December 18, 2019 Research Administration Forum



Agenda

- UAccess Research (UAR) Tips & Tricks
 - Medusa, various IDs, searches, Q&A



- 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

C	Development Proposal Lookup 🖻 Main														
														* requ	ired field
					Propos	sal Numb	er:								
					Pro	posal Typ	oe: selec	t					V 🔍 💭		
					Pro	posal Sta	te: selec	t			🧹 🔍 🛄				
						Project Tit	le:								
	Proposal Person Full Name:					ne:									
	Sponsor Deadline Date From:					m:									
	Sponsor Deadline Date To:					Го:									
	Sponsor Code:					de:	(s) 📖							
	Sponsor Name:					ne:							۵ 📖		
	Lead Unit:						nit:	۵ 📖				Ô۳	onct	to	
					Lead	Unit Nam	ne:					υþ		۵ 📖	
						Award	ID:					Pr	onos	al	
					Grants.gov	Opportun	ity:						5403		
					Hiera	archy Stati	JS:		\sim		Sur	nm	arv t	ab i	n
					Proposal Docum	ent Numb	er: 13276	55							
					(search	clear	cancel				Pro	opos	al	
C	One item retrieved.						^hide				De	eve	lopm	nent	
	Actions	Proposal Number	<u>Proposal</u> <u>Type</u>	Proposal State	<u>Project Title</u>	Sponsor Code	<u>Sponsor</u> Name	Principal Investigator	<u>Lead</u> <u>Unit</u>	<u>Lead Unit</u> <u>Name</u>	<u>Sponsor</u> Deadline Date	Award ID	<u>Grants.gov</u> <u>Opportunit</u> y	<u>Hierarch</u> <u>Status</u>	Proposal Documen Number
<u>•</u>	edit <u>view</u> copy medusa	0751	<u>New</u>	<u>Approved</u> <u>and</u> Submitted	Intense physiotherapies to improve function in young children	<u>010806</u>	<u>National</u> Institutes of Health	Burris R Duncan	4205	<u>Health</u> Promotion Sciences	06/05/2013			Not in a hierarchy	132765

Export options: CSV | spreadsheet | XML

UAccess Research UAR – Medusa link from search results

RESEARCHER UNIT CENTRAL ADMIN MAINTENANCE SYSTEM ADMIN

E action list Q doc search A analytics

doc search analytics



UAR – Medusa (default view Proposal > Award)

		Doc Nbr:	683114	Status:	FINAL	
gotiationDocument 💿		Negotiator Username:	mattsheeley	Negotiation I	D: 45764	
_		Initiator:	syswerda	Created:	12:28 PM 11/30/2	2018
usa						
					expand all collapse all	
					* required field	d
					required her	u .
edusa	▼ hide					
edusa					?	
				= Collapse	e All 🖲 Expand All	
View: Proposi	al > Award	0,	Award > Pro	osal	refresh	
Institutional Proposal 00022996						
Development Proposal 10751						
Award 007834-00001						
Image: Second state	n Attributes:					
Mard 007834-00001 Second 1401195212 Negotiation 20346 A	n Attributes: * Negotiation ssociation Type:	V			Award: 007834-00	001 🔍
Award 007834-00001 Protocol 1401195212 Negotiation 20346 Negotiation 20774	n Attributes: * Negotiation ssociation Type: Award	V			Award: 007834-00	001 🔍
Award 007834-00001 Protocol 1401195212 Negotiation 20346 Negotiation 20774 Negotiation 20827	n Attributes: * Negotiation ssociation Type: Award	~			Award: 007834-00	001 🕲
Award 007834-00001 Protocol 1401195212 Negotiation 20346 Negotiation 20774 Negotiation 20827 Negotiation 21290	n Attributes: * Negotiation ssociation Type: Award Award	ary of the	e curre	ent 🔺	Award: 007834-00	001 (9)
Award 007834-00001 Protocol 1401195212 Negotiation 20346 Negotiation 20774 Negotiation 20827 Negotiation 21290 Negotiation 27476	n Attributes: Negotiation ssociation Type: Award Award	ary of the	e curre	ent A	Award: 007834-00 ward elect	001 🕲
Award 007834-00001 Protocol 1401195212 Negotiation 20346 Negotiation 20774 Negotiation 20827 Negotiation 21290 Negotiation 27476 Negotiation 31400	Award Award A summ record is	ary of the	e curro d with	ent A	Award: 007834-00 ward elect ward	001 (%)
Award 007834-00001 Protocol 1401195212 Negotiation 20346 Negotiation 20774 Negotiation 20827 Negotiation 21290 Negotiation 27476 Negotiation 31400 Negotiation 34623	Award Award Award Award Award Award Award Award Award Award Award Award Award Award Award Award Award Award	ary of the displayed	e curro d with	ent A	Award: 007834-00 ward elect ward	001 (9)
 Negotiation 20346 Negotiation 20346 Negotiation 20774 Negotiation 20827 Negotiation 21290 Negotiation 27476 Negotiation 31400 Negotiation 34623 Negotiation 37998 	A summ record is navi	ary of the displayed gation but	e curro d with ttons	ent no	Award: 007834-00 ward elect ward nstitutional Propo	oo1 (S
Award 007834-00001 Protocol 1401195212 SNegotiation 20346 Negotiation 20774 Negotiation 20827 Negotiation 21290 Negotiation 27476 Negotiation 31400 Negotiation 34623 Negotiation 37998 Negotiation 40779	A summ A summ record is navi	ary of the displayed gation but	e curro d with ttons		Award: 007834-00 ward elect ward nstitutional Propo	oo1 ®
 Award 007834-00001 Protocol 1401195212 Negotiation 20346 Negotiation 20774 Negotiation 20827 Negotiation 21290 Negotiation 27476 Negotiation 31400 Negotiation 34623 Negotiation 37998 Negotiation 40779 Negotiation 45764 	A summ record is navi	ary of the displayed gation but	e curro d with ttons	ent no	Award: 007834-00 ward elect ward nstitutional Propo one	oon ®
 Negotiation 20346 Negotiation 20346 Negotiation 20774 Negotiation 20827 Negotiation 21290 Negotiation 31400 Negotiation 34623 Negotiation 37998 Negotiation 45764 Negotiation 45764 	A summ A summ record is navi	ary of the displayed gation but	e curro d with ttons	ent no Ir N S	Award: 007834-00 ward elect ward nstitutional Propo one ubaward	oo1 (s
 Award 007834-00001 Protocol 1401195212 Negotiation 20346 Negotiation 20774 Negotiation 20827 Negotiation 21290 Negotiation 27476 Negotiation 31400 Negotiation 34623 Negotiation 37998 Negotiation 40779 Negotiation 45764 Negotiation 45764 Summary 	A summ record is navi	ary of the displayed gation but	e curre d with ttons	ent no Ir N	Award: 007834-00 ward elect ward nstitutional Propo one ubaward	oo1 (Second
 Negotiation 20346 Negotiation 20346 Negotiation 20774 Negotiation 20827 Negotiation 21290 Negotiation 31400 Negotiation 34623 Negotiation 37998 Negotiation 45764 Negotiation 45764 Summary Negotiation ID: 	A summ A summ record is navi	ary of the displayed gation but	e curre d with ttons	ent no Ir N S	Award: 007834-00 ward elect ward nstitutional Propo one ubaward	oo1 (sal
Award 007834-00001 Protocol 1401195212 Negotiation 20346 Negotiation 20774 Negotiation 20827 Negotiation 21290 Negotiation 31400 Negotiation 34623 Negotiation 37998 Negotiation 45764 Negotiation 45764 Negotiation 45764 Negotiation 45764 Negotiation 1D: Negotiatior:	A summ A summ A summ record is navi	ary of the displayed gation but	e curre d with ttons	ent no a no status: Com tart Date: 11/3	Award: 007834-00 ward elect ward nstitutional Propo one ubaward uplete 0/2018	oo1 ®
 Negotiation 20346 Negotiation 20346 Negotiation 20774 Negotiation 20827 Negotiation 21290 Negotiation 31400 Negotiation 34623 Negotiation 37998 Negotiation 45764 Negotiation 45764 Summary Negotiation ID: Negotiation: 	Award Aw	ary of the displayed gation but	e curre d with ttons	ent no no tart Date: 11/3 End Date: 12/0	Award: 007834-00 ward elect ward nstitutional Propo one ubaward uplete 0/2018 3/2018	osal

UAR – Medusa (Award > Proposal `refresh)

	PI:	Burris R Duncan	Document ID:Status:	727314:FINAL
KC Award 💿	Lead Unit:	Health Promotion Sciences	Award ID: Account:	007834-00001:3009370
	Sponsor Name:	Eunice Kennedy Shriver Nationa	Last Update:	08/05/19 by riddlea
Medusa 4				
Madaba -				
			time & money	expand all collapse all
Medusa 💌 h	ide			
Meduca				2
neuusa			= Collapse	All 🖲 Expand All
View: O Proposal > Awa	rd	• Award	> Proposal	refresh
Award 007834-00001				
🖓 Institutional Proposal 00022996				
Development Proposal 10751				
Protocol 1401195212				
SNegotiation 20346				
SNegotiation 20774				
SNegotiation 20827				
SNegotiation 21290				
SNegotiation 27476				
SNegotiation 31400				
SNegotiation 34623				
SNegotiation 37998				
SNegotiation 40779				
Negotiation 45764				
Eubaward 41				
Call Subaward 387				

UAR – Medusa, jump to PD

Medusa	3						
					 Collapse All * Expand All 		
Vie	w: O Prop	osal > Award		(Award > Proposal refresh		
Awa Awa	Award 007834-00001 Opens A			acts and A	ttachments in		
-1	Development Proposal 10751	another browser tab, Notes panel					
1	Development Proposal 10751						
			open propos	sal notes			
	Proposal No:	10751		Status:	Approved and Submitted		
	Lead Unit:	4205:Health Promotion	n Sciences				
	Start Date:	04/01/2014		End Date:	03/31/2019		
	Title:	Intense physiotherapie	pies to improve function in young children with cerebral palsy				
	Proposal Type:	New					
	NSF Code:	F.04: Other - Life Scien	er - Life Sciences				
	Sponsor:	010806 National Institu	utes of Heal	th			
	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) Theodore P Trouard			4205 : Health	Promotion Sciences (Lead Unit)		
				0701 : 2328 :	: Medicine Administration : Biomedical Engineering		
	Chengcheng	Hu					

Protocol 1401195212



UAR – Medusa, jump to IP Notes

usa				- Collanse All - Expand	
				- Conapse Air • Expand	
View:		O Proposal > Award	• Award > Proposa	al ref	
ward 007834-00	0001	Opens Inst Pro	Notes and Attachm	ents	
Institutional Pr	oposal 00	022996		. \	
Institutional Pro	posal 000	panel (signed	submission documer	nts)	
		open proposal	notes		
Proposal	No.	Title		Status	
0002299	96	Intense physiotherapies to improve functio	n in young children with cerebral palsy	Funded	
Propo	sal Type:	New	Sponsor Prpsl No	: PAR-11-260	
	Account:		Activity Type	: Research	
N	SF Code:	F.04: Other - Life Sciences	Notice of Opp	:	
	Sponsor:	010806 National Institutes of Health			
Prime	Sponsor:				
		Initial Period	Total Period		
Requested St	art Date:	04/01/2	014 04/01/201	4	
Requested E	ind Date:	03/31/2	015 03/31/201	9 Cost Sharing	
Total Dir	ect Cost:	\$393,822	.00 \$2,315,777.0	0 Special Review	
Total F	&A Cost:	\$100,277	.00 \$379,591.0	0	
Total	All Cost:	\$494,099	.00 \$2,695,368.0	0	
Investigators		Units			
	Burris R	Duncan (Principal Investigator)	4205 : Health Promotion S	ciences (Lead Unit)	
		Theodore P Trouard	0701 : Medicine Ad 2328 : Biomedical B	ninistration Ingineering	
		Chengcheng Hu			

Development Proposal 10751

UAR – Medusa, jump to Award Attachments

	0		<u> </u>					
View:	• • PI	oposal > Award	O Award > Proposal					
nstitutional Proposal 00	022996	Opens Awa	ard Comments. Notes & Atta	achments				
Development Proposa Maward 007834-00001	al 10751	panel (panel (fully executed award documents)					
Award 007834-00001								
		open awa	notes hierarchy actions					
Summary			· 🔶					
A	ward ID:	007834-00001	Award Type:	Grant				
Sponsor A	ward ID:	5R01HD079498-05	Activity Type:	Research				
Acc	ount ID:	3009370	Account Type:	None Selected				
Award	d Status:	Active						
	Title:	Intense Physiotherapies to 1	mprove Function in Young Children with Cerebral Pals	У				
Dates & Amounts								
:	Sponsor:	010791 Eunice Kennedy Shi	iver National Institute of Child Health and Human Dev	elopment				
Project Sta	art Date:	05/05/2014	Obligation Start Date:	11/01/2018				
Project E	nd Date:	10/31/2020	Obligation End Date:	10/31/2020				
Anticipated Cur	nulative:	\$2,219,573.00	Obligated Cumulative:	\$2,219,573.00				
Award Details Recorde	ed 🛛							
Approved Su	ibaward?	No	Payment Schedule?	No				
Approved Equ	uipment?	No	Sponsor Funding Transferred?	No				
Approved Foreign	n Travel?	No	Cost Share?	No				
	F&A?	Yes						
Investigators								
	Investi	gators	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**

	Doc Nbr:	132765		Status:	Approved and Submitted					
Proposal Development	nt Document 💿	Initiator:	<u>jassini</u>		Created:	09:30 AM 05/17/2013				
		Sponsor/S2S:	S: National Institutes of Health/None		PI:	Burris R Duncan				
Proposal	Proposal 4									
Document was successfully reloaded. expand all collapse all ?										
Required Fields for Saving Document hide										
Required Fields for Saving Docume	ent					2				
Proposal Number:	10751	Sponsor Code: 010806 () Institute		010806 🔍 🛄 National Institutes	s of Health					
Proposal Type:	New	Project Start Date: 04/01/2014		04/01/2014						
Lead Unit:	4205 - Health Promotion Sciences	Project End Date: 03/31/2019		03/31/2019						
Activity Type:	Research									
Project Title:	Intense physiotherapies to improve function in young children w	ith cerebral palsy 🔿								
Institutional Fields Conditionally Re	equired					?				
				ł	Award ID:	9				
			Origin	nal Institutional Pro	posal ID:	۹				

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)

	PI:	Burris R Duncan	Document ID:Status: 727314:FINAL
KC Award 😨	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 nodes (parent or child nodes) have a 1:1

Award

			relationship	to a financial a	ccount	time & money	expand all	collapse a
Docume	nt Overview		▼ hide					
Documer	1t Overview							
			* Description Organization Document Number	n: Duncan, NICHHD, 3009370 r:			Explanation:	۲
Funding	Proposals		▼ hide					
Current F	unding Prop	osals						?
	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

		* Requisitioner ID:	brduncan	Document ID:Status:	733047:FINAL
KC Subaward 😰		Requisitioner Unit:	Health Promotion Science	es Subaward ID:	41
		* Subrecipient:	Tucson Medical Center	Last Update:	2019-09-04 12:54:08.0 By sborchaloui
Subaward 🔺					
					expand all collapse all
Document Overview	▶ show				
Subaward	▶ show				
Funding Source	▼ hide				
Funding Source					?
Award Number:	Account ID:	Award status:	Sponsor ID:	Amount: Final E	Expiration Actions Date:
1 <u>Open award</u> medusa 007834-00001	3009370	Active	010791 : Eunice Kennedy Shriver National Institute of Child Health and Human Development	2,219,573.00 10/3	1/2020

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

		Document Id:	695915	Status:	Active - Open to Enrollment
	KC Protocol 💿	Initiator:Last Updated:	jwinters1 : 08:42 AM 02/18/2019	Submission Status:	Approved
		Protocol #:	1401195212	Expiration Date:	02/01/2020
	Protocol	•			
al Revie	2W	▼ hide			
al Revie	W				

She												
	* 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.										

Spec

Ad	ditional Informa	ation	▶ show							
Org	ganizations		► show							
Fu	nding Sources		▼ hide	▼ hide						
Fur	nding Sources		?							
* Funding * Funding Type Number		* Funding Number	* Source	Title	Actions					
1 Award 007834-00001		007834-00001	Eunice Kennedy Shriver National Institute of Intense Physiotherapies to Improve Function Child Health and Human Development in Young Children with Cerebral Palsy							

UAR – Common Identifiers

Proposal Development: usually a UAR doc number

- Always visible in Prop Dev
- Action List hyperlink



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

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

UAR – Common Identifiers

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



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

	Doc Nbr:	683114	Status:	FINAL	
	Negotiator Username:	mattsheeley	Negotiation ID:	45764	
Negotiation	Initiator:	<u>syswerda</u>	Created:	12:28 PM 11/30/2018	
Negotiation 45764				?	
*					

 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								
	I	PI: B	Burris R Duncan			Document ID:Status:	727314:FINAL		
	Lead Ur	it: H	Health Promotion Sciences			Award ID: Account:	007834-00001:	3009370	
	Sponsor Nam	e: E	Eunice Kennedy Shriver Nationa			Last Update:	08/05/19 by ride	dlea	
Details & Dates									
Details and Dates		-					view his	tory ?	
▼ hide Current Action									
Transaction Type:	Notice Date:		Comments:						
No Cost Extension			Internal NCE through 10/31/2020 🥏						
hide Institutio	'n								
Award ID: 007834-00001				Lead Unit ID:	4205	1205 - Health Promotion Sciences 💷			
Version:	15			Account Type:					
Award Status:	Active	Active		Activity Type: Res		arch			
Account ID: 3009370				Award Type:	Gran	t			
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		
I	Or	All		
&&	And	All		
>	Greater than			
<	Less than			
>=	Greater than or equal to	String,		
<=	Less than or equal to	number, date		
	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 empIID 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
 <u>sponsor@email.arizona.edu</u>
- Present a topic
 - Share research administration tools (reports, agents, etc.), lessons learned
 - Tips & tricks, coming changes, conferences

