



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

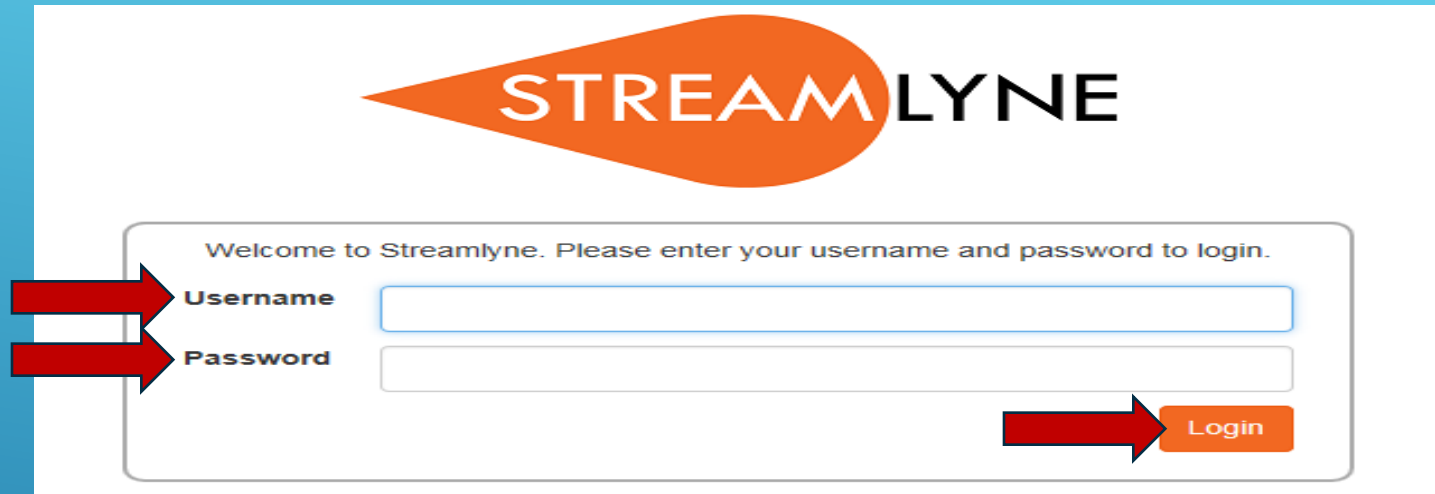
- ▶ The projected go-live of Streamlyne for NJIT is September, 2016. At the time of go-live, the legacy method of proposal/budget creation and submission will continue in parallel to the processing in Ekualiti until January, 2017.

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



The image shows the Streamlyne login page. At the top is the Streamlyne logo, which consists of an orange teardrop shape with the word 'STREAM' in white and 'LYNE' in black. Below the logo is a login form with a grey border. Inside the form, the text 'Welcome to Streamlyne. Please enter your username and password to login.' is displayed. There are two input fields: 'Username' and 'Password'. To the left of the 'Username' field, there are two red arrows pointing right. To the right of the 'Password' field, there is a red arrow pointing right towards the 'Login' button. The 'Login' button is orange with the word 'Login' in white text.

- 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**

[Main Menu](#) [System Admin](#) [Identity](#) [Maintenance](#)

Action List Messages

- Your Annual Disclosure is due.

Action List [Refresh](#) [Filter](#)

[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

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

Required Fields for Saving Document

Proposal Number : 552

* Proposal Type : New

* Lead Unit ID : 251000 - Electrical and Computer Engineering

* Activity Type : Research

* Project Title : Test Proposal 7-12-16

* Sponsor Code : 31000253
US NIH

* Project Start Date : 07/01/2016

* Project End Date : 06/30/2034

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: 

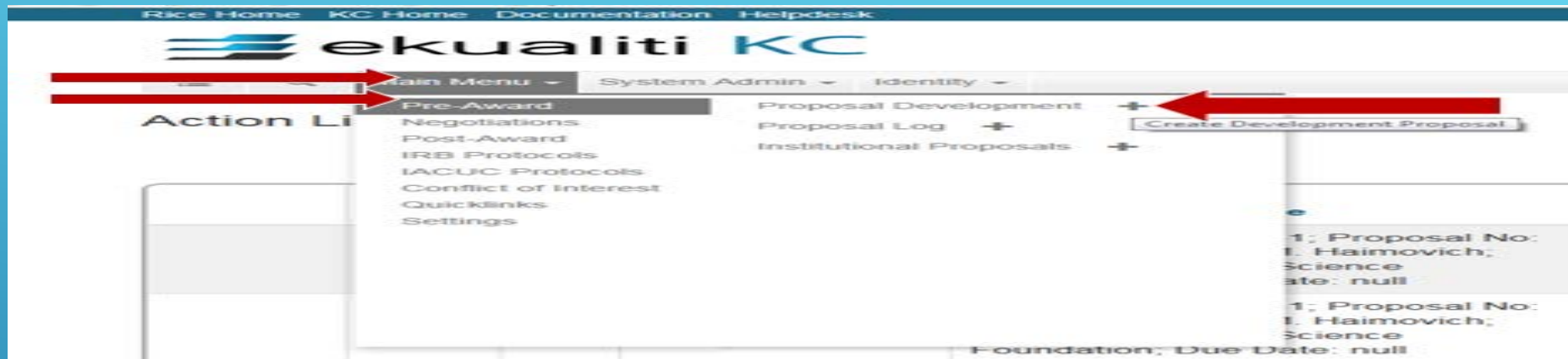
Name this search (optional):



- 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 shows the 'Required Fields for Saving Document' form. The 'Proposal' button in the left sidebar is highlighted with a red arrow. The form contains several required fields, each marked with an asterisk (*). The fields are: 'Proposal Number', 'Proposal Type' (dropdown), 'Lead Unit ID' (dropdown), 'Activity Type' (dropdown), 'Project Title' (text input), 'Sponsor Code' (text input), 'Project Start Date' (text input), and 'Project End Date' (text input). Red arrows point to each of these fields. A legend in the top right corner indicates that an asterisk (*) denotes a required field.

9

➤ 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

select
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

* Proposal Number:

* Proposal Type:

* Lead Unit ID:

* Activity Type:

* Project Title:

Institutional Field:

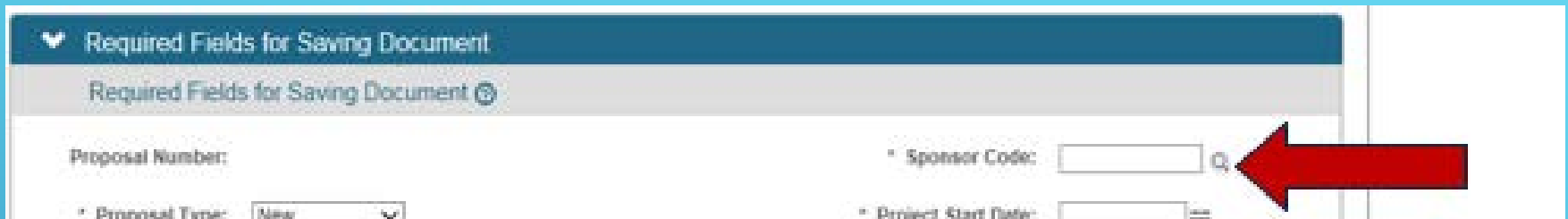
➤ The user selects the Activity Type from the dropdown menu.

* 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 Title:


* 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 Education
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



➤ 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:

select:

Audit Report Sent For FY:

Address Book Id:

☒ 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

Required Fields for Saving Document

Required Fields for Saving Document

Proposal Number: 136

* Sponsor Code:

12

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 dropdown arrow and the text 'S2S'. Below this is a light gray bar with 'Opportunity Search www.grants.gov' and a help icon on the left, and 'Grants.gov Forms Directory' on the right. The main content area is white. In the center, there is a search bar labeled 'S2S Lookup' with a magnifying glass icon. Below the search bar is a blue button labeled 'Remove Opportunity'. At the bottom, there is a list of four subpanels, each with a 'Show' button and a 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 S2S tab interface with the 'Opportunity' subpanel expanded. A red arrow points to the 'S2S Lookup' icon in the top bar. Another red arrow points to the 'Hide' button next to the 'Opportunity' subpanel header. The expanded subpanel contains the following fields: 'Opportunity ID:', 'Opportunity Title:' with a green icon, 'Submission Type:' with a dropdown menu showing 'Application', 'S2S Revision Type:' with a dropdown menu showing 'select' and an adjacent text input field, 'CFDA Number:', 'Competition Id:', 'Opening Date:', 'Closing Date:', 'Instruction Page:', 'Schema URL:', and 'S2S Provider:'.

➤ 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:



Search

Clear

Cancel



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

Remove Opportunity

Hide 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 homepage. At the top, there's a search bar with the text 'Grant Opportunities' and a 'GO' button. Below the search bar, there's a navigation menu with links like HOME, LEARN GRANTS, SEARCH GRANTS, APPLICANTS, GRANTORS, SYSTEM-TO-SYSTEM, FORMS, OUTREACH, and SUPPORT. The main content area is titled 'Find Grants' and 'Find Open Grant Opportunities'. It features a table of 'NEWEST OPPORTUNITIES' with columns for Funding Opportunity Number, Opportunity Title, and Agency. A red arrow points to the first row, which has the Opportunity ID 'PA-C-R01'.

Funding Opportunity Number	Opportunity Title	Agency
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 user can view the grants.gov instruction page, which will prompt a download of a PDF file.

The screenshot shows the 'Opportunity' details page for 'PA-C-R01'. It displays the 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', and Closing Date '06/25/2018 12:00 AM'. A red arrow points to the 'Instruction Page' link, which is 'https://trainingapply.grants.gov/apply/opportunities/instructions/oppPA-C-R01-cidFORMS-C-instructions.pdf'. Below this, a download prompt asks 'Do you want to open or save oppPA-C-R01-cidFORMS-C-instructions.pdf (20.7 KB) from trainingapply.grants.gov?'. The 'Open' button is highlighted with a red arrow.

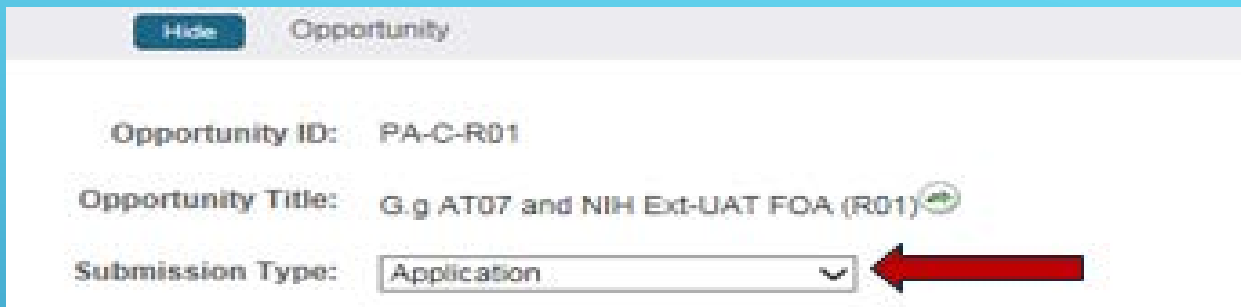
SF424 (R&R) General Application Instruction Links for FORMS-C Application Packages

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.



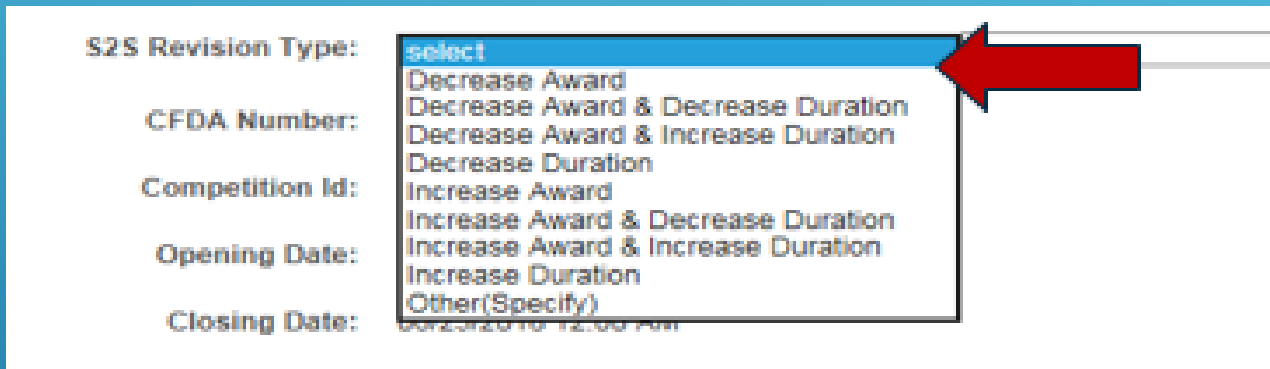
Hide Opportunity



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.



S2S Revision Type:  

CFDA Number:

Competition Id:

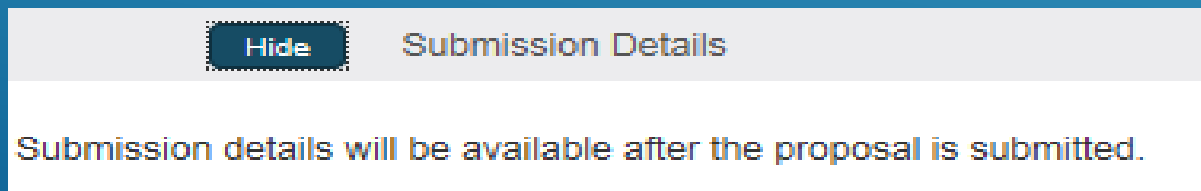
Opening Date:

Closing Date:

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)

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.*



Hide Submission Details

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.

Hide Forms

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?

Open Save Cancel

APPLICATION FOR FEDERAL ASSISTANCE SF 424 (R&R)

OMB Number: 4040-0001
Expiration Date: 06/30/2016

1.* TYPE OF SUBMISSION		3. DATE RECEIVED BY STATE		State Application Identifier NJ	
<input type="radio"/> Pre-application <input checked="" type="radio"/> Application <input type="radio"/> Changed/Corrected Application		4.a. Federal Identifier			
2. DATE SUBMITTED 2015-10-23		Application Identifier 33		b. Agency Routing Number	
5. APPLICANT INFORMATION		c. Previous Grants.gov Tracking ID			
* Legal Name: New Jersey Institute of Technology Department: Electrical and Computer Engin * Street1: NJIT Office of Sponsored Research Administration * City: Newark Province:		* Organizational DUNS:075162990 Division: University Street2: Suite 340, Fenster Hall, 323 Martin Luther King Blvd. County: * State: NJ: New Jersey * Country: USA: UNITED STATES * ZIP / Postal Code: 07102-1982			
Person to be contacted on matters involving this application Prefix: * First Name: Norma Position/Title: Director Sponsored Program * City: Newark Province:		Middle Name: Y. * Street1: University Heights County: * State: NJ: New Jersey * ZIP / Postal Code: 07102-1982 Email: norma.rubio@njit.edu			
* Phone Number: 973-596-6053		Fax Number: 973-596-6056		Suffix: Rubio Street2:	

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"/> 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.

//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	0	4
Asian	0	0	1	0	0	2	0	0	0	4
Native Hawaiian or Other Pacific Islander	1	0	0	0	0	1	0	0	0	3
Black or African American	0	0	0	0	0	2	0	0	0	3
White	5	10	0	0	0	1	0	0	0	17
More than One Race	0	0	1	0	0	2	0	0	0	4
Unknown or Not Reported	0	0	1	0	0	1	0	0	0	3
Total	4	11	3	0	0	11	0	0	0	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:  

Sponsor Deadline Type: ▼

Sponsor Name:

Prime Sponsor Code:  

NSF Science Code:  ▼

Sponsor Div Code:

Anticipated Award Type: ▼

Research Type: ▼ 

Agency Routing Identifier:

Sponsor Deadline Time: ⓘ

Notice of Opportunity: ▼

CFDA Number:

Opportunity ID:

Sponsor Proposal ID:

Does this proposal include subaward(s)?: ☐

Sponsor Program Code:

Prev Grants.Gov Tracking ID:

Opportunity Title:

- The Applicant and Performing Organizations will be populated with NJIT by default.
- (Optional) The user can add various performing site or other organization locations for the proposals.
- The user will click on the lookup icon to locate an organization to add.

The screenshot shows a form titled "Organization/Location" with four sections: "Applicant Organization", "Performing Organization", "Performance Site Locations", and "Other Organizations". Each section has a "Show" button and a "Congressional Districts" dropdown. Red arrows point to the lookup icons (magnifying glass) in the "Applicant Organization", "Performing Organization", and "Performance Site Locations" sections. A red arrow also points to the "Add" button in the "Performance Site Locations" section.

- All lookup screens behave the same where the user can refine their search, click the search button and then click on the 'return value' link for selection.

The screenshot shows the "Address Book Lookup" form with various input fields for search criteria. Below the form is a table with the following columns: "Return Value", "Address Book Id", "Organization", "Last Name", "First Name", "Middle Name", "Address Line 1", "Address Line 2", "Address Line 3", "City", "County", "State", and "Country Code". A red arrow points to the "Return Value" column in the table.

Return Value	Address Book Id	Organization	Last Name	First Name	Middle Name	Address Line 1	Address Line 2	Address Line 3	City	County	State	Country Code
return value	1014	Borough of Seaside Heights										

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

The screenshot shows a web application interface for adding organizations and locations. The 'Performance Site Locations' section is highlighted, and a red arrow points to the 'Add' button. Another red arrow points to the 'Add' button in the 'Other Organizations' section.

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

The screenshot shows a list of performance site locations. A red arrow points to the first line item, which is 'Borough of Seaside Heights'.

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

The screenshot shows the 'Delivery Info' section with several input fields. Red arrows point to the 'Mail By' dropdown, 'Mail Account ID' text box, 'Mailing Name & Address' dropdown, 'Type' dropdown, 'Number of Copies' text box, and 'Mail Description' text box.

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

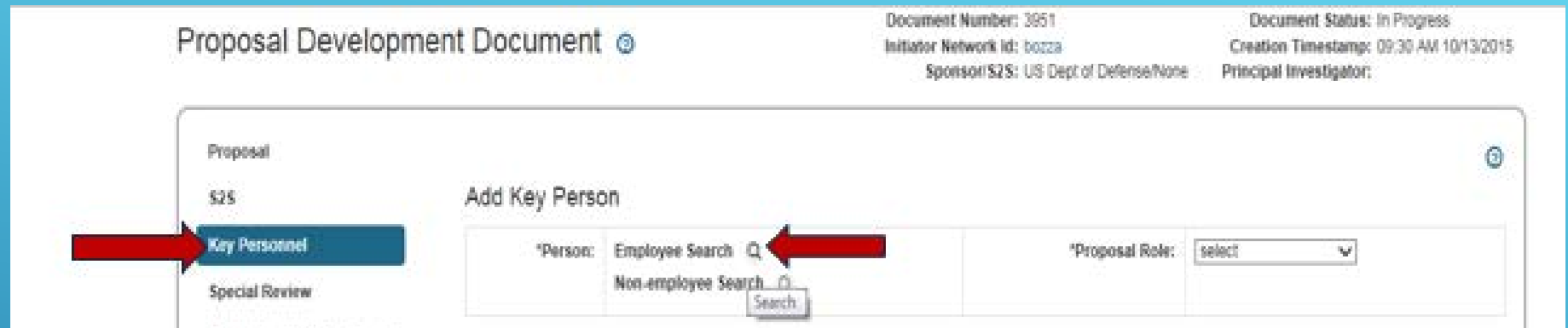
Document Status: In Progress
Creation Timestamp: 09:30 AM 10/13/2015
Principal Investigator:

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: ⓘ

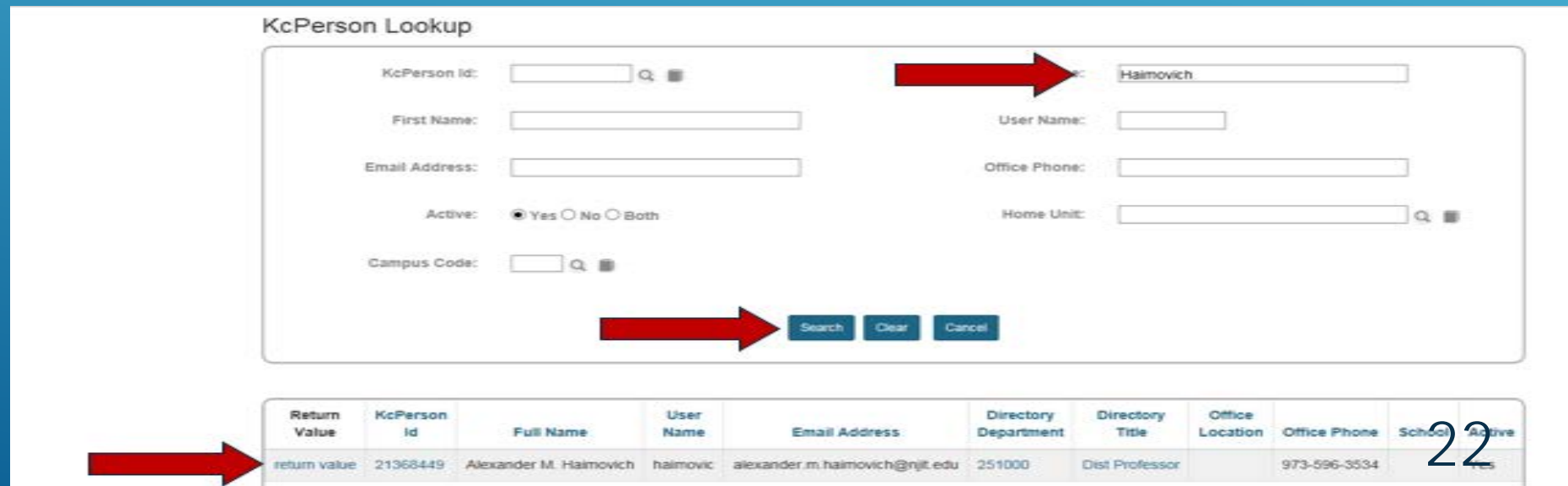
Office Phone: ⓘ

Home Unit: ⓘ ⓘ

Search Clear Cancel

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 Yes



- The user selects the proposal role for this person.

Add Key Person

*Person:	Alexander M. Haimovich	*Proposal Role:	<div>select Co-Investigator Key Person PI/Contact</div>
----------	------------------------	-----------------	---

Proposal Person Role Id

Clear Add

- 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.

Proposal

S2S

Key Personnel

Special Review

Abstracts and Attachments

Questions

Budget Versions

Permissions

Proposal Summary

Proposal Actions

Media

Add Key Person

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

Clear Add

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

⌵ ⌶

■ ➤ Alexander M. Haimovich Principal Investigator

* Indicates required field

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

The screenshot shows the 'Add Key Person' form. It has three main input fields: '*Person:' with the value 'Mengchu Zhou', '*Proposal Role:' with a dropdown menu showing 'Key Person', and '*Key Person Role:' with an empty text box. Below these fields are 'Clear' and 'Add' buttons. Two large red arrows are overlaid on the image: one points down to the 'Proposal Role' dropdown, and the other points down to the 'Key Person Role' text box.

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

This screenshot shows the 'Add Key Person' form with a list of key persons. The form includes search fields for 'Person' (Employee Search and Non-employee Search) and a 'Proposal Role' dropdown. Below the search fields are 'Clear' and 'Add' buttons. A light blue message bar states: 'Principal investigator is a required field prior to submission. Only one PI is allowed.' Below this is a list of key persons. The first entry is 'Mengchu Zhou' with the role 'Principal Investigator'. A red arrow points to the checkbox next to this entry, which is currently checked. The second entry is 'Combined Credit Split'. At the bottom of the form are buttons for 'Delete Selected', 'Save', 'Reload', and 'Close'. A red arrow points to the 'Delete Selected' button. A small legend indicates that an asterisk (*) denotes a required field.

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

https://config-kc.njit.ekualiti.com/proposalDevelopmentProposal.do

EKualiti Portal Index Kualiti :: Proposal Development ... Kualiti :: Proposal Developm...

File Edit View Favorites Tools Help

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

Document was successfully saved. * Indicates required field

Proposal Summary

Proposal Actions

Medusa

▼ ▲

■ ▼ 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.

https://config-kc.njit.ekualiti.com/proposalDevelopmentKeyPersonnel.do

EKualiti Portal Index Kuali :: Proposal Developm...

File Edit View Favorites Tools Help

Permissions

Proposal Summary

Proposal Actions

Medusa

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

* Indicates required field

▼ ▲

▼ ▲ Alexander M. Haimovich Principal Investigator

Alexander M. Haimovich

Show Person Details

Hide 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.

ctions

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				<div>Add</div>

- 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				<div>Add</div>
1 Bachelor of Science	Health		West University	<div>Show</div>

- 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"/>	<input type="button" value="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"/>	<input type="button" value="Add"/>
1	Electrical and Computer Engineering	251000	
2	Computer Science	210000	<input type="button" value="Add"/>

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- 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 form titled 'Person Certification Questions'. It contains three questions, each with a 'More Information' link. Red arrows point to the 'Yes' radio button for each question. At the bottom, a 'Save' button is highlighted with a red arrow.

Question 1: Do you certify that the proposal budget includes all the Cost Sharing, necessary equipment, installation, shipping, new space, renovation and/or facility modification costs? [More Information...](#)

Question 2: Do you 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? [More Information...](#)

Question 3: Do you have any significant financial interests (including that of my spouse and dependent children which jointly equals or exceeds \$5,000) in entities that would reasonably appear to be affected by the research or educational activities funded or proposed for funding; entities whose financial interests would reasonably appear to be affected by the research, or educational activities funded or proposed for funding? [Less Information...](#)

Explanation : Salary or any payment for services not otherwise identified as salary (e.g. consulting fees, honoraria, and paid authorship other than university salary, or university-paid royalties; Equity interests (e.g. stocks, stock options, or ownership interests); Intellectual property rights and interests (e.g. patents, copyrights, and royalties from such rights); Remuneration received from the sponsoring entity in the twelve months preceding the disclosure and the value of any equity interest in the sponsoring entity as of the date of the disclosure ;
Policy : In accordance with the Financial Conflict of Interest Policy you must indicate if you have any significant financial interests (including that of my spouse and dependent children which jointly equals or exceeds \$5,000) (i) that would reasonably appear to be affected by the research or educational activities funded or proposed for funding and (ii) in entities whose financial interests would reasonably appear to be affected by the research, or educational activities funded or proposed for funding.
Regulation :

☐ Yes ☒ No

[Save](#)

> Combined Credit Split

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

- 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.

The screenshot shows the 'More Information' page for the third question. It contains the same question text and a 'Less Information' link. Red arrows point to the 'Explanation', 'Policy', and 'Regulation' sections.

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

Explanation :
Policy :
Regulation :

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

The screenshot shows a web-based questionnaire interface. At the top, there is a 'Questions' tab and a 'Print' button, with a red arrow pointing to the 'Print' button. The form contains three questions, each with a 'More Information...' link:

- Question 1: "Are you currently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from current transactions by any Federal Department or agency?" with radio buttons for Yes (selected) and No.
- Question 2: "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.)" with radio buttons for Yes and No.
- Question 3: "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?" with radio buttons for Yes and No.

At the bottom, a yellow bar indicates a file download: "Do you want to open or save QuestionnaireAnswer1003.pdf (6.91 KB) from config-kr.njit.ekualiti.com?". Below this bar are buttons for 'Open', 'Save' (with a dropdown arrow), and 'Cancel'. Red arrows point to the 'Open' and 'Cancel' buttons.

The screenshot shows a completed questionnaire form titled "Questionnaire". The form contains the following information:

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



Sub Module: Proposal Person Certification
Principal Investigator: Alexander M. Haimovich
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
- 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 
	Non-employee Search 



- 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"/> 
Sponsor:	<input type="text"/> 	Address Line 1:	<input type="text"/>
Address Line 2:	<input type="text"/>	Address Line 3:	<input type="text"/>
City:	<input type="text"/>	Comments:	<input type="text"/>
Country Code:	<input type="text" value="select"/> 	County:	<input type="text"/>
State:	<input type="text"/> 	Delete Flag:	<input type="text"/>
Email Address:	<input type="text"/>	Fax Number:	<input type="text"/>
First Name:	<input type="text"/>	Last Name:	<input type="text" value="Sumner"/> 
Middle Name:	<input type="text"/>	Organization:	<input type="text"/>
Owned By Unit:	<input type="text"/> 	Phone Number:	<input type="text"/>
Postal Code:	<input type="text"/>	Prefix:	<input type="text"/>
Sponsor Address Flag:	<input type="text"/>	Suffix:	<input type="text"/>
Title:	<input type="text"/>		





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:

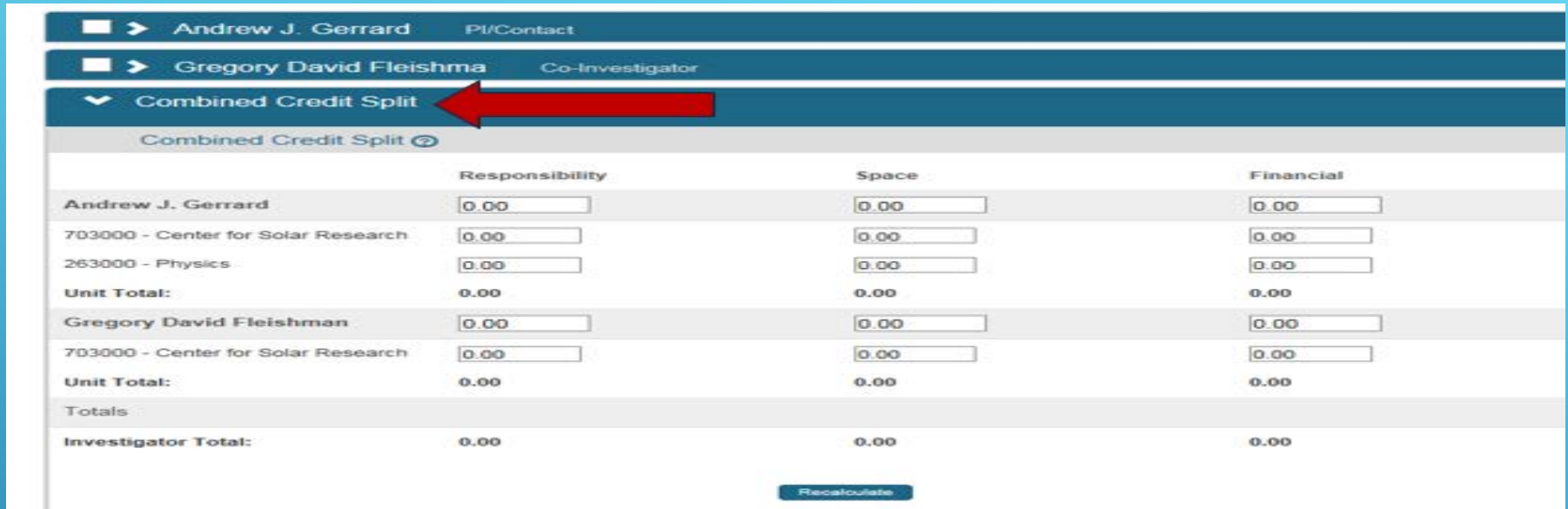
- At least one Unit is required for Gordon M. Sumner.

	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.



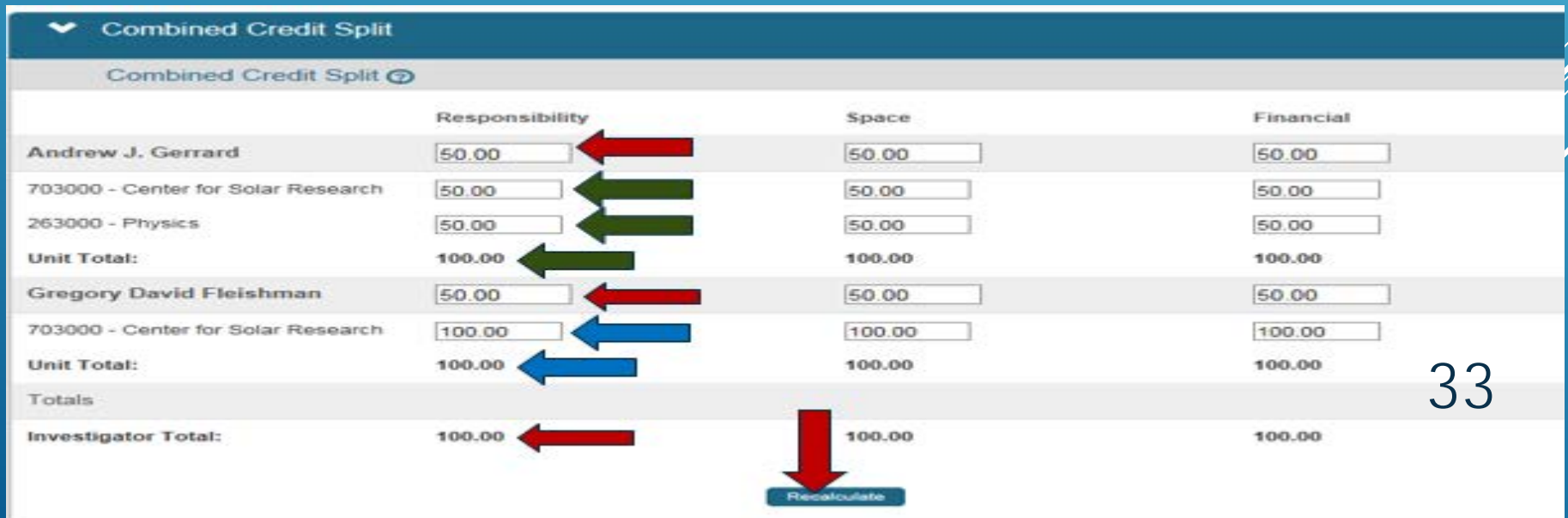
The screenshot shows the 'Combined Credit Split' form with a red arrow pointing to the title. The form is divided into sections for Andrew J. Gerrard and Gregory David Fleishman, each with a 'Unit Total' row. The 'Investigator Total' row at the bottom shows zero values for all three columns: Responsibility, Space, and Financial. A 'Recalculate' button is at the bottom right.

	Responsibility	Space	Financial
Andrew J. Gerrard	0.00	0.00	0.00
703000 - Center for Solar Research	0.00	0.00	0.00
263000 - Physics	0.00	0.00	0.00
Unit Total:	0.00	0.00	0.00
Gregory David Fleishman	0.00	0.00	0.00
703000 - Center for Solar Research	0.00	0.00	0.00
Unit Total:	0.00	0.00	0.00
Totals			
Investigator Total:	0.00	0.00	0.00

Recalculate

- 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 50% values entered for all personnel and units. The 'Investigator Total' row shows 100% values for all three columns. A red arrow points to the 'Recalculate' button at the bottom right.

	Responsibility	Space	Financial
Andrew J. Gerrard	50.00	50.00	50.00
703000 - Center for Solar Research	50.00	50.00	50.00
263000 - Physics	50.00	50.00	50.00
Unit Total:	100.00	100.00	100.00
Gregory David Fleishman	50.00	50.00	50.00
703000 - Center for Solar Research	100.00	100.00	100.00
Unit Total:	100.00	100.00	100.00
Totals			
Investigator Total:	100.00	100.00	100.00

Recalculate

➤ 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 web application. The sidebar on the left contains the following links: Abstracts and Attachments (highlighted with a red arrow), Questions, Budget Versions, Permissions, Proposal Summary, Proposal Actions, and Medusa.

The main content area is titled 'Add Proposal Attachments' and includes a status message: 'this proposal is being submitted via Grants.gov'. Below this, there is a form for adding attachments. The form includes the following fields and buttons:

- Mark all attachments:** A dropdown menu set to 'select' and an 'Update' button.
- * Attachment Type:** A dropdown menu (indicated by a red arrow).
- * File Name:** A text input field with a 'Browse...' button (indicated by a red arrow).
- Status:** A dropdown menu (indicated by a red arrow).
- Contact Name:** A text input field.
- Uploaded By:** A text input field.
- Email Address:** A text input field.
- Posted Timestamp:** A text input field.
- Phone Number:** A text input field.
- Comments:** A text input field (indicated by a red arrow).
- Description:** A text input field (indicated by a red arrow).
- Add:** A button to submit the attachment.

Below the form, there is a section for the added attachment, titled '1. Other - Incomplete' (indicated by a red arrow). This section displays the following information:

- * Attachment Type:** Other
- * File Name:** Export ControlRev10715.docx
- * Status:** Incomplete
- Contact Name:** (empty text input field)
- Uploaded By:** Bocza, Thomas J.
- Email Address:** (empty text input field)
- Posted Timestamp:** 10/14/2015 03:04 PM
- Phone Number:** (empty text input field)
- Comments:** Proposal Attachment 10-14-15
- * Description:** Proposal Attachment 10-14-15

At the bottom of the attachment list, 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:

* File Name: Export ControlRev10715.docx

Contact Name:

Email Address:

Phone Number:

* Description:

➤ 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:

select

Update

Hide

 1. Narrative - Complete

Attachment Type : Narrative

* Status : Complete

Uploaded By : Kam, Moshe

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

Comments :

File Name :

TJB Narrative.pdf

Contact Name :

Email Address :

Phone Number :

Description :

View

Replace

Cancel

Save

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

▼ Proposal Attachments (3)

Mark all attachments:

select

Update

Hide

 1. Narrative - Complete

Attachment Type : Narrative

* Status :

Complete

Uploaded By : Kam, Moshe

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

Comments :

File Name :

C:\Users\bozza\Documen

Browse...

Contact Name :

Email Address :

Phone Number :

Description :

View

Cancel

Save

- 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

🔍

Add

1

KC-WKFLW:All Past Approvers

Delete

Notification Message

Subject

251000 - Notification : Narrative added to proposal : 358

Message

The updated Narrative has been uploaded for Proposal : 358

📎

Send

Cancel

- All past approvers will receive emails notifying them of the attachment replacement.



- All past approvers will also receive FYI notifications on their action lists.

Rice Home		KC Home		Development Document		Date: 01/01/2016		12/17/2015		Currently signed in as haimovic	
Show	APP	4702	Proposal Development Document	Test for Validation; Proposal No: 239; PI: Gerald Whitman; Sponsor: National Aeronautics and Space Administration; Due Date: 01/15/2016	ENROUTE		01:29 PM 12/17/2015				
Show	APP	5055	Proposal Development Document	proposal 1-27-16; Proposal No: 314; PI: Alexander M. Haimovich; Sponsor: US National Institutes of Health; Due Date: 02/15/2016	ENROUTE		02:42 PM 01/27/2016				
Show	COM	5185	Proposal Development Document	QA AD test; Proposal No: 350; PI: Alexander M. Haimovich; Sponsor: National Science Foundation; Due Date: 03/31/2016	SAVED		04:00 PM 02/10/2016				
Show	FYI	5287	KC Notification	251000 - Notification : Narrative added to proposal : 358	FINAL		03:04 PM 02/25/2016				

20 items found, displaying 11 to 20.

« < 1 2 > »

- The user is able to delete the attachment.

▼ Proposal 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.

Proposal Attachments (3)

Add Proposal Attachments

Mark all attachments: **select** **Complete** **Incomplete** **Update**

* Attachment Type: **select** * File Name: **select** **Browse...**

Status: **select** Contact Name:

Uploaded By: Email Address:

Posted Timestamp: Phone Number:

Comments: Description:

Add **Reset**

Hide 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 * File Name: **TJB Research Plan-Strategy.pdf**

* Status: **Incomplete** Contact Name:

Uploaded By: Bozza, Thomas J. Email Address:

Posted Timestamp: 05/20/2016 12:18 PM Phone Number:

Comments: Description:

View **Replace** **Delete** **View/Edit Rights** **Cancel** **Save**

Hide 2. Narrative - Incomplete

Validation Errors found in this Section:

- * Proposal Attachment Status Codes must be set to "Complete".

* Attachment Type: Narrative * File Name: **TJB Narrative.pdf**

* Status: **Incomplete** Contact Name:

Uploaded By: Bozza, Thomas J. Email Address:

Posted Timestamp: 05/20/2016 12:18 PM Phone Number:

Comments: Description:

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

Proposal Attachments (3)

Add Proposal Attachments

Mark all attachments: **select** **Complete** **Incomplete** **Update**

* Attachment Type: **select** * File Name: **select** **Browse...**

Status: **select** Contact Name:

Uploaded By: Email Address:

Posted Timestamp: Phone Number:

Comments: Description:

Add **Reset**

Hide 1. PHS_ResearchPlan_ResearchStrategy - Complete

* Attachment Type: PHS_ResearchPlan_ResearchStrategy * File Name: **TJB Research Plan-Strategy.pdf**

* Status: **Complete** Contact Name:

Uploaded By: Bozza, Thomas J. Email Address:

Posted Timestamp: 05/20/2016 12:18 PM Phone Number:

Comments: Description:

View **Replace** **Delete** **View/Edit Rights** **Cancel** **Save**

Hide 2. Narrative - Complete

* Attachment Type: Narrative * File Name: **TJB Narrative.pdf**

* Status: **Complete** Contact Name:

Uploaded By: Bozza, Thomas J. Email Address:

Posted Timestamp: 05/20/2016 12:18 PM Phone Number:

Comments: Description:

- 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:							
1:	06/30/2016 10:31 AM	Bozza, Thomas J.	Daniel E. Bunker	Biosketch		Biosketch.pdf	

- 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:						
1:	10/14/2015 03:20 PM	Bozza, Thomas J.	Other Institutional Attachment	Internal Attachment 10-14-15	Export Control Questions.docx	

- 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:			<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"/>

- 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:			<input type="text"/>	<input type="text"/>	<input type="button" value="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.

♥ Abstracts (1)

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.

https://config-kc.njit.ekualiti.com/proposalDevelopmentProposal.do

EKualiti Portal Index EKualiti Portal Index Kualiti :: Proposal Developm...

File Edit View Favorites Tools Help

Initiator Network ID: 0022a Creation Timestamp: 10:26 AM 10/15/2015
Sponsor/S2S: US NIH/Grants.Gov Principal Investigator: Alexander M. Haimovich

Proposal
S2S
Key Personnel
Special Review
Abstracts and Attachments
Questions
Budget Versions
Permissions
Proposal Summary
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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

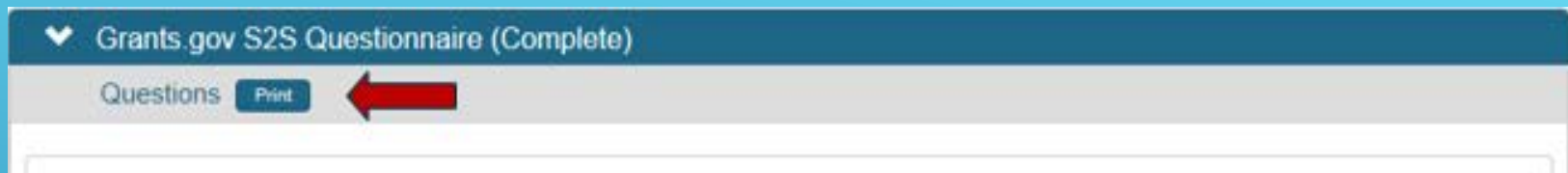
- The user will answer some questions which will lead to further questions. Example: 'Is the proposal subject to review by state executive order 12372 process?' If answered YES, an additional question will appear prompting a response (the entering of a date).

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.' The 'Yes' radio button for the fourth question is selected, indicated by a red arrow. The date input field for the fifth question is also highlighted with a red arrow.

- 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' path for the question 'Is the proposal subject to review by state executive order 12372 process?'. The 'No' radio button is selected, indicated by a red arrow. Below this, a new question appears: '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, also indicated by a red arrow.

- 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 PII/AOR 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

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

Document was successfully saved. ✕

* Indicates required field

▼ 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"/>							<input type="button" value="Add"/>

➤ 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"/>							<input type="button" value="Add"/>
<input type="button" value="Hide"/> Budget 6-21-16	1	0.00	0.00	0.00	<input type="text" value="select"/>	<input type="checkbox"/>	<input type="button" value="Open"/> <input type="button" value="Copy"/>

Residual Funds:

Cost Sharing: 0.00

Unrecovered F&A: 0.00

Comments:

F&A Rate Type: MTDC - Federal

Last Updated: Jun 21, 2016 9:04:38 AM

Last Updated By: bozza

- 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	2	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

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	<div><div></div>30.00</div>
MTDC Federal	Yes	2017	07/01/2016	53.50	<div>53.50</div>
MTDC State	No	2017	07/01/2016	10.00	<div>10.00</div>
MTDC State	Yes	2017	07/01/2016	10.00	<div>10.00</div>

Sync Rates

Reset Rates

Sync All Rates

Reset All Rates

Save

Cancel

Close

- 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.

Yes

No

- 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"/>

Sync Rates

Reset Rates

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.

➔

Yes

No

➤ 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	<input type="text" value="27.50"/>
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"/>

➡ Sync Rates

Reset Rates

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.

➡ Yes

No

- 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	<input type="text" value="26.00"/>

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

➡ Sync All Rates

Reset All Rates

Reload

Close

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').

Rates

Summary

Personnel

Non-Personnel

Distribution & Income

Modular Budget

Budget Actions

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 <input type="text"/> Non-employee Search <input type="text"/> To be named <input type="text"/>						
1	Daniel E. Bunker (Principal Investigator)	B1006 Associate Professor	9M DURATION	99,702.00	08/01/2016	Delete Base Salary by Period

Sync Personnel

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

Yes **No**

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

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 <input type="text"/> Non-employee Search <input type="text"/> To be named <input type="text"/>						

Sync Personnel

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 <input type="text"/> Non-employee Search <input type="text"/> To be named <input type="text"/>						
1	Daniel E. Bunker (Principal Investigator)	B1006 Associate Professor	9M DURATION	99,702.00	08/01/2016	Delete Base Salary by Period

55



- 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
Totals:		0.00	0.00	Delete	

- 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.

<div>Hide</div> 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	<div>Calculate</div> <div>Details</div> <div>Delete</div>	
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.


<div>Hide</div> 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.

<div>  <div>Hide</div> Rate Classes </div>				
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	<div> <div>Calculate</div> <div>  <div>Details</div> </div> </div>	
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	
Summary 08/01/2016	07/31/2017	35000	0.00	Calculate Delete

- 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					0.00	0.00	0.00	0.00	
Delete	1	08/01/2016	07/31/2017	12.0	57,976.18	37,769.50	20,206.68	0.00	4,
	2	08/01/2017	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:



Search

Clear

Cancel

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



1

TBA Research

Default Job Code Title



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 ⓘ	<input type="text"/> ⓘ	Delete Base Salary by Period
2	Research Associate	AA000 ⓘ Default Job Code Title	12M DURATION ⓘ	0.00	08/01/2016 ⓘ	<input type="text"/> ⓘ	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

Select

* Object Code Name

select

Group

(new group)

Action

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.

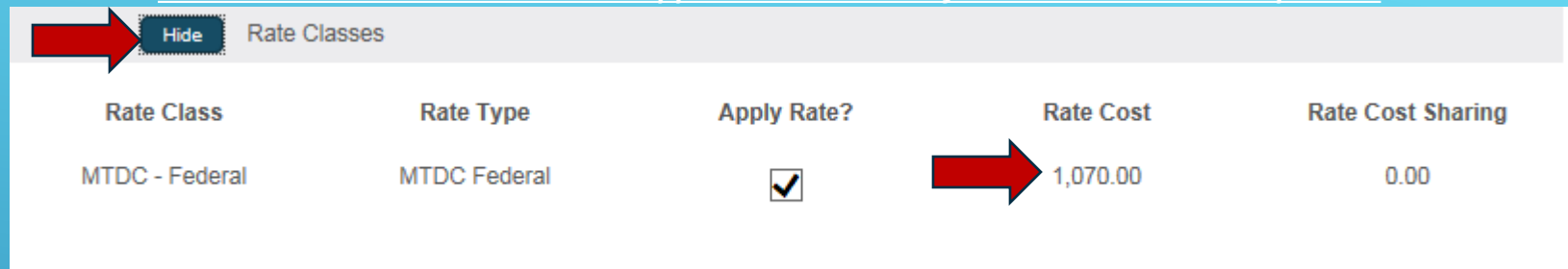
Hide

Line Item Details

* Start Date	08/01/2016 ⓘ	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	This is my equipment expense for 6-22-16 ⓘ		

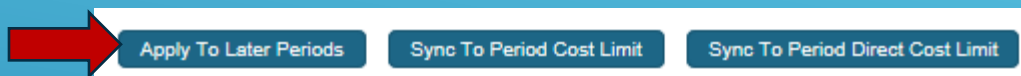
➤ Since this particular expense carries indirect cost, the user will verify the indirect cost amount.

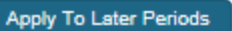


➤ Note: the Indirect Cost details will appear in this section for all Non-Personnel expenses.



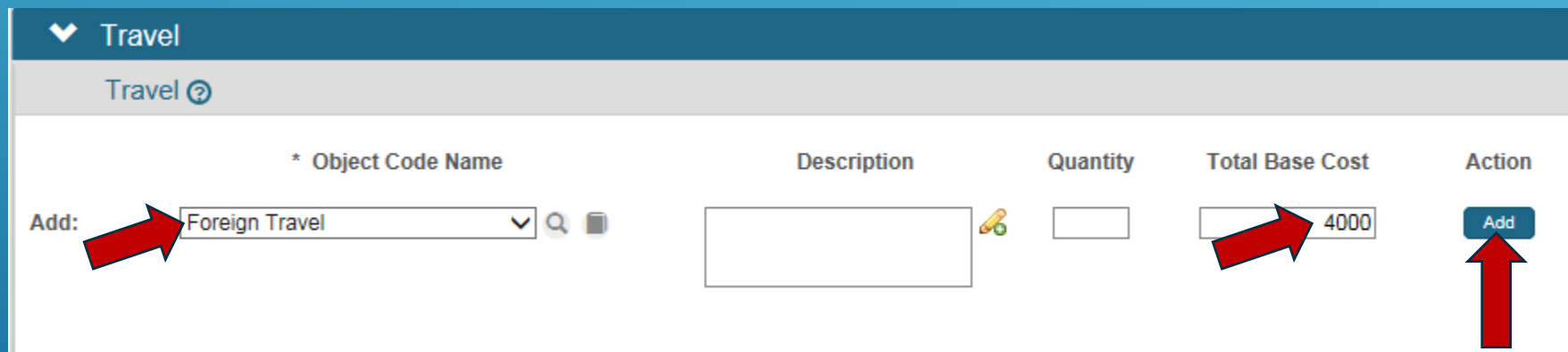
Rate Classes				
Rate Class	Rate Type	Apply Rate?	Rate Cost	Rate Cost Sharing
MTDC - Federal	MTDC Federal	<input checked="" type="checkbox"/>	1,070.00	0.00

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



➤ 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.

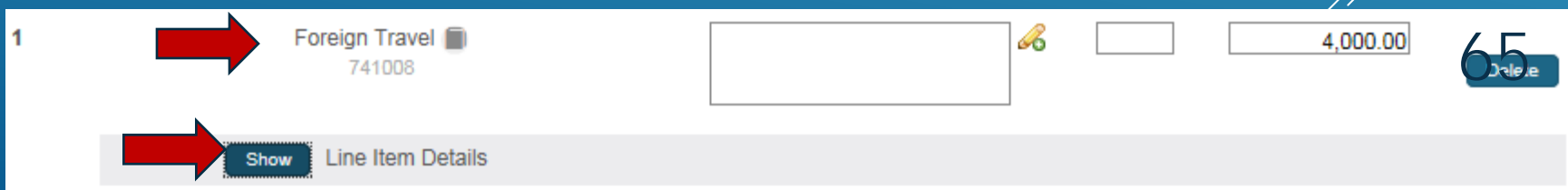




Travel

Travel ?

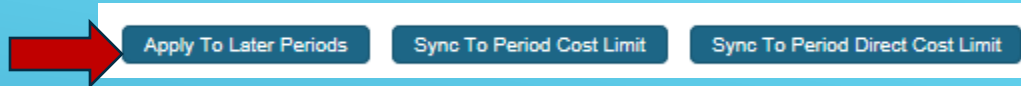
* Object Code Name	Description	Quantity	Total Base Cost	Action
Add: Foreign Travel			4000	Add

➤ 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	Foreign Travel 741008			4,000.00	
 Line Item Details					

➤ 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 screenshot of the 'Participant Support' form. It has a header 'Participant Support' with a dropdown arrow. Below it is a sub-header 'Participant Support' with a lock icon. The form includes a field 'Number of Participants' with an input box. Below that is a table with columns: '* Object Code Name', 'Description', 'Quantity', 'Total Base Cost', and 'Action'. In the 'Add:' row, the 'Object Code Name' is 'Participant Support' (selected from a dropdown), 'Description' is an empty box, 'Quantity' is an empty box, 'Total Base Cost' is '1000' (with a red arrow pointing to it), and the 'Action' is 'Add' (with a red arrow pointing to it). There are also search and list icons next to the 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 screenshot of a line item for 'Participant Support' with ID 756916. It shows a description box, a quantity box, and a total base cost of '1,000.00'. A 'Delete' button is on the right. Below the line item is a 'Show' button and the text 'Line Item Details'. Red arrows point to the 'Show' button and the line item header.

➤ 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.

The screenshot shows the 'Other Direct' form. At the top, there is a header 'Other Direct' with a dropdown arrow. Below it, a sub-header 'Other Direct' with a question mark icon. The form has five columns: '* Object Code Name', 'Description', 'Quantity', 'Total Base Cost', and 'Action'. In the 'Add:' row, the 'Object Code Name' field is set to 'Supplies' with a dropdown arrow and a magnifying glass icon. A red arrow points to this field. The 'Description' field is empty with a pencil icon. The 'Quantity' field is empty. The 'Total Base Cost' field contains '1000' with a red arrow pointing to it. The 'Action' column has a blue 'Add' button with a red arrow pointing to it.

- 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.

The screenshot shows a line item with the number '1' on the left. A red arrow points to the 'Supplies' object code and another red arrow points to the 'Show' button. The line item details include the object code 'Supplies 734000', a description field, a quantity field, and a total base cost of '1,000.00'. A 'Delete' button is on the right. Below the line item, there is a 'Show' button and the text 'Line Item Details'.

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

The screenshot shows three buttons: 'Apply To Later Periods', 'Sync To Period Cost Limit', and 'Sync To Period Direct Cost Limit'.

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

Budget Period: 1: 08/01/2016 - 07/31/2017 View: Full Detail Update 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: 2: 08/01/2017 - 07/31/2018 View: Full Detail Update 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

Project End Date : 07/31/2018

Total Direct Cost Limit :

Budget Status : Incomplete ▼

Final? ☐

On/Off Campus : Default ▼

Comments :

Modular Budget? ☒

Residual Funds :

Total Cost Limit :

Unrecovered F & A Rate Type : MTDC - Federal ▼

F&A Rate Type : MTDC - Federal ▼

Submit Cost Sharing? ☒

➤ 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"/>	<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" 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'.

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

Budget Overview (Period 1)
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
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)
Equipment

* Object Code Name	Description	Quantity	Total Base Cost	Action
select			0.00	Add
1 Capital Equipment >= \$5K 710000			15,000.00	Delete

Hide

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

☒

Budget Category

Equipment

Submit Cost Sharing?

☒

Budget Justification Notes

Show

Rate Classes

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

* Object Code Name	Description	Quantity	Total Base Cost	Action
Add: <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	\$ 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"/>	
Delete	1	<input type="text" value="08/01/2016"/>	<input type="text" value="07/31/2017"/>	12.0	300,000.00	279,793.32	20,206.68	0.00	4,
Delete	2	<input type="text" value="08/01/2017"/>	<input type="text" value="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"/>	<div>Add</div>
1	<input type="text" value="1"/>	<input type="text" value="0.00"/>	<input type="text"/>	4,251.18	<div>Delete</div>
2	<input type="text" value="2"/>	<input type="text" value="0.00"/>	<input type="text"/>	4,399.97	<div>Delete</div>
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

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➤ 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"/>	<button>Add</button>
1	<input type="text" value="1"/>	<input type="text" value="0.00"/>	Source Account 1	4,251.18	<button>Delete</button>
2	<input type="text" value="2"/>	<input type="text" value="0.00"/>	Source Account 2	4,399.97	<button>Delete</button>



➤ 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"/>	<input type="text" value="Select"/>	<input type="text"/>	<input type="text" value="0.00"/>	<button>Add</button>
1	<input type="text" value="2017"/>	<input type="text" value="10.00"/>	<input type="text" value="Yes"/>		30000	
2	<input type="text" value="2017"/>	<input type="text" value="10.00"/>	<input type="text" value="No"/>		20000	
3	<input type="text" value="2018"/>	<input type="text" value="10.00"/>	<input type="text" value="Yes"/>		10000	
4	<input type="text" value="2018"/>	<input type="text" value="10.00"/>	<input type="text" value="No"/>		11999.82	
Total Allocated:					\$0.00	
Unallocated:					\$71,999.82	

Unrecovered F&A Summary

Period 1: 01/01/2017 - 12/31/2017:	\$71,999.82
Period 2: 01/01/2018 - 12/31/2018:	\$0.00

Reset to DefaultRecalculate

➤ 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.



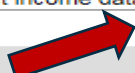

Project Income (0)

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:	<input type="text" value="25000.00"/>
Period 2 Income:	0.00
Total Income:	<input type="text" value="25000.00"/>

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➤ 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'.

Personnel
Non-Personnel
Distribution & Income
Modular Budget
Budget Actions

➤ Modular Budget Overview (Project)
➤ Direct Cost
➤ F&A

Sync Save Reload Close

Are you sure you want to sync the modular budget?

Yes No

- 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

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- 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 End Date: 07/31/2017

Period 1 Total Requested Cost: \$ 320,206.68

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 ⓘ

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

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 End Date: 07/31/2018

Period 2 Total Requested Cost: \$ 320,913.92

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 ⓘ

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

➤ 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	Fringe Benefits	Salaries & Wages
Senior Personnel					
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					
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					
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					
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	\$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	

 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"/> 🔍	<input type="text"/> 📎		<input type="text"/> Browse...	<button>Add</button>

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"/> 🔍 Rutgers The State University	<input type="text"/> 📎		<input type="text"/> Browse...	<button>Add</button>

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

1

<input type="text"/> 🔍 Rutgers The State University	<input type="text"/> 📎	RR_Budget_1_3	Subaward- Rutgers.pdf <button>Replace</button> <button>Delete</button>	<button>View PDF</button> <button>View XML</button> <button>Sync from PDF</button> <button>Delete</button>
--	------------------------	---------------	---	---

Show Attachment Details

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.

Budget Rates are out of sync.

 Fix

 Fix

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



- 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.

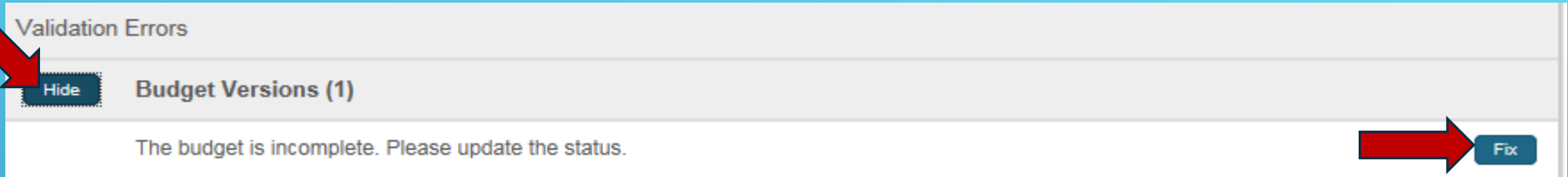


- Another window will appear and the user will click 'Yes', followed by clicking 'Save'.

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

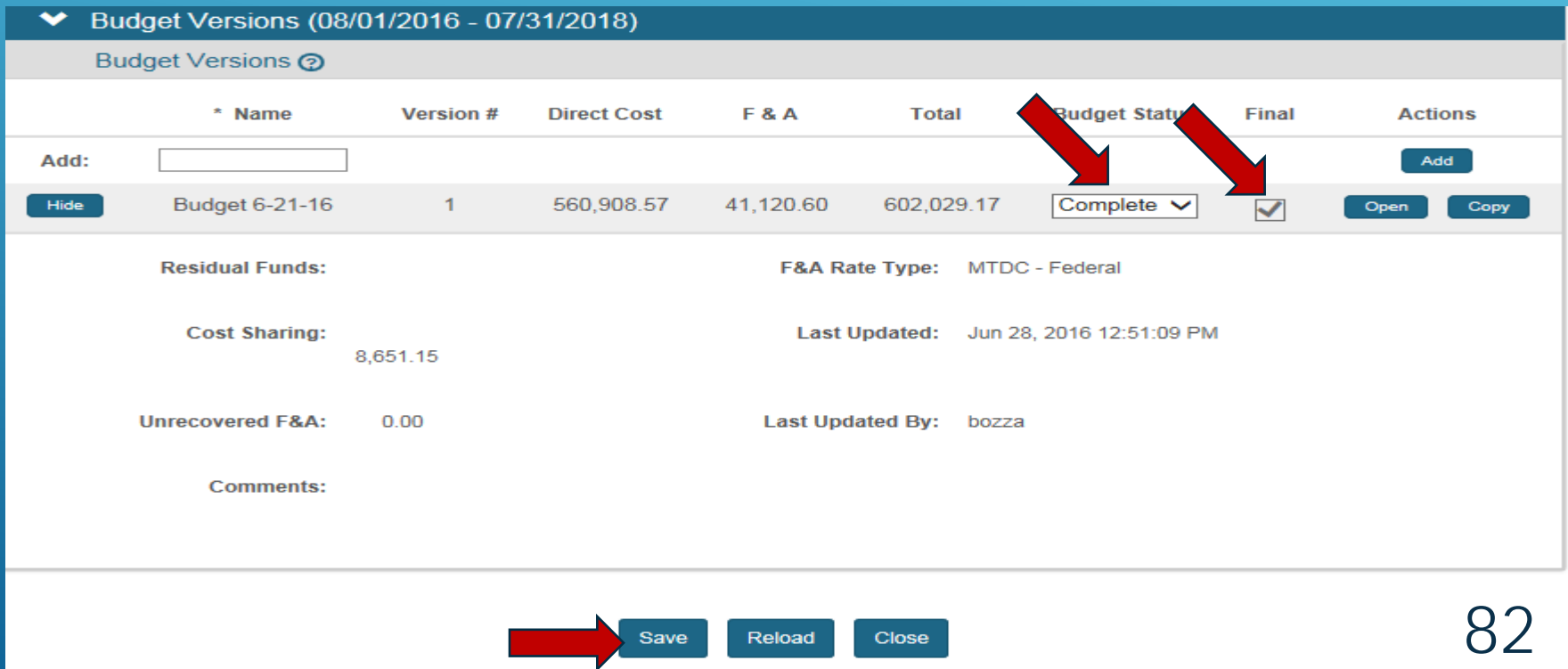
[Hide](#) Budget Versions (1)

The budget is incomplete. Please update the status.

[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](#)

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- 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.

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

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

Personnel	Edit			
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	Edit			
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'.

Key Personnel

Special Review

Abstracts & Attachments

Questions

Budget Versions

Permissions

Special Review

Special Review ?

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

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.

Medusa

Medusa ?

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.

Users

* User Name	Full Name	Unit #	Unit Name	Role	Actions
<input type="text"/>				select	<input type="button" value="Add"/>

- The user will search for and select the name.

KcPerson Lookup

KcPerson Id:

First Name:

Email Address:

Active: ☒ Yes ☐ No ☐ Both

Campus Code:

Last Name:

User Name:

Office Phone:

Home Unit:

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.

Users

Name	Full Name	Unit #	Unit Name	Role	Actions
<input type="checkbox"/>	Alexander M. Haimovich	251000	Electrical and Computer Engineering	select	<input type="button" value="Add"/>
	Thomas J. Bozza	701000	Sponsored Research Administration	Aggregator	<input type="button" value="Edit Role"/> <input type="button" value="Delete"/>

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

Users

* User Name	Full Name	Unit #	Unit Name	Role
Add: <input type="text"/>				select
1 haimovic	Alexander M. Haimovich	251000	Electrical and Computer Engineering	Budget Creator

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- 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.

Roles	
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.

Assigned Roles	View Permissions
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.

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

Yes

No

- The person will no longer be listed.

Users					
Users ⓘ					
* User Name	Full Name	Unit #	Unit Name	Role	
Add: <input type="text"/>	<input type="text" value="select"/>				
1 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.

S2S

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

Proposal Summary

Proposal Information

Title	TJB Proposal 8-20-15	Proposal Number:	33
Principal Investigator	Mengchu Zhou	Sponsor:	US NIH
Project Start Date	07/01/2016		
Lead Unit	251000 - Electrical and Computer Engineering	Project End Date	06/30/2018
Activity Type	Research	Sponsor Deadline Date:	10/30/2015
		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"/>	<input type="checkbox"/>	Print
2 Budget Cumulative Report	<input type="checkbox"/>	<input type="checkbox"/>	Print
3 Budget Salary Report	<input type="checkbox"/>	<input type="checkbox"/>	Print
4 Budget Summary Report	<input type="checkbox"/>	<input type="checkbox"/>	Print
5 Budget Summary Total Report	<input type="checkbox"/>	<input type="checkbox"/>	Print
6 Budget Total Report	<input type="checkbox"/>	<input type="checkbox"/>	Print
7 Industrial Budget Report	<input type="checkbox"/>	<input type="checkbox"/>	Print
8 Industrial Cumulative Budget Report	<input type="checkbox"/>	<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
Proposal Title: TJB Proposal 8-20-15
Investigator Name: Mengchu Zhou
Period: 07/01/2016 - 06/30/2018
Comments:

Budget Version: 1

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
	Off - 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

Budget Periods
 F & A
 Budget Reports

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

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 - MTDC 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 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
Proposal Number: 317
Title: QA AD
Proposal Person: Thomas J. Bozza
Sub Module: Proposal Person Certification
Principal Investigator: Thomas J. Bozza
Person Role: Principal Investigator

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

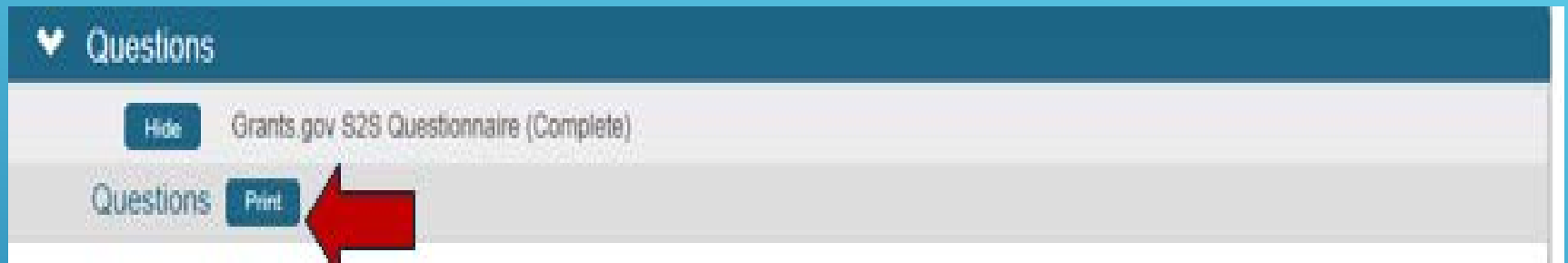
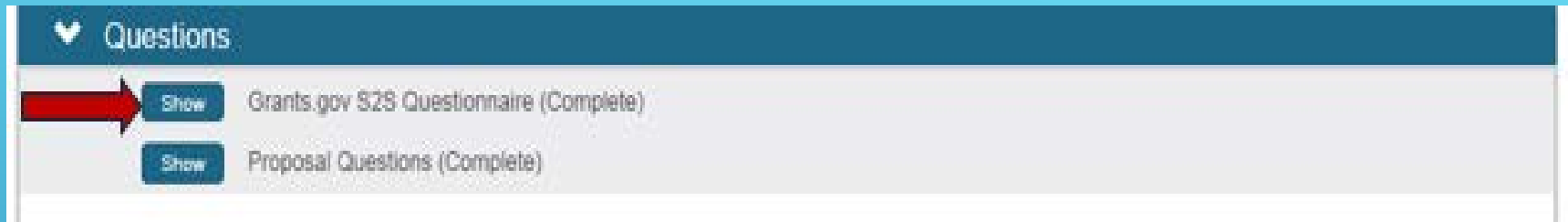
- No, I am not currently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from current transactions by any Federal Department or agency.
No
- No, I have not lobbied or will not lobby a Federal agency on behalf of this award.
No
- Yes, I agree and certify that 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.

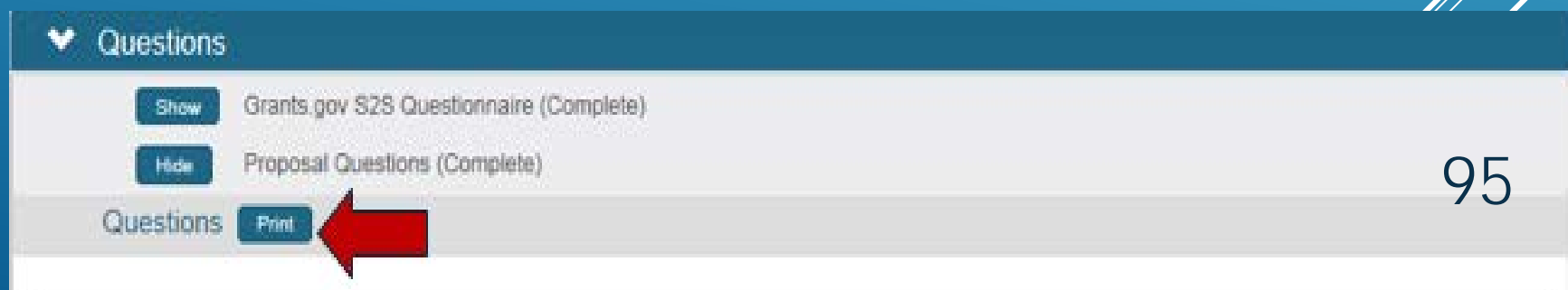
▼ Key Personnel (2)				
Key Personnel Information				
	Key Person	Role	Unit	Proposal Person Certification
1	Mengchu Zhou	Principal Investigator	Electrical and Computer Engineering	View (Complete)
2	Xuan Liu	Co-Investigator	Electrical and Computer Engineering	View (Incomplete)
				Print All
 Show Combined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



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



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

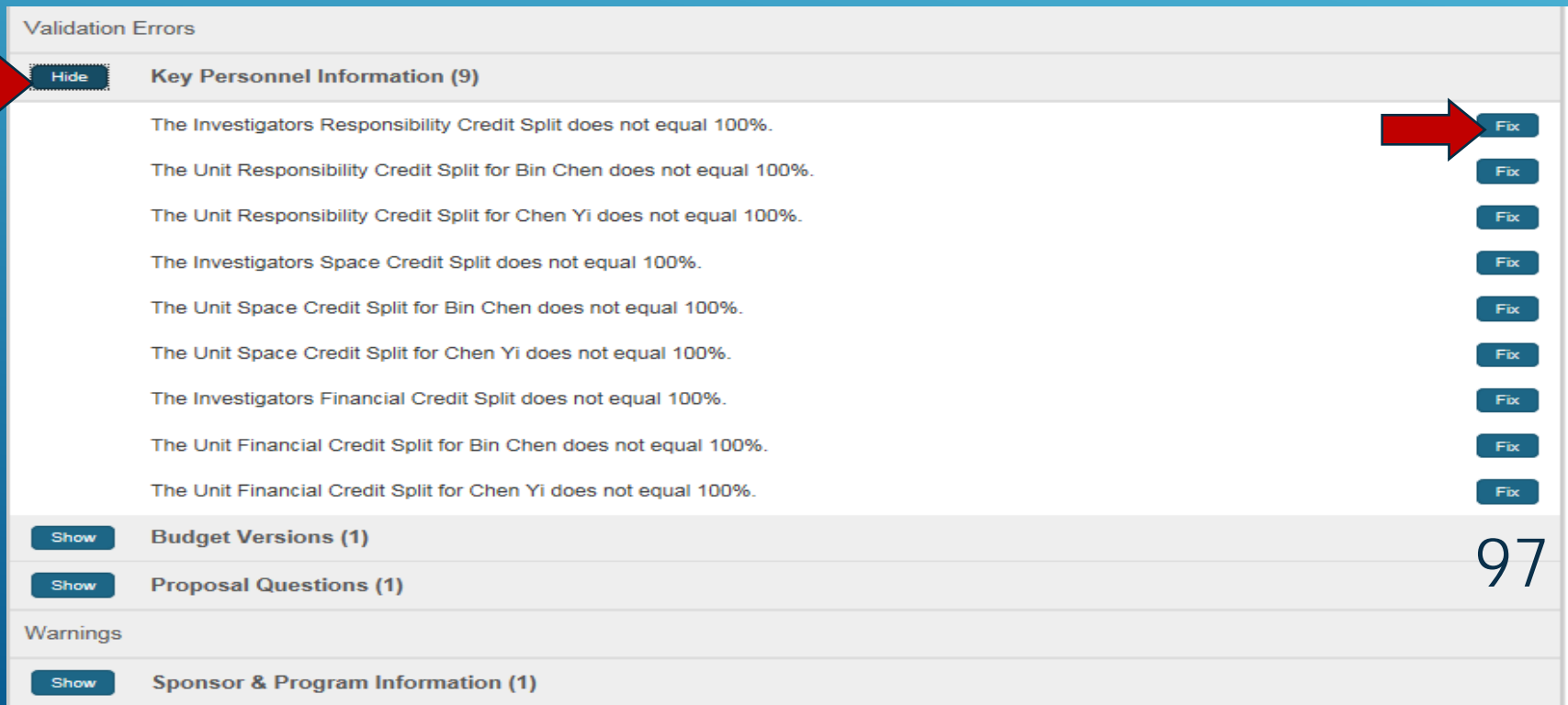
Human Subjects Sections

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.



- 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.



- 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)

- 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"/>

Print Selected

Select (all | none)

- 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

- 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.	
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	Funds Requested by Proposer
				CAL	ACAD
				SUMR	Funds Granted by Sponsor (If Different)
1. Chen, Bin				0.00	0.00
2. Yi, Chen				0.00	0.00
3. Haimovich, Alexander				9.000000	0.00
4. Haimovich, Alexander				9.000000	0.00
5.					
6. () OTHERS (LIST INDIVIDUALLY ON BUDGET EXPLANATION PAGE)				0	0
7. (4) TOTAL SENIOR PERSONNEL (1-6)				18	0
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.

Print

Print ⓘ

Show Print Grants.gov Forms (10)

Show Print Sponsor Form Packages (22)

Show Print Reports

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

Hide Print Reports

Person Lookup

Current Report Pending Report

Initiate Initiate

- The user will search for and select the person.

KcPerson Lookup

KcPerson Id: First Name: Email Address: Active: ☒ Yes ☐ No ☐ Both Campus Code: Last Name: zhou User Name: Office Phone: Home Unit:

Search Clear Cancel

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

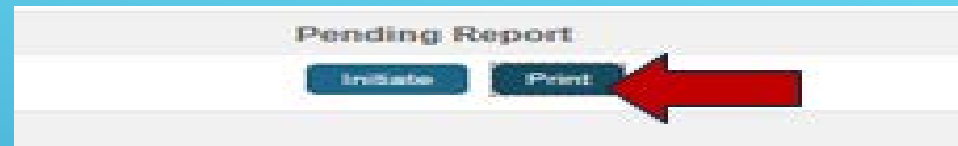
Current Report Pending Report

Initiate Print Initiate Print

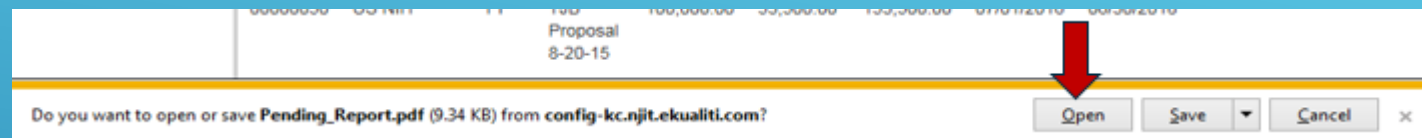
- The user will view the list of agencies/reports associated with proposals for a particular person.

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 F&A Cost	Total Requested Cost	Effective Date	End Date	Effort %	Academic Year Effort %	Summer Year Effort %	Calendar Year Effort %
00000005	New Jersey Medicaid Commission	PI	Config test	\$0.00	\$0.00	\$0.00		06/30/2016				
00000011	US NIH	XP	August 13 Workshop	\$0.00	\$0.00	\$0.00		06/30/2016				
00000005	US NIH	PI	TJH Proposal 8-20-16	\$100,000.00	\$51,500.00	\$151,500.00	07/01/2016	06/30/2016				

- 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 

1 KC-PD:Aggregator 

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:  

Return	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.

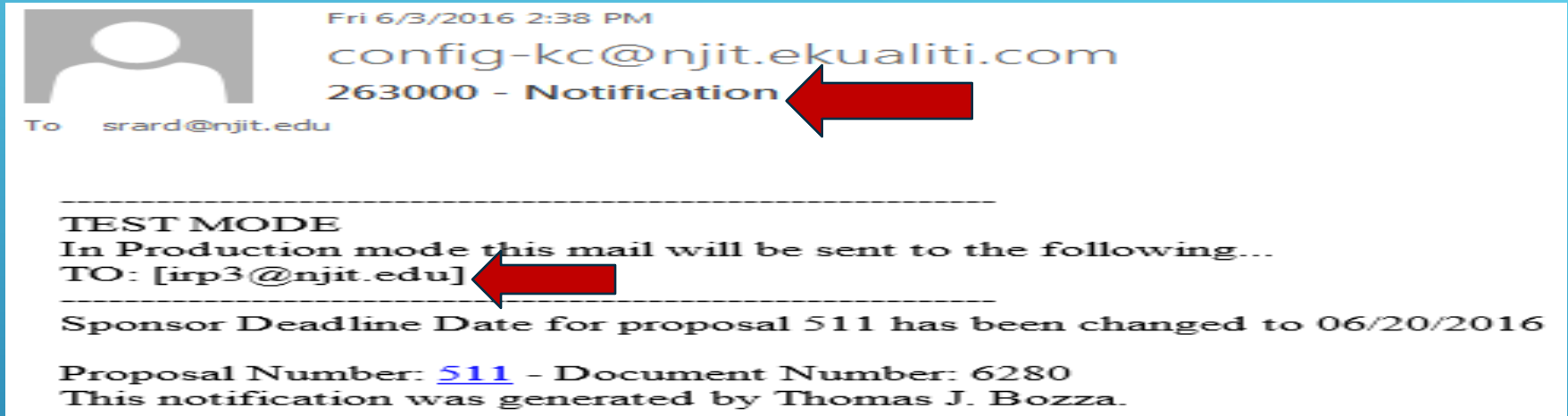
Thomas J. Bozza

KC-PD:Aggregator 

➤ 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.

A screenshot of a notification table and its details. The table has columns for 'Hide', 'FYI', '6351', 'KC Notification', '265000 - Proposal 271 is submitted', and 'FINAL'. A red arrow points to the 'Hide' button. Below the table, the details for the notification are shown, including 'Id: 1173', 'From: bozza', 'Recipients: bozza', 'Channel: KC Notification Channel', 'Producer: Notification System', 'Type: FYI', 'Priority: Normal', 'Send Date: 2016-06-03T13:15:20.000-04:00', and 'Removal Date: none'. The 'Title' is '265000 - Proposal 271 is submitted' and the 'Content' is 'The Proposal 271 has been submitted to sponsor. The institute proposal number is 00000574.' Below the content, it says 'Proposal Number: 271 - Document Number: 4823' and 'This notification was generated by Thomas J. Bozza.' A red arrow points to the '271' in the proposal number.

- 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		

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- 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
IN ACTION LIST COMPLETE	Bozza, Thomas J.	02:35 PM 02/03/2016	

Future Action Requests

Log Action Message

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		

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

Pending Action Requests

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 jmcCarthy

- 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
<div>show</div> <div>IN ACTION LIST APPROVE</div>	Unit Approver Type NCEChiefECE Unit Number 251000	12:31 PM 06/06/2016	KC-WKFLW Unit Approver 1 Derived Role

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 <<mailto: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.

Rice Home KC Home Documentation Helpdesk

Currently signed in as tsybesko

Action List

Refresh

Filter

Apply Default

NONE

	Action	Id	Type	Title	Route Status	Delegator	Date Created	Group Request	Actions	Log
<div>Show</div>	<div>APP</div>	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 ChairECE Unit Number 251000		

➤ The Chair will click the 'Approve' button.

Pending Action Requests

Action	Requested Of	Time/Date	Annotation
<div>IN ACTION LIST APPROVE</div>	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

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- 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			
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		
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>

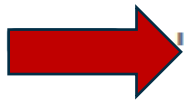
For additional help, email <<mailto:config-rice@njit.ekualiti.com>>


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.


IN ACTION LIST


 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

Add

1 KC-PD:Aggregator

Delete

Notification Message

Subject

251000 - Proposal 327 is submitted

Message

The Proposal 327 has been submitted to sponsor. The institute proposal number is 00000580.

Include Document Link

Send

Cancel

- 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		
		Refresh

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

Hide

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.

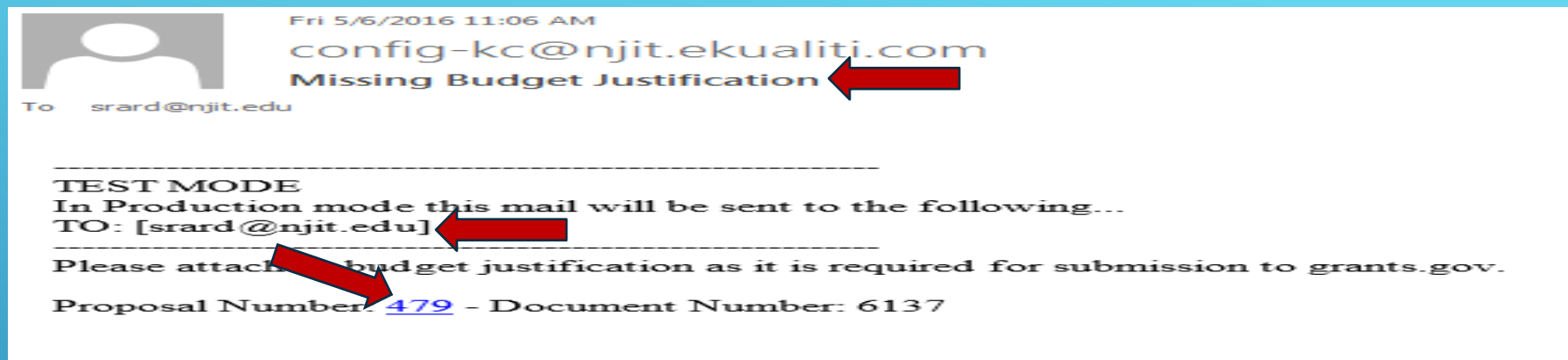
Include Document Link

☒


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 petit									
	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 screenshot shows a web interface for a proposal document. On the left, there is a sidebar with links: 'Proposal Summary', 'Proposal Actions', and 'Medusa'. The main content area has a header with 'Attachments', 'Validations', and 'Print' links. Below this, there is a text area for an approval signature. At the bottom, there are three buttons: 'Approve', 'Disapprove', and 'Reject'. A red arrow points to the 'Disapprove' button.

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

The screenshot shows a confirmation dialog box with the text 'Are you sure you want to **disapprove** this document?'. Below this, there is a text input field with the placeholder text 'Please enter the reason below:'. A red arrow points to the input field, and another red arrow points to the 'Yes' button.

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

The screenshot shows a user's action list. The top navigation bar includes links for 'Rice Home', 'KC Home', 'Documentation', and 'Helpdesk'. The user is signed in as 'gerrard'. The action list table has columns for 'Action', 'ID', 'Document', 'Status', and 'Date'. A red arrow points to the 'ACK' icon in the 'Action' column of the first row.

Action	ID	Document	Status	Date
ACK	3965	Proposal Development Document	DISAPPROVED	12:27 PM 10/13/2015

- 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).

Proposal Summary
Proposal Actions
Medusa

Budget Data Override
Route Log
Ad Hoc Recipients

Reject Send Notification Send Ad-Hoc Approve Disapprove Close

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

S2S

Key Personnel
Special Review
Abstracts and Attachments
Questions
Budget Versions
Permissions
Proposal Summary
Proposal Actions

Proposal Development Rejection Confirmation

Are you sure you want to reject this document?

Rejection Reason: Proposal is rejected because it needs revision.

Attachment: C:\Users\bozzal\Documents Browse...

Yes No

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


Abstracts and Attachments
Questions
Budget Versions
Permissions
Proposal Summary
Proposal Actions
Medusa

Internal Attachments (1)

Internal Attachments @

Posted Timestamp	Uploaded By	Attachment Type	Description	File Name	Actions
10/30/2015 12:34 PM	Petit, Matthew L.	Other Institutional Attachment	Proposal rejection attachment.	PHS398_CumulativeInclusionReport-V3.0.pdf	View

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

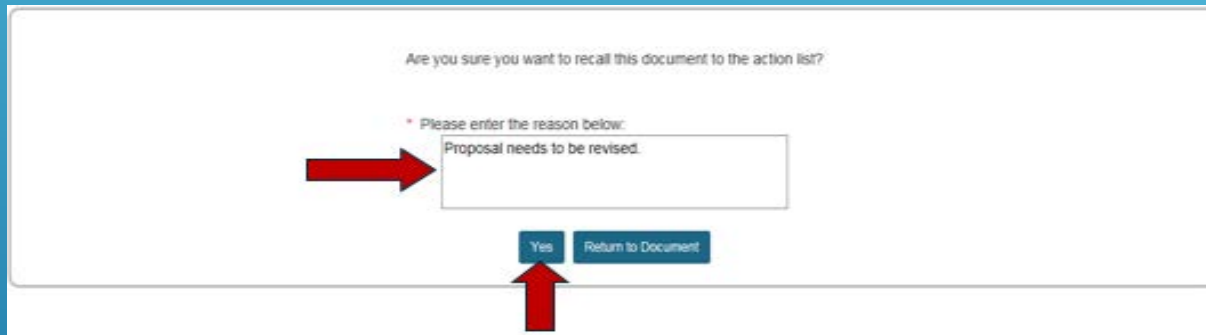


Rice Home KC Home Documentation Helpdesk					Currently signed in as: gerrard		
APP	4117	Proposal Development Document	QA AD test submit S; Proposal No: 118; PI: Andrew J. Gerrard; Sponsor: US NIH; Due Date: 10/31/2016	ENROUTE	12:59 PM 10/29/2015		

- 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.



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:					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		
	FY1	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

Go Giants!!!!

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	
show	COMPLETED	Bozza, Thomas J.		03:36 PM 10/16/2015	
show	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"/> 	



- 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

Ad Hoc Recipients

Person Requests:

* Action Requested	* Person	Actions
APPROVE	whitman Gerald Whitman	Add

Ad Hoc Group Requests:

* Action Requested	* Namespace Code	* Name	Actions
APPROVE			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, Mengchu	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?

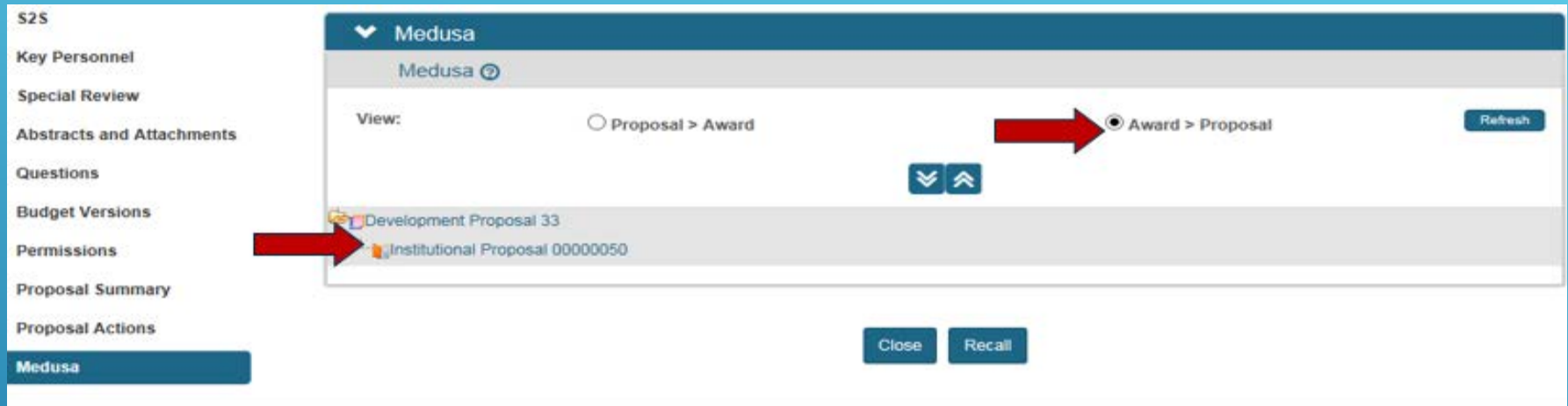
Yes No

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

S	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:**

Account: **Activity Type:** Research

NSF Code: **Notice of Opp:**

Sponsor: 31000253 US NIH

Prime Sponsor:

	Initial Period	Total Period
Requested Start Date:	07/01/2016	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 **Units**

Mengchu Zhou(Principal Investigator) 251000 : Electrical and Computer Engineering(Lead Unit)

Xuan Liu 251000 : Electrical and Computer Engineering

Cost Sharing ☐ **Unrecovered F&A** ☐ **Special Review** ☐

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 (selected tab)

Document Overview

- * Description : Generated by Dev Proposal 33 Explanation :
- Organization Document Number :

Institutional Proposal

Institutional Proposal (selected sub-tab)

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 screenshot shows the 'Development Proposal 33' details screen. At the top, there's a header with 'Development Proposal 33'. Below the header, there's a 'Development Proposal 33' section. In this section, there are two buttons: 'Open Proposal' and 'Notes'. A red arrow points to the 'Open Proposal' button. Below the buttons, there's a form with various fields. The fields are arranged in two columns. The left column contains: 'Proposal No: 33', 'Lead Unit: 251000:Electrical and Computer Engineering', 'Start Date: 07/01/2016', 'Title: TJB Proposal 8-20-15', 'Proposal Type: New', 'NSF Code:', 'Sponsor: 31000253 US NIH', 'Prime Sponsor:', 'Sponsor Proposal No:', 'Program Title:', 'Notice of Opportunity:', and 'Attachments: Complete'. The right column contains: 'Status: Approval Pending - Submitted', 'End Date: 06/30/2018', 'Activity Type: Research', 'Program No: PA-C-R01', and 'Budget: Complete'. At the bottom, there's a table with two columns: 'Investigators' and 'Units'. The table has two rows: 'Mengchu Zhou(Principal Investigator)' and 'Xuan Liu'. The 'Units' column for both rows is '251000 : Electrical and Computer Engineering(Lead Unit)' and '251000 : Electrical and Computer Engineering' respectively.


- 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