

# Working in a Remote World

Overview of systems used for proposal development/award lifecycle



**Northeastern  
University**

# *Tools/systems used at Northeastern in the lifecycle of an award*

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## *Presenters:*

- Marlon Sanchez: NU-RES Admin
- Steven Dorsey: NU-RES Admin
- Amanda Mello: NU-RES Admin
- Fiorella Chavez: NU-RES Finance
- Jeff Bonda: NU-RES Finance/Hub

# ***Tools/systems used at Northeastern in the lifecycle of an award***

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## *Proposal and Award Routing/Research Contracts/Conflict Disclosure*

<b>System</b>	<b>Description</b>	<b>How to Request Access</b>	<b>Link for Access</b>	<b>Contact for Support</b>
ePAWs 1.0 changes or updates	Additions, updates, changes, deletions to ePAWs 1.0 roles, sponsors, subaward orgs, request sponsored accounts, department/unit access, etc.	Contact the NU-RES Help Center using the form to request help with a role, sponsor, etc.	<a href="#"><u>NU-RES Help with Roles/Sponsor/Affiliations</u></a>	<a href="#"><u>NU-RES Help Center</u></a>

# ***Tools/systems used at Northeastern in the lifecycle of an award***

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## *Proposal and Award Routing/Research Contracts/Conflict Disclosure*

<b>System</b>	<b>Description</b>	<b>How to Request Access</b>	<b>Link for Access</b>	<b>Contact for Support</b>
eCLAWs	An automated, real-time, accurate and flexible contract workflow system that enhances the University's ability to submit, review, approve and manage contracts (eCLAWs: Electronic Contract and Legal Agreement Workflow System)	All Northeastern Employees are automatically granted the eCLAWs Submitter role	<a href="#">eCLAWs</a>	<a href="#">NU-RES Help Center</a>

# ***Tools/systems used at Northeastern in the lifecycle of an award***

## *Proposal and Award Routing/Research Contracts/Conflict Disclosure*

<b>System</b>	<b>Description</b>	<b>How to Request Access</b>	<b>Link for Access</b>	<b>Contact for Support</b>
eCD	An automated, real-time, accurate and flexible conflict disclosure system that enhances the University's ability to manage potential conflicts within a wide range of critical functions (eCD: electronic Conflict Disclosure)	Northeastern Employees that are required to disclose are granted the eCD Discloser role; to request the role, contact the NU-RES Help Center	<a href="#">eCD</a>	<a href="#">NU-RES Help Center</a>
<b>System</b>	<b>Description</b>	<b>How to Request Access</b>	<b>Link for Access</b>	<b>Contact for Support</b>
Coeus	Legacy system / backend database for ePAWs 1.0; used for department award view and for uploading JIT Documents	Contact the NU-RES Help Center	<a href="#">Coeus</a>	<a href="#">NU-RES Help Center</a>

# *Tools/systems used at Northeastern in the lifecycle of an award*

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## *Online Resources*

System	Description	How to Request Access	Link for Access	Contact for Support
Sharepoint	SharePoint empowers community members to share and manage content, knowledge, and applications among teams and across the organization.	Open Access	<a href="#">NU-RES</a>	Email <a href="mailto:NU-RES@northeastern.edu">NU-RES@northeastern.edu</a>
System	Description	How to Request Access	Link for Access	Contact for Support
QuickCards	Job aids to assist in quickly acclimating to use of a system	Open Access	<a href="#">QuickCards</a>	<a href="#">NU-RES Help Center</a>

# ***Tools/systems used at Northeastern in the lifecycle of an award***

## *Proposal and Award Routing/Research Contracts/Conflict Disclosure*

<b>System</b>	<b>Description</b>	<b>How to Request Access</b>	<b>Link for Access</b>	<b>Contact for Support</b>
NU-RES Transaction Tracking Log	Tracks/Captures transactions for award setups & non-financial post award tasks	Email <a href="mailto:NU-RES@northeastern.edu">NU-RES@northeastern.edu</a>	<a href="#">FY2022 Tracking Log</a>	Email <a href="mailto:NU-RES@northeastern.edu">NU-RES@northeastern.edu</a>
<b>System</b>	<b>Description</b>	<b>How to Request Access</b>	<b>Link for Access</b>	<b>Contact for Support</b>
Sub Invoice Tracker	Sharepoint Excel tracking log for subrecipient invoices maintained by the Subaward Manager	Email <a href="mailto:NU-RES@northeastern.edu">NU-RES@northeastern.edu</a>	<a href="#">Subaward Tracker</a>	<a href="#">Subaward Team</a>

# *Tools/systems used at Northeastern in the lifecycle of an award*

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## *Online Resources*

System	Description	How to Request Access	Link for Access	Contact for Support
NU-RES Website	Information related to the lifecycle of an award	Open Access	<a href="#">NU-RES</a>	<a href="#">NU-RES Help Center</a>

System	Description	How to Request Access	Link for Access	Contact for Support
Research Website	Main landing page for research at Northeastern	Open Access	<a href="#">Research</a>	<a href="#">NU-RES Help Center</a>



# Tools/systems used at Northeastern in the lifecycle of an award

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## Online Resources

System	Description	How to Request Access	Link for Access	Contact for Support
Teams	The digital hub that brings conversations, content, and apps together in one place. It's available to Northeastern faculty, staff, and students as part of their Office 365 license.	Open Access	<a href="#">Research Administrators @NU</a>	<a href="#">NU-RES Help Center</a>
System	Description	How to Request Access	Link for Access	Contact for Support
Banner Help pages	"FOAP", Account Code, search pages	Open Access	<a href="#">Banner Web</a>	<a href="#">Research Finance</a>

# *Tools/systems used at Northeastern in the lifecycle of an award*

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## *Portfolio Management*

System	Description	How to Request Access	Link for Access	Contact for Support
Priority BA	Grant management system for portfolio management, provides visibility to award demographic information and financials	Submit paper application, multiple approval levels, College pays for license	<a href="#">Priority BA</a>	Priority "Contact Us" at Login or Supervisor

# Tools/systems used at Northeastern in the lifecycle of an award

## Reporting and Portfolio Management

System	Description	How to Request Access	Link for Access	Contact for Support
Cognos	Business Analytics systems that provides access to research reports; Provides access to research administration, research finance, and payroll reports	<a href="#">Cognos Access Request</a>	<a href="#">Cognos</a>	<a href="#">Data Administration Team (Mike Carlucci)</a>
System	Description	How to Request Access	Link for Access	Contact for Support
Banner ePrint	ePrint system stores financial reports on a server. The reports can be viewed on a web browser	<a href="#">Banner Access Request</a>	<a href="#">Banner ePrint</a>	Access: <a href="#">Procurement</a> Financials: <a href="#">Research Finance</a>

# Tools/systems used at Northeastern in the lifecycle of an award

## Expenditure processing - Payroll

System	Description	How to Request Access	Link for Access	Contact for Support
K2 - PDC	PDC (Payroll Distribution Change) - payroll allocations and changes	Open Access	<a href="#">K2 PDC webpage</a>	<a href="#">HR Knowledge Article &amp; Support</a>  Research Finance: <a href="#">Fred Crompt</a> , <a href="#">Fiorella Chavez</a>
System	Description	How to Request Access	Link for Access	Contact for Support
Workday - PAP	HR System: PAP (Period Activity Pay) - Summer Salary	Open Access <a href="#">Security Roles in Workday</a>	<a href="#">WorkDay</a>	<a href="#">HR Job Aid &amp; Support</a>

# ***Tools/systems used at Northeastern in the lifecycle of an award***

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## *Expenditure processing - Payroll*

<b>System</b>	<b>Description</b>	<b>How to Request Access</b>	<b>Link for Access</b>	<b>Contact for Support</b>
Salesforce	SGA payroll allocation (future payroll allocations, limited to 2 indexes)	Open Access	<a href="#">Salesforce</a>	PhD Network

## *Expenditure processing – Non-Payroll*

<b>System</b>	<b>Description</b>	<b>How to Request Access</b>	<b>Link for Access</b>	<b>Contact for Support</b>
K2 - Journal Vouchers	K2 workflow for Journal voucher/Cost transfer requests, routes to RFAs for approval	Open Access	<a href="#">K2 JV webpage</a>	<a href="#">Research Finance</a>

# Tools/systems used at Northeastern in the lifecycle of an award

## Expenditure processing – Non-Payroll

System	Description	How to Request Access	Link for Access	Contact for Support
K2 D-Pays	<p>K2 workflow for Vendor payments &lt; \$5k. Only use Vendor Payment Request if the goods or services are not available in myMarketplace, the cost is less than \$5,000, the vendor does not accept an AMEX (NUCard), and the vendor does not require a purchase order.</p> <p>You may also submit a Vendor Payment Request in lieu of a requisition if the supplier is on the university's Approved Suppliers List.</p>	Open Access	<a href="#">K2 D-Pays</a>	<a href="#">Research Finance</a>

# Tools/systems used at Northeastern in the lifecycle of an award

## Expenditure processing – Non-Payroll

System	Description	How to Request Access	Link for Access	Contact for Support
SSB (Self-Service Banner)	Purchase Order requisitions (for purchases greater than \$5,000)	<a href="#">Banner Access Request</a>	<a href="#">Banner SSB Page</a>	<a href="#">Research Finance</a>

System	Description	How to Request Access	Link for Access	Contact for Support
Concur	AMEX statement reconciliations and employee reimbursements. Use an AMEX card for purchases less than \$5,000.	Open Access	<a href="#">SAP Concur</a>	<a href="#">Research Finance</a> , <a href="#">Fred Crompt</a> , <a href="#">Stacey Cugini</a>

# Tools/systems used at Northeastern in the lifecycle of an award

## Expenditure processing – Non- Payroll

System	Description	How to Request Access	Link for Access	Contact for Support
Expense Reimbursement Vouchers	International D-Pays, reimbursements for non full-time employees and students.	Open Access	Submit request to <a href="mailto:Research_Finance@Northeastern.edu">Research_Finance@Northeastern.edu</a>	<a href="#">Research Finance</a>
System	Description	How to Request Access	Link for Access	Contact for Support
MyMarketplace	NU's preferred channel for purchasing goods or services is the online portal myMarketplace. It is a convenient, easy-to-use online shopping site that authorized faculty and staff can use to buy goods of any value.	<a href="#">myMarketplace Access Form</a>	<a href="#">MyMarketplace</a>	<a href="#">Procurement</a>



## *Tools/systems used at Northeastern in the lifecycle of an award*

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System	Description	How to Request Access	Link for Access	Contact for Support
K2 - DDP (Department Deposit Process)	K2 workflow developed to help process checks for deposit that are received by Colleges/Departments. Deposit requests route to Research or Treasury depending on the cost center. Workflow cannot be used for SFS (Student Financial Services) or Advancement deposits.	Open Access	<a href="#">K2 DDP page</a>	Research Accounting: <a href="#">Lindsay Goldstein</a>

# PRIORITY BA

Link: [Priority](#)



Northeastern  
University

# Priority BA System Access Request Form

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- See application process steps
- Note the prerequisites before applying
- Review and understand data confidentiality
- Complete the form
- Submit

## *Priority BA System Access Request Form*

### **Application Process Steps**

1. Requestor downloads Priority BA Access Request form
2. Requestor completes and signs form
3. Requestor sends form to Supervisor for review & approval
4. Supervisor reviews & signs form
5. Supervisor sends signed form to the Office of the Provost (attention: Matt Tobin <m.tobin@northeastern.edu>)
6. Office of the Provost reviews request
7. Office of the Provost approves, signs and sends to the Research Administration and Finance (attention: Alex Tran <a.tran@northeastern.edu>)
8. Research Administration and Finance Office reviews request
9. Research Administration and Finance Office approves, signs and sends to the Office of Finance, Planning, Strategy and Analytics (FPS&A) (attention: Jonathan Singer <j.singer@northeastern.edu>, Anna Rodier <a.rodier@northeastern.edu>)
10. Office of FPS&A grants access to Priority BA
11. Office of FPS&A notified Requestor & Supervisor of completion

### **Prerequisites**

1. Requestor must have an NUID
2. Requestor must have a valid Northeastern University faculty/staff or sponsored account
3. Requestor must have valid Northeastern University email address

# Priority BA System Access Request Form

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- See application process steps
- Note the prerequisites before applying
- Review and understand data confidentiality
- Complete the form
- Submit

## Important Notices

### NOTICE OF CONFIDENTIALITY AND APPROPRIATE USE POLICY

In being granted access, you verify that you have reviewed, understand and agree to the terms of the Appropriate Use Policy ([www.northeastern.edu/policies](http://www.northeastern.edu/policies)). Further, you agree to; access, use, distribute and share data only as needed to conduct University business as specified in your position/engagement description, to respect the confidentiality and privacy of individuals whose records or data you access, to observe all ethical and legal restrictions that may apply to data you view or handle (including Pii data), to protect your password(s), to report knowledge of security breaches or information security policy violations to Information Security and to comply with all department and University policies and procedures ([www.northeastern.edu/policies](http://www.northeastern.edu/policies)).

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### NOTICE OF REQUIREMENT TO MAINTAIN CONFIDENTIALITY

All individuals engaged by the University are required to keep all Northeastern University Information strictly confidential. No use or disclosure of any kind are permitted, except only as may be authorized under the terms/ scope of employment, engagement, and/or as may be explicitly authorized in writing by an officer of the University. To prevent unauthorized access to confidential information, you must log out of all applications and electronic files containing confidential information and secure any confidential printed materials before leaving your work area or general access area.

### NOTICE OF ACCOUNTHOLDER and MANAGER RESPONSIBILITY

Accountholders are responsible for all transactions conducted under their user ID. Managers are responsible to notify HRM Management and DBS Security when an individual whom they have approved for access is transferred or terminated from their department.

# Priority BA System Access Request Form

- See application process steps
- Note the prerequisites before applying
- Review and understand data confidentiality
- Complete the form
- Submit

## Part 1: Requestor Information

NUID: 00#####	NEU Email: x.xxxxxx@northeastern.edu	Telephone: (###) ### -####			
First Name:	Last Name:				
Title:	Department:	Mail Stop:			
University Role:	<input type="checkbox"/> Faculty	<input type="checkbox"/> Primary Investigator	<input type="checkbox"/> Staff	<input type="checkbox"/> Student	<input type="checkbox"/> Other

## Part 2: Request Information

Request Date:	mm/dd/yyyy		
Request Type:	<input type="checkbox"/> Report Viewer	<input type="checkbox"/> Report Author	<input type="checkbox"/> Other
I agree to all terms and conditions listed above under Important Notices:			
Requestor Signature:		Date:	mm/dd/yyyy

Northeastern University Confidential

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## Part 3: Supervisor Information & Approval

NEU Email:	x.xxxxxx@northeastern.edu	Mail Stop:	
First Name:	Last Name:	Telephone: (###) ### -####	
<b>Manager Agreement:</b> I approve this request for system access in accordance with University Policy. For the requestor named above, I approve the granting or continuance of the Priority BA access level listed. I certify this access is required to allow the named accountholder to perform assigned work-related duties.			
Manager Signature:		Date:	mm/dd/yyyy



# Priority BA System - Dashboard

01:17 PM | Welcome, Jeffrey Bonda (Change) | Sign Out

Accounting Personnel Publications Sponsored Projects Configuration User

Area: NEU

Dashboard Index / Funds Activity Codes Burn Rate Data Import Reconcile Batch Reporting Recon Status Index / Fund Investigator Trx Quick Find

### PA Dashboard

Version 4.6.0.12633

FAULT\* | New Dashboard

#### Salaries by Category

Designated	2,632
Grant	5
Plant	208
Research Grants	3,898
Restricted	715

#### Salaries-Exempt (1296)

#### Balances by Type

Type	Uncommitted Balance
Designated	
Plant	
Research Grants	
Restricted	

#### Balances by Organization

Organization	Uncommitted Balance
Bioengineering	
CCIS	
Electrical and Computer Engineering	
Engineering Office Of the Dean	
Mechanical + Industrial Engineering	

Actions: CTRL + SHIFT + Z

Page

Reports: Please select from list...

Application

Favorites:

- DFR Report
- CSSH DFR - Financial State...
- Burn Rate Civ
- Burn Rate CivE
- Burn Rate Chem
- COE Burn Rate
- PI Effort
- HUB Ending <180 Days; >\$50k
- HUB Ending <30 Days; >\$7.5k
- HUB One Line Index/Fund Ba...
- HUB Index/Fund by Group
- HUB Sub Award Report
- HUB Part Support Report

# Priority BA System – Index/Fund Page

**Index / Fund Information - HHS**
**(NEU)**

[Edit](#)
**Uncommitted Balance**
**\$93,229.46**

**Year** All (Current)

**Account Type** Research Grants

**Long Name** HHS

**Alias**

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**Budget** 01-01-2021 to 12-30-2022

**Project Period** 01-01-2021 to 12-30-2022

**Status** Active

**Grant Number**

**IRC Schedule** 57.00%UG\_STD

**Organizational Unit** 123400-Bioengineering

**Division** DIV23-College of Engineering

**Default Obj Mapping** COE

**Fund**

**Notes**

● **Encumbrance**
● **Expenditure**
● **Prior Month**
● **Balance**

**Budget Expenditures**

**Enc. Remaining**

**Balance** **\$ 93,229.46**

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**# of Persons Paid** **6**

**Salaries** **\$ 109,750.23**

**Fringe** **\$ 13,384.21**

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**Most Recent Activity** **05-31-2022**

**# Expense Categories** **20**

**# of Vendors** **4**

**Getting Started**

Use the links below to complete setup.

**One-Time Configuration**

[Add Award / Budget](#)

[Add Expenses to Date \(Optional\)](#)

**Responsible Persons** [Edit](#)

Investigator

Local Accountant

Central Accountant

**Flags** [Edit](#)

**Documents** [Add](#)

# Priority BA System – Index/Fund Page

Financial Statement

For the Period Ending Thursday, June 30, 2022

Year All Options...

Index / Fund  
 Org Unit 123400  
 Investigator  
 Budget Period 01-01-2021 to 12-30-2022  
 Grant

IDC Schedule: 57.00%UG\_STD  
 IDC Rate: 57.0%

Notes:

## Fund Summary

Budget	Expenditure Current	Expenditures Cumulative	Encumbrance Remaining	Uncommitted Balance
\$ 374,678.00	\$ 0.00	\$ 281,448.54	\$ 0.00	\$ 93,229.46

Account Code	Account Code Classification Name	Budget	Expenditure Current	Expenditures Cumulative	Encumbrance Remaining	Uncommitted Balance
61013	Salary-Faculty OCR	\$ 22,500.00	\$ 0.00	\$ 27,502.65	\$ 0.00	(\$ 5,002.65)
61050	Salary-SGA/Grad Assistant	\$ 0.00	\$ 0.00	\$ 80,907.58	\$ 0.00	(\$ 80,907.58)
61055	Salary-Postdoc Rsrch Assoc	\$ 50,500.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 50,500.00
61430	Salary-Addtl Help-Student	\$ 0.00	\$ 0.00	\$ 1,340.00	\$ 0.00	(\$ 1,340.00)
62113	Fringe Benefits	\$ 18,980.00	\$ 0.00	\$ 13,384.21	\$ 0.00	\$ 5,595.79
<b>Salary Total</b>		<b>\$ 91,980.00</b>	<b>\$ 0.00</b>	<b>\$ 123,134.44</b>	<b>\$ 0.00</b>	<b>(\$ 31,154.44)</b>
1	Travel	\$ 2,000.00	\$ 0.00	\$ 1,434.79	\$ 0.00	\$ 565.21
6	Other	\$ 2,000.00	\$ 0.00	\$ 19,745.78	\$ 0.00	(\$ 17,745.78)
7	Capital Equipment	\$ 19,000.00	\$ 0.00	\$ 27,561.06	\$ 0.00	(\$ 8,561.06)
9	Consultant/Contractor	\$ 110,187.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 110,187.00
16	Scientific Supplies	\$ 20,379.00	\$ 0.00	\$ 17,396.73	\$ 0.00	\$ 2,982.27
<b>Direct Expenses Total</b>		<b>\$ 153,566.00</b>	<b>\$ 0.00</b>	<b>\$ 66,138.36</b>	<b>\$ 0.00</b>	<b>\$ 87,427.64</b>
4	Indirect Costs	\$ 129,132.00	\$ 0.00	\$ 92,175.74	\$ 0.00	\$ 36,956.26
<b>Index / Fund Total</b>		<b>\$ 374,678.00</b>	<b>\$ 0.00</b>	<b>\$ 281,448.54</b>	<b>\$ 0.00</b>	<b>\$ 93,229.46</b>





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Questions?



**Thank You!**

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**LVX**

**VERITAS**

**VIRTUS**