

 Research Foundation for SUNY

 Test Plans for SUNY PACS Grants

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| **Test Description:**  | 2. Test and validate to ensure that the PI are able to create a new budget without issues. |
| **Tester Location:**  |  |
| **Test Executed By:** |  |
| **Tester Email Address:** |  |

**Test 2: Create Budget**

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| Step | Test Steps | Data to Enter | Expected Results | Notes |
| 1 | Open browser and paste in https://pacsstg3.rfsuny.org/SponsoredPrograms/login |  | * The SUNY PACS website login page is presented.
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| 2 | Log in as **PIgrants1**(Test accounts have been provided) |  | * Log in is successful
* **Inbox** displays
 |  |
| 3 | Click the **Grants** tab at the top and then find the proposal you created in test plan 1 and click on the name |  | * List of proposal display
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| 4 | Click the **Budgets** Tab, next click the Funding Source **Name** on Working Budgets page for the Proposal you are adding a budget too. |  | * The Draft Budget page is displayed.
 | Note: The system automatically created a draft blank budget from the proposal |
| 5 | Click **Grid: Inflation and Indirect Rates** on the left of the workspace to review the inflation and indirect rates. To change indirect rates if necessary and/or verify the rate you want for the proposal:* The default cost base type and rate is based upon the proposal. To see the other cost base types available, click the down-arrow.
* To change the indirect cost rates, click in the rate field and type a new value.
* To copy a rate to subsequent periods, click the blue arrow to the right of the value. (since you have only one year you will not see this)

Click Apply and **OK** to save the changes and return to the budget workspace. | For testing purposes no changes needed, just verify the rate and baseSince one year budget you will not see this. | * Grid: Inflation and Indirect Rates are either verified or updated.
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| 6 | Click the **Edit Budget** Button on the left. |  | * The General Budget Information page is presented.
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| 7 | **General Budget Information Page:*** Questions 1.0, 2.0
* Question 3.0 **Budget Type:** Select **Project**. (A program project cannot be sent to Grants.Gov.)
* Question 4.0 **Is Modular Budget?** Select **“No”**.
* Question 5 **Sponsor Budget Detail Level:** Select **Full Details** (A detailed budget is required for proposals submitted via Grants.Gov.)

Verify the information is correct. Click Save & Continue. | **These fields auto populate.****‘Project’****‘No’****Full Details** | * The General Budget Information is saved and the Budget Characteristics page is now displayed.
 | **Note:** Most of the fields on this page are auto populated from the proposal. In general, the principal investigator, funding source, and project sponsor should not require updates here; change them in the funding proposal, if needed.  |
| 8 | **Budget Characteristics Page:*** Question 1.0 \* **Will this budget pay for participant/trainee costs?** (Leave as no.)
* Question 2.0 **Will this this Subaward/Subcontract research to another institution?**(You must enter **‘Yes’)**
* **Question** 3.0 **Will this budget have Cost Sharing?** Answer No as cost sharing will be covered in another test.

**Click Save and Continue.** | ‘**No’****‘Yes’****‘No’** | The Budget Characteristics are now saved and the Personnel Costs page is now displayed. | Note: By selecting ‘Yes’, the system will add a page for you to enter the subaward/subcontract organizations. The system will also create a subaward/subcontract budget for each organization that you must complete. Steps for completing subaward/subcontract budgets are covered in another test plan. |
| 9 | **Personnel Costs:**,* **Enter the Salary Cap** as defined in the application based on the sponsor.
* **Salary Inflation Rate will default, change if necessary.**
* **Apply Infl. Per. 1:** If this should be applied to Period 1, check the box.
 | **185,000** |  |  |
| 10 | **Personnel Costs Grid:** * **To add personnel to the grid:** In the first column, click the “add row” down arrow, select the number of personnel rows to add, and then click the **Add** button.
* **For each personnel row:** Complete all the fields listed in the first column:
1. **Person:** Select the Person from the list of values by clicking the down arrow to display the list of values.
2. **Appt:** Select Appt: (Appointment Period) by clicking the down arrow to display the list of values.
3. **Role:** Select the Role by clicking the down arrow to display the list of values.
4. **Key**: Check the box if this person is a Key.
5. **F & A Type**: will default.
6. **Apply Inflation Rate**: Check the box to Apply Inflation Rate if applicable.
7. **Base Salary ( if inflation applied):** Enter the Base Salary
8. **Fringe Category**: Chose the Fringe Category from the list of values by clicking the down arrow to display the list of values.

**In the Period Column Enter:**1. **Effort:** Enter the Percentage of Effort
2. **SalReq:** Salary Requested percentage.
3. **Base:** enter the Base salary
4. **Req**: Enter the salary amount requested.
5. **FB Rate:** The fringe benefit rate will default.
6. Click Save.
 | Chose the PI you are logged in as.9 monthPIThis will defaultThis will defaultBase Salary PI: 100,000SUNY-IFR20%20%102,00020,400 | The Personnel Costs Grid information has now been saved. Go to Step 11 to **Add** additional people (for this test) or Click **Continue** and the General Costs Grid will be displayed and go to Step 12. | Note: The system auto populates each period’s FB rate based on the fringe category selected (based upon only entering one year you will only have one column) |
| 11 | **Add** an additional row for CO-PD/PI and TBD to the budget repeating step 10 for each person. Click Save and Continue. | CO-PD/PIEffort: 10%Base: 102,00SalReq: 10,200TBDEffort: 100% SalReq: 100%Base: 20,000Req: 20,000 | * The Personnel Costs Grid information has now been saved and the General Costs Information will be displayed.
 |  |
| 12 | **General Costs****Inf Rate:** Lists the default inflation rate.**Apply Infl. Per. 1**: Check if applying inflation rate to period 1, for the purpose of this test, leave the box unchecked.**General Costs Grid:*** **To add a cost item to the grid:** In the first column, click the “add row” down arrow, select the number of rows to add, and then click the **Add** button.
* **For each row:** Complete all the fields listed in the first column, for example, select the cost type, type a description, type the unit cost, etc.
 | Cost Type: Materials & SuppliesDesc: Lab SuppliesUnit Cost: 1.00 and number of units 10,000Cost Type: Travel- DomesticDesc: Travel in US.Unit Cost: 1.00# Units: 2500 | Click Continue and the Subaward-Subcontractor Sites page will now display. |  |
| 13 | Subaward-Subcontractor Sites – Question 1* Click Add , Add Subcontractor form displays
* Name: Leave Blank for this test
* Organization: Type Cornell on the Organization line, Click Select, List of values displays, Chose Cornel University, Click Ok
* Question 2, leave blank.
* Click continue
 | Cornell University | * Note you have added the name of the subaward/subcontractor.
 |  |
| 14 | SF424 Subaward Import * Question 1, Ignore
* Question 2, Select Browse and select the document called ‘RR\_Budget\_1\_3\_A30-V1 3’.
* Click continue
 | Attachment: RR\_Budget\_1\_3\_A30-V13. | * Subaward pdf form is attached and imported.
 | Note: For testing, we are providing the budget attachment. |
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| 15 | On the Attachments for Internal Purposes screen (optional) Click Save and Finish. | Don’t load any attachments. | * You will be returned to the Financials Screen.
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| 16 | Click the **Subaward/Subcontract Tab**, Click the Subaward/Subcontract **Name,** click **Edit Budget** |  | * The Subaward/Subcontract Budget Information will now display.
 |  |
| 17 | * Questions 1.0 Defaults in information.
* Question 2, Defaults in information.
* Question 3.0 Budget Type, Select "Subaward”.
* Question 4,Leave PI default.
* Question 5.0 leave as 0.
* Question 6, select “PDF Import”,
* Click **Continue.**
 | SubawardPDF Import | * The Subaward/Subcontract Information is now saved.
 | Note: Select **PDF Import** for all Grants.Gov submissions. |
| 18 | Attachments for internal Purposes | Leave Blank and click continue | * Optional for additional attachments
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| 19 | You will be returned a financial screen showing the direct cost total for the subaward you imported for year 1 only |  | * Shows the total imported
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|  | End of Test |  |  |  |