



## Kuali Coeus Research Management (KCRM) User Guide: Print FDP Template and Attachments

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**Version 1.1: June 2015**

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**Purpose:** To print templates and attachments for outgoing Subaward agreements

**Trigger / Timing / Frequency:** Once a subaward record has been created and the subaward record is updated, saved, then submitted.

### Prerequisites

- The Prime award should be set up in KCRM
- Subaward record needs to be created (Refer to Create Subaward User Guide)
- For accurate population of Subrecipient organization and contact data, the KC Address Book needs to be updated with contact information accordingly

**User Group Roles:** Subawards

**Menu Path:** Central Admin > Subawards

**Tips and Tricks:** Only files that are uploaded as PDF's can be printed from the Subaward Actions tab. The Subaward agreement would be printed after the first initial transaction has been entered. Subsequent entries of financial information into the Financial tab would be considered a Modification/Amendment to the initial agreement, and therefore would require the selection of the Subaward Modification to be printed from the Subaward Actions tab.

**Results and Next Steps:** Once all of the tabs have been completed you may proceed to the Subaward Actions tab and generate Subaward agreement templates. The templates will reflect information that was entered in the other tabs. All templates can be reprinted.

### Process:

Specify all or select portions of this Subaward document to be included in the generated FDP Agreement, and then click the [print] button to create the PDF which you can download/save and then print locally. The Printed Agreement once signed by all parties will become the executed agreement.

*Note: Only the following attachments that are uploaded through the Template Information tab Attachments panel will be available to be printed for the Subaward Tab:*

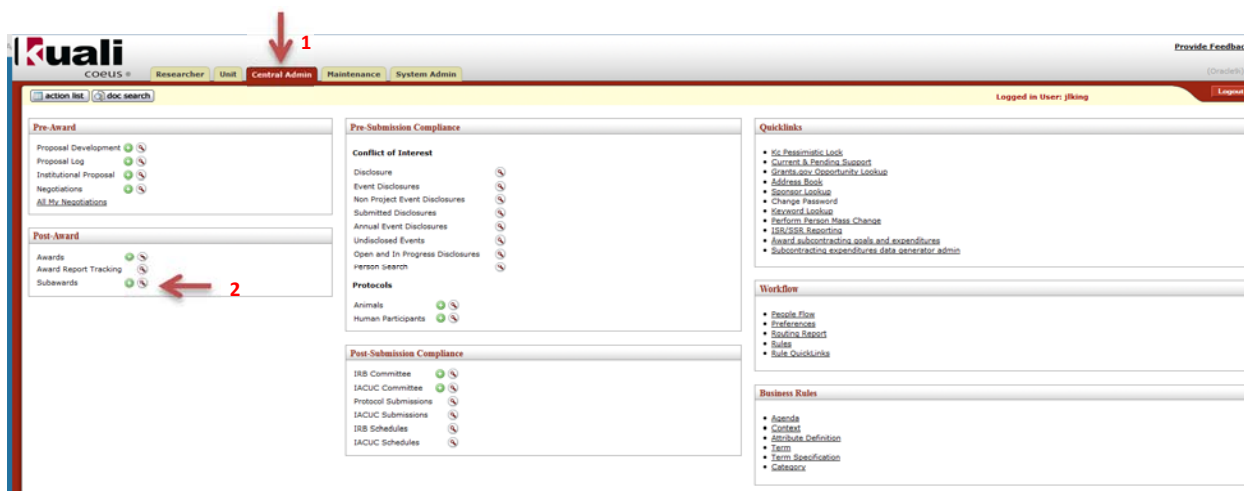
1. Attachment 2A
2. Attachment 3B
3. Attachment 4
4. Attachment 5: SOW and Budget
5. Other

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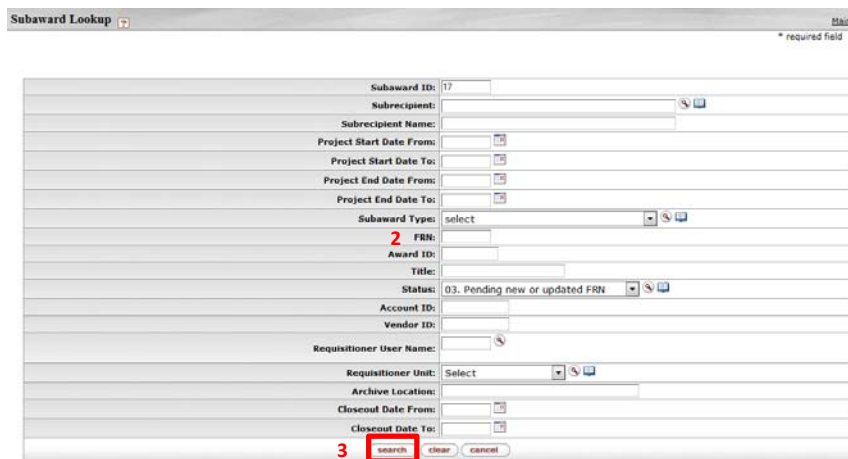
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A. Search for existing subaward record

Click on the 1) Central Admin tab and then search for the subaward for which you'd like to print by clicking the 2) magnifying glass next to Subawards.



On the 1) Subaward Look up Screen, enter one or more 2) criteria for the award to narrow your search results. Click 3) Search.



Scroll down on the same page to view the results of your search. Review the returned subawards and look for the appropriate subaward. Identify the subaward 1) and click on 2) Open.

One item retrieved.

Actions	Requisitioner	Subaward ID	Subrecipient	Subrecipient Name	Project Start Date	Project End Date	Subaward Type	FBN	Title	Subaward Status	Account ID	Vendor ID	Requisitioner Unit	Archive Location	Closout Date
2	medusa	HITESH TADU	17	300345	Boston Life Science	01/01/2015	12/31/2017	Clinical Trial Agreement	1234567	X: Testing - 10.21 updated	03_Pending_new_or_updated_FSN		Medical Campus		

Export options: CSV | spreadsheet | XML

The Subaward opens up in a non-editable state. If edits are required prior to printing, click on the 3) Edit button to make changes to the subaward record.

Funding Source hide

	Award Number:	Sponsor Award ID:	Investigator:	Account ID:	Award status:	Sponsor ID:	Amount:	Obligation End Date:	Actions
1	Open award medusa 201270-00003 Ver. 5	SUM1AR063386-02	THOMAS A EINHORN	9500302735	Approved Award	301048 : NIM/National Institute of Arthritis & Musculoskeletal & Skin	257,997.00	08/31/2014	

Contacts hide

	* Person or Organization	* Project Role	Office Phone	Email	Actions
1	Pfeifer, Rebecca	Subaward Administrative Contact 1	412-359-3137	rpfeife1@wpahs.org	
2	Vandermel, Courtney J.	Prime Administrative Contact	617-638-4600	buprimeubs@bu.edu	
3	Marron, Jennifer	Prime Authorized Official	617-353-4365	jmarron@bu.edu	
4	Zhang, Sophia	Prime Financial Contact	617-353-4555	qsizhang@bu.edu	

Closout show

3 edit close



**Reference** Create Subaward User Guide for instructions on editing the subaward records prior to printing.

B. Navigate to Subaward Actions tab > Print Panel

Click on the 1) Subaward Actions tab and use the 2) Show/Hide button to expand the Print panel.

1

Subaward Financial Custom Data Template Information Subaward Actions Medusa

Document was successfully reloaded.

Data Validation show

Print show 2

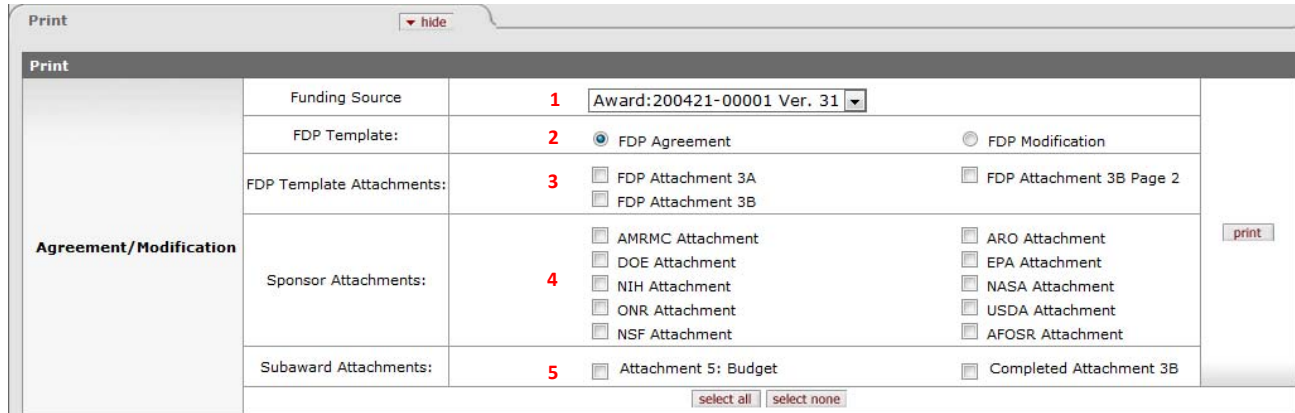
Route Log show

C. Make selections in Print panel

Specify all or select portions of this Subaward document to be included in the generated FDP Agreement, Modification or Sponsor Templates.



The 1) Funding Source is based on the awards linked on the Subaward Tab > Funding Source panel. If multiple awards are linked, then the pull down will provide you the ability to select which award information will populate into the templates.



Print		hide
Agreement/Modification	Funding Source	1 Award:200421-00001 Ver. 31
	FDP Template:	2 <input checked="" type="radio"/> FDP Agreement <input type="radio"/> FDP Modification
	FDP Template Attachments:	3 <input type="checkbox"/> FDP Attachment 3A <input type="checkbox"/> FDP Attachment 3B Page 2 <input type="checkbox"/> FDP Attachment 3B
	Sponsor Attachments:	4 <input type="checkbox"/> AMRMC Attachment <input type="checkbox"/> ARO Attachment <input type="checkbox"/> DOE Attachment <input type="checkbox"/> EPA Attachment <input type="checkbox"/> NIH Attachment <input type="checkbox"/> NASA Attachment <input type="checkbox"/> ONR Attachment <input type="checkbox"/> USDA Attachment <input type="checkbox"/> NSF Attachment <input type="checkbox"/> AFOSR Attachment
	Subaward Attachments:	5 <input type="checkbox"/> Attachment 5: Budget <input type="checkbox"/> Completed Attachment 3B
		<input type="button" value="print"/>
		<input type="button" value="select all"/> <input type="button" value="select none"/>

Data Quality	SOP Definition / Use	Required
1) Funding Source	Select the linked award in which the templates should pull information from. This is based on your input to Subaward tab > Funding Source panel.	Yes
2) FDP Template	Use the radio button to select either the FDP Agreement (which is the Cost Reimbursement Agreement template) or the FDP Modification template.	Yes
3) FDP Template Attachments	Use the checkboxes to select one or many FDP Template Attachments that you would like to include.  <i>Note: Attachment 3B and 3B Page 2 will not be used for BU's rollout and does not need to be checked.</i>	
4) Sponsor Attachments	Use the checkboxes to select one of the applicable Sponsor Attachments that you would like to include.	
5) Subaward Attachments	PDF Attachments that have been uploaded to this Subaward record will be available here to print [Template Information tab > Attachments panel].  Use the checkboxes to select one or many of the Subaward Attachments that you would like to include.	




The Attachment Type selected when uploading the Subaward Attachments on the Template Information tab > Attachments panel will determine whether or not the document will be available to 'Print' with the other template documents.

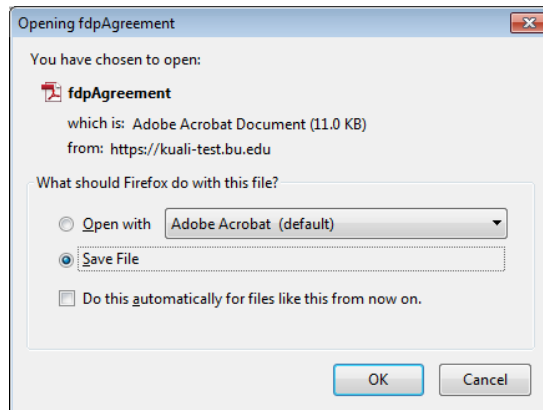


**Reference** Create Subaward User Guide – Step H for more information on uploading attachments.

D. Click Print button

Click the  button to create the PDF which you can download/save and then print locally. Depending on your web browser settings, you will be prompted to either open or save the PDF document created, based on your selections.

Sample dialog box when using Firefox web browser:




Note: All PDF pages will print together in one document.



**KCRM Document Action Command Buttons Definitions**

**Submit** Moves the document (through workflow) to the next step in the process. Once a document is submitted, it remains in 'ENROUTE' status until all approvals have taken place. If there is no workflow for a specific document, the budget version will be placed in "To Be Posted" status.

- Cancel** Denotes that the document is void and should be disregarded. Canceled documents cannot be modified in any way and do not route for approval. They may be copied, however, to a new document.
- Reload** Refreshes the budget and displays the most recently saved information. Changes which are made but not saved prior to reloading a page are not maintained.
- Close** Signifies that you wish to exit the document. The system displays a message asking if you want to save the document before closing. No changes to Action Requests, Route Logs or document status occur as a result of a Close action. If you initiate a document and close it without saving, it is the same as canceling that document.



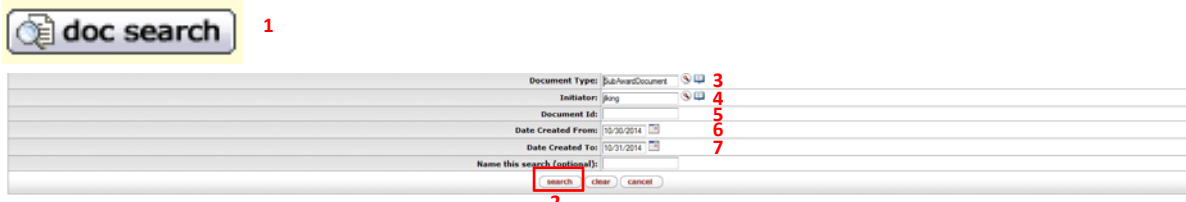
**Reference** the Print Template and Attachments Mapping Document, which identifies the source of data for each template/attachment generated.

E. Print a template from a previous version of a subaward document

Because certain components (dates, dollars) of the FDP Agreement and FDP Modification templates print based off of the most recent information entered into the Financial > History of Changes, there may be an instance where you need to generate a template based off a previous version of the subaward record.

In order to do this, you must search for the previous version through Doc Search.



Click on the **1)** doc search button in the top left corner and use the **2)** Search options to locate the past document version. Note: Initial view is 'basic' search. Use known values to narrow your search.



7 items retrieved, displaying all items.

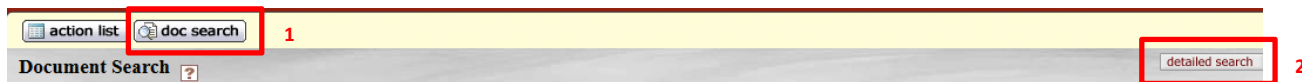
Document Id	Document Type	Title	Status	Initiator	Date Created	Route Log
322752	KC Subaward	KC Subaward - JK Testing - for mapping document	FINAL	KING, JENNIFER.L	10/31/2014 09:52 AM	
322752	KC Subaward	KC Subaward - JK Testing - for mapping document	FINAL	KING, JENNIFER.L	10/30/2014 04:10 PM	
322729	KC Subaward	KC Subaward - JK Testing - for mapping document	FINAL	KING, JENNIFER.L	10/30/2014 09:35 AM	
322728	KC Subaward	KC Subaward - JK Testing - for mapping document	FINAL	KING, JENNIFER.L	10/30/2014 09:09 AM	
322728	KC Subaward	KC Subaward - JK Testing - for mapping document	FINAL	KING, JENNIFER.L	10/30/2014 09:08 AM	
322712	KC Subaward	KC Subaward - JK Testing - for mapping document	FINAL	KING, JENNIFER.L	10/30/2014 08:55 AM	
322709	KC Subaward	KC Subaward - SubMod UATesters	FINAL	KING, JENNIFER.L	10/30/2014 07:56 AM	






Export options: CSV | spreadsheet | XML

Search capabilities	Use
3) Document Type	When searching for a past Subaward document, the following can be entered: SubAwardDocument or use the  Lookup function.
4) Initiator	If you know who initiated the document, enter their username or use the  Lookup function.
5) Document ID	If you had noted the Document ID, search on this 6 digit number.
6) Date Created From	Use these dates fields if you have an idea on when the previous document version was created.
7) Date Created To	

If you don't have enough known information to easily find the past version document, try using the 'Detailed Search' doc search capabilities where you can then search on additional fields, including **Title**.

Click on the **1)** doc search button in the top left corner and click the **2)** Detailed Search button. Use known values to narrow your search.



Document Type:	SubAwardDocument 
Initiator:	<input type="text"/> 
Approver:	<input type="text"/> 
Viewer:	<input type="text"/> 
Group Viewer Id:	<input type="text"/> 
Document Id:	<input type="text"/>
Application Document Id:	<input type="text"/>
Document Status:	<div style="border: 1px solid gray; padding: 2px;">             Pending Statuses              - INITIATED              - SAVED              - ENROUTE              - EXCEPTION           </div>
Route Node:	<input type="text"/>
Route Node Logic:	Exactly <input type="text"/>
Date Created From:	<input type="text"/>
Date Created To:	<input type="text"/>
Date Approved From:	<input type="text"/>
Date Approved To:	<input type="text"/>
Date Last Modified From:	<input type="text"/>
Date Last Modified To:	<input type="text"/>
Date Finalized From:	<input type="text"/>
Date Finalized To:	<input type="text"/>
Title:	<input type="text"/>
Name this search (optional):	<input type="text"/>
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

Once you have located the past version of the Subaward document you'd like to print from, navigate to Subaward Actions > Print as described above in Steps A-D.