

Research Foundation for SUNY

Test Plans for SUNY PACS Grants

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| **Test Description:** | 4. Test and validate to ensure that the PI are able to create a per period budget on the proposal with cost share (NOTE ON A PER PERIOD GRID THE F&A DOES NOT AUTOMATICALLY CALCULATE YOU ENTER THE AMOUNT ON THE BUDGET GRID) |
| **Tester Location:** |  |
| **Test Executed By:** |  |
| **Tester Email Address:** |  |

**Test 4: Create Budget with Cost Share**

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| Step | Test Steps | Test Data | Expected Results | Notes |
| 1 | Open browser and past in <https://pacsstg3.rfsuny.org/SponsoredPrograms/login> |  | * The SUNY PACS website login page is presented. |  |
| 2 | Log in as **GrantsPI1**  (Test accounts have been provided) |  | * Log in is successful * **Inbox** displays |  |
| 3 | **NOTE: Save and Continue along the way as you proceed thru the below steps**  Click on Grants(tab on the Top), Open Proposal created in test case #3 (This should be listed in the first page where all the proposals are listed)  **Select the Budget and Open.** | Use this proposal with this title :Your Name test 3 non Grants.gov Proposal | * The proposal page will display |  |
| 4 | **Add or Modify the IDC Rates or Inflation**  Click on the link “Grid: Inflation & Indirect Rates on the left of the workspace to review the inflation and indirect rates. |  | * Rate and Inflation form appears |  |
| 5 | **Rate and Inflation Grid**  Remove or Add the Cost Base Type based on the budget entered on budget form   * The default cost base type is MTDC. To see the other cost base types available, click the down arrow. Contact the Sponsored Programs Office to change the default. * 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.   Optionally change the inflation rates  Hit Apply and OK to make the changes to the budget form | Leave the default of MTDC.  Leave the default indirect cost rates for this test.  Leave inflation rates as set up for this test. | * Updated Budget form appears |  |
| 6 | Click on the Budgets Tab at the top of the proposal. Then click on the name to Open up the Budget Form. Click on the EDIT BUDGET button on the left. |  | * The General Budget Information Form will now be displayed. | Note: Complete the pages, paying attention to the fields listed below. Click **Continue** in the Navigation Bar to move through the pages. Required fields are marked with an asterisk (\*). |
| 7 | **General Budget Information form**  Question 1.0 **This defaults in by can be changed as needed**  Question 2.0 PI Name – Defaults but can be changed  Question 3.0 Budget Type  Question 4.0 Funding Source and Project Sponsor  Is Modular Budget select NO  Question 5.0 Sponsor Budget Detail Level | Leave the default.  Leave the default PI you logged in as.  Select Project  Values Default  Select No  Select Per Period, Budget Category Totals | * Values are populated and saved. | Note:  Budget Type is always project unless this budget is part of a program project.  For Sponsor Budget Detail Level, “Full Details” only applies to proposals submitted via Grants.Gov.) |
| 8 | **Budget characteristics form**  Question 1.0 **Trainee/Participant Costs**  Question 2.0 **Subawards budgets**  Question 3.0 Select Yes for Cost Sharing   * Add a cost sharing Department | Select Yes  Select No  Select Yes  Chose any department for the LOV for this test. | * Fields updated and cost sharing Dept. added. | Note**: Subawards**  If you selected yes to subawards, the system will add a page for you to enter the Subaward/Subcontract organizations and create a budget for each organization that you must complete.  **Cost Sharing**  If you select yes to cost sharing, the system will create a cost sharing budget you must complete. |
| 9 | **Budget Per Period Cost Totals Grid**  Enter Budget amounts for salaries, Fringe, Participant costs, participant travel and any other categories. | Enter Salary  100,000  Enter Fringe Benefits 58,000  Enter Participant Costs 10,000  Participant Travel 2,000  Enter 5,000 in Materials and Supplies | * Budget created for all 4 periods | Note: To copy values from the first period to subsequent periods, click the blue right arrow next to that field, otherwise, click in the field for a period and type the amount. |
| 10 | **Attachments for Internal purposes**  Question 1.0 Add any attachments as needed **(Optional)** | Attach – attachment 9 | * Attachments uploaded. |  |
| 11 | Click FINISH |  | * A completed budget form displays in a spreadsheet version. |  |
| 12 | **Add Cost Sharing Budget**  At the main Proposal screen click on the Budgets tab on the top |  | * The working Budgets form displays |  |
| 13 | **Working Budgets form**  You Now have 2 budgets displayed; proposal budget and cost share budget.  Click on the cost share budget | Click on budget name that starts with Cost Sharing for (the sponsor you chose) | * Cost share budget form displays |  |
| 14 | **Cost Sharing Budget Form**  Click on EDIT Budget (top left hand of screen) |  | * General Budget Information screen appears |  |
| 15 | General Budget Information form  Question 1.0 **This defaults in by can be changed as needed**  Question 2.0 PI Name – Defaults but can be changed  Question 3.0 Budget Type  Question 4.0 Funding Source and Project Sponsor – Values Default  Is Modular Budget  Question 5.0 Sponsor Budget Detail Level – | Leave the default value.  Leave the default name. Select Cost Sharing  Leave default value.  Select NO  Select Per Period, Budget Category Totals | * Values are populated and saved * Budget Characteristics form displays | Note: For Grants.Gov submissions, select **Full Details**. Otherwise, select **Per Period, Budget Category Totals**. |
| 16 | **Budget Characteristics**  Question 1.0 Required – select yes or no | Select Yes for this test. | * Fields updated |  |
| 17 | **Budget Per Period Cost Totals Grid Displays**  Enter Budget amounts for Personnel Salaries and Wages, Personnel Fringe Benefits, Equipment, Materials and supplies, Animal Care and Tuition and any other categories.  Note: You can use the arrow next to the amount to automatically populate the amount to the future periods | Enter 20,000 for Salaries & Wages  Enter 5000 for Fringe Benefits  Enter 2, 000 for Participant /Trainee Support Costs  Enter 500.00 for Materials and Supplies  Enter 15,950 for Indirect Costs. | * Budget created for all 4 periods |  |
| 18 | Attachments for Internal purposes  Question 1.0 Add any attachments as needed **(Optional)** | Attach –attachment 10 | * Attachments uploaded |  |
| 19 | Click FINISH |  | * A completed budget form displays in a spreadsheet version. |  |
| 20 | **Submit for Department Review**  From the Budget screen click on the Proposal Name in the top left of screen to return to the proposal Information Page  On the Left hand side of the Page **click Submit for Department Review**  The Submit for Department Review screen displays, check the appropriate certification.  **Click OK** | For this test, check the first box for the PI/PD submission. | * Submitted for review * On the main proposal screen the workflow now shows in internal review |  |
| **End of Test** |  |  |  |  |