December 18, 2019
Research Administration Forum

Agenda

- UAccess Research (UAR) Tips & Tricks
  - Medusa, various IDs, searches, Q&A
- UAccess Financials Tips & Tricks
  - Financial Balance lookups
  - Financial Account inquiries
  - Related Analytics inquiries
- RA Forum Box folder - how to upload
  - Please upload and share your favorite tools
- Open Q&A and office hours

UAR – Medusa link from search results

UAccess Research

Logged in User:mundts logout

RESEARCHER UNIT CENTRAL ADMIN MAINTENANCE SYSTEM ADMIN

action list doc search analytics

Development Proposal Lookup

Main

* required field

Proposal Number:	
Proposal Type:	select
Proposal State:	select
Project Title:	
Proposal Person Full Name:	
Sponsor Deadline Date From:	
Sponsor Deadline Date To:	
Sponsor Code:	
Sponsor Name:	
Lead Unit:	
Lead Unit Name:	
Award ID:	
Grants.gov Opportunity:	
Hierarchy Status:	
Proposal Document Number:	132765

search clear cancel

^hide

Opens to Proposal Summary tab in Proposal Development

One item retrieved.

Actions	Proposal Number	Proposal Type	Proposal State	Project Title	Sponsor Code	Sponsor Name	Principal Investigator	Lead Unit	Lead Unit Name	Sponsor Deadline Date	Award ID	Grants.gov Opportunity	Hierarchy Status	Proposal Document Number
edit view copy medusa	0751	New	Approved and Submitted	Intense physiotherapies to improve function in young children with cer...	010806	National Institutes of Health	Burris R Duncan	4205	Health Promotion Sciences	06/05/2013			Not in a hierarchy	132765

Export options: CSV | spreadsheet | XML

UAR – Why "Medusa"?

Proposal Development

(outgoing) Subaward

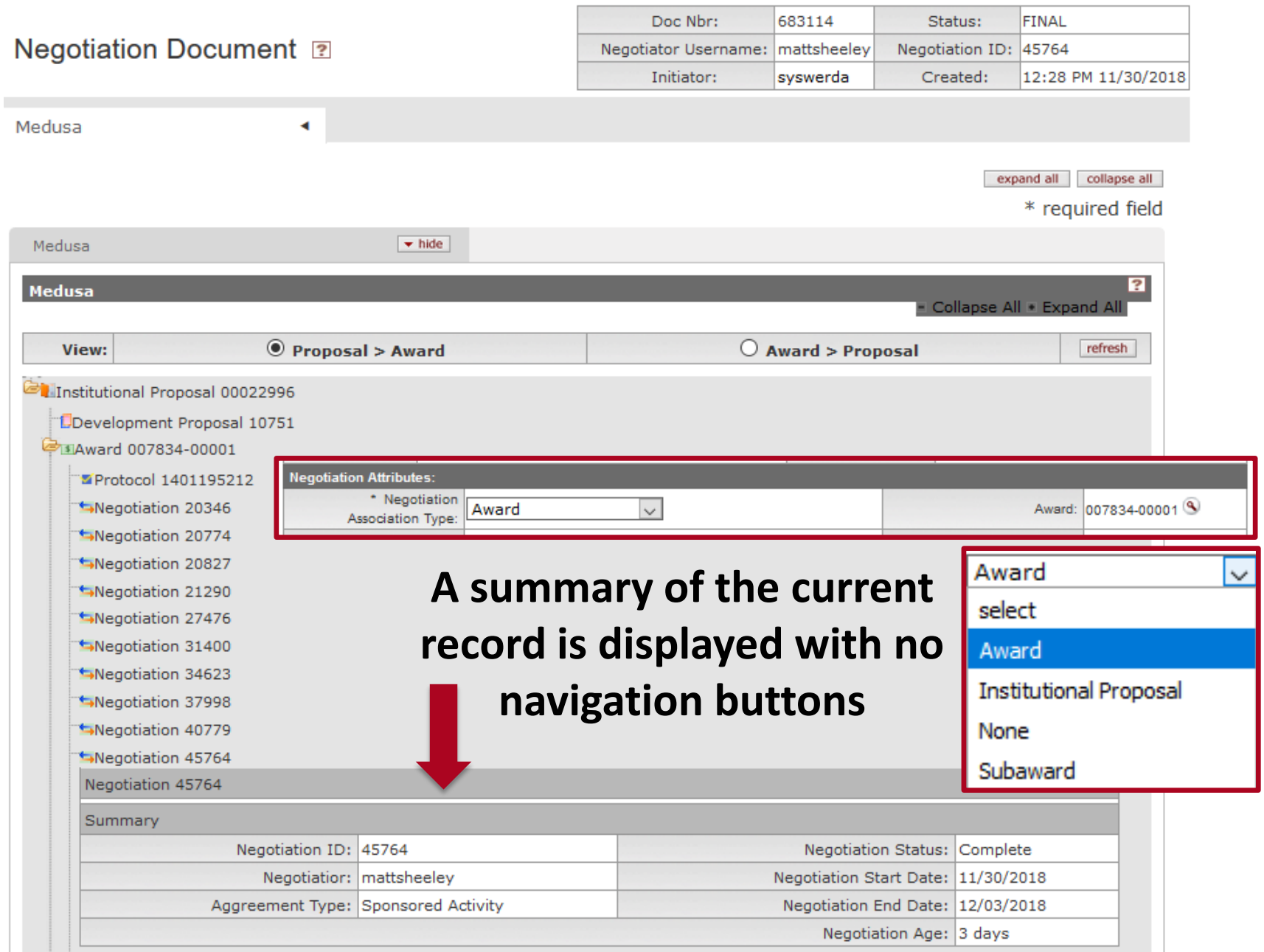
Institutional Proposal

IRB Protocol

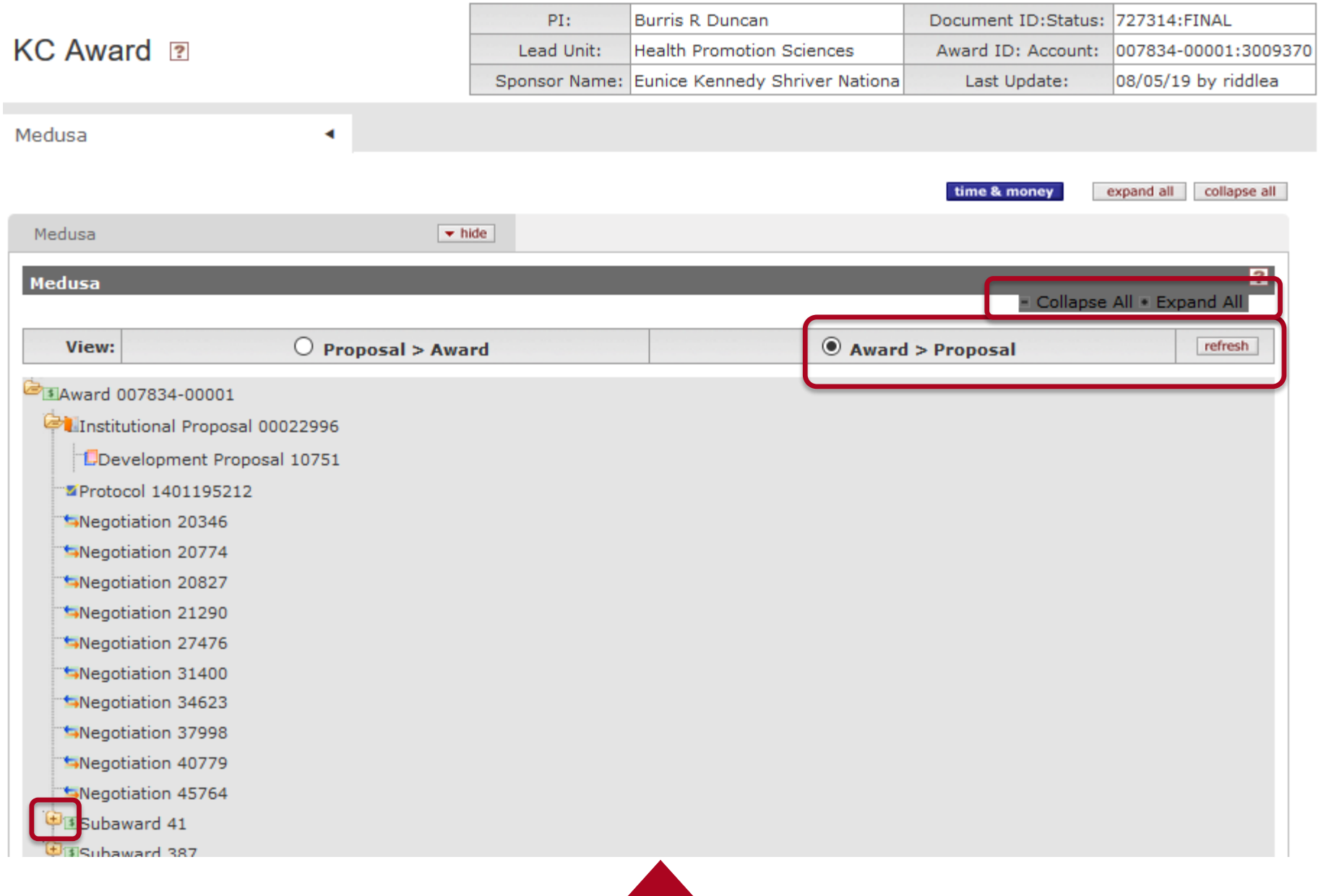
Negotiation

Award

UAR – Medusa (default view Proposal > Award)



UAR – Medusa (Award > Proposal 'refresh)



UAR – Medusa, jump to PD

Medusa

Collapse All • Expand All

View:	○ Proposal > Award	◉ Award > Proposal	refresh

Award 007834-00001

Institutional Proposal 00022996

Development Proposal 10751

Opens Abstracts and Attachments in another browser tab, Notes panel

Development Proposal 10751			
open proposal notes			
Proposal No:	10751	Status:	Approved and Submitted
Lead Unit:	4205:Health Promotion Sciences		
Start Date:	04/01/2014	End Date:	03/31/2019
Title:	Intense physiotherapies to improve function in young children with cerebral palsy		
Proposal Type:	New		
NSF Code:	F.04: Other - Life Sciences		
Sponsor:	010806 National Institutes of Health		
Prime Sponsor:			
Sponsor Proposal No:	PAR-11-260	Activity Type:	Research
Program Title:			
Notice of Opportunity:		Program No:	
Attachments:	Complete	Budget:	Complete
Investigators		Units	
Burris R Duncan (Principal Investigator)		4205 : Health Promotion Sciences (Lead Unit)	
Theodore P Trouard		0701 : Medicine Administration 2328 : Biomedical Engineering	
Chengcheng Hu			

Protocol 1401195212

UAR – Medusa, jump to IP Notes

Medusa

Collapse All • Expand All

View:	○ Proposal > Award	◉ Award > Proposal	refresh

Award 007834-00001

Institutional Proposal 00022996

Opens Inst Prop Notes and Attachments panel (signed submission documents)

Institutional Proposal 00022996

open proposal | notes

Proposal No.	Title		Status
00022996	Intense physiotherapies to improve function in young children with cerebral palsy		Funded
Proposal Type:	New	Sponsor Prpsl No:	PAR-11-260
Account:		Activity Type:	Research
NSF Code:	F.04: Other - Life Sciences	Notice of Opp:	
Sponsor:	010806 National Institutes of Health		
Prime Sponsor:			

	Initial Period	Total Period
Requested Start Date:	04/01/2014	04/01/2014
Requested End Date:	03/31/2015	03/31/2019
Total Direct Cost:	$393,822.00	$2,315,777.00
Total F&A Cost:	$100,277.00	$379,591.00
Total All Cost:	$494,099.00	$2,695,368.00

Cost Sharing	☐
Unrecovered F&A	☐
Special Review	☑

Investigators	Units
Burris R Duncan (Principal Investigator)	4205 : Health Promotion Sciences (Lead Unit)
Theodore P Trouard	0701 : Medicine Administration 2328 : Biomedical Engineering
Chengcheng Hu	

Development Proposal 10751

UAR – Medusa, jump to Award Attachments

Medusa

- Collapse All • Expand All

View:	Proposal > Award	Award > Proposal	refresh

Institutional Proposal 00022996

Development Proposal 10751

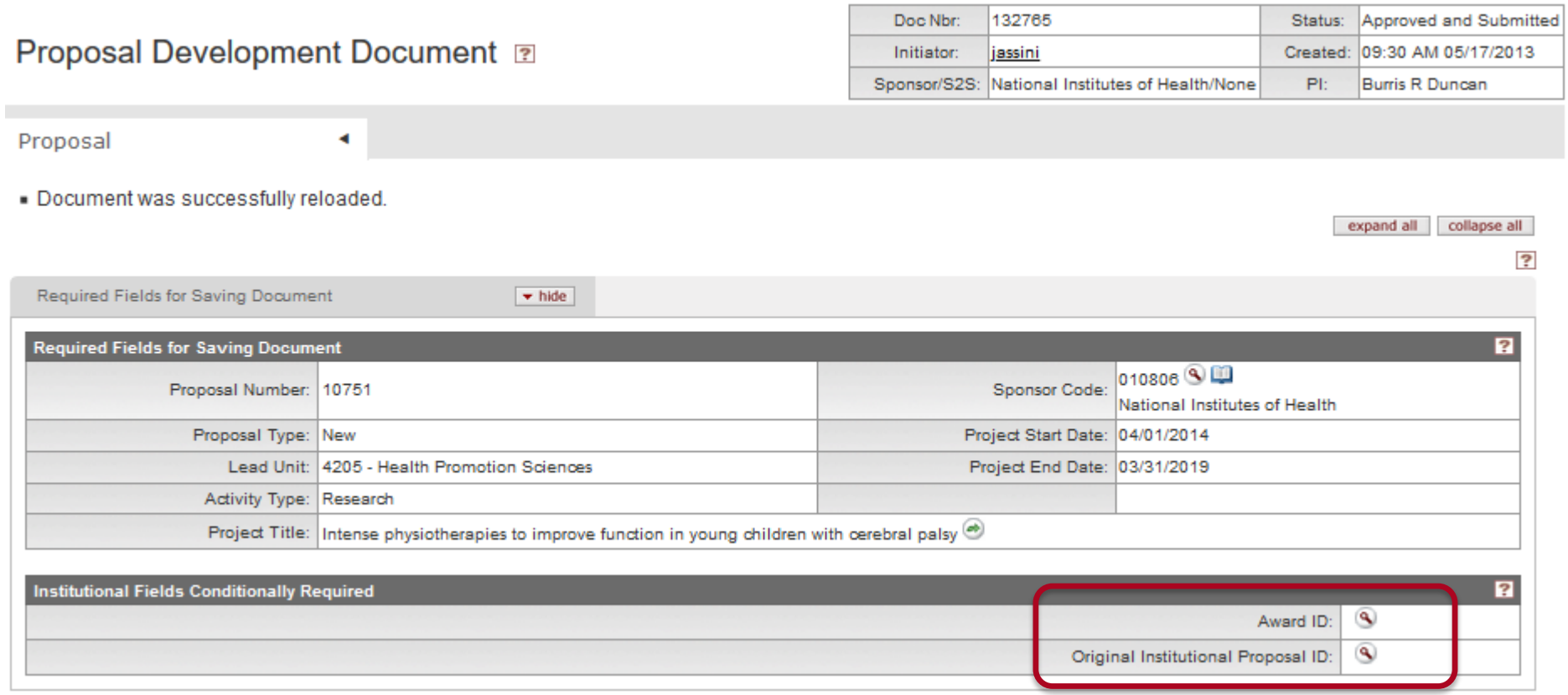
Award 007834-00001

Opens Award Comments, Notes & Attachments panel (fully executed award documents)

Award 007834-00001			
open award · notes · hierarchy actions			
Summary			
Award ID:	007834-00001	Award Type:	Grant
Sponsor Award ID:	5R01HD079498-05	Activity Type:	Research
Account ID:	3009370	Account Type:	None Selected
Award Status:	Active		
Title:	Intense Physiotherapies to Improve Function in Young Children with Cerebral Palsy		
Dates & Amounts			
Sponsor:	010791 Eunice Kennedy Shriver National Institute of Child Health and Human Development		
Project Start Date:	05/05/2014	Obligation Start Date:	11/01/2018
Project End Date:	10/31/2020	Obligation End Date:	10/31/2020
Anticipated Cumulative:	$2,219,573.00	Obligated Cumulative:	$2,219,573.00
Award Details Recorded			
Approved Subaward?	No	Payment Schedule?	No
Approved Equipment?	No	Sponsor Funding Transferred?	No
Approved Foreign Travel?	No	Cost Share?	No
F&A?	Yes		
Investigators			
Investigators		Units	

UAR – Prop Dev Links to IP or Award

- Proposal Development generates an Institutional Proposal as of 'submit to sponsor'
- IPs with *Pending* status appear in Medusa if they are linked to an **Award ID** or **Original Institutional Proposal ID**



Proposal Development Document

Doc Nbr:	132765	Status:	Approved and Submitted
Initiator:	jassini	Created:	09:30 AM 05/17/2013
Sponsor/S2S:	National Institutes of Health/None	PI:	Burris R Duncan

Proposal

- Document was successfully reloaded.

expand all | collapse all

Required Fields for Saving Document — hide

Required Fields for Saving Document

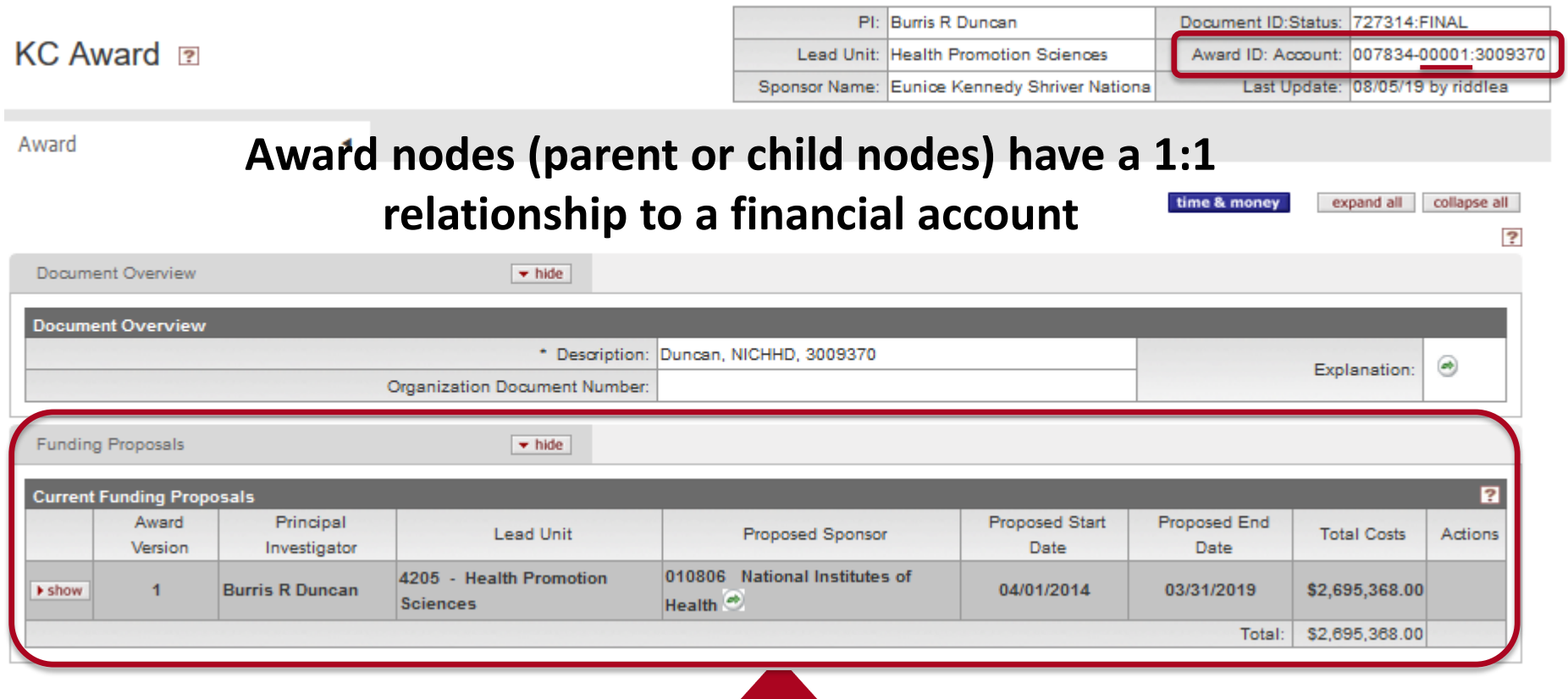
Proposal Number:	10751	Sponsor Code:	010806 National Institutes of Health
Proposal Type:	New	Project Start Date:	04/01/2014
Lead Unit:	4205 - Health Promotion Sciences	Project End Date:	03/31/2019
Activity Type:	Research		
Project Title:	Intense physiotherapies to improve function in young children with cerebral palsy		

Institutional Fields Conditionally Required

Award ID:	
Original Institutional Proposal ID:	

UAR – Proposal / Award Links

- **Funding Proposals** provide the link between an Award and a *Funded* IP
- All IPs are linked to the "root" or "parent" Award node of the hierarchy
  (parent ID ends with -00001)



KC Award

PI:	Burris R Duncan	Document ID:Status:	727314:FINAL
Lead Unit:	Health Promotion Sciences	Award ID: Account:	007834-00001:3009370
Sponsor Name:	Eunice Kennedy Shriver Nationa	Last Update:	08/05/19 by riddlea

Award

Award nodes (parent or child nodes) have a 1:1 relationship to a financial account

time & money | expand all | collapse all

Document Overview — hide

Document Overview

* Description:	Duncan, NICHHD, 3009370	Explanation:	
Organization Document Number:			

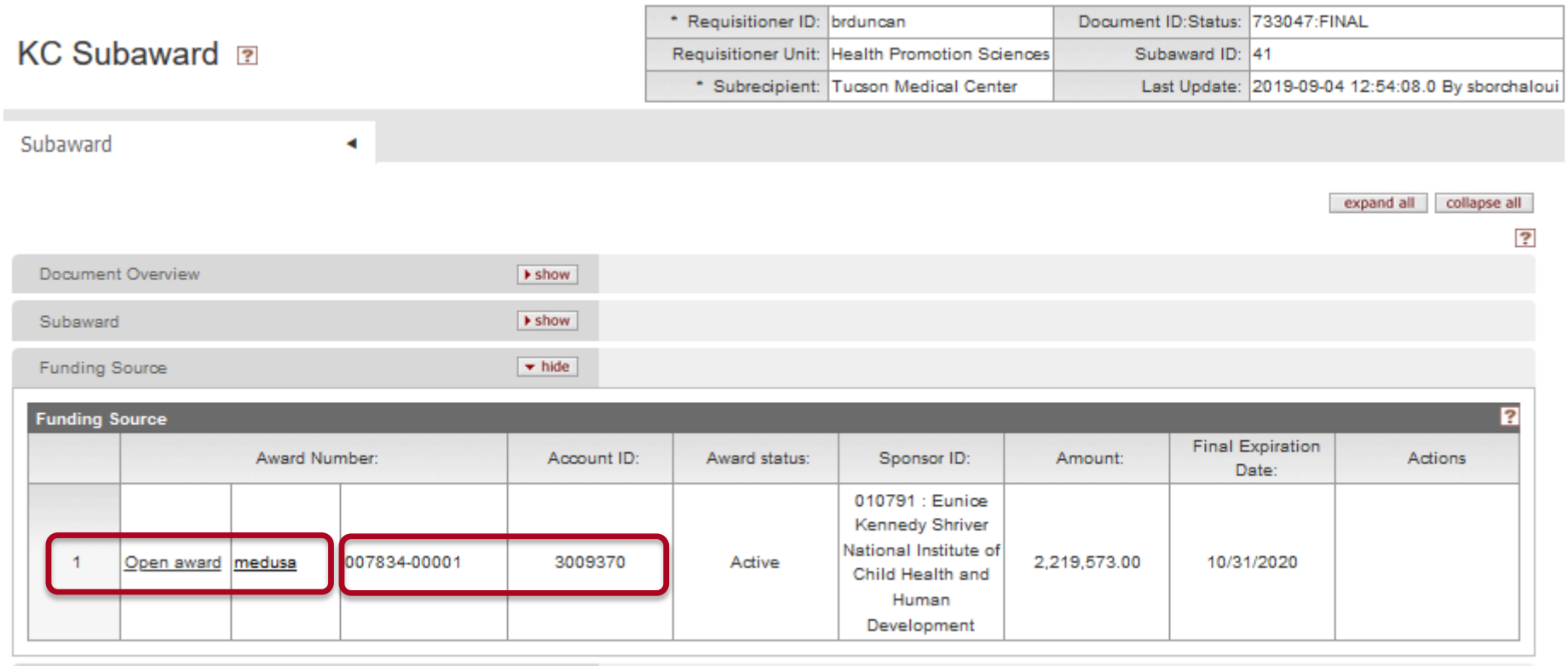
Funding Proposals — hide

Current Funding Proposals

	Award Version	Principal Investigator	Lead Unit	Proposed Sponsor	Proposed Start Date	Proposed End Date	Total Costs	Actions
show	1	Burris R Duncan	4205 - Health Promotion Sciences	010806 National Institutes of Health	04/01/2014	03/31/2019	$2,695,368.00	
						Total:	$2,695,368.00	

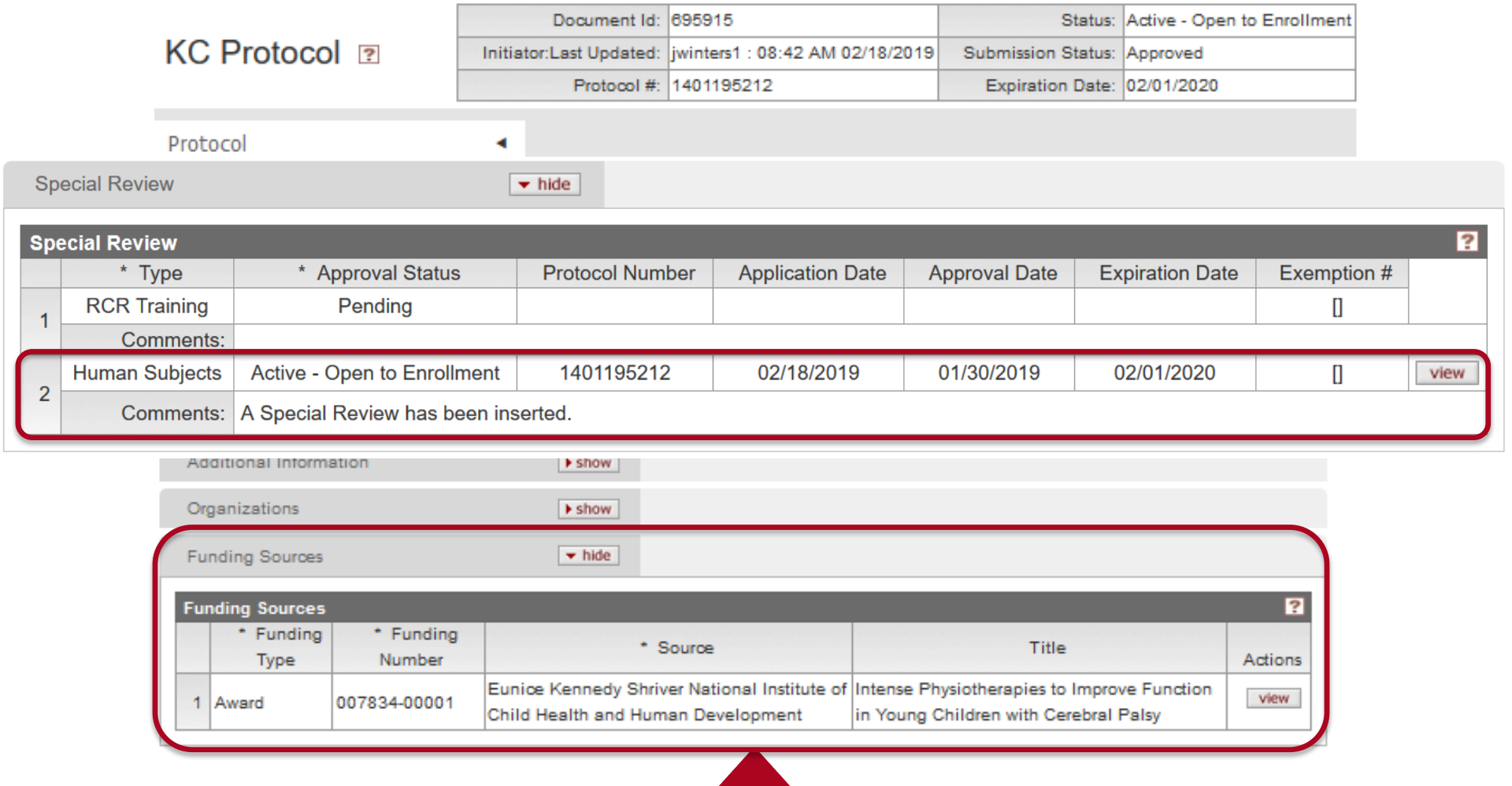
UAR – Award / Subaward Links

- **Funding Source** links Awards in Subawards
- Additional navigation actions are also available



UAR – IRB Links

- IRB Human Subject Protocols are linked via the **Special Review** tab in Prop Dev, IP or Award
- **Funding Sources** display a link in the Protocol



KC Protocol

Document Id:	695915	Status:	Active - Open to Enrollment
Initiator:Last Updated:	jwinters1 : 08:42 AM 02/18/2019	Submission Status:	Approved
Protocol #:	1401195212	Expiration Date:	02/01/2020

Protocol

Special Review — hide

Special Review

	* Type	* Approval Status	Protocol Number	Application Date	Approval Date	Expiration Date	Exemption #	
1	RCR Training	Pending					[]	
	Comments:							
2	Human Subjects	Active - Open to Enrollment	1401195212	02/18/2019	01/30/2019	02/01/2020	[]	view
	Comments:	A Special Review has been inserted.						

Additional Information — show

Organizations — show

Funding Sources — hide

Funding Sources

	* Funding Type	* Funding Number	* Source	Title	Actions
1	Award	007834-00001	Eunice Kennedy Shriver National Institute of Child Health and Human Development	Intense Physiotherapies to Improve Function in Young Children with Cerebral Palsy	view

UAR – Common Identifiers

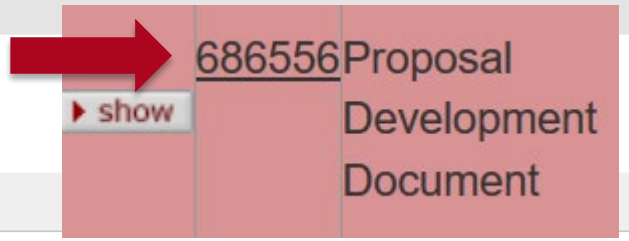
- **Proposal Development**: usually a UAR doc number
  - Always visible in Prop Dev
  - Action List hyperlink

Proposal Development Document

Doc Nbr:	132765	Status:	Approved and Submitted
Initiator:	jassini	Created:	09:30 AM 05/17/2013
Sponsor/S2S:	National Institutes of Health/None	PI:	Burris R Duncan

Proposal

Example of an Action List link



expand all collapse all

Required Fields for Saving Document hide

Required Fields for Saving Document

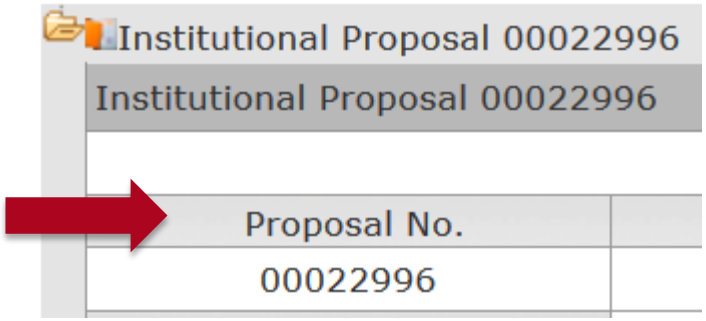
Proposal Number:	10751	Sponsor Code:	010806 National Institutes of Health

- Proposal Summary link from a lookup and from the Proposal Routing Dashboard

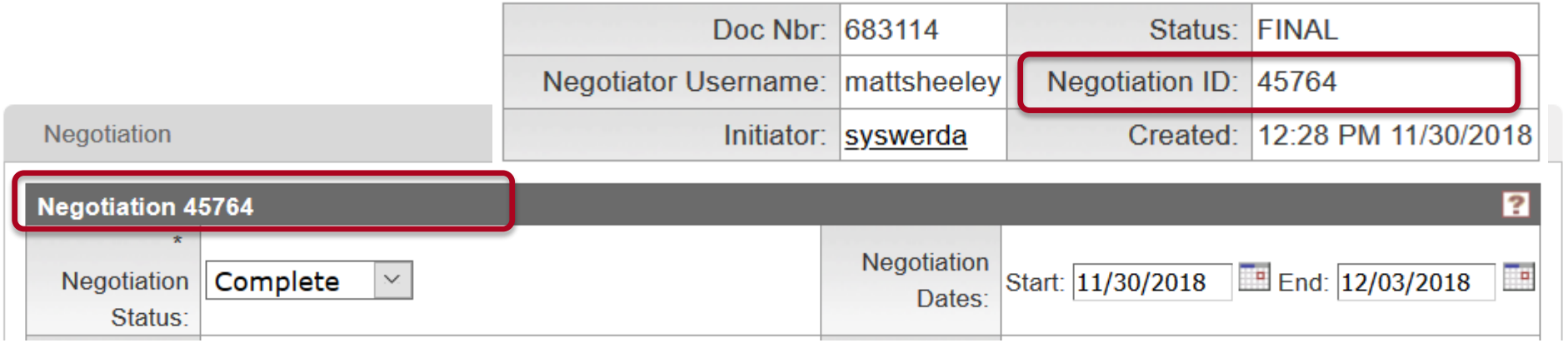
Actions	Proposal Number	Proposal Type	Proposal State	Project Title	Sponsor Code	Sponsor Name	Principal Investigator	Lead Unit	Lead Unit Name	Sponsor Deadline Date	Award ID	Grants.gov Opportunity	Hierarchy Status	Proposal Document Number
edit view copy medusa	10751	New	Approved and Submitted	Intense physiotherapies to improve function in young children with cer...	010806	National Institutes of Health	Burris R Duncan	4205	Health Promotion Sciences	06/05/2013			Not in a hierarchy	132765

UAR – Common Identifiers

- **Institutional Proposal**: the "proposal number" is system-generated and sequential for IPs (no logic in the number)



- **Negotiation**: aka ***NLID*** or ***NID***, *system-generated and sequential for negotiations*



  - Trivia: UAR negotiation numbers started at ~20000, picking up where our old SPINS *Contract Log* numbers, then the interim *Negotiation Log* numbers left off at UAR implementation in FY 2011

UAR – Common Identifiers

- **Award**: system-generated when with the first award 'save' action.

Award "family" number - Award node

PI:	Burris R Duncan	Document ID:Status:	727314:FINAL
Lead Unit:	Health Promotion Sciences	Award ID: Account:	007834-00001:3009370
Sponsor Name:	Eunice Kennedy Shriver Nationa	Last Update:	08/05/19 by riddlea

Details & Dates hide

Details and Dates view history

hide **Current Action**

Transaction Type:	Notice Date:	Comments:
No Cost Extension		Internal NCE through 10/31/2020

hide **Institution**

Award ID:	007834-00001	Lead Unit ID:	4205 - Health Promotion Sciences
Version:	15	Account Type:	
Award Status:	Active	Activity Type:	Research
Account ID:	3009370	Award Type:	Grant
Award Title:	Intense Physiotherapies to Improve Function in Young Children with Cerebral Palsy		

UAR – Wildcards and Operators in Searches

Operator	Name	Data Type(s)
*, %, ?	Wildcard	String
|	Or	All
&&	And	All
>	Greater than	String, number, date
<	Less than	
>=	Greater than or equal to	
<=	Less than or equal to	
..	Greater than or equal to and less than	

- * will match any number of characters
- ? matches one character
- All operators except .. should be before date values.
- Operator .. should separate date values

UAR – SPCS Staff Picks, Favorite Searches

- Award
  - Award ID: *-00001, Status: Active, Sponsor or PI: firstname*surname
- Negotiation
  - Account ID, Status: *In Progress*
- Maintenance main menu, Unit Administrator
  - Proposal approvers at the lead unit pre-approval, department or college levels
  - Unit Number: 0112|2412|1512, Unit Administrator Type Code: 16 (for all SNRE department approvers)
  - Unit Number: EDUC (for all college level approvers)
- Detailed doc search
  - Document Type: AwardDocument, Date Created From: 1/1/00, Title: *3009370*
- Fan Favorites? Stump the presenter?

Financial Balance Inquires for Sponsored Accounts

- Available Balances
  - Useful for viewing object code ITD data
- Balances by Consolidation
  - Finding balances by summary level code and overall balance
- Account Status (Current Funds)
  - Quick view of labor costs ITD
- Labor Ledger View
  - Quick view by emplID of salary costs
  - A2 vs AC balances

F&A Calculation

- Take the total
  - (Example $1,000)
- Divide it by 1.X, with the X as the F&A rate.
  - Example (1.535)
- $1,000 / 1.535 = 651.46

F&A Calculation with ERE

- $1,000 total to move
- F&A is 53.5%
- ERE is 31.4%

- $1,000 / 1.535 = $651.46 (salary and ere)
- $651.46 / 1.314 = $495.78 (salary that goes into the SET)

Account Inquires in Financials

- Indirect cost F&A
  - C&G tab in account drill down screen
- Financials Expiration Dates
  - Should match obligation end dates, except when extended for a backstop or transaction processing for AP after expiration
  - Use the UAR obligated and anticipated dates for the best data

Analytics Financials

- PEL with SET
  - A2 versus AC
- Sponsored Dashboards
- Creating a prompted link for sharing a filtered dashboard

Future Forum Topics?

- Suggest Future forum topics
  sponsor@email.arizona.edu
- Present a topic
  - Share research administration tools (reports, agents, etc.), lessons learned
  - Tips & tricks, coming changes, conferences