



Kuali Research User Guide: Print FDP Template and Attachments

Version 2.0: November 2016

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, and 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 Kuali Research 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 non-fillable 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:

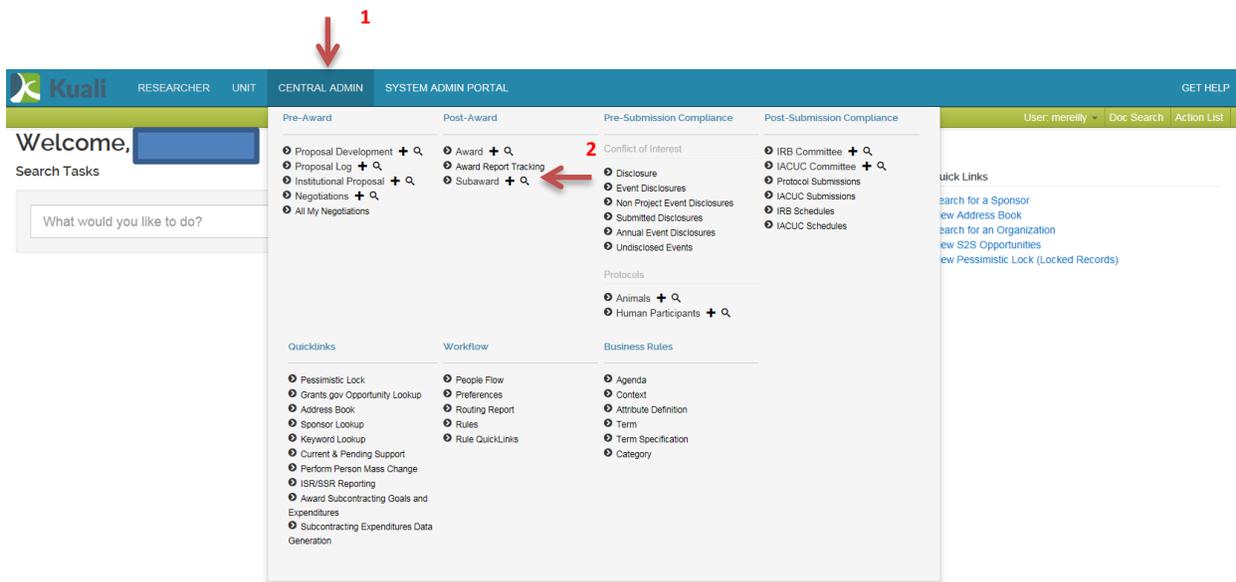
1. Attachment 2A
2. Attachment 3B
3. Attachment 4
4. Attachment 5: SOW and Budget
5. Other

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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.

Subaward Lookup

* required field

Subaward ID:

Subrecipient:

Subrecipient Name:

Project Start Date From:

Project Start Date To:

Project End Date From:

Project End Date To:

Subaward Type: select

FRN:

Award ID:

Title:

Status: select

Account ID:

Vendor ID:

Requisitioner User Name:

Requisitioner Unit: Select

Archive Location:

Closeout Date From:

Closeout Date To:

2

3

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.

1,065 items retrieved, displaying 1 to 100. [First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]

Actions	Requisitioner	Subaward ID	Subrecipient	Subrecipient Name	Project Start Date	Project End Date	Subaward Type	FRN	Title	Subaward Status
2 <input type="button" value="open"/> <input type="button" value="medusa"/>	PHYLLIS B COHEN	1150	301635	Northeastern University	05/17/2013	08/31/2017	Subgrant	4500001270	Minimally Verbal ASD: From Basic Mechanisms to Innovative Intervention...	07. Executed
<input type="button" value="open"/> <input type="button" value="medusa"/>	COURTNEY JEAN VANDERMEL	1155	300764	East Boston Neighborhood Center			Subgrant	4500001272	SBIRT to Benefit Emergency Department Patients with Substance Abuse Pr...	07. Executed
<input type="button" value="open"/> <input type="button" value="medusa"/>	COURTNEY JEAN VANDERMEL	1157	300368	Brigham & Women's Hospital	06/01/2013	05/31/2014	Subgrant	4500001277	Development of Klotho Enhancers as Novel Therapeutics for AD	07. Executed
<input type="button" value="open"/> <input type="button" value="medusa"/>	COURTNEY JEAN VANDERMEL	1158	301677	Oregon Health Science University			Subgrant	4500001278	Role of Myosin 1C in Adaption in the Inner Ear	07. Executed
<input type="button" value="open"/> <input type="button" value="medusa"/>	PHYLLIS B COHEN	1161	302785	Atlantic Offshore Lobstermen's Assoc.	04/01/2013	03/31/2014	Subgrant	4500001281	Genetic Analysis of Lobster Population Differences Among 28 US Inshore...	07. Executed
<input type="button" value="open"/> <input type="button" value="medusa"/>	COURTNEY JEAN VANDERMEL	758	302287	University of California, Davis			Subgrant	4500001150	Study of Attitudes and Factors affecting Infancy Care	07. Executed
<input type="button" value="open"/> <input type="button" value="medusa"/>	COURTNEY JEAN VANDERMEL	790	302824	Medical Center Of Arlington	08/01/2009	07/31/2014	Subgrant	4500001223	Study of Attitudes and Factors Affecting Infant Care	07. Executed
<input type="button" value="open"/> <input type="button" value="medusa"/>	COURTNEY JEAN VANDERMEL	802	302823	Mcmaster University	09/15/2012	08/31/2016	Subgrant	4500001235	Hip Fracture Evaluation Alternatives of Total Hip vs Hemiarthroplasty...	07. Executed

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

Funding Source

Award Number:	Sponsor Award ID:	Investigator:	Account ID:	Award status:	Sponsor ID:	Amount:	Obligation End Date:	Actions
Current Funding Sources ?								
show	103269-00002	NAKFI CS19	H EUGENE STANLEY	9550231408	Closed	301522 : National Academy of Sciences	50,000.00	12/31/2013 Open award medusa

Contacts hide

Contacts

* Person or Organization	* Project Role	Office Phone	Email	Actions
1 Baldwin, Diane	Prime Administrative Contact	617-353-4365	dbaldwin@bu.edu	

Closeout 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. expand all collapse all

Data Validation show

Print **2** show

Route Log show

close

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

Print

	Funding Source	1	Award:103269-00002 Ver. 6 ▼
	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 <input type="checkbox"/> FDP Attachment 3B Page 2
Agreement/Modification			print
	Sponsor Attachments:	4	<input type="checkbox"/> NSF Attachment <input type="checkbox"/> EPA Attachment <input type="checkbox"/> ONR Attachment <input type="checkbox"/> USDA Attachment <input type="checkbox"/> NASA Attachment <input type="checkbox"/> NIH Attachment <input type="checkbox"/> DOE Attachment <input type="checkbox"/> AFOSR Attachment <input type="checkbox"/> AMRMC Attachment <input type="checkbox"/> ARO Attachment
	Subaward Attachments:	5	select all 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.

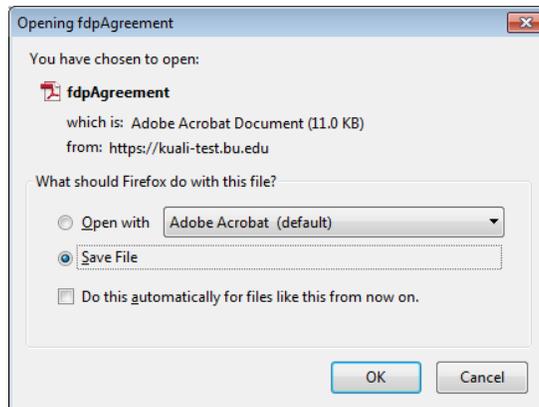


Reference Create Subaward User Guide – Step H for more information on uploading attachments.

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.



Kuali Research 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.

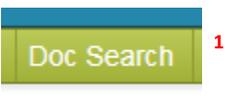
	<p>Reference the Print Template and Attachments Mapping Document, which identifies the source of data for each template/attachment generated.</p>
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E. Print a template from a previous version of a subaward document

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 right 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.



Document Search

* required field

[detailed search](#) | [superuser search](#) | [clear saved searches](#) | Searches

3 Document Type:

4 Initiator:

5 Document Id:

6 Date Created From:

7 Date Created To:

Name this search (optional):

44 Items retrieved. displaying all items.

Document Id	Document Type	Title	Status	Initiator	Date Created	Route Log
458619	KC Award	KC Award - MR TEST AWARD	FINAL	REILLY, MEGHAN E	11/01/2016 09:09 AM	
458603	KC Subaward	KC Subaward - MR TEST Sub award 11/1/2016	SAVED	REILLY, MEGHAN E	11/01/2016 07:35 AM	
458597	KC Subaward	KC Subaward - MR TEST Sub	SAVED	REILLY, MEGHAN E	10/31/2016 04:37 PM	
458537	KC Award	KC Award - MR TEST	SAVED	REILLY, MEGHAN E	10/30/2016 08:14 PM	
458535	Award Budget Document	Award Budget Document - MR TEST BUDGET	SAVED	REILLY, MEGHAN E	10/30/2016 03:59 PM	
458467	Award Budget Document	Award Budget Document - TEST BUDGET	SAVED	REILLY, MEGHAN E	10/28/2016 01:57 PM	
458465	KC TimeAndMoney	KC TimeAndMoney - timeandmoney document	FINAL	REILLY, MEGHAN E	10/28/2016 01:54 PM	

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 the 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 right corner and click the **2)** Detailed Search button. Use known values to narrow your search.

User: Doc Search **1**

Document Search

* required field

2 detailed search | [superuser search](#) | [clear saved searches](#) | Searches

Document Type:

Initiator:

Document Id:

Document Search

* required field

[Basic search](#) | [Advanced search](#) | [Clear saved searches](#) |

Document Type:  

Initiator:  

Approver:  

Viewer:  

Group Viewer Id: 

Document Id:

Application Document Id:

Document Status:  

Pending Statuses

- INITIATED
- SAVED
- ENROUTE
- EXCEPTION

Date Created From:  

Date Created To:  

Date Approved From:  

Date Approved To:  

Date Last Modified From:  

Date Last Modified To:  

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.