

Research Foundation for SUNY

Test Plans for SUNY PACS Grants

|  |  |
| --- | --- |
| **Test Description:** | 19: CO Only- Test Ability for CO Specialist to Award Proposal and Create Funding Award |
| **Tester Location:** |  |
| **Test Executed By:** |  |
| **Tester Email Address:** |  |

**Test 19: CO Specialist Awards Proposal and Creates Funding Award**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Step | Test Steps | Test Data | Expected Results | Notes |
| 1 | Open browser and navigate to <https://pacsstg3.rfsuny.org/SponsoredPrograms/login> |  | * The SUNY PACS website login page is presented. |  |
| 2 | Log in as RFCO Finance/Grants Specialist  (Test accounts have been provided) |  | * Log in is successful * **Inbox** displays |  |
| 3 | **Search for the Proposal** that has been Awarded (Click on Grants tab on the Top)  Use the Filter by to search for your proposal, In the drop down you can search by the Name of the Proposal, PI Name, and Primary Sponsor.  Then in the next field enter the value you wish to search by, also wild Cards “%” can be used in the search. |  | * The proposal you are searching for will be displayed * Status is Pending Sponsor Review, Award Anticipated |  |
| 4 | **Award Letter Received**  On the left hand side click on Award Letter Received  Enter Sponsor Award ID  Actual Date of Sponsor Decision, click on Calendar  Total Award Amount.  Add any comments or Notes (Optional)  **Click Add**, Attach any sponsor award documents  **Click OK** | 999999  Click on current date.  Enter same as proposal grand total.  Enter: Sponsor approved budget as submitted amount.  Attachment 15 | * The Award Letter received form displays * Current state is Now **Award Notification Received** | **NOTE: Save and Continue along the way as you proceed thru the below steps**  **PreReq – Proposal exists in the above state** |
| 5 | **Create Funding Award**  Click on Create Funding Award on the left.  On the **Funding Award form** fill out the below fields;  **1.0** Award Title –defaults from Proposal but can be modified  **2.0** Principal Investigator - defaults from Proposal but can be modified  **3.0** Award Type – Defaults from proposal  **4.0** Select Instrument Type - defaults from Proposal but can be modified  **5.0** Award Structure - defaults from Proposal but can be modified  **6.0** Sponsor Award ID –Defaults from the Award letter received form  **7.0** Direct Sponsor - defaults from Proposal but can be modified  **8.0** Sponsor Award Date - defaults from Proposal but can be modified  **9.0** Approving Dept. and Admin Contact - defaults from Proposal but can be modified  **10.0** Date Notified of Award – Optionally Complete date  **11.0** Start Date - defaults from Proposal but can be modified  **12.0** End Date - defaults from Proposal but can be modified  **13.0** Award Documents – Optionally add any award documents | All information defaults from the proposal for questions 1.0 – 9.0.  11.0-12.0.  Change this information only if different in award notice.  10.0 Enter date notified of award  Click add, upload attachment 15 | * The Funding Award form will display * Data is updated | Note: Some fields were auto populated from the proposal; you can update any fields as needed |
| 6 | **Award Setup Information**  Complete the below fields as needed;  **1.0** Cumulative Awarded Amount –defaults from Award Notification but can be modified  **2.0** Funded Amount to Date - defaults to $0 but can be modified  **3.0** Indirect Cost Rate – Enter the rate  **4.0** Salary Cap - defaults to $0 but can be modified  **5.0** Does this Award include cost sharing – select yes or No | Enter No | * The Award Setup Information form is displayed * Data is updated |  |
| 7 | **Award Funding Proposals**  **1.0** Proposals Funded by this Award –defaults from Award Notification. |  | * The Award Funding Proposals form is displayed |  |
| 8 | **Terms and Conditions**  Optionally select any that apply   1. Terms and Conditions –Select any that apply 2. Special Terms and Conditions – **Click add**, Add any special terms and conditions. (Optional) NOTE: Clicking add opens another form to allow for Free form text to be added |  | * The Terms and Conditions form is displayed * Data is updated |  |
| 9 | **Project Award Budgets**  Click either Add, Update or Remove existing Budget Periods. (Optional)  **Click** on **UPDATE** to open the Edit Funding Allocation Form |  | * The Edit Funding Allocations form displays | Note: You can set up allocations and reconcile them to budget periods either while you are setting up an award or  afterward. Once an award is activated, you must create an award modification to change the award. |
| 10 | **Edit Funding Allocations**  Click on Update for each award period.  On the **Edit Funding Allocations form** fill out the below fields;  **1.0** Name –defaults from Proposal but can be modified  **2.0** Description – Optional free form field  **3.0** Associated Funding Proposal – Defaults from proposal  **4.0** Account - NOT USED BY RF  **5.0** Start Date - defaults from Proposal but can be modified  **6.0** End Date –Defaults from the Award letter received form  **7.0** Sponsor award ID - defaults from Award letter received but can be modified  **8.0** Period Number - defaults to 1 and then sequential for next period  **9.0 Indirect Rate:** The indirect rate will be used for indirect rate calculations on the reconciliation page.  **10.0** Authorized – Select yes or No  Enter the awarded direct and Indirect amounts for the period.  **Click Continue** | Use Defaults | * Data excepted | Note: If there is a split in the award funds for a period, for example, multiple departments  splitting the funds, the allocations will be grouped by the period number.  Note: Yes” means the sponsor has authorized spending of the allocation. Only allocations with “Yes” will be available to reconcile with a budget period.  “No” means the amount is a future allocation that must be awarded. |
| 11 | **Award/Authorized Budget Reconciliation**  Import the Funding Allocation Budgets for each period Created.  In the LOV **Select the Funding Allocation to display** select an award period. (The drop-down shows only allocations you’ve authorized in the edit funding allocation form.)  This will now display an additional budget form. Select **IMPORT** in the middle of the screen. Check the Period you wish to import.  **Repeat the above import process for each period.**  **Edit** each period budget in the adjustment column as needed if there is a difference between the award amount to date and an authorized amount to date in the top right of screen.  Repeat the above steps to reconcile other budget period amounts to award allocations  **Click OK and SAVE** |  | * Budget form is now loaded and reconciled. |  |
| 12 | **Deliverables**  Not used at the RF | Skip | * Skip this form |  |
| 13 | **Compliance Review**  Optionally enter any compliance restrictions or select yes or no on Question 1.0 |  | * Data updated as needed |  |
| 14 | **Completed Award**  In the toolbar, select "Hide / Show Errors" to validate that the form is complete. Update any errors or incomplete sections.  If no errors are found select **Finish** to complete the award setup. |  | * Award process is complete and user is returned to the main Award page. |  |
| 15 | **Activate the Award**  On the left hand side click on ACTIVATE  **Click OK** |  | * Award state is now Active |  |
| 16 | **Verify that Proposal shows as Awarded**  In the middle of the award screen click on the link to the proposal. |  | * Proposal is now in the state of Awarded |  |
| **End of Test** |  |  |  |  |