORMS-C-instructions.pdf (20.7 KB) from trainingapply.grants.gov?". The dialog has buttons for "Open", "Save", "Cancel", and a close button (X).

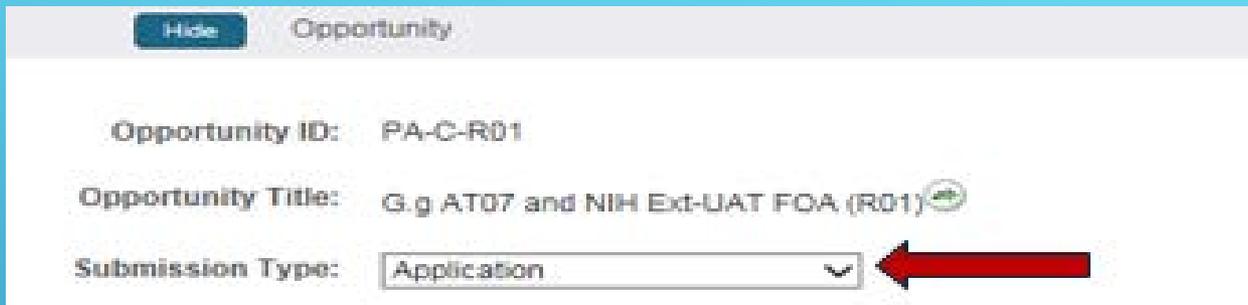
SF424 (R&R) General Application Instruction Links for FORMS-C Application Packages

The application guide and supplemental instructions for this Funding Opportunity Announcement (FOA) are located at the following links. Applicants are encouraged to return to these links for the most current revision of these instructions.

- [Part I: Instructions for Preparing and Submitting an Application](#)
- [Part II: Supplemental Instructions for Preparing the Protection of Human Subjects Section of the Research Plan & Part III: Policies, Assurances, Definitions, and Other Information](#)

It is critical that applicants follow the instructions in these documents except where instructed to do otherwise (in the FOA or in a notice from the [NIH Guide for Grants and Contracts](#)). When the program-specific instructions deviate from those in the above Application Guide documents, follow the program-specific instructions. Conformance to all requirements (both in the Application Guide and the FOA) is required and strictly enforced.

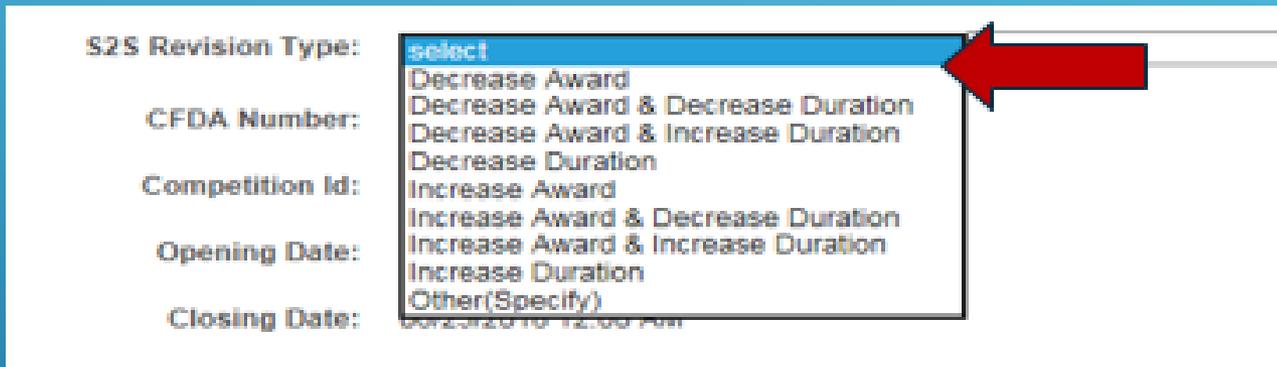
- The user will enter the submission type from the dropdown list.



A screenshot of a web form titled "Opportunity". At the top left, there is a "Hide" button. The form contains the following fields:

- Opportunity ID: PA-C-R01
- Opportunity Title: G.g AT07 and NIH Ext-UAT FOA (R01) 
- Submission Type: Application  

- If the Submission type selected is 'Revision, the user will also select the S2S Revision Type from the dropdown menu.



A screenshot of a web form showing the "S2S Revision Type" dropdown menu. The dropdown is open, displaying the following options:

- select
- Decrease Award
- Decrease Award & Decrease Duration
- Decrease Award & Increase Duration
- Decrease Duration
- Increase Award
- Increase Award & Decrease Duration
- Increase Award & Increase Duration
- Increase Duration
- Other(Specify)

Other fields visible on the form include:

- CFDA Number:
- Competition Id:
- Opening Date:
- Closing Date:



SUBMISSION DETAILS subpanel

- After the proposal is finally submitted to Grants.gov, all the details and statuses will appear in this subpanel.
- *Note: Since nothing has been submitted yet, we will revisit this subpanel later in this manual.*



A screenshot of a subpanel titled "Submission Details". At the top left, there is a "Hide" button. Below the title, the text reads:

Submission details will be available after the proposal is submitted.

FORMS subpanel

➤ This is where the user can view all the forms associated with the Opportunity. The user is able to select which forms to download and print.

Form Name	Mandatory	Include	Desc	Select to Print: (All Included None)
PHS398_CoverPageSupplement_2_0-V2.0	Yes	Yes	Available	<input type="checkbox"/>
PHS398_CumulativeInclusionReport	No	No	User Attached Form	<input type="checkbox"/>
RR_SF424_2_0-V2.0	Yes	Yes	Available	<input checked="" type="checkbox"/>
PerformanceSite_2_0	Yes	Yes	Available	<input type="checkbox"/>
RR_OtherProjectInfo_1_3-V1.3	Yes	Yes	Available	<input type="checkbox"/>
RR_KeyPersonExpanded_2_0	Yes	Yes	Available	<input type="checkbox"/>
RR_Budget_1_3	No	No	Available	<input type="checkbox"/>
RR_SubawardBudget30_1_3	No	No	Available	<input type="checkbox"/>
PHS398_ModularBudget_1_2-V1.2	No	No	Available	<input type="checkbox"/>
PHS398_ResearchPlan_2_0	Yes	Yes	Available	<input type="checkbox"/>
PlannedReport	No	No	Not Available	<input type="checkbox"/>

Print Selected

Do you want to open or save 3640PA-C-R01.pdf (34.8 KB) from config-kc.njit.ekualiti.com?

OMB Number: 4040-0001 Expiration Date: 06/30/2016	
APPLICATION FOR FEDERAL ASSISTANCE SF 424 (R&R)	
1.* TYPE OF SUBMISSION <input type="radio"/> Pre-application <input checked="" type="radio"/> Application <input type="radio"/> Changed/Corrected Application	3. DATE RECEIVED BY STATE State Application Identifier NJ
2. DATE SUBMITTED 2015-10-23	4.a. Federal Identifier b. Agency Routing Number c. Previous Grants.gov Tracking ID
5. APPLICANT INFORMATION * Organizational DUNS:075162990 * Legal Name: New Jersey Institute of Technology Department: Electrical and Computer Engin Division: University * Street1: NJIT Office of Sponsored Research Administration Street2: Suite 340, Fenster Hall, 323 Martin Luther King Blvd. * City: Newark County: * State: NJ: New Jersey Province: * Country: USA: UNITED STATES * ZIP / Postal Code: 07102-1982	
Person to be contacted on matters involving this application Prefix: * First Name: Middle Name: * Last Name: Suffix: Norma Y. Rubio Position/Title: Director Sponsored Program * Street1: University Heights Street2: * City: Newark County: * State: NJ: New Jersey Province: * ZIP / Postal Code: 07102-1982 * Phone Number: 973-596-6053 Fax Number: 973-596-6056 Email: norma.rubio@njit.edu	

USER ATTACHED FORMS subpanel

In the event that a form is not automatically populated, the user can go to this subpanel, enter in a description, search for the form and click add.

S2S
Opportunity Search www.grants.gov Grants.gov Forms Directory

S2S Lookup Remove Opportunity

Show Opportunity
Show Submission Details
Show Forms
Hide User Attached Forms

S2s User Attached Form

Add:	Description	Namespace	Form Name	Form File Name	Actions
<input type="text"/>	<input type="text"/>			<input type="text"/> Browse...	<input type="button" value="Add"/>

The user attached form will be listed as a line item, giving the user the option to print the form.

Form ID	Form Name	Form Version	Actions
/apply.grants.gov/forms/PHS398_CumulativeInclusionReport-V1.0	PHS398_CumulativeInclusionReport	PHS398_CumulativeInclusionReport-V3.0.pdf	View XML View PDF Delete

Cumulative Inclusion Enrollment Report

OMB Number: 0925-0002

This report format should NOT be used for collecting data from study participants.

Study Title: Grants.gov Application Form Title

Comments: This is the grants.gov application study.

Racial Categories	Ethnic Categories									Total
	Not Hispanic or Latino			Hispanic or Latino			Unknown/Not Reported Ethnicity			
	Female	Male	Unknown/Not Reported	Female	Male	Unknown/Not Reported	Female	Male	Unknown/Not Reported	
American Indian/Alaska Native	0	1	0	0	0	2	0	0	1	4
Asian	0	0	1	0	0	2	0	0	1	4
Native Hawaiian or Other Pacific Islander	1	0	0	0	0	1	0	0	1	3
Black or African American	0	0	0	0	0	2	0	0	1	3
White	5	10	0	0	0	1	0	0	1	17
More than One Race	0	0	1	0	0	2	0	0	1	4
Unknown or Not Reported	0	0	1	0	0	1	0	0	1	3
Total	6	11	3	0	0	11	0	0	7	38

< Previous Study Study 1 of 2 Next Study >

<< First Study Delete Study Last Study >>

To ensure proper performance, please save frequently.

➤ PROPOSAL TAB

- The user continues to populate the required fields on the Proposal tab.

Note: Sponsor Deadline Date, NSF Science Code and Research Type are required. All other fields are optional.

▼ Sponsor & Program Information

Sponsor & Program Information ⓘ

Sponsor Deadline Date:	<input type="text"/>	Sponsor Deadline Time:	<input type="text"/>
Sponsor Deadline Type:	<input type="text" value="select"/>	Notice of Opportunity:	<input type="text" value="select"/>
Sponsor Name:	<input type="text"/>	CFDA Number:	<input type="text"/>
Prime Sponsor Code:	<input type="text"/>	Opportunity ID:	<input type="text"/>
NSF Science Code:	<input type="text" value="select"/>	Sponsor Proposal ID:	<input type="text"/>
Sponsor Div Code:	<input type="text"/>	Does this proposal include subaward(s)?:	<input type="checkbox"/>
Anticipated Award Type:	<input type="text" value="select"/>	Sponsor Program Code:	<input type="text"/>
Research Type:	<input type="text" value="select"/>	Prev Grants.Gov Tracking ID:	<input type="text"/>
Agency Routing Identifier:	<input type="text"/>	Opportunity Title:	<input type="text"/>

19

➤ The Performance Site will be listed. The user will click the 'add' button.

Organization/Location

Applicant Organization

New Jersey Institute of Technology

New Jersey Institute of Technology
University Heights, Newark, NJ 07102-1992

Congressional Districts

Performing Organization

New Jersey Institute of Technology

New Jersey Institute of Technology CL
University Heights, Newark, NJ 07102-1992

Performance Site Locations

Address

Borough of Seaside Heights

Borough of Seaside Heights CL

Actions

Add

Other Organizations

Address

(Select) CL

Actions

Add

➤ Each performance site will be listed as a line item.

Performance Site Locations

Address

(Select) CL

1

Borough of Seaside Heights

Borough of Seaside Heights CL

Congressional Districts

➤ Delivery Info section is optional. If there were specific mailing instructions for a proposal, this information would be entered here.

Delivery Info

Delivery Info

Mail By: select

Type: select

Mail Account ID:

Number of Copies:

Mailing Name & Address: (select)

Mail Description:

KEY PERSONNEL TAB

- The user will add all the necessary personnel (PI, Co-investigator, and Key Person) to the proposal.

Proposal Development Document ⓘ

Document Number: 3951
Initiator Network Id: bozza
Sponsor(S2S): US Dept of Defense/None

Document Status: In Progress
Creation Timestamp: 09:30 AM 10/13/2015
Principal Investigator:

Proposal

S2S

Key Personnel

Special Review

Add Key Person

*Person: Employee Search ⓘ Non-employee Search ⓘ Search

*Proposal Role: select ▼

- The user will search for and select this person.

KcPerson Lookup

KcPerson Id: ⓘ

First Name:

Email Address:

Active: Yes No Both

Campus Code: ⓘ

User Name:

Office Phone:

Home Unit: ⓘ

Return Value	KcPerson Id	Full Name	User Name	Email Address	Directory Department	Directory Title	Office Location	Office Phone	School	Active
return value	21368449	Alexander M. Haimovich	haimovic	alexander.m.haimovich@njit.edu	251000	Dist Professor		973-596-3534		<input type="checkbox"/>

➤ The user selects the proposal role for this person.

The screenshot shows the 'Add Key Person' form. The '*Person:' field contains 'Alexander M. Halmovich'. The '*Proposal Role:' dropdown menu is open, showing options: 'select', 'Co-Investigator', 'Key Person', and 'PI/Contact'. A red arrow points to the 'PI/Contact' option. Below the dropdown, a tooltip displays 'Proposal Person Role Id'. At the bottom of the form, there are 'Clear' and 'Add' buttons, with a red arrow pointing to the 'Add' button.

➤ Each person will be listed as a separate section.

➤ Note: The steps to add a PI will be the same for the Co-Investigator and Key Person.

The screenshot shows the 'Add Key Person' form in a larger context. The left sidebar contains a navigation menu with items: 'Proposal', 'S2S', 'Key Personnel', 'Special Review', 'Abstracts and Attachments', 'Questions', 'Budget Versions', 'Permissions', 'Proposal Summary', and 'Proposal Actions'. The 'Key Personnel' item is highlighted. The main form area shows the 'Add Key Person' form with the '*Person:' field containing search options and the '*Proposal Role:' dropdown. Below the form, there are 'Clear' and 'Add' buttons. A light blue banner displays the message: 'Principal Investigator is a required field prior to submission. Only one PI is allowed.' Below this, there are expand/collapse icons and a list of key personnel. The first entry is 'Alexander M. Halmovich' with the role 'Principal Investigator'. A red arrow points to this entry. A tooltip '* Indicates required field' is visible on the right. The number '23' is displayed in the bottom right corner.

➤ The key person role field needs to be populated only when the proposal role is Key Person (example: 'scientist').

Add Key Person

*Person: Mengchu Zhou *Proposal Role: Key Person *Key Person Role:

Clear Add

➤ The user can delete a person by checking off the corresponding box, followed by clicking the 'delete selected' button.

Add Key Person

*Person: Employee Search Non-employee Search *Proposal Role: select

Clear Add

Principal Investigator is a required field prior to submission. Only one PI is allowed.

* Indicates required field

<input checked="" type="checkbox"/>	➤ Mengchu Zhou	Principal Investigator
<input type="checkbox"/>	➤ Combined Credit Split	

Delete Selected Save Reload Close

Delete Selected

➤ The user can view all the details of each person by clicking 'Show' next to the 'Person Details' subpanel.

Investigators and check the Multiple PI box. Add other senior personnel as Key Persons.

Document was successfully saved. * Indicates required field

Alexander M. Haimovich PI/Contact

Alexander M. Haimovich

Hide Person Details

Proposal Person Role Id: PI/Contact

Full Name: Alexander M. Haimovich User Name: haimovic
First Name: Alexander Last Name: Haimovich
Middle Name: M.

Organization

Email Address: alexander.m.haimovich@njit.edu Office Phone: 973-596-3534
Primary Title: Dist Professor Directory Title: Dist Professor
Home Unit: 251000 Division: Newark College of Engineering
eRA Commons User Name: eracom x Fax: 973-596-6056
Pager: Mobile:
Office Location: Secondary Office Location: 973-596-3534
Address Line 1: University Heights City: Newark
Address Line 2: County:
Address Line 3: Country: United States
Postal Code: 07102-1982 State: US - NEW JERSEY
Percentage Effort: Faculty:

Education

Education Level: Year Graduated:
Major: Degree:
School:

➤ The 'Extended details' subpanel will show the additional details of each person.

Principal Investigator is a required field prior to submission. Only one PI is allowed.

Permissions

Proposal Summary

Proposal Actions

Medusa

Alexander M. Haimovich Principal Investigator

Alexander M. Haimovich

Show Person Details

Show Extended Details

Age by Fiscal Year: Race:

Education Level: Degree:

Major: KcPerson Id: 21368449

Is Handicapped: Handicap Type:

Veteran: Veteran Type:

Has Visa: Visa Code:

Visa Type: Visa Renewal Date:

Office Location: Secondary Office Location: 973-596-3534

School: Year Graduated:

Directory Department: 251000 Primary Title: Dist Professor

Directory Title: Dist Professor Is Vacation Accrual:

Is on Sabbatical: County:

Id Provided: Id Verified:

Version Number: Citizenship Type: PERMANENT RESIDENT OF US

Show Degrees

Show Unit Details

Show Person Certification Questions (Incomplete)

Combined Credit Split

- 'Degrees' subpanel is where the person's degrees, graduation year and school can be found.

Alexander M. Haimovich Principal Investigator

Alexander M. Haimovich

Show Person Details

Show Extended Details

Hide Degrees

* Degree Type	* Degree Description	* Graduation Year	School	Actions
Add: Doctor of Arts				Add

- The user has the option to add the degree details if desired.

Alexander M. Haimovich Principal Investigator

Alexander M. Haimovich

Show Person Details

Show Extended Details

Hide Degrees

* Degree Type	* Degree Description	* Graduation Year	School	Actions
Add: select				Add
1 Bachelor of Science	Health		West Virginia University	Add

- The 'Unit Details' subpanel will list the lead unit associated with each person.

Alexander M. Haimovich Principal Investigator

Alexander M. Haimovich

Show Person Details

Show Extended Details

Show Degrees

Hide Unit Details

	Unit Name	* Unit Number	Actions
Add:	(select) Q	<input type="text"/>	Add
1	Electrical and Computer Engineering	251000	

- The user has the option to add the until details if desired.

Alexander M. Haimovich Principal Investigator

Alexander M. Haimovich

Show Person Details

Show Extended Details

Show Degrees

Hide Unit Details

	Unit Name	* Unit Number	Actions
Add:	(select) Q	<input type="text"/>	Add
1	Electrical and Computer Engineering	251000	
2	Computer Science	210000	

- The 'Person Certification Questions' subpanel is where each person is required to answer a set of questions.
Note: It is important to click 'Save' button after answering the questions.

The screenshot displays a web interface for 'Person Certification Questions'. It contains three question cards. Each card has a question text, a 'More Information...' link on the right, and radio buttons for 'Yes' and 'No'. Red arrows point from the question text to the radio buttons. Below the questions is a 'Save' button. At the bottom of the interface, there is a dark blue bar with a right-pointing arrow and the text 'Combined Credit Split', and a row of four buttons: 'Delete Selected', 'Save', 'Reload', and 'Close'. A large red arrow points from the 'Save' button in the question cards down to the 'Save' button in the bottom bar.

- The 'More information' link is provided to accompany the questions.
- The user can click on this link to view any further explanation, policy or regulation pertaining to each question.

This is a close-up of a question card. The question text is 'Are you currently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from current transactions by any Federal Department or agency?'. To the right of the question is a 'Less Information...' link with a red arrow pointing to it. Below the question are three sections: 'Explanation:', 'Policy:', and 'Regulation:', each with a red arrow pointing to it.

- The user has the option to print the questionnaire- a PDF file will appear (see slide below).

Questions

Are you currently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from current transactions by any Federal Department or agency? [More Information...](#)

Yes No

Have you or will you lobby any Federal agency on behalf of this award? (Lobbying is defined as using Federal funds in an attempt to influence, - either in the executive or legislative branch,- a specific Federal award? The term Federal award includes grants, contracts, loans, loan guarantees, insurance and/or other assistance programs.) [More Information...](#)

Yes No

Do you agree and certify that you will abide by current University policies on cost sharing, financial conflict of interest, intellectual property, and the use of human subjects/vertebrate animals in research? [More Information...](#)

Yes No

Do you want to open or save QuestionnaireAnswer1003.pdf (6.91 KB) from config-kr.njit.ekualiti.com?

Questionnaire

Questionnaire Name:	version 2 Person Certification Questions		
Description:	Version 2_Person Certification Questions		
Module:	Proposal Development	Sub Module:	Proposal Person Certification
Proposal Number:	76	Principal Investigator:	Alexander M. Haimovich
Title:	proposal 10-13-15	Person Role:	Principal Investigator
Proposal Person:	Alexander M. Haimovich		

As a Principal Investigator/Co-Investigator/Key Person I certify that:

- No, I am not currently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from current transactions by any Federal Department or agency.
No
- No, I have not lobbied or will not lobby a Federal agency on behalf of this award.
No
- Yes, I agree and certify that I will abide by current University policies on cost sharing, financial conflict of interest, intellectual property, and the use of human subjects/vertebrate animals in research.
Yes
- Yes, I certify that the information contained on this form and within this application is true, accurate and complete and any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties.
Yes
- Yes, I certify that the proposal budget includes all the Cost Sharing, necessary equipment, installation, shipping, new space, renovation and/or facility modification costs.
Yes
- Yes, I accept responsibility for compliance with award terms and conditions and University policies and procedures; particularly for the technical conduct of the work, submission of technical reports, regulatory compliance, and financial management.
Yes
- Yes, I have significant financial interests.

- The user can also add a Non-NJIT Employee to the proposal if necessary.

Add Key Person

*Person:	Employee Search <input type="text"/>	<input type="button" value="Q"/>
	Non-employee Search <input type="text"/>	<input type="button" value="Q"/>



- The user will search for and select the Non-Employee.

Non-Organizational Address Book Lookup

Address Book Id:	<input type="text"/>	Sponsor Code:	<input type="text"/>	<input type="button" value="Q"/>	<input type="button" value="☰"/>		
Sponsor:	<input type="text"/>	<input type="button" value="Q"/>	<input type="button" value="☰"/>	Address Line 1:	<input type="text"/>		
Address Line 2:	<input type="text"/>	Address Line 3:	<input type="text"/>	Comments:	<input type="text"/>		
City:	<input type="text"/>	County:	<input type="text"/>	Delete Flag:	<input type="text"/>		
Country Code:	<input type="text" value="select"/>	<input type="button" value="v"/>	Fax Number:	<input type="text"/>	Last Name:	<input type="text" value="Sumner"/>	
State:	<input type="text"/>	<input type="button" value="v"/>	Organization:	<input type="text"/>	Phone Number:	<input type="text"/>	
Email Address:	<input type="text"/>	Prefix:	<input type="text"/>	Suffix:	<input type="text"/>		
First Name:	<input type="text"/>	Owned By Unit:	<input type="text"/>	<input type="button" value="Q"/>	<input type="button" value="☰"/>	Postal Code:	<input type="text"/>
Middle Name:	<input type="text"/>	Sponsor Address Flag:	<input type="text"/>	Title:	<input type="text"/>		
Search Buttons:	<input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/>						



Return Value	Address Book Id	Last Name	First Name	Middle Name	Title	Organization	Address Line 1	Address Line 2	Address Line 3	City	State	Country Code	Postal Code	County	A
return value	100039	Sumner	Gordon	M.	Front-man	The Police	405 Spier Ave			Allenhurst	NJ		07711		

One item found

Export options: CSV | spreadsheet | XML

➤ The user selects the proposal role for the non-employee.

Add Key Person

*Person:	Gordon M. Sumner	*Proposal Role:	Key Person	*Key Person Role:	Key Person
----------	------------------	-----------------	------------	-------------------	------------

Clear Add

➤ Since the Key Person is a non-NJIT employee, the user will receive an error message- to assign a unit number for the key person.

➤ The user will enter the already assigned unit number for the proposal in question. The unit name and unit number will be listed as a line item for the non-NJIT employee (see slide below).

Add Key Person

Errors found in this Section:
• At least one Unit is required for Gordon M. Sumner.

*Person:	Employee Search Non-employee Search	*Proposal Role:	select
----------	--	-----------------	--------

Clear Add

PI/Contact is a required Proposal Role prior to submission. Only one PI/Contact is allowed. For single PI submissions, please designate the lead investigator as PI/Contact & other senior personnel as Key Persons. For multiple PI submissions, please designate one PI/Contact. Add additional lead investigators as co-Investigators and check the Multiple PI box. Add other senior personnel as Key Persons.

1 error(s) found on page...

Alexander M. Haimovich PI/Contact

Gordon M. Sumner Key Person

Gordon M. Sumner

Show Person Details

Show Extended Details

Show Degrees

Hide Unit Details

Errors found in this Section:
• At least one Unit is required for Gordon M. Sumner.

	Unit Name	* Unit Number
Add:	(select)	251000

Add

	Unit Name	* Unit Number
Add:	(select)	
1	Electrical and Computer Engineering	251000

- The user can enter the percentages for Combined Credit Split among all key personnel.

The screenshot shows the 'Combined Credit Split' form for two investigators: Andrew J. Gerrard (PI/Contact) and Gregory David Fleishma (Co-Investigator). The form is divided into three columns: Responsibility, Space, and Financial. Each column has input fields for the investigator and their respective units. A red arrow points to the 'Combined Credit Split' header.

	Responsibility	Space	Financial
Andrew J. Gerrard	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
703000 - Center for Solar Research	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
263000 - Physics	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Unit Total:	0.00	0.00	0.00
Gregory David Fleishman	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
703000 - Center for Solar Research	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Unit Total:	0.00	0.00	0.00
Totals			
Investigator Total:	0.00	0.00	0.00

- The user will indicate the percentages for Responsibility, Space and Financial for each person. Once the figures are entered, the user clicks 'Recalculate'.

- Note: Both the investigator total and unit total must equal 100% for each column.

The screenshot shows the 'Combined Credit Split' form with values entered. Red arrows point to the input fields for Andrew J. Gerrard's Responsibility (50.00) and Space (50.00), and the Unit Total (100.00). Green arrows point to the input fields for Gregory David Fleishman's Responsibility (50.00) and Space (50.00), and the Unit Total (100.00). Blue arrows point to the input fields for Gregory David Fleishman's Responsibility (100.00) and Space (100.00), and the Unit Total (100.00). A red arrow points to the 'Recalculate' button.

	Responsibility	Space	Financial
Andrew J. Gerrard	<input type="text" value="50.00"/>	<input type="text" value="50.00"/>	<input type="text" value="50.00"/>
703000 - Center for Solar Research	<input type="text" value="50.00"/>	<input type="text" value="50.00"/>	<input type="text" value="50.00"/>
263000 - Physics	<input type="text" value="50.00"/>	<input type="text" value="50.00"/>	<input type="text" value="50.00"/>
Unit Total:	100.00	100.00	100.00
Gregory David Fleishman	<input type="text" value="50.00"/>	<input type="text" value="50.00"/>	<input type="text" value="50.00"/>
703000 - Center for Solar Research	<input type="text" value="100.00"/>	<input type="text" value="100.00"/>	<input type="text" value="100.00"/>
Unit Total:	100.00	100.00	100.00
Totals			
Investigator Total:	100.00	100.00	100.00

➤ ABSTRACTS & ATTACHMENTS TAB

➤ The user can upload all the related/necessary/required documents for proposals by selecting the attachment type, the status, uploading the file, entering comments and a description. Once added, each attachment will be listed as a line item.

The screenshot displays the 'Abstracts and Attachments' tab in a software interface. On the left sidebar, the 'Abstracts and Attachments' tab is highlighted with a red arrow. The main content area is titled 'Add Proposal Attachments' and contains several form fields and buttons. A red arrow points to the 'Attachment Type' dropdown menu. Another red arrow points to the 'File Name' field with a 'Browse...' button. A third red arrow points to the 'Status' dropdown menu. A fourth red arrow points to the 'Comments' text area. A fifth red arrow points to the 'Description' text area. A sixth red arrow points to the 'Add' button. Below the form, a table lists the added attachments. A red arrow points to the 'View' button for the first attachment. The table shows one attachment with the following details:

Attachment Type	Status	File Name	Contact Name	Email Address	Phone Number	Comments	Description
Other	Incomplete	Export ControlRev10715.docx				Proposal Attachment 10-14-15	Proposal Attachment 10-14-15

At the bottom of the table, there are buttons for 'View', 'Replace', 'Delete', 'View/Edit Rights', 'Cancel', and 'Save'.

➤ The user had the ability to view and edit the Rights for managing the attachments.

Abstracts and Attachments

Questions

Budget Versions

Permissions

Proposal Summary

Proposal Actions

Medusa

this proposal is being submitted via Grants.gov

Add Proposal Attachments

Mark all attachments:

* Attachment Type:

Status:

Uploaded By:

Posted Timestamp:

Comments:

* File Name:

Contact Name:

Email Address:

Phone Number:

Description:

1. Other - Incomplete

* Attachment Type: Other

* Status: Incomplete

Uploaded By: Bozza, Thomas J.

Posted Timestamp: 10/14/2015 03:04 PM

Comments: Proposal Attachment 10-14-15

* File Name: Export ControlRev10715.docx

Contact Name:

Email Address:

Phone Number:

* Description: Proposal Attachment 10-14-15

➤ Personnel Attachments (0)

Rights

Proposal Attachment Rights for 1. Other

Alexander M. Haimovich: Read Modify None

Norma Y. Rubio: Read Modify None

Thomas J. Bozza: Read Modify None

- During approval process (within the Proposal Actions tab), the user wishes to replace the existing proposal attachment.

▼ Proposal Attachments (3)

Mark all attachments:

1. Narrative - Complete

Attachment Type : Narrative File Name :  TJB Narrative.pdf

* Status : Complete Contact Name :

Uploaded By : Kam, Moshe Email Address :

Posted Timestamp : 02/25/2016 02:58 PM Phone Number :

Comments :  Description : 



- The user chooses the attachment to replace the existing proposal attachment.

▼ Proposal Attachments (3)

Mark all attachments:

1. Narrative - Complete

Attachment Type : Narrative File Name :

* Status : Contact Name :

Uploaded By : Kam, Moshe Email Address :

Posted Timestamp : 02/25/2016 02:58 PM Phone Number :

Comments :  Description : 



➤ The user is prompted to send an email notification to all past approvers of the proposal in question regarding the attachment replacement.

Notification Editor

Notification Recipients

Add:

Role Search

Employee Search

Non-Employee Search

1 KC-WKFLW:All Past Approvers

Notification Message

Subject

Message

- The user is able to delete the attachment.

Proposals Attachments (1)

Add Proposal Attachments

Mark all attachments:

* Attachment Type:

Status:

Uploaded By:

Posted Timestamp:

Comments:

* File Name:

Contact Name:

Email Address:

Phone Number:

Description:

1. Other - Incomplete

* Attachment Type: Other

* Status: Incomplete

Uploaded By: Bocza, Thomas J.

Posted Timestamp: 10/14/2015 03:14 PM

Comments:

* File Name: Export Control.docx

Contact Name:

Email Address:

Phone Number:

* Description:



Are you sure you would like to delete the following attachment: Proposal Attachment Export ControlRev10715.docx?



- Following the data validation process (in the proposal tab slides), the attachments are showing a status of 'incomplete'.
The user cannot proceed with proposal submission until the attachments are marked as 'complete'.
- Under 'Mark all attachments', the user will select 'Complete' and then clicks the 'Update' button.

The screenshot displays the 'Proposal Attachments (3)' interface. At the top, there is a section titled 'Add Proposal Attachments' with a dropdown menu for 'Mark all attachments' showing options: 'select', 'Complete', and 'Incomplete'. The 'Complete' option is selected, and the 'Update' button is highlighted with a red arrow. Below this, there are fields for 'Attachment Type', 'Status', 'Uploaded By', 'Posted Timestamp', 'Comments', 'File Name', 'Contact Name', 'Email Address', 'Phone Number', and 'Description'. Two attachment entries are listed:

- 1. PHS_ResearchPlan_ResearchStrategy - Incomplete
Validation Errors found in this Section:
- Proposal Attachment Status Codes must be set to "Complete".
Attachment Type: PHS_ResearchPlan_ResearchStrategy
Status: Incomplete (with a red arrow pointing to the status)
Uploaded By: Bozza, Thomas J.
Posted Timestamp: 05/20/2016 12:18 PM
File Name: TJB Research Plan-Strategy.pdf
- 2. Narrative - Incomplete
Validation Errors found in this Section:
- Proposal Attachment Status Codes must be set to "Complete".
Attachment Type: Narrative
Status: Incomplete (with a red arrow pointing to the status)
Uploaded By: Bozza, Thomas J.
Posted Timestamp: 05/20/2016 12:18 PM
File Name: TJB Narrative.pdf

- The attachments will now be marked as 'complete' and the user will be able to proceed with the proposal submission process.

The screenshot shows the same 'Proposal Attachments (3)' interface, but now the status of both attachments has been updated to 'Complete'. Red arrows point to the 'Complete' status in the attachment headers:

- 1. PHS_ResearchPlan_ResearchStrategy - Complete
Attachment Type: PHS_ResearchPlan_ResearchStrategy
Status: Complete
Uploaded By: Bozza, Thomas J.
Posted Timestamp: 05/20/2016 12:18 PM
File Name: TJB Research Plan-Strategy.pdf
- 2. Narrative - Complete
Attachment Type: Narrative
Status: Complete
Uploaded By: Bozza, Thomas J.
Posted Timestamp: 05/20/2016 12:18 PM
File Name: TJB Narrative.pdf

> The user can also add personnel attachments (same steps as for the proposal attachments)

Personnel Attachments (1)

Add Personnel Attachments ?

	Posted Timestamp	Uploaded By	* Person	* Attachment Type	Description	* File Name	Actions
Add:			<input type="text" value="select"/>	<input type="text" value="select"/>	<input type="text"/>	<input type="text"/> Browse...	<input type="button" value="Add"/>
1:	06/30/2016 10:31 AM	Bozza, Thomas J.	Daniel E. Bunker	Biosketch		Biosketch.pdf	<input type="button" value="View"/> <input type="button" value="Delete"/> <input type="button" value="Replace"/>

> The user can also add internal attachments (same steps as for the proposal and personnel attachments).

Internal Attachments (1)

Add Internal Attachments ?

	Posted Timestamp	Uploaded By	* Attachment Type	Description	* File Name	Actions
Add:			<input type="text" value="select"/>	<input type="text"/>	<input type="text"/> Browse...	<input type="button" value="Add"/>
1:	10/14/2015 03:20 PM	Bozza, Thomas J.	Other Institutional Attachment	Internal Attachment 10-14-15	Export Control Questions.docx	<input type="button" value="View"/> <input type="button" value="Replace"/> <input type="button" value="Delete"/> <input type="button" value="View/Edit Rights"/>

- The user can add Abstracts, by selecting type and details. Once added, each abstract will appear as a line item.

Abstracts and Attachments

Questions

Budget Versions

Permissions

Proposal Summary

Proposal Actions

Medusa

Internal Attachments (1)

Abstracts (1)

Abstracts

	Posted Timestamp	Author	* Abstract Type	Abstract Details	Actions
Add:			select		Add
1	10/14/2015 03:22 PM	Bozza, Thomas J.	Other Facilities	Abstract 10-14-15	Delete

- The user can add notes to the proposal by entering a topic and note text. Once added, each will appear as a line item.

Notes (1)

Notes

	Posted Timestamp	Author	* Note Topic	* Note Text	Actions
add:					Add
1	10/14/2015 03:25 PM	Bozza, Thomas J.	10-14-15 Note topic	TJB is writing a note on 10-14-15	

➤ The user can also delete the abstracts.

	Posted Timestamp	Author	* Abstract Type	Abstract Details	Actions
Add:			<input type="text" value="select"/>	<input type="text"/>	<input type="button" value="Add"/>
1	10/14/2015 03:22 PM	Bozza, Thomas J.	Other Facilities	Abstract 10-14-15	<input type="button" value="Delete"/>

Are you sure you want to delete the Other Facilities abstract?

QUESTIONS TAB

- The Questions tab will include 2 sections: a Grants.gov questionnaire and a proposal questionnaire. Both questionnaires are to be answered by all key personnel.

Proposal

S2S

Key Personnel

Special Review

Abstracts and Attachments

Questions

Budget Versions

Permissions

Proposal Summary

Proposal Actions

Medusa

Document was successfully saved.

* Indicates required field

Grants.gov S2S Questionnaire (Complete)

Questions Print

Does this application reflect a change in principal investigator/program director from that indicated on a previous application? [More Information...](#)

Yes No

Does this application reflect a change in grantee institution from that indicated on a previous application? [More Information...](#)

Yes No

Is this a Renewal Application? [More Information...](#)

Yes No

If this application does not result in an award, is the Government permitted to disclose the title of your proposed project, and the name, address, telephone number and e-mail address of the official signing for the applicant organization, to organizations that may be interested in contacting you for further information (e.g., possible collaborations, investment)? [More Information...](#)

Yes No

Is a Clinical Trial part of this project? [More Information...](#)

Yes No

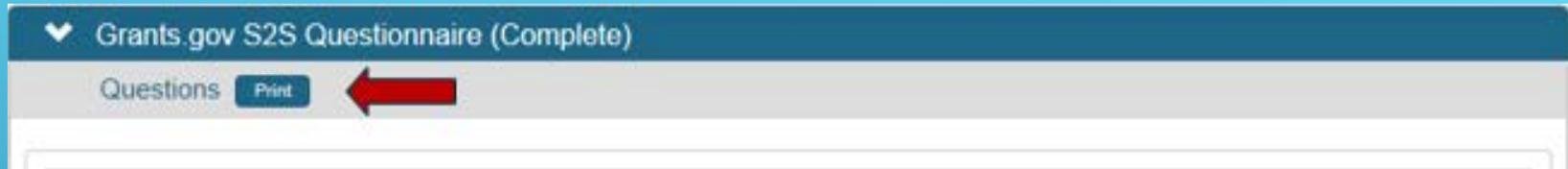
- The user will answer some questions which will lead to further questions. Example: 'Is the proposal subject to review by state executive order 12372 process?' If answered YES, an additional question will appear prompting a response (the entering of a date).

A screenshot of a survey form with several questions. The questions are: 'Is the research performance site designated, or eligible to be designated, as a historic place?', 'Does this project involve activities outside of the United States or partnerships with international collaborators?', 'Is this application being submitted to other agencies?', 'Is the proposal subject to review by state executive order 12372 process?', and 'If Yes: Please provide the date the application was made available for review (submitted to the state). Enter in MM/DD/YYYY format.' Each question has a 'More information...' link. The 'Yes' radio button for the fourth question is selected, and a red arrow points to it. A red arrow also points to the date input field in the fifth question.

- If answered NO, an additional question will be listed asking whether or not the program is covered by executive order 12372.

A screenshot of a survey form showing the 'No' option selected for the question 'Is the proposal subject to review by state executive order 12372 process?'. A red arrow points to the 'No' radio button. Below this question is another question: 'If No: Is the program not selected for review or not covered by E.O. 12372? Select a response.' A dropdown menu is shown with the text 'Program not covered by EO 12372' and a downward arrow. A red arrow points to this dropdown menu.

- The user can also print the questionnaire. The user will click 'Print' and a window will appear with options to Open, Save or Cancel.



The user will click 'Open' and the questionnaire in PDF form will appear.



Questionnaire

Questionnaire Name:	GG S2S Forms		
Description:	Multiple Grants.gov forms: NASA Other Project Information, NASA PIA/OR Data Sheet, PHS 398 Checklist, PHS 398 Cover Page Supplement, RR Other Information, SF 424 R&R, SF 424, ED SF424 Supplement		
Module:	Proposal Development	Sub Module:	
Proposal Number:	91	Principal Investigator:	Alexander M. Haimovich
Title:	TJB Proposal 10-15-15		

- Will any civil service personnel work on this project?
 - Please record the total number of civil service FTE's by Government fiscal year in the upcoming questions. Up to six (6) fiscal years can be detailed on this form.
 - Select a Government Fiscal Year from the list to report the FTE's (Form version 1-0 supports years 2006-2021)
 - Enter the Number of FTE's for the selected Fiscal Year.
 - Is there another year to report?
 - Select a Government Fiscal Year from the list to report the FTE's (Form version 1-0 supports years 2006-2021)
 - Enter the Number of FTE's for the selected Fiscal Year.
 - Is there another year to report?
 - Select a Government Fiscal Year from the list to report the FTE's (Form version 1-0 supports years 2006-2021)
 - Enter the Number of FTE's for the selected Fiscal Year.
 - Is there another year to report?
 - Select a Government Fiscal Year from the list to report the FTE's (Form version 1-0 supports years 2006-2021)

➤ The user will also answer the Proposal Questions (internal- specific to NJIT).

➤ Note: If compliance (IRB/IACUC/Bio-Safety) questions are answered Yes, the user will need to enter the details on the Special Review tab.

Proposal Questions (Complete)
Questions [Print](#)

Does your research project include the use of mandatory cost share? [More Information...](#)
 Yes No

Does your research project include the use of voluntary cost share? [More Information...](#)
 Yes No

Does your research project include the use of human subjects (IRB)? If yes, please enter information into the Special Review page. [More Information...](#)
 Yes No

Does your research project include the use of animal subjects (IACUC)? If yes, please enter information into the Special Review page. [More Information...](#)
 Yes No

Does your research project include the use of biohazards (Biosafety)? If yes, please enter information into the Special Review page. [More Information...](#)
 Yes No

Does the project require additional facilities or space outside of your existing facilities? [More Information...](#)
 Yes No

➤ There is also a question pertaining to Export Controls. Only if answered 'Yes', a text box will appear for further elaboration by the user.

Does your research include any of the following? Foreign nationals; Work outside of the USA; International Sponsor; Development or use of any data, hardware, materials, technology, software or services on the US Munitions List/Commerce Control List; Development or Use of encrypted software in which you will have access to the applicable source code; The shipment of, or travel abroad with material/prototype/samples (including biological/hazardous materials/equipment/hardware/technology/software/technical drawings/schematics/data (For more information on Export Control, please see <http://www.njit.edu/research/compliance/export-control.php>) [More Information...](#)
 Yes No

Please explain. [More Information...](#)

0 of 1000

- The user can also print the questionnaire. The user will click 'Print' and a window will appear with options to Open, Save or Cancel.



- The user will click 'Open' and the questionnaire in PDF form will appear.



Questionnaire

Questionnaire Name: Project Questionnaire_Questions Page
Description: Project Questionnaire_Questions Page
Module: Proposal Development Sub Module:
Proposal Number: 76 Principal Investigator: Alexander M. Haimovich
Title: proposal 10-13-15

- Does your research project include the use of mandatory cost share?
Yes
- Does your research project include the use of voluntary cost share?
- Does your research project include the use of human subjects (IRB)? If yes, please enter information into the Special Review page.
- Does your research project include the use of animal subjects (IACUC)? If yes, please enter information into the Special Review page.
- Does your research project include the use of biohazards (Biosafety)? If yes, please enter information into the Special Review page.
- Does the project require additional facilities or space outside of your existing facilities?
Yes
- Does the project require additional equipment requiring renovation/construction/additional space?
Yes
- Does your research include any of the following? Foreign nationals; Work outside of the USA; International Sponsor; Development or use of any data, hardware, materials, technology, software or services on the US Munitions List/Commerce Control List; Development or Use of encrypted software in which you will have access to the applicable source code; The shipment of, or travel abroad with material/prototype/samples (including biological/hazardous materials/equipment/hardware/technology/software/technical drawings/schematics/data (For more information on Export Control, please see <http://www.njit.edu/research/compliance/export-control.php>)
Yes
 - Please explain: This is my explanation regarding Export Controls.

BUDGET VERSIONS TAB

➤ The user first needs to enter a name for the budget and then click add.

Proposal Development Document 

Document Number : 6395
Initiator Network Id : bozza
Sponsor/S2S : NJ DEPT. OF TRANSPORTATION/None

Document Status : In Progress
Creation Timestamp : 08:57 AM 06/21/2016
Principal Investigator : Daniel E. Bunker

Document was successfully saved.  * Indicates required field

- Proposal
- S2S
- Key Personnel
- Special Review
- Abstracts & Attachments
- Questions
- Budget Versions**
- Permissions
- Proposal Summary
- Proposal Actions
- Medusa

Budget Versions (08/01/2016 - 07/31/2017)

Budget Versions 

* Name	Version #	Direct Cost	F & A	Total	Budget Status	Final	Actions
Add: <input type="text" value="Budget 6-21-16"/> 							

➤ The user will open up the budget to navigate to the Budget tabs.

Budget Versions (08/01/2016 - 07/31/2017)

Budget Versions 

* Name	Version #	Direct Cost	F & A	Total	Budget Status	Final	Actions
Add: <input type="text"/>							
 Budget 6-21-16	1	0.00	0.00	0.00	<input type="text" value="select"/>	<input type="checkbox"/>	 
Residual Funds:		F&A Rate Type: MTDC - Federal					
Cost Sharing:	0.00	Last Updated:		Jun 21, 2016 9:04:38 AM			
Unrecovered F&A:	0.00	Last Updated By:		bozza			
Comments:							

➤ If an existing budget is attached to the proposal, the user has the option to create another version of the budget based on the existing budget. The user will click 'Copy' button.

▼ Budget Versions (07/01/2016 - 06/30/2018)

Budget Versions ⓘ

* Name	Version #	Direct Cost	F & A	Total	Budget Status	Final	Actions
Add: <input type="text"/>							<input type="button" value="Add"/>
<input type="button" value="Hide"/> BUDGET TEST	1	74,688.34	39,958.27	114,646.61	Incomplet ▼	<input type="checkbox"/>	<input type="button" value="Open"/> <input type="button" value="Copy"/>
Residual Funds:		F&A Rate Type: MTDC - Federal					
Cost Sharing:	0.00	Last Updated: Jun 21, 2016 9:07:55 AM					
Unrecovered F&A:	0.00	Last Updated By: bozza					
Comments:							

➤ The user will have the option to copy all periods or copy 1 period only. For this example, the user will copy 1 period only.

A new version of the budget will be created based on version 1.

➤ The new version of the budget will be listed below the original budget.

<input type="button" value="Hide"/> BUDGET TEST	1	74,688.34	39,958.27	114,646.61	select ▼	<input type="checkbox"/>	<input type="button" value="Open"/> <input type="button" value="Copy"/>
Residual Funds:		F&A Rate Type: MTDC - Federal					
Cost Sharing:	0.00	Last Updated: Jun 21, 2016 9:07:56 AM					
Unrecovered F&A:	0.00	Last Updated By: bozza					
Comments:							
<input type="button" value="Hide"/> BUDGET TEST 1 copy		42,475.00	22,724.13	65,199.13	select ▼	<input type="checkbox"/>	<input type="button" value="Open"/> <input type="button" value="Copy"/>
Residual Funds:		F&A Rate Type: MTDC - Federal					
Cost Sharing:	0.00	Last Updated: Jun 21, 2016 9:12:38 AM					
Unrecovered F&A:	0.00	Last Updated By: bozza					

PARAMETERS TAB

The user will enter in the Total Direct Cost Limit, Total Cost Limit, Comments, whether the activity is performed on/off campus and whether the cost sharing will/will not be submitted to the sponsor. Once all is entered, user clicks 'Save'.

Budget Versions

Parameters ←

Rates

Summary

Personnel

Non-Personnel

Distribution & Income

Modular Budget

Budget Actions

▼ Budget Overview

Budget Overview ⓘ

Project Start Date : 08/01/2016

Project End Date : 07/31/2017

Total Direct Cost Limit : ←

Budget Status : ▼

Final?

On/Off Campus : ▼ ←

Comments : ←

Modular Budget?

Residual Funds :

Total Cost Limit : ←

Unrecovered F & A Rate Type : ▼

F&A Rate Type : ▼

Submit Cost Sharing? ←

▶ Budget Periods & Totals

Generate All Periods Calculate All Periods Default Periods **Save** Reload Close

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RATES TAB

- The user has the option to change the RESEARCH F & A, FRINGE BENEFITS & INFLATION rates.
 - Note: the process is the same for Research F & A, Fringe and Inflation.
 - The user will enter a new rate under 'applicable rate', followed by clicking 'Save'.

Research F & A

Research F & A ⓘ

Description	On CampusContract	Fiscal Year	Start Date	Institute Rate	* Applicable Rate
MTDC Federal	No	2017	07/01/2016	26.00	<input type="text" value="30.00"/>
MTDC Federal	Yes	2017	07/01/2016	53.50	<input type="text" value="53.50"/>
MTDC State	No	2017	07/01/2016	10.00	<input type="text" value="10.00"/>
MTDC State	Yes	2017	07/01/2016	10.00	<input type="text" value="10.00"/>

- A window will appear, the user will click 'Yes'.

Do you want to save the modified rates? Saving changes will cause the system to recalculate the budget.

- When the message displayed is 'Document was successfully saved', this means that the rate has been successfully modified.

• Document was successfully saved. ✕

➤ The user chooses to reset the each set of rates back to what were initially entered. A window will follow, the user will click 'Yes'.

Research F & A

Research F & A ?

Description	On CampusContract	Fiscal Year	Start Date	Institute Rate	* Applicable Rate
MTDC Federal	No	2017	07/01/2016	26.00	<input type="text" value="30.00"/>
MTDC Federal	Yes	2017	07/01/2016	53.50	<input type="text" value="53.50"/>
MTDC State	No	2017	07/01/2016	10.00	<input type="text" value="10.00"/>
MTDC State	Yes	2017	07/01/2016	10.00	<input type="text" value="10.00"/>



Do you want to undo changes within this rate type's Applicable Rate fields and reset rates to match existing Institute Rates? This action will cause recalculation of the budget.



➤ The rate is reset to its initial rate.

Research F & A

Research F & A ?

Description	On CampusContract	Fiscal Year	Start Date	Institute Rate	* Applicable Rate
MTDC Federal	No	2017	07/01/2016	26.00	<input type="text" value="26.00"/>



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➤ The user chooses to have the rates reflect the current NJIT rates. A window will follow, the user will click 'Yes'.

Research F & A

Research F & A ?

Description	On CampusContract	Fiscal Year	Start Date	Institute Rate	* Applicable Rate
MTDC Federal	No	2017	07/01/2016	26.00	27.50
MTDC Federal	Yes	2017	07/01/2016	53.50	53.50
MTDC State	No	2017	07/01/2016	10.00	10.00
MTDC State	Yes	2017	07/01/2016	10.00	10.00



Do you want to sync this rate type's Institute Rates & Applicable Rates with the current Institute Rates identified in the Unit Hierarchy rate table? This will override the existing rates within both columns and cause recalculation of the budget.



➤ The current NJIT rates will now be reflected.

Research F & A

Research F & A ?

Description	On CampusContract	Fiscal Year	Start Date	Institute Rate	* Applicable Rate
MTDC Federal	No	2017	07/01/2016	26.00	26.00

The user can either Reset all sets of rates simultaneously or Sync all rates simultaneously.

PERSONNEL TAB

- The salaries and appointment types for all key personnel selected on the proposal will be displayed.
- The user also has the option to Delete personnel as well (followed by answering 'Yes').

The screenshot shows the 'Personnel' tab in a software interface. On the left is a navigation menu with options: Rates, Summary, Personnel (highlighted with a red arrow), Non-Personnel (highlighted with a red arrow), Distribution & Income, Modular Budget, and Budget Actions. The main area is titled 'Project Personnel (All Periods)' and contains a table of personnel. The table has columns for Person, Job Code, Appointment Type, Base Salary, Salary Effective Date, Salary Anniversary Date, and Actions. A red arrow points to the 'Delete Base Salary by Period' button in the Actions column for the first row, which is for Daniel E. Bunker, an Associate Professor with a 9M DURATION appointment and a base salary of 99,702.00. A 'Sync Personnel' button is located at the bottom of the table.

Person	Job Code :	Appointment Type :	* Base Salary :	* Salary Effective Date :	Salary Anniversary Date :	Actions
1 Daniel E. Bunker (Principal Investigator)	B1006 Associate Professor	9M DURATION	99,702.00	08/01/2016		Delete Base Salary by Period

Are you sure you want to delete Daniel E. Bunker?

Yes No

A red arrow points to the 'Yes' button.

- The user can reinstate the deleted person to the budget by clicking the 'Sync Personnel' button.
- The key person will reappear on the screen.

This screenshot shows the same 'Project Personnel (All Periods)' interface as the previous one, but the 'Delete' button is no longer visible. A red arrow points to the 'Sync Personnel' button at the bottom of the table.

This screenshot shows the 'Project Personnel (All Periods)' interface after clicking 'Sync Personnel'. Daniel E. Bunker has reappeared in the list. A red arrow points to his name in the 'Person' column. On the right side of the interface, there is a large number '55' and a 'Delete Base Salary by Period' button.

Person	Job Code :	Appointment Type :	* Base Salary :	* Salary Effective Date :	Salary Anniversary Date :	Actions
1 Daniel E. Bunker (Principal Investigator)	B1006 Associate Professor	9M DURATION	99,702.00	08/01/2016		Delete Base Salary by Period

- The personnel detail section is where the user will calculate the salary costs for a particular budget based on the full salary stated the Project Personnel section.
 - The user will select the person and the object code name, followed by clicking 'Add'.

Personnel Detail (Period 1)

Add Details

* Person	* Object Code Name	Group	Action
Daniel E. Bunker - B1006	Faculty Summer R	select -or- (new group)	Add

- The user can include the personnel into separate groups when multiple persons share similar special charges (i.e. off-campus F&A rate, no inflation, or submit/do not submit cost sharing details), followed by clicking 'Add'.

* Person	* Object Code Name	Group	Action
Daniel E. Bunker - B1006	Faculty Summer R	select -or- Bio Science	Add

- The name of the group will be listed on the line item.

Hide Faculty Summer Research/Bio Science

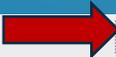
- The PI will be listed as a line item. The user will select the start and end dates, % effort, % charged and period type (optional). The user will click 'Calculate'.

1	Person Daniel E. Bunker - B1006	* Start Date 08/01/2016	* End Date 08/31/2016	% Effort 100	% Charged 100	
	Period Type Calendar	Requested Salary 0.00	Calculated Fringe 0.00	Calculate	Details	Delete
Totals:		0.00	0.00			

- The Requested Salary and Fringe will be calculated driven by the start and end dates. Since this is summer pay, there will be no calculated fringe amount.

Requested Salary	Calculated Fringe
11,078.00	0.00
11,078.00	0.00

- The user can view more details, including 'Submit Cost Sharing?' If the user wishes to not submit the cost sharing amount to the sponsor for this particular line item, the user will uncheck the box. Otherwise, it will be checked by default.

 **Hide** Faculty Summer Research/Bio Science Details

Budget Category	Senior Personnel	# of Person (s)	1
Unrecovered F&A	0.00	Cost Sharing	0.00
Apply Inflation?	<input checked="" type="checkbox"/>	On/Off Campus	<input checked="" type="checkbox"/>
Submit Cost Sharing?	<input checked="" type="checkbox"/>		
Budget Justification Notes	<input type="text"/>	Group Description	<input type="text"/>

- The user can view additional details pertaining to the F & A rate. The user can select whether or not Indirect Cost will be applied or not be applied to the budgeted item. Indirect cost will automatically be applied (the box under 'Apply Rate' will be checked off by default). If 'Apply Rate' was unchecked, the rate cost would be 0.00.

Hide Rate Classes				
Rate Class	Rate Type	Apply Rate?	Rate Cost	Rate Cost Sharing
MTDC - Federal	MTDC Federal	<input checked="" type="checkbox"/>	5,926.73	0.00

- The user wishes to apply cost sharing to the budget.

- Note: To create the cost sharing, the % effort must be a higher % than % charged. To make an entry that only reflects expenses to be charged to NJIT, the user can enter a % effort and leave % charged as zero.

1	Person Daniel E. Bunker - B1006	* Start Date 08/01/2016	* End Date 08/31/2016	% Effort 50	% Charged 25	
	Period Type Calendar	Requested Salary 11,078.00	Calculated Fringe 0.00	Calculate	Details	Delete
Totals:		11,078.00	0.00			

- The Requested Salary will be calculated driven by the % effort and % charged difference.

Requested Salary
2,769.50
2,769.50

- The user can verify that the Cost Sharing amount is populated.

Hide Faculty Summer Research/Bio Science Details			
Budget Category	Senior Personnel	# of Person (s)	1
Unrecovered F&A	0.00	Cost Sharing	2,769.50
Apply Inflation?	<input checked="" type="checkbox"/>	On/Off Campus	<input checked="" type="checkbox"/>
Submit Cost Sharing?	<input checked="" type="checkbox"/>		
Budget Justification Notes		Group Description	

➤ The user can view additional details pertaining to the cost sharing rate.

Hide Rate Classes				
Rate Class	Rate Type	Apply Rate?	Rate Cost	Rate Cost Sharing
MTDC - Federal	MTDC Federal	<input checked="" type="checkbox"/>	1,481.68	1,481.68

➤ The user can view additional details on the Personnel Budget Details screen.

1	Person Daniel E. Bunker - B1006	* Start Date 08/01/2016	* End Date 08/31/2016	% Effort 50.00	% Charged 25.00
	Period Type Calendar	Requested Salary 2,769.50	Calculated Fringe 0.00	Calculate	Details
Totals:		2,769.50	0.00		

Personnel Budget Details

Personnel Budget Details - Daniel E. Bunker

Effective Period 08/01/2016 to 08/31/2016

% Effort 50.00

% Charged 25.00

Description

Unrecovered F&A 0.00

Cost Sharing Amount 2,769.50

Cost Sharing Percent 25.00

Person Months 0.50

➤ In addition to the key personnel (PI, Co-Investigator and Key Person), the user can also budget additional personnel (i.e. Graduate Assistants). The user will select 'Person' as is 'Summary' and the object code name, followed by clicking 'Add'.

Personnel Detail (Period 1)

Add Details

* Person	* Object Code Name	Group	Action
Summary	Graduate Assistan	(new group)	Add

➤ The user enters the start and end dates and requested salary for the graduate assistant.

Hide Graduate Assistant Stipend

* Start Date	* End Date	Requested Salary	Calculated Fringe	Calculate	Delete
08/01/2016	07/31/2017	35000	0.00		

➤ The user can budget the graduate student's stipend for all periods following period 1.

Hide Graduate Assistant Stipend Details

Budget Category	Graduate Students	# of Person (s)	0
Unrecovered F&A	0.00	Cost Sharing	0.00
Apply Inflation?	<input checked="" type="checkbox"/>	On/Off Campus	<input checked="" type="checkbox"/>
Submit Cost Sharing?	<input checked="" type="checkbox"/>		
Budget Justification Notes		Group Description	

Show Rate Classes

Apply To Later Periods Sync to Cost Limit

➤ The user will verify that the graduate student's stipend has been budgeted for all periods following period 1.

Parameters ←

Rates

Summary

Personnel

Non-Personnel

Distribution & Income

Modular Budget

Budget Actions →

Budget Periods & Totals

Budget Periods ?

Actions	#	Period Start Date	Period End Date	No. of Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sh
Add		<input type="text"/>	<input type="text"/>		<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text"/>
Delete	1	<input type="text" value="08/01/2016"/>	<input type="text" value="07/31/2017"/>	12.0	57,976.18	37,769.50	20,206.68	0.00	4,
	2	<input type="text" value="08/01/2017"/>	<input type="text" value="07/31/2018"/>	12.0	55,605.38	36,225.00	19,380.38	0.00	

➤ The user can also add a 'To be Named' person who will be sought to perform a particular kind of work based on an area of expertise.

Project Personnel (All Periods)

Changes made in the Project Personnel panel must be saved before the corresponding results are reflected in the Personnel Details panel.

Project Personnel (All Periods) ?

Person	Job Code :	Appointment Type :	* Base Salary :	* Salary Effective Date :	Salary Anniversary Date :	Actions
Add:	Employee Search ?					
	Non-employee Search ?					
	To be named ?					

➤ The user searches for and selects the person to be named.

To Be Named Persons Lookup

* required field

TBN Id:

Person Name:

Job Code:  



Viewing rows 1 to 6

[Select All Rows](#) [Unselect All Rows](#) [Select all from this page](#) [Deselect all from this page](#) [Return selected results](#)

Select?	TBN Id	Person Name	Job
<input type="checkbox"/>	1	TBA Research	Default Job Code Title
<input checked="" type="checkbox"/>	2	Research Associate	Default Job Code Title

➤ The 'to be named' person will be listed as a line item in the Project Personnel section.

Project Personnel (All Periods)

	Person	Job Code :	Appointment Type :	* Base Salary :	* Salary Effective Date :	Salary Anniversary Date :	Actions
Add:	Employee Search	Non-employee Search	To be named				
1	Daniel E. Bunker (Principal Investigator)	B1006 Associate Professor	9M DURATION	99,702.00	08/01/2016		Delete Base Salary by Period
2	Research Associate	AA000 Default Job Code Title	12M DURATION	0.00	08/01/2016		Delete Base Salary by Period

➤ The user can click the 'View Personnel Salaries' button to view a PDF version of all personnel salaries for the budget periods.

Personnel Detail (Period 1)

Add Details

* Person * Object Code Name Group Action

Select select (new group) Add

Show Faculty Summer Research/Bio Science

Show Graduate Assistant Stipend

Calculate Current Period **View Personnel Salaries** Save Reload Close

Do you want to open or save Budget+Salary+Report-6395.pdf (8.31 KB) from config-kc.njit.ekualiti.com?

Open Save Cancel

Ekualiti Proposal Development - Salary requested on proposal budget

Proposal Number: 530
 Start Date: 08/01/2016
 Comments:

Budget Version: 1
 End Date: 07/31/2018

Cost Element	Name	Period 1	Period 2	Total
Faculty Summer Research				
	Daniel E. Bunker	\$2,769.50	\$0.00	\$2,769.50
Graduate Assistant Stipend				
	Summary Line Item	\$35,000.00	\$36,225.00	\$71,225.00
Calculated Amount				
	OH - MTDC Federal	\$20,206.68	\$19,380.38	\$39,587.06
	Total	\$57,976.18	\$55,605.38	\$113,581.56

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➤ NON-PERSONNEL TAB

- The user will add Equipment expenses to the budget by selecting the object code, entering the amount and clicking 'Add'.
Description and Quantity are optional fields. Once added, the equipment expense will appear as a line item.

Summary

Personnel

Non-Personnel ←

Distribution & Income

Modular Budget

Budget Actions

Equipment

Equipment ⓘ

* Object Code Name	Description	Quantity	Total Base Cost	Action
Add: Equipment - Non-capital < \$5K			2000	Add

1 → Equipment - Non-capital < \$5K 71100A

2,000.00

Delete

- The user can enter additional details to each expense, including Budget Justification Notes.

Hide Line Item Details

* Start Date 08/01/2016

* End Date 07/31/2017

Apply Inflation? No

Budget Category Equipment

Budget Justification Notes This is my equipment expense for 6-22-16

Unrecovered F&A 0.00

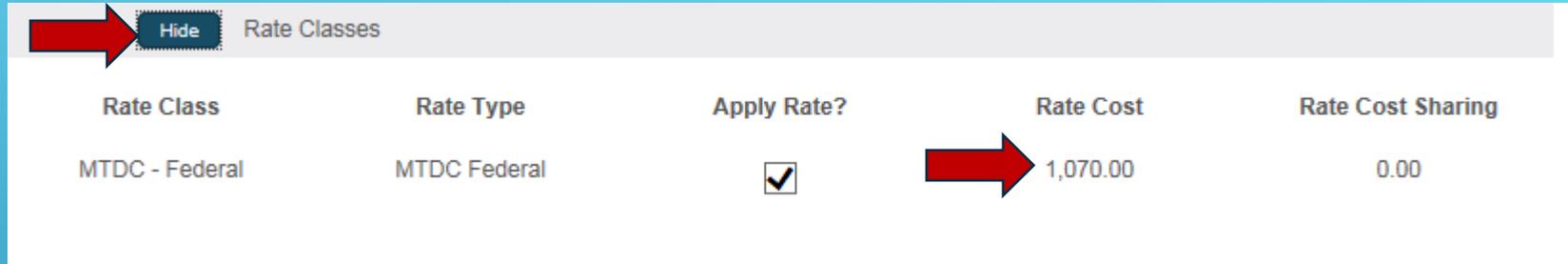
Cost Sharing 0.00

On/Off Campus

Submit Cost Sharing?

➤ Since this particular expense carries indirect cost, the user will verify the indirect cost amount.

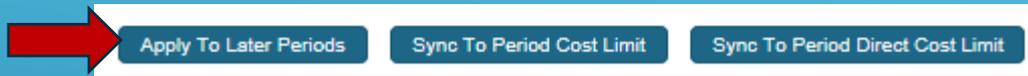
➤ Note: the Indirect Cost details will appear in this section for all Non-Personnel expenses.



A screenshot of a 'Rate Classes' table. A red arrow points to a 'Hide' button in the top left corner. The table has five columns: 'Rate Class', 'Rate Type', 'Apply Rate?', 'Rate Cost', and 'Rate Cost Sharing'. The first row contains the following data: 'MTDC - Federal', 'MTDC Federal', a checked checkbox, '1,070.00', and '0.00'. A red arrow points to the '1,070.00' value in the 'Rate Cost' column.

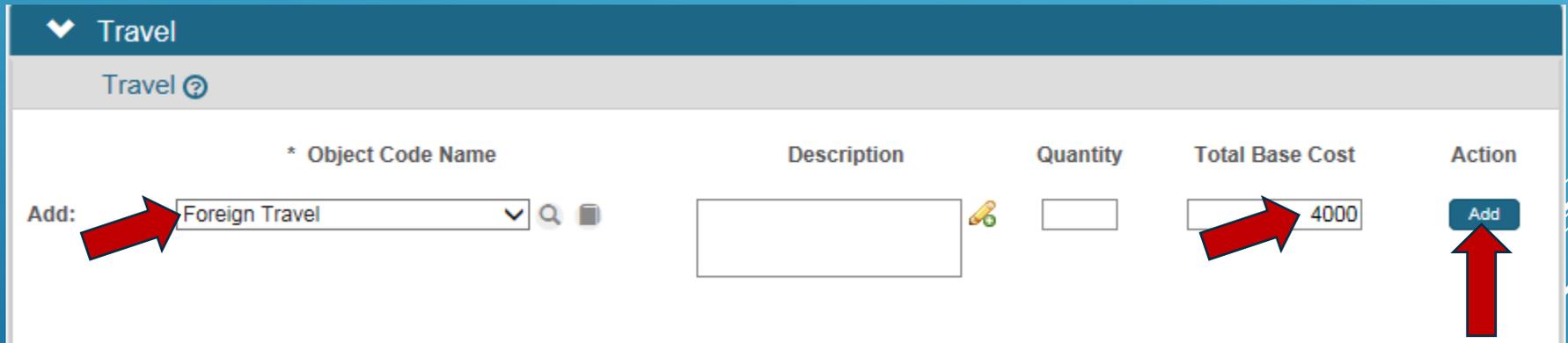
Rate Class	Rate Type	Apply Rate?	Rate Cost	Rate Cost Sharing
MTDC - Federal	MTDC Federal	<input checked="" type="checkbox"/>	1,070.00	0.00

➤ The user can budget this equipment expense for all periods following period 1.



A screenshot showing three buttons: 'Apply To Later Periods', 'Sync To Period Cost Limit', and 'Sync To Period Direct Cost Limit'. A red arrow points to the 'Apply To Later Periods' button.

➤ The user will add Travel expenses to the budget by selecting the object code, entering the amount and clicking 'Add'. Description and Quantity are optional fields. Once added, the travel expense will appear as a line item.



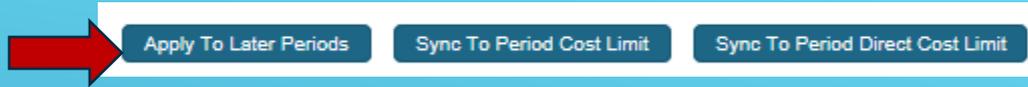
A screenshot of a 'Travel' form. The form has a header 'Travel' and a sub-header 'Travel'. Below the header is a table with columns: '* Object Code Name', 'Description', 'Quantity', 'Total Base Cost', and 'Action'. The 'Add:' label is on the left. The 'Object Code Name' dropdown is set to 'Foreign Travel'. The 'Total Base Cost' input field contains '4000'. The 'Action' column has an 'Add' button. Red arrows point to the 'Foreign Travel' dropdown, the '4000' input, and the 'Add' button.

➤ The user can enter additional details to each expense, including Budget Justification Notes by clicking the Show button. Note: if entering additional details, please repeat this step in slide #66.



A screenshot of a 'Travel' line item. The line item is numbered '1' and has the following details: 'Foreign Travel' with object code '741008', an empty 'Description' field, an empty 'Quantity' field, and a 'Total Base Cost' of '4,000.00'. A 'Show' button is located below the line item. A red arrow points to the 'Show' button. A red arrow also points to the 'Foreign Travel' text. A 'Delete' button is visible on the right side of the line item.

➤ The user can budget this travel expense for all periods following period 1.



➤ The user will add Participant Support expenses to the budget by selecting the object code, entering the amount and clicking 'Add'. Description and Quantity are optional fields. Once added, the participant support expense will appear as a line item.

A form titled 'Participant Support' with a sub-header 'Participant Support'. It includes a 'Number of Participants' input field. Below is a table with columns: '* Object Code Name', 'Description', 'Quantity', 'Total Base Cost', and 'Action'. The 'Add:' row shows 'Participant Support' selected in the dropdown, an empty description box, an empty quantity box, and '1000' in the total base cost box. A red arrow points to the 'Add' button. Another red arrow points to the 'Participant Support' dropdown.

➤ The user can enter additional details to each expense, including Budget Justification Notes by clicking the 'Show' button.
Note: if entering additional details, please repeat this step in slide #66.

A budget line item for 'Participant Support' with object code '756916'. It shows a total base cost of '1,000.00' and a 'Delete' button. A red arrow points to the object code. Below the line item is a 'Show Line Item Details' button, with another red arrow pointing to it.

➤ The user can budget this participant support expense for all periods following period 1.



- The user will add Other Direct expenses to the budget by selecting the object code, entering the amount and clicking 'Add'. Description and Quantity are optional fields. Once added, the participant support expense will appear as a line item.

Other Direct

Other Direct ?

	* Object Code Name	Description	Quantity	Total Base Cost	Action
Add:	Supplies			1000	Add

- The user can enter additional details to each expense, including Budget Justification Notes by clicking the 'Show' button.
Note: if entering additional details, please repeat this step in slide #66.

1

Supplies
734000

1,000.00

Delete

Show Line Item Details

- The user can budget this other direct expense for all periods following period 1.

Apply To Later Periods Sync To Period Cost Limit Sync To Period Direct Cost Limit

➤ The user can view a full-detail summary of period 1 (listed by default).

Budget Period: View:

▼ Budget Overview (Period 1)

Budget Overview (Period 1)

Period 1 Start Date	08/01/2016	Cost Limit	0.00
Period 1 End Date	07/31/2017	Total Cost Limit	300,000.00
Direct Cost	45,769.50	Direct Cost Limit	0.00
F&A Cost	24,486.68	Total Direct Cost Limit	200,000.00
Unrecovered F&A	0.00	Cost Sharing	4,251.18
Total Sponsor Cost	70,256.18		

➤ The user can view a full-detail summary of period 2 by selecting the budget period and clicking 'Update View'.

Budget Period: View:

▼ Budget Overview (Period 2)

Budget Overview (Period 2)

Period 2 Start Date	08/01/2017	Cost Limit	0.00
Period 2 End Date	07/31/2018	Total Cost Limit	300,000.00
Direct Cost	38,225.00	Direct Cost Limit	0.00
F&A Cost	20,450.38	Total Direct Cost Limit	200,000.00
Unrecovered F&A	0.00	Cost Sharing	0.00
Total Sponsor Cost	58,675.38		

PARAMETERS TAB

If the user wishes to send the budget to the sponsor as a Modular Budget, the user will check off the box next to 'Modular Budget'.

Note: Please see the Modular Budget tab (slides 77-78) for the steps on how to create the Modular Budget.

Budget Overview

Budget Overview ⓘ

Project Start Date :	08/01/2016	Modular Budget?	<input checked="" type="checkbox"/>
Project End Date :	07/31/2018	Residual Funds :	<input type="text"/>
Total Direct Cost Limit :	<input type="text" value="200,000.00"/>	Total Cost Limit :	<input type="text" value="300,000.00"/>
Budget Status :	Incomplete ▾	Unrecovered F & A Rate Type :	MTDC - Federal ▾
Final?	<input type="checkbox"/>	F&A Rate Type :	MTDC - Federal ▾
On/Off Campus :	Default ▾	Submit Cost Sharing?	<input checked="" type="checkbox"/>
Comments :	<input type="text"/>		

If no total cost limit or total direct cost limit were entered prior to creation of the budget, the user can manually enter a cost limit value for a budget period, followed by clicking 'Save'.

Budget Periods & Totals

No. of Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit
	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>					
12.0	61,046.18	39,769.50	21,276.68	0.00	4,251.18	<input type="text" value="300,000.00"/>	<input type="text" value="200,000.00"/>



- The user makes note of the total sponsor cost and cost limit.
- The user enters the total base cost of the equipment expense, clicks 'Add'.

Budget Overview (Period 1)

Period 1 Start Date	08/01/2016	Cost Limit	300,000.00
Period 1 End Date	07/31/2017	Total Cost Limit	0.00
Direct Cost	37,769.50	Direct Cost Limit	200,000.00
F&A Cost	20,206.68	Total Direct Cost Limit	0.00
Unrecovered F&A	0.00	Cost Sharing	4,251.18
Total Sponsor Cost	57,976.18		

Equipment

* Object Code Name	Description	Quantity	Total Base Cost	Action
Capital Equipment >= \$5K			15000	Add

- The user verifies that the total sponsor cost changed based on the total base cost entered. The user can also recalculate the budget using this expense to goal-seek the value to meet the period cost limit entered in the Parameters tab. The user will click 'Sync To Period Cost Limit' button.

Total Sponsor Cost 72,976.18

Equipment (1 line item)

* Object Code Name	Description	Quantity	Total Base Cost	Action
Capital Equipment >= \$5K 710000			15,000.00	Delete

Line Item Details

* Start Date	08/01/2016	Unrecovered F&A	0.00
* End Date	07/31/2017	Cost Sharing	0.00
Apply Inflation?	No	On/Off Campus	<input checked="" type="checkbox"/>
Budget Category	Equipment	Submit Cost Sharing?	<input checked="" type="checkbox"/>

Budget Justification Notes

Sync To Period Cost Limit **Sync To Period Direct Cost Limit**

➤ The Cost Limit and the Total Sponsor Cost values are now in sync.

➤ Note: The total base cost value has increased.

Budget Overview (Period 1)
The Period Direct Cost Limit has been exceeded.

Budget Overview (Period 1)

Period 1 Start Date	08/01/2016	Cost Limit	300,000.00
Period 1 End Date	07/31/2017	Total Cost Limit	0.00
Direct Cost	279,793.32	Direct Cost Limit	200,000.00
F&A Cost	20,206.68	Total Direct Cost Limit	0.00
Unrecovered F&A	0.00	Cost Sharing	4,251.18
Total Sponsor Cost	300,000.00		

Equipment (1 line item)
Equipment

Add:	* Object Code Name	Description	Quantity	Total Base Cost	Action
	<input type="text" value="select"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="button" value="Add"/>
1	Capital Equipment >= \$5K 710000	<input type="text"/>	<input type="text"/>	<input type="text" value="242,023.82"/>	<input type="button" value="Delete"/>

➤ The user can generate period 2 of the budget based on the details entered for period 1.

Parameters

- Rates
- Summary
- Personnel
- Non-Personnel
- Distribution & Income
- Modular Budget
- Budget Actions

Budget Periods & Totals
Budget Periods

Actions	#	Period Start Date	Period End Date	No. of Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sh
<input type="button" value="Add"/>		<input type="text"/>	<input type="text"/>		<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	
<input type="button" value="Delete"/>	1	08/01/2016	07/31/2017		300,000.00	279,793.32	20,206.68	0.00	4,
<input type="button" value="Delete"/>	2	08/01/2017	07/31/2018	12.0	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	
Totals									
		08/01/2016	07/31/2018	24.0	\$ 300,000.00	\$ 279,793.32	\$ 20,206.68	\$ 0.00	71 \$ 4,

➤ Period 2 is populated mirroring the details and calculations from period 1.

Budget Periods & Totals									
Budget Periods									
Actions	#	Period Start Date	Period End Date	No. of Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sh
Add		<input type="text"/>	<input type="text"/>		<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text"/>
Delete	1	08/01/2016	07/31/2017	12.0	300,000.00	279,793.32	20,206.68	0.00	4,
Delete	2	08/01/2017	07/31/2018		302,029.17	281,115.25	20,913.92	0.00	4,
Totals		08/01/2016	07/31/2018	24.0	\$ 602,029.17	\$ 560,908.57	\$ 41,120.60	\$ 0.00	\$ 8,

➤ DISTRIBUTION & INCOME TAB

➤ If Cost Sharing was applied to the budget, the user can view a breakdown of the Cost Sharing amount(s).

- Budget Versions
- Parameters
- Rates
- Summary
- Personnel
- Non-Personnel
- Distribution & Income**
- Modular Budget
- Budget Actions

▼ Cost Sharing (2)

Cost Sharing Distribution List

	Project Period	Percentage	Source Account	Amount	Actions
Add:	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text"/>	<input type="text" value="0.00"/>	Add
1	1	0.00	<input type="text"/>	4,251.18	Delete
2	2	0.00	<input type="text"/>	4,399.97	Delete
Total Allocated:				\$8,651.15	
Unallocated:				\$0.00	

Cost Sharing Summary

Period 1: 08/01/2016 - 07/31/2017:	\$4,251.18
Period 2: 08/01/2017 - 07/31/2018:	\$4,399.97
Total Cost Sharing:	\$8,651.15

Reset to Default Recalculate

In order for cost sharing to be reported to the sponsor, the user must include source accounts for each cost sharing amount, followed by clicking 'Save'.

Cost Sharing (2)

Cost Sharing Distribution List

	Project Period	Percentage	Source Account	Amount	Actions
Add:	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="button" value="Add"/>
1	<input type="text" value="1"/>	<input type="text" value="0.00"/>	Source Account 1	<input type="text" value="4,251.18"/>	<input type="button" value="Delete"/>
2	<input type="text" value="2"/>	<input type="text" value="0.00"/>	Source Account 2	<input type="text" value="4,399.97"/>	<input type="button" value="Delete"/>



The user can view the Unrecovered F & A for the budget (if any). For this example, there was no uncovered F& A to view. However, if there were, the screen would be populated as follows. The user will click 'Recalculate' to allocate the total amount.

Unrecovered F&A (4)

Unrecovered F&A Distribution List

	Fiscal Year	Applicable Rate	Campus	Source Account	Amount	Actions
Add:	<input type="text"/>	<input type="text"/>	Select	<input type="text"/>	<input type="text" value="0.00"/>	<input type="button" value="Add"/>
1	<input type="text" value="2017"/>	<input type="text" value="10.00"/>	Yes	<input type="text"/>	<input type="text" value="30000"/>	<input type="button" value="Delete"/>
2	<input type="text" value="2017"/>	<input type="text" value="10.00"/>	No	<input type="text"/>	<input type="text" value="20000"/>	<input type="button" value="Delete"/>
3	<input type="text" value="2018"/>	<input type="text" value="10.00"/>	Yes	<input type="text"/>	<input type="text" value="10000"/>	<input type="button" value="Delete"/>
4	<input type="text" value="2018"/>	<input type="text" value="10.00"/>	No	<input type="text"/>	<input type="text" value="11999.82"/>	<input type="button" value="Delete"/>
Total Allocated:					<input type="text" value="\$0.00"/>	
Unallocated:					<input type="text" value="\$71,999.82"/>	<input type="button" value="Delete"/>

Unrecovered F&A Summary

Period 1: 01/01/2017 - 12/31/2017:	<input type="text" value="\$71,999.82"/>
Period 2: 01/01/2018 - 12/31/2018:	<input type="text" value="\$0.00"/>

➤ The total unrecovered F & A amount will be allocated.

Unrecovered F&A (-4)						
Unrecovered F&A Distribution List						
	Fiscal Year	Applicable Rate	Campus	Source Account	Amount	Actions
Add:	<input type="text"/>	<input type="text"/>	<input type="text" value="Select"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="button" value="Add"/>
1	<input type="text" value="2017"/>	<input type="text" value="10.00"/>	<input type="text" value="Yes"/>	<input type="text"/>	<input type="text" value="30,000.00"/>	<input type="button" value="Delete"/>
2	<input type="text" value="2017"/>	<input type="text" value="10.00"/>	<input type="text" value="No"/>	<input type="text"/>	<input type="text" value="20,000.00"/>	<input type="button" value="Delete"/>
3	<input type="text" value="2018"/>	<input type="text" value="10.00"/>	<input type="text" value="Yes"/>	<input type="text"/>	<input type="text" value="10,000.00"/>	<input type="button" value="Delete"/>
4	<input type="text" value="2018"/>	<input type="text" value="10.00"/>	<input type="text" value="No"/>	<input type="text"/>	<input type="text" value="11,999.82"/>	<input type="button" value="Delete"/>
Total Allocated:					<input type="text" value="\$71,999.82"/>	
Unallocated:					<input type="text" value="\$0.00"/>	

➤ The user can also add project income data for any budget period.

Project Income (0)				
Income Details				
	*Period	*Income	*Description	Actions
Add:	<input type="text" value="1: 08/01/2016 - 07/31/2017"/>	<input type="text" value="25000"/>	<input type="text" value="added project income data for period 1"/>	<input type="button" value="Add"/>
Income Summary				
			Period 1 Income:	0.00
			Period 2 Income:	0.00
			Total Income:	0.00

1	1: 08/01/2016 - 07/31/2017	<input type="text" value="25,000.00"/>	<input type="text" value="added project income data for period 1"/>	<input type="button" value="Delete"/>
Income Summary				
			Period 1 Income:	25,000.00
			Period 2 Income:	0.00
			Total Income:	25000.00

➤ MODULAR BUDGET TAB

- If the user must submit a modular budget to the sponsor (only when indicated on Parameters tab- see slide 71), the user will create a Modular Budget based on existing budget. The user will click 'Sync', followed by clicking 'Yes'.

The screenshot shows a navigation menu with the following items:

- Personnel
- Non-Personnel
- Distribution & Income
- Modular Budget** (highlighted with a red arrow)
- Budget Actions

Below the menu are four buttons: **Sync** (highlighted with a red arrow), Save, Reload, and Close.

Are you sure you want to sync the modular budget?

Yes **No**

(A red arrow points to the 'Yes' button.)

- The Modular Budget is created for the entire budget.

Modular Budget Overview (Project)			
Modular Budget Overview (Project) ⓘ			
Project Start Date:	08/01/2016	Project End Date:	07/31/2018
			Project Total Requested Cost: \$ 641,120.60
Direct Cost			
Direct Cost ⓘ			
Direct Cost Less Consortium F&A:	\$ 600,000.00	Consortium F&A:	\$ 0.00
Total Direct Cost:	\$ 600,000.00		
F&A			
F&A ⓘ			
F&A Rate Type	F&A Rate	F&A Base	Funds Requested
1	53.50 %	\$ 37,769.50	\$ 20,206.68
2	53.50 %	\$ 39,091.43	\$ 20,913.92
Total:			\$ 41,120.60

➤ The user can view the Modular Budget for each period by selecting the period and clicking 'Update View'.

Select Modular Budget Period

Budget Period: 1: 08/01/2016 - 07/31/2017

Update View



Modular Budget Overview (Period 1)

Modular Budget Overview (Period 1)

Period 1 Start Date:	08/01/2016	Period 1 Total Requested Cost:	\$ 320,206.68
Period 1 End Date:	07/31/2017	Project Total Requested Cost:	\$ 641,120.60

Direct Cost

Direct Cost

Direct Cost Less Consortium F&A: \$ 300,000.00

Consortium F&A: \$ 0.00

Total Direct Cost: \$ 300,000.00

F&A

F&A

Add:	F&A Rate Type	F&A Rate	F&A Base	Funds Requested	Actions
1	MTDC - Federal	0.00 %	\$ 0.00		Add
	MTDC - Federal	53.50 %	\$ 37,769.50	\$ 20,206.68	Delete
Total:				\$ 20,206.68	Recalculate

Select Modular Budget Period

Budget Period: 2: 08/01/2017 - 07/31/2018

Update View



Modular Budget Overview (Period 2)

Modular Budget Overview (Period 2)

Period 2 Start Date:	08/01/2017	Period 2 Total Requested Cost:	\$ 320,913.92
Period 2 End Date:	07/31/2018	Project Total Requested Cost:	\$ 641,120.60

Direct Cost

Direct Cost

Direct Cost Less Consortium F&A: \$ 300,000.00

Consortium F&A: \$ 0.00

Total Direct Cost: \$ 300,000.00

F&A

F&A

Add:	F&A Rate Type	F&A Rate	F&A Base	Funds Requested	Actions
1	MTDC - Federal	0.00 %	\$ 0.00		Add
	MTDC - Federal	53.50 %	\$ 39,091.43	\$ 20,913.92	Delete
Total:				\$ 20,913.92	Recalculate

➤ BUDGET ACTIONS TAB

➤ In order to print a budget report, the user clicks 'Print' followed by the 'Open'. The report will appear as a PDF file.

Budget Versions

Parameters

Rates

Summary

Personnel

Non-Personnel

Distribution & Income

Modular Budget

Budget Actions

Print Forms

	Print Forms	Print Budget Comments	Actions
1	Budget Costshare Summary Report	<input type="checkbox"/>	Print
2	Budget Cumulative Report	<input type="checkbox"/>	Print
3	Budget Salary Report	<input type="checkbox"/>	Print
4	Budget Summary Report	<input type="checkbox"/>	Print
5	Budget Summary Total Report	<input type="checkbox"/>	Print
6	Budget Total Report	<input type="checkbox"/>	Print
7	Industrial Budget Report	<input type="checkbox"/>	Print
8	Industrial Cumulative Budget Report	<input type="checkbox"/>	Print

Do you want to open or save **Budget+Cumulative+Report-6395.pdf** (24.4 KB) from config-kc.njit.ekualiti.com?

[Open](#)

[Save](#)

[Cancel](#)

✕

Coeus Proposal Development - Cumulative Budget Summary

Proposal Number	530	Budget Version : 1	
Project	01 Aug 2016 - 31 Jul 2018		
Investigator	Daniel E. Bunker		
Proposal Title	Test Proposal - 6-21-16		
Comments			
	Personnel Category	Start Date	End Date
Senior Personnel			Fringe Benefits
Daniel E. Bunker	Faculty Summer Research	2016-08-01	2016-08-31
			\$0.00
			\$2,769.50
			Total Senior Personnel
			\$0.00
			\$2,769.50
Graduate Students			Fringe Benefits
Summary	Graduate Assistant Stipend	2016-08-01	2017-07-31
			\$0.00
			\$35,000.00
			Total Graduate Students
			\$0.00
			\$35,000.00
Senior Personnel			Fringe Benefits
Daniel E. Bunker	Faculty Summer Research	2017-08-01	2017-08-31
			\$0.00
			\$2,866.43
			Total Senior Personnel
			\$0.00
			\$2,866.43
Graduate Students			Fringe Benefits
Summary	Graduate Assistant Stipend	2017-08-01	2018-07-31
			\$0.00
			\$36,225.00
			Total Graduate Students
			\$0.00
			\$36,225.00
			Total Fringe Benefits
			\$0.00
			Total Salary and Wages
			\$76,860.93
TOTAL WAGES AND FRINGE BENEFITS			\$76,860.93
Equipment			
Capital Equipment >= \$5K			\$484,047.64
			Total Equipment
			\$484,047.64

- The user can enter and consolidate Budget Justification Notes that were entered in the Budget Justification Notes fields for each line item on the Personnel and Non-Personnel tabs. The user will click 'Consolidate Expense Justification'.

▼ Budget Justification

Budget Justification ⓘ

Last Updated Timestamp	Updated By	Justification Text
06/24/2016 03:35:09	bozza	<div style="border: 1px solid black; height: 150px; width: 100%;"></div>

 [Consolidate Expense Justification](#)

- The budget justification notes for all Personnel and Non-Personnel line item expenses will be listed in the text box.

Justification Text



Capital Equipment >= \$5K
Equipment expenses are justified!

Faculty Summer Research
Professor|Bunker's summer pay is justified.

Graduate Assistant Stipend
The graduate assistant's stipend is justified.

➤ The user can enter Sub award details. The user will lookup and select the Organization.

Subaward Budget

Subaward Budget ⓘ

Organization Name	Comments	Form Name	Subaward PDF File Name	Actions
Add: <input type="text" value=""/> 🔍	<input type="text"/>		<input type="text"/> Browse...	<input type="button" value="Add"/>



return value	100014	Rutgers The State University	3 Rutgers Plz, ASB-III, New Brunswick, NJ 08901-8559	NJ-006
--------------	--------	------------------------------	--	--------

➤ The user will upload the file followed by clicking 'Add'.

Organization Name	Comments	Form Name	Subaward PDF File Name	Actions
Add: <input type="text" value="100014"/> 🔍 Rutgers The State University	<input type="text"/>		<input type="text" value="C:\Users\bozza\Documer"/> Browse...	<input type="button" value="Add"/>



➤ The sub award will appear as a line item. Several action buttons will become enabled for the user to select.

1	<input type="text" value="100014"/> 🔍 Rutgers The State University	<input type="text"/>	RR_Budget_1_3	Subaward- Rutgers.pdf	<input type="button" value="Replace"/> <input type="button" value="Delete"/>	<input type="button" value="View PDF"/> <input type="button" value="View XML"/> <input type="button" value="Sync from PDF"/> <input type="button" value="Delete"/>
	<input type="button" value="Show"/>	Attachment Details				
	<input type="button" value="Show"/>	Details				

- The user can activate the validation check to see if there are any errors or incomplete information which could prevent the budget submission into routing.

▼ Data Validation

Data Validation ⓘ

You can activate a Validation check to determine any errors or incomplete information. The following Validations types will be determined:

- errors that prevent submission into routing
- warnings that serve as alerts to possible data issues but will not prevent submission into routing

 Turn On Validation

- Ekualiti will display any errors or warnings. The user will click 'Show' to display the error or warning in detail.

Validation Errors

No Validation Errors present.

Warnings

 Show Budget Rate (2)

- For this example: The warnings listed are 'Budget Rates are out of sync'. The user clicks on the fix button to be directed to the screen needing attention.

Warnings

 Hide Budget Rate (2)

Budget Rates are out of sync.  Fix

Budget Rates are out of sync.  Fix

➤ The user will be directed to the Rates tab. The user will click 'Sync All Rates' button.

Budget Versions

Parameters

Rates

Summary

Personnel

Non-Personnel

Research F & A

Fringe Benefits

Inflation

Sync All Rates

Reset All Rates

Save

Reload

Close

➤ A window will appear and the user will click 'Yes', followed by clicking 'Save'.

Do you want to sync all rate type Institute Rates & Applicable Rates with the current Institute Rates identified in the Unit Hierarchy rate table? This will override the existing rates within both columns and cause recalculation of the budget.



➤ Another window will appear and the user will click 'Yes', followed by clicking 'Save'.

Do you want to save the modified rates? Saving changes will cause the system to recalculate the budget.



- Upon clicking 'Save', the user will be redirected back to the 'Data Validation' section. There will be one validation error listed.
 - The user will click the 'Fix' button to be redirected to the screen in question.

Validation Errors

Budget Versions (1)

The budget is incomplete. Please update the status.

Hide Fix

➤ BUDGET VERSIONS TAB

- To finalize the budget, the user checks the box under 'Final', selects budget status as 'Complete' and follows by clicking 'Save'.

▼ Budget Versions (08/01/2016 - 07/31/2018)

Budget Versions ⓘ

* Name	Version #	Direct Cost	F & A	Total	Budget Status	Final	Actions
Add: <input type="text"/>							Add
Hide Budget 6-21-16	1	560,908.57	41,120.60	602,029.17	Complete	<input checked="" type="checkbox"/>	Open Copy

Residual Funds: F&A Rate Type: MTDC - Federal

Cost Sharing: 8,651.15 Last Updated: Jun 28, 2016 12:51:09 PM

Unrecovered F&A: 0.00 Last Updated By: bozza

Comments:

Save Reload Close

82

- The user will be redirected back to the Data Validations section.

➤ SUMMARY TAB

➤ The user is able to view the totals of each expense tab for all budget periods.

Summary		Period 1 08/01/2016 - 07/31/2017	Period 2 08/01/2017 - 07/31/2018	Total
Personnel Edit				
show	Salary	37,769.50	39,091.43	76,860.93
show	Fringe	0.00	0.00	0.00
show	Calculated Direct Costs	0.00	0.00	0.00
Personnel Subtotal		37,769.50	39,091.43	76,860.93
Non-Personnel Edit				
show	Equipment	242,023.82	242,023.82	484,047.64
show	Calculated Direct Costs	0.00	0.00	0.00
Non-Personnel Subtotal		242,023.82	242,023.82	484,047.64
Totals				
TOTAL DIRECT COSTS		279,793.32	281,115.25	560,908.57
TOTAL F&A COSTS		20,206.68	20,913.92	41,120.60
TOTAL COSTS		300,000.00	302,029.17	602,029.17

➤ The user is able to view the breakdown of each expense tab for each budget period.

Personnel				
show	Salary	37,769.50	39,091.43	76,860.93
Faculty Summer Research		2,769.50	2,866.43	5,635.93
Daniel E. Bunker	Principal Investigator	2,769.50	2,866.43	5,635.93
Graduate Assistant Stipend		35,000.00	36,225.00	71,225.00
Summary Line Item		35,000.00	36,225.00	71,225.00

Non-Personnel				
show	Equipment	242,023.82	242,023.82	484,047.64
Capital Equipment >= \$5K		242,023.82	242,023.82	484,047.64

➤ SPECIAL REVIEW TAB

- Special Review is used to link Proposals to Compliance Protocols (IRB/IACUC), depending on how the compliance (IRB/IACUC) questions were answered on Questions tab.
 - The user has the option to be able to start a new protocol document by clicking 'Start Protocol'.
- If protocol has been created and the number is known, the user will select the special review type, search for and select the protocol number and click 'Add'.

* Type	* Approval Status	Protocol Number
Add: Human Subjects	Active - Open to Enrollment	1604000160

Exemption #	Actions
	Add Reset Start Protocol

- The special review will be listed as a line item, along with the option to delete the line item or view the protocol. Clicking 'View Protocol' will open up the protocol.

1	Human Subjects	Active - Open to Enrollment	1604000160	Delete View Protocol
---	----------------	-----------------------------	------------	----------------------

- To verify that the protocol has been linked to the proposal, the user will refer to the Medusa tab (see slides 127-130) for further details.

View: Proposal > Award Award > Proposal Refresh

Development Proposal 530
Protocol 1604000160

PERMISSIONS

- The user can assign various roles for the key personnel. The user clicks on 'View permissions' button to view the roles, the rights and descriptions.



Rights

Roles	
Viewer	
View Proposal:	View Proposal Development Document
View Budget:	View Proposal Budget
View Narratives:	View Proposal Narrative
Print Proposal:	Print proposal on a sponsor specific path
Aggregator	
View Personnel Salaries:	View Personnel Salaries
Submit ProposalDevelopmentDocument:	Submit a Proposal for approval
Modify ProposalDevelopmentDocument:	Modify Proposal Development Document
Modify Budget:	Create/Modify Proposal Budget
Modify Narrative:	Create/Modify Proposal Narrative
Modify ProposalPermissions:	Assign Users to Proposal Roles
View Proposal:	View Proposal Development Document
View Budget:	View Proposal Budget
View Narratives:	View Proposal Narrative
Print Proposal:	Print proposal on a sponsor specific path
Certify:	Certify
Add Proposal Viewer:	Assign User to Proposal Viewer Role

➤ The user can assign a role to a key person by looking up the key personnel names.

A screenshot of a web application interface showing a table of users. The table has columns for User Name, Full Name, Unit #, Unit Name, Role, and Actions. A search icon is located in the top left corner of the table area, highlighted by a red arrow.

➤ The user will search for and select the name.

KcPerson Lookup

A screenshot of the KcPerson Lookup form. It contains several input fields: KcPerson Id, First Name, Email Address, Active (radio buttons for Yes, No, Both), Campus Code, Last Name, User Name, Office Phone, and Home Unit. A red arrow points to the Last Name field, which contains the text "haimovich". Below the form are three buttons: Search, Clear, and Cancel. A red arrow points to the Search button.

Return Value	KcPerson Id	Full Name	User Name	Email Address	Directory Department	Directory Title	Office Location	Office Phone
return value	21368449	Alexander M. Haimovich	haimovic	alexander.m.haimovich@njit.edu	251000	Dist Professor		973-596-3534

➤ The user selects the role and adds the user to the role.

➤ The user has been added as a Budget Creator for this proposal (as shown as a line item).

A screenshot of the Users table. The table has columns for Name, Full Name, Unit #, Unit Name, Role, and Actions. The first row shows Alexander M. Haimovich, 251000, Electrical and Computer Engineering. The Role dropdown menu is open, showing "select" and a downward arrow. A red arrow points to the Role dropdown menu.

A screenshot of the Users table. The table has columns for * User Name, Full Name, Unit #, Unit Name, and Role. The first row shows haimovic, Alexander M. Haimovich, 251000, Electrical and Computer Engineering, Budget Creator. A red arrow points to the Budget Creator role. The number "86" is written in the top right corner of the screenshot.

- The user can also edit (add or remove) a particular role for a person.

Full Name	Unit #	Unit Name	Role	Actions
Alexander M. Haimovich	251000	Electrical and Computer Engineering	Budget Creator	Add Edit Role Delete

- Example: The user will assign Viewer and Narrative Writer roles to the person.

Role	Assigned
Viewer	<input type="checkbox"/>
Aggregator	<input type="checkbox"/>
Budget Creator	<input checked="" type="checkbox"/>
Narrative Writer	<input type="checkbox"/>
Approver	<input type="checkbox"/>
Delete Proposal	<input type="checkbox"/>
Access Proposal Person Institutional Salaries	<input type="checkbox"/>
View Institutionally Maintained Salaries	<input type="checkbox"/>

[Save](#)

- The person will now be listed for the additional roles.

Role	Assigned User
Viewer:	Alexander M. Haimovich
Aggregator:	Thomas J. Bozza
Budget Creator:	Alexander M. Haimovich
Narrative Writer:	Alexander M. Haimovich
Approver:	
Delete Proposal:	
Access Proposal Person Institutional Salaries:	
View Institutionally Maintained Salaries:	

➤ The user can also remove key personnel from the roles and permissions.



Full Name	Unit #	Unit Name	Role	Actions
Alexander M. Haimovich	251000	Electrical and Computer Engineering	Viewer Budget Creator Narrative Writer	<input type="button" value="Add"/> <input type="button" value="Edit Role"/> <input type="button" value="Delete"/>



Are you sure you want to delete **Alexander M. Haimovich** from the list of users?

➤ The person will no longer be listed.



* User Name	Full Name	Unit #	Unit Name	Role
bozza	Thomas J. Bozza	701000	Sponsored Research Administration	Aggregator

➤ PROPOSAL SUMMARY TAB

- The user can view the Proposal Summary details.
- Note: the proposal summary sections are view-only, the user cannot enter data.

Proposal Summary

Proposal Information

Title	TJB Proposal 8-20-15	Proposal Number:	33
Principal Investigator	Mengchu Zhou	Project Start Date	07/01/2016
		Sponsor:	US NIH
Lead Unit	251000 - Electrical and Computer Engineering	Project End Date	06/30/2018
		Sponsor Deadline Date:	10/30/2015
Activity Type	Research	Include Subaward(s)?:	No
		Sponsor Deadline Type:	

Budget Totals

Total Direct Cost:	Total F&A Costs	Total Cost:	Cost Share	Underrecovery	Program Income	F&A Rate Type
\$ 100,000.00	\$ 53,500.00	\$ 153,500.00	\$ 0.00	\$ 0.00	\$ 250,000.00	MTDC - Federal

- The user can view the Budget Summary details (entered on the Budget Version tabs- see manual part 2: Budgets).

Budget Summary

Budget Periods

Period	Start Date	End Date	Direct Cost	Indirect Cost	Underrecovery	Cost Sharing	Total Cost
1	07/01/2016	06/30/2017	\$50,000.00	\$26,750.00	\$0.00	\$0.00	\$76,750.00
2	07/01/2017	06/30/2018	\$50,000.00	\$26,750.00	\$0.00	\$0.00	\$76,750.00

F & A

Rate Type	On Campus	Fiscal Year	Start Date	Institute Rate	Applicable Rate
MTDC Federal	No	2017	07/01/2016	26.00	26.00
MTDC Federal	Yes	2017	07/01/2016	53.50	53.50

Budget Reports

	Print Forms	Print Budget Comments	Action
1	Budget Costshare Summary Report	<input type="checkbox"/>	Print
2	Budget Cumulative Report	<input type="checkbox"/>	Print
3	Budget Salary Report	<input type="checkbox"/>	Print
4	Budget Summary Report	<input type="checkbox"/>	Print
5	Budget Summary Total Report	<input type="checkbox"/>	Print
6	Budget Total Report	<input type="checkbox"/>	Print
7	Industrial Budget Report	<input type="checkbox"/>	Print
8	Industrial Cumulative Budget Report	<input type="checkbox"/>	Print

- The user can select a particular budget report to print. The user will click 'Print' and a window will appear with options to Open, Save or Cancel.

Budget Summary

Show Budget Periods
 Show F & A
 Hide Budget Reports

	Print Forms	Print Budget Comments	Actions
1	Budget Costshare Summary Report	<input type="checkbox"/>	Print
2	Budget Cumulative Report	<input type="checkbox"/>	Print
3	Budget Salary Report	<input type="checkbox"/>	Print
4	Budget Summary Report	<input type="checkbox"/>	Print
5	Budget Summary Total Report	<input type="checkbox"/>	Print
6	Budget Total Report	<input type="checkbox"/>	Print
7	Industrial Budget Report	<input type="checkbox"/>	Print
8	Industrial Cumulative Budget Report	<input type="checkbox"/>	Print

- The user will click 'Open' and the budget report in PDF form will appear.

Do you want to open or save Budget+Total+Report-3640.pdf (8.65 KB) from config-kc.njit.ekualiti.com?

[Open](#) [Save](#) [Cancel](#)

Coeus Proposal - Budget Total

Proposal Number: 33 Budget Version: 1
 Proposal Title: TJB Proposal 8-20-15
 Investigator Name: Mengchu Zhou
 Period: 07/01/2016 - 06/30/2018
 Comments:

Cost Element	Description	Period 1	Period 2	Total
812008	Acad Year Release Time-Grant Match	\$0.00	\$0.00	\$0.00
71100A	Equipment - Noncapital	\$0.00	\$50,000.00	\$50,000.00
741008	Foreign Travel	\$50,000.00	\$0.00	\$50,000.00
	Employee Benefits - Full-Time Employees	\$0.00	\$0.00	\$0.00
	OH - MTDC Federal	\$26,750.00	\$26,750.00	\$53,500.00
	Total	\$76,750.00	\$76,750.00	\$153,500.00

- The user is able to include comments on the report by checking the corresponding box. The user will click 'Print' and a window will appear with options to Open, Save or Cancel.

Budget Summary

Show Budget Periods
Show F & A
Hide Budget Reports

	Print Forms	Print Budget Comments	Actions
1	Budget Costshare Summary Report	<input type="checkbox"/>	Print
2	Budget Cumulative Report	<input type="checkbox"/>	Print
3	Budget Salary Report	<input type="checkbox"/>	Print
4	Budget Summary Report	<input type="checkbox"/>	Print
5	Budget Summary Total Report	<input type="checkbox"/>	Print
6	Budget Total Report	<input checked="" type="checkbox"/>	Print
7	Industrial Budget Report	<input type="checkbox"/>	Print
8	Industrial Cumulative Budget Report	<input type="checkbox"/>	Print

- The user will click 'Open' and the budget report in PDF form will appear. The comments section will be populated.

Do you want to open or save Budget+Total+Report-3640.pdf (8.68 KB) from config-kc.njit.ekualti.com?

Open Save Cancel

Coeus Proposal - Budget Total

Proposal Number: 33 Budget Version: 1
 Proposal Title: TJB Proposal 8-20-15
 Investigator Name: Mengchu Zhou
 Period: 07/01/2016 - 06/30/2018
 Comments: comments to view for budget versions

Cost Element	Description	Period 1	Period 2	Total
812008	Acad Year Release Time-Grant Match	\$0.00	\$0.00	\$0.00
71100A	Equipment - Noncapital	\$0.00	\$50,000.00	\$50,000.00
741008	Foreign Travel	\$50,000.00	\$0.00	\$50,000.00
	Employee Benefits - Full-Time Employees	\$0.00	\$0.00	\$0.00
	OH - MTDG Federal	\$26,750.00	\$26,750.00	\$53,500.00
	Total	\$76,750.00	\$76,750.00	\$153,500.00

- The user can also view the Key Personnel section. The user will click 'View' to review the Proposal Person Certification questions.

Key Personnel (2)				
Key Personnel Information				
	Key Person	Role	Unit	Proposal Person Certification
1	Mengchu Zhou	Principal Investigator	Electrical and Computer Engineering	 View (Complete)
2	Xuan Liu	Co-Investigator	Electrical and Computer Engineering	View (Incomplete)
				Print All
Show Combined Credit Split				

Person Certification Questions (Complete)

Questions [Print](#)

Are you currently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from current transactions by any Federal Department or agency?

[More Information...](#)

No

Have you or will you lobby any Federal agency on behalf of this award? (Lobbying is defined as using Federal funds in an attempt to influence, - either in the executive or legislative branch, - a specific Federal award? The term Federal award includes grants, contracts, loans, loan guarantees, insurance and/or other assistance programs.)

[More Information...](#)

No

- The user has the option to print the person certification questions. The user will click 'Print All' and a window will appear with options to Open, Save or Cancel.

Key Personnel (2)				
Key Personnel Information				
	Key Person	Role	Unit	Proposal Person Certification
1	Mengchu Zhou	Principal Investigator	Electrical and Computer Engineering	View (Complete)
2	Xuan Liu	Co-Investigator	Electrical and Computer Engineering	View (Incomplete)
Show Combined Credit Split				Print All

- The user will click 'Open' and the Proposal Person Certification questions in PDF form will appear.



Questionnaire

Questionnaire Name: version 2 Person Certification Questions
Description: Version 2_Person Certification Questions
Module: Proposal Development **Sub Module:** Proposal Person Certification
Proposal Number: 317 **Principal Investigator:** Thomas J. Bozza
Title: QA AD
Proposal Person: Thomas J. Bozza **Person Role:** Principal Investigator

As a Principal Investigator/Co-Investigator/Key Person I certify that:

- No, I am not currently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from current transactions by any Federal Department or agency.
No
- No, I have not lobbied or will not lobby a Federal agency on behalf of this award.
No
- Yes, I agree and certify that I will abide by current University policies on cost sharing, financial conflict of interest, intellectual property, and the use of human subjects/vertebrate animals in research.
Yes
- Yes, I certify that the information contained on this form and within this application is true, accurate and complete and any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties.
Yes
- Yes, I certify that the proposal budget includes all the Cost Sharing, necessary equipment, installation, shipping, new space, renovation and/or facility modification costs.
Yes
- Yes, I accept responsibility for compliance with award terms and conditions and University policies and procedures; particularly for the technical conduct of the work, submission of technical reports, regulatory compliance, and financial management.
Yes
- No, I do not have significant financial interests.

➤ The user can also view the Combined credit split details.

▼ Key Personnel (2)

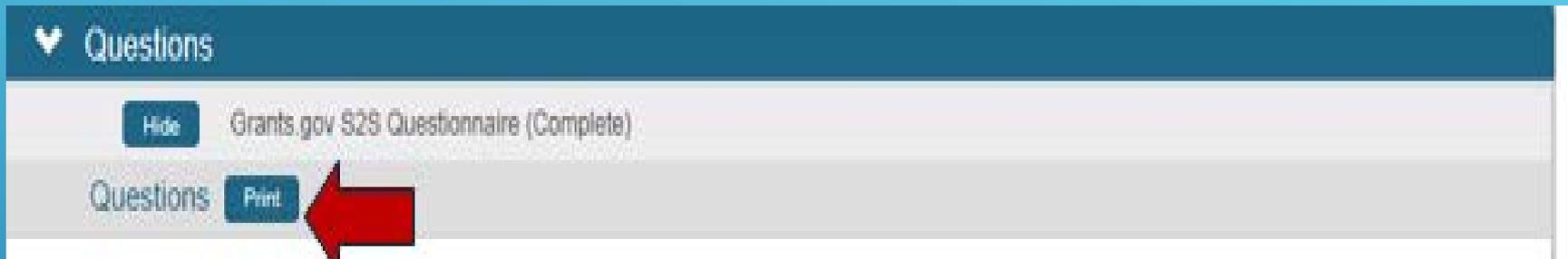
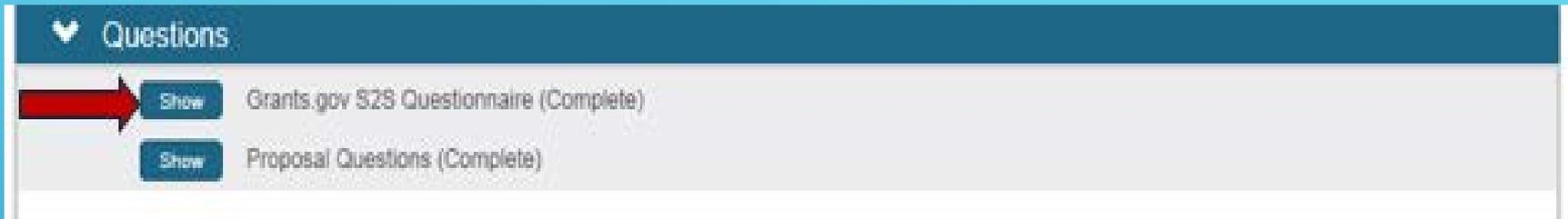
Key Personnel Information

	Key Person	Role	Unit	Proposal Person Certification
1	Mengchu Zhou	Principal Investigator	Electrical and Computer Engineering	View (Complete)
2	Xuan Liu	Co-Investigator	Electrical and Computer Engineering	View (Incomplete)
				Print All
				Show Combined Credit Split

[Hide](#) Combined Credit Split

	Space	Responsibility	Financial	Recognition	
Mengchu Zhou		50.00	50.00	50.00	50.00
251000 - Electrical and Computer Engineering		100.00	100.00	100.00	100.00
Unit Total:		100.00	100.00	100.00	100.00
Xuan Liu		50.00	50.00	50.00	50.00
251000 - Electrical and Computer Engineering		100.00	100.00	100.00	100.00
Unit Total:		100.00	100.00	100.00	100.00
Totals					
Investigator Total:		100.00	100.00	100.00	100.00

➤ The user can view the Grants.gov S2S Questionnaire, along with the option to print to a PDF file.



➤ The user can view the Proposal Questionnaire, along with the option to print to a PDF file.



➤ The user can view attachments. The user will click 'View' and a window will appear with options to Open, Save or Cancel.

Attachment Type	Description	Status	
PHS_ResearchPlan_ResearchStrategy		Complete	View
ProjectSummary		Complete	View
Narrative		Complete	View

[Show](#) Personnel Attachments (0)
[Show](#) Institutional Attachments (0)

➤ The user will click 'Open' and a PDF version of the attachment will appear.

Do you want to open or save PHS398_ResearchPlan_2_0-V2.0.pdf (171 KB) from config-kc.njit.ekualiti.com? [Open](#) [Save](#) [Cancel](#)

PHS 398 Research Plan

Please attach applicable sections of the research plan, below.

OMB Number: 0925-000

- | | | | | |
|---|----------------------|--------------------------------|-----------------------------------|---------------------------------|
| 1. Introduction to Application
(for RESUBMISSION or REVISION only) | <input type="text"/> | Add Attachment | Delete Attachment | View Attachment |
| 2. Specific Aims | <input type="text"/> | Add Attachment | Delete Attachment | View Attachment |
| 3. *Research Strategy | <input type="text"/> | Add Attachment | Delete Attachment | View Attachment |
| 4. Progress Report Publication List | <input type="text"/> | Add Attachment | Delete Attachment | View Attachment |

Human Subjects Sections

- | | | | | |
|--------------------------------------|----------------------|--------------------------------|-----------------------------------|---------------------------------|
| 5. Protection of Human Subjects | <input type="text"/> | Add Attachment | Delete Attachment | View Attachment |
| 6. Inclusion of Women and Minorities | <input type="text"/> | Add Attachment | Delete Attachment | View Attachment |
| 7. Inclusion of Children | <input type="text"/> | Add Attachment | Delete Attachment | View Attachment |

- The user can activate the validation check to check to see if any errors or incomplete information could prevent submission into routing. Streamlyne will also provide alerts to possible data issues and errors preventing submission to grants.gov.

Validations

Validations ⓘ

You can activate a Validation check to determine any errors or incomplete information. The following Validations types will be determined:

- errors that prevent submission into routing
- warnings that serve as alerts to possible data issues but will not prevent submission into routing
- errors that prevent submission to grants.gov

[Turn On Validation](#)

- The list of validation errors and warnings that need attention will appear. The descriptions for the errors will be listed which need to be fixed. The user will click on the Fix button(s), this will direct the user to the screen which will include the error(s) in question.

Validation Errors

[Hide](#) **Key Personnel Information (9)**

- The Investigators Responsibility Credit Split does not equal 100%. [Fix](#)
- The Unit Responsibility Credit Split for Bin Chen does not equal 100%. [Fix](#)
- The Unit Responsibility Credit Split for Chen Yi does not equal 100%. [Fix](#)
- The Investigators Space Credit Split does not equal 100%. [Fix](#)
- The Unit Space Credit Split for Bin Chen does not equal 100%. [Fix](#)
- The Unit Space Credit Split for Chen Yi does not equal 100%. [Fix](#)
- The Investigators Financial Credit Split does not equal 100%. [Fix](#)
- The Unit Financial Credit Split for Bin Chen does not equal 100%. [Fix](#)
- The Unit Financial Credit Split for Chen Yi does not equal 100%. [Fix](#)

[Show](#) **Budget Versions (1)**

[Show](#) **Proposal Questions (1)**

Warnings

[Show](#) **Sponsor & Program Information (1)**

- Example: the user will be directed to the Combined Credit Split section. The Validation errors will be highlighted in red. Once the errors are corrected, the user will click 'Save' button.

Combined Credit Split

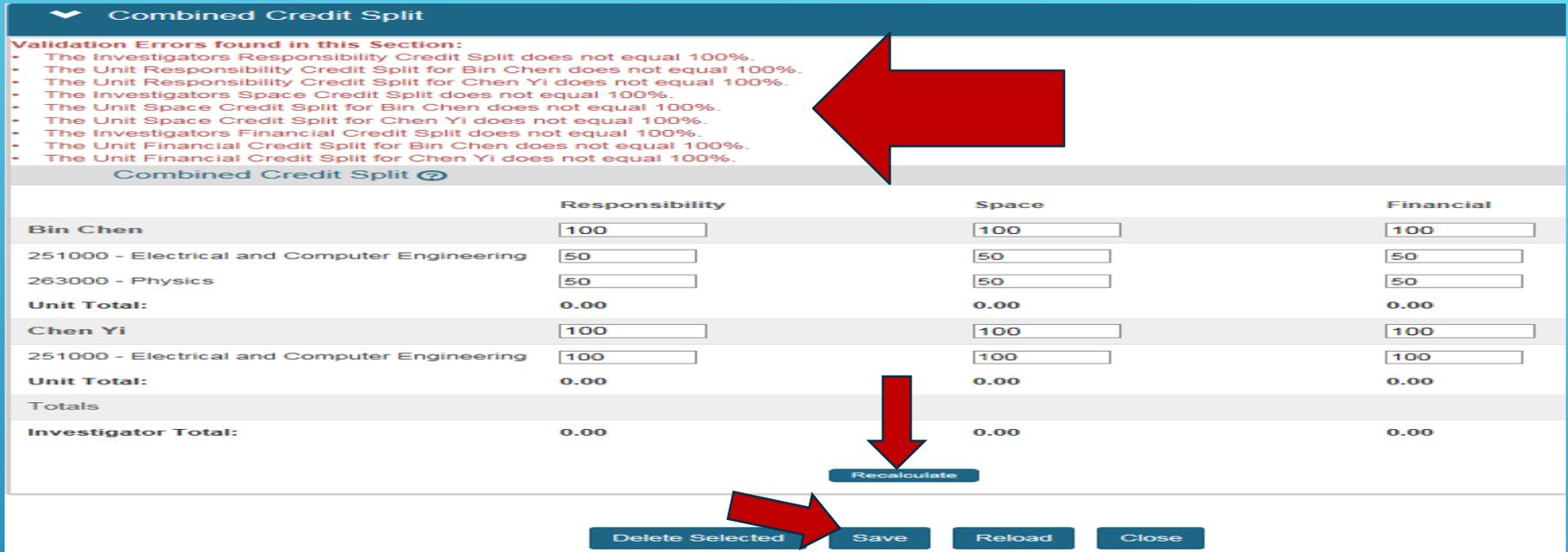
Validation Errors found in this Section:

- The Investigators Responsibility Credit Split does not equal 100%.
- The Unit Responsibility Credit Split for Bin Chen does not equal 100%.
- The Unit Responsibility Credit Split for Chen Yi does not equal 100%.
- The Investigators Space Credit Split does not equal 100%.
- The Unit Space Credit Split for Bin Chen does not equal 100%.
- The Unit Space Credit Split for Chen Yi does not equal 100%.
- The Investigators Financial Credit Split does not equal 100%.
- The Unit Financial Credit Split for Bin Chen does not equal 100%.
- The Unit Financial Credit Split for Chen Yi does not equal 100%.

	Responsibility	Space	Financial
Bin Chen	<input type="text" value="100"/>	<input type="text" value="100"/>	<input type="text" value="100"/>
251000 - Electrical and Computer Engineering	<input type="text" value="50"/>	<input type="text" value="50"/>	<input type="text" value="50"/>
263000 - Physics	<input type="text" value="50"/>	<input type="text" value="50"/>	<input type="text" value="50"/>
Unit Total:	0.00	0.00	0.00
Chen Yi	<input type="text" value="100"/>	<input type="text" value="100"/>	<input type="text" value="100"/>
251000 - Electrical and Computer Engineering	<input type="text" value="100"/>	<input type="text" value="100"/>	<input type="text" value="100"/>
Unit Total:	0.00	0.00	0.00
Totals			
Investigator Total:	0.00	0.00	0.00

Recalculate

Delete Selected Save Reload Close



- Upon clicking the 'Save' button, the user will be redirected to the Data Validation section to correct other errors/warnings.

Validation Errors

Show Budget Versions (1)

Show Proposal Questions (1)

Warnings

Show Sponsor & Program Information (1)

98



- The user can print all forms and reports pertaining to the proposal. In the example below, the user selects a grants.gov report, followed by clicking 'Print Selected'. A window will appear with options to Open, Save or Cancel.

Hide Print Sponsor Form Packages (7)

Generic Printing Forms (Coeus 4.x)	CoverPage	<input type="checkbox"/>
Generic Printing Forms (Coeus 4.x)	Budget Summary Period 1	<input checked="" type="checkbox"/>
Generic Printing Forms (Coeus 4.x)	Budget Summary Period 2	<input type="checkbox"/>
Generic Printing Forms (Coeus 4.x)	Budget Summary Period 3	<input type="checkbox"/>
Generic Printing Forms (Coeus 4.x)	Budget Summary Period 4	<input type="checkbox"/>
Generic Printing Forms (Coeus 4.x)	Budget Summary Period 5	<input type="checkbox"/>
Generic Printing Forms (Coeus 4.x)	Budget Summary Total	<input type="checkbox"/>

Select (all | none)

Print Selected

- The user will click 'Open' and a PDF version of the report will appear. .

Do you want to open or save 379_Print_Proposal_Sponsor_Forms.pdf (19.6 KB) from config-kc.njit.ekualiti.com?

Open Save ▼ Cancel X

- A PDF version of the selected report will appear.

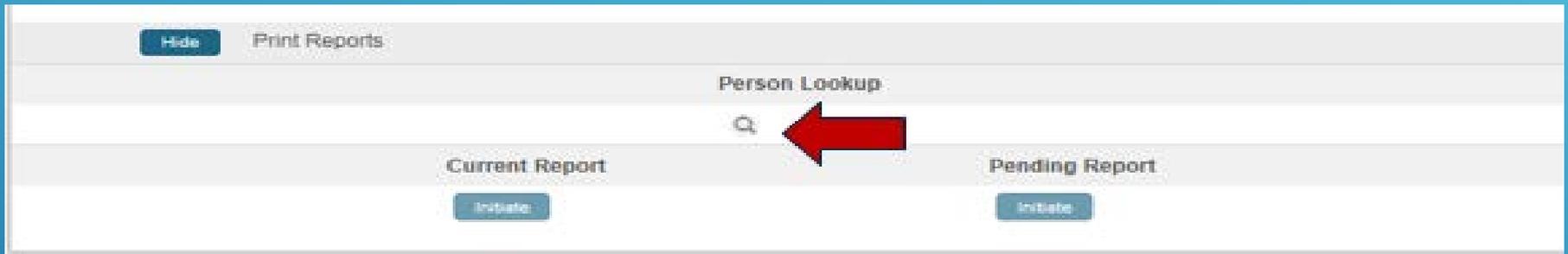
SUMMARY PROPOSAL BUDGET				FOR SPONSOR USE ONLY			
Budget Period 1							
ORGANIZATION New Jersey Institute of Technology			PROPOSAL NO.	DURATION (MONTHS)			
PRINCIPAL INVESTIGATOR/PROJECT DIRECTOR Chen, Bin			AWARD NO.	Proposed	Granted		
A. SENIOR PERSONNEL: PI/PD, Co-PIs, Faculty and Other Senior Associates List each separately with name and title. (A.7. Show number in brackets)			Sponsor-Funded Person-months				
			CAL	ACAD	SUMR	Funds Requested by Proposer	Funds Granted by Sponsor (If Different)
1.	Chen, Bin		0.00	0.00	0.00	\$0.00	
2.	Yi, Chen		0.00	0.00	0.00	\$0.00	
3.	Haimovich, Alexander		9.000000	0.00	0.00	\$229,507.64	
4.	Haimovich, Alexander		9.000000	0.00	0.00	\$229,507.64	
5.							
6.	() OTHERS (LIST INDIVIDUALLY ON BUDGET EXPLANATION PAGE)		0	0	0	\$0.00	
7.	(4) TOTAL SENIOR PERSONNEL (1-6)		18	0	0	\$459,015.28	
B. OTHER PERSONNEL (SHOW NUMBERS IN BRACKETS)							
1.	(0) POSTDOCTORAL					\$0.00	
2.	(0) OTHER PROFESSIONS (TECHNICIAN, PROGRAMMER, ETC.)					\$0.00	
3.	(0) GRADUATE STUDENTS					\$0.00	
4.	(0) UNDERGRADUATE STUDENTS					\$0.00	
5.	(0) SECRETARIAL - CLERICAL (IF CHARGED DIRECTLY)					\$0.00	

PROPOSAL ACTIONS

- The user can also print select reports associated with proposals.



- The user will look up the key person in which the reports pertain to.



- The user will search for and select the person.

The screenshot shows the 'KcPerson Lookup' form. It has several input fields: 'KcPerson Id', 'First Name', 'Email Address', 'Active' (radio buttons for Yes, No, Both), 'Campus Code', 'Last Name' (containing 'zhou'), 'User Name', 'Office Phone', and 'Home Unit'. There are 'Search', 'Clear', and 'Cancel' buttons. A red arrow points to the 'Last Name' field. Below the form is a table with the following data:

Return Value	KcPerson Id	Full Name	User Name	Email Address	Directory Department	Directory Title	Office Location
return value	31083198	Chanhua Zhou	cz88	cz88@njit.edu	270000	GA/TA Grad Division Stipend	
return value	21461135	Qiyi Zhou	qz25	qz25@njit.edu	262000	GA/TA Stipend (Dept Support)	
return value	21374668	Tao Zhou	taozhou	taozhou@njit.edu	263000	Associate Professor	
return value	21484801	Xuecong Zhou	xzhou	xuecong.zhou@njit.edu	263000	Laboratory Coordinator	
return value	21367479	Mengchu Zhou	zhou	mengchu.zhou@njit.edu	251000	Distinguished Professor	

- The key person will be listed. The user will click the 'Initiate' button to view the list of agencies/reports associated with proposals for a particular person.

Hide Print Reports

Person Lookup
Mengchu Zhou Q

Current Report Pending Report

Initiate Print Initiate Print

- The user will view the list of agencies/reports associated with proposals for a particular person.

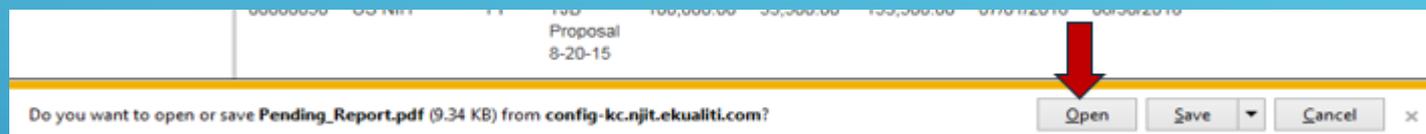
Pending Support - Mengchu Zhou

Proposal Number	Agency	Role	Title	Total Direct Cost	Total F&A Cost	Total Requested Cost	Effective Date	End Date	% Effort	Academic Year Effort %	Summer Year Effort %	Calendar Year Effort %
00000005	New Jersey Meadowlands Commission	PI	Config test	0.00	0.00	0.00		06/30/2019				
00000011	US NIH	KP	August 13 Workflow	0.00	0.00	0.00		06/30/2019				
00000050	US NIH	PI	TJB Proposal 8-20-15	100,000.00	53,500.00	153,500.00	07/01/2016	06/30/2018				

- The user can print the list of reports associated with proposals for a particular person. A window will appear with options to Open, Save or Cancel.



- The user will click 'Open' and a PDF version of the report will appear.



Pending Support for Mengchu Zhou

Proposal Number	Agency	Role	Title	Total Direct Cost	Total FBA Cost	Total Requested Cost	Effective Date	End Date	Effort %	Academic Year Effort %	Summer Year Effort %	Calendar Year Effort %
0000005	New Jersey Medicaid Commission	PI	Config test	\$0.00	\$0.00	\$0.00		06/30/2019				
0000011	US NH	IP	Agout 13 Workshop	\$0.00	\$0.00	\$0.00		06/30/2019				
0000005	US NH	PI	TDR Proposal 8-20-15	\$100,000.00	\$51,500.00	\$151,500.00	07/01/2014	06/30/2019				

- If/When a submission to a Grants.gov sponsor is incomplete or needs to be corrected, the aggregator will be notified via email.
- The aggregator will then mark a check next to 'Budget' (select all versions or final version), mark a check next to Attachments (if any), select the lead unit and mark a check next to Questionnaire, followed by the clicking 'Copy Proposal' button.

Copy to New Document

Copy to New Document ⓘ

Proposal: yes

Lead Unit: 251000

Budget? : all versions

Attachments? :

Lead Unit : 251000 - Electrical and Computer Engineering

Questionnaires? :

Copy Proposal

- The new document will appear. At the top of the screen, the new document number (6306) will be displayed as well as the original document number (6266). The aggregator will then make the necessary corrections prior to re-starting the workflow process.

Proposal Development Document ⓘ

Document Number : 6306
Initiator Network Id : bozza

Document Status : In Progress
Creation Timestamp : 12:18 PM 05/20/2016
Copied from Document Header Id : 6266

- The user is able to make minor changes to a proposal document that has already been submitted into workflow.

Proposal Data Override

Proposal Data Override ⓘ

Field To Edit : Sponsor Deadline Date

Old Display Value : 06/15/2016

Display Value : 06/15/2016

Changed Value : 06/20/2016

Comments :

Edit

➤ Continuing with this example, the user is directed to the notification editor screen. The user can add a recipient.

Notification Editor

Notification Recipients

Add: Role Search Employee Search Non-Employee Search Add

1 KC-PD:Aggregator Delete

Notification Message

Subject: 263000 - Notification

Message: Sponsor Deadline Date for proposal 511 has been changed to 06/20/2016

Include Document Link

➤ The user searches for and selects the name of recipient.

KcPerson Lookup

KcPerson Id: [] Last Name: bozza

First Name: [] User Name: []

Email Address: [] Office Phone: []

Active: Yes No Both

Home Unit: []

Campus Code: []

Search Clear Cancel

Return Value	KcPerson Id	Full Name	User Name	Email Address	Directory Department	Directory Title	Office Location	Office Phone	School
return value	31386348	Thomas J. Bozza	bozza	srard@njit.edu	701000	Grants Specialist		973-596-3000	

➤ The recipient's name will appear as a line item.

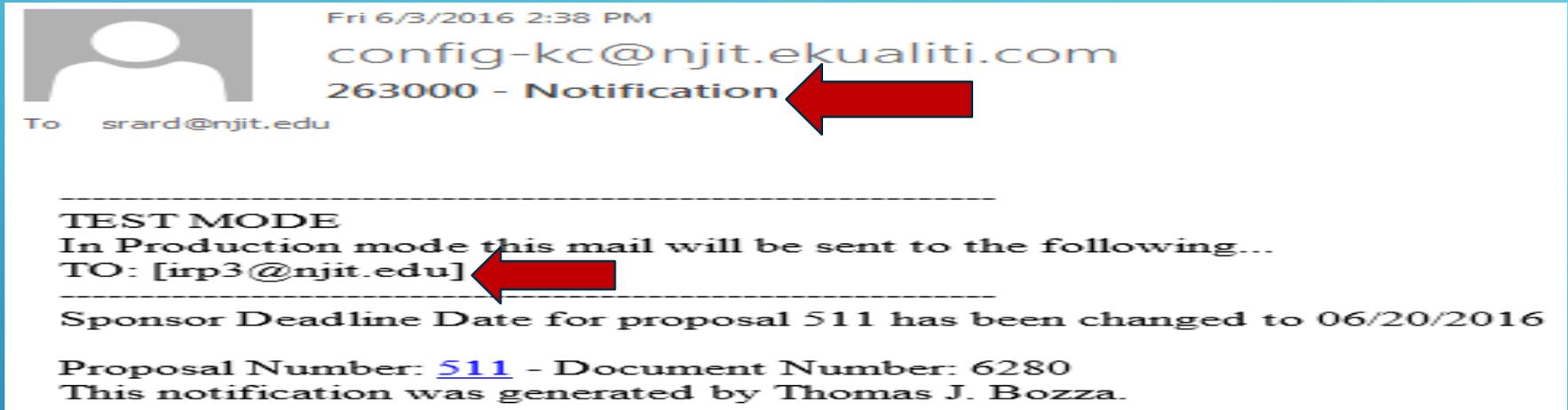
Thomas J. Bozza

KC-PD:Aggregator Delete

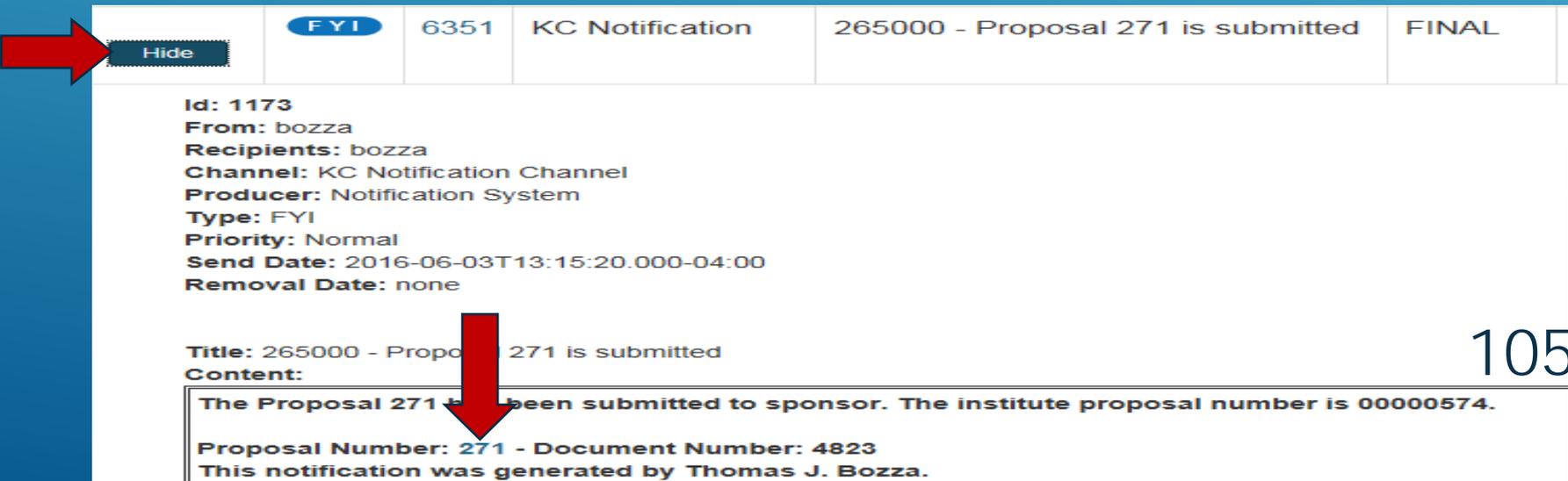
➤ If/when the subject and/or message are modified, the user will click 'Send'.



➤ The recipient will receive the notification via email.



➤ The recipient will also receive an FYI notification in the action list. The user can click on the proposal number link to be directed right to the proposal in question.



- The 1st subsection of Route Log pertains to the document ID in question and will include the audit trail details and the status of the proposal document.

Route Log refresh

Route Log

▼ ID: 6306

Title	NIH Test Proposal 5; Proposal No: 519; PI: Alexander M. Haimovich; Sponsor: US NIH; Due Date: 06/03/2016		
Type	Proposal Development Document	Created	12:18 PM 05/20/2016
Initiator	Bozza, Thomas J.	Last Modified	03:12 PM 06/03/2016
Route Status	SAVED	Last Approved	
Document Status		Document Status Modified	
Node(s)	Initiated	Finalized	

- The Actions Taken subsection will display all actions taken thus. In this example, the only action listed is 'SAVED', and taken by the initiator of the proposal.

▼ Actions Taken

Action	Taken By	For Delegator	Time/Date	Annotation
SAVED	Bozza, Thomas J.		12:18 PM 05/20/2016	

- The Pending Action Requests subsection will list the next person in the route log chain to take action. In this example, the initiator will be submitting the proposal document into workflow.

▼ Pending Action Requests

Action	Requested Of	Time/Date	Annotation
show IN ACTION LIST COMPLETE	Bozza, Thomas J.	12:18 PM 05/20/2016	

- The Future Action Requests subsection will list the chain of approvers following the pending action request. The user can click on Unit Approver Type link to view the approver names and their alternates for a certain level of approval.

Future Action Requests

Action	Requested Of	Time/Date	Annotation
show PENDING APPROVE	Haimovich, Alexander M.	03:31 PM 06/03/2016	KC-WKFLW PI
show PENDING APPROVE	Unit Approver Type NCEChiefECE Unit Number 251000	03:31 PM 06/03/2016	KC-WKFLW Unit Approver 1 Derived Role
show PENDING APPROVE	Unit Approver Type Chair ECE Unit Number 251000	03:31 PM 06/03/2016	KC-WKFLW Unit Approver 2 Derived Role
show PENDING APPROVE	Unit Approver Type Dean ECE Unit Number DIV25	03:31 PM 06/03/2016	KC-WKFLW Unit Approver 3 Derived Role
show PENDING APPROVE	Unit Approver Type SRA Unit Number 000001	03:31 PM 06/03/2016	KC-WKFLW Unit Approver 4 Derived Role

- In this example, the members of Sponsored Research Administration will be listed. Each name listed has the authority to provide the final line of approval for proposals on behalf of Sponsored Research.

Overview

Group Id : 10059
 Group Namespace : KC-WKFLW - KC Workflow Infrastructure
 Active? : Yes

Type Name : Default
 Group Name : Unit Approver Type SRA Unit Number 000001
 Group Description : Sponsored Research Administration

Assignees

Viewing rows 1 to 8

Members:

	* Type Code	* Member Identifier	Namespace	Name	Full Name	Active From Dt	Active To Dt
1	Principal	31386348		bozza	Thomas Bozza		
2	Principal	21484184		failla	Marilyn Failla		
3	Principal	31168160		gadhia	Mukeshkumar Gadhia		
4	Principal	21837573		irp3	Iris Pantoja		
5	Principal	21470500		margolie	Felicia Margolies		
6	Principal	31382999		pettit	Matthew Pettit		
7	Principal	21470615		rfederic	Rose Federici		
8	Principal	21236506		rubio	Norma Rubio		

- The next several slides outline the Proposal Document approval process.
 - The initiator will submit the proposal into workflow.

Pending Action Requests

Action	Requested Of	Time/Date	Annotation
show  IN ACTION LIST COMPLETE	Bozza, Thomas J.	02:35 PM 02/03/2016	

Local Recipients

[Save XML](#) [Delete Proposal](#) [Send Notification](#) [Submit](#) [Save](#) [Reload](#) [Close](#) [Cancel](#)

- Upon clicking 'Submit', the user is asked whether he/she wishes to receive future approval requests.

Your name appears more than once in the routing path, which gives you the option to approve this document again. Do you wish to receive future approval requests? NOTE: Answering 'No' here will complete all your approvals simultaneously.

 [Yes](#) [No](#)

- Upon clicking 'Yes' or 'No', Streamlyne will display the following success message (the proposal has been submitted into workflow).

• Document was successfully submitted. [x](#)

- Once submitted into workflow, the initiator and the next person to approve will receive email notifications.
(Example: the PI is the next people to approve)

Mon 6/6/2016 12:23 PM
 config-rice@njit.ekualiti.com
 Action List Reminder

To: srard@njit.edu

Your Action List has an eDoc(electronic document) that needs your attention:

Document ID: 5121
 Initiator: Bozza, Thomas J.
 Type: Add/Modify ProposalDevelopmentDocument
 Title: ECE Proposal 2-3-16; Proposal No: 327; PI: Alexander M. Haimovich; Sponsor: US NIH; Due Date: 02/15/2016

To respond to this eDoc:
 Go to <https://config-kc.njit.ekualiti.com/proposalDevelopmentProposal.do?methodToCall=docHandler&docId=5121&command=displayActionListView>
 Or you may access the eDoc from your Action List:
 Go to <https://config-rice.njit.ekualiti.com/kew/ActionList.do>, and then click on the numeric Document ID: 5121 in the first column of the List.

To change how these email notifications are sent(daily, weekly or none):
 Go to <https://config-rice.njit.ekualiti.com/kew/Preferences.do>

For additional help, email <<mailto:config-rice@njit.ekualiti.com>>

Action Item sent to haimovic

- The PI's action list will list the document ID in question to be approved. The 'APP' icon indicates that approval action is being requested.

Rice Home KC Home Currently signed in as haimovic

		Document	National Institutes of Health, Due Date:				
			02/15/2016				
Show	APP	5121	Proposal Development Document	ECE Proposal 2-3-16; Proposal No: 327; PI: Alexander M. Haimovich; Sponsor: US NIH; Due Date: 02/15/2016	ENROUTE	02:32 PM 02/03/2016	

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- The Pending Action Request subsection will list the next person to approve, which will be the PI. The PI will click the 'Approve' button.

Action	Requested Of	Time/Date	Annotation
IN ACTION LIST APPROVE	Haimovich, Alexander M.	12:23 PM 06/06/2016	KC-WKFLW PI

Buttons: Reject, Send Notification, Send AdHoc, Approve, Disapprove, Close

- Assuming there are no errors, each time a document is approved, there will be a message on the approver's screen stating that the 'document was successfully approved'.

Informational messages in this Section:
• Document was successfully approved.

- For this example, the next person to approve will be the Division Chief (for the respective college of the PI).
- The Division Chief will receive an email notification that he/she needs to approve.

Mon 6/6/2016 12:32 PM
config-rice@njit.ekualiti.com
Action List Reminder

To: srard@njit.edu

Your Action List has an eDoc(electronic document) that needs your attention:

Document ID: 5121
Initiator: Bozza, Thomas J.
Type: Add/Modify ProposalDevelopmentDocument
Title: ECE Proposal 2-3-16; Proposal No: 327; PI: Alexander M. Haimovich; Sponsor: US NIH; Due Date: 02/15/2016

To respond to this eDoc:
Go to <https://config-kc.njit.ekualiti.com/proposalDevelopmentProposal.do?methodToCall=docHandler&docid=5121&command=displayActionListView>

Or you may access the eDoc from your Action List:
Go to <https://config-rice.njit.ekualiti.com/kew/ActionList.do>, and then click on the numeric Document ID: 5121 in the first column of the List.

To change how these email notifications are sent(daily, weekly or none):
Go to <https://config-rice.njit.ekualiti.com/kew/Preferences.do>

For additional help, email <<mailto:config-rice@njit.ekualiti.com>>

Action Item sent to jmccarth

➤ The Division Chief's action list will list the document ID in question to be approved. The 'APP' icon indicates that approval action is being requested.

Rice Home	KC Home	Currently signed in as jmccarth						
Show	APP	5121	Proposal Development Document	ECE Proposal 2-3-16; Proposal No: 327; PI: Alexander M. Haimovich; Sponsor: US NIH; Due Date: 02/15/2016	ENROUTE	02:32 PM 02/03/2016	Unit Approver Type NCEChiefECE Unit Number 251000	

➤ The Division Chief will click the 'Approve' button.

Pending Action Requests

Action	Requested Of	Time/Date	Annotation
show IN ACTION LIST APPROVE	Unit Approver Type NCEChiefECE Unit Number 251000	12:31 PM 06/06/2016	KC-WKFLW Unit Approver 1 Derived Role

Buttons: [Reject](#) [Send Notification](#) [Send AdHoc](#) [Approve](#) [Disapprove](#) [Close](#)

➤ For this example, the next person to approve will be the department Chair (for the respective department of the PI). The Chair will receive an email notification that he/she needs to approve.

Mon 6/6/2016 3:13 PM
config-rice@njit.ekualiti.com
 Action List Reminder

To: srard@njit.edu

Your Action List has an eDoc(electronic document) that needs your attention:

Document ID: 5121
 Initiator: [Bozza, Thomas J.](#)
 Type: Add/Modify ProposalDevelopmentDocument
 Title: ECE Proposal 2-3-16; Proposal No: 327; PI: Alexander M. Haimovich; Sponsor: US NIH; Due Date: 02/15/2016

To respond to this eDoc:
 Go to <https://config-kc.njit.ekualiti.com/proposalDevelopmentProposal.do?methodToCall=docHandler&docid=5121&command=displayActionListView>

Or you may access the eDoc from your Action List:
 Go to <https://config-rice.njit.ekualiti.com/kew/ActionList.do>, and then click on the numeric Document ID: 5121 in the first column of the List.

To change how these email notifications are sent(daily, weekly or none):
 Go to <https://config-rice.njit.ekualiti.com/kew/Preferences.do>

For additional help, email config-rice@njit.ekualiti.com

Action Item sent to tsybesko

➤ The Chair's action list will list the document ID to be approved. The 'APP' icon indicates that approval action is being requested.

Action List 

Refresh  Filter

Apply Default
NONE 

	Action	Id	Type	Title	Route Status	Delegator	Date Created	Group Request	Actions	Log
	 	 	Proposal Development Document	ECE Proposal 2-3-16; Proposal No: 327; PI: Alexander M. Haimovich; Sponsor: US NIH; Due Date: 02/15/2016	ENROUTE		02:32 PM 02/03/2016	Unit Approver Type ChairECE Unit Number 251000		

➤ The Chair will click the 'Approve' button.

 Pending Action Requests

Action	Requested Of	Time/Date	Annotation
 IN ACTION LIST APPROVE	Unit Approver Type ChairECE Unit Number 251000	03:12 PM 06/06/2016	KC-WKFLW Unit Approver 2 Derived Role



 Future Action Requests

loc Recipients

Reject
Send Notification
Send AdHoc
 Approve
Disapprove
Close

➤ For this example, the next person to approve will be the Dean (for the respective college of the PI). The Dean will receive an email notification that he/she needs to approve.


 Mon 6/6/2016 3:33 PM
 config-rice@njit.ekualiti.com
Action List Reminder

To: srard@njit.edu

Your Action List has an eDoc(electronic document) that needs your attention:

Document ID: 5121
Initiator: Bozza, Thomas J.
Type: Add/Modify ProposalDevelopmentDocument
Title: ECE Proposal 2-3-16; Proposal No: 327; PI: Alexander M. Haimovich; Sponsor: US NIH; Due Date: 02/15/2016

To respond to this eDoc:
 Go to <https://config-kc.njit.ekualiti.com/proposalDevelopmentProposal.do?methodToCall=docHandler&docId=5121&command=displayActionListView>
 Or you may access the eDoc from your Action List:
 Go to <https://config-rice.njit.ekualiti.com/kew/ActionList.do>, and then click on the numeric Document ID: 5121 in the first column of the List.

To change how these email notifications are sent(daily, weekly or none):
 Go to <https://config-rice.njit.ekualiti.com/kew/Preferences.do>

For additional help, email <<mailto:config-rice@njit.ekualiti.com>>

Action Item sent to kam

➤ The Dean's action list will list the document ID to be approved. The 'APP' icon indicates that approval action is being requested.

Rice Home KC Home Documentation Helpdesk								Currently signed in as kam	
			Development Document	Proposal No: 110; PI: John P. McCarthy; Sponsor: National Science Foundation; Due Date: 10/30/2015			10/26/2015		
Show	APP	4725	Proposal Development Document	Data Val Proposal 1; Proposal No: 245; PI: Norman Loney; Sponsor: US Dept. Of The Army; Due Date: 12/31/2015	ENROUTE		04:14 PM 12/17/2015	Unit Approver Type DeanNCE Unit Number DIV25	
Show	APP	5121	Proposal Development Document	ECE Proposal 2-3-16; Proposal No: 327; PI: Alexander M. Haimovich; Sponsor: US NIH; Due Date: 02/15/2016	ENROUTE		02:32 PM 02/03/2016	Unit Approver Type DeanNCE Unit Number DIV25	113

➤ The Dean will click the 'Approve' button.

▼ Pending Action Requests

Action	Requested Of	Time/Date	Annotation
 IN ACTION LIST APPROVE	Unit Approver Type DeanNCE Unit Number DIV25	03:33 PM 06/06/2016	KC-WKFLW Unit Approver 3 Derived Role

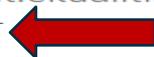
➤ Future Action Requests



Ad Hoc Recipients

- Reject
- Send Notification
- Send AdHoc
- Approve
- Disapprove
- Close

➤ For this example, the next and final line of approval will be Sponsored Research Administration. All members of Sponsored Research Administration will receive email notifications to approve. Note: Only 1 person from SRA can approve on behalf of SRA.

Mon 6/6/2016 3:49 PM
config-rice@njit.ekualiti.com
Action List Reminder 
To: srard@njit.edu

Your Action List has an eDoc (electronic document) that needs your attention:

Document ID: 5121 
Initiator: Bozza, Thomas J.
Type: Add/Modify ProposalDevelopmentDocument
Title: ECE Proposal 2-3-16; Proposal No: 327; PI: Alexander M. Haimovich; Sponsor: US NIH; Due Date: 02/15/2016

To respond to this eDoc:

Go to <https://config-kc.njit.ekualiti.com/proposalDevelopmentProposal.do?methodToCall=docHandler&docId=5121&command=displayActionListView>

Or you may access the eDoc from your Action List:

Go to <https://config-rice.njit.ekualiti.com/kew/ActionList.do>, and then click on the numeric Document ID: 5121 in the first column of the List.

To change how these email notifications are sent (daily, weekly or none):

Go to <https://config-rice.njit.ekualiti.com/kew/Preferences.do>

For additional help, email <<mailto:config-rice@njit.ekualiti.com>>

Action Item sent to bozza 

➤ The SRA Member's action list will list the document ID to be approved. The 'APP' icon indicates that approval action is being requested.

Rice Home		KC Home		Currently signed in as bozza						
Show	APP	4935	Proposal Development Document	TEST - Observations; Proposal No: 286; PI: Wenda Cao; Sponsor: US Dept. Of Air Force; Due Date: 02/01/2016	ENROUTE		02:28 PM 01/11/2016	Unit Approver Type SRA Unit Number 000001		
Show	COM	5081	Proposal Development Document	QA AD; Proposal No: 317; PI: Thomas J. Bozza; Sponsor: US NIH; Due Date: 05/25/2016	SAVED		07:34 PM 01/28/2016			
Show	APP	5121	Proposal Development Document	ECE Proposal 2-3-16; Proposal No: 327; PI: Alexander M. Haimovich; Sponsor: US NIH; Due Date: 02/15/2016	ENROUTE		02:32 PM 02/03/2016	Unit Approver Type SRA Unit Number 000001		

➤ The SRA Member will click the 'Approve' button.

▼ Pending Action Requests

Action	Requested Of	Time/Date	Annotation
IN ACTION LIST APPROVE	Unit Approver Type SRA Unit Number 000001	03:49 PM 06/06/2016	KC-WKFLW Unit Approver 4 Derived Role

Submit To Sponsor
Submit To S2S
Reject
Send Notification
Send AdHoc
Blanket Approve
 Approve
Disapprove

Close
Recall

➤ Once the SRA member clicks the 'Approve' button, a message will state 'Document was successfully approved' and 'Institutional Proposal (number ID) has been generated'.

- Institutional Proposal 00000580 has been generated. ✕

➤ Also upon SRA Approval, the Notification Editor screen will appear. The user will have the ability to send a notification to the Aggregator (initiator) of the proposal. The user can add recipients, edit the message and send to the recipient(s).

Notification Editor

Notification Recipients

Add:

Role Search

Employee Search

Non-Employee Search

1 KC-PD:Aggregator

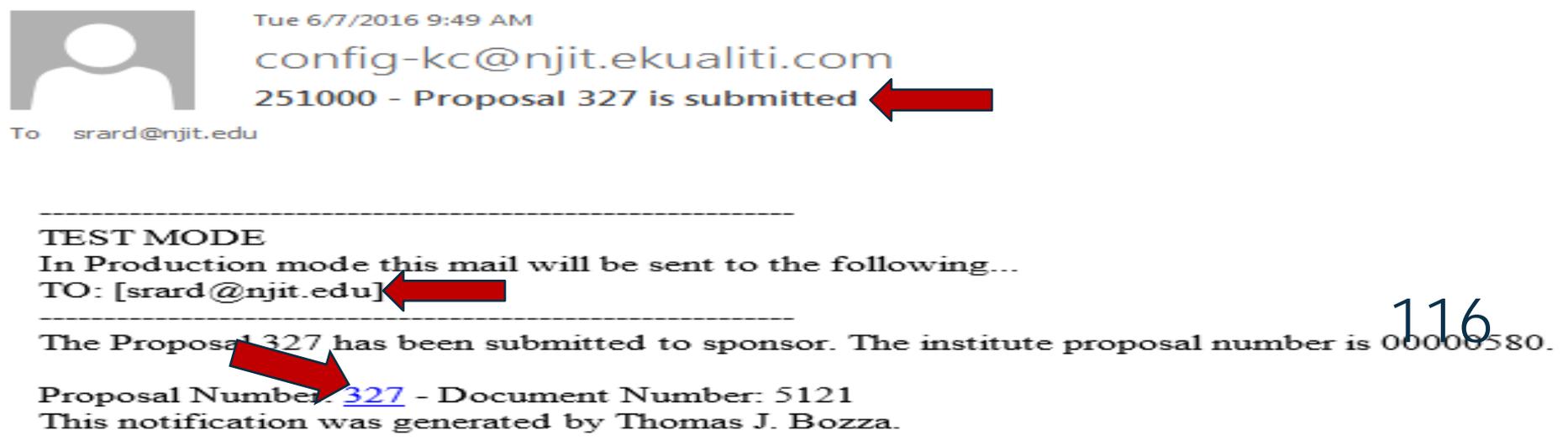
Notification Message

Subject: 251000 - Proposal 327 is submitted

Message: The Proposal 327 has been submitted to sponsor. The institute proposal number is 0000580.

Include Document Link

➤ An email will be sent to the initiator of the proposal notifying him/her that the proposal has been submitted. The recipient will be able to click on the Proposal Number link to access the proposal in question.



➤ The initiator will also receive a notification on his/her action list regarding the submitted proposal.

Rice Home	KC Home	Currently signed in as bozza ▾						
Show	FYI	6373	KC Notification	251000 - Proposal 327 is submitted	FINAL	09:49 AM 06/07/2016	NO ▾	

➤ (If a grants.gov sponsor) Once the proposal is approved by the entire routing chain, a member of Sponsored Research Administration will submit the proposal to Grants.gov.

Proposal Actions > Route Log

Medusa

Submit To S2S Send Notification Close

➤ After the user submits to grants.gov, Streamlyne will display the submission details. To verify that the submission has been validated, the user will click 'Refresh' button.

S2S Opportunity Search www.grants.gov Grants.gov Forms Directory

S2S Lookup

Show Opportunity
Hide Submission Details

Received Date : 6/7/16 10:00 AM Last Modified Date :

Status : Submitted to S2S

S2S Tracking Id : GRANT00639977

Agency Tracking Id :

Comments : Trying to submit to S2S

Attachments :

- N-1_PHS_ResearchPlan_ResearchStrategy-PHS398_ResearchPlan_2_0-V2.0
- N-2_Narrative-RR_OtherProjectInfo_1_3-V1.3
- N-3_ProjectSummary-RR_OtherProjectInfo_1_3-V1.3
- N-2_Narrative-RR_OtherProjectInfo_1_3-V1.3
- N-3_ProjectSummary-RR_OtherProjectInfo_1_3-V1.3

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Refresh

➤ Upon clicking 'Refresh', Streamlyne will display the updated submission details: status, the S2S tracking ID, Comments and time stamp of submission.

Submission Details

Received Date : 6/7/16 10:00 AM ← Last Modified Date : 6/7/16 10:03 AM →

Status : RECEIVED_BY_AGENCY →

S2S Tracking Id : GRANT00639977

Agency Tracking Id :

Comments : RECEIVED_BY_AGENCY →

➤ The user is also able to voluntarily send notifications to other users with information/details pertaining to the proposal document in question. Common reasons include missing attachments required prior to submission to sponsor. The user clicks Send Notification button.

Reject Send Notification Send Ad-hoc Approve Disapprove Close

➤ The user will search, select and add the recipient, subject and message in the text box. 'Include Document Link' will be checked by default (the user will be able to access the document from the notification). The user will click 'Send' button.

Notification Editor

Notification Recipients

Add: Role Search Employee Search Non-Employee Search Add

1 Matthew L. Pettit Delete

Notification Message

Subject Missing Budget Justification

Message Please attach as budget justification as it is required for submission to grants.gov.

Include Document Link

Send Cancel

➤ The recipient will receive the notification via email. Continuing with this example, the recipient (Matthew Pettit) is part of the email group 'srard@njit.edu'. The user will also be able to access the proposal document by clicking on the proposal number link (in blue).

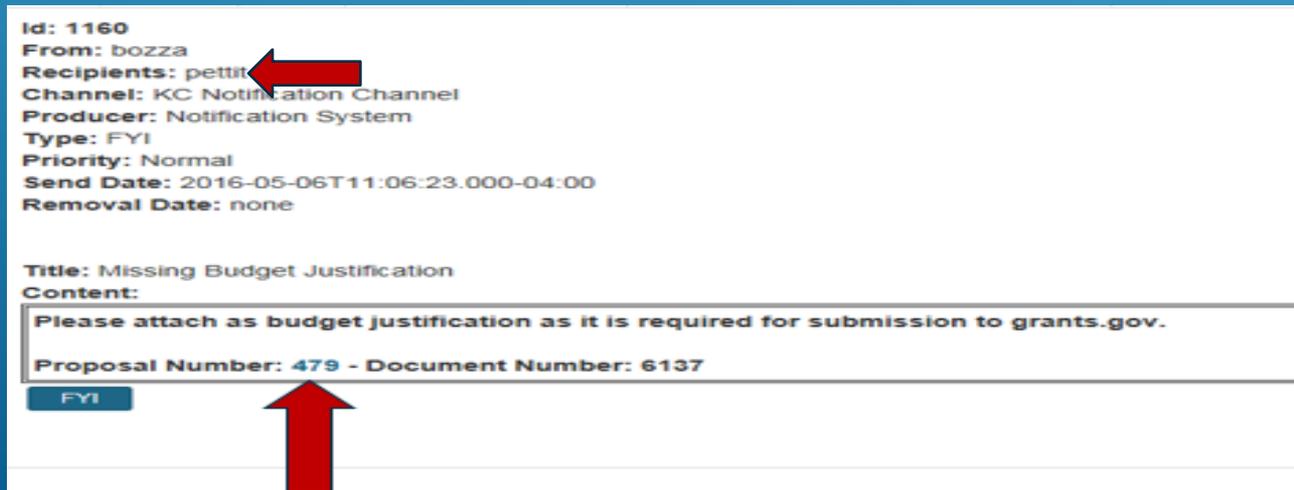


➤ The recipient will receive an FYI notification on his action list. The title of the notification will be the same as the subject entered previously. The recipient will click 'Show' to expand the details of the FYI.

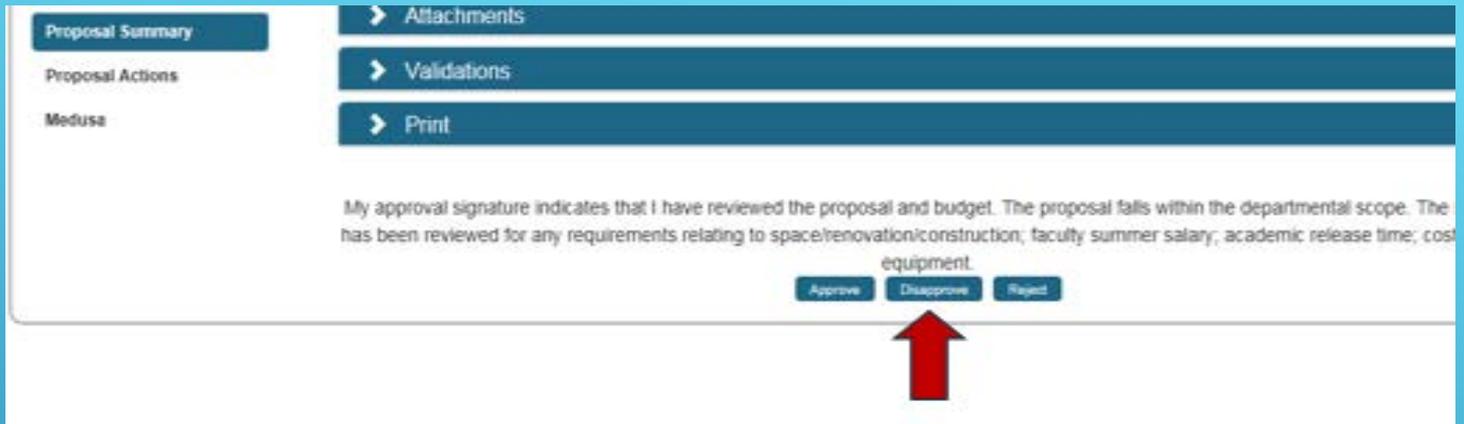
Rice Home KC Home Currently signed in as: pettit ▾

Action	Id	Type	Title	Status	Delegator	Created	Request	Actions	Log
FYI	6191	KC Notification	Missing Budget Justification			11:06 AM 05/06/2016		NO ▾	

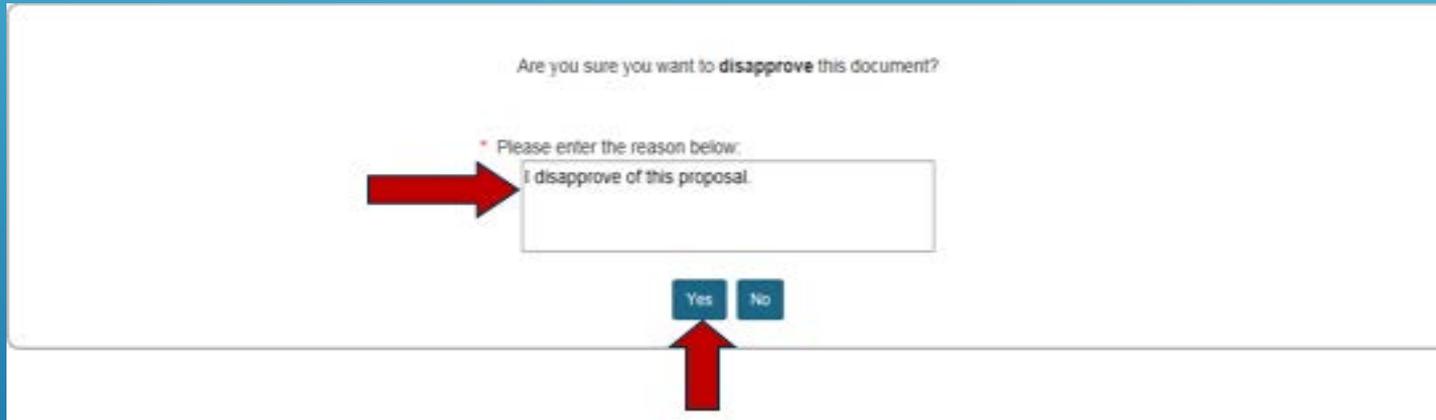
➤ The recipient can also access the proposal document from the proposal number link (in blue).



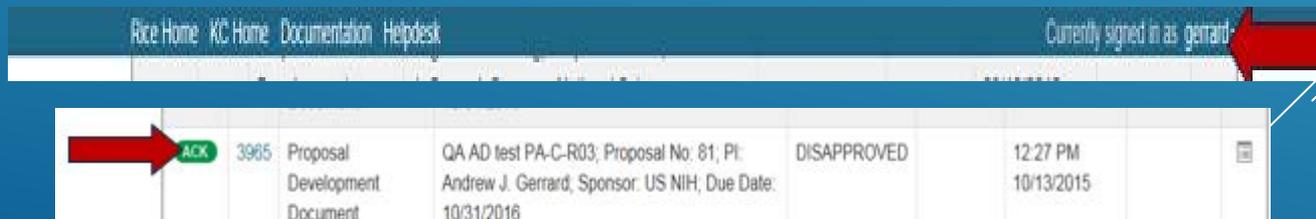
➤ The pending approver has the ability to disapprove the proposal document.



➤ The pending approver enters a reason for disapproval and clicks 'Yes'.



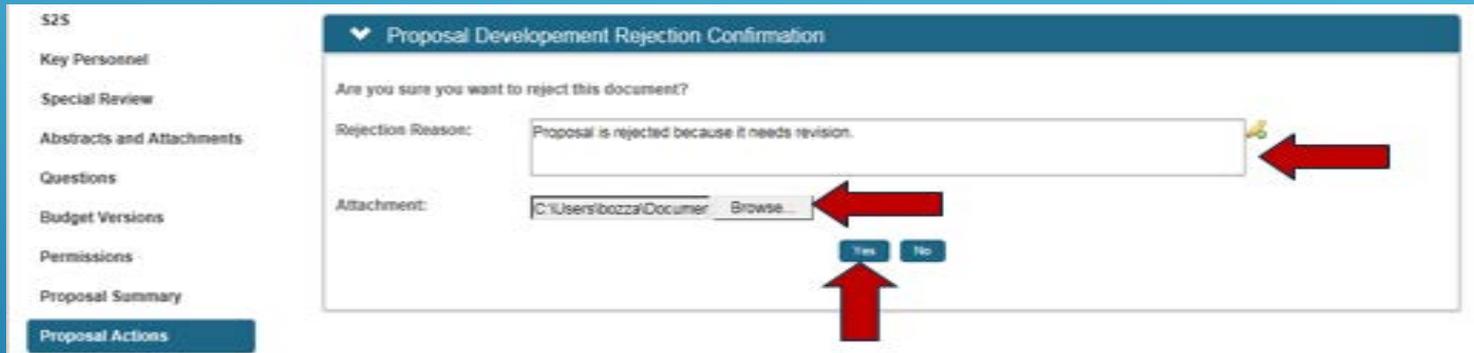
➤ The disapproved document will appear in the initiator's action list. The ACK icon indicates the document is pending acknowledgement by the initiator.



➤ The pending approver has the ability to reject the proposal document. This will allow the approver to return a proposal for revision. (Note: this can be done on either the Proposal Summary or Proposal Actions tab).



➤ The pending approver enters a reason for the reject. Also, an attachment can be added.



➤ The attachment will appear on the Abstract & Attachment tab.



➤ After the proposal was rejected, the proposal will appear in the initiator's action list.

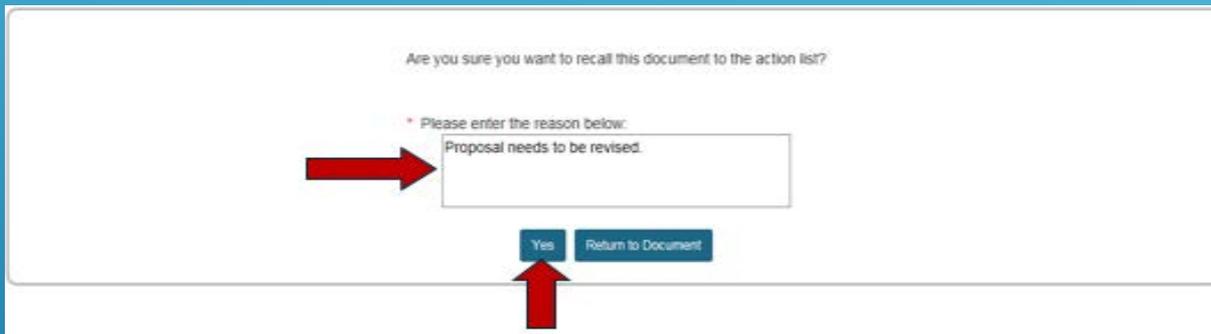


Rice Home KC Home Documentation Helpdesk				Currently signed in as: gerrard			
APP	4117	Proposal Development Document	QA AD test submit S; Proposal No: 118; PI: Andrew J. Gerrard; Sponsor: US NIH; Due Date: 10/31/2016	ENROUTE		12:59 PM 10/29/2015	

➤ The pending approver has the ability to recall a proposal document for revision after the document has been submitted into workflow.



➤ The pending approver enters a reason for recall and clicks 'Yes'.



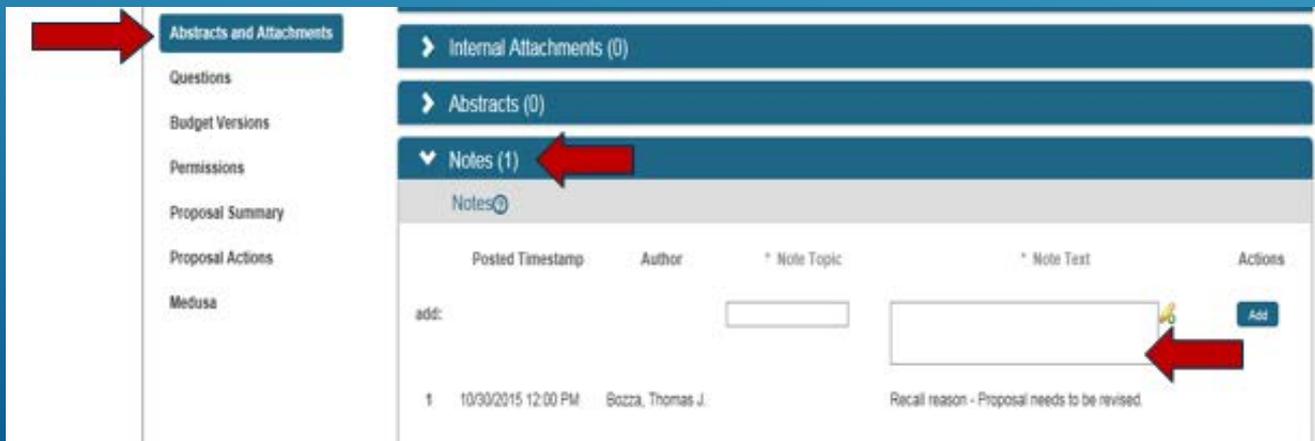
Are you sure you want to recall this document to the action list?

* Please enter the reason below:

Proposal needs to be revised.

Yes Return to Document

➤ The annotation of the recall will appear in the Notes section of Abstracts and Attachments tab.



	Posted Timestamp	Author	* Note Topic	* Note Text	Actions
add:			<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>
1	10/30/2015 12:00 PM	Bocza, Thomas J.		Recall reason - Proposal needs to be revised.	

➤ The aggregator will receive a notification of the recall in his action list.

Rice Home KC Home Documentation Helpdesk Currently signed in as petit

	3574	Proposal Development Document	TJB Proposal 8-12-1; Proposal No: 19; PI: Alexander M. Haimovich, Sponsor: National Science Foundation; Due Date: 11/02/2015	SAVED	11:26 AM 08/12/2015	NO
---	------	-------------------------------	--	-------	---------------------	----

➤ The log action message is an optional section where the user can add a message to the route log. The user enters the message followed by clicking the Log Action Message button.

Proposal Actions
Medusa

Route Log

Route Log

- ID: 3640
- Actions Taken
- Pending Action Requests
- Future Action Requests
- Log Action Message

Action Message: Log Action Message

➤ The log message will be added to the most recent action taken.

Actions Taken

Action	Taken By	For Delegator	Time/Date	Annotation
SAVED	Bozza, Thomas J.		02:53 PM 08/20/2015	
 COMPLETED	Bozza, Thomas J.		03:36 PM 10/16/2015	
 APPROVED	Zhou, Mengchu		03:44 PM 10/16/2015	
LOG MESSAGE	Bozza, Thomas J.		03:20 PM 10/19/2015	
LOG MESSAGE	Bozza, Thomas J.		03:26 PM 10/19/2015	Go Giants!!!!

- The user is able to add personnel to the current routing path.

Ad Hoc Recipients

Ad Hoc Recipients

Person Requests:

* Action Requested	* Person	Actions
APPROVE	<input type="text"/> 	<input type="button" value="Add"/>

- The user will search for and select the person.

KcPerson Lookup

KcPerson Id:	<input type="text"/>  	Last Name:	<input type="text" value="whitman"/>
First Name:	<input type="text"/>	User Name:	<input type="text"/>
Email Address:	<input type="text"/>	Office Phone:	<input type="text"/>
Active:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both	Home Unit:	<input type="text"/>
Campus Code:	<input type="text"/>  		

Return Value	KcPerson Id	Full Name	User Name	Email Address	Directory Department	Directory Title	Office Location	Office Phone	School	Active
return value	21202054	Gerald Whitman	whitman	gerald.whitman@njit.edu	251000	Professor		973-596-3232		Yes

One item found.

- The user will add the person and then click Send Ad-Hoc button.

Ad Hoc Recipients

Person Requests:

* Action Requested: APPROVE

* Person: whitman (Gerald Whitman)

Actions: Add

Ad Hoc Group Requests:

* Action Requested: APPROVE

* Namespace Code: []

* Name: []

Actions: Add

Submit To Sponsor | Send Notification | Send AdHoc | Close | Recall

- The ad hoc recipient will be listed under the Pending Action requests subsection.

Route Log

refresh

ID: 3717

Actions Taken

Pending Action Requests

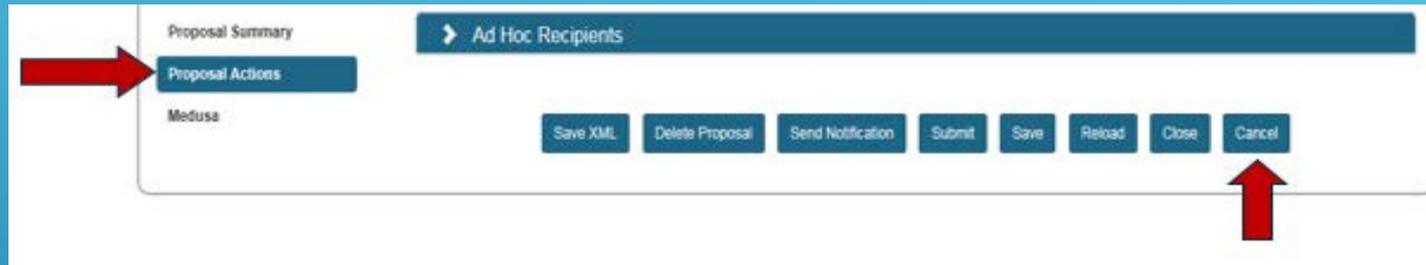
	Action	Requested Of	Time/Date	Annotation
show	IN ACTION LIST APPROVE	Whitman, Gerald	09:58 AM 10/20/2015	Ad Hoc Routed by bozza
show	IN ACTION LIST APPROVE	Zhou, Fengchu	09:30 AM 10/20/2015	KC-PD COI

- The initiator has the ability to delete/cancel a 'Saved' proposal document from his/her action list.



Rice Home	KC Home	Documentation	Helpdesk	Currently signed in as: bozza			
Show	4352	Proposal Development Document	TJB Proposal 11-18; Proposal No: 187; PI: Alexander M. Haimovich; Sponsor: US Dept Of The Army; Due Date: 11/30/2015	SAVED	01:07 PM	11/18/2015	

- The initiator navigates to the Proposal Actions tab, clicks the 'Cancel' button.



Proposal Summary

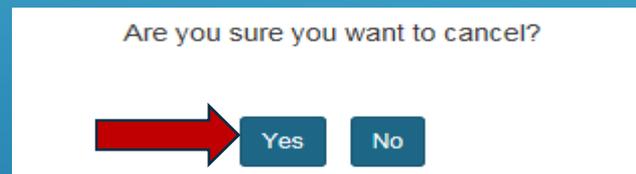
Ad Hoc Recipients

Proposal Actions

Medusa

Save XML Delete Proposal Send Notification Submit Save Reload Close Cancel

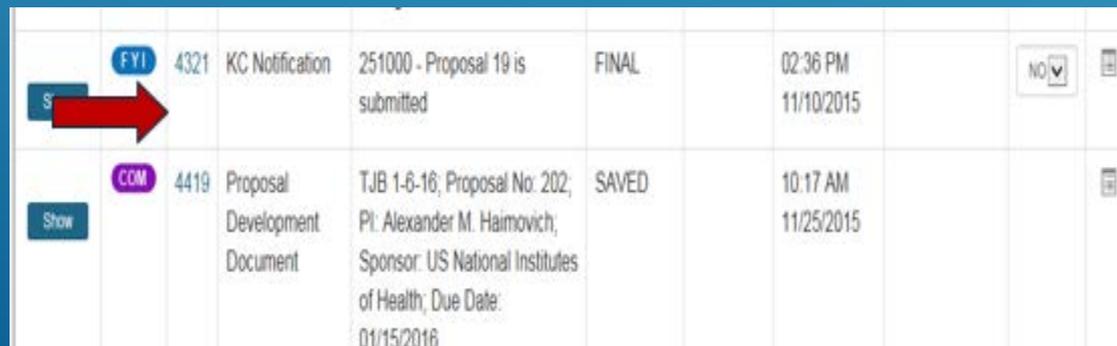
- Note: A warning message will follow asking 'Are you sure you want to cancel?'. The user will click 'Yes'.



Are you sure you want to cancel?

Yes No

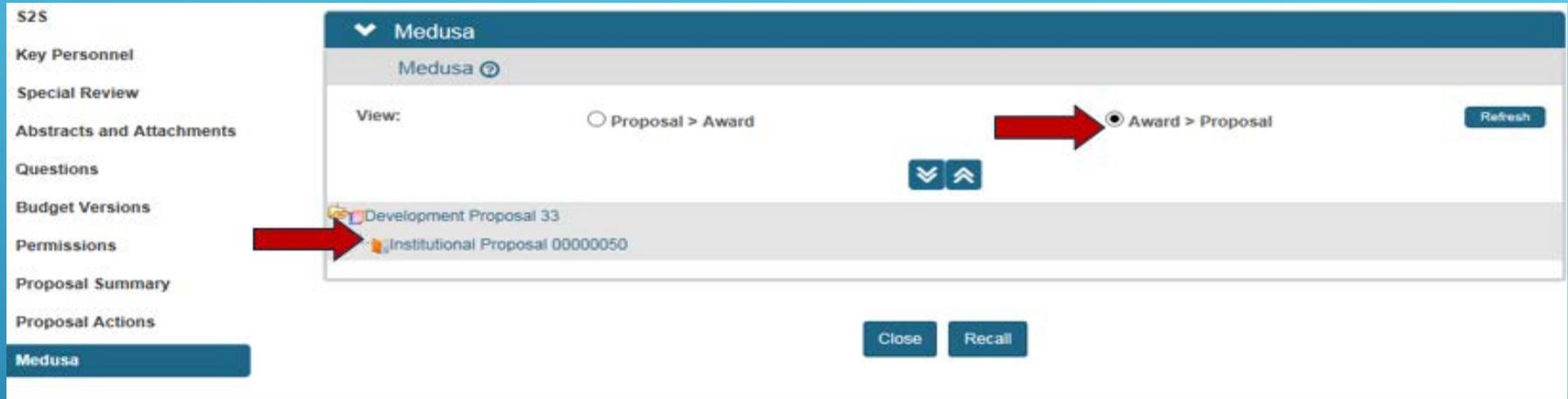
- The proposal document will no longer be listed on the initiator's action list.



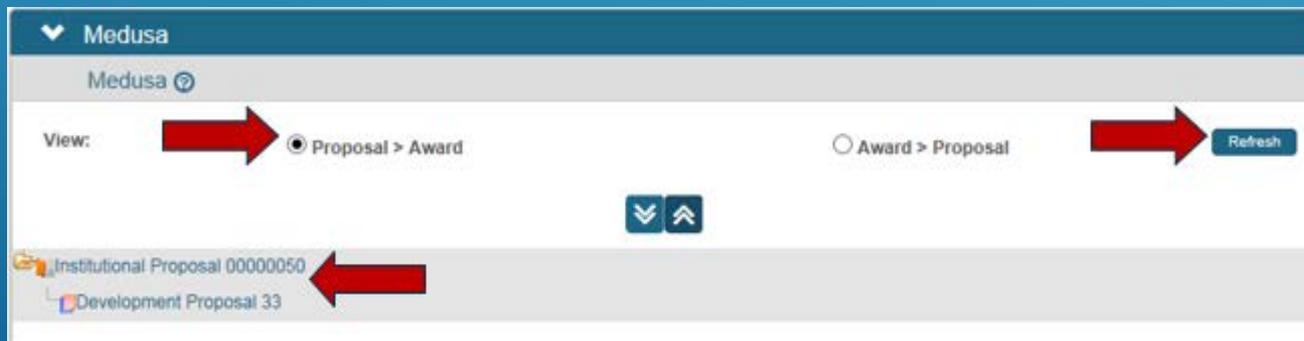
Show	FYI	4321	KC Notification	251000 - Proposal 19 is submitted	FINAL	02:36 PM	11/10/2015	NO	
Show	COM	4419	Proposal Development Document	TJB 1-6-16; Proposal No: 202; PI: Alexander M. Haimovich; Sponsor: US National Institutes of Health; Due Date: 01/15/2016	SAVED	10:17 AM	11/25/2015		

MEDUSA

➤ Medusa functions as a relational cross-reference, allowing the user to view different types of documents when they are associated with each other. Medusa allows the user to view fields of information and to navigate directly to each document.



➤ The user can change the hierarchical view, to show the Institutional Proposal listed first, followed by Development Proposal. The user selects the 'View', followed by clicking 'Refresh'.



➤ The user clicks 'Institutional proposal', the IP details will be displayed. The user can also navigate to the proposal document from here.

Institutional Proposal 00000050

Proposal No. 00000050 Title TJB Proposal 8-20-15 Status Pending

Proposal Type: New Sponsor Prpsl No: Activity Type: Research

Account: NSF Code: Notice of Opp: Sponsor: 31000253 US NIH Prime Sponsor:

Requested Start Date: 07/01/2016 Total Period 07/01/2016

Requested End Date: 06/30/2017 06/30/2018

Total Direct Cost: \$50,000.00 \$100,000.00

Total F&A Cost: \$26,750.00 \$53,500.00

Total All Cost: \$76,750.00 \$153,500.00

Investigators: Mengchu Zhou(Principal Investigator) Xuan Liu

Units: 251000 : Electrical and Computer Engineering(Lead Unit) 251000 : Electrical and Computer Engineering

Development Proposal 33

➤ The initial institutional proposal screen will appear, along with the other institutional proposal tabs.

KC Institutional Proposal Document Number : 4010 Document Status : FINAL Initiator Network Id : bozza Creation Timestamp : 04:14 PM 10/16/2015

Institutional Proposal

Contacts Custom Data Special Review Intellectual Property Review Distribution Institutional Proposal Actions Medusa

Document Overview

* Description : Generated by Dev Proposal 33 Explanation :

Organization Document Number :

Institutional Proposal

Institutional Proposal Number : 00000050 Institutional Proposal Version : 1

Fiscal Month/Year : 04/2016 Created from Prop Log : 00000050

Award ID : Status : Pending

Proposal Type : New Activity Type : Research

Initial Contract Admin : Proposal Create Date : 2015-10-16

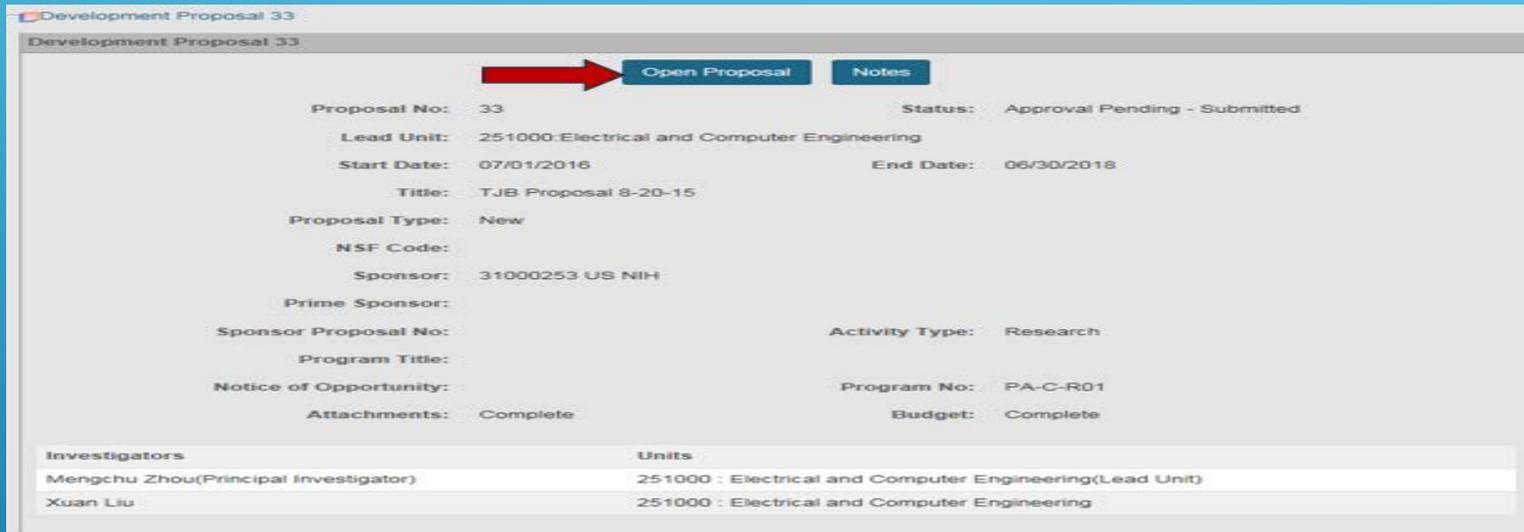
Updated By : bozza Last Update : 2015-10-16 16:14:40.0

Project Title : TJB Proposal 8-20-15

➤ The user can view the summary details of the Development Proposal.



➤ Development proposal details will be displayed. The user can also open the Development proposal from here.



➤ The initial Development proposal screen will appear, along with the other Development proposal tabs.



➤ The user can view proposal notes.

Development Proposal 33

Development Proposal 33

[Open Proposal](#) [Notes](#) ←

Proposal No: 33 Status: Approval Pending - Submitted

Lead Unit: 251000:Electrical and Computer Engineering

Start Date: 07/01/2016 End Date: 06/30/2018

Title: TJB Proposal 8-20-15

Proposal Type: New

NSF Code:

Sponsor: 31000253 US NIH

Prime Sponsor:

Sponsor Proposal No: Activity Type: Research

Program Title:

Notice of Opportunity: Program No: PA-C-R01

Attachments: Complete Budget: Complete

Investigators	Units
Mengchu Zhou(Principal Investigator)	251000 : Electrical and Computer Engineering(Lead Unit)
Xuan Liu	251000 : Electrical and Computer Engineering

➤ The user is directed to the Abstracts and Attachments tab- notes section.

Abstracts and Attachments

- Questions
- Budget Versions
- Permissions
- Proposal Summary
- Proposal Actions
- Medusa

➤ Internal Attachments (0)

➤ Abstracts (0)

▼ **Notes (1)** ←

Notes ⓘ

	Posted Timestamp	Author	* Note Topic	* Note Text	Actions
add:			<input type="text"/>	<input type="text"/>	Add
1	10/20/2015 10:45 AM	Bozza, Thomas J.	Proposal Document 3640	This is a note for Proposal Document 3640 ←	

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Contact Information

- For all technical questions pertaining to Streamlyne, please direct them to:
 - Thomas Bozza, Streamlyne Program Manager- Office of Sponsored Research Administration
973-596-5352; thomas.j.bozza@njit.edu

- For all proposal-specific & budget-specific questions, please direct them to the ambassador of your respective college:
 - Nancy Henderson, Program Manager- College of Computing Sciences
973-642-4566; nancy.henderson@njit.edu

 - John McCarthy, Director of Research- Newark College of Engineering
973-596-3247; john.p.mccarthy@njit.edu

 - Iris Pantoja, Program Manager- School of Management & College of Architecture and Design
973-642-4483; iris.pantoja@njit.edu

 - Cristo Yanez-Leon, Director of Research- College of Science & Liberal Arts
973-596-6426; leonc@njit.edu