December 18, 2019
Research Administration Forum
Agenda

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

• UAccess Financials Tips & Tricks
  • Financial Balance lookups
  • Financial Account inquiries
  • Related Analytics inquiries

• RA Forum Box folder - how to upload
  • Please upload and share your favorite tools

• Open Q&A and office hours
UAR – Medusa link from search results

Opens to Proposal Summary tab in Proposal Development
UAR – Why “Medusa”?

Proposal Development

(outgoing) Subaward

Institutional Proposal

IRB Protocol

Negotiation

Award
UAR – Medusa (default view Proposal > Award)

A summary of the current record is displayed with no navigation buttons.
UAR – Medusa (Award > Proposal 'refresh')
UAR – Medusa, jump to PD

Opens Abstracts and Attachments in another browser tab, Notes panel

## Development Proposal 10751

<table>
<thead>
<tr>
<th>Proposal No.</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>10751</td>
<td>Approved and Submitted</td>
</tr>
</tbody>
</table>

**Lead Unit:** 4205: Health Promotion Sciences

**Start Date:** 04/01/2014  **End Date:** 03/31/2019

**Title:** Intense physiotherapies to improve function in young children with cerebral palsy

**Proposal Type:** New

**NSF Code:** F.04: Other - Life Sciences

**Sponsor:** 010806 National Institutes of Health

**Prime Sponsor:**

<table>
<thead>
<tr>
<th>Sponsor Proposal No.</th>
<th>Activity Type</th>
<th>Program Title</th>
<th>Notice of Opportunity</th>
<th>Program No.</th>
<th>Attachments</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAR-11-260</td>
<td>Research</td>
<td></td>
<td></td>
<td></td>
<td>Complete</td>
<td>Complete</td>
</tr>
</tbody>
</table>

**Investigators:**

- Burris R Duncan (Principal Investigator)
- Theodore P Trouard
- Chengcheng Hu

**Units:**

- 0701: Medicine Administration
- 2328: Biomedical Engineering
UAR – Medusa, jump to IP Notes

Opens Inst Prop Notes and Attachments panel (signed submission documents)
UAR – Medusa, jump to Award Attachments

Opens Award Comments, Notes & Attachments panel (fully executed award documents)
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**
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). Award nodes (parent or child nodes) have a 1:1 relationship to a financial account.
UAR – Award / Subaward Links

- **Funding Source** links Awards in Subawards
- Additional navigation actions are also available
UAR – IRB Links

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

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

Example of an Action List link

- Proposal Summary link from a lookup and from the Proposal Routing Dashboard
UAR – Common Identifiers

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

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

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

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

Award “family” number: 007834-00001:3009370
### UAR – Wildcards and Operators in Searches

<table>
<thead>
<tr>
<th>Operator</th>
<th>Name</th>
<th>Data Type(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>*, %, ?</td>
<td>Wildcard</td>
<td>String</td>
</tr>
<tr>
<td></td>
<td>Or</td>
<td>All</td>
</tr>
<tr>
<td></td>
<td>And</td>
<td>All</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than</td>
<td>String, number, date</td>
</tr>
<tr>
<td>&lt;</td>
<td>Less than</td>
<td></td>
</tr>
<tr>
<td>&gt;=</td>
<td>Greater than or equal to</td>
<td>String, number, date</td>
</tr>
<tr>
<td>&lt;=</td>
<td>Less than or equal to</td>
<td></td>
</tr>
<tr>
<td>..</td>
<td>Greater than or equal to and less than</td>
<td></td>
</tr>
</tbody>
</table>

- * will match any number of characters
- ? matches one character
- All operators except .. should be before date values.
- Operator .. should separate date values
UAR – SPCS Staff Picks, Favorite Searches

• Award
  • Award ID: *-00001, Status: Active, Sponsor or PI: firstname*surname

• Negotiation
  • Account ID, Status: *In Progress*

• Maintenance main menu, Unit Administrator
  • Proposal approvers at the lead unit pre-approval, department or college levels
  • Unit Number: 0112|2412|1512, Unit Administrator Type Code: 16 (for all SNRE department approvers)
  • Unit Number: EDUC (for all college level approvers)

• Detailed doc search
  • Document Type: AwardDocument, Date Created From: 1/1/00, Title: *3009370*

• Fan Favorites? Stump the presenter?
Financial Balance Inquires for Sponsored Accounts

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

• Take the total
  • (Example $1,000)

• Divide it by 1.X, with the X as the F&A rate.
  • Example (1.535)

• $1,000 / 1.535 = 651.46
F&A Calculation with ERE

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

• $1,000 / 1.535 = $651.46 (salary and ere)
• $651.46 / 1.314 = $495.78 (salary that goes into the SET)
Account Inquires in Financials

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

• PEL with SET
  • A2 versus AC
• Sponsored Dashboards
• Creating a prompted link for sharing a filtered dashboard
Future Forum Topics?

• Suggest Future forum topics
  sponsor@email.arizona.edu

• Present a topic
  • Share research administration tools (reports, agents, etc.), lessons learned
  • Tips & tricks, coming changes, conferences