SIMS Web-Based Data Entry Manual For OSP Users

SIMSreports
And
SIMS*budgets*

Contents

SIMS Documentation - Organization

Overview:	This document is intended for OSP staff and users in other offices that have the ability to do data input. It assumes that you have reviewed the SIMS*reports* Users Manual and available SIMS*budgets* documentation. Please have your computer set appropriately as outlined in that document. This document only addresses input procedures; other SIMS*reports and* SIMS*budgets* features are outlined in the User's Manual and other documentation. **NOTE: Note that what was referred to just "SIMS" previous will now be referred to as SIMS*reports*.** Although there are several ways to access Proposal, Negotiation, and Award managers in SIMS, this document will access these modules from the log-on page. Other ways to access these modules are outlined

Sections of the Manual

SIMS Navigation	This manual covers entering proposals via SIMS*budgets* and the four modules in SIMS*reports* that allow user input – Proposal Manager, Negotiation Manager, and Award Manager. List Maintenance Manager instructions will be included in another document.
SIMS*budgets*	SIMS*budgets* is the latest addition to the SIMS product. This program can be used by units/colleges to create budgets or just to enter PIAF data electronically for submission to OSP. Budget creation will not be covered in this manual since OSP staff will not typically use this functionality.
Proposal Manager	The Proposal Manager maintains a running log of all proposals that are submitted by Penn State. Proposal Manager is populated with information that is submitted through SIMS*budgets*. Proposal Manager information is then used to populate the negotiation manager when an award is received. The Basic functions of the Proposal Manager are: • To provide access to proposal information that can be sorted by PI, department, or college. • To access Faculty Credit information.
Negotiation Manager	The Negotiation Manager maintains a running log of all activities associated with the individual grant- and contract-related documents (including RFPs and non-financial) in a database that the research administrators can access using the Web. This reduces the need for phone and email communications between research administrators and negotiators in Sponsored Programs since status can be checked in SIMS*reports*. The Negotiation Manager fulfills two basic functions: • It permits negotiators in Sponsored Programs to maintain an electronic log of negotiation activities. • It provides access to project histories (for example, award records and amendments relevant to the subject negotiation). The Negotiation Manager accesses only those records for which awards have been received and have reached (or passed) the negotiation phase.
Award Manager	This is the last step in the award process in ***SIMS.*** This module allows the completion of data input to create the Statement of Award.

SIMS*budgets* – Navigation

Overview: This is an overview on how to navigate within SIMS*budgets*. More detailed information regarding functionality will be covered in later sections.

Logging In

Go to URL / Login

Using Firefox as your browser login to SIMS*reports* using your Penn State WebAccess Password and ID:

Access SIMS*budgets*

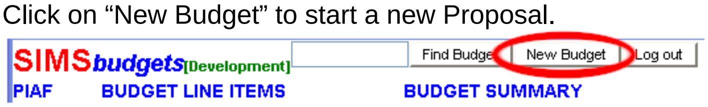
Access SIMS*budgets* from the applications menu. SIMS*budgets* will appear in a new browser window when selected.

Creating & Editing Budget Records

Create a New Budget

New Budget

Click on "New Budget" to start a new Proposal.



Save Proposal

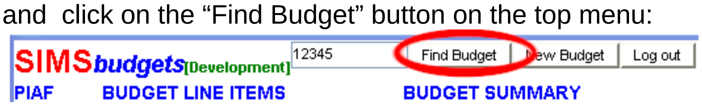
Save

Once you complete the PIAF Page 1 Page, save the proposal by clicking the "Save" button. The program will not let you save unless all necessary fields are complete.

Editing an Existing Proposal

Find Budget

To edit an existing budget, type in an existing OSP Number or College Proposal ID No. and click on the "Find Budget" button on the top menu:



Read-Only View

Page 1 of the budget will display in read only mode when you first access it. The fields will be grayed out and you will not be able to type in the fields:

Edit Proposal

Edit

Click on the "Edit" button to begin editing an existing proposal. Some fields may not be editable once you save the PIAF Page 1 and/or begin entering budget line items.

Edit-Mode View

When you begin a new proposal or start to edit an existing proposal, the data fields that are editable will have white (editable) or yellow (mandatory editable) background colors.

Menu and Field Types

Menu

Each budget has a menu that will allow the user to see in which portion of a record that they are currently working:

PIAF BUDGET LINE ITEMS BUDGET SUMMARY
PAGE 1 PAGE 2 PAGE 3 NOTES CENTERS PROGRAM AREAS KEYWORDS REPORTING PARAMETERS

The top line is the main header. If highlighted gray, the items underneath are sub-categories of that header.

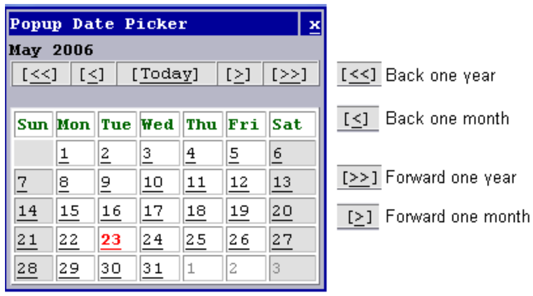
Text Input Fields

Input data into "text input fields" by typing free form text into the field. Text input fields will be white or yellow fields (when in edit mode) that do not have icons to the right of the field boxes.

Menu and Field Types (continued)

Data Picker Fields

The date picker (calendar icon) functionality displays a calendar that will allow date choice in the appropriate format. If "Today" is selected then the current date is inserted into the date field. Once you have the correct month and year on the calendar, click on the correct date to select it:



Note: If you decide that it is easier and quicker to type in the date, the format should be MM/DD/YYYY.

Lookup / Verify Fields

Lookup

Verified

"Lookup / Verify" Fields will look like normal text input fields, but will initially have a "lookup" icon to the right (magnifying class over a piece of paper). This icon is used to search the SIMS*budgets* database for values that may match the value that you have typed into the field. For instance if you type in the Last Name "Smith" in the Principle Investigator field, it will bring up a list of all people with the last name "Smith" from the database. Click on the correct entry to input it into the field.

Note: Once a value has been selected from the lookup function, the field is "Verified" (lookup icon becomes a red checked checkbox. This eliminates the possibility of users entering the same names, departments or sponsors with typographical errors or in different formats.

Radio Buttons

MTDC Total Amount TDC Other

If a field contains radio buttons, only one selection in the grouping can be made. For instance in F&A Basis, you must choose only one from MTDC, TDC, Total Amount and Other. Clicking on another radio button in the field will negate your original selection.

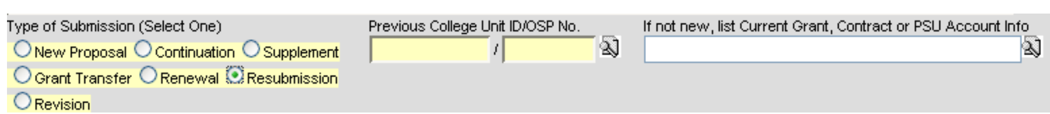
Check Box

Official Budget

If a field is a check box, it will either be checked or not checked. Usually if you see a group of check boxes together, they will function independently. Meaning each one can either be checked or unchecked regardless of each other. The only exception to this is the "Submitted by" field. Only one selection can have a check. If OSP is selected then College/Unit cannot be checked at the same time and vice versa.

Conditional Mandatory Fields

Some fields are only editable and/or mandatory based on your selections from other fields. For instance if you choose "New Proposal" for Type of Submission, then no other entry is needed and all the fields in the row remain inactive. However, if "Resubmission" is selected, then you must enter a previous College ID or OSP number in the next field.



Saving Data

Save

Update

After you enter data you can save the new information in your proposal by clicking "Save" if it is a new proposal or "Update" if you have changed information in an existing proposal. SIMS*budgets* will let you know if you have missed mandatory information or entered data in an incorrect format.

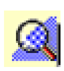
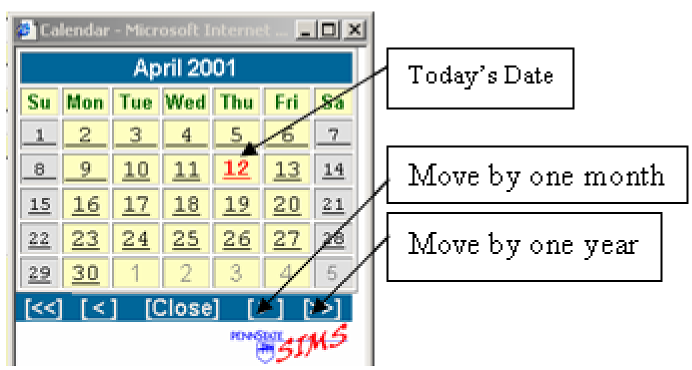
SIMS*reports* – Navigation

Overview:	This is an overview on how to navigate within SIMS*reports.*

Logging In

Go to URL / Login	 Using Firefox as your browser login to SIMS*reports* using your Penn State WebAccess Password and ID:

Icons

 **Read Only**	The “glasses” icon that will appear on the upper right hand corner of “Manager” windows indicates that the record is “Read Only”
 **Editable**	The “Pencil icon that will appear on the upper right hand corner of “Manager” windows indicates that the record is editable and data may be entered on the page in allowable fields.
 **Lookup**	The SIMS*reports* “Magnifying Glass” icon indicates that the field is a “lookup field”. When this icon is displayed in front of a field, click on it to find a correct entry for the field. For example, try typing in “Smith” and then clicking on the icon. A pop-up window will be displayed with a list of all faculty members with “smith” in their name along with their department affiliation.
 **Date Picker**	When this icon is displayed in front of an entry field, you can use the calendar feature to select dates. Click on the icon and a calendar will appear where you can click on the appropriate date for that field. The default is today’s date. Click the desired date you would like inserted. By clicking on the arrows on the bottom you can navigate the calendar ahead by a month or a year. Click close when the desired date is selected. 

Navigating Proposal Manager

Overview:

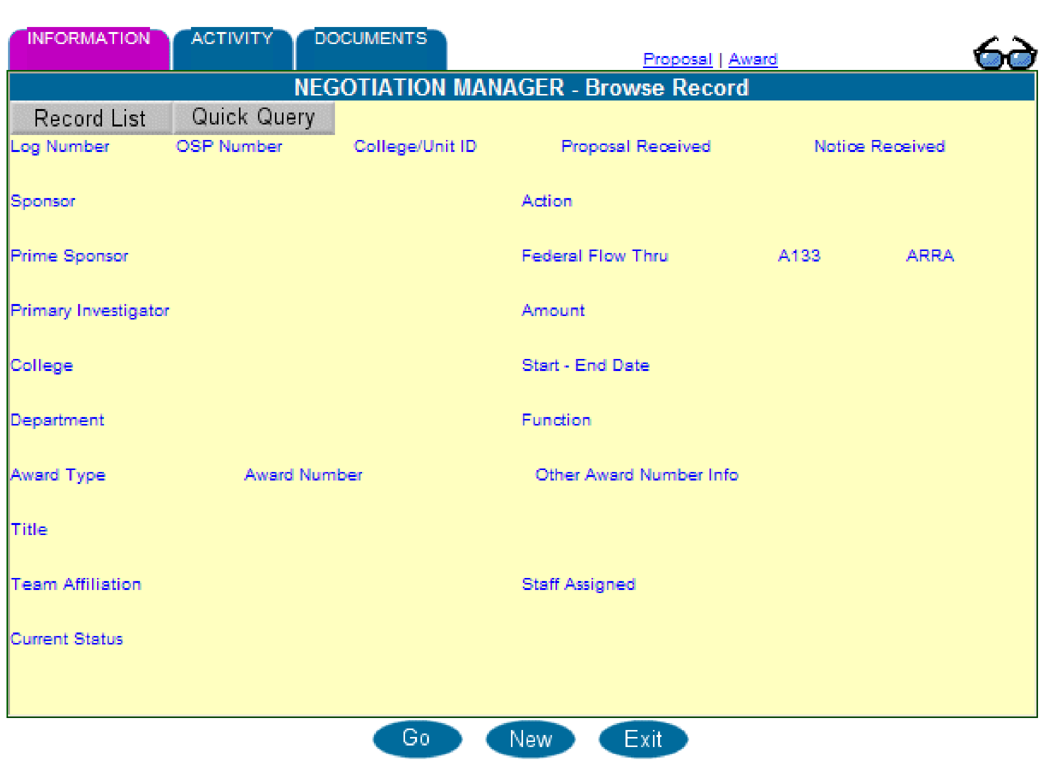
There are many ways to access Proposal Manager. It can be accessed from the applications menu, from other managers (negotiation and award modules) within SIMS*reports* and from SIMS*budgets*. This is an overview of various methods of accessing Proposal Manager

From the Applications Menu:

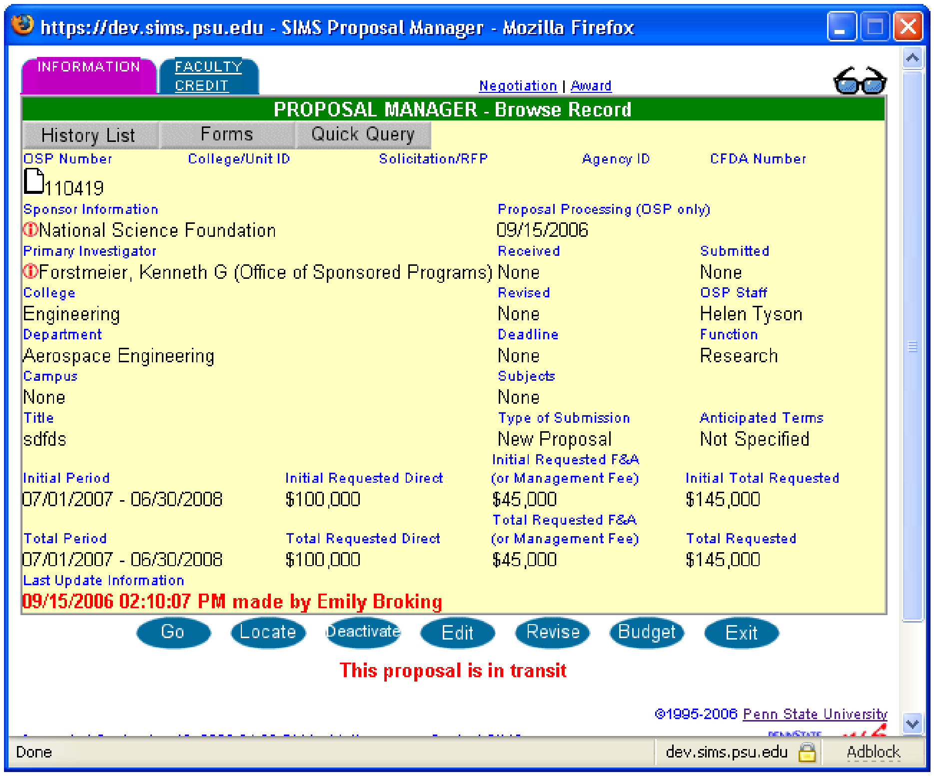
From the SIMS Welcome page, mouse over "Applications" to get menu selections. Select "Proposal Manager".

From Negotiation or Award Manager:

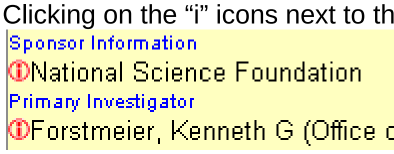
From the SIMS Negotiation Manager or Award Manager click on the blue "Proposal" link on the top right hand side of the manager window.



Components of Proposal Manager

<table>
<tr><td>Proposal Manager Record:</td><td>
</td></tr>
<tr><td>Proposal Status:</td><td>The status of the proposal will be indicated in red at the bottom of the proposal manager window. In the above example the proposal is in transit:

This proposal is in transit</td></tr>
<tr><td>Statement Icon:
</td><td>By clicking on the statement icon the user can access the particular statement regarding this proposal. A proposal statement is provided if it is not yet fully executed; once it is a fully executed award, an award statement is shown.</td></tr>
<tr><td>Quick Query</td><td>Quick Query allows the user to search for a different record.</td></tr>
<tr><td>Link to other Managers:
Negotiation | Award</td><td>If the proposal is in or has completed negotiations, navigation to Negotiation Manager can done by clicking the blue “Negotiation Manager” link in the upper right portion of the screen.

If the proposal has been fully executed, clicking on the blue “Award Manager” link in the upper right portion of the screen will navigate to the award manager screens.</td></tr>
<tr><td>Link to Fact Sheets:
</td><td>Clicking on the “i” icons next to the sponsor or PI’s name will link to Information Sheets.

</td></tr>
</table>

SIMS*budgets* - Entering a Proposal / PIAF Information

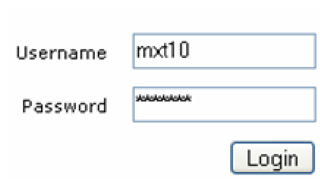
Overview:

SIMS*budgets* program is a tool to submit Proposal Budgets to OSP electronically. This is an overview on how to fill out the PIAF Page 1 for OSP Office Staff.

OSP staff will enter proposals through SIMS*budgets* when OSP is the submitting authority and the college or unit submits their PIAF to our office via hardcopy. This step is not necessary if the college or unit enters the proposal electronically via SIMS*budgets* themselves.

Logging In / Starting a New Proposal

Go to URL and Login:



Using Mozilla Firefox as your browser go to the SIMS web site: ***http://www.sims.psu.edu***

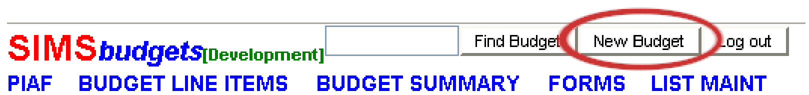
Login to SIMS using your WebAccess Username and Password. If you do not have an account email simsadmin@psu.edu for more information.

Applications Menu – Select SIMS*budgets*

Access SIMS*budgets* from the applications menu. SIMS*budgets* will appear in a new browser window when selected.

New Budget:

Click on New Budget to generate a blank "New Budget" Form.



Blank PIAF Page 1 Form

SIMSbudgets v.1.1.2 | Find Budget | New Budget | Log out

PIAF   BUDGET LINE ITEMS   BUDGET SUMMARY   GRANTS.gov   LIST MAINT   HELP

PAGE 1   PAGE 2   PAGE 3   NOTES   CENTERS   PROGRAM AREAS   KEYWORDS   REPORTING PARAMETERS

PROPOSAL INTERNAL APPROVAL FORM

Ready for new budget record

Cancel   Save

College Proposal ID No.   OSP No.   Budget Creation Date 08/11/2008   Official Budget   Create Budget   On Campus

INVESTIGATOR DATA

Principal Investigator

Project Correspondent

PI Notification Email

Department/Subunit (Consortium/Institute/Center etc)

College/Unit Notification Email

College/Unit

Project Location/Building Name:

PROPOSAL DATA

Type of Project

Research   Instruction   Outreach   Service (for Hershey use only)

Project Title

Type of Submission (Select One)

New Proposal   Continuation   Supplement

Grant Transfer   Renewal   Resubmission

Revision

Previous College Unit ID/OSP No. /

If not new, list Current Grant, Contract or PSU Account Info

SPONSOR DATA

Sponsor Name

Prime Sponsor

Program

Sponsor Address

City

State

ZIP Code

Country

Contact

Sponsor Protocol No.

CFDA No.

Submitted by

College/Unit

OSP

Number of Copies Sent or to be Sent:

OSP Instructions

Deadline

Yes

Mailing Date

Due in Hands of Sponsor

BUDGET DATA

Total Project Period

Begin

End

Number of Periods 0

Applicable F & A Rates or Management Fee; F & A Basis

% % N/A   MTDC   Total Amount   TDC   Other

Total Amount F&A Rate

"Other" F&A Basis

University Cost Sharing (Check all that apply)

Includes Committed* Cost Sharing

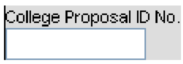
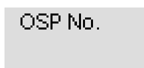
College/Unit is Providing Cost Sharing (Responsibility of College/Units)

Central is Providing Cost Sharing (Documentation of Commitment Attached)

*Committed Cost Sharing includes both mandatory (sponsor-required) cost sharing and voluntary cost sharing committed in the proposal (see RAG10)

REMARKS OR SPECIAL INSTRUCTIONS

Cancel   Save

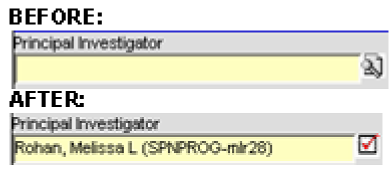
PIAF Page 1 - Ready for New Budget Record	
College Proposal ID Number: 	After clicking "New Budget" a blank "New Budget" Form will appear and the cursor location will default to the first available field which is "College Proposal ID Number". This is not a mandatory field. This number in the past has been used to identify the proposal within a Department/Subunit until an OSP unit has been assigned by the Office of Sponsored Programs (OSP). If you choose to utilize enter an alpha/numeric combination. SIMS*budgets* will automatically assign an OSP number to the proposal upon saving, so the College Proposal ID Number is no longer mandatory and/or necessary. The field has been left in place in case the Department/Subunit will continue using this field.
OSP No. 	When first creating a new budget you will note that there is a space labeled OSP No. with no field or point of entry. This number will be generated when you first save PIAF Page 1. You can note the number once it is generated.
Budget Creation Date: 	This field will be auto-populated with today's date. You can either change the date manually by typing in a date in the format MM/DD/YYYY or select a date from the date picker by clicking on the calendar. Once the date is inserted tab or click to the next field "Official Budget".
Official Budget: 	The default value when you create a new budget for this field is not checked. All proposals entered by OSP staff will be "Official". If you tabbed into this field either click on the box to check it or hit the space bar to insert a check mark.
Create Budget:  ***Keep checked to create Uncheck if not creating!**	The Create Budget field defaults to checked status when you create a new proposal within SIMS*budgets*. **OSP Staff Negotiators may create budgets. OSP Staff Assistants may not create budgets.**
On Campus:  **OR** 	The next field to complete is the "On Campus" checkbox. This field will default to checked status. Select the option that is applicable.

PIAF Page 1 – Investigator Data

Principle Investigator:

The first field to complete in the Investigator Data section is “Principle Investigator”. This field is mandatory and must be verified in the SIMS*budgets* database. To complete this field, type in a portion of the PI’s name and click on the lookup icon to match the string to one of the names in the database. If only one choice is available, it will automatically be inserted. Otherwise, a pop-up window will appear with either a list of possible name selections or a message that no matching name was found.

If you cannot find a PI name for your proposal, email simsadmin@psu.edu to request that it be added. We will ask you for all applicable information necessary to add the name and expedite the process to avoid inconvenience.



***Note the red check mark that appears next to the field. This indicates that the PI name has been verified and matches an existing name in the database.**

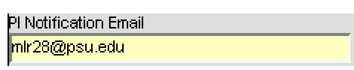
Project Correspondent:

After completing the “Principle Investigator” field, you will notice that the Project Correspondent Field is auto-populated with the exact same information. The reason for this is that the Project Correspondent is typically the same person as the Principle Investigator. This field is present for the rare cases where the roles are filled by two different people.

If you do need to add a different person, then highlight the name and hit delete on your keyboard. You can then complete the field in the exact same way as the “Principle Investigator” field.

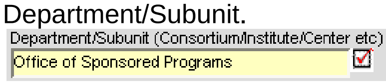
PI Notification Email:

This field is filled in with the email address associated with the name inputted into the “Principle Investigator” field. If the PI’s email is already contained in the SIMS*budgets* database, then the field will be auto-populated with the appropriate email address. If this is not the correct email address, you can delete the one provided and type in a new one. If no email address is available, then manually type in the correct email address.



Department / Subunit:

The department Subunit field should be filled in with the name of the Department or Subunit that is actually submitting the proposal. Type in part of the Department or Subunit name and click on the lookup icon to select and verify the Department/Subunit.



College/Unit Notification Email:

This field is filled in with the email address associated with the Department/Subunit inputted into the “Department/Subunit” field. If the email is already contained in the SIMS*budgets* database, then the field will be auto-populated with the appropriate email address. If this is not the correct email address, you can delete the one provided and type in a new one. If no email address is available, then manually type in the correct email address.

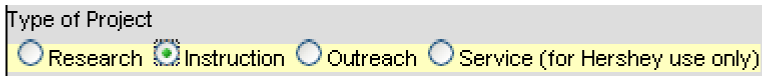
College/Unit:

The College/Unit is not an editable field. It will be auto-populated based on the selection that was made in Department/Subunit. Every Department/Subunit is automatically associated with the correct College/Unit. Any discrepancies can be reported by emailing simsadmin@psu.edu.

PIAF Page 1 – Proposal Data

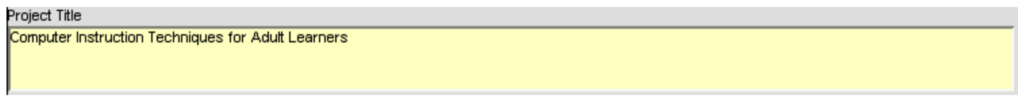
Type of Project:

The “Type of Project” can be designated by clicking on one of the radio buttons to the left of the appropriate project type. Only one selection is allowed:



Project Title:

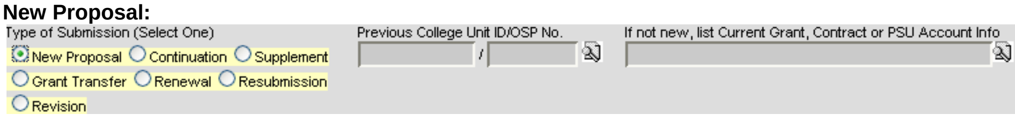
Type in the Title of the project into this field. This is a freeform text field that can have up to 200 characters.



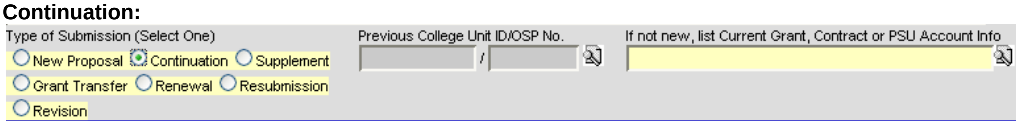
Type of Submission:

“Type of Submission” is used to designate whether the proposal is new or of another type. Only one selection is allowed. Click on the radio button to the left of the appropriate selection. If the submission type is “New” then no further information is required in the Proposal Data Section. However other information is required if the submission type is not new. See below for illustrations:

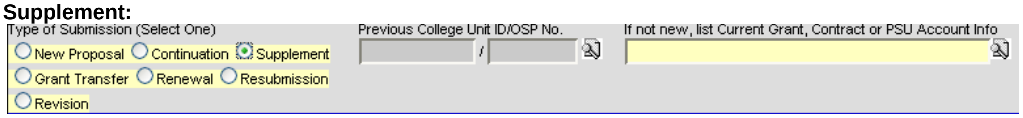
New Proposal:



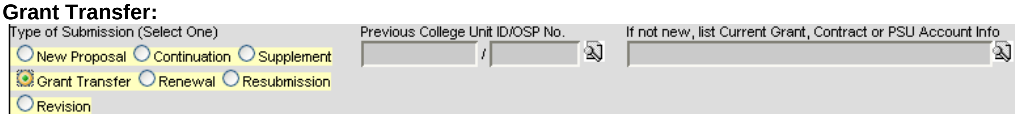
Continuation:



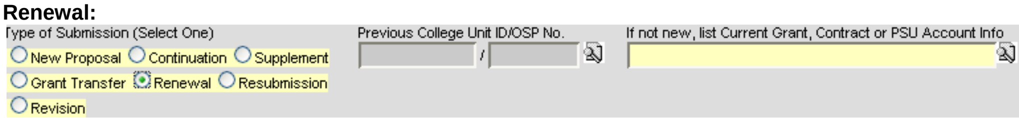
Supplement:



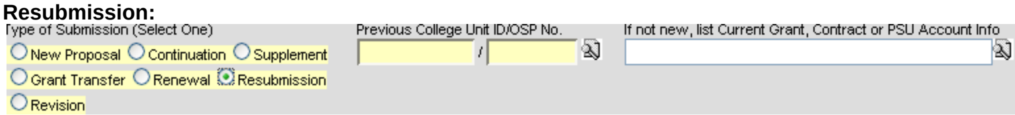
Grant Transfer:



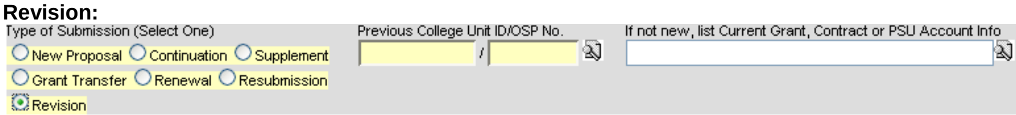
Renewal:

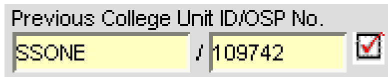
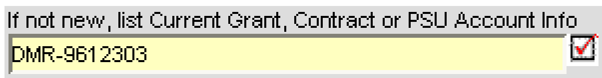


Resubmission:

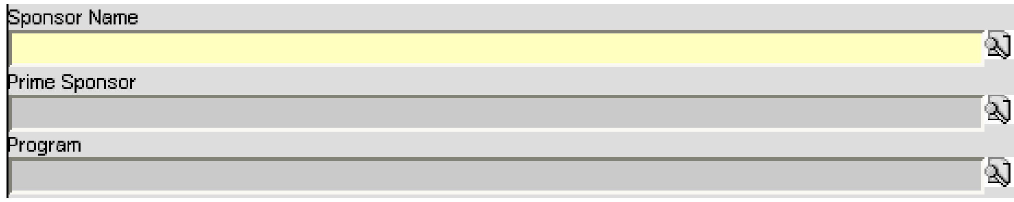
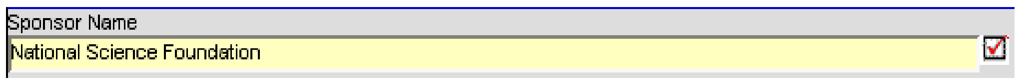


Revision:

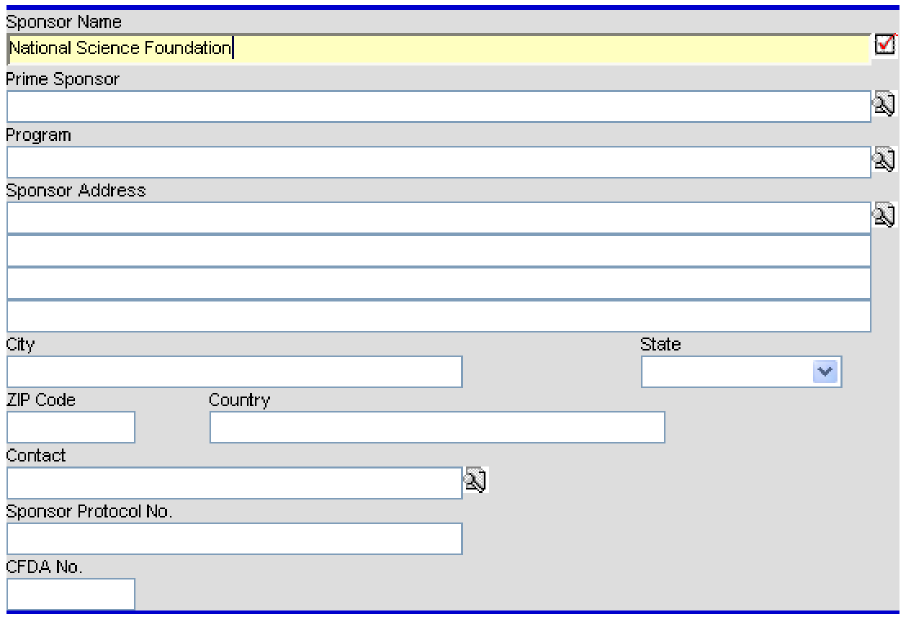


Previous College Unit ID / OSP No.	If this field is required, type in either a College Unit ID in the first field or an OSP number in the second field. Next, click on the lookup icon so that SIMS*budgets* will verify that this is a valid previous proposal. Once verified (red check mark in box icon will appear), the record will be linked with the previous proposal: 
If not new, list Current Grant, Contract or PSU Account Info	If this field is required, type in a valid previous grant, contract or other PSU account information. This field, when available and mandatory, must be verified (for linking). If not mandatory, free form text can be typed in without being verified. 

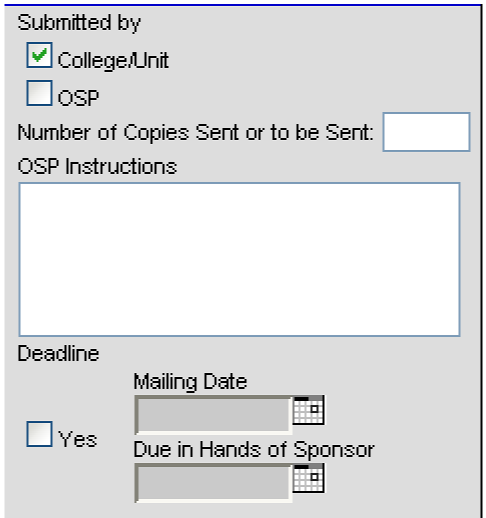
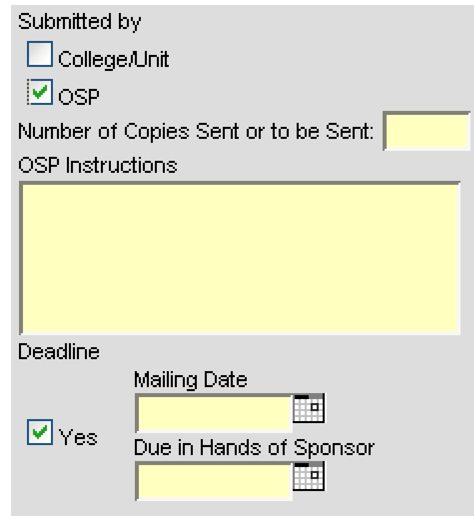
PIAF Page 1 – Sponsor Data

---------------------- **Sponsor Name** **----------------------** **Prime Sponsor** **----------------------** **Program** **----------------------**	Sponsor Name, Prime Sponsor and Program are fields that consist of the necessary information to completely identify a sponsor. Only the Sponsor Name, however, is Mandatory. Other Sponsor fields are not available unless the Sponsor Name is entered first. 
Sponsor Name:	The name of the Sponsor Name must be verified to match a Sponsor Name already in the SIMS*budgets* database. Type in a portion of the sponsor name and click on the lookup icon. See Login & Navigation instructions if you need more information on how to lookup and verify a field:  **NOTE: Lookup and verification ensures that Sponsor Names are all entered in the exact same way for accurate reporting later. For example, without verification, we could end up with some records with the sponsor as NSF and others as National Science Foundation.**
Prime Sponsor:	Once the Sponsor Name is selected and verified, the Prime Sponsor field becomes available for use (not mandatory, needs to be verified). This field would be used in cases where the Ultimate Sponsor (where the money coming from) is different than the Sponsor to whom we are actually submitting the proposal. This may be the case if Penn State is a subcontractor for a project for example. You use the lookup function to choose sponsors already in the SIMS*budgets* database.
Program:	The Program field only becomes available once the Sponsor Name field is completed (not mandatory and does not need to be verified). Some sponsors may have specific programs within their organizations that act as their own entity. You may type free form into this field or use the lookup function to choose from Programs that are already associated with the Sponsor you selected.
NOTE: Verifying Prime Sponsors & Programs	It is always recommended that you verify Prime Sponsors and Programs. This will ensure that names are consistent and make for more reliable reporting. If the Sponsor or Program you would like to use is not already in the SIMS*budgets* database, we recommend that you email simsadmin@psu.edu to have it added.

<table>
<tr><th colspan="2">PIAF Page 1 – Sponsor Data (continued)</th></tr>
<tr><td>Sponsor Address Fields:</td><td>Sponsor Address consists of three lines for the street address information, City, State, ZIP code and Country. There are also fields available for Contact Name and CFDA No. where applicable. All fields can be filled in manually with free-form text. However, if you use the lookup icon, you can choose from a selection of addresses that are already available for that Sponsor. If you choose from the lookup feature, all these fields will be automatically populated.



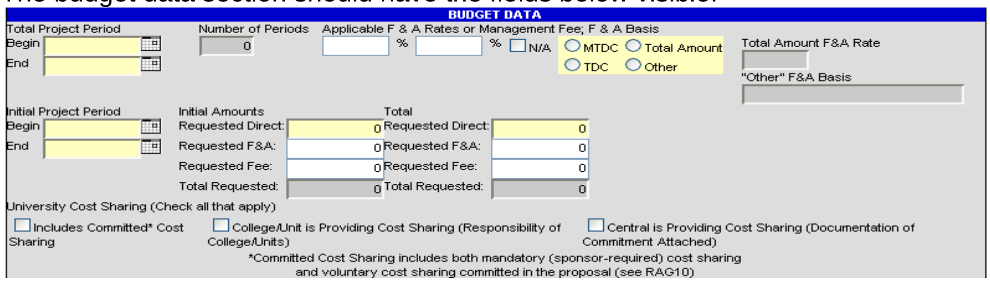
NOTE: The following address field instructions will assume that the information was not already populated. If you used the lookup feature and the fields are already filled in, skip the instructions.</td></tr>
<tr><td>Sponsor Address:</td><td>Type in up to three lines of street address manually if not already populated.</td></tr>
<tr><td>City:</td><td>Type in the City Name manually if not already populated.</td></tr>
<tr><td>State:</td><td>Choose a state from the drop-down menu if not already populated.</td></tr>
<tr><td>ZIP Code:</td><td>Type in a ZIP Code manually if not already populated.</td></tr>
<tr><td>Country:</td><td>This field will auto-populate with the value “United States” if a State is selected from the drop-down menu in the “State” field. If this is an international address and the State selection is not applicable, you can type in a Country Name manually.</td></tr>
<tr><td>Contact:</td><td>Choose a contact from the lookup menu. If appropriate contact name is not available, type in name.</td></tr>
<tr><td>Sponsor Protocol No.</td><td>Sponsor Protocol No. can be manually typed into the field.</td></tr>
<tr><td>CFDA No.</td><td>CFDA No. can be manually typed into the field.</td></tr>
</table>

PIAF Page 1 – Sponsor Data (continued)	
Submitted by: ***Not required to save Page 1 but <u>is</u> required to "Submit to OSP"**	This section identifies whether a proposal is being submitted by the College/Unit itself or if it is to be submitted by OSP. Although these fields are not mandatory to save the proposal, they are mandatory for actually submitting the proposal to OSP (porting the data into SIMS*reports*). Different fields in this section are available and/or are required depending on the selection you make:  The first screenshot shows Submitted By College/Unit. In this case the rest of the fields are optional. The second screenshot shows Submitted by OSP. If this selection is made, you must enter the information needed for OSP to be able to submit your proposal properly and on time.
Number of Copies Sent or to be Sent:	Type in the number of copies required to be sent to the Sponsor. This field is optional if no "Submitted by" selection is made or if College/Unit is checked.
OSP Instructions:	This field is only mandatory if "Submitted by" OSP is checked. The field is optional if no "Submitted by" selection is made or if College/Unit is checked.
Deadline:	This field does not have to be checked if no "Submitted by" selection is made or if College/Unit is selected. "Yes" must be checked if "Submitted by" OSP is checked. If "Yes" is checked, then either "Mailing Date" or "Due in Hands of Sponsor" must be filled in.
Mailing Date / Due in Hands of Sponsor:	These fields are dependent upon one another as to whether or not they are mandatory. If "Yes" is checked under deadline, then they both appear to be mandatory. This may be misleading. Only one or the other is actually required. If "Mailing Date" is populated with a date, the "Due in Hands of Sponsor" is no longer mandatory and vice versa. Note that although only one is required, both fields may be used in any case. Fill these fields in with either the Date Picker icon or by manually typing a date in the format MM/DD/YYYY.

PIAF Page 1 – Budget Data

Budget Data Fields

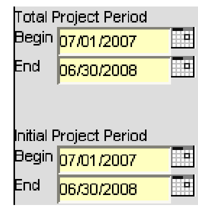
The budget data section should have the fields below visible:



*** NOTE: If you are missing the "Initial Project Period" and "Amount Fields" you may have forgotten to uncheck "Create Budget" at the top of the form.**

Total and Initial Project Period – Begin / End:

For the **Total** Project Period, the begin date is the day the entire project is proposed to begin. The end date specifies the last day of the last period of the total project life span.



The **Initial** Project Period is to be specified in these fields. This begin date is the first day of Period 1. The end date specifies the last day of the first period.

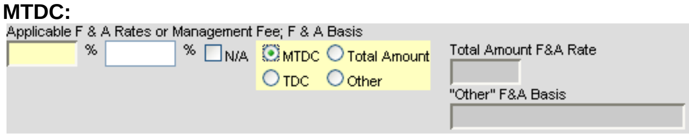
***TIP: If your project only has one (1) period, then fill in the Initial Project Period dates first. This will auto-populate the Total Project Period dates automatically.**

F&A Rate and F&A Basis:

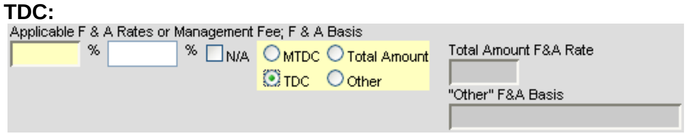
The fields that relate to F&A are combined in this section, since they are very much dependent on each other.

Although the next fields available when tabbing through are "Applicable F & A Rates or Management Fee", do not fill these out. First fill out the F & A Basis to see which of these fields become editable and/or mandatory. Here are the different scenarios to choose from (N/A, MTDC, TDC, Total Amount, Other):

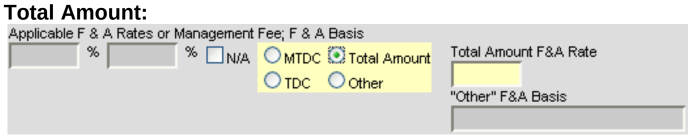
MTDC:



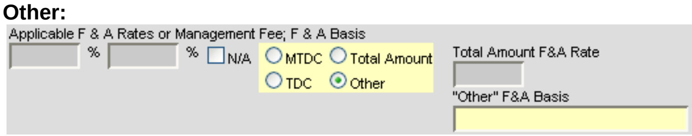
TDC:



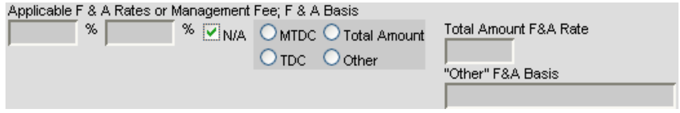
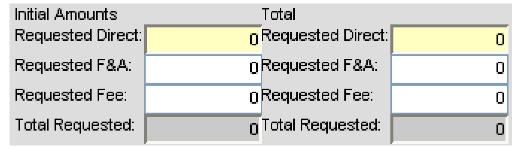
Total Amount:



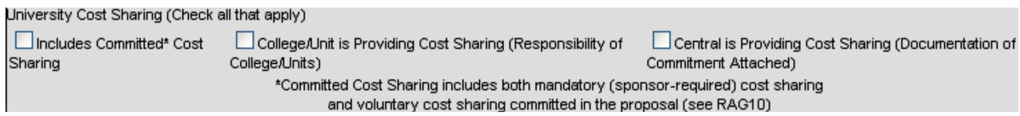
Other:



NA:

<table>
<tr><td></td><td>
</td></tr>
<tr><td>Initial / Total Amounts</td><td>

Input the “Initial Amounts” in the first column (dollar values for the first period only). Dollar values for the entire project go under the “Total” in the second value. Only Requested Direct is required to be input, but if F&A and/or Fees are applicable they must also be inputted. The program just does not prevent saving the record if they are not inputted.

*NOTE: The total values will be auto-populated with the same values from the “Initial Amounts” column. If you are inputting a multi-period proposal remember to change the values in the “Total” column to the appropriate values.</td></tr>
<tr><td>University Cost Sharing:</td><td>The University Cost Sharing mirrors the same fields on the paper PIAF form. Check any/all that apply.

</td></tr>
<tr><td>Remarks or Special Instructions:</td><td>This section is reserved for any additional information that you feel needs to be provided just as you can on the paper PIAF Form. You have up to 2000 characters of free from text that you may enter. This field is only mandatory if “N/A” is selected as the F&A Basis.</td></tr>
<tr><td>End of Data Entry for PIAF Page 1:</td><td>If you have gone through the previous steps, then you are done with the data entry portion of the PIAF Page 1 Form. The PIAF Page 1 can now be saved and an OSP number will be assigned.</td></tr>
</table>

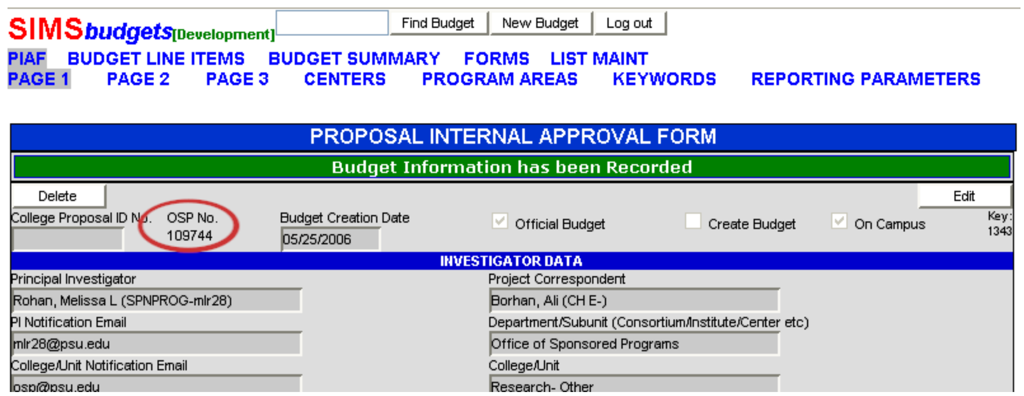
PIAF Page 1 – Saving the Proposal

Save:

You may want to review the information entered one more time before you save (especially if you are new to SIMS*budgets* since some fields cannot be edited later in this version – see cheat sheets for details). Click one of the “Save” buttons located at the top and bottom right hand portions of the screen.

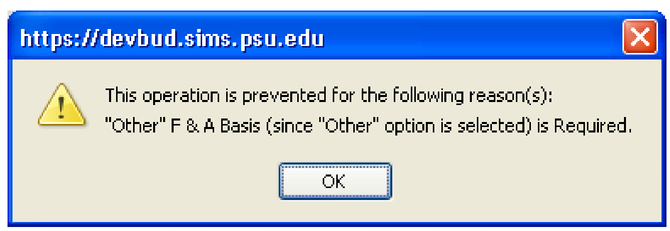
Successful Save:

If you have all the mandatory fields completed that are necessary based on your selections then the record will be successfully saved. You can tell that a record has been saved by seeing a read-only copy of your PIAF Page 1 with a green message across the top that says “Budget Information has been Recorded”. **<u>Also note that a unique OSP No. has been generated and is now displayed under the label “OSP No.”</u>** (See the OSP No. field below that has been circled in red).



Unsuccessful Save:

SIMS*budgets* will warn you if you missed entering mandatory information. For example, you could get a message that looks something like this:



In the above example, “Other” was selected as the F&A Basis, but no description was entered in the mandatory “Other” field. Depending on what is missing, the message will be tailored to let you know exactly what needs to be done in order to successfully save your record.

Sometime you may have another type of error however. For instance, the College Proposal ID No (if used) must be unique. If you attempt to save a proposal that has all the necessary information filled in, but uses a College ID No. that was previously used, you will get an error message like this:

PIAF Page 2 – Special Review Checklist / Disclosures & Assurances

Navigate to Page 2:

Once you have saved a new proposal or located an existing one, you can access the PIAF Page 2 by clicking on the blue “Page 2” hyperlink on the menu (under the PIAF header).

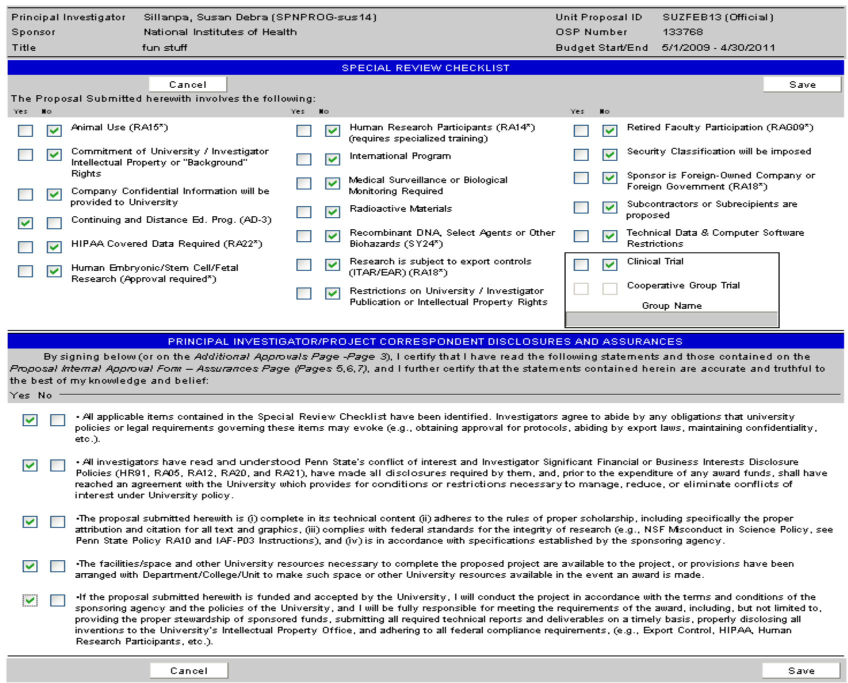
Edit:

Edit

Click “Edit” to fill out the PIAF Page 2 Form.

Answer Questions:

Answer the questions on Page 2 as directed by the Principal Investigator:



☛ ***Note that the paper PIAF must still be printed out and SIGNED by the PI!***

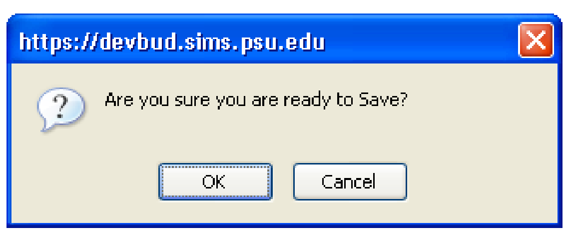
Save:

Save

Click “Save” to record the answers to all checklist questions into the database.

Successful Save:

When you click “Save”, the program will ask you if you are sure as shown:

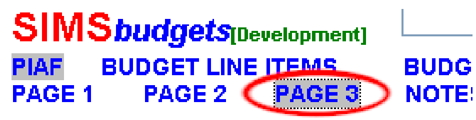


Click OK and you will see your changes in read-only mode. At this time you can click edit again to make more selections or changes or you can continue on to another page.

PIAF Page 3 / Assignment of Credit

Navigate to Page 3:

Once you have saved a new proposal or located an existing one, you can access the PIAF Page 3 by clicking on the blue "Page 3" hyperlink on the menu (under the PIAF header).

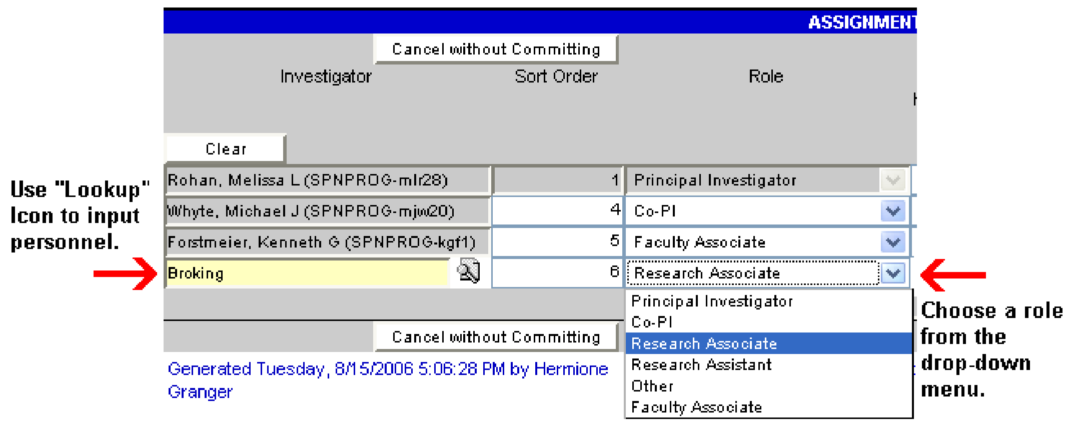


Edit:

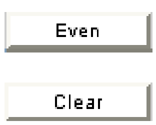
Click "Edit" to begin completing the PIAF Page 3 Form.

Adding Participants:

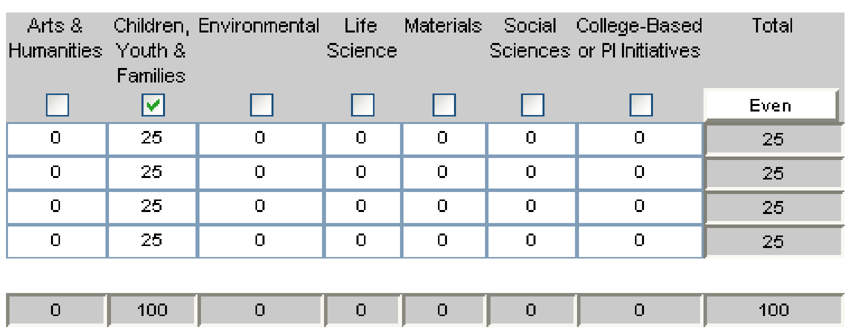
Focus on the left side of the screen under the columns "Investigator" and "Role". Do not worry about the "Sort Order" column until all the names are added. The Principal Investigator's name and role will already be inputted. Continue to add all personnel who should be included on the assignment of credit form and their roles.



Assign Credit:



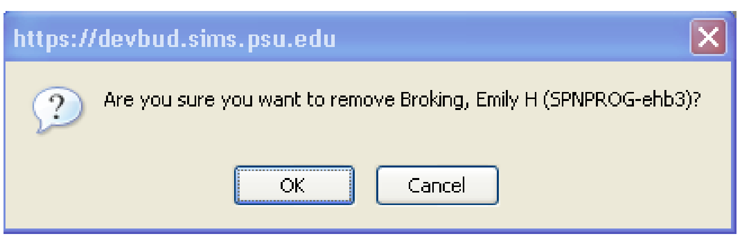
Once personnel are entered onto the form, fill in the percentages for assignment of credit under the appropriate categories. You can hand type in numbers manually for each line or you can use the "Even" Button. To use this feature:



Arts & Humanities	Children, Youth & Families	Environmental	Life Science	Materials	Social Sciences	College-Based or PI Initiatives	Total
	☑						Even
0	25	0	0	0	0	0	25
0	25	0	0	0	0	0	25
0	25	0	0	0	0	0	25
0	25	0	0	0	0	0	25
0	100	0	0	0	0	0	100

- Put a check box in the category (or categories) that apply.
- Click the "Even" button to distribute credit evenly amongst personnel listed.
- Click the "Clear" button to set all values back to zero.

NOTE: The assignment of credit numbers must either add up to 100% or the table must be completely cleared to save the page.

PIAF Page 3 / Assignment of Credit (continued)	
Sort Order	If you need the personnel to be in an order other than how they were entered. Use the “Sort Order” column. The PI will always have the value “1”. The Project Correspondent (if used) will always have the value “2”. The next number generated is “4”. To change the order type in the value of the place where you want each participant to be (starting with the number 4). Once the page is saved with the new Sort Order values, the names will be rearranged as specified.
Save: Save	Once you have the table completed and are happy with the results, then click the “Save” button to record your Assignment of Credit entries. It will ask you “Are you sure you are ready to save?” Click “OK” to accept the changes or click “Cancel” to decline. If you click “OK” you will get the following message across the top of the screen: Save of Credit Successful If you click “Cancel” it will take you back into edit mode where you left off. If you decide after manipulating data that you do not want to save any of the changes you made and revert to the original data click “Cancel without Committing”. Cancel without Committing **NOTE: If you are entering large amounts of data, save the page often so you do not lose anything!**
Edit: Edit	Once you have saved the page, you might have revisions later or find that you made a mistake. Click the “Edit” button to modify the PIAF Page 3. Once in edit mode, you can add or delete names, change assignment of credit values, change the sort order, or set the table values back to all zeros.
Delete: ✕	Click the red “X” icon to the left of any name (other than the Principal Investigator or Project Correspondent) while in edit mode to delete them from the table. You will get the following message to confirm that you wish to delete the person:  **NOTE: The only way delete a Principal Investigator or Project Correspondent is to change them to someone else on the PIAF Page 1 Form.**

Submit to OSP – After PIAF Form Entry

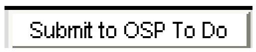
Ready for "Submit to OSP"

Once Pages 1 – 3 of the PIAF form are entered into SIMS*budgets* and it is signed by all appropriate people, the information can be submitted to OSP using the "Submit to OSP" button.

The "Submit to OSP" button takes the PIAF data entered into SIMS*budgets* and records it into SIMS*reports*. This button will only appear on PIAF Page 1 of a record in SIMS*budgets* in "Read-Only" mode when all necessary fields for submission to OSP are complete.

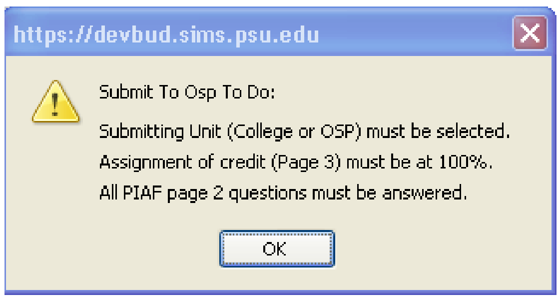
Submit to OSP To Do:

If all information needed for "Submit to OSP" is NOT completed, you will not see the "Submit to OSP" button. Instead, you will only be able to view the "Submit to OSP To Do button":



To Do List:

Click on the "Submit to OSP To Do" button to generate a list of items that still need completed:

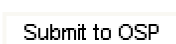


What is required to use "Submit to OSP"?

- Complete all Mandatory Information on PIAF Page 1.
- In the "Submitted by" field on the PIAF Page 1, select either "College/Unit" or "OSP".
- All PIAF Page 2 questions must be answered.
- The Page 3 (Assignment of Credit) form must be completed and add up to 100%.
- The PIAF form must be signed by all appropriate personnel.

Click on "Submit to OSP":

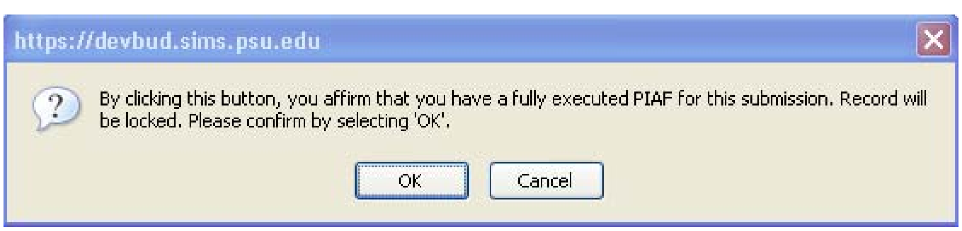
When all "Submit to OSP" requirements are met, the button will change to "Submit to OSP".



***NOTE: The "Submit to OSP" button will only appear in "Read-Only Mode" on Page 1.**

Fully executed PIAF affirmation:

When you click on the "Submit to OSP" you will get the following message:



***NOTE: Do not click OK if you do not have a complete and fully executed PIAF for this submission!**

SIMS*reports* - Proposal Manager / Integration Reporting

Overview:

Now that SIMS*budgets* and SIMS*reports* share data, there is a need to be able to manage proposals that have been created SIMS*budgets* and the corresponding information that is then transferred into to SIMS*reports*.

This is handled through “Integration Reporting”. This section will cover the various reports that you will use to navigate proposal data in both applications. This documentation will focus on the role of Staff Assistant and follow the process of proposal submitted in the following ways:

- College/Unit submits proposal via paper copies to OSP.
- College/Unit enters their own PIAF data directly into SIMS*budgets*.

Once proposals are entered into SIMS*budgets*, the proposals must become “Pending” through data entry in Proposal Manager in SIMS*reports*.

Login Procedure for Proposals - College/Unit Submitting ONLY Paper Copies of PIAF

College / Unit Submits on Paper:

If the college/unit does not submit a proposal electronically via SIMS*budgets*, then OSP Staff Assistants enters the data from the fully executed PIAF form into SIMS*budgets* when it physically comes into the office. See “Entering a Proposal” for instructions on how to enter the data.

Enter the Proposal / Submit to OSP:

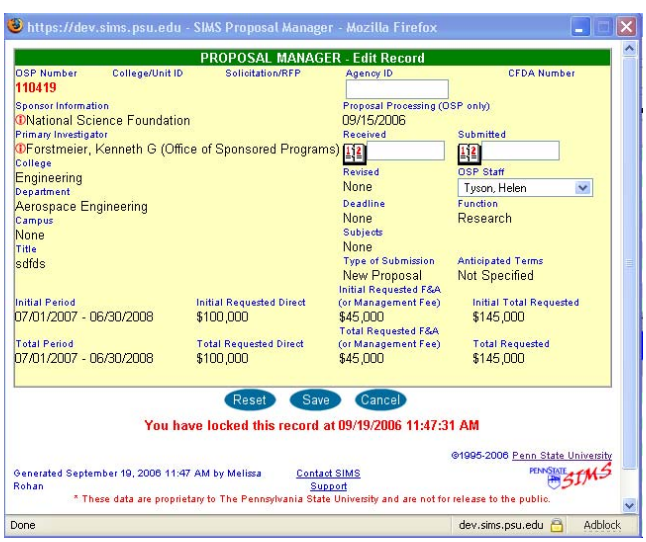
Once a proposal is entered into SIMS*budgets* and you have verified that the copy received by OSP is a fully executed PIAF document, click on “Submit to OSP”. At this point the proposal is considered a “Proposal in Transit” and will appear on your “Proposal in Transit” (PIT) report.

What is a Proposal in Transit?

A proposal in transit is a proposal that has been submitted to OSP by either the College / Unit or OSP Staff that does not have all the information needed in SIMS*reports* Proposal Manager to become a “Pending Proposal”.

Accessing a Proposal in Transit in Proposal Manager

When an OSP Staff Assistant clicks on “Submit to OSP” after entering the information from the paper PIAF form into SIMS*budgets*, a pop-up proposal manager window will appear with the corresponding PIAF information in edit mode as follows:



***Note: Some users may experience problems with pop-up windows. If this window does not appear see “Alternate Instructions”.**

College/Unit Submitting ONLY Paper Copies of PIAF (Continued)

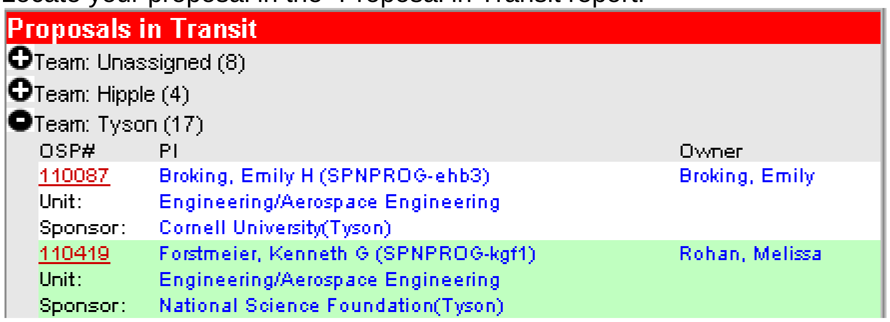
Alternate Instructions: Accessing a Proposal in Transit in Proposal Manager

If you click on “Submit to OSP” and the proposal manager window as described above does not pop up:

1) Return to the SIMSreports Welcome Page
2) Refresh the screen by clicking on the refresh icon or hitting “F5” on your keyboard:

   (Refresh Icon in Firefox)

3) Locate your proposal in the “Proposal in Transit report:



Proposals in Transit

Team: Unassigned (8)

Team: Hipple (4)

Team: Tyson (17)

OSP#	PI	Owner
110087	Broking, Emily H (SPNPROG-ehb3)	Broking, Emily
Unit:	Engineering/Aerospace Engineering	
Sponsor:	Cornell University(Tyson)	
110419	Forstmeier, Kenneth G (SPNPROG-kgf1)	Rohan, Melissa
Unit:	Engineering/Aerospace Engineering	
Sponsor:	National Science Foundation(Tyson)	

4) Click on the OSP number to open this record in proposal manager.
5) Click “Edit” to access the record in “Edit Mode”

Send proposal to “Pending” status:

Now that you have your proposal record open in Proposal Manager, the following information must be complete for the proposal to become “Pending”.

- Select the appropriate OSP Staff.
- Enter the Received Date. This is the date that the proposal was received in the OSP office.
- Enter the Submitted Date. This is the data that the proposal was actually submitted to the sponsor by either the actual College / Unit or by OSP.
- Save the record in proposal manager. The status message at the bottom of the proposal manager record will indicate that the proposal is now “Pending”
- If you do not have the information yet to complete all necessary fields, the proposal will remain “In Transit” until the information is completed.

Login Procedure for Proposals - College / Unit <u>Submitting Electronically</u> through SIMS*budgets*

College / Unit Enters Proposal / Submits to OSP:

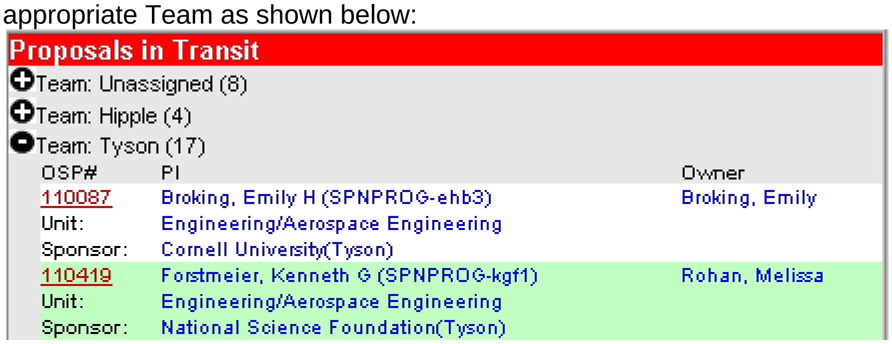
Once a proposal is entered into SIMS*budgets* by the College/Unit they will click on "Submit to OSP". At this point the proposal will go to a "Team Leader" report for assignment. Staff assistants will not see the proposal until it has been assigned. Once the team leader assigns the proposal, it is considered a "Proposal in Transit" and will appear on your "Proposal in Transit" (PiT) report.

What is a Proposal in Transit?

A proposal in transit is a proposal that has been submitted to OSP by either the College / Unit or OSP Staff that does not have all the information needed in SIMS*reports* Proposal Manager to become a "Pending Proposal".

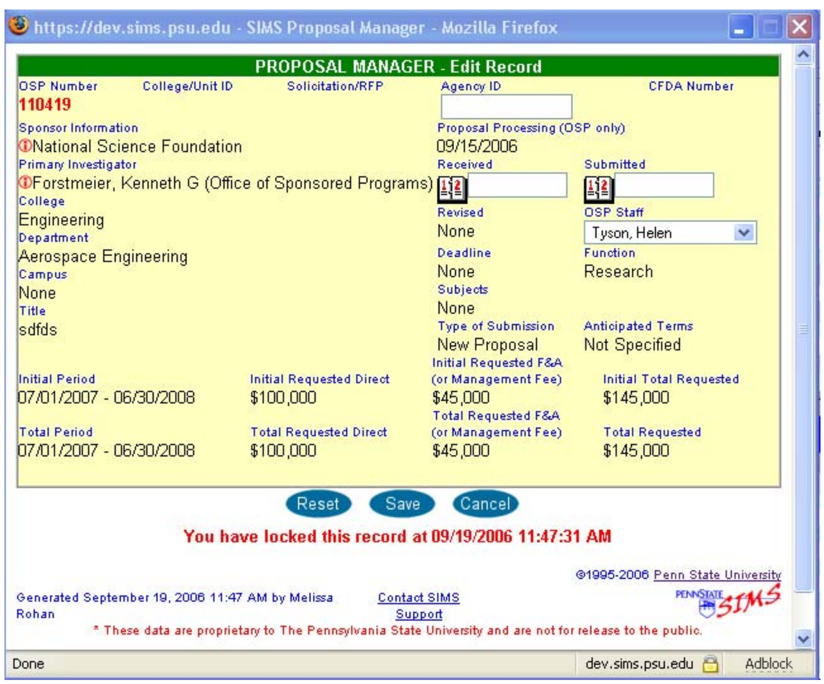
Proposal in Transit (PiT) Report

When the paper copy of a fully executed PIAF that was entered electronically via SIMS*budgets* is received by OSP, locate the proposal in the PiT report under the appropriate Team as shown below:



Click on proposal in PiT report to access the record in Proposal Manager

The record will open in Proposal Manager as shown below:



Send proposal to "Pending" status:

- Select the appropriate OSP Staff.
- Enter the Received Date. This is the date that the proposal was received in the OSP office.
- Enter the Submitted Date. This is the data that the proposal was actually submitted to the sponsor by either the actual College / Unit or by OSP.
- Save the record in proposal manager. The status message at the bottom of the proposal manager record will indicate that the proposal is now "Pending".

SIMS*reports* – Negotiation Manager

Locating Existing Records and Entering New Awards

Overview:

The following section will cover the procedures for logging in an award into SIMSreports and other actions that are completed using Negotiation Manager. This section will cover:

- Receipt of new Award or Award Action
- Locating existing records (various methods)
- Creating Negotiation Manager records for new awards.
- Using “Copy” to create new awards from similar existing records.

Receipt of Award / Log-In Procedure for New Awards / Locating Records

Award is Received:

Negotiation Manager is used once a sponsor makes an award. An award document may arrive at Sponsor Programs in one of the following ways:

- By mail
- Electronically from the sponsor

Log-In Procedure for Awards:

Once the award is received, it is directed to the Contractual Mail Coordinator. This person checks to see if the award is associated with a proposal and checks that a duplicate award was not previously received.

Types of Awards that are logged in:

- New Awards
- Additional funds to existing awards
- Administrative changes
- Ben Franklin
- Billing purposes only
- Budget revisions
- Change of PI
- Decrease in funds
- Final reports
- Fixed cost agreement
- Master Agreement ($0)
- No-Cost Extensions
- Non-Financials
- Penn State Subs
- PIDA
- RFPs
- Subcontracts
- Other (Financial & Non-Financial)

Locating Records

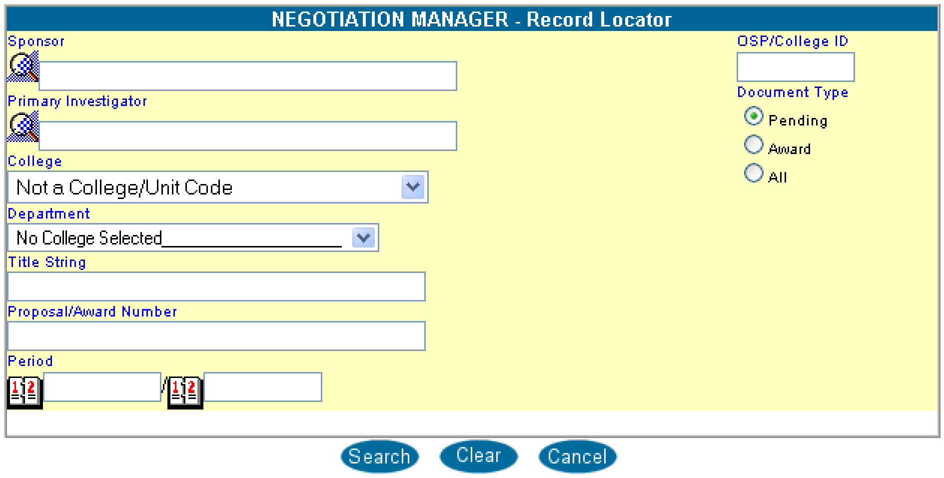
Access Negotiation Manager:

First open negotiation manager from either the SIMSreports Welcome page or from a link from within one of the managers.

Checking for prior entries:

Click on the “New” button from the negotiation manager window. A new pop-up window will appear. Click on the “Locate” button. This will bring up the “NEGOTIATION MANAGER – Record Locator” screen.

Record Locator Screen:



Using the Record Locator Screen:

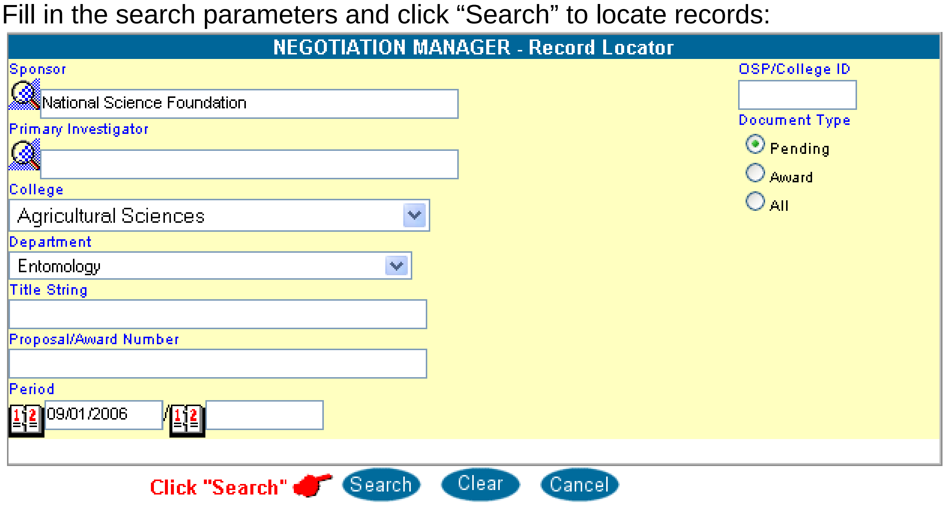
The record locator screen has fields (or search parameters) that you can use to narrow your search for prior record entries:

- Sponsor Name
- Primary Investigator
- Collge / Unit
- Department
- Title String
- Proposal/Award Number
- Period Dates
- OSP/College ID
- Document Type (Pending/Award/All)

Fill in Search Parameters and click "Search"

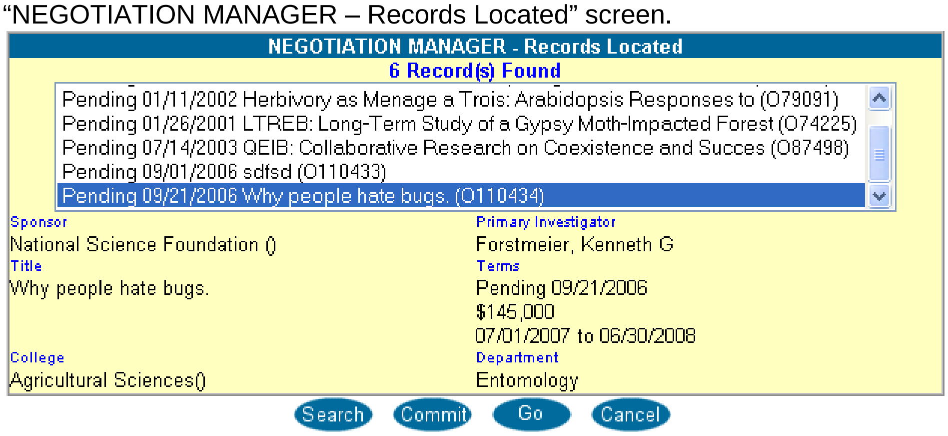
Search

Fill in the search parameters and click "Search" to locate records:



Records Located:

If If there are records that meet your search criteria, the list will appear on the "NEGOTIATION MANAGER – Records Located" screen.



Entering Award for Existing Proposal – No Prior Award

Select record and click "Commit" if no prior award: Commit

If no prior award has been made on the record selected (any status other than "received"), the click the "Commit" to create a new negotiation manager record.

Creating "New" Negotiation Manager Record:

When creating a new negotiation manager record (when creating from a previously entered proposal), the following fields should already be populated. Check for accuracy:

- OSP Number
- Proposal Submitted Date
- Notice Received (today's date)
- Sponsor
- Prime Sponsor
- Primary Investigator
- College and Department
- Award Type (defaults to "Contract")
- Title
- Team Affiliation
- Action (defaults to "New")
- Amount (Initial period amount)
- Start / End Dates
- Function
- Team Affiliation

Fill in the "Award Number", "Other Award Number Info" if needed and "Staff Assigned". Click "Save" to complete the entry. A status message will appear on the bottom of the screen stating "Record Inserted".

NOTE: When PSU receives funds from an organization, that organization is identified as PSU's Sponsor. If our Sponsor receives its funds from yet another organization, its original funding source is known as the Prime Sponsor.

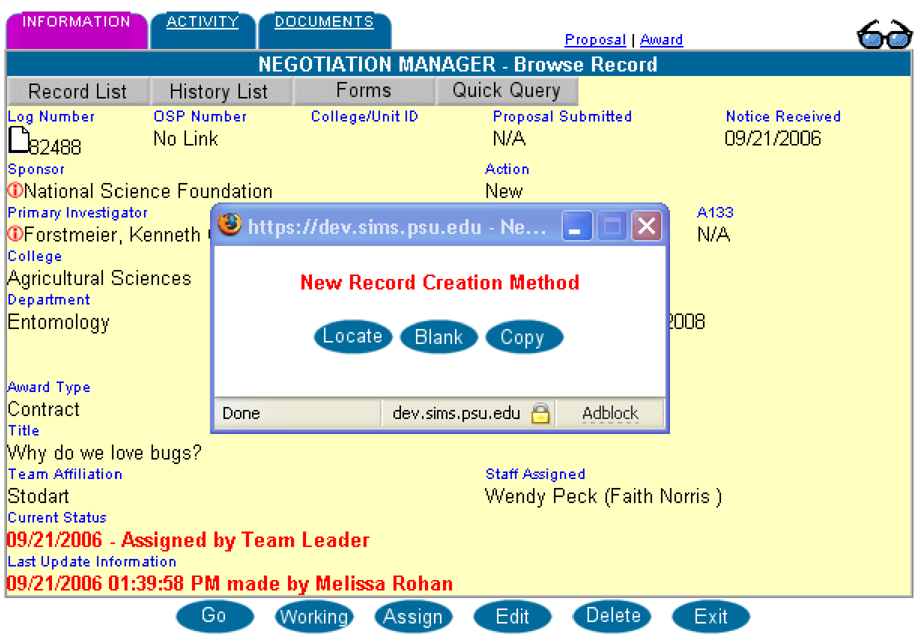
- Example 1: If USDA issues an award to Cornell, and Cornell issues a subaward to PSU, then Cornell is the Sponsor and USDA is the Prime Sponsor.
- Example 2: If USDA issues an award to Amgen, Amgen issues an award to Cornell, and Cornell issues an award to PSU, then Cornell is the Sponsor and USDA is the Prime Sponsor.

Entering New Award using "Copy" – No existing award / Use "similar" record

Using an Existing Record to Create a New One:

While trying to locate a previous record when entering award information, you may find a record that has been entered previously and most of the data is similar to the data to be entered. If this is the case, you can use "Copy" to create another record just like it and modify it with any information that is different.

Select the record using Records Locator, select "Go" to bring up the similar Negotiation Manager Record. Click "New" from this screen to bring up the "New Record Creation Method" and select "Copy":



You can then modify the record to reflect the information in the new Negotiation Manager record that is created.

Entering New Award – No existing proposal or previous award

No former records available?

It is possible that an award will arrive at OSP that has no prior proposal or award documented or associated with it. After you have confirmed that no prior records by using the steps above, it is necessary to insert a new record. This is done from the Negotiation Manager page, by clicking “New” and then “Blank”.

A new blank negotiation manager record will appear. You must enter the following fields to save the record:

Completing New Record:

New

Blank

The following information must be filled in:

- Sponsor
- Faculty
- College
- Department
- Action
- Function
- Award Type
- Title
- Team Leader

If other information is available that is not listed above as mandatory, it should be included. Enter data, click “Save” and the record will get an assigned a log number.

NOTE: When PSU receives funds from an organization, that organization is identified as PSU's Sponsor. If our Sponsor receives its funds from yet another organization, its original funding source is known as the Prime Sponsor.

- Example 1: If USDA issues an award to Cornell, and Cornell issues a subaward to PSU, then Cornell is the Sponsor and USDA is the Prime Sponsor.
- Example 2: If USDA issues an award to Amgen, Amgen issues an award to Cornell, and Cornell issues an award to PSU, then Cornell is the Sponsor and USDA is the Prime Sponsor.

Alternative ways of Locating Negotiation Manager Records

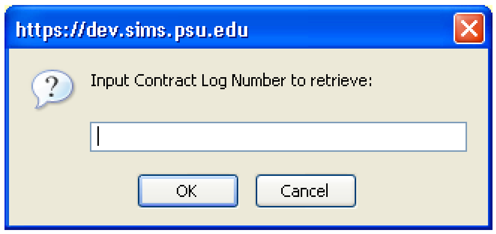
Other ways to find records:

Ways of finding available records include:

- Go Button (covered partially in previous section)
- Record List
- Quick Query

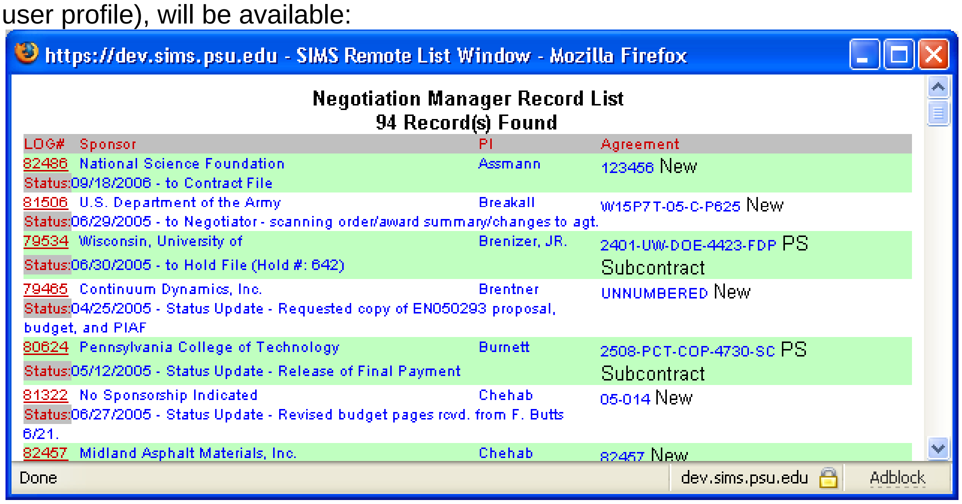
Finding Records – "Go" Button

Use the "Go" Button to locate records by Log Number. At the negotiation manager click the "Go" button. A screen will appear where you can enter the "Contract Log number":



Finding Records – Record List

When you first access Negotiation Manager from the Application Menu, a record is not initially associated with the screen. Click "Record List" to find records that are currently in progress. Only records that the user has access to (depending on their user profile), will be available:



Click on the "LOG#" that you want to go to that record. You can also sort the Record List by LOG#, Sponsor, Faculty Name or Agreement by clicking on that column header.

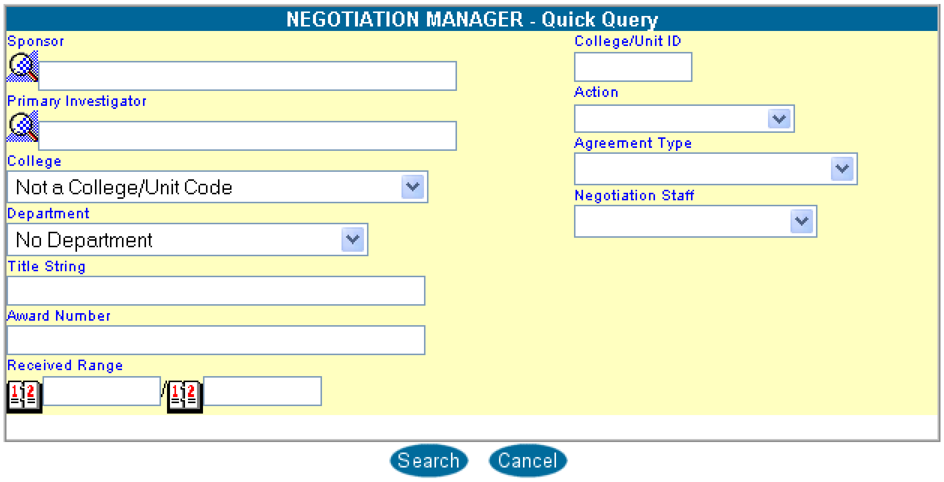
Finding Records – Quick Query

Click on:

Finding a record using Quick Query is very similar to using Record Locator except that the fields are more specific to records that are already in negotiation manager.

Quick Query

Enter search criteria in fields.



Entering New Information for Existing Award – Award Previously Received

Select record and click "Go" if award already received: Go	The next scenario for located records, is if the located record has the status "Received". In this case, you can select the record and click "Go" to go to the record. You can then make changes or add activities to the record. This will be covered in the next section.

Negotiation Manager – Assignment of New Awards

New Awards must be assigned by Team Leader:

Once a new award is entered, the team leader will assign the document. This assignment must be made before any activities can be entered for the record. There are two ways to assign a record:

- Link from Team Document Assignments Report
- Activity Tab

Team Leader Assignments

When a new award is entered into SIMS*reports*, a team leader is automatically notificed of receipt via a report on the top left side of their SIMS*reports* Welcome Screen:

Team Document Assignments (Leader)

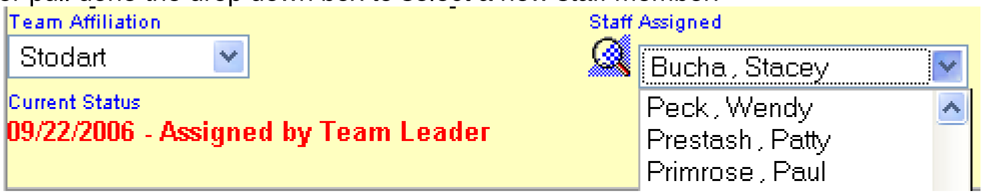
82461	07/08/2005	U.S. Department of Health and Human Services	Greenberg
82459	07/08/2005	U.S. Department of Health and Human Services	King
82458	07/08/2005	U.S. Department of Health and Human Services	King
82450	07/07/2005	COP: Historical and Museum Commission	Carroll
82444	07/07/2005	COP: Department of Environmental Protection	Urquidi-Macdonald
82442	07/07/2005	COP: State System of Higher Education	Zinn
82433	07/07/2005	National Science Foundation	Zha
82431	07/07/2005	By The Numbers	Van Horn
82424	07/06/2005	Association for Institutional Research	Volkwein
82411	07/06/2005	Tuscarora Intermediate Unit	Van Horn
82408	07/06/2005	KCF Technologies, Inc.^	Rahn
82385	07/05/2005	U.S. Department of Health and Human Services	Cavigelli
82367	07/05/2005	U.S. Department of Health and Human Services	Preston
82362	07/05/2005	U.S. Department of Health and Human Services	Vogler
82361	07/05/2005	U.S. Department of Health and Human Services	Vogler

Assignment – Link from Team Leader Assignment Report

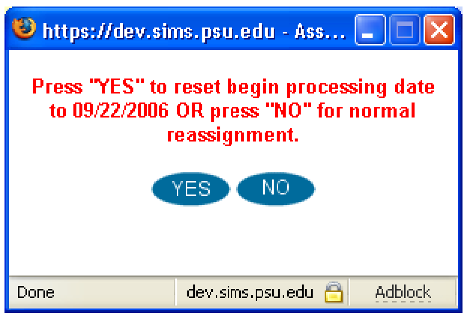
The team leader can click on any record in the "Team Document Assignments (Leader)" report to access that particular record in Negotiation Manager. After confirming that they have selected the correct record, the team leader clicks the "Assign" button at the bottom of the page. This will take you to the "Assign Record" screen of Negotiation Manager.

The addition of a stimulus reporting flag labeled "ARRA" for American Recovery and Reinvestment Act (ARRA) was added for reporting on negotiation and award managers. That flag will be used for all stimulus fund reporting. Indicators have been added to the log and statement of award.

<table>
<tr>
<td>Check Team Affiliation and make Staff Assignment:</td>
<td>The Assign Record page has the “Team Affiliation” and “Staff Assinged” fields automatically populated from information from data in Proposal Manager. Check that the record has the correct Team Affiliation. The Staff Assigned can remain the same or pull done the drop down box to select a new staff member:

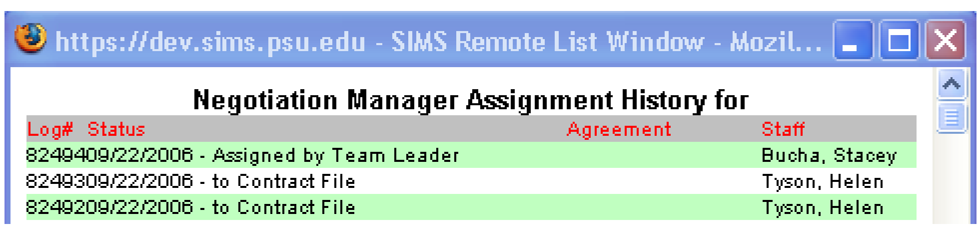


</td>
</tr>
<tr>
<td>Reset Processing Date or Reassignment:</td>
<td>After making the appropriate selections, click “Assign”. A pop-up window will appear asking your to “Press “YES” to reset begin processing date to “today’s date” OR press “NO” for normal reassignment. The team leader will pick the appropriate choice.



</td>
</tr>
<tr>
<td>Check on former Agreement Assignment:


</td>
<td>For records that are amendments or continuations of a previous award, check to see which staff was assigned to the former agreement. Click on the “look-up” (magnifying glass) icon to the left of the “Staff Assigned” field. This will bring up a list of the history of this award and the negotiator assigned to that record.

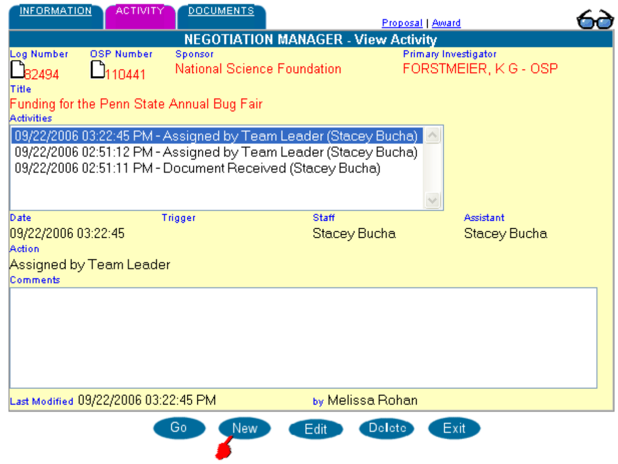


</td>
</tr>
<tr>
<td>Record appears in “Staff Document Assignment”:</td>
<td>After the team leader assigns the record, it will appear under the “Staff Document Assignments” report on the Welcome Screen of the person it was assigned to:

</td>
</tr>
</table>

Assignment – From the Activity Page

The next method of assignment is also accessed from the negotiator record after opening it. From the negotiation manager record, click on the "Activity Tab" and then the "New" button at the bottom of the "View Activity" tab.



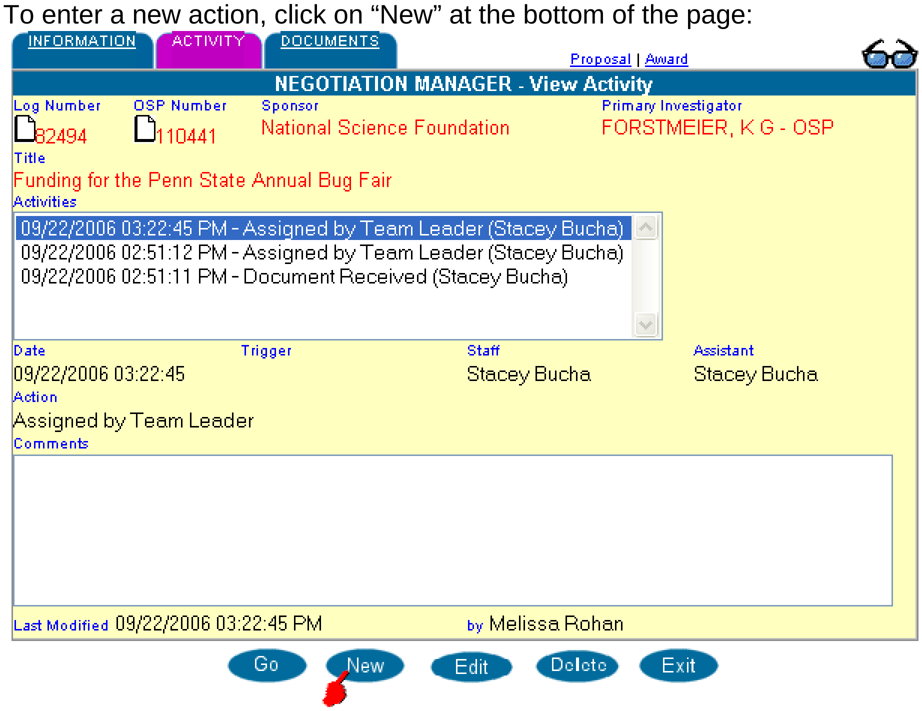
Activities Page – Adding Activities

Actions

The Activity Tab on a Negotiation Manager Record is used to record any actions taken with a particular record. The following shows actions that may be taken with a brief description:

- ***Document Dead*** – No further action to be taken on this record. (Closing Action)
- ***Fully Executed Received*** – Document received from Sponsor and is awaiting OSP action. (Status doesn't Change)
- ***In Typing*** – Self-explanatory. (In-Type)
- ***Mailed to Sponsor*** – Waiting for response from Sponsor. (Hold)
- ***Emailed to Sponsor*** – Waiting for response from Sponsor. (In-Process Action)
- ***Out for Signing*** – Awaiting PSU Signature. (Hold)
- ***To College/Unit*** – Award Note is sent to college for approval. (In-Process Action)
- ***To Research Accounting*** – Award Clearance is sent to Research Accounting for approval. (In-Process Action)
- ***Sponsor Draft Received*** – Negotiations on Sponsor-initiated agreement. This action will put the record into DRAFT status. (In-Process Action)
- ***Status Update*** – Miscellaneous actions to record. (Status doesn't Change)
- ***To Contract File**** - Contract negotiations completed. (Closing)
- ***To Hold File**** - Places document in hold until next trigger. (In-Process Action)
- ***To Negotiator*** – Negotiator action required. (In-Process action)
- ***To Pre-Review*** – Sent to college, risk management, or research accounting for pre-review. (Pre-Review Action)
- **To Staff Assistant –** To a staff assistant. (In-Process action)
- ***Two Signed Copies Received*** – Agreement received and awaiting PSU signature. (Status doesn't Change)
- ***Contract Detail*** – Allows negotiators to input data that will later be used to create the award statement. (Status doesn't Change)

	▪ ***To Risk Management*** – Award is sent to Risk Management for review. (In-Process Action) ***NOTE***: Choosing any of the above activities EXCEPT Fully Executed Received, Sponsor Follow-Up, Status Update, or Two Signed Copies Received will remove the record from the negotiators “assigned” list on the log-in screen.
Click on “Activity” Tab:	From the record you are workin on in Negotiation Manager, click on the “Activity” tab. The tab turns to purple and the activity screen is displayed. You can either view a previous action that is displayed or enter a new action.

Viewing Activities:	Clicking on one of the Activities in the “Activities” box will display pertinant details about the action below it such as Date, Staff, Assistant, Action, and comments.
Adding a New Activity:	To enter a new action, click on “New” at the bottom of the page: 

Contract Detail Activity and Contract File/Statement of Award	The following changes will be made to Negotiation Manager “Contract Detail” activity and Award Manager based on a request from OSP: July 2009. Waiver options will only be available for financial documents that receive a new OSP number. Negotiation Manger “Contract Detail” activity and Award Manager will be validated for proper waiver input before save.  **Amount of F&A Collected options** – default to blank selection and force data entry - Full with Industry Premium (explanation options not available) - Full (explanation options not available) - Partial - None **Waiver Explanation options (Explanation of why PSU is not collecting Full F&A)** - Ben Franklin Technology Partners - Clinical Trials (26% TDC) - Domestic non-profit with published guidelines - Gifts and charitable contributions - IPA agreement - Mixed state/federal funding (F&A on federal funds only) - PennDOT cap (25% MTDC) - State funding (no federal funds) - State funds flowed through local gov. or school board - Federally imposed restriction (e.g., DoD, USDA, USDE) - Waiver approved - Unrestricted Grant (15% total costs)
Later