Sponsored Research Proposals User Manual

Version 4.4
March 2014

FAMIS Services
The Texas A&M University System

INFORMATION IN THIS MANUAL IS ONLY CURRENT TO THE END OF FISCAL YEAR 2014

© 2014 The Texas A&M University System – All Rights Reserved

Introduction

The purpose of this manual is to assist in accessing and utilizing information in the Sponsored Research section of Financial Accounting Management Information System (FAMIS). FAMIS is an accounting system that responds to financial regulations applicable to educational institutions. All applications access a common database that allows different users to access identical information. Other applications include Financial Accounting, Accounts Payable, Accounts Receivable, Purchasing and Fixed Assets. Manuals for these applications are being developed or are currently available.

The materials are grouped according to Sponsored Research functions. All associated screens and processing information are included along with field descriptions. The required fields are designated by a diamond symbol (◆). Data entry information (**Help**) can be accessed on some screen fields with the use of the ***PF2*** key or typing an asterisk (*) or question mark (?) in the field.

By utilizing the information and guidelines contained in this manual, a user should be able to access sponsor information, create and modify sponsors, proposals, awards, and projects.

The FAMIS User Manuals are in a constant state of revision, due to screen updates, changes in procedures, or any one of a multitude of reasons. If you would like to make suggestions or call attention to errors, please contact us at (979) 458-6464, or copy the page with the error, note the correction or suggestion and send it to:

College Station based:	FAMIS Services The Texas A&M University System 1144 TAMU College Station, TX 77843-1144
Non-College Station based:	FAMIS Services The Texas A&M University System 301 Tarrow Street College Station, TX 77840-7896

Table of Contents

			PAGE
I	**Introduction**		
	001, M01, M02, M03, M10	Sponsored Research Menu Screens	I-7
		Basic Concepts	I-10
		Mission	I-10
		Research Policy	I-10
		General	I-10
		Types of Sponsored Agreements	I-11
		Preparation and Submission of Proposals and Agreements	I-14
		Sponsored Agreements Administered by TAMU Research Foundation	I-14
		Allowability and Documentation of Costs	I-14
		Treatment of Direct Costs and Facil./Admin. Costs	I-15
		Sponsored Research Proposal Terms	I-16
		Sponsor Search	I-16
		Sponsor Type	I-16
		Proposal Search	I-17
		Status	I-17
		Researcher Search	I-17
		Proposal Type	I-18
II	**Sponsor and Research Information**		
	Screen 4	Add/Modify Sponsor Information	II-3
	Screen 5	Enter Sponsor Contact Information	II-7
		Contact Search	II-7
		Contact Type	II-8
	Screen 7	Enter Sponsor Aliases	II-11
		Drop a Sponsor Alias	II-11
	Screen 8	Enter Sponsor Classification Levels	II-13
	Screen 9	Display Sponsors by Classification Levels	II-15
	Screen 192	Delete a Sponsor	II-17
	Screen 6	Add/Modify Researcher Information	II-19
III	**Proposal Maintenance**		
	Screen 821	Control Record Maintenance	III-3
	Screen 11	Add/Modify Proposal Information	III-4
	Screen 12	Proposal General Information	III-8
	Screen 13	Enter Proposal Researcher Information	III-11
	Screen 14	Enter Proposal Direct/Indirect Costs	III-14
	Screen 801	Indirect Cost Base	III-15
	Screen 15	Enter Proposal Codes, Keywords, and Roll-Up Groups	III-18
	Screen 16	Enter Proposal Compliance Codes	III-20
	Screen 17	Enter Proposal Comments	III-22
	Screen 18	Display Proposal Contact Information	III-24

			PAGE
	Screen 19	Enter Proposal Contact Information	III-26
		Add New Proposal Contacts	III-26
		Modify Existing Proposal Contacts	III-26
	Screen 20	Display Proposal Status Logs	III-29
		Add/Modify Comments	III-29
		Proposal Status	III-30
	Screen 21	Add/Modify Proposal Cost Sharing Data	III-31
	Screen 22	Display Proposal Routing Actions	III-33
		List of Proposal Actions Tracked by FAMIS	III-33
	Screen 90	Delete a Proposal	III-36
IV	**Proposal Inquiry**		
	Screen 30	Display Proposals for a Sponsor	IV-3
	Screen 31	Browse Proposals with a Researcher by Sponsor	IV-5
	Screen 32	Display Proposals for a Researcher	IV-7
	Screen 33	Browse Proposals by RFP Number	IV-9
	Screen 34	Browse Proposals by Keyword	IV-11
	Screen 35	Browse Proposals by System Member	IV-13
	Screen 36	Browse Proposals by Prior System Number	IV-15
	Screen 37	Browse Proposals by Sponsor and Submit Date	IV-17
	Screen 38	Browse Proposals by Submit Date	IV-19
	Screen 39	Browse Proposals by Status	IV-21
	Screen 40	Browse Proposals by Sponsor and Program	IV-24
	Screen 41	Browse Proposals by Program	IV-27
	Screen 42	Browse Proposals by Compliance Code Type	IV-30
	Screen 50	Display Linked Awards for a Proposal	IV-33
	Screen 51	Display Proposal Versions	IV-35
	Screen 52	Locate Proposals from Original Version	IV-37
	Screen 70	Print Proposals	IV-39
		Printing Process	IV-39
V	**Project Proposal Transfers**		
	Screen 101	Create Projects/Awards from a Proposal	V-3
	Screen 102	Create Awards from a Proposal	V-6
	Screen 103	Create Proposals from Projects/Awards	V-8
VI	**Appendix**		
		Instructions	VI-3
		Standard PF Keys	VI-9
		Glossary	VI-13

SPR Proposal Menus

The following menu screens display the screens used in the Sponsored Research Proposal Module of FAMIS.

001 – SPR Main Menu Screen

```
   001 SPR Main Menu Screen                                    11/04/13 13:43
                                                                FY 2014 CC 02
   Screen: ___


    M01  Sponsor and Researcher Menu          S01  SPR System Table Menu
    M02  Proposal Maintenance Menu            S02  Batch Submission Menu
    M03  Proposal Inquiry Menu

    M06  Entire Connection Download/Print

    M10  Project / Proposal Transfer Menu     AFR  Annual Financial Reporting
    M11  Project Maintenance  Menu            FFX  Fixed Assets Module
    M12  Project Inquiry Menu                 FRS  Financial Records System
    M13  Cost Sharing Menu                    GCP  General Construction Projects




Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next  Pers  SOR
```

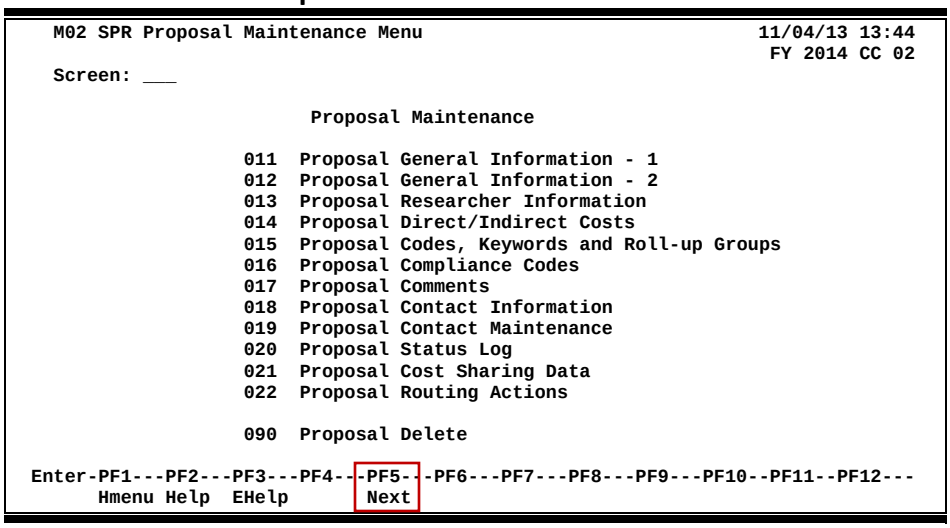
Menu M01 is used to list all of the sponsor and research screens available in the SPR module of FAMIS.

Menu M01 – SPR Sponsor and Researcher Menu

```
   M01 SPR Sponsor and Researcher Menu                         11/04/13 13:43
                                                                FY 2014 CC 02
   Screen: ___

                          Sponsor Screens

                    004  Sponsor Maintenance
                    005  Sponsor Contact Maintenance
                    007  Sponsor Alias Maintenance
                    008  Sponsor Levels Maintenance

                    009  Sponsor Levels Inquiry

                    192  Sponsor Delete

                          Researcher Screens

                    006  Researcher Maintenance


Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

Menu M02 lists all proposal maintenance screens. Screen 821 may be used to define which screens must be accessed for proper proposal maintenance within a specific TAMUS part. For example, Screens 11 through 17, Screen 19, Screen 21, and Screen 22 are required as part of the proposal maintenance process. Screen 18, Screen 20, and Screen 90 are not required as part of this process.

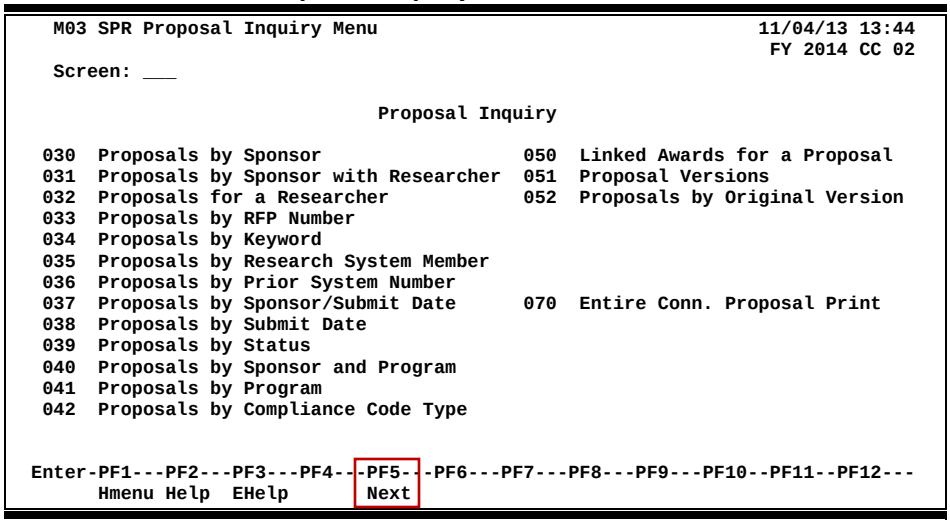
Menu M02 – SPR Proposal Maintenance Menu



```
M02 SPR Proposal Maintenance Menu                              11/04/13 13:44
                                                                FY 2014 CC 02
Screen: ___

                        Proposal Maintenance

                  011  Proposal General Information - 1
                  012  Proposal General Information - 2
                  013  Proposal Researcher Information
                  014  Proposal Direct/Indirect Costs
                  015  Proposal Codes, Keywords and Roll-up Groups
                  016  Proposal Compliance Codes
                  017  Proposal Comments
                  018  Proposal Contact Information
                  019  Proposal Contact Maintenance
                  020  Proposal Status Log
                  021  Proposal Cost Sharing Data
                  022  Proposal Routing Actions

                  090  Proposal Delete

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

Menu M03 in the SPR module is the Proposal Inquiry Menu Screen. This displays the screens available for viewing proposals by specific criteria.

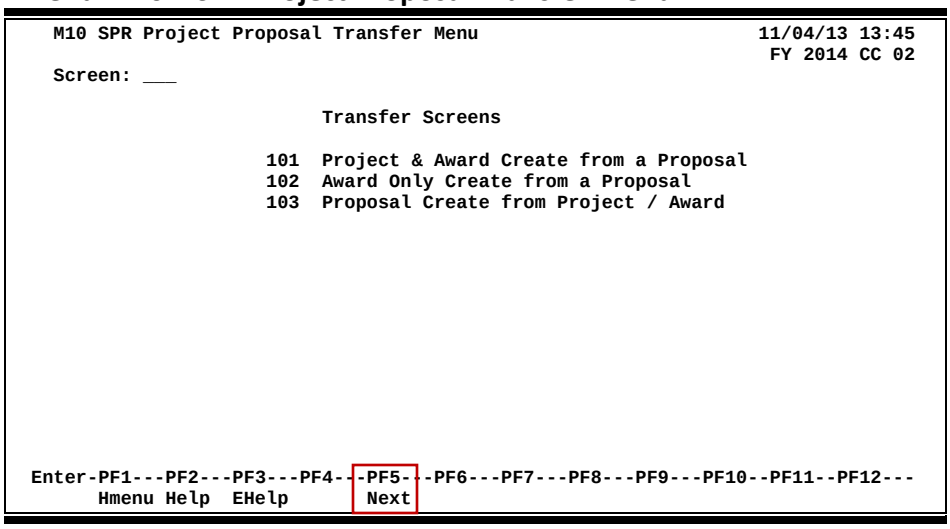
Menu M03 – SPR Proposal Inquiry Menu



```
M03 SPR Proposal Inquiry Menu                                  11/04/13 13:44
                                                                FY 2014 CC 02
Screen: ___

                              Proposal Inquiry

030  Proposals by Sponsor                   050  Linked Awards for a Proposal
031  Proposals by Sponsor with Researcher   051  Proposal Versions
032  Proposals for a Researcher             052  Proposals by Original Version
033  Proposals by RFP Number
034  Proposals by Keyword
035  Proposals by Research System Member
036  Proposals by Prior System Number
037  Proposals by Sponsor/Submit Date       070  Entire Conn. Proposal Print
038  Proposals by Submit Date
039  Proposals by Status
040  Proposals by Sponsor and Program
041  Proposals by Program
042  Proposals by Compliance Code Type


Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

Menu M10, the Project Proposal Transfer Menu, lists the available project/proposal transfer screens to use the SPR application functions.

Menu M10 – SPR Project Proposal Transfer Menu



SPR Proposals Basic Concepts

Conduction research is an important part of the mission and core values of The Texas A&M University System. The Sponsored Research Module in FAMIS is designed to assist with the tracking and reporting of sponsored projects. The Proposal section handles the initiation of proposals, while the Projects section holds the data related to awarded projects.

The following includes some annotated excerpts from The Texas A&M University System's Policy and Procedures Manual which outline the basic concepts in conduction research activities. (Please see the policy in its entirety at http://www.tamus.edu/offices/policy/.)

Mission

The Texas A&M University System was established to provide educational opportunity and service to Texas through its universities, state agencies, and health science center (HSC). We strive for the highest quality undergraduate, graduate, and professional educational programs; outreach and community enhancement services that meet the needs of individuals and organizations, and **research and knowledge generation** that meet our creative needs and provides the foundation for economic development in Texas.

Research Policy

The Chancellor shall approve procedures submitted by the CEO of each component for the implementation of research projects funded from Federal, State, commercial, gift, or specific donated funds.

Initiation of Agreements

It shall be the policy of the System to cooperate whenever possible, within the limits of its means and responsibilities, with individuals, government agencies, corporations or other outside parties in the solution of problems of mutual interest. The initiative for effecting such cooperative arrangements, including the establishment of grants-in-aid for the support of **research work**, may be assumed either by a component of the System or by an outside party.

General

In accepting **sponsored agreements**, System components are obligated to fulfill the purposes, and to meet the requirements, of the sponsored agreement. Expenditures of funds or use of resources provided by the sponsor or cost shared by the System component are governed by the sponsored agreement and System policies and regulations.

Types of Sponsored Agreements

Sponsored agreements are projects and activities that are supported (in whole or in part) with funds, materials, or other resources provided by sources outside the A&M System. Sponsored agreements are included in the major functions of an institution as defined below:

1. **Instruction**
   The teaching and training activities of an institution whether offered on a credit or noncredit basis, and whether offered through regular academic departments or separate divisions, such as a summer school division or an extension division. This term does not include the training of individuals in research techniques (commonly referred to as research training) as described in 2.1(2)(a) Sponsored research.

2. **Organized Research**
   All research and development activities of an institution which are separately budgeted and accounted for. It includes the following:

   a. ***Sponsored Research***
      All research and development activities that are externally sponsored by federal and non-federal agencies and organizations. This term includes activities involving the training of individuals in research techniques (commonly called research training) where such activities utilize the same facilities as other research and development activities and where such activities are not included in the instruction function.

   b. ***University Research***
      All research and development activities that are separately budgeted and accounted for by the institution under an internal application of institutional funds.

3. **Other Sponsored Activities**
   Sponsored programs and projects which involve the performance of work other than instruction and organized research. Examples are health service projects and community service programs.

Sponsored Agreements Definitions

1. **Contracts**
   An award by a sponsor to procure goods or services (including research) needed by the sponsor. Contracts awarded by federal agencies are usually subject to the *Federal Acquisition Regulation*.

   a. Cost Reimbursement Contract
   A contract issued on the basis of an estimate of the cost of performing the work arrived at by negotiation between the sponsor and the contractor. The contract provides for payment to the contractor for costs actually incurred up to a ceiling amount equal to the total estimated cost stated in the contract. The contractor is normally excused from further performance after the contractor's costs reach the ceiling, unless the sponsor increases the ceiling.

   b. Cost-Plus-A-Fee Contract
   A cost-reimbursement contract under which the contractor is paid a fee in addition to costs incurred. The fee may be set as a fixed percentage of the total estimated cost (a cost-plus-fixed-fee contract), or it may vary depending upon specified parameters such as cost, performance or schedule incentives set at the time the contract is negotiated (a cost-plus-incentive-fee contract). Cost-plus-a-fee contracts are not normally used for sponsored agreements of the System.

   c. Fixed Price Contract
   A contract in which the contractor agrees to deliver or to perform the contract work within the period specified at a fixed price agreed upon in advance and payable regardless of the actual costs.

   d. Fixed Price Contract With Price Revision
   A fixed price contract that contains a provision for negotiating the price, sometimes either downward or upward within preset limits, after the work has been completed.

2. **Grants**
   An award of financial assistance to accomplish a public purpose. Grants may be in the form of cash or property. The cash or property is designated by the grantor to be used for a specific educational, research, or extension project or activity, thus serving a specific interest or objective of the grantor. Grants awarded by federal agencies are subject to Office of Management and Budget (OMB) Circular A-110 and regulations established by the awarding agencies.

   a. Project Grant
   The most common form of grant. It provides funding for a specific project or program with a defined scope of work. Most project grants are for organized research.

b. Consortium Grant

A grant made to one institution in support of a project in which the program is carried out through a cooperative arrangement between or among the grantee institution and one or more participating institutions.

c. Demonstration Grant

A grant, generally of limited duration, made to establish or demonstrate the feasibility of a theory or approach.

d. Formula Grant

A type of grant awarded on the basis of some formula for distribution prescribed by legislation or executive directive. Examples are formula grants to agricultural experiment stations.

e. Grant-In-Aid

Another name for a project grant or formula grant.

f. Step-Funded Grant

A project grant, usually for a period of three years, with the initial grant providing 100% of the funds for the first year, 2/3 of the funds for the second year and 1/3 for the third year. A year later, if the project is to be continued, the grant provides 1/3 of the funds for the second year, 1/3 for the third year and 1/3 for a fourth year.

3. Cooperative Agreement

An award of financial assistance, similar to a grant, except that "substantial involvement" is anticipated between the awarding agency and the recipient during performance of the project or activity. "Substantial involvement" means that the recipient can expect programmatic collaboration or participation from the awarding party in the management of the award. Cooperative agreements awarded by federal agencies are usually subject to the same administrative requirements as grants.

Preparation and Submission of Proposals and Agreements

Sponsored agreements will be conducted in accordance with the terms of a written agreement between the A&M System component involved and the sponsor. The agreement will include, but is not limited to, the following:

1. statement of work, including specific responsibility of each party;
2. name or position of faculty or staff member directly responsible for the program;
3. the amount, terms of payment, and type of costs for which the funds may be expended;
4. F&A cost considerations;
5. provisions for progress and final reports; and
6. ownership of research results, patents, equipment, publications, and copyrights. (See System Regulation 17.02.01.)

Sponsored Agreements Administered by the Texas A&M Research Foundation

The Texas A&M Research Foundation (Research Foundation) is an independent, nonprofit organization affiliated with and representing the System and its components in **sponsored arrangements** with research sponsors from industry, government, foundations, private business organizations, and other nonprofit organizations.

Allowability and Documentation of Costs on Federally Sponsored Agreements

Regardless of whether they are treated as direct costs or F&A costs, the allowability of costs on **sponsored agreements** with federal agencies is governed by the cost accounting principles prescribed by OMB Circular A-21, *Cost Principles for Educational Institutions*. These cost principles are also used in determining the cost of work performed by educational institutions under sub grants, cost-reimbursement subcontracts, and other awards under federally sponsored agreements. Further, OMB Circular A-21 cost principles are used as a guide in the pricing of fixed-price or lump sum contracts and sub-contracts performed by educational institutions where estimated costs are used in determining the appropriate price.

All costs charged to **sponsored agreements** must be adequately documented. Charges for salaries and wages must be documented by after-the-fact certifications (or individual time sheets for hourly staff and some student employees) of time or effort devoted to each sponsored agreement by each employee. The documentation of other costs, such as supplies and travel should be appropriate to the specific type of expense involved (e.g., invoices, airline and hotel receipts, etc.).

Consistent Treatment of Direct Costs and Facilities and Administrative Costs of Sponsored Agreements

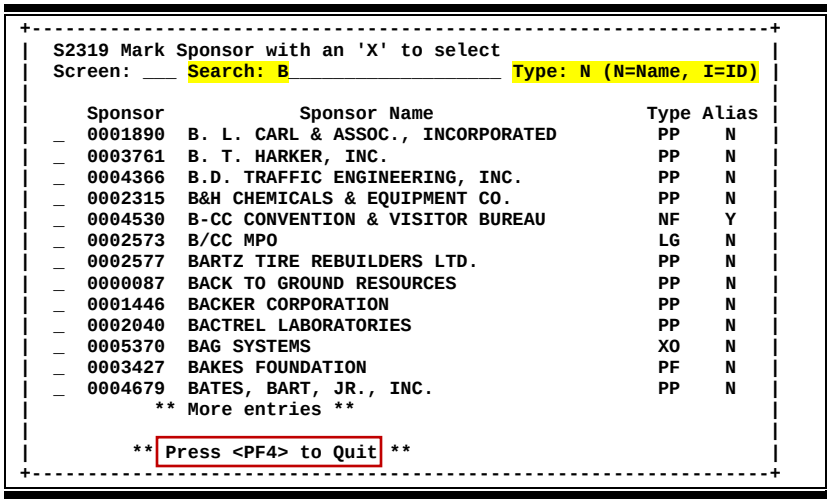
1. **Direct Costs**
   Those costs that can be identified specifically with a particular **sponsored project**, an instructional activity, or any other institutional activity or that can be directly assigned to such activity relatively easily with a high degree of accuracy. Examples of costs charged directly to a sponsored agreement are the compensation of employees for performance of work on the project, the costs of materials expended on the project, and other items of expense incurred for the project.

2. **F&A Costs**
   Those costs that are incurred for common or joint objectives and therefore cannot be identified readily and specifically with a particular sponsored project, an instructional activity or any other institutional activity. Examples of F&A costs, which were formerly referred to as indirect costs, are general administrative expenses, departmental administration, sponsored projects administration, equipment and building use allowances, and physical plant operation and maintenance. These costs represent a real expense to the institution in the performance of sponsored agreements.

Sponsor Search

If the sponsor identification number is not known, typing an asterisk (*) in the ***Sponsor*** field and pressing <ENTER> will access a pop-up window with a complete list of valid sponsors and their identification numbers. You may search for a sponsor name by entering a Type: of "N", or for a sponsor identification number by entering a Type of "I". Type an "X" next to the desired sponsor and press <ENTER> to select the sponsor and return to Screen 4. Press ***PF4*** if you wish to return to Screen 4 without selecting a sponsor.

Any screen with a ***Sponsor*** field may be used to search for a specific sponsor.



Sponsor Type

The sponsor type is used to indicate the type of sponsor funding a particular project. Typing a question mark (?) in the ***Sponsor Type*** field and pressing <ENTER> will access a pop-up window with a complete list of valid sponsor types. Type an "X" next to the desired type and press <ENTER> to select the sponsor type and return to Screen 4. Press ***PF4*** if you wish to return to Screen 4 without selecting a sponsor type. Sample sponsor types include:

VALUES	MEANING
F	FEDERAL
IN	INSTITUTIONAL (TAMUS SPONSORE)
LA	COUNTY AGENCIES
LD	DISTRICTS, AUTHORITIES, COMMI
LG	CITY GOVERNMENTS
NC	PRIVATE NON-PROF FED FUND RES
NF	PRIVATE NON-PROF FOUNDATION
NR	PRIVATE NON-PROF RESEARCH ORG

Proposal Search

If the proposal identification number is not known, typing an asterisk (*) in the ***Proposal*** field and pressing <ENTER> will access a pop-up window with a complete list of proposals and their identification numbers. You may search for a proposal title by entering a Type: of "N", or for a proposal identification number by entering a Type: of "I". Type an "X" next to the desired proposal and then press <ENTER> to select the proposal and return to Screen 11. Press ***PF4*** if you wish to return to Screen 11 without selecting a proposal.

Status

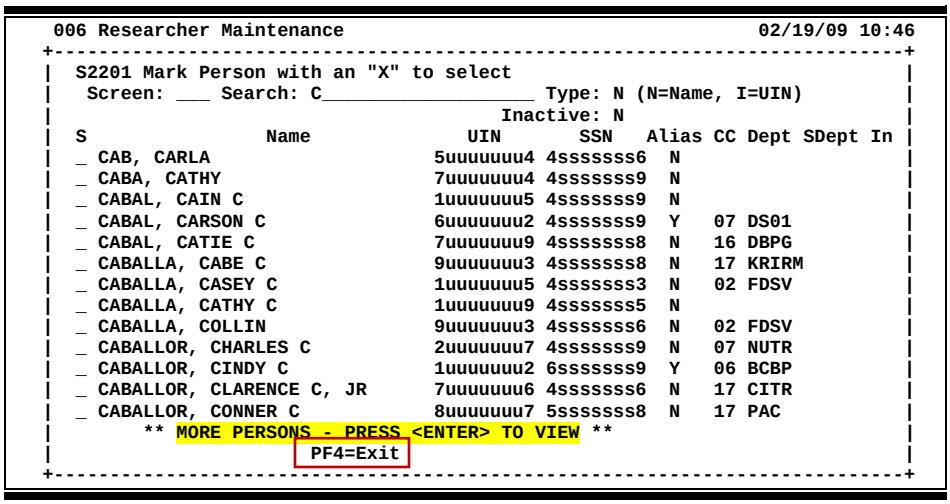
The ***Status*** field is used to indicate the status of the award for the proposal. Typing a question mark (?) in the ***Status*** field and pressing <ENTER> will access a pop-up window with a complete list of valid proposal status values. Type an "X" next to the desired status and press <ENTER> to select it and return to Screen 11. Press PF4 if you wish to return to Screen 11 without selecting a status. The default value is "E" (Pre-Submission). Other sample status values include:

Must be set to "A" or "F" to transfer to Project/Award.

VALUES	MEANING
A	AWARDED - PARTIALLY EXECUTED
C	CANCELLED - NOT SUBMITTED
E	PRE-SUBMISSION
F	AWARDED - FULLY EXECUTED
P	PENDING SPONSOR APPROVAL
R	REJECTED BY SPONSOR
V	REVISION SUBMITTED
W	WITHDRAWN FROM SPONSOR REVIEW

Researcher Search

If the researcher identification number is not known, typing an asterisk (*) in the ***Researcher*** field and pressing <ENTER> will access a pop-up window with a complete list of valid researchers and their identification numbers. You may search by researcher name by entering "N" in the ***Type*** field, or by researcher identification number by entering "I." Type an "X" next to the desired researcher and press <ENTER> to select the researcher and return to Screen 6. Press PF4 if you wish to return to Screen 6 without selecting a researcher.



Proposal Type

The ***Proposal Type*** field is used to group proposals by its method of submission. Typing a question mark (?) in the ***Proposal Type*** field and pressing <ENTER> will access a pop-up window with a complete list of valid proposal types. Type an "X" next to the desired type and press <ENTER> to select it and return to Screen 11. Press PF4 if you wish to return to Screen 11 without selecting a proposal type. Sample proposal type values include:

"New" if you have to complete.

VALUES	MEANING
C	CONTINUATION
E	EXTENSION
L	PRE-PROPOSAL
N	NEW SOLICITED
P	RFP
R	RESUBMISSION
S	SUPPLEMENTAL
T	TRANSFER
U	UNSOLICITED
W	RENEWAL
X	NON-PROPOSAL ITEM

Section II
Sponsor and Researcher Information

Add/Modify Sponsor Information

Inquiry and updates to FAMIS sponsor information are maintained on Screen 4. Sponsor numbers are created to identify those agencies and institutions that support research within the TAMU System. The 7-digit number, associated with each sponsor, is assigned by the user according to guidelines set by his/her System part.

A three-digit field for entering the Texas State Agency Code indicates that a sponsor is a Texas State Agency. (Examples: use "711" for TAMU and "710" for TAMUS.) For all other sponsors, the field is blank.

A Maestro identification number is required in the ***Maestro*** field. Use PF2 to select the sponsor's ID from the search screen; if none is available you will need to request a new Maestro sponsor number from someone authorized at your entity.

Request a New Maestro Sponsor Number

1. Download and complete the form: http://maestro.tamus.edu/tiki-download_wiki_attachment.php?attId=26&page=HomePage
2. Email the completed form to maestrosponsor@tamus.edu or FAX it to (979) 458-7619. TEES Research Services (TRS) will provide the Maestro Sponsor ID. This central maintenance is required to avoid duplicates and maintain standard names in Maestro.
3. Create the sponsor in FAMIS, entering the Maestro Sponsor ID received from TRS in the ***Maestro*** field on Screen 4.

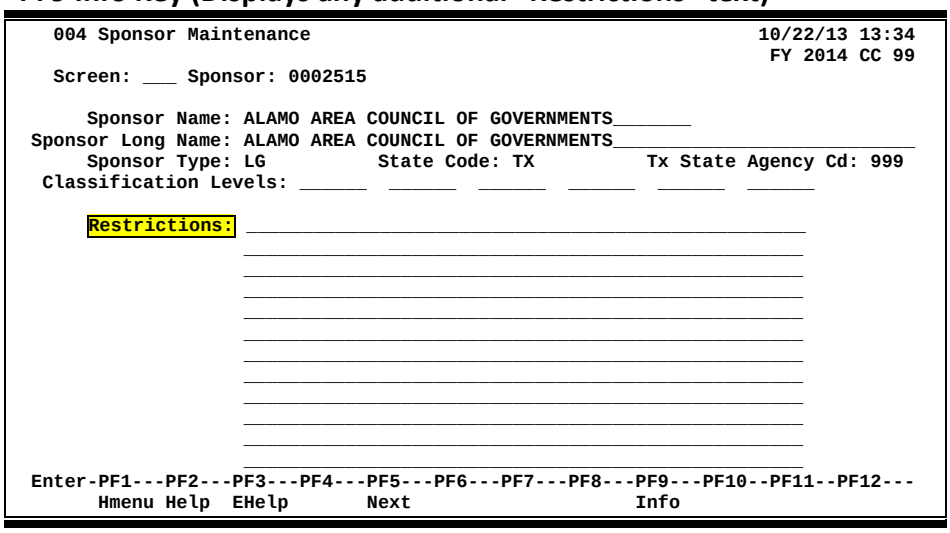
> The Sponsor Table (file) is a **shared file** among FAMIS users. The changes you make for a sponsor affect all TAMUS Parts using the SPR module.

Screen 4 – Sponsor Maintenance

```
  004 Sponsor Maintenance                                    10/22/13 13:34
                                                              FY 2014 CC 99
  Screen: ___ Sponsor: 0002515

     Sponsor Name: ALAMO AREA COUNCIL OF GOVERNMENTS_______
Sponsor Long Name: ALAMO AREA COUNCIL OF GOVERNMENTS_____________________________
     Sponsor Type: LG          State Code: TX          Tx State Agency Cd: 999
 Classification Levels: ______ ______ ______ ______ ______ ______
  Fiscal-Year-End: 00  Maestro: 2448_____ Alamo Area Council of Governments
     Restrictions: ____________________________________________________
                   ____________________________________________________
         Inactive: _ by:                          Added by: RABB99P  01/05/2006
                          * ----- Contacts ----- *
 Sel  Type      Name                      Title                 Phone     Ext.
  _     PP    CINDY KRUEGER             ADM. SERVICES DIRECT  210-362-5295


                                 **  End of list  **
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next                    Info
```

Press PF9 to add/modify/view additional restrictions text.

PF9 Info Key (Displays any additional "Restrictions" text)



Basic Steps

Add Sponsors

- Type a zero (0) in the ***Sponsor*** field and press <ENTER>.
- Type a Sponsor Name and Sponsor Type in the fields provided.
- Enter additional data, as desired.
- Press <ENTER> to record the sponsor information.

Modify Sponsors

- Type the sponsor's number in the ***Sponsor*** field or type an asterisk (*) to select the desired sponsor from the displayed list in the pop-up window and press <ENTER>.
- Make modifications as needed and press <ENTER> to record the information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Sponsor:** 7 digits * Help
Enter a FAMIS sponsor ID number.

Screen Information

◆ **Sponsor Name:** 40 characters PF2 Help
Identify short name or abbreviation of sponsor.

Sponsor Long Name: 60 characters PF2 Help
Type the full name of the sponsor giving awards for research. This should be the same as the previous field unless the sponsor name is too lengthy for the ***Sponsor Name*** field.

Sponsor Type: 2 characters **? Help**
Enter type of sponsor funding project.

State Code: 2 characters **? Help**
Identify the state mail code. Example: *Texas = TX.*

Tx State Agency Cd: 3 digits
Include the Texas State Agency Code for a sponsor that is a Texas State Agency. (Examples: 711 for TAMU and 710 for TAMUS.)

Classification Levels: 6 characters
Indicate hierarchical levels available to classify sponsors.

Fiscal-Year End: 2 digits **PF2 Help**
Enter last month of the fiscal year for sponsor.

◆ **Maestro:** 10 digits
Enter the identification code for the Maestro sponsor.
If none is available, you will need to follow the steps for creating a new Maestro sponsor.

Restrictions: 100 characters
Include any restrictions placed by the specified sponsor.

Inactive: 1 character
Type "Y" to inactivate the sponsor.

by: 6 characters/digits
Displays the FAMIS User ID of the person who inactivated the sponsor and the date this was done.

Added By: 6 characters/digits
Displays the FAMIS User ID of the person who added the sponsor's information and the date added.

Sel: 1 character
Type an "X" to select a contact and press <ENTER> to advance to Screen 5 where detailed proposal contact information can be entered/modified.

Type: 1 character
Shows the function type of the contact.

Name: 25 characters
Displays the full name of the contact.

Title: 20 characters
Indicates the title/function of the proposal contact.

Phone: 10 digits
Displays the area code and phone number of the proposal contact.

Ext: 4 digits
Identifies the phone extension number of the specified contact.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

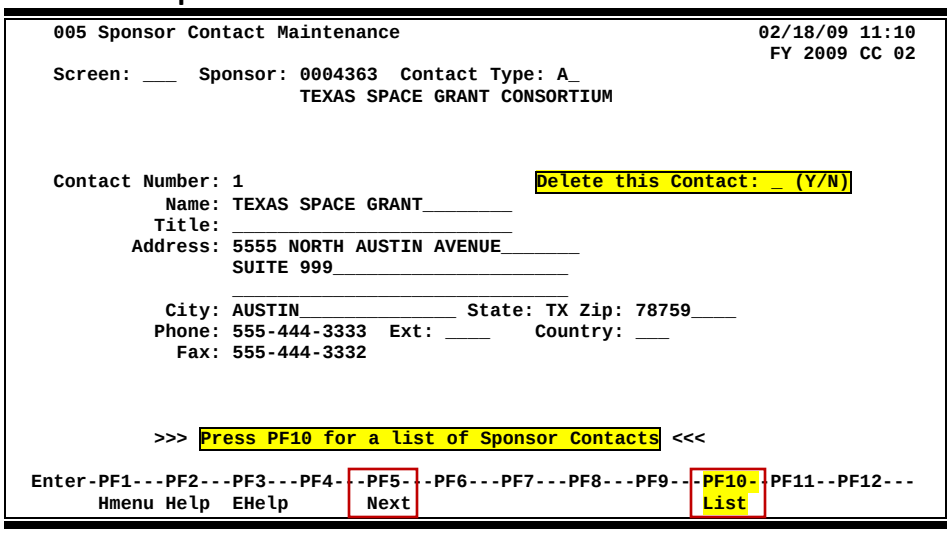
PF9 **Additional Restriction Information**
Info Used to add/modify additional sponsor restriction information. **This PF key can be used to toggle additional Restrictions information display on and off, if available.**

Enter Sponsor Contact Information

Sponsor contact information may be accessed and updated on Screen 5. The fields shown represent attribute information about the sponsor's contact person.

> Since the original sponsor is not contacted at this level, this screen isn't often used.

Screen 5 – Sponsor Contact Maintenance



Basic Steps

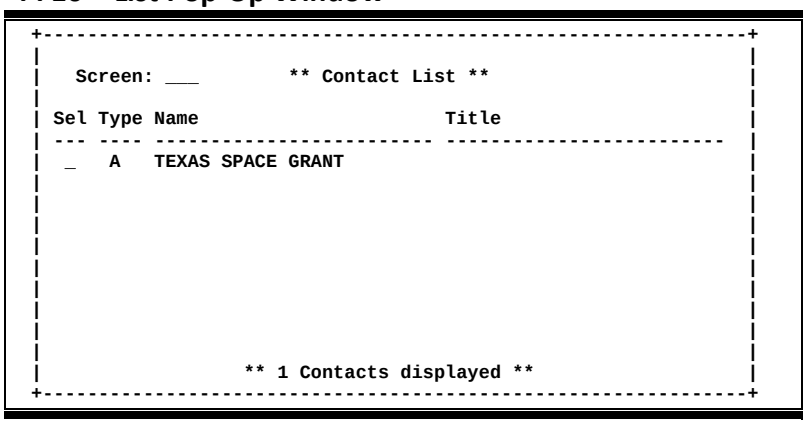
- Type a sponsor identification number and contact type in the fields available and press <ENTER>.
- Enter the name of the contact in the ***Name*** field.
- Enter additional data in the available fields, as desired.
- Press <ENTER> to record the sponsor contact information.

Contact Maintenance Process

Contact Search

Press PF10 to display a complete list of contacts for a specified sponsor. To select a contact, type an "X" in the ***Sel*** (Select) field and press <ENTER>. This will pass the contact name back to Screen 5, and display the contact's information. Press <ENTER> to return to Screen 5 without selecting a contact.

PF10 – List Pop-Up Window



Contact Type

The contact type is used to group sponsor contacts by function. Only one contact is allowed per contact type. For example, if there are two administrative position contacts, only one would be listed under contact type "A." The second contact should be "A2"; the next should be "A3," etc. The same process applies to all contact types.

Type a question mark (?) in the ***Contact Type*** field and press <ENTER> to access a pop-up window with a complete list of valid contact types. Type an "X" next to the desired type and press <ENTER> to select the contact type and return to Screen 5. Press PF4 to return to Screen 5 without selecting a contact type.

Contact types include:

M	VALUES	MEANING
	A	ADMINISTRATIVE
	A2	ADMINISTRATIVE - 2
	A3	ADMINISTRATIVE - 3
	BD	BUDGET
	BS	BUSINESS
	F	FINANCIAL
	IP	INTELLECTUAL PROPERTY
	P	PROPERTY/INVENTORY
	PG	PROGRAM
	PP	PROPOSAL
	S	SUBCONTRACT
	S2	SUBCONTRACT - 2
	S3	SUBCONTRACT - 3
	S4	SUBCONTRACT - 4
	T	TECHNICAL

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Sponsor:** 7 digits * Help
Enter a FAMIS sponsor identification number. The sponsor's name will be displayed.

◆ **Contact Type:** 2 characters/digits ? Help
Identify the function of the contact. Examples:

A	=	Administrative
A2	=	Administrative - 2
A3	=	Administrative - 3
BD	=	Budget
BS	=	Business
F	=	Financial

Screen Information

Contact Number: 3 digits
Type the system assigned number given to each contact.

Delete this Contact: 1 character
Type "Y" if the contact should be deleted from the sponsor information.

◆ **Name:** 25 characters
Identify the name of the contact person.

Title: 25 characters
Indicate the title/function of the sponsor contact.

Address: 3 lines/30 characters
Enter the street address of the contact where correspondence should be mailed.

City: 20 characters
Type the name of the city for the mailing address of the specified proposal contact.

State: 2 characters ? Help
Enter the state code for the mailing address of the specified proposal contact.

Zip: 9 digits
Include the Zip code for the mailing address of the specified proposal contact.

Phone: 10 digits
Identify the contact's area code and phone number.

Ext: 4 digits
Indicate the extension number for the specified contact.

Country: 3 characters **? Help**
Identify the country code of the specified proposal contact.

FAX: 10 digits
Indicate the area code and FAX number for the contact.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

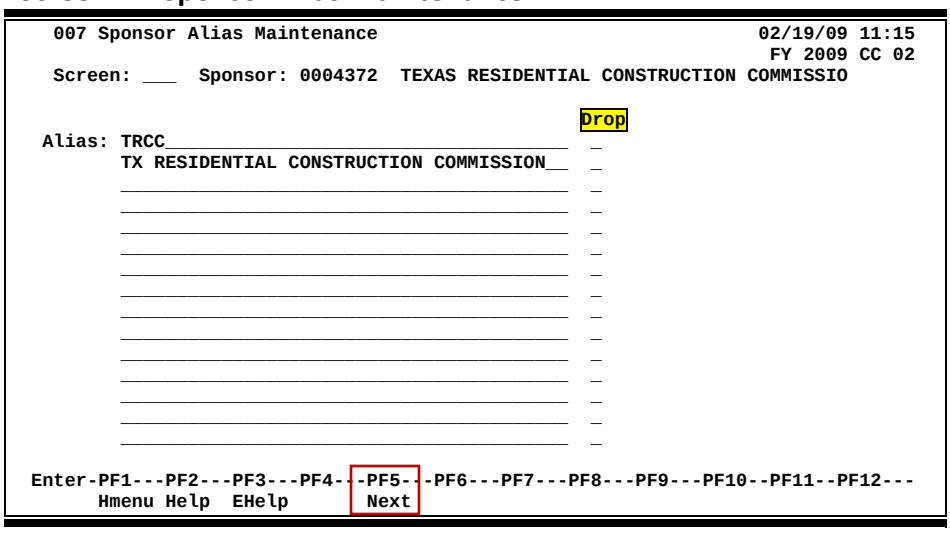
PF10 **Contact List**
List Displays a complete list of contacts for the sponsor. Type "X" to select a contact and press <ENTER> to return to Screen 5.

Enter Sponsor Aliases

An alias is another name for a sponsor, other than the current record name. Aliases can help locate the sponsor through a name search. Each TAMUS Part has designated users who have the authority to update the ***Alias*** field for a sponsor.

Each sponsor may have several aliases. Screen 7 is used to maintain aliases for a sponsor.

Screen 7 – Sponsor Alias Maintenance



Basic Steps

- Type a sponsor identification number in the ***Sponsor*** field and press <ENTER>. You may also type an asterisk (*) in this ***field*** and press <ENTER> to make a selection from the list displayed.
- Add or modify the information in the ***Alias*** field as needed and press <ENTER> to record the information.

Drop a Sponsor Alias

- Type "Y" in the ***Drop*** field to drop a sponsor alias. **No sponsor data is lost when an alias is dropped.**

When a sponsor is dropped (using Screen 192), FAMIS will automatically remove all aliases that have been created for the sponsor.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Sponsor:** 7 digits * Help
Enter a FAMIS sponsor identification number.

Screen Information

- **Alias:** 15 lines/40 characters
  Identify the alias name for the specified sponsor, other than the current record name.

Drop: 1 character
Enter "Y" if the sponsor alias should be dropped from the system.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

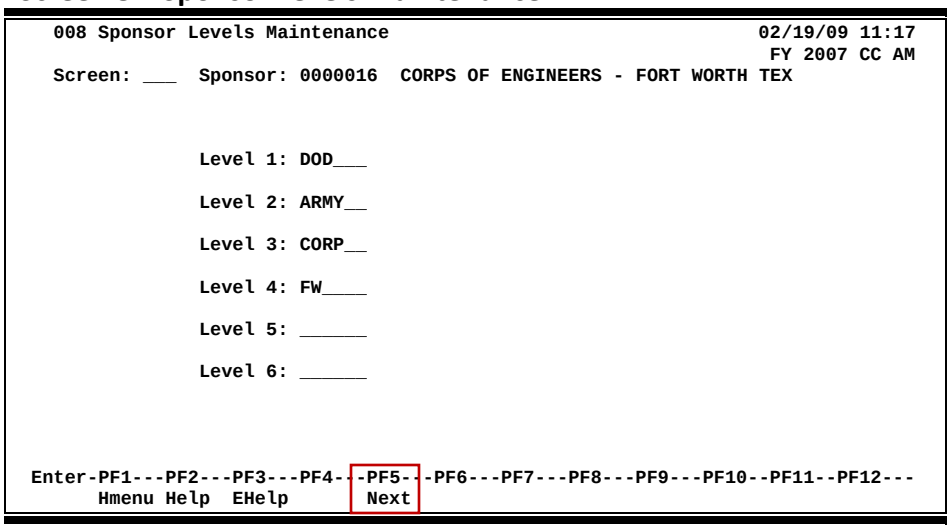
Enter Sponsor Classification Levels

Entry and update of sponsor classification levels is accomplished through Screen 8. This is used primarily for federal sponsors to provide a hierarchical classification. Information entered on this screen may be viewed using Screen 4 or Screen 9.

For example, the "Fort Worth Division of the Army Corps of Engineers" could be identified by the following hierarchy:

Level 1 - DOC
Level 2 - Army
Level 3 - Corp
Level 4 - FW

Screen 8 – Sponsor Levels Maintenance



Basic Steps

- Type a sponsor identification number in the ***Sponsor*** field and press <ENTER>. You may also type an asterisk (*) in this field and press <ENTER> to make a selection from the list displayed.
- Include up to 6 levels of organization for the sponsor and press <ENTER> to record the information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Sponsor:** 7 digits * Help
Enter a FAMIS sponsor identification number.

Screen Information

Level 1, 2, 3, 4, 5, 6: 6 characters
Include the user-defined hierarchical classification levels of the sponsor.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

Display Sponsors by Classification Levels

You may display all sponsors for a level or combination of levels and sponsor types using Screen 9. To view all levels for a sponsor type, leave the ***Levels*** fields blank.

Screen 9 – Sponsor Levels Inquiry

```
009 Sponsor Levels Inquiry                                  12/10/13 08:41
                                                             FY 2014 CC 02

Screen: ___  Sponsor Type: F_
                  Levels: ______  ______  ______  ______  ______  ______

  ID         Sponsor Name           ----------------- Levels ----------------
0000237  DEPARTMENT OF HEALTH AND   DHHS
0006828  DHHS-OFFICE OF THE ASSIST  DHHS
0007085  DHHS-AGENCY FOR HEALTH CA  DHHS   AHCPR
0002959  DHHS-NATIONAL INSTITUTES   DHHS   NIH
0006795  DHHS-NIH-NATIONAL HUMAN G  DHHS   NIH    NHGRI
0000613  NATIONAL INST. OF GENERAL  DHHS   PHS
0000240  DOC                        DOC
0006882  DOC-NOAA-NMFS-WASHINGTON   DOC    NOAA   NMFS   WASHIN
0001110  DOD-ARL-ARO                DOD
0001733  DOD-DNA                    DOD
0001138  DEPARTMENT OF DEFENSE-UNI  DOD    ARMY
0002000  DOD-DEFENSE THREAT REDUCT  DOD    DTRA
0001412  USAE WATERWAYS             DOD    USAE
0006606  BROOKHAVEN SCIENCE ASSOCI  DOE
            **** Press Enter to View more Sponsors ****
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

Basic Steps

- Type a sponsor type in the ***Sponsor Type*** field and press <ENTER> to display a list of sponsors and their assigned levels.
- Enter valid text in the ***Levels*** fields and press <ENTER> to display a list of sponsors that have been assigned the specified level information.

Sponsor Levels Inquiry Process

Positioning the Display

The sponsor levels listing may be positioned by entering one or more valid levels in the ***Levels*** fields. Enter the desired levels to view a list of sponsors that have been assigned to the specified levels, or leave blank to view all sponsors for the sponsor type entered in the ***Sponsor Type*** field.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Sponsor Type:** 2 characters * Help
Identify the type of sponsor funding the project.

Levels: 6 characters
Indicate the desired hierarchical classification levels.

Screen Information

ID: 7 digits
Shows the FAMIS sponsor identification number.

Sponsor Name: 25 characters
Indicates the name of the sponsor.

Levels: 6 characters
Identifies the user-defined hierarchical classification levels of the sponsor.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

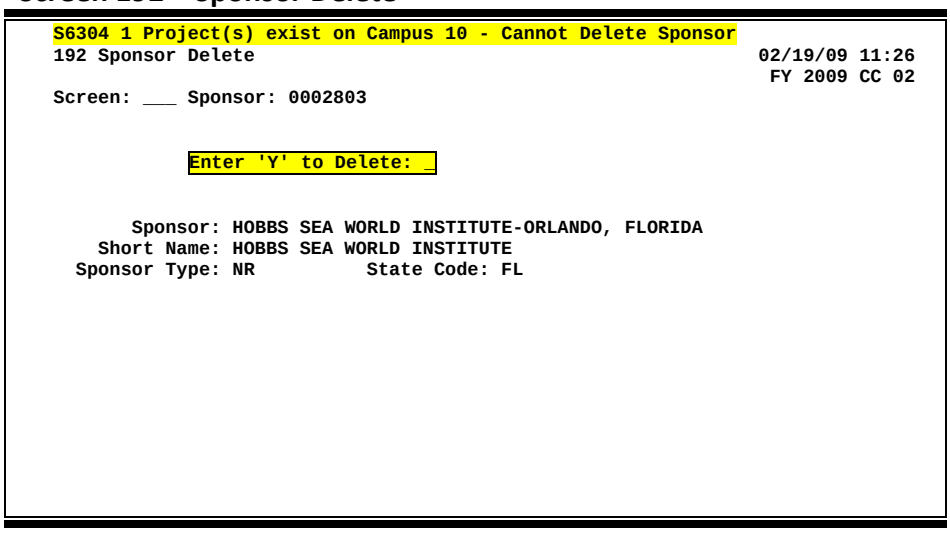
PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

Delete a Sponsor

Sponsors may be deleted from the system using Screen 192. If there are existing projects associated with the sponsor, a message will appear at the top of the screen.

Sponsors may only be deleted if they do not have any existing projects associated with them.

Screen 192 – Sponsor Delete



Basic Steps

- Type a sponsor number in the ***Sponsor*** field and press <ENTER> to display existing sponsor information. You may also type an asterisk (*) in this field and press <ENTER> to make a selection for the sponsors displayed.
- If there are no existing projects associated with the sponsor, you may type "Y" in the ***Delete*** field and press <ENTER> to remove the sponsor from the system.
- Type "Y" in the pop-up window to confirm deletion of the specified sponsor.

Sponsor Deletion Process

Delete a Sponsor

If there are no existing projects associated with the specified sponsor, you may type "Y" in the ***Delete*** field to initiate removal of the sponsor from the system. Type a "Y" in the confirmation window to delete the specified sponsor.

Deletion Confirmation Pop-Up Window

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Sponsor:** 7 digits *** Help**
Enter the desired sponsor identification number.

◆ **Enter 'Y' to Delete:** 1 character
Type "Y" to mark the sponsor for deletion.

Screen Information

Sponsor: 40 characters **PF2 Help**
Indicates the full name of the sponsor to be deleted.

Short Name: 40 characters **PF2 Help**
Displays a short name or abbreviation of the sponsor to be deleted.

Sponsor Type: 2 characters
Indicates the type of sponsor to be deleted.

State Code: 2 characters
Identifies the state mail code.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

Add/Modify Researcher Information

Screen 6 allows you to add or modify information for a researcher. The researcher's Universal Identification Number (UIN) is used for the researcher identification number.

The person file for the researcher must be set up on Screen 850 in the FRS module before data will be displayed on this screen in the SPR module.

Screen 6 – Researcher Maintenance

```
   006 Researcher Maintenance                                    02/19/09 13:35
                                                                  FY 2009 CC 02
   Screen: ___  Researcher: 4uuuuuuu8 YANNIPO, YURI Y

          PI/Researcher: _
  Date Doctoral Received: __________        Member Graduate Council: _
         Assistant Name: ____________________      Assistant Phone: ____________
      Areas of Interest: _____  _____  _____  _____  _____
                         _____  _____  _____  _____  _____
   Special Instructions: ____________________________________________
                         ____________________________________________
                         ____________________________________________

        UIN: 4uu-uu-uuu8     Address: 444 BIO/BIO
     Gender: M                      2111 TAMU
  Dept/SDept: BCBP
  Date Hired: 10/01/99          City: COLLEGE STATION  St: TX  Zip: 77843
  Title Code: 7200             Phone: 979-455-5555            FAX: 979-445-4444
Adloc Part: 02            Mail Code: C2128
        Acct: 130005
      Suffix:          E-Mail: YYY@TAMU.EDU
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp       Next
```

Basic Steps

- Type a researcher identification number in the ***Researcher*** field. If the number is not known, you may type an asterisk (*) in this field to view a list of researchers, or type part or all of the researcher's last name to view matching researchers.
- Press <ENTER> to display existing researcher information.
- Type additional information or make modifications, as desired, and press <ENTER> to record the researcher information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Researcher:** 9 digits * Help
Enter a FAMIS researcher's UIN number.

Screen Information

PI/Researcher: 1 character
Type "Y" in this field if the person is a PI/Researcher.

Date Doctoral Received: 8 digits
Enter the date the researcher received his/her doctoral degree.

Member Graduate Council: 1 character **PF2 Help**
Enter "Y" if the researcher is a member of the graduate council.

Assistant Name: 20 characters **PF2 Help**
Identify the name of the researcher's assistant, if any.

Assistant Phone: 10 digits
Provide the phone number of the researcher's assistant, if applicable.

Areas of Interest: 10 fields, 5 characters each
Include any of the researcher's interests/specialties. Note: this is not currently defined for the system.

Special Instructions: 3 lines, 40 characters each **PF2 Help**
Indicate any special instructions/items of interest for the selected researcher.

UIN: 9 digits
Displays the researcher's Universal Identification Number.

Address: 90 characters/digits
Provides the street address of the selected researcher, as entered on Screen 850.

Gender: 1 character
Indicates whether the specified researcher is a male (M) or female (F).

Dept/SDept: 5 characters
Identifies the department and subdepartment where the researcher is employed.

Date Hired: 6 digits
Indicates the hire date for the specified researcher.

City: 15 characters
Shows the city in which the researcher resides.

St: 2 characters **PF2 Help**
Indicates the state in which the researcher resides.

Zip: 9 digits
Identifies the Zip code for the researcher's mailing address.

Title Code: 4 digits **PF2 Help**
Identifies the position title code for the researcher within the TAMUS system.

Phone: 10 digits
Provides the researcher's phone number.

FAX: 10 digits
Shows the researcher's FAX number.

Adloc Part: 2 digits **PF2 Help**
Displays the TAMUS address location as defined by BPP.

Mail Code: 5 digits **PF2 Help**
Identifies the researcher's campus mail stop code.

Acct: 6 digits
Shows the account number, as defined by BPP.

Suffix: 1 character
Displays the suffix assigned to the adloc account, as defined by BPP.

E-Mail: 30 characters/digits
Identifies the researcher's email address, if available.

Additional Functions

PF KEYS See Appendix for explanation of standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

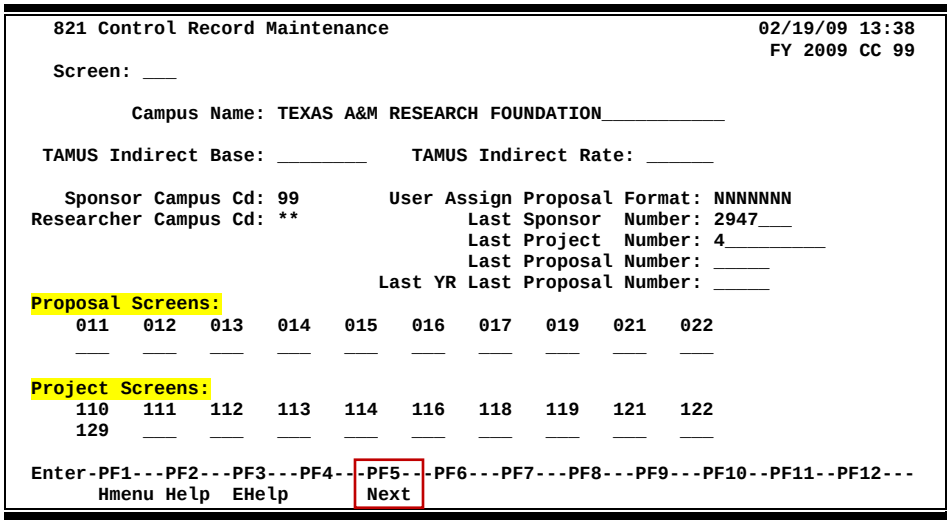
Section III
Proposal Maintenance

Control Record Maintenance

Screen 821 may be used to define which screens must be accessed for proper proposal maintenance within a system part. For example, Screens 11 through 17, Screen 19, Screen 21 and Screen 22 are required as part of the proposal maintenance process. Screen 18, Screen 20, and Screen 90 are not required as part of this process.

This screen is maintained by FAMIS Services.
The information is campus specific.

Screen 821 – Control Record Maintenance



Add/Modify Proposal Information

Generally, the first step to creating a proposal involves specifying general proposal information pertaining to the entire proposal. You may add proposals and their attributes, or update attribute information as needed using Screen 11.

In the ***Proposal*** field, enter the first 2 digits of the fiscal year. After entering the proposal information, FAMIS will automatically assign a proposal number.

Screen 11 – Proposal General Information – Page 1

```
   011 Proposal General Information - Page 1                      06/28/11 15:02
                                                                   FY 2011 CC 99
   Screen: ___  Proposal: 0900100  Version: ___

       Title: IDENTIFICATION OF UTILITY CONFLICTS AND_                  SRS: _
  Long Title: IDENTIFICATION OF UTILITY CONFLICTS AND SOLUTIONS_____________
              ____________________________________________________________

      Sponsor: 0000846 NAS-NRC-TRB-SHRP
       Status: F       AWARDED - FULLY EXECUTED        Award Version: ___
  Status Date: 09/01/2008                        Submit/Mailed Date: 09/08/2008
 Spn Due Date: __________    Firm Due Date: _  Targeted Mail by Date: __________
      Program: _____________________________   Guidelines: _____________

 Sponsor Req. Amt: 300000.00_____              Amt Funded: _____________
    Proposal Type: P                             RFP Nbr: R15(B)_____________
       Begin Date: 02/01/2009 End Date: 05/30/2012  Linked Project: 4774400000
        CFDA Code: 20.205_                        NSF Category: OTHER___
 Fed Flow Sponsor: 0000730 DOT-FEDERAL HIGHWAY ADMINISTRATION
    System Member: 12  Dept/SDept/Coll: 00220 _____ TT    Entered Date: 09/08/08
 OSP Administered: N                                      Entered Time: 15:38:15
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp        Next        RtSht       Title PCopy
```

Basic Steps

Add Proposals

- Type the last 2 digits of the fiscal year in the ***Proposal*** field and press <ENTER>. FAMIS will automatically assign a proposal number.
- Type a title, sponsor number, status, and proposal type in the fields provided.
- Enter additional information in the available fields, as desired.
- Press <ENTER> to record the proposal information.

Modify Proposals

- Type the proposal number in the ***Proposal*** field and press <ENTER>. You may also type an asterisk (*) in this field and press <ENTER> to select a proposal from the displayed list in the pop-up window.
- Make modifications as needed and press <ENTER> to record the changes.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 digits * Help
Enter a FAMIS proposal identification number.

Version: 3 characters/digits
Identify the version number of the proposal selected.

Screen Information

◆ **Title:** 40 characters PF2 Help
Provide a short name or abbreviation of the proposal title.

SRS: 1 character ? Help
Use to identify if this is an SRS account.
N = No
Y = Yes
Blank = Not applicable/No/Unknown

Long Title: 2 lines/72 characters PF2 Help
Provide the complete title of the proposal. This should be the same as the previous field unless the title is too lengthy for the ***Title*** field.

◆ **Sponsor:** 7 digits ? Help
Provide the FAMIS identification number of the sponsor responsible for the proposal.

◆ **Status:** 1 character ? Help
Indicate the award status of the selected proposal.

Award Version: 3 characters/digits PF2 Help
Identify the version of the proposal to which the award has been issued.

Status Date: 8 digits PF2 Help
Indicate date proposal status was assigned. If left blank, will default to the current date.

Submit/Mailed Date: 8 digits PF2 Help
Indicate the date the proposal was submitted/mailed to the sponsor.
See Screen 808.

Spn Due Date: 8 digits
Indicate the date that the sponsor must receive the proposal.

Firm Due Date: 1 character PF2 Help
Enter "Y" if the sponsor due date is firm.

Targeted Mail by Date: 8 digits PF2 Help
Include the date by which the proposal needs to be sent mailed to the sponsor.

Program: 30 characters **PF2 Help**
Enter the program as defined by the sponsor.

Guidelines: 15 characters
Identify the guidelines as defined by the sponsor.

Sponsor Req. Amt: 15 digits **PF2 Help**
Enter the dollar amount requested from the sponsor for the proposal.

Amt Funded: 15 digits **PF2 Help**
Include the dollar amount of funds that have been authorized by the sponsor for the proposal.

◆ **Proposal Type:** 1 character **? Help**
Indicate the proposal type.

RFP Nbr: 15 characters
Identify the number given in response to a RFP (Request for Proposal) or RFQ.
Only required if Proposal Type = P or Q.

Begin Date: 8 digits **PF2 Help**
Indicate the estimated start date for the proposal.

End Date: 8 digits **PF2 Help**
Indicate the estimated date that the proposed research should end.

Linked Project: 10 digits **? Help**
Include a project number linked with the specified proposal.

CFDA Code: 7 digits **? Help**
Indicate the catalog of Federal Domestic Assistance Code used in federal reports. Used to categorize research done under a CFDA classification.

NSF Category: 8 characters **? Help**
Indicate the agency code for split-out on the NSF report.
Blank = Not specified or Non-Federal
DHHS = Dept of Health & Human Services
DOD = Dept of Defense
DOE = Dept of Energy
NASA = Ntnl Aeronautics & Space Admin.
NIH = Ntnl Institutes of Health
NSF = Ntnl Science Foundation
Other = Other NSF Category
USDA = U.S. Dept of Agriculture

Fed Flow Sponsor: 7 digits **? Help**
Enter the sponsor identification number associated with Federal Flow Through funds. **Can only be entered if Sponsor Type = F.**

System Member: 2 digits **? Help**
Indicate the A&M System part number ultimately responsible for the proposal.

Dept/SDept/Coll: 5 characters each **? Help**
Identify the department or sub-department associated with the proposal. FAMIS will "look-up" the college associated with the department/subdepartment and display it here.

Entered Date: 8 digits
Displays the date the proposal was first entered into FAMIS.

OSP Administered: 1 character
Enter "Y" if the proposal is OSP administered.

Entered Time: 6 digits
Displays the time that the proposal was first entered into the system.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

PF7 **Download Proposal Information**
RtSht Used to download proposal information from FAMIS using Entire Connection. **Only downloads one proposal. See the FAMIS Entire Connection User's Manual for greater details.**

*Used only by TAMRF to create a routing sheet. Also uses IASYS-CAMPUS-CD on **Screen 899** for Director's SSN and title.*

PF9 **Proposal Title**
Title Used to enter additional text, if necessary, for the Long Title: of the proposal. Press <ENTER> to record the information and return to Screen 11.

PF10 **Proposal Copy**
PCopy Used to copy existing proposal information to another proposal. Type the valid information and press <ENTER> to record the information and return to Screen 11.

Proposal General Information – Page 2

Additional information for a proposal is entered on Screen 12, such as the names of research administrator and any cooperating agencies.

Screen 12 may only be used after a proposal has already been created using Screen 11.

Screen 12 – Proposal General Information - Page 2

```
   012 Proposal General Information - Page 2                    02/19/09 14:00
                       GENETIC ANALYSIS OF INNER EAR DEVELOPMEN FY 2009 CC 99
   Screen: ___  Proposal: 9700070  Version: ___

          Research Admin: 9uuuuuuu1   LENN, LONNIE
           Proposal Spcl: 6uuuuuuu7   ANDING, ANNIE
             Budget Spcl: 2uuuuuuu9   SEER, SARA
              Admin Dept: _____ _____

    System Members: Main: 02     Addtn'l: __   __   __   __   __   Off Campus: _
    Cooperating Agencies: ____________________________________________
                          ____________________________________________

                Grant Nbr: 1 R29 DC03405-01_____________________________
             Contract Nbr: ____________________________________________

               TAMRF #: _______ ___        Other Ref #: 1 R29 DC03405-01_________
            Original #: _______ ___        Prior Sys #: _________________
  Mandatory Cost Share: _                     Security: _
  Total Cost Share Amt: 115472.00        Info Restrict: _

  Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
        Hmenu Help  EHelp       Next                    CoAgy
```

Basic Steps

- Type a proposal number in the ***Proposal*** field and press <ENTER>.
- You may also type an asterisk (*) in this field and press <ENTER> to select a proposal from the displayed list in the pop-up window.
- Enter information in the available fields, as desired.
- Press <ENTER> to record the proposal information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 digits * Help
Enter a FAMIS proposal identification number.

Version: 3 characters/digits
Identify the version number of the proposal selected.

Screen Information

Research Admin: 9 digits ? Help
Enter the personal identification number of the research administrator for the proposed research.

Screen 12 – Proposal General Information – Page 2 (cont'd)

Proposal Spcl: 9 digits **? Help**
Indicate the personal identification number of the proposal specialist.

Budget Spcl: 9 digits **? Help**
Indicate the personal identification number of the budget specialist.

Admin Dept: 5 characters each **? Help**
Identify the department administering the proposal.

System Members:

Main: 2 digits **PF2 Help**
Indicate the system member primarily responsible for the specified proposal, as entered on Screen 11.

Addtn'l: 2 digits **? Help**
Include any additional system part members involved with the specified proposal.

Off Campus: 1 character **? Help**
Enter "Y" for off campus payroll or proposal.

Cooperating Agencies: 2 lines/39 characters
Indicate any outside agencies involved with the proposal.

Grant Nbr: 40 digits **PF2 Help**
Include the sponsor assigned grant number, if necessary.

Contract Nbr: 40 digits **PF2 Help**
Indicate the sponsor assigned contract number, if necessary.

TAMRF #: 10 digits
Identify the proposal and version numbers, as assigned by the Texas A&M Research Foundation.

Other Ref #: 15 digits **? Help**
Indicate any additional reference numbers used for proposal information purposes.

Original #: 10 digits
Identify the original proposal and version numbers. If the proposal is copied from another proposal, this number will be system-generated.

Prior Sys #: 15 digits **? Help**
Enter the prior system's proposal number when converted to FAMIS.

Mandatory Cost Share: 1 character **? Help**
Enter "Y" if cost sharing is mandatory or voluntary.

Security: 1 character **? Help**
Indicate the type of security attached to the proposal (classified or non-classified).

Total Cost Share Amount: 15 digits **PF2 Help**
Shows the dollar amount expected to be used for cost sharing.

Info Restrict: 1 character **? Help**
Indicate any restrictions on releasing information about the proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

PF9 **Cooperating Agencies**
CoAgy Used to enter additional text, if necessary, for the Cooperating Agencies associated with the proposal. Press <ENTER> to record the information and return to Screen 12.

Enter Proposal Researcher Information

Proposals may be broken down to reflect specific dollar amounts distributed among different researchers. Researchers and the associated dollar amounts are added on Screen 13. Changes and deletions may also be made using this screen.

Screen 13 – Proposal Researcher Information

```
   013 Proposal Researcher Information                              11/19/12 09:16
                        A HUBBLE VIEW OF THE UNIVERSE: AN          FY 2013 CC 02
   Screen: ___  Proposal: 1215632  Version: ___

  Spon Req. Amt:      23,994.00  Distributed Amt:      23,994.00  Auto Dist: _
    P
  F I Researcher Dept  SDept     Amount        Researcher Name      Dept Name
  _ 1 4uuuuuuu0  PHYS_ _____ _______11997.00 MARSH, MILTON M      PHYSICS AND AS
Center CC: __ Dept: _____ SDept: _____ Admn For CC: __ Dept: _____ SDept: _____

  _ 2 9uuuuuuu2  PHYS_ _____ _______11997.00 THOR, TIM T          PHYSICS AND AS
Center CC: __ Dept: _____ SDept: _____ Admn For CC: __ Dept: _____ SDept: _____

  _ _ __________  _____ _____ _________________
Center CC: __ Dept: _____ SDept: _____ Admn For CC: __ Dept: _____ SDept: _____

  _ _ __________  _____ _____ _________________
Center CC: __ Dept: _____ SDept: _____ Admn For CC: __ Dept: _____ SDept: _____

                          Screen Total:        23994.00

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp        Next  PanON
```

Basic Steps

- Type a proposal number in the ***Proposal*** field and press <ENTER>. You may also type an asterisk (*) in this field and press <ENTER> to select a proposal from the displayed list in the pop-up window.
- Type the appropriate function code in the ***F*** (Function) field to add (A), delete (D), or update (U) proposal researcher information and press <ENTER> to record the additions, deletions or modifications.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 digits *** Help**
Enter a proposal identification number.

Version: 3 characters/digits
Identify the version number of the proposal.

Screen Information

Spon Req Amt: 15 digits **PF2 Help**
Displays the total dollar amount requested for the proposal, as entered on Screen 11.

Screen 13 – Proposal Researcher Information (cont'd)

Distributed Amt: 15 digits
Shows the total dollar amount that has been distributed among the researchers working on the proposal.

Auto Dist: 1 character
Enter "Y" if the sponsor requested amount is to be distributed equally among the selected researchers.

F: 1 character **? Help**
Type the desired function code: add (A), update (U), or delete (D).

PI: 1 digit **? Help**
Identify whether the researcher is a Principal Investigator (1) or a Co-principal Investigator (2).

Researcher: 9 digits **? Help**
Enter the researcher's personal identification number.

Dept: 5 characters **? Help**
Identify the department associated with the specified researcher.

SDept: 5 characters
Include the subdepartment associated with the specified researcher.

Amount: 15 digits **PF2 Help**
Enter the total dollar amount of the award that is to be distributed to the specified researcher.

Researcher Name: 25 characters
Displays the full name of the specified researcher.

Dept Name: 25 characters
Shows the name of the department.

Center
CC: 2 digits **? Help**
Include the Campus Code where the Center department and subdepartment are located.

Dept: 4 characters **? Help**
Enter the department code.

SDept: 4 characters **PF2 Help**
Include the subdepartment code.

Admn For CC: 2 digits **? Help**
Include the Campus Code for the Administered For department and subdepartment.

Dept: 4 characters **? Help**
Enter the Administered For department code.

SDept: 4 characters **PF2 Help**
Include the Administered For subdepartment code.

Screen Total: 15 digits
Provides the total dollar amount of money to be distributed among specified researchers.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

PF6 **Panel On**
PanON Press this key to display information in list format, with 2 additional panels of information.

Enter Proposal Direct/Indirect Costs

Information about indirect costs and direct costs, including dollar amounts for current and subsequent periods as well as how amounts are to be distributed to system members, may be entered using Screen 14.

Screen 14 – Proposal Direct/Indirect Costs

```
014 Proposal Direct/Indirect Costs                              02/19/09 14:17
                        VISION, JOINT CONTROL, COORDINATION AND  FY 2009 CC 99
Screen: ___  Proposal: 0401102  Version: ___

                           Sponsor Req. Amt  Beg Date    End Date
              Current Period: ______72750.00  05/01/2005  04/30/2006
           Subsequent Period:       72750.00  05/01/2006  04/30/2007
                       Total:      145500.00

Base Amt: _____100000.00   Rate: _45.50   Indirect Cost Amt: ______45500.00
    Base: MTDC____        Level: L1_          Justification: J1_

                      -------------- Distribution of Funds --------------
  System Member      Indirect Cost     Pct        Direct Cost      Pct
    02 TAMU          ______32305.00   _71.00      _____100000.00   100.00
    99 TAMRF         ______13195.00   _29.00      _______________  ______
    __               _______________  ______      _______________  ______
    __               _______________  ______      _______________  ______
    __               _______________  ______      _______________  ______
    __               _______________  ______      _______________  ______
             Total:       45500.00   100.00           100000.00   100.00
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

Basic Steps

- Type a proposal number in the ***Proposal*** field and press <ENTER>. You may also type an asterisk (*) in this field and press <ENTER> to select a proposal from the displayed list in the pop-up window.
- Type information in the available fields, as desired.
- Press <ENTER> to record the proposal information.

Proposal Maintenance Process

Indirect Cost Base

The ***Base*** field is used to indicate the basis on which indirect costs are calculated. Base codes are defined on Screen 801 (Indirect Cost Table). The Indirect Cost subcode exclusions are entered on Screen 801. These subcodes indicate the direct costs associated with the proposal. By entering a base code, you notify FAMIS to exclude the subcodes associated with it from use in determining the indirect cost amount.

Screen 801 – Indirect Cost Table

```
801 Indirect Cost Table                                          02/19/09 14:18
                                                                  FY 2009 CC 99
Screen: ___   Base: MTDC____

       Description: MODIFIED TOTAL DIRECT COST_______________

   ---- Subcode Exclusions ----                          Page: 1  of  6

   Func Code        Low    High              Error Message

       _            3511   3511
       _            3521   3521
       _            4702   4702
       _            4712   4712
       _            4723   4723
       _            4751   4751
       _            4782   4782
       _            5399   5399
       _            5554   5554
       _            5567   5567
          ** press ENTER to view more Entries **
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp        Next
```

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 digits * Help
Enter a proposal identification number.

Version: 3 characters/digits
Identify the version number of the proposal.

Screen Information

Current Period

Sponsor Req. Amt: 15 digits
Enter the total dollar amount requested from the sponsor for the current period of the proposal.

Beg Date: 8 digits
Indicate the beginning date of the current period for which funds are requested from the sponsor.

End Date: 8 digits
Indicate the end date of the current period for which funds are requested from the sponsor.

Subsequent Period

Sponsor Req. Amt: 15 digits
Shows the total dollar amount requested from the sponsor for the subsequent period of the proposal.

> If all funds requested from the sponsor are issued during the first (current) period, this field will remain blank.

Beg Date: 8 digits
Indicate the start date of the subsequent period, if any, for which funds are requested from the sponsor.

End Date: 8 digits
Indicate the end date of the subsequent period, if any, for which funds are requested from the sponsor.

Total: 15 digits **PF2 Help**
Shows the total dollar amount requested from the sponsor for the proposal.

Base Amt: 11 digits **PF2 Help**
Provide the total dollar amount to which the indirect cost base rate will be applied.

Rate: 6 digits **PF2 Help**
Indicate the percentage rate used to calculate the indirect cost (normally calculated by Office of Sponsored Projects - OSP.)

Indirect Cost Amt: 11 digits **PF2 Help**
Identify the amount of indirect cost calculated as a percentage of the indirect cost base (i.e. Base Amt * Rate).

Base: 8 characters **? Help**
Indicate on what basis the indirect costs are calculated, as defined on Screen 801.

Level: 3 characters/digits **? Help**
Identify the Indirect Cost Level for the specified proposal, as used on OSP (Office of Sponsored Projects) reports.

Justification: 3 characters/digits **? Help**
Include the Indirect Cost Justification Code, as used on OSP reports.

System Member: 2 characters/digits **? Help**
Indicates which system member is participating in the indirect cost fund distribution for the proposal.

Distribution of Funds

Indirect Cost: 14 digits
Identify the dollar amount distributed to the specified system member.

Pct: 6 digits
Include the percentage of the cost base amount to be distributed to the specified system member.

Direct Cost: 14 digits
Enter the dollar amount associated with the direct costs. Given the percentage amount, FAMIS calculates the direct cost amount.

Pct: 6 digits
Include the percentage amount of the total direct costs to be distributed to the specified system member.

Total: 15 digits
Shows the total sum of costs/percentages listed on the screen.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

Proposal Codes, Keywords, Roll-Up Groups

Use Screen 15 to view and/or modify codes used by the National Science Foundation and the Texas Higher Education Coordinating Board.

> Information must be set up on **Screen 809** in order to view keywords on **Screen 15**. Parts are entered on **Screen 809**.

Screen 15 – Proposal Codes, Keywords, and Roll-up-Groups

```
   015 Proposal Codes, Keywords, and Roll-up Groups              02/19/09 14:22
                        CONOTRUNCAL DEFECTS: GENETIC & NUTRITION FY 2009 CC 99
  Screen: ___  Proposal: 0400102  Version: ___

 National Science Foundation & Texas Higher Education Coordinating Board Codes

                          Activity: 1A_
     Science and Engineering Field: 2F_   NSF Category: NIH_____
         Special Areas of Interest: 3E_
                 Character of Work: 4A_
                 Selection Process: 5A_

 Addtn'l Special Areas of Interest: ___  ___  ___  ___  ___  ___  ___
                                    ___  ___  ___  ___  ___  ___  ___

Keywords: _______________   _______________   _______________   _______________
          _______________   _______________   _______________   _______________
          _______________   _______________   _______________   _______________

Roll-up Group: _____  _____  _____  _____  _____  _____
               _____  _____  _____  _____  _____

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

Basic Steps

- Type a proposal number in the ***Proposal*** field and press <ENTER>. You may also type an asterisk (*) in this field and press <ENTER> to select a proposal from the displayed list in the po***p-up win***dow.
- Enter information in the available fields, as desired, and press <ENTER> to record the proposal information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 digits * Help
Enter a proposal identification number.

Version: 3 characters/digits
Identify the version number of the proposal.

Screen Information

- **Activity:** 3 digits/characters ? Help
  Enter the THECB activity associated with the proposal.

- **Science and Engineering Field:** 3 digits/characters ? Help
  Indicate the THECB engineering or research field associated with the proposal.

NSF Category: 8 characters ? Help
Include the agency code for split-out on the NSF report.

Blank	=	Not specified or Non-Federal
DHHS	=	Dept of Health & Human Services
DOD	=	Dept of Defense
DOE	=	Dept of Energy
NASA	=	Ntnl Aeronautics & Space Admin.
NIH	=	Ntnl Institutes of Health
NSF	=	Ntnl Science Foundation
Other	=	Other NSF Category
USDA	=	U.S. Dept of Agriculture

- **Special Areas of Interest:** 3 digits/characters ? Help
  Identify the areas of interest associated with in the proposal.

- **Character of Work:** 3 digits/characters ? Help
  Indicate the character, or nature of the work involved in the proposal.

- **Selection Process:** 3 digits/characters ? Help
  Include the type of selection process used in the approval of the proposal.

Addtn'l Special Areas of Interest: 3 digits/characters ? Help
Enter any additional areas of interest associated with the proposal.

Keywords: 15 characters ? Help
Include any special words used to identify certain aspects of a proposal. **Parts are entered on Screen 809**. Tables available are the Rodman's Thesaurus (predefined) or part defined.

Roll-up Group: 5 characters
[To be defined at a later date.]

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 Next
Goes to the next screen, if set up on Screen 821.

Enter Proposal Compliance Codes

Screen 16 provides information about forms, committees and subject matter pertaining to compliance guidelines set by the sponsor and/or other entities associated with the proposal.

Screen 16 – Proposal Compliance Codes

```
   016 Proposal Compliance Codes                                  02/19/09 14:27
                          MECHANISM OF VERTEBRATE MESODERM PATTERN FY 2009 CC 99
   Screen: ___  Proposal: 0400105  Version: ___

      F  Committee            Committee                          Type
Typ S      Date                Comment                           Comment

 AS _ 09/22/2003 FORMS REC'D_____________________________ ZEBRAFISH___________
 RD _ __________ _____________________________________ _____________________
 AS _ 10/08/2003 AUP #2003-236 10/8/03-10/8/06___________ ZEBRAFISH___________
 RD _ 10/08/2003 IBC #2003190 EXP 1/6/04 PENDING_________ _____________________
 RD _ __________ NEW FORMS_______________________________ _____________________
 AS _ 10/22/2003 SENT TO SCAN/FILE/SPONSOR/RA____________ _____________________
 RD _ 10/22/2003 SENT TO SCAN/FILE/SPONSOR/RA____________ _____________________
 __ _ __________ _____________________________________ _____________________
 __ _ __________ _____________________________________ _____________________
 __ _ __________ _____________________________________ _____________________
 __ _ __________ _____________________________________ _____________________
 __ _ __________ _____________________________________ _____________________
 __ _ __________ _____________________________________ _____________________

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

Basic Steps

- Type a proposal number in the ***Proposal*** field and press <ENTER>. You may also type an asterisk (*) in this field and press <ENTER> to select a proposal from the displayed list in the pop-***up wind***ow.
- Type information in the available fields, as desired.
- Press <ENTER> to record the proposal information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 digits *** Help**
Enter a FAMIS proposal identification number.

Version: 3 characters/digits
Identify the version number of the proposal selected.

Screen Information

Typ: 2 characters **? Help**
Indicate the type of subjects and/or substances to be used in the proposed research.

FS: 1 character
Indicate the form status. **Type "Y" if the forms have been completed.**

Committee Date: 8 digits
Indicate the date of a committee action.

Committee Comment: 40 characters
Enter any comments concerning action, decision, etc. by the committee.

Type Comment: 20 characters
Provide comments about the type of human/animal/DNA used, or the countries involved in the proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

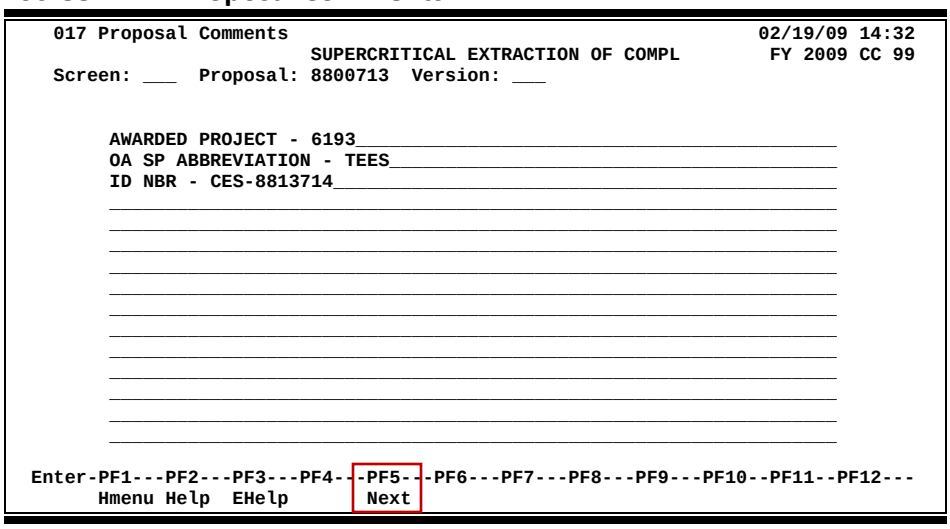
PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

Enter Proposal Comments

Notes concerning the status of a proposal are entered on Screen 17. This screen allows you to enter any additional information needed for the proposal.

> Text is entered without a wrap-around feature. To avoid splitting a word between two lines, use the TAB key to advance to the next text line available.

Screen 17 – Proposal Comments



Basic Steps

- Type a proposal number in the ***Proposal*** field and press <ENTER>. You may also type an asterisk (*) in this field and press <ENTER> to select a proposal from the displayed list in the pop-up window.
- Type comments in the available space, as desired, and press <ENTER> to record the proposal comments.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 digits *** Help**
Enter a FAMIS proposal identification number.

Version: 3 characters/digits
Identify the version number of the proposal.

Screen Information

[Comments] 65 characters/15 lines
Enter comments and information about proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

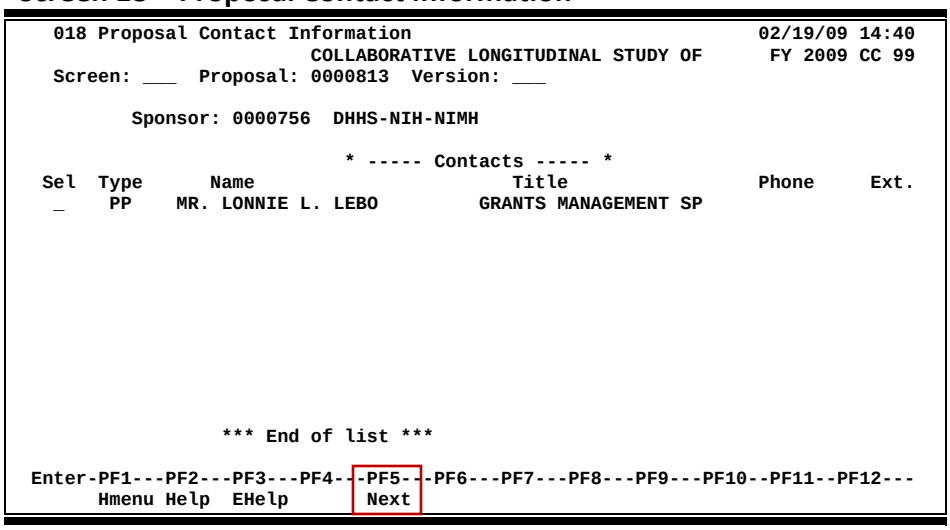
PF5 **Next**

Next Goes to the next screen, if set up on Screen 821.

Display Contacts for a Proposal

Screen 18 is used to view all contacts for a specified proposal that were entered on Screen 19.

Screen 18 – Proposal Contact Information



Basic Steps

- Type a proposal number in the ***Proposal*** field and press <ENTER>.
- You may also type an asterisk (*) in this field and press <ENTER> to select a proposal from the displayed list in the pop-up window.
- Type an "X" in the ***Sel*** (Select) field next to a contact and press <ENTER> to advance to Screen 19 and view detailed contact information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 digits * Help
Enter a FAMIS proposal identification number.

Version: 3 characters/digits
Identify the version number of the proposal.

Screen Information

Sponsor: 7 digits/30 characters PF2 Help
Shows the sponsor number and name associated with the specified proposal.

Sel: 1 character
Type an "X" to select a contact and press <ENTER> to advance to Screen 19 to view additional contact information.

Type: 2 characters **PF2 Help**
Identifies the type of contact.

Name: 25 characters
Displays the full name of the contact.

Title: 20 characters/digits
Indicates the title/function of the proposal contact.

Phone: 10 digits
Shows the area code and phone number of the proposal contact.

Ext: 4 digits
Identifies the phone extension number of the specified contact.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

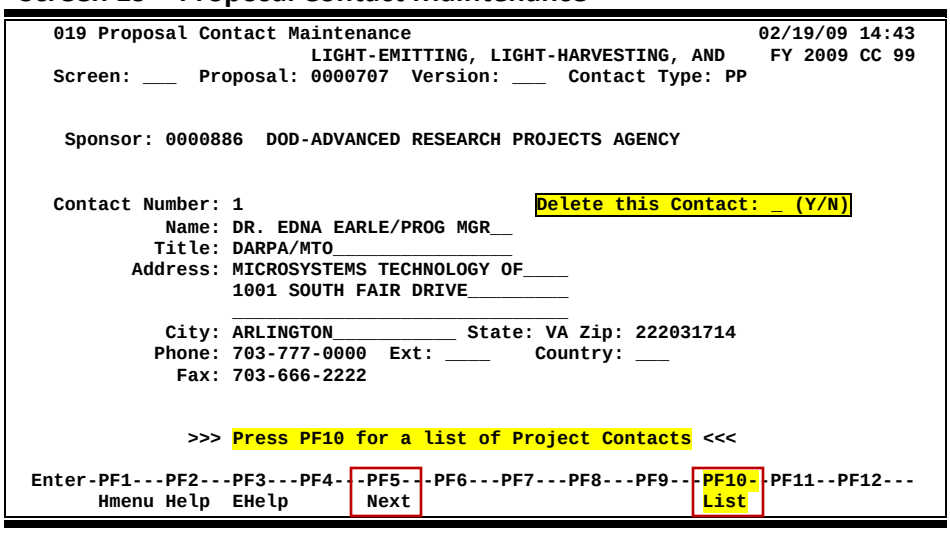
PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

Enter Proposal Contact Information

Details about a contact associated with a proposal are maintained on Screen 19. The fields provide attribute information about the contact person. Press PF10 to view a list of contacts for the proposal, if more than one is specified.

This screen is also used to **delete** a proposal contact.

Screen 19 – Proposal Contact Maintenance



Basic Steps

Add New Proposal Contacts

- Type a proposal identification number and contact type in the fields provided and press <ENTER>.
- Type the name of the contact in the ***Name*** field and add additional information in the available fields.
- Press <ENTER> to record the proposal contact information.

Modify Existing Proposal Contacts

- Type a proposal identification number and contact type in the fields provided and press <ENTER> to display existing proposal contact information.
- Make modifications as needed and press <ENTER> to record the contact information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 digits * Help
Enter a FAMIS proposal identification number.

Version: 3 characters/digits
Identify the version number of the proposal selected.

◆ **Contact Type:** 2 characters ? Help
Indicate the level or position of the proposal contact.

Screen Information

Sponsor: 7 digits/30 characters PF2 Help
Identifies the sponsor number and name associated with the specified proposal.

Contact Number: 3 digits
Displays the system assigned number given to each contact.

Delete this Contact: 1 character
Enter "Y" if the contact should be deleted from the proposal information.

◆ **Name:** 25 characters
Identify the full name of the specified proposal contact.

Title: 25 characters
Include the title/function of the specified proposal contact.

Address: 3 lines/30 characters
Indicate the street address of the contact where correspondence should be mailed.

City: 15 characters
Shows the city for the contact's mailing address.

St: 2 characters ? Help
Indicates the state for the contact's mailing address.

Zip: 9 digits
Identifies the zip code for the contact's mailing address.

Phone: 10 digits
Identify the contact's area code and phone number.

Ext: 4 digits
Indicate the phone extension number for the specified contact.

Country: 3 characters ? Help
Identify the country code of the specified proposal contact.

FAX: 10 digits
Indicate the area code and FAX number for the contact.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

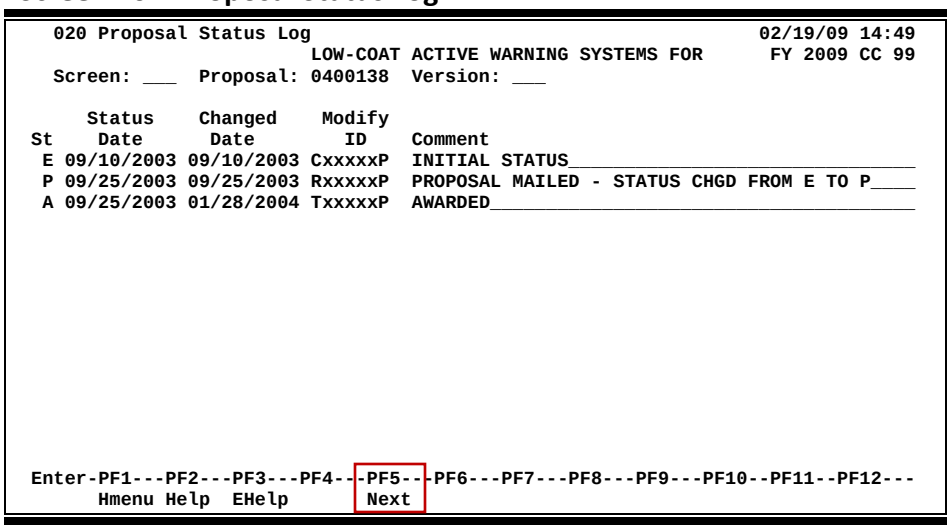
PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

PF10 **List**
List Displays list of available contacts.

Display Proposal Status Logs

Information about a project's status may be viewed on Screen 20. This screen shows the status of a proposal, and when modifications were made. It also displays the FAMIS ID of the person who made the changes and any comments entered.

Screen 20 – Proposal Status Log



Basic Steps

- Type a proposal number in the ***Proposal*** field and press <ENTER>. You may also type an asterisk (*) in this field and press <ENTER> to select a proposal from the displayed list in the pop-up window.
- Type comments in the ***Comment*** field, as needed and press <ENTER>.

Proposal Maintenance Process

Add/Modify Comments

The first line in the ***Comment*** field is used for the initial status of the proposal. This comment cannot be modified. All other comment lines are available for adding additional comments or modification/clarification, as desired.

Proposal Status

The ***St*** (Status) field is used to indicate the status of the award for the proposal. Each time the status is changed on Screen 11, a record of this change will appear on Screen 20. Valid status values include:

VALUES	MEANING
A	AWARDED - PARTIALLY EXECUTED
C	CANCELLED - NOT SUBMITTED
E	PRE-SUBMISSION
F	AWARDED - FULLY EXECUTED
P	PENDING SPONSOR APPROVAL
R	REJECTED BY SPONSOR
V	REVISION SUBMITTED
W	WITHDRAWN FROM SPONSOR REVIEW

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 digits * Help
Enter a proposal identification number.

Version: 3 characters/digits
Identify the version number of the proposal.

Screen Information

St: 1 character
Shows status of the proposal.

Status Date: 8 digits
Displays the date the proposal status was entered.

Changed Date: 8 digits
Displays the date of the status change.

Modify ID: 6 characters/digits
Identifies the user identification number of the person making the proposal status change.

Comment: 45 characters PF2 Help
Enter comments to explain changes made.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

Add/Modify Proposal Cost Sharing Data

Account numbers and other details about the proposed cost sharing data for a proposal is entered or updated on Screen 21.

Screen 21 – Proposal Cost Sharing Data

```
   021 Proposal Cost Sharing Data                                  02/19/09 14:58
                        HEALTH EFFECTS ASSESSMENT FOR COMPLEX     FY 2009 CC 99
   Screen: ___  Proposal: 0001068  Version: ___

        Sponsor Req. Amt:   738915.00
    Total Cost Share Amt:    56187.00    Mandatory Cost Share: _

                                                                    Remaining
                     ----------------- First Period -----------------   Years
    Sponsor Support                                          239665.00   499250.00
 Cost Sharing Acct#  02-130015__ 06-112008__ ___________
                                                              Total
  a. Salaries         ____3038.00 ____7735.00 ___________     10773.00 ___22198.00
  b. Benefits         _____656.00 ____1326.00 ___________      1982.00 ____4064.00
  c. Equipment        ___________ ___________ ___________              ___________
  d. Indirect Cost    ____1625.00 ____3987.00 ___________      5612.00 ___11558.00
  e. Other            ___________ ___________ ___________              ___________
 Total Cost Sharing       5319.00    13048.00                 18367.00    37820.00

     Total Cost                                              258032.00   537070.00

 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp       Next
```

Basic Steps

- Type a proposal number in the ***Proposal*** field and press <ENTER> to display the cost sharing data. You may also type an asterisk (*) in this field and press <ENTER> to select a proposal from the displayed list in the pop-up window.
- Type information in the available fields, as desired.
- Press <ENTER> to record the proposal cost sharing data information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 digits *** Help**
Enter a FAMIS proposal identification number.

Version: 3 characters/digits
Identify the version number of the proposal.

Screen Information

Sponsor Req. Amt: 15 digits **PF2 Help**
Shows dollar amount requested from the sponsor for the proposal.

Total Cost Share Amt: 15 digits **PF2 Help**
Indicates the dollar amount expected to be used for cost sharing.

Mandatory Cost Share: 1 character **PF2 Help**
Enter "Y" if cost sharing is mandatory.

First Period

Sponsor Support: 15 digits
Displays the total dollar amount requested from the sponsor for the first period of the proposal, as defined on Screen 14.

Cost Sharing Acct#: 11 digits
Indicate TAMUS account numbers from which cost sharing will be paid.

Salaries: 11 digits
Enter amount of salary to be cost shared.

Benefits: 11 digits
Enter amount of fringe benefits for cost sharing.

Equipment: 11 digits
Indicate equipment costs to be cost shared.

Indirect Cost: 11 digits
Include indirect cost calculated on cost sharing.

Other: 15 digits
Enter other cost calculation on cost sharing.

Total: 11 digits
Provides the total sum of the amounts entered.

Remaining Years: (a., b., c., d., e.) 11 digits
Enter the total dollar amount requested from the sponsor for the subsequent period of the proposal, as defined on Screen 14.

Total Cost Sharing: 11 digits
Identify the total dollar amount expected to be used for cost sharing.

Total Cost: 11 digits
Displays the total cost of the proposal.

Additional Functions

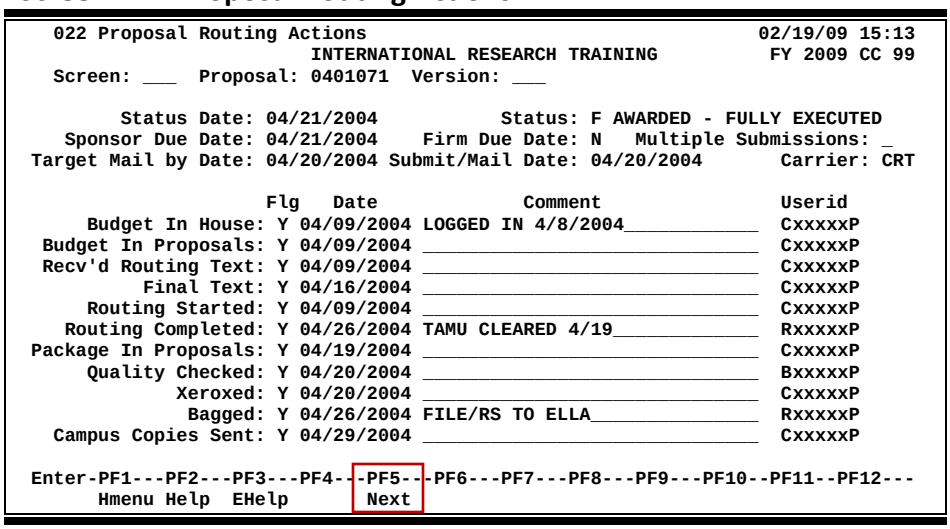
PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

Display Proposal Routing Actions

Each proposal entered in the sponsored research module of FAMIS is tracked and documented through every step in the proposal preparation process. This proposal routing information is available on Screen 22.

Screen 22 – Proposal Routing Actions



```
  022 Proposal Routing Actions                                  02/19/09 15:13
                        INTERNATIONAL RESEARCH TRAINING          FY 2009 CC 99
  Screen: ___  Proposal: 0401071  Version: ___

       Status Date: 04/21/2004          Status: F AWARDED - FULLY EXECUTED
   Sponsor Due Date: 04/21/2004    Firm Due Date: N   Multiple Submissions: _
Target Mail by Date: 04/20/2004 Submit/Mail Date: 04/20/2004       Carrier: CRT

                     Flg   Date             Comment                  Userid
    Budget In House: Y 04/09/2004 LOGGED IN 4/8/2004_____________  CxxxxxP
 Budget In Proposals: Y 04/09/2004 _____________________________  CxxxxxP
 Recv'd Routing Text: Y 04/09/2004 _____________________________  CxxxxxP
         Final Text: Y 04/16/2004 _____________________________  CxxxxxP
    Routing Started: Y 04/09/2004 _____________________________  CxxxxxP
  Routing Completed: Y 04/26/2004 TAMU CLEARED 4/19_____________  RxxxxxP
Package In Proposals: Y 04/19/2004 _____________________________  CxxxxxP
     Quality Checked: Y 04/20/2004 _____________________________  BxxxxxP
            Xeroxed: Y 04/20/2004 _____________________________  CxxxxxP
             Bagged: Y 04/26/2004 FILE/RS TO ELLA_______________  RxxxxxP
  Campus Copies Sent: Y 04/29/2004 _____________________________  CxxxxxP

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

Basic Steps

- Type a proposal number in the ***Proposal*** field and press <ENTER>. You may also type an asterisk (*) in this field and press <ENTER> to select a proposal from the displayed list in the pop-***up wind***ow.
- Enter additional information in the available fields, as desired.
- Press <ENTER> to record the information.

Proposal Routing Process

Proposal Actions

The following is a list of proposal actions currently tracked by FAMIS:

Budget in House	Budget in Proposals
Recv'd Routing Text	Final Text
Routing Started	Routing Completed
Package in Proposals	Quality Checked
Xeroxed	Bagged
Campus Copies Sent	

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 digits * Help
Enter a proposal number.

Version: 3 characters/digits
Identify the version number, if needed.

Screen Information

Status Date: 8 digits PF2 Help
Displays the date the proposal status was originally entered.

Status: 1 character PF2 Help
Indicates the status of the award for the proposal.

Sponsor Due Date: 8 digits
Indicate the date that the proposal must be received by the sponsor.

Firm Due Date: 1 character PF2 Help
Enter "Y" if the sponsor due date is firm.

Multiple Submissions: 1 character
Enter "Y" if a proposal is being assigned multiple numbers and being sent to multiple sponsors.

Target Mail by Date: 8 digits PF2 Help
Enter the date by which the proposal needs to be mailed to the sponsor.

Submit/Mail Date: 8 digits PF2 Help
Indicate the date the proposal was submitted/mailed to the sponsor.

Carrier: 3characters/digits ? Help
Identify the mail carrier used to submit the proposal.

Flg: 1 character
Enter "Y" if a routing action has been completed.

Date: 8 digits
Include the date the routing action was completed.

Comment: 30 characters
Add comments to provide additional information on routing action.

Userid: 6 characters/digits
Shows the User ID of the person who changed information on a specific routing action (system maintained).

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**

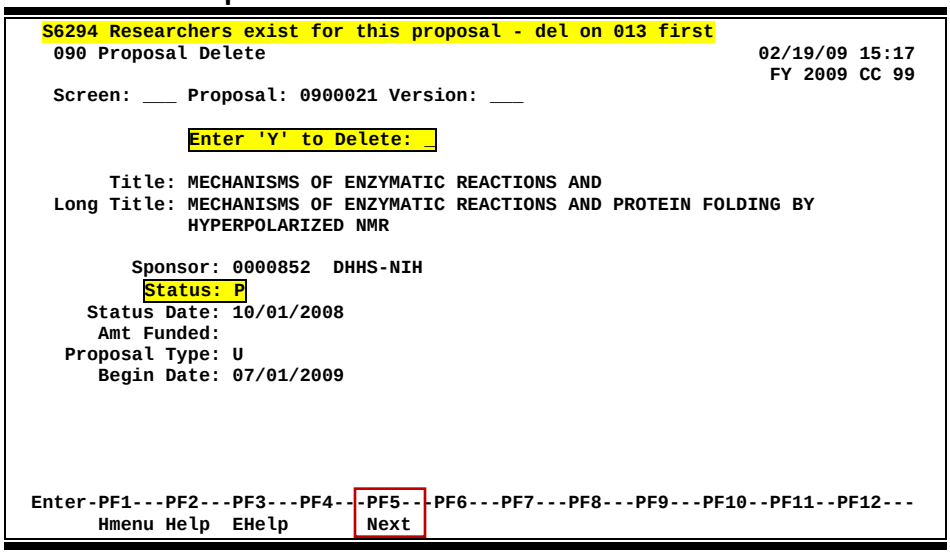
Next Goes to the next screen, if set up on Screen 821.

Delete a Proposal

You may delete a proposal using Screen 90. However, you may **NOT** use this screen to delete the following:

- Proposals with a status of either “A” or “F” (awarded partially or fully)
- Proposals that have researchers assigned to them, without first removing the researcher information from Screen 13.

Screen 90 – Proposal Delete



Basic Steps

- Enter the desired proposal number in the ***Proposal*** field and press <ENTER>.
- To delete the proposal, type “Y” in the ***Delete*** field and press <ENTER>.
- Confirm the deletion by typing “Y” in the pop-up window that appears requesting confirmation to remove the proposal from the system.

Proposal Deletion Process

Proposals with a status of “A” or “F” may not be deleted using this screen.

Confirm Proposal Deletion

Once you have entered “Y” in the ***Delete*** field on Screen 90, a confirmation window will be displayed. Type “Y” in the pop-up window to confirm the deletion of the selected proposal and it will be removed from the system.

Screen 90 – Delete Confirmation Pop-up Window

```
+-----------------------------------------------------------+
|                                                           |
|                                                           |
|     Type 'Y' To Confirm Deletion                          |
|     of Proposal Number: 0000004    (Y/N): Y               |
|                                                           |
|                                                           |
+-----------------------------------------------------------+
```

Proposal Status

The ***Status*** field is used to indicate the status of the award for the proposal. Each time the status is changed (using Screen 11), a record of this change will appear on Screen 90. Valid status values include the following:

```
+-------------------------------------------------------------------+
|  VALUES                          MEANING                          |
|  -------------------------------  ----------------------------    |
|    A                             AWARDED - PARTIALLY EXECUTED     |
|    C                             CANCELLED - NOT SUBMITTED        |
|    E                             PRE-SUBMISSION                   |
|    F                             AWARDED - FULLY EXECUTED         |
|    P                             PENDING SPONSOR APPROVAL         |
|    R                             REJECTED BY SPONSOR              |
|    V                             REVISION SUBMITTED               |
|    W                             WITHDRAWN FROM SPONSOR REVIEW    |
|                                                                   |
|  PF1=Menu PF4=Exit                                                |
+-------------------------------------------------------------------+
```

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 digits
Enter the desired proposal number.

Version: 3 characters/digits
Identify the version number, if needed

Screen Information

Enter 'Y' to Delete: 1 character
Enter "Y" to delete the proposal. A pop-up window will appear requesting confirmation of the deletion.

Title: 40 characters PF2 Help
Provides a short name or abbreviation of the proposal title.

Long Title: 130 characters PF2 Help
Provides the complete title of the proposal.

Sponsor: 7 digits/30 characters PF2 Help
Shows the FAMIS identification number and name of the sponsor responsible for proposal.

Status: 1 character **PF2 Help**
Indicates the award status of the selected proposal.

Status Date: 8 digits
Indicates the date the proposal status was assigned.

Amt. Funded: 15 digits **PF2 Help**
Identifies the dollar amount of funds that have been authorized by the sponsor for the proposal.

Proposal Type: 1 character **PF2 Help**
Indicates the type of proposal.

Begin Date: 8 digits
Displays the estimated start date for the proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

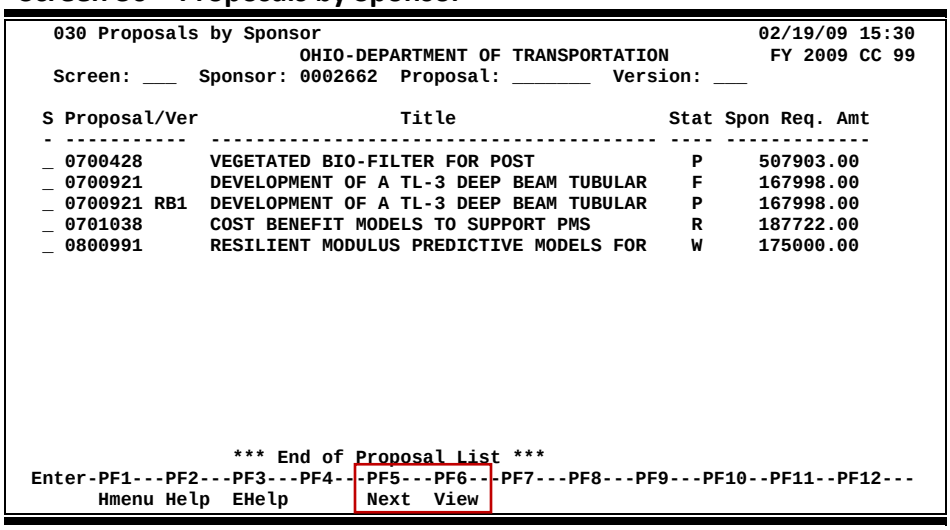
PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

Section IV
Proposal Inquiry

Display Proposals for a Sponsor

Screen 30 displays a list of all proposals for a sponsor, including any subsequent versions.

Screen 30 – Proposals by Sponsor



Basic Steps

- Type a sponsor number in the ***Proposal*** field and press <ENTER>. You may also type an asterisk (*) in this field and press <ENTER> to select a sponsor from the list provided in the pop-***up wind***ow.
- Type an "X" in the ***S*** (Select) field and press <ENTER> to select a proposal and advance to Screen 11 to view additional information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Sponsor:** 7 digits * Help
Enter the desired sponsor number.

Proposal: 7 digits
Indicate the proposal number to be displayed on the first line of the listing, if desired.

Version: 3 characters/digits
Identify the version of the proposal to be displayed on the first line of the listing.

Screen Information

S: 1 character
Type "X" to select a proposal and press <ENTER> to advance to Screen 11, where detailed proposal information will be displayed.

Proposal/Ver: 10 characters/digits
Identifies the proposal and its specific version number, if applicable.

Title: 40 characters **PF2 Help**
Provides a short name or abbreviation of the proposal title.

Stat: 1 character **PF2 Help**
Indicates the status of the award for the proposal.

Spon Req. Amt: 15 digits **PF2 Help**
Identifies the dollar amount requested from the sponsor for the proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 Next
Next Goes to the next screen, if set up on Screen 821.

PF6 View
View View detailed information about the proposal.

Proposals with a Researcher by Sponsor

Use Screen 31 to view a complete list of all researchers who receive support from a specified sponsor. The proposal and version numbers associated with the researcher are displayed, along with the award distribution amount.

Screen 31 – Proposals by Sponsor with Researcher

```
  031 Proposals by Sponsor with Researcher                      02/19/09 15:35
                        DOC-NOAA                                 FY 2009 CC 99
  Screen: ___  Sponsor: 0000821  Proposal: _______  Version: ___
                                 Include Only:  Researcher: _________
S  Proposal/Ver  Sta  Dept          Researcher Name            Distributed Amt
-  ------------  ---  -----   ----------------------------   --------------
_  0000047        R   00203   DREW, DARLA D                        59682.00
_  0000210        F   00080   HARRIS, HARMON H                    371394.00
_  0000210  RB1   V   00080   HARRIS, HARMON H                    225000.00
_  0000419        F   00024   RAY, RONALD R                       125000.00
_  0000458        F   00088   LANDERS, LONA L
                       00088   HARRIS, HARRY H
_  0000458  RB1   V   00088   GRANT, GARY G                        84720.00
                       00088   CRAMER, CARRIE C                    84720.00
_  0000458  RB2   V   00088   GRANT, GARY G                       84720.00
                       00088   CRAMER, CARRIE C                    84720.00
_  0000538        F   00088   IRIS, IDA I
                       00088   CRAMER, CARRIE C
_  0000538  RB1   V   00088   IRIS, IDA I

                *** Press ENTER to View More Proposals ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp        Next  View
```

Basic Steps

- Type a sponsor number in the ***Sponsor*** field and press <ENTER>. You may also type an asterisk (*) in this field and press <ENTER> to select a proposal from the displayed list in the pop-up *wi*ndow.
- Type additional information in the fields provided, as desired, and press <ENTER> to display all proposals and their researchers for the selected sponsor.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Sponsor:** 7 digits * Help
Identify the sponsor whose proposals are to be displayed.

Proposal: 7 digits
Indicate the proposal number to be displayed on the first line of the listing, if desired.

Version: 3 characters/digits
Identify which version of the proposal is to be displayed on the first line of the listing.

Include only:

Researcher: 9 digits
Enter the researcher's UIN or name to restrict the displayed list.

Screen Information

S: 1 character
Type an "X" and press <ENTER> to select a specific proposal and advance to Screen 11, where detailed proposal information will be displayed.

Proposal/Ver: 10 characters/digits
Identifies the proposal and its specific version number.

Sta: 1 character
Indicates the status of the award for the proposal.

Dept: 5 digits
Identifies the department associated with listed researcher.

Researcher Name: 30 characters
Displays the full name of the researcher for the proposal.

Distributed Amt: 15 digits
Indicates the dollar amount distributed to the listed researcher for the proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

PF6 **View**
View View detailed information about the proposal.

Display Proposals for a Researcher

It is possible for you to search proposals and sponsor information for specific researcher information using Screen 32.

Screen 32 – Proposals for a Researcher

```
  032 Proposals for a Researcher                                  02/19/09 15:43
                          ARENS, ARNOLD A                          FY 2009 CC 99
  Screen: ___  Researcher: 5uuuuuuu7  Proposal: _______  Version: ___

 S Proposal/Ver              Sponsor Name            Sta Dept  Distributed Amt
 - -----------  ------------------------------------ --- ----- ---------------
 _ 0100428      NATIONAL SCIENCE FOUNDATION           F  00017        8600.00
 _ 0100654      NATIONAL SCIENCE FOUNDATION           R  00017       67200.00
 _ 0201202      NATIONAL SCIENCE FOUNDATION           F  00017      721260.00
 _ 0201202 RB1  NATIONAL SCIENCE FOUNDATION           V  00017      525000.00
 _ 0300144      DOE-GERMANTOWN                        C  00017
 _ 0400311      NATIONAL SCIENCE FOUNDATION           R  00017      375960.20
 _ 0400623      NATIONAL SCIENCE FOUNDATION           F  00017        9500.00
 _ 0501839      NATIONAL SCIENCE FOUNDATION           F  00018      666919.00
 _ 0600046      NATIONAL SCIENCE FOUNDATION           R  00017      667962.00
 _ 0601955      NATIONAL SCIENCE FOUNDATION           R  00018      583474.00
 _ 0801425      NATIONAL SCIENCE FOUNDATION           F  00018      413999.00
 _ 0900438      NATIONAL SCIENCE FOUNDATION           P  00018      527057.00
 _ 8800190      NATIONAL SCIENCE FOUNDATION           F  00017       75000.00

                  *** press ENTER to view more Proposals ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp        Next  View
```

Basic Steps

- Type a researcher identification number in the ***Researcher*** field and press <ENTER>. You may also type an asterisk (*) in this field press <ENTER> to select a proposal from the displayed list in the pop-up window.
- To view a specific proposal or version, enter the information in the fields provided.
- Press <ENTER> to display a list of proposals for the specified researcher.
- Type an "X" in the ***S*** (Select) field to view additional proposal information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Researcher:** 9 digits * Help
Identify the ID number of the researcher whose proposals are to be displayed.

Proposal: 7 digits
Indicate which proposal is to be displayed on the first line of the listing, if desired.

Version: 3 characters/digits
Identify which version of the proposal is to be displayed on the first line of the listing.

Screen Information

S: 1 character
Type "X" and press <ENTER> to select a proposal and advance to Screen 11, where detailed proposal information will be displayed.

Proposal/Ver: 10 digits/characters
Identifies the proposal number and its specific version number, if applicable.

Sponsor Name: 40 characters **PF2 Help**
Indicates the name of the sponsor associated with the proposal.

Sta: 1 character
Indicates the status of the award for the proposal.

Dept: 5 digits
Identifies the department associated with listed researcher.

Distributed Amt: 15 digits
Indicates the dollar amount distributed to the listed researcher for the proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

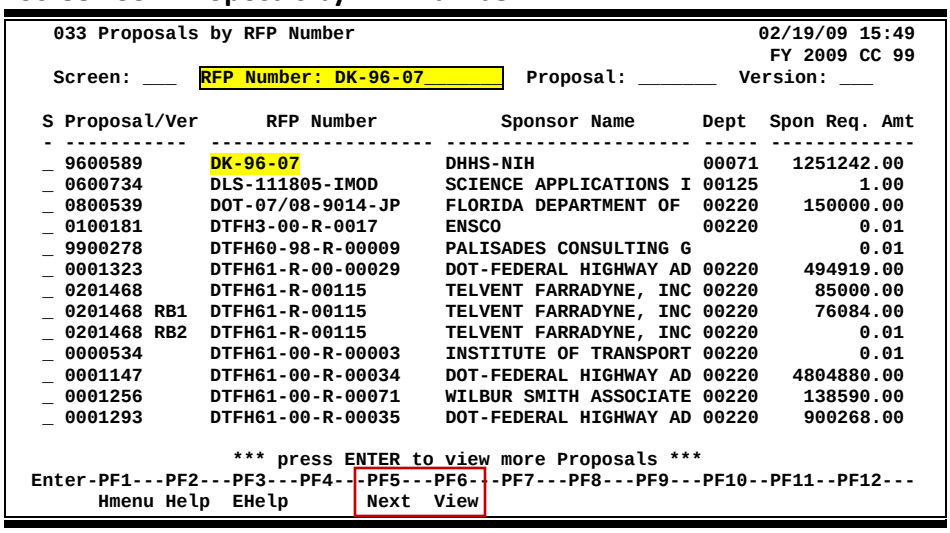
PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

PF6 **View**
View View detailed information about the proposal.

Browse Proposals by RFP Number

Screen 33 displays proposals that are associated with a Request for Proposal (RFP) number. The PF keys at the bottom of this screen provide additional proposal information.

Screen 33 – Proposals by RFP Number



```
  033 Proposals by RFP Number                                  02/19/09 15:49
                                                                FY 2009 CC 99
  Screen: ___  RFP Number: DK-96-07_______  Proposal: _______  Version: ___

S Proposal/Ver      RFP Number          Sponsor Name          Dept  Spon Req. Amt
- -----------  -------------------- ---------------------- ----- -------------
_ 9600589      DK-96-07             DHHS-NIH               00071   1251242.00
_ 0600734      DLS-111805-IMOD      SCIENCE APPLICATIONS I 00125         1.00
_ 0800539      DOT-07/08-9014-JP    FLORIDA DEPARTMENT OF  00220    150000.00
_ 0100181      DTFH3-00-R-0017      ENSCO                  00220         0.01
_ 9900278      DTFH60-98-R-00009    PALISADES CONSULTING G                0.01
_ 0001323      DTFH61-R-00-00029    DOT-FEDERAL HIGHWAY AD 00220    494919.00
_ 0201468      DTFH61-R-00115       TELVENT FARRADYNE, INC 00220     85000.00
_ 0201468 RB1  DTFH61-R-00115       TELVENT FARRADYNE, INC 00220     76084.00
_ 0201468 RB2  DTFH61-R-00115       TELVENT FARRADYNE, INC 00220         0.01
_ 0000534      DTFH61-00-R-00003    INSTITUTE OF TRANSPORT 00220         0.01
_ 0001147      DTFH61-00-R-00034    DOT-FEDERAL HIGHWAY AD 00220   4804880.00
_ 0001256      DTFH61-00-R-00071    WILBUR SMITH ASSOCIATE 00220    138590.00
_ 0001293      DTFH61-00-R-00035    DOT-FEDERAL HIGHWAY AD 00220    900268.00

                 *** press ENTER to view more Proposals ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp        Next  View
```

Basic Steps

- Type all or part of a RFP number or an asterisk (*) in the ***RFP Number*** field.
- You may also include a proposal number and version number in the fields provided to view a specific proposal.
- Press <ENTER> to view a list of proposals by RFP number.
- Type "X" in the ***S*** (Select) field and press <ENTER> to select a proposal and advance to Screen 11 to view additional detailed information.
- The PF5 and PF6 keys may also be used to view additional proposal information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **RPF Number:** 15 characters/digits
Enter the desired RPF number to be displayed, or type an asterisk (*) to display all available RPF numbers.

Proposal: 7 digits
Indicate which proposal is to be displayed on the first line of the listing, if desired.

Version: 3 characters/digits
Identify which version of the proposal, if specified, is to be displayed on the first line of the listing.

Screen Information

S: 1 character
Type "X" and press <ENTER> to select a proposal and advance to Screen 11, where detailed proposal information will be displayed.

Proposal/Ver: 10 characters/digits
Identifies the proposal and its specific version number, if applicable.

RFP Number: 15 characters/digits
Indicates the request for proposal number.

Sponsor Name: 40 characters **PF2 Help**
Shows the name of the sponsor associated with the proposal.

Dept: 5 digits
Identifies the department associated with listed researcher.

Spon Requested Amt: 12 digits **PF2 Help**
Displays the dollar amount requested from the sponsor for the proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 Next
Next Goes to the next screen, if set up on Screen 821.

PF6 View
View View detailed information about the proposal.

Browse Proposals by Keyword

You may search proposals by keywords associated with the proposal using Screen 34. If the keyword is not known, type an asterisk (*) in the ***Keyword*** field.

Keywords are entered on Screen 15.

Screen 34 – Proposals by Keyword

```
  034 Proposals by Keyword                                    02/19/09 15:51
                                                               FY 2009 CC 16
  Screen: ___  Keyword: *_____________  Proposal: _______  Version: ___

 S Proposal/Ver    Keyword            Sponsor Name        Dept   Spon Req. Amt
 - -----------  --------------  ------------------------ ----- ---------------
 _ 0000001      0112089         SERVICIOS INDUSTRIALES,  DBCS         60910.00
 _ 0000002      0112144         IDRA                     DEED         32975.00
 _ 0000003      0112144         WELCH FOUNDATION         DBCS         60000.00
 _ 0000009      0201057         WEST TEXAS STATE UNIVERS DONG         91379.55
 _ 0000002      0500000         IDRA                     DEED         32975.00
 _ 0000009      0502027         WEST TEXAS STATE UNIVERS DONG         91379.55
 _ 0000001      0606045         SERVICIOS INDUSTRIALES,  DBCS         60910.00
 _ 0000020      0606047         TEXAS HIGHER EDUCATION C DBCS         53521.00
 _ 0000018      0606049         FORD FOUNDATION          TCBD         15000.00
 _ 0000012      1102000         CITY OF LAREDO           TCBD         14995.00



                  *** End of Proposal List ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp        Next  View
```

Basic Steps

- Type all or part of a keyword in the ***Keyword*** field and press <ENTER>. You may also type an asterisk (*) in this field and press <ENTER> to view all proposals with a keyword.
- To view a specific proposal and version, type the information in the fields provided and press <ENTER>.
- Type "X" in the ***S*** (Select) field to select a proposal and advance to Screen 11 to view additional detailed information.

Proposal Inquiry Process

Keyword Search

If the keyword is not known, typing a word, portion of a word, number, or an asterisk (*) in the ***Keyword*** field and pressing <ENTER> will list proposals associated with the keyword in alphabetical or numerical order. Type an "X" next to the desired proposal and press <ENTER> to select the proposal and return to Screen 34, where detailed proposal information will be displayed.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Keyword:** 15 characters/digits * Help
Identify the keyword whose proposals are to be displayed, or type an asterisk (*) to view all keywords for your campus code.

Proposal: 7 digits
Indicate which proposal is to be displayed on the first line of the listing, if desired.

Version: 3 characters/digits
Identify which version of the proposal, if specified, is to be displayed on the first line of the listing.

Screen Information

S: 1 character
Type "X" and press <ENTER> to select a proposal and advance to Screen 11, where detailed proposal information will be displayed.

Proposal/Ver: 10 characters/digits
Identifies the proposal and its specific version number, if applicable.

Keyword: 15 characters/digits
Indicates the specific keyword associated with the proposal.

Sponsor Name: 40 characters PF2 Help
Indicates the name of the sponsor associated with the proposal.

Dept: 5 characters
Identifies the department associated with listed researcher.

Spon Req. Amt: 12 digits PF2 Help
Displays the dollar amount requested from the sponsor for the proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 Next
Next Goes to the next screen, if set up on Screen 821.

PF6 View
View View detailed information about the proposal.

Browse Proposals by System Member

Use Screen 35 to search for a proposal by its associated Campus Code or System Member part number.

Screen 35 – Proposals by Research System Member

```
  035 Proposals by Research System Member                          02/19/09 15:53
                                                                    FY 2009 CC 99
  Screen: ___  Research System Member: 02  Proposal: _______  Version: ___
               Sys
S Proposal/Ver Mbr            Sponsor Name          Typ Dept   Spon Req. Amt
- -----------  --- ------------------------------- --- ----- ---------------
_ 0000126      02  NATIONAL SCIENCE FOUNDATION       U  00062       84882.00
_ 0000127      02  NATIONAL SCIENCE FOUNDATION       C  00088     1072215.00
_ 0000127 RB1  02  NATIONAL SCIENCE FOUNDATION       C  00088     1097215.00
_ 0000127 RB2  02  NATIONAL SCIENCE FOUNDATION       C  00088      260503.00
_ 0000137      02  U.S. FILTER                       C  00017       54426.00
_ 0000140      02  TELECOMMUNICATIONS INFRASTRUCTUR  U               20000.00
_ 0000142      02  DHHS-NIH                         R  00012     5158367.00
_ 0000142 RB2  02  DHHS-NIH                         R  00012     4906616.00
_ 0000142 RB3  02  DHHS-NIH                         R  00012     4906616.00
_ 0000145      02  NATIONAL SCIENCE FOUNDATION       U  00062      120030.00
_ 0000145 RB1  02  NATIONAL SCIENCE FOUNDATION       U  00062       78000.00
_ 0000148      02  DHHS-NIH                         U  00017           0.01
_ 0000163      02  NATIONAL SCIENCE FOUNDATION       U  00062       81008.00

               *** Press ENTER to view more proposals ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next  View
```

Basic Steps

- Type a campus code or System Member part number in the ***Research System Member*** field and press <ENTER> to view all proposals for the selected System Member. You may also type a question mark (?) in this field to select a campus code from the displayed list in the pop-up window.
- Type additional information in the fields provided, as needed, and press <ENTER>.
- Type "X" in the ***S*** (Select) field to select a proposal and proceed to Screen 11.

Proposal Inquiry Process

Select a Campus Code

The ***Research System Member*** field is used to indicate the Campus Code or part number of the System Member associated with the proposal. A question mark (?) typed in this field followed by pressing <ENTER> displays a pop-up window with campus code information listed in alphabetical or numerical order. Typing an "X" next to the desired campus code will pass the code back to Screen 34. Press PF4 if you wish to return to Screen 34 without selecting a campus code.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Research System Member:** 2 digits/characters ? Help
Enter the Campus Code of the System Member.

Proposal: 7 digits
Indicate the proposal number to be displayed on the first line of the listing.

Version: 3 characters/digits
Identify which version of the proposal, if specified, is to be displayed on the first line of the listing.

Screen Information

S: 1 character
Type an "X" to select a proposal and advance to Screen 11.

Proposal/Ver: 10 characters/digits
Identifies the proposal and its specific version number, if applicable.

Sys Mbr: 2 digits PF2 Help
Indicates the specific campus code associated with the proposal.

Sponsor Name: 40 characters PF2 Help
Indicates the name of the sponsor associated with the proposal.

Typ: 1 character PF2 Help
Identifies the function type of the contact.

Dept: 5 characters/digits
Identifies the department associated with listed researcher.

Spon Req. Amt: 12 digits PF2 Help
Displays the dollar amount requested from the sponsor for the proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

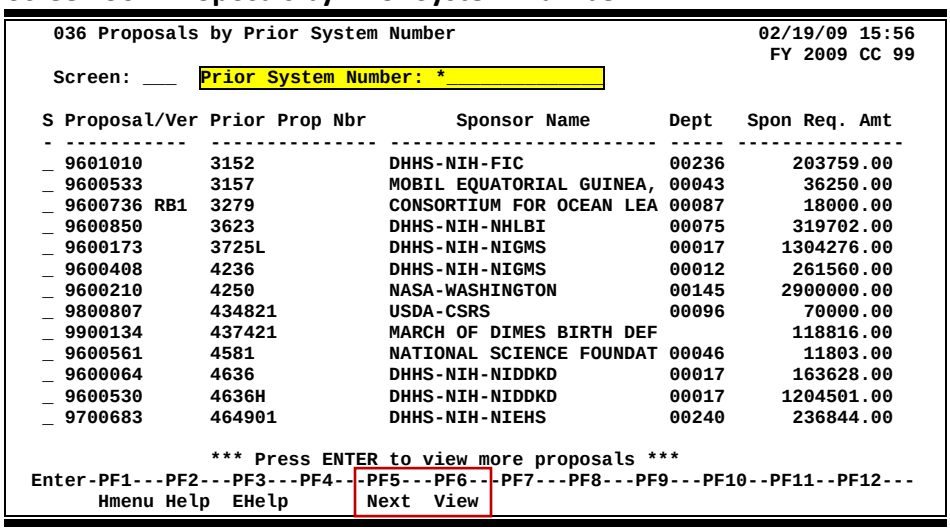
PF5 Next **Next**
Goes to the next screen, if set up on Screen 821.

PF6 View **View**
View detailed information about the proposal.

Browse Proposals by Prior System Number

Screen 36 provides a list of proposals with a prior system number (i.e. the previous identification number under a different system). You may also select a proposal and press PF6 to view researcher information.

Screen 36 – Proposals by Prior System Number



```
   036 Proposals by Prior System Number                          02/19/09 15:56
                                                                  FY 2009 CC 99

   Screen: ___  Prior System Number: *_____________

 S Proposal/Ver Prior Prop Nbr        Sponsor Name          Dept   Spon Req. Amt
 - -----------  ---------------  ----------------------- -----  ---------------
 _ 9601010      3152             DHHS-NIH-FIC            00236      203759.00
 _ 9600533      3157             MOBIL EQUATORIAL GUINEA, 00043       36250.00
 _ 9600736 RB1  3279             CONSORTIUM FOR OCEAN LEA 00087       18000.00
 _ 9600850      3623             DHHS-NIH-NHLBI          00075      319702.00
 _ 9600173      3725L            DHHS-NIH-NIGMS          00017     1304276.00
 _ 9600408      4236             DHHS-NIH-NIGMS          00012      261560.00
 _ 9600210      4250             NASA-WASHINGTON         00145     2900000.00
 _ 9800807      434821           USDA-CSRS               00096       70000.00
 _ 9900134      437421           MARCH OF DIMES BIRTH DEF            118816.00
 _ 9600561      4581             NATIONAL SCIENCE FOUNDAT 00046       11803.00
 _ 9600064      4636             DHHS-NIH-NIDDKD         00017      163628.00
 _ 9600530      4636H            DHHS-NIH-NIDDKD         00017     1204501.00
 _ 9700683      464901           DHHS-NIH-NIEHS          00240      236844.00

                *** Press ENTER to view more proposals ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp        Next  View
```

Basic Steps

- Type a prior system number in the ***Prior System Number*** field and press <ENTER> to display proposals with a prior system identification number. You may also type an asterisk (*) in this field and press <ENTER> to view all proposals with a prior system identification number.
- Type an "X" in the ***S*** (Select) field and press <ENTER> to select a proposal and advance to Screen 11 to view detailed proposal information.
- You may also type "X" in the ***S*** (Select) field and press PF6 to view additional proposal and researcher information.

Proposal Inquiry Process

Prior System Number

If the prior system number is not known, type an asterisk (*) in the ***Prior System Number*** field and press <ENTER> to display a list of all proposals with associated prior system numbers, in numerical order. Type an "X" in the ***S*** (Select) field next to the desired proposal number and press <ENTER> to advance to Screen 11, where detailed proposal information will be displayed.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Prior System Number:** 15 characters
Identify the prior system identification number of the proposals that are to be displayed, or type an asterisk (*) to view all.

Screen Information

S: 1 character
Type "X" and press <ENTER> to select a proposal and advance to Screen 11, where detailed proposal information will be displayed.

Proposal/Ver: 10 characters/digits
Identifies the proposal and its specific version number, if applicable.

Prior Prop Nbr: 15 digits **PF2 Help**
Indicates the proposal identification number associated with the prior system.

Sponsor Name: 40 characters **PF2 Help**
Indicates the name of the sponsor associated with the proposal.

Dept: 5 digits
Identifies the department associated with listed researcher.

Spon Req. Amt: 12 digits **PF2 Help**
Displays the dollar amount requested from the sponsor for the proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 Next
Next Goes to the next screen, if set up on Screen 821.

PF6 View
View View detailed information about the proposal.

Browse Proposals by Sponsor/Submit Date

Screen 37 allows you to view proposals by their sponsors, grouped by the date that the proposals are submitted.

Screen 37 – Proposals by Sponsor/Submit Date

```
   037 Proposals by Sponsor/Submit Date                          02/19/09 15:59
                       MILES STATE UNIVERSITY                     FY 2009 CC 99
   Screen: ___  Sponsor: 0000364  Date: __________

  S Proposal/Ver    Date                  Title                 Sta Spon Req. Amt
  - -----------  ---------- ---------------------------------- --- -------------
  _ 9101179      08/20/1991 SANREM CRSP PROPOSAL                R      13516.00
  _ 9200894      04/27/1992 COWPEA AGRO-MANAGEMENT TECHNIQUES   R     269500.00
  _ 9300098      09/14/1992 MSU-TAMRF SUBCONTRACT               R     105177.00
  _ 9601000      06/06/1996 EVALUATE AND DISSEMINATE            R      65885.00
  _ 9700402      12/10/1996 LATINO POPULATION GROWTH IN THE RU  F      64418.00
  _ 9800152      10/07/1997 DEMOGRAPHIC AND ECONOMIC TRANSFORM  F          0.01
  _ 9700402 RB1  12/19/1997 LATINO POPULATION GROWTH IN THE RU  V      58942.00
  _ 9800655      03/03/1998 NATIONAL CENTER FOR RURAL LATINOS   R     236949.00
  _ 9900065      09/23/1998 SERVICE OF LIFE OF CORROSION        F       7363.00
  _ 9900533      01/21/1999 NETWORK TECHNOLOGY IN TEACHING:     F     150100.00
  _ 9900655      02/10/1999 AN INTEGRATED BAC MAP OF THE CHICK  F     479795.00
  _ 9900533 RB1  03/29/1999 NETWORK TECHNOLOGY IN TEACHING:     V     150300.00
  _ 9900065 RB1  06/11/1999 SERVICE OF LIFE OF CORROSION        V     385375.00

                  *** Press ENTER to view more Proposals ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next  View
```

Basic Steps

- Type a sponsor number in the ***Sponsor*** field, or type an asterisk (*) in this field and press <ENTER> to select a sponsor from the displayed list in the pop-up window.
- Type a submit date in the ***Date*** field, if desired, and press <ENTER> to display a list of all proposals for the sponsor, grouped by their submit date.
- To select a proposal, type an "X" in the ***S*** (Select) field to advance to Screen 11 and view detailed information about a proposal.
- You may also select a proposal and press PF6 to view additional proposal and researcher information.

Proposal Inquiry Process

Sponsor Search and Selection

If the sponsor identification number is not known, typing an asterisk (*) in the ***Sponsor*** field and pressing <ENTER> will access a pop-up window with a complete list of valid sponsors and their identification numbers. You may search by sponsor name by entering an "N" in the ***Type*** field, or by sponsor identification number by entering an "I" in the ***Type*** field. Enter an "X" in the selection field next to the desired sponsor and press <ENTER> to select the sponsor and return to Screen 37. Press PF4 if you wish to return to Screen 37 without selecting a sponsor.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Sponsor:** 7 digits * Help
Identify the sponsor whose proposals are to be displayed.

Date: 8 digits
Indicate the submit date of the proposal to be displayed on the first informational line of the list.

Screen Information

S: 1 character
Type "X" and press <ENTER> to select a proposal and advance to Screen 11, where detailed proposal information will be displayed.

Proposal/Ver: 10 characters/digits
Identifies the proposal and its specific version number.

Date: 8 digits PF2 Help
Identifies the date the proposal was submitted for approval.

Title: 40 characters PF2 Help
Provides a short name or abbreviation of the proposal title.

Sta: 1 character PF2 Help
Indicates the status of the award for the proposal.

Spon Req. Amt: 15 digits PF2 Help
Shows the dollar amount requested from the sponsor for the proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 Next
Next Goes to the next screen, if set up on Screen 821.

PF6 View
View View detailed information about the proposal.

Browse Proposals by Submit Date

It is possible to view a list of all proposals submitted after a specific date, regardless of their sponsor, using Screen 38.

Screen 38 – Proposals by Submit Date

```
  038 Proposals by Submit Date                                  02/19/09 16:01
                                                                 FY 2009 CC 99
  Screen: ___  Date: 12/15/2008  Proposal: _______  Version: ___

                Submit
S Proposal/Ver   Date                 Sponsor                Sta Spon Req. Amt
- ----------- ---------- ---------------------------------- --- -------------
_ 0801640 RB1 12/15/2008 NATIONAL SCIENCE FOUNDATION         V     480000.00
_ 0900246     12/15/2008 NATIONAL SCIENCE FOUNDATION         P     137096.00
_ 0900295     12/15/2008 DHHS-NIH-NIAID                      P     339862.00
_ 0900429     12/15/2008 DEPARTMENT OF EDUCATION             P    2748702.00
_ 0900448     12/15/2008 DHHS-NIH-NIAID                      P     180232.00
_ 0900451     12/15/2008 DHHS-NIH-NINDS                      F     251749.00
_ 0900454     12/15/2008 DHHS-NIH-NCI                        P     176986.00
_ 0900523     12/15/2008 NATIONAL SCIENCE FOUNDATION         P     180216.00
_ 0900562     12/15/2008 NATIONAL SCIENCE FOUNDATION         P     226251.00
_ 0900595     12/15/2008 NATIONAL SCIENCE FOUNDATION         P     769054.00
_ 0900597 RB1 12/15/2008 NATIONAL SCIENCE FOUNDATION         V     290959.00
_ 0900602     12/15/2008 DOC-NOAA                            P    2276110.00

               *** Press ENTER to view more Proposals ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp        Next  View
```

Basic Steps

- Type the desired proposal submit date in the ***Date*** field and press <ENTER>. You may also include the proposal and version number in the fields provided in order to place the proposal number at the top of the list.
- Type an "X" in the ***S*** (Select) field to select a proposal and view additional detail on Screen 11.
- You may also type an "X" in the ***S*** (Select) field and press PF6 to view additional proposal and researcher detail.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Date:** 8 digits
Enter the submit/mailed date of the proposal to be displayed.

Proposal: 7 digits
Indicate the proposal number to be displayed on the first line of the listing.

Version: 3 characters/digits
Identify which version is to be displayed on the first line of the listing.

Screen Information

S: 1 character
Type "X" and press <ENTER> to select a proposal and advance to Screen 11, where detailed proposal information will be displayed.

Proposal/Ver: 10 characters/digits
Identifies the proposal and its specific version number, if applicable.

Submit Date: 8 digits **PF2 Help**
Identifies the date the proposal was submitted for approval.

Sponsor: 40 characters **PF2 Help**
Displays the name of the sponsor associated with the proposal.

Sta: 1 character **PF2 Help**
Indicates the status of the award for the proposal.

Spon Req. Amt: 15 digits **PF2 Help**
Identifies the dollar amount requested from the sponsor for the proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

PF6 **View**
View View detailed information about the proposal.

Browse Proposals by Status

If you want to find all proposals that match a specific award status, use Screen 39. You may limit the list displayed by searching for a specific department, researcher or search by the title. The proposals displayed are sorted by the status code.

Screen 39 – Proposals by Status (Panel 1)

```
  039 Proposals by Status                                        02/19/09 16:16
                                                                  FY 2009 CC 99
  Screen: ___  Status: A  Proposal: _______  Version: ___  All Researchers: _
                     Include Only: Proposal Dept: _____  Researcher: _________
                     Title Search: ____________________________
                     Submit                                  PANEL: 01 MORE >>
S  Prop/Ver   Sta    Date                Sponsor            Dept  Spon Req. Amt
- ---------- --- ---------- ---------------------------- ----- -------------
_ 0001003      A  04/24/2000 PENNSYLVANIA TRANSPORTATION I 00220     28758.00
_ 0100051      A  09/08/2000 NASA-MARSHALL                 00131    200000.00
_ 0100238      A  10/18/2000 NATIONAL SCIENCE FOUNDATION   00062    834629.00
_ 0100894      A  05/31/2001 DHHS-NIH-NHLBI                00432    103069.00
_ 0101129      A  06/08/2001 RHOBIO                                  37750.00
_ 0200654      A  01/31/2002 DOI-MMS-WASHINGTON            00088   6844069.00
_ 0201310      A  07/03/2002 ENSCO                         00220    312882.00
_ 0201321      A  07/11/2002 LOCKHEED-MARTIN ENERGY SYSTEM 00009     63102.00
_ 0201403      A  08/23/2002 NATIONAL SCIENCE FOUNDATION   00017     96000.00
_ 0300053      A  09/20/2002 NASA-GODDARD                  00080     68894.00
_ 0300133      A  12/02/2002 DHHS-NIH-NIEHS                00240    249396.00
_ 0300178      A  01/02/2003 DHHS-NIH-NIGMS                00012    283756.00
                *** Press ENTER to view more Proposals ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next  View                  Left  Right
```

Screen 39 – Proposals by Status (Panel 2)

```
  039 Proposals by Status                                        02/19/09 16:17
                                                                  FY 2009 CC 99
  Screen: ___  Status: A  Proposal: _______  Version: ___  All Researchers: _
                     Include Only: Proposal Dept: _____  Researcher: _________
                     Title Search: ____________________________
<< MORE              Total Cost                              PANEL: 02
S  Prop/Ver   Sta   Share Amount      Researcher Name       Dept  Distributed Amt
- ---------- --- ---------------- ------------------------ ----- ---------------
_ 0001003      A                  BUELLER, BENITA B        00220       74774.00
_ 0100051      A                  HARRIS, HARLAN           00131
_ 0100238      A       20475.00   ARRINGTON, ARTIE A       00062
_ 0100894      A       72887.00   MUSE, MARIAN             00432      103069.00
_ 0101129      A       10010.00   TRENT, THOMAS T          00012
_ 0200654      A                  JOHNSON, JORGE J         00088     3422034.50
_ 0201310      A                  MOORE, MARLA M           00220
_ 0201321      A                  METRE, MEESE M           00093       31551.00
_ 0201403      A         960.00   CORKER, CHARLES C        00017
_ 0300053      A                  BORMAN, BRENDA B         00080       34447.00
_ 0300133      A      109573.00   SANDERS, SARAH S         00240      249396.00
_ 0300178      A                  MARSH, MARSHAL M         00012      283756.00
                *** Press ENTER to view more Proposals ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next  View                  Left  Right
```

Basic Steps

- Enter a status code in the ***Status*** field and press <ENTER>.
- You may also include additional information in the fields provided to limit the number of proposals displayed.
- Type an "X" in the ***S*** (Select) field and press <ENTER> to select a proposal and advance to Screen 11 to view additional detailed information.
- You may also type an "X" in the ***S*** (Select) field and press PF6 to view additional proposal and researcher information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Status:** 1 character ? Help
Indicate the status code of the proposals to be displayed.

Proposal: 7 digits
Indicate which proposal is to be displayed on the first line of the listing.

Version: 3 characters/digits
Identify which version of the proposal is to be displayed on the first line of the listing.

All Researchers 1 character
Enter "Y" to include all researchers.

Include Only: 5 digits ? Help
Proposal Dept: Enter a specific department code to limit display list.

Researcher: 9 digits ? Help
Type the researcher's Universal Identification Number.

Title Search: 30 characters/digits ? Help
Enter any words or patterns located in the title to search for.

Screen Information

→ **Panel 1**

S: 1 character
Type "X" and press <ENTER> to select a proposal and advance to Screen 11, where detailed proposal information will be displayed.

Prop/Ver: 10 characters/digits
Identifies the proposal and its specific version number.

Sta: 1 character **PF2 Help**
Indicates the status of the award for the proposal.

Submit Date: 8 digits **PF2 Help**
Identifies the date the proposal was submitted for approval.

Sponsor: 40 characters **PF2 Help**
Displays the name of the sponsor associated with the proposal.

Dept: 5 digits
Shows the department associated with the researcher.

Spon Req. Amt: 15 digits **PF2 Help**
Identifies the dollar amount requested from the sponsor for the proposal.

→ Panel 2

Total Cost Share Amount: 15 digits
Indicates the dollar amount expected to be used for cost sharing.

Researcher Name: 25 characters
Displays the full name of the specified researcher.

Distributed Amt: 15 digits
Shows the dollar amount distributed.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

PF6 **View**
View View detailed information about the proposal.

Browse Proposals by Sponsor/Program

Screen 40 displays a list of proposals for a sponsor based on their program. You may browse proposals for a sponsor based on their program. Additional information is provided on Panel 2 of this screen by pressing PF11.

Screen 40 – Proposals by Sponsor/Program (Panel 1)

```
  040 Proposals by Sponsor/Program                              02/19/09 16:34
                      TEXAS EDUCATION AGENCY                     FY 2009 CC 99
  Screen: ___  Sponsor: 0001008  Program: ____________________________________
                                                          PANEL: 01 MORE >>
S Proposal/Ver           Program                        Stat Submit Date  Spon Req. Amt
- -----------  ------------------------------ ----  ----------  -------------
_ 0400361      CAREER & TECHNOLOGY EDUCATION    R   11/14/2003      57568.00
_ 0300981      COMPETITIVE GRANTS FY03          F   03/12/2003       6000.00
_ 0001375      CONTINUATION                     R   08/17/2000     200000.00
_ 0101414      CONTINUATION                     R   08/24/2001     200000.00
_ 0201335      EARLY START PROGRAM              F   08/21/2002     244964.00
_ 0201335 RB1  EARLY START PROGRAM              V   03/03/2003     172251.00
_ 0201335 RB2  EARLY START PROGRAM              V   07/09/2003      52036.00
_ 0301439      EARLY START PROGRAM              C                 244964.00
_ 0301275      EL CIVICS                        F   05/22/2003     100000.00
_ 0301275 SU1  EL CIVICS                        C                 100000.00
_ 0301275 SU2  EL CIVICS                        V   06/25/2003     100000.00
_ 0401178      EL CIVICS                        F   05/25/2004     104000.00
_ 0301390      EVEN START                       F   08/05/2003     200000.00

                 *** Press ENTER to view more Proposals ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      Hmenu Help  EHelp       Next  View                    Left  Right
```

Screen 40 – Proposals by Sponsor/Program (Panel 2)

```
  040 Proposals by Sponsor/Program                              02/19/09 16:35
                      TEXAS EDUCATION AGENCY                     FY 2009 CC 99
  Screen: ___  Sponsor: 0001008  Program: ____________________________________
                                                  << MORE        PANEL: 02
S Proposal/Ver           Program                              Title
- -----------  ------------------------------ ------------------------------
_ 0400361      CAREER & TECHNOLOGY EDUCATION  SPECIAL POPULATIONS CAREER AND
_ 0300981      COMPETITIVE GRANTS FY03        RECRUITMENT AND RETENTION OF SPE
_ 0001375      CONTINUATION                   COLONIAS EVEN START PROGRAM
_ 0101414      CONTINUATION                   COLONIAS EVEN START PROGRAM
_ 0201335      EARLY START PROGRAM            EVEN START FAMILY LITERACY PROGR
_ 0201335 RB1  EARLY START PROGRAM            EVEN START FAMILY LITERACY PROGR
_ 0201335 RB2  EARLY START PROGRAM            EVEN START FAMILY LITERACY PROGR
_ 0301439      EARLY START PROGRAM            EVEN START FAMILY LITERACY PROGR
_ 0301275      EL CIVICS                      ENGLISH LITERACY CIVICS EDUCATIO
_ 0301275 SU1  EL CIVICS                      EL CIVICS
_ 0301275 SU2  EL CIVICS                      EL CIVICS
_ 0401178      EL CIVICS                      EL CIVICS
_ 0301390      EVEN START                     EVEN START FAMILY LITERACY PROGR

                 *** Press ENTER to view more Proposals ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      Hmenu Help  EHelp       Next  View                    Left  Right
```

Basic Steps

- Type a sponsor number in the ***Sponsor*** field and press <ENTER>. You may also type an asterisk (*) in the ***Sponsor*** field and press <ENTER> to select a sponsor from the list displayed in the pop-up window.
- Type a program name in the ***Program*** field, if desired, and press <ENTER>.
- Press PF11 to view additional information on Panel 2.
- Type an "X" in the ***S*** (Select) field and press <ENTER> to select a proposal and advance to Screen 11 to view detailed proposal information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Sponsor:** 7 digits * Help
Identify the sponsor number whose proposals are to be displayed.

Program: 30 characters
Indicate the program name of the proposal to be displayed.

Screen Information

→ **Panel 1**

S: 1 character
Type "X" and press <ENTER> to select a proposal and advance to Screen 11, where detailed proposal information will be displayed.

Proposal/Ver: 10 characters/digits
Identifies the proposal and its specific version number.

Program: 30 characters PF2 Help
Indicates the name of the program associated with the specified proposal.

Stat: 1 character PF2 Help
Indicates the status of the award.

Submit Date: 8 digits PF2 Help
Identifies the date the proposal was submitted for approval.

Spon Req. Amt: 15 digits PF2 Help
Identifies the dollar amount requested from the sponsor for the proposal.

→ **Panel 2**

Title: 30 characters
Provides a short name or abbreviation of the proposal title.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

PF6 **View**
View View detailed information about the proposal.

Browse Proposals by Program

If you want to view proposals for a specific program, use Screen 41. This screen shows the proposals in alphabetical order, as well as the name of the sponsor. Press PF11 to view additional information on Panel 2.

Screen 41 – Proposals by Program (Panel 1)

```
  041 Proposals by Program                                    02/19/09 16:41
                                                               FY 2009 CC 99
  Screen: ___  Program: C_____________________________
              Proposal: _______  Version: ___
                                                          PANEL: 01 MORE >>
S Proposal/Ver          Program                        Sponsor
- -----------  ----------------------------- ------------------------------
_ 9700566      CHEM RES INSTRUMENTATION       NATIONAL SCIENCE FOUNDATION
_ 9800506      CHEM RESEARCH INSTRUMEN        NATIONAL SCIENCE FOUNDATION
_ 0400835      CHEM. SCI., GEO, & BIOSCIENCES DOE-WASHINGTON
_ 9500561      CHEMICAL                       NATIONAL SCIENCE FOUNDATION
_ 0001412      CHEMICAL AND BIOLOGIAL OCEANOG NATIONAL SCIENCE FOUNDATION
_ 0001302      CHEMICAL EXPOSURES AND RURAL H DHHS-NIH-NIEHS
_ 0001302 RB1  CHEMICAL EXPOSURES AND RURAL H DHHS-NIH-NIEHS
_ 0101088      CHEMICAL EXPOSURES AND RURAL H DHHS-NIH-NIEHS
_ 0101088 SU1  CHEMICAL EXPOSURES AND RURAL H DHHS-NIH-NIEHS
_ 9900926      CHEMICAL EXPOSURES AND RURAL H DHHS-NIH
_ 9900926 RB1  CHEMICAL EXPOSURES AND RURAL H DHHS-NIH
_ 9900926 RB2  CHEMICAL EXPOSURES AND RURAL H DHHS-NIH

                 *** Press ENTER to view more Proposals ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      Hmenu Help  EHelp       Next  View                    Left  Right
```

Screen 41 – Proposals by Program (Panel 2)

```
  041 Proposals by Program                                    02/19/09 16:42
                                                               FY 2009 CC 99
  Screen: ___  Program: C_____________________________
              Proposal: _______  Version: ___
                                                  << MORE        PANEL: 02
S Proposal/Ver          Title                     Stat Submit Date  Spon Req. Amt
- -----------  ----------------------------- ---- ----------  -------------
_ 9700566      UPGRADE OF DATA ACQUISITION AN   R   01/10/1997     139590.00
_ 9800506      UPGRADE OF DATA ACQUISITION AN   F   01/09/1998      91549.00
_ 0400835      SINGLE-CYCLE STRONG-FIELD        W   03/10/2004     521782.00
_ 9500561      129I: A NEW TRACER FOR CARBON    R   02/14/1995     592061.00
_ 0001412      MEDIATION OF ESTUARINE PHYTOPL   R   08/15/2000     530786.00
_ 0001302      ENVIRONMENTAL AND RURAL HEALTH   F   08/01/2000     216000.00
_ 0001302 RB1  ENVIRONMENTAL AND RURAL HEALTH   V   10/30/2000     216000.00
_ 0101088      ENVIRONMENTAL AND RURAL HEALTH   F   07/27/2001     216000.00
_ 0101088 SU1  ENVIRONMENTAL AND RURAL HEALTH   V   09/10/2001     216000.00
_ 9900926      ENVIRONMENTAL AND RURAL HEALTH   F   05/05/1999     638400.00
_ 9900926 RB1  ENVIRONMENTAL AND RURAL HEALTH   V   10/20/1999     648000.00
_ 9900926 RB2  ENVIRONMENTAL AND RURAL HEALTH   V   11/23/1999     648000.00

                 *** Press ENTER to view more Proposals ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11--PF12---
      Hmenu Help  EHelp       Next  View                    Left  Right
```

Basic Steps

- Type a program name in the ***Program*** field and press <ENTER>. You may also type an asterisk (*) in the ***Program*** field and press <ENTER> to display all proposals.
- Include a proposal and version number in the fields provided to place a proposal at the top of the displayed list.
- Type an "X" in the ***S*** (Select) field and press <ENTER> to advance to Screen 11 and view additional detailed information.
- You may also type an "X" in the ***S*** (Select) field and press PF6 to view additional proposal and researcher information.
- Press PF11 to view more information on Panel 2.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Program:** 30 characters/digits
Enter the program name of the proposal to be displayed on the first informational line of the listing, or type an asterisk (*) to display all proposals.

Proposal: 7 digits
Indicate the proposal number is to be displayed on the first line of the listing.

Version: 3 characters/digits
Identify which version of the proposal is to be displayed on the first line of the listing.

Screen Information

→ **Panel 1**

S: 1 character
Type "X" and press <ENTER> to select a proposal and advance to Screen 11, where detailed proposal information will be displayed.

Proposal/Ver: 10 characters/digits
Identifies the proposal and its specific version number, if applicable.

Program: 30 characters/digits PF2 Help
Indicates the name of the program associated with the specified proposal.

Sponsor: 30 characters PF2 Help
Displays the name of the sponsor associated with the proposal.

→ **Panel 2**

Title: 30 characters PF2 Help
Provides a short name or abbreviation of the proposal title.

Stat: 1 character **PF2 Help**
Indicates the status of the award for the proposal.

Submit Date: 8 digits **PF2 Help**
Identifies the date the proposal was submitted for approval.

Spon Req. Amt: 15 digits **PF2 Help**
Identifies the dollar amount requested from the sponsor for the proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

PF6 **View**
View View detailed information about the proposal.

Browse Proposals by Compliance Code Type

Screen 42 allows you to search for a proposal, even if the only information you have is the Compliance Code type.

Screen 42 – Proposals by Compliance Code Type (Panel 1)

```
  042 Proposals by Compliance Code Type                          02/19/09 16:45
                                                                  FY 2009 CC 99
  Screen: ___  Compliance Code Type: AS  Proposal: _______  Version: ___
                                                                 PANEL: 01 MORE >>
                C/C  Typ  Committee
 S  Proposal/Ver Typ  Fms     Date                  Title
 -  ----------- ---  ---  ----------  ----------------------------------------
 _  0000476 RB1   AS                  DEVELOPMENT OF AN URBAN WATERSHED REHABI
 _  0000477       AS   Y              FOOD WEB STRUCTURE, CARBON SOURCES,
 _  0000477       AS                  FOOD WEB STRUCTURE, CARBON SOURCES,
 _  0000477       AS                  FOOD WEB STRUCTURE, CARBON SOURCES,
 _  0000477       AS                  FOOD WEB STRUCTURE, CARBON SOURCES,
 _  0000477       AS                  FOOD WEB STRUCTURE, CARBON SOURCES,
 _  0000479       AS   Y              INFLUENCE OF DOCOSAHEXAENOIC ACID (DHA,
 _  0000479       AS                  INFLUENCE OF DOCOSAHEXAENOIC ACID (DHA,
 _  0000479       AS       01/26/2000 INFLUENCE OF DOCOSAHEXAENOIC ACID (DHA,
 _  0000479       AS       02/03/2000 INFLUENCE OF DOCOSAHEXAENOIC ACID (DHA,
 _  0000479       AS                  INFLUENCE OF DOCOSAHEXAENOIC ACID (DHA,
 _  0000479       AS       01/11/2001 INFLUENCE OF DOCOSAHEXAENOIC ACID (DHA,

                 *** Press ENTER to view more Proposals ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next  View                      Left  Right
```

Screen 42 – Proposals by Compliance Code Type (Panel 2)

```
  042 Proposals by Compliance Code Type                          02/19/09 16:46
                                                                  FY 2009 CC 99
  Screen: ___  Compliance Code Type: AS  Proposal: _______  Version: ___
                                        << MORE              PANEL: 02

 S  Proposal/Ver          Committee Comment                    Type Comment
 -  ----------- ---------------------------------------- --------------------
 _  0000476 RB1  5/1/00 SENT SECOND REQUEST TO PI   DJL
 _  0000477      PI WILL SUBMIT FORMS TO DARLA__12/06/99
 _  0000477      1/27/00 SENT FORMS TO PI      DJL
 _  0000477      3/3/00 SENT FORMS TO PI      DJL
 _  0000477      3/21/00 SENT TO COMMITTEE       DJL
 _  0000477      5/16/00 SENT STATUS TO COMMITTEE   DJL
 _  0000479      PI WILL COMPLETE FORMS -
 _  0000479      12/16/99 SENT TO COMMITTEE          DJL
 _  0000479      APPROVED BY COMMITTEE      DJL            9-448
 _  0000479      SENT TO AGENCY AND FILED       DJL
 _  0000479      11/15/00 SENT YEARLY FORMS TO PI    DJL
 _  0000479      YEARLY APPROVED BY COMMITTEE   SLH

                 *** Press ENTER to view more Proposals ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next  View                      Left  Right
```

Basic Steps

- Enter a code type in the ***Compliance Code Type*** field and press <ENTER>. You may also type an question mark (?) in this field and press <ENTER> to select a code type from the list displayed in the pop-up window. To view all proposals, type an asterisk (*) in this field and press <ENTER>.
- Enter a proposal and version number in the fields provided and press <ENTER> to advance the list displayed to a specific proposal.
- Press PF11 to view additional information on Panel 2.
- To select a proposal, type an "X" in the ***S*** (Select) field and press <ENTER> to advance to Screen 11 to view additional detailed information.
- You may also type an "X" in the ***S*** (Select) field and press PF6 to view additional proposal and researcher information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Compliance Code Type:** 2 characters ? Help
Indicate the type of Compliance Code for the proposal that is to be displayed on the first informational line of the listing.

Proposal: 7 digits
Indicate which proposal is to be displayed on the first line of the listing.

Version: 3 characters/digits
Identify which version of the proposal is to be displayed on the first line of the listing.

Screen Information

→ **Panel 1**

S: 1 character
Type "X" and press <ENTER> to select a proposal and advance to Screen 11, where detailed proposal information will be displayed.

Proposal/Ver: 10 characters/digits PF2 Help
Identifies the proposal and its specific version number.

C/C Typ: = 2 characters PF2 Help
"Y" indicates the Compliance Code type of subjects and/or substances to be used in the proposal research.

Typ Fms: 1 character
"Y" indicates the form types have been completed in conjunction with the specified Compliance Code type.

Committee Date: 8 digits
Shows the date of a committee action on the associated compliance code.

Title: 20 characters **PF2 Help**
Indicates the title/function of the proposal contact.

→ Panel 2

Committee Comment: 40 characters
Displays comments concerning the Compliance Codes for the proposal.

Type Comment: 20 characters/digits
Indicates the type of human/animal/DNA used, or the countries involved in the proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

PF6 **View**
View View detailed information about the proposal.

Display Linked Awards for a Proposal

Linked awards for a proposal are displayed on Screen 50. This screen provides the project number and award number linked to the proposal.

Screen 50 – Linked Awards for a Proposal

```
050 Linked Awards for a Proposal                                  02/19/09 16:50
                                                                   FY 2009 CC 99
Screen: ___ Proposal: 0000323 Version: ___ Funded:       47985.00

 Project    Awd    Amount     Beg Date          Sponsor Award Number
---------- --- ------------ -------- ----------------------------------------
4459710000 001      47985.00 01/01/00 99004
4459720000 001      50000.00 01/01/01 99004









        Total:       97985.00

               *** END OF PROJECT/AWARD LIST ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp        Next
```

Basic Steps

- Type a proposal number and version number (if necessary) in the fields provided and press <ENTER>.
- You may also type an asterisk (*) in the ***Proposal*** field to select a proposal from the displayed list in the pop-up window.
- Use PF5 to advance to Screen 11 and view additional proposal information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 digits **? Help**
Identify the proposal number whose awards are to be displayed.

Version: 3 characters/digits
Enter which version of the proposal is to be displayed on the first line of the listing.

Funded: 15 digits
Shows the dollar amount funded for the proposal.

Screen Information

Project: 10 digits **PF2 Help**
Identifies the project number associated with the proposal.

Awd: 3 digits
Indicates the award number associated with the proposal.

Amount: 12 digits **PF2 Help**
Displays the dollar amount of the award associated with the proposal

Beg Date: 8 digits **PF2 Help**
Indicates the start date for the award.

Sponsor Award Number: 40 characters/digits
Identifies the number assigned by the sponsor for the specified award.

Total: 12 digits
Displays the total dollar amount of all awards associated with this proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 Next
Next Goes to the next screen, if set up on Screen 821.

Display Proposal Versions

It is possible for a proposal to have more than one version. Use Screen 51 to list all of the versions for a specific proposal.

Screen 51 – Proposal Versions

```
  051 Proposal Versions                                          02/19/09 16:53
                                                                  FY 2009 CC 99
  Screen: ___ Proposal: 0000224 Version: ___  PATHOGENIC ROLES OF COXIELLA BURN

 Sel  Versions                  Title                        Dept   Spon Req. Amt
 ---  --------  ---------------------------------------  -------  -------------
  _      RB1     PATHOGENIC ROLES OF COXIELLA BURNETTI     00427     1605480.00
  _      RB2     PATHOGENIC ROLES OF COXIELLA BURNETTI     00427     1605480.00









                    *** End of Proposal List ***

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp        Next  View
```

Basic Steps

- Type a proposal number in the ***Proposal*** field and press <ENTER>.
- You may also type an asterisk (*) in the ***Proposal*** field and press <ENTER> to make a selection from the displayed list in the pop-up window.
- Type an "X" in the ***Sel*** (Select) field to select a proposal version and advance to Screen 11 to view additional detailed information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 characters * Help
Enter the desired proposal number to be displayed.

Version: 3 characters/digits
Identify which version of the proposal is to be displayed on the first line of the listing.

Screen Information

Sel: 1 character
Type "X" and press <ENTER> to select a proposal and advance to Screen 11, where detailed proposal information will be displayed.

Versions: 3 characters/digits
Identifies the specific version number of the selected proposal.

Title: 40 characters **PF2 Help**
Provides a short name or abbreviation of the proposal title.

Dept: 4 characters/digits
Identifies the department identified with the proposal

Spon Req. Amt: 15 digits **PF2 Help**
Enter the dollar amount requested from sponsor for proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

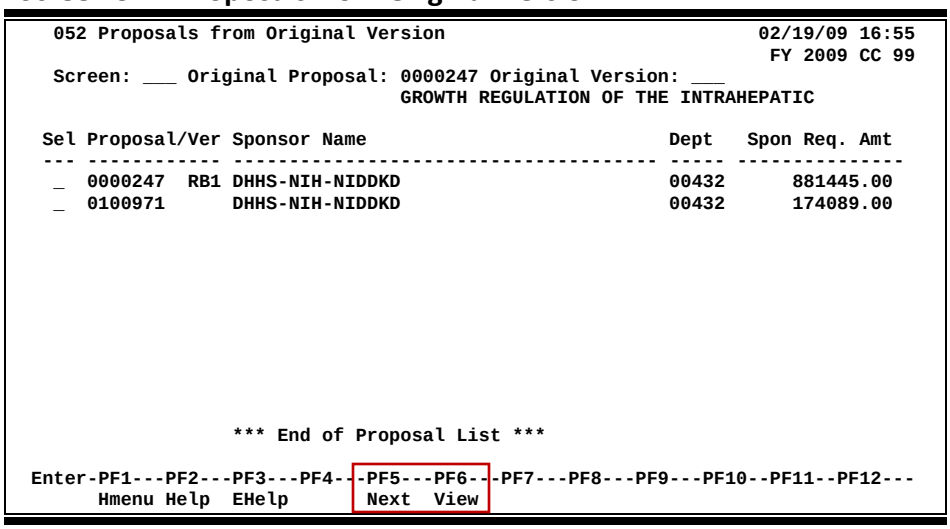
PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

PF6 **View**
View View detailed information about the proposal.

Locate Proposals from the Original Version

It is common practice to copy new proposal information from existing proposals. Information about the original version and the versions associated with it is available on Screen 52.

Screen 52 – Proposals from Original Version



Basic Steps

- Type an original proposal number and original version (if needed) in the fields provided and press <ENTER>.
- You may also type an asterisk (*) in this field and press <ENTER> to select a proposal from the displayed list in the pop-up window.
- Type an "X" in the ***Sel*** (Select) field and press <ENTER> to select a proposal and advance to Screen 11 to view additional detailed information.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Original Proposal:** 7 characters * Help
Identify the original proposal.

Original Version: 3 characters/digits
Identify the version number of the original proposal, if necessary.

Screen Information

Sel: 1 character
Type "X" and press <ENTER> to select a proposal and advance to Screen 11.

Proposal/Ver: 3 digits
Identifies the specific version number of the selected proposal.

Sponsor Name: 40 characters **PF2 Help**
Indicates the full name of the sponsor for the proposal.

Dept: 4 character/digits
Identifies the department associated with the specified researcher.

Spon Req. Amt: 15 digits **PF2 Help**
Displays the dollar amount requested from the sponsor for the proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

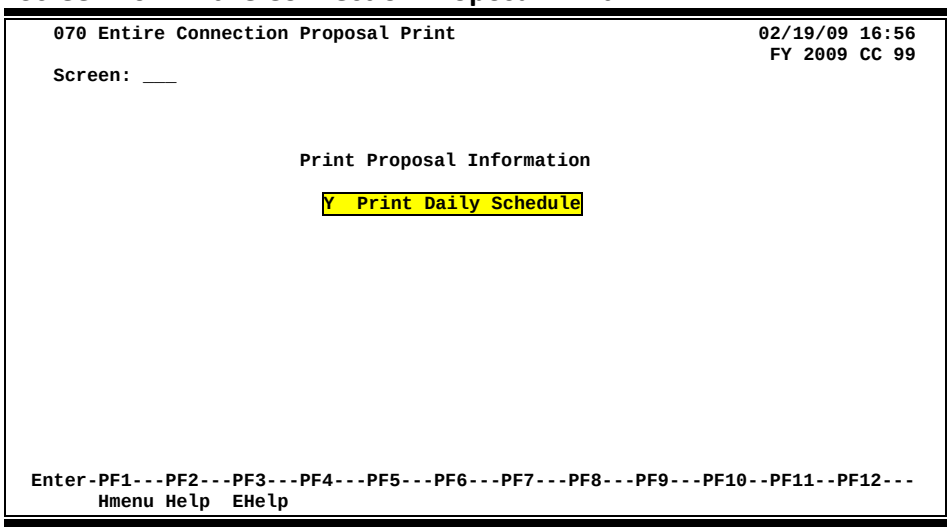
PF6 **View**
View View detailed information about the proposal.

Print Proposals

ENTIRE CONNECTION for Windows is used by The Texas A&M University System (TAMUS) to provide report printing and downloading capabilities from online Natural applications, such as FAMIS.

If you are using ENTIRE CONNECTION to connect to FAMIS, you may use Screen 70 to print proposal information without requesting and waiting for hard copy reports to be delivered.

Screen 70 – Entire Connection Proposal Print



For more information on ENTIRE CONNECTION and its use in conjunction with FAMIS, see the FAMIS Entire Connection User's Manual.

Basic Steps

- Type a "Y" in the ***Print Daily Schedule*** field and press <ENTER> to access a pop-up window to confirm print options.
- Type a begin date and an end date and press <ENTER> to initiate printing.

Proposal Printing Process

Print Setup

Screen 70 allows the user to print proposals directly to their local printer using ENTIRE CONNECTION. However, before this information may be properly printed the following settings must first be made.

Print Manager

In order to properly print account information downloaded from FAMIS screens, the Print Manager on your computer must first be set to print in a font and orientation that will accommodate 132 characters across the width of the page.

- Select the printer to be used for printing the report.
- Paper orientation should be LANDSCAPE.
- Select a fixed pitch font such as LINE PRINTER or COURIER NEW and 8 points or smaller to accommodate 132 characters across the width of the page.
- After the print settings have been completed, press PF9 to print.
- Type "X" beside the type of report to be printed (Detail, Summary or Open Commitment) and press <ENTER>.

Once the Print Manager has been set to print in the **Landscape** orientation, many applications will continue to print in the Landscape orientation.

If you do not wish to continue printing in Landscape orientation, set the orientation to **Portrait** after exiting ENTIRE CONNECTION.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Screen Information

◆ **Print Daily Schedule:** 1 character
Type a "Y" to initiate printing the daily proposal schedule.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

Section V
Project Proposal Transfers

Create Projects/Awards from a Proposal

FAMIS makes it possible for you to create a new project and its first award from an existing proposal. You may use Screen 101 to give a project a system-assigned number or you may assign your own number to the project. This screen will also provide information on the type of project you are entering.

Before you can create a project or an award from a proposal, the proposal status must be set to "A" or "F" on Screen 11.

> This screen is only used to create new projects and their first award. If a project already exists for a proposal, or an award has already been entered in the system, you should use **Screen 111** to work with the existing project.

Screen 101 – Project/Award Create from Proposal

```
  101 Project/Award Create from Proposal                          02/19/09 17:00
                                                                   FY 2009 CC 99
  Screen: ___ Proposal: 9600351 Version: ___   TAMU02 GYRE CABLE ROUTE SURVEY F

   System Assigned Number: Y     User Assigned Number: __________

Copy Proposal Researchers: Y   Copy Proposal Contacts: Y

  Project Instrument Type: G      Instrument Sub-type: CASH
     Project Funding Type: F

 Sponsor Awd Nbr: ____________________________________________ Competitive Seg: _

              Award Type: I                  Amount: 70538.00______
              Begin Date: 02/12/2009       End Date: 02/12/2010

--------------------------------------------------------------------------------
     To start the add of new project, perform one of the following steps:
 1) enter 'Y' at 'System Assigned Number' for system to assign project number
 2) enter ten-digit number at 'User Assigned Number' to assign project number

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

Basic Steps

- Type a proposal number in the ***Proposal*** field. Include a version number, if necessary, and press <ENTER>. You may also type an asterisk (*) in ***the Proposal*** field and press <ENTER> to select a proposal from the displayed list in the pop-up window.
- Type "Y" in the ***System Assigned Number*** field if you would like FAMIS to assign the project number, or you may enter a number in the ***User Assigned Number*** field.
- Using the fields provided, identify if you would like to copy the researchers and/or contacts from the proposal.
- Indicate the project instrument and funding types in the available fields and include any additional information in the fields provided.
- Press <ENTER> to record the information.

Create New Projects

To create new projects from an existing proposal, you must first:

- Enter "Y" in the ***System Assigned Number*** field. This will prompt the system to assign a project number.
  OR
- Enter a 10-digit number in the ***User Assigned Number*** field to define your own project number.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 digits * Help
Specify the proposal number from which an award and project will be created.

Version: 3 characters/digits
Identify the specific version of the proposal from which the award and project will be created.

Screen Information

System Assigned Number: 1 character
Type "Y" if FAMIS should automatically assign a project number.

User Assigned Number: 10 digits ? Help
Identify the project identification number to be created from the proposal.

◆ **Copy Proposal Researchers:** 1 characters
Enter "Y" to copy researchers from the proposal to the project.

◆ **Copy Proposal Contacts:** 1 character
Type "Y" to copy contacts from the proposal to the project.

◆ **Project Instrument Type:** 1 character ? Help
Indicate the type of legal instrument, which initiated the project.

◆ **Instrument Sub-type:** 4 characters ? Help
Indicate a sub category of the type of legal instrument, which initiated the project.

◆ **Project Funding Type:** 1 character ? Help
Identify the type of project funding.

Sponsor Awd Number: 40 digits PF2 Help
Enter the award number, as assigned by the sponsor.

Competitive Seg: 1 character
Type "Y" to separate years with a competitive segment.

◆ **Award Type:** 1 character **? Help**
Indicate the reason for the type of change or addition of the award.

Amount: 14 digits **PF2 Help**
Include the total dollar amount of the award.

◆ **Begin Date:** 8 digits
Identify the date the award will begin for the project.

◆ **End Date:** 8 digits **PF2 Help**
Enter the date the award will end for the project.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

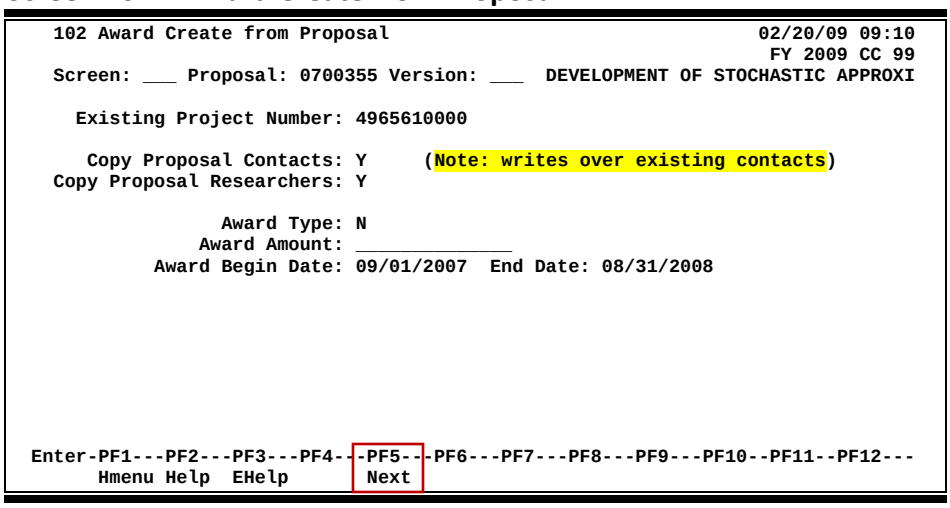
PF5 **Next**
Next Goes to the next screen, if set up on Screen 821.

Create Awards from a Proposal

You may tie a new award to an existing project from an existing proposal using Screen 102. The project must have been created in order to use this screen. If you do not have a project number, use Screen 101 instead.

You can only create one project from a proposal.

Screen 102 – Award Create from Proposal



Basic Steps

- Advance to Screen 102.
- Enter an original proposal number in the ***Proposal*** field. Include a version number in the ***Version*** field, if necessary, and press <ENTER> to display existing information.
- You may also type an asterisk (*) in the ***Proposal*** field and press <ENTER> to select a proposal in the pop-up window.
- Type the number of the project to which you would like to tie the award in the ***Existing Project Number*** field.
- Indicate whether or not you would like to copy the contacts/researchers from the proposal as well as the award type and beginning and ending dates in the available fields.
- Type additional data in the fields provided, as desired, and press <ENTER> to record the award information.

Award Creation Process

Link Projects to the Proposal

Type a question mark (?) in the ***Existing Project Number*** field and press <ENTER> to display a list of existing projects and project information, sorted by Research Title in alphabetical order. Type an "X" in the selection field next to the desired project and press <ENTER> to select the project and return to Screen 102. Press PF4 to return to Screen 102 without selecting a project.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Proposal:** 7 digits * Help
Specify the proposal number from which the award will be created.

Version: 3 characters/digits
Identify the specific version of the proposal from which the award will be created.

Screen Information

◆ **Existing Project Number:** 10 digits PF2 Help
Specify the existing project number to be linked to the award.

◆ **Copy Proposal Contacts:** 1 character
Type "Y" to copy contacts from the proposal to the project.
This writes over existing contacts.

Copy Proposal Researchers: 1 character
Enter "Y" to copy researchers from the proposal to the project.

◆ **Award Type:** 1 character ? Help
Indicate the type of action taken or the reason that the award is being added.

Award Amount: 14 digits PF2 Help
Enter the total dollar amount of the award.

◆ **Award Begin Date:** 8 digits
Identify the date the award will begin for the project.

◆ **End Date:** 8 digits PF2 Help
Include the date the award will end for the project.

Additional Functions

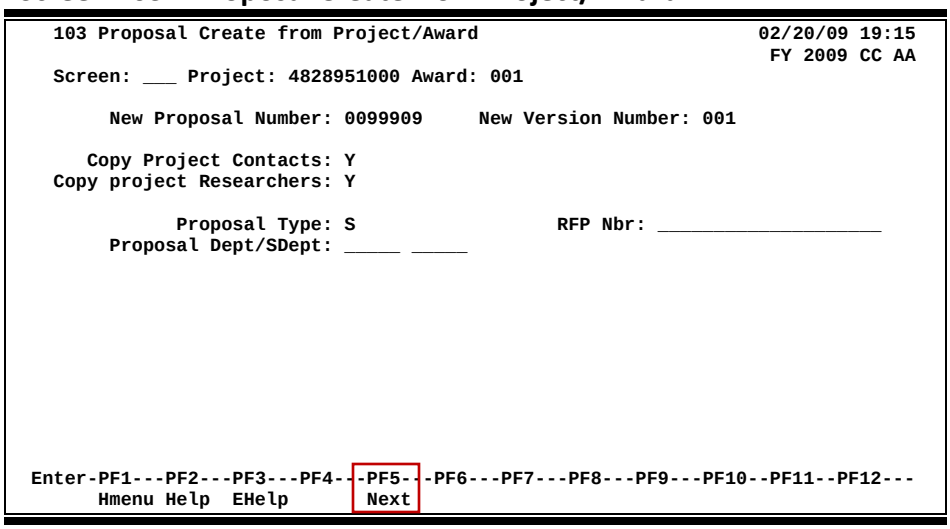
PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 Next
Goes to the next screen, if set up on Screen 821.

Create Proposals from Projects/Awards

It is possible to create a new proposal from an existing project and award. This is accomplished by using Screen 103.

Screen 103 – Proposal Create from Project/Award



Basic Steps

- Type an original project number and the award number in the fields provided and press <ENTER>.
- You may also type an asterisk (*) in the ***Project*** field and press <ENTER> to select a project from the pop-up window.
- Type the new proposal number in the ***New Proposal Number*** field.
- Indicate whether or not the project contacts/researchers should be copied to the proposal, as well as the proposal type in the available fields.
- Enter additional data, as desired, and press <ENTER> to create the new proposal.

Field Descriptions (◆ = Required; Help = Field Help using PF2, ? or *)

Action Line

◆ **Project:** 10 digits * Help
Indicate the project number from which the new proposal will be created.

◆ **Award:** 3 digits
Indicate the award number to be linked with the new proposal.

Screen Information

- **New Proposal Number:** 7 digits ? Help
  Indicate the new proposal number to be created from the specified project and award.

  New Version Number: 3 digits
  Indicates the new proposal version number to be associated with the project number.

  Copy Project Contacts: 1 character
  Enter "Y" to copy the contacts from the project to the new proposal.

- **Copy Project Researchers:** 1 character
  Type "Y" to copy the researchers from the project to the new proposal.

- **Proposal Type:** 1 character ? Help
  Indicate the type of proposal to be created from the selected project and award.

  RFP Nbr: 15 digits
  Identify the Request for Proposal number.

  Proposal Dept/SDept: 5 characters each ? Help
  Include the department/subdepartment associated with the proposal.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

PF5 Next **Next**
Goes to the next screen, if set up on Screen 821.

Section VI
Appendix

Instructions

Listed below are general instructions that will make your job easier as you use FAMIS to input or view document information. Please become familiar with the information in this reference as it can make your navigation in FAMIS more efficient.

3270 Emulation Keys

Special keys and key combinations must be used when working with FAMIS. These keys are known as 3270 emulation keys and may be defined differently by each 3270 terminal or PC emulation software that you are using. Contact your computer support person if you do not know how to identify the following keys on your computer.

PF Keys

When a key is listed as **PFn**, "PF" represents Program Function. Many PCs use the function keys labeled **Fn** for these PF keys. Others have special combinations of keys to represent the PF keys, for example, on a Memorex emulation, a combination of the ALT key and the number 1 will represent the PF1 key.

At the bottom of the FAMIS screens, there are PF keys listed that can assist in the use of the screen. For example, at the bottom of Screen 164 (Voucher Inquiry by PO Number) there is a PF11 key with the word "Right" under it. This means that by pressing PF7, the screen listing will scroll to the right for an additional panel of information.

TAB and BACKTAB Keys

Use the **TAB** and **BACKTAB** keys on a 3270 terminal to move from field to field. This will position the cursor at the start of each field. Most PCs have a key labeled TAB, while the BACKTAB is a combination of the SHIFT/TAB keys.

Using the arrow keys, instead of the TAB keys, to move around the screen may lock the computer keyboard. Use the **RESET** key, then the **TAB** key, to position the cursor and unlock the keyboard.

CLEAR Key

The **CLEAR** key on many PC keyboards is the **PAUSE** key. This key is often used to clear, or refresh, the screen before typing.

RESET Key

After pressing <ENTER> to process data information, note the status bar at the bottom of the screen. When the system is processing information, the symbol "**X ( )**" or hour glass icon (⌛) will appear. You cannot enter additional information until the system is finished processing. If any other symbols appear, press your **RESET** key -- often the **ESCAPE** key on a PC.

ERASE END OF FIELD Key

To erase all the information in a field with one stroke, the **ERASE EOF** key on a 3270 keyboard is helpful. For example, a vendor name is held in context when moving from screen to screen. To change to a different vendor, use this key and the current vendor name on the Action Line will be removed. Now the new vendor name can be input. On most PCs, the correct key to use is the **END** key on the numeric keypad.

HOME Key

From anywhere on the screen, the most efficient way to take the cursor back to the ***Screen*** field on the Action Line is by pressing certain keys. For the 3270 terminals, the correct combination is the **ALT/RULE** keys. On most PCs, the **HOME** key on the numeric keypad will work.

Protected Area

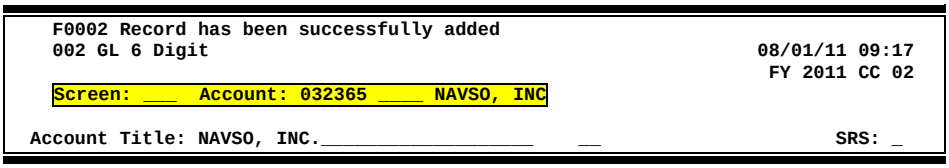
The ***Protected Area*** is the area of the screen that will not allow the user to enter information. Typing information in the protected area may freeze the screen. Use your ***reset*** key and then ***tab*** key to release your system when it freezes.

Action Line/Context

The ***Action Line*** is usually the first line of information on each screen. The ***Screen*** field is used to navigate from screen to screen by entering the number of the screen desired. Fields such as screen, vendor, voucher number, account, etc. are often found on the Action Line.

Data that is entered on the Action Line will be carried in "context" from screen to screen until changed. For example, the GL account number 032365 is entered on the Action Line of the screen below. That account will be carried in "context" until the user keys a different account in the field.

The <**ENTER**> key must be pressed after entering **Action Line** data. If a user does not follow this step, all information entered on the screen may be lost and must be re-entered. After pressing <ENTER>, a message will be given at the top of the screen asking for modifications or providing further processing instructions.



Message Line

The line above the Action Line is used to display messages to the user. These messages may be error messages or processing messages, such as the one below.

Scrolling Through Data

Pressing <**ENTER**> will scroll through information listed on a screen. On some screens, there are PF keys to use to scroll forward, backward, left and right. These PF keys are displayed at the bottom on the screens with that function.

Help

HELP functions are available for many screen fields in FAMIS. Typing a question mark (?) in the blank beside the desired field and pressing <ENTER> will access a pop-up window with specified field information. Another way is to place your cursor in the desired field and press PF2.

To get out of the HELP function, either select a value and press <ENTER> or press **PF4**. The distinction on which key to use will normally be designated in the pop-up window (EX: **PF4** = Exit).

Escaping from a Pop-Up Window

When in a pop-up window, pressing **PF4** will usually take you back to the original screen. There are a few screens when pressing <ENTER> will take you back to the original screen.

Field Help Using the F2 Program Function Key

On selected fields, additional information can be displayed using the F2 program function key. This HELP information is accessed by moving the cursor to the field in question and pressing PF2.

Screen 2 – GL 6 Digit

```
  002 GL 6 Digit                                                 08/01/11 09:17
                                                                  FY 2011 CC 02
  Screen: ___  Account: 010100 ____ ED & GEN INCOME-TUITION

Account Title: ED & GEN INCOME-TUITION_____________                    SRS: _
  Resp Person: 5uuuuuuu4 MASON, MOLLY M              Old Acct: NA_____________
Year-end Process: F    Reclassify: _  Reporting Group: __  Aux Code: ___
  AFR Fund Group: __   Fund Group: FG  Sub Fund Group:      Sub-Sub: __
        Function: __

    Default Bank: 06000      Override: Y      SL Mapped Count: 22
 Alternate Banks: *****  _____  _____  _____  _____  Security: ______

                Dept  S-Dept Exec Div Coll Mail Cd Stmt
   Primary:     REV__ _____   UN   AD       C6000    N
 Secondary:     VTEA_ _____   AA   CD  VM   C4457    N


Fund Source: __ _____________________________________      Account Letter: Y
 Long Title: EDUCATIONAL AND GENERAL INCOME - TUITION     Setup Dt: 08/26/1991
             ____________________________________

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

The first help screen describes the field.

```
Field: FS-MJR-FUND-SRC                  File: IAFRS-GENERAL-SUBSIDIARY-LEDGER

This attribute specifies the major funding source for this account.
i.e. General operation fund, loan funds. This attribute is also used
for roll-up reporting breakdowns by funding source in programs
FBMR046 and FBMR047.
```

Press <ENTER> to display the valid values for the field.

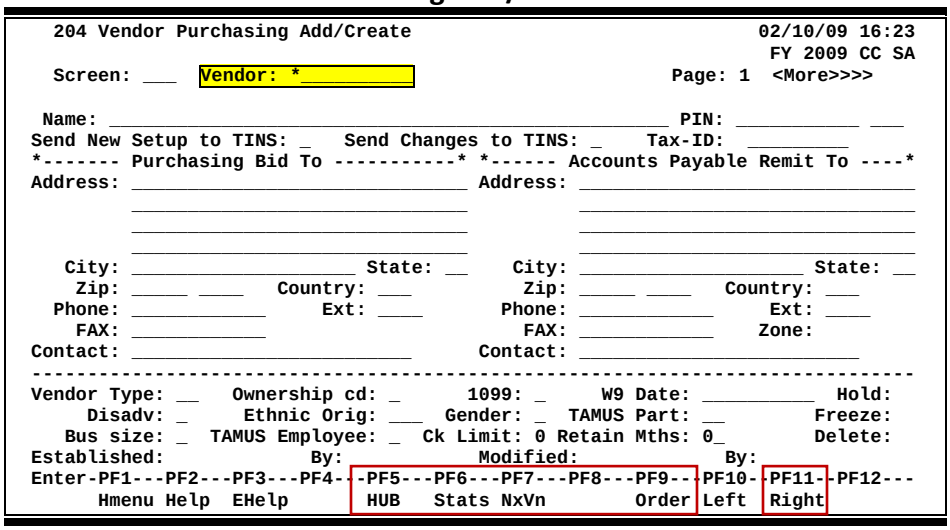
```
+-----------------------------------------------------------------
|
|              *** D I C T I O N A R Y - H E L P ***
|
|  VALUES                          MEANING
|  -------------------------------  ----------------------------
|  BLANK                           NOT SPECIFIED
|  01                              EARNINGS ON ENDOWMENT
|  02                              GIFTS OR DONATIONS
|  03                              TRANSFER FROM ANOTHER ACCOUNT
|  04                              INTEREST ON TIME DEPOSITS
|  05                              STATE GENERAL REVENUE
|  06                              AVAILABLE UNIVERSITY FUND
|  07                              GRANT OR CONTRACT
|
|  Lookup Value / . Menu  _____________________________
|  Rule : IAFRS-FS-MJR-FUND-SRC            Default value is:
|  View : IAFRS-GENERAL-SUBSIDIARY-LEDGER
|  Field: FS-MJR-FUND-SRC
|
|  PF1=Menu PF4=Exit
+-----------------------------------------------------------------
```

Question Mark (?) or Asterisk (*) Help

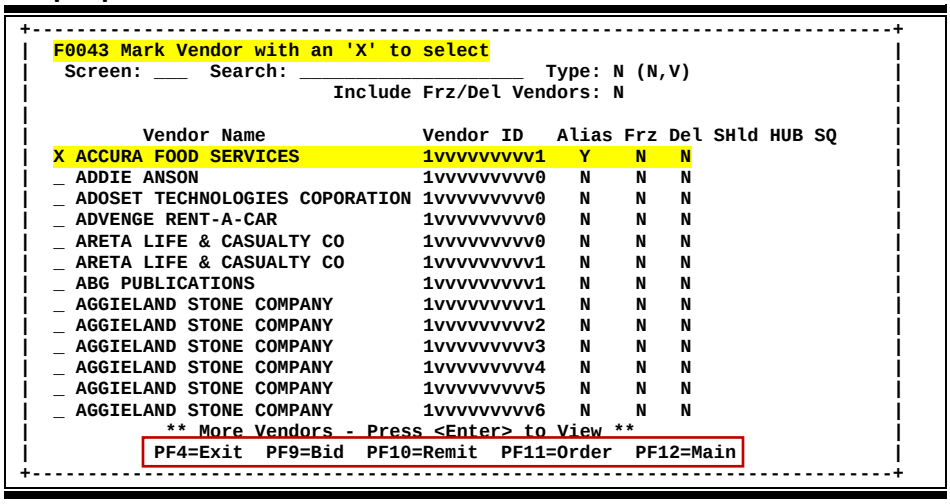
FAMIS has a Help feature on some screen fields that will display a field definition and/or values that may be entered.

To use the Help feature, type a question mark (?) or asterisk (*) in the field and press <ENTER>. If Help is available for the field, a pop-up window will appear displaying a definition and/or valid values. To make a selection, type an "X" next to a value and press <ENTER> to pass it back to the previous screen. This is called the "Passback" feature.

Screen 204 – Vendor Purchasing Add/Create



Pop-Up Window with available vendors to select



After making a selection from the pop-up window of available vendors, you will be returned to the main screen and the information for the selected vendor will be displayed.

Screen 204 – Vendor Purchasing Add/Create

```
   204 Vendor Purchasing Add/Create                              02/18/09 14:37
                       ACCURA FOOD SERVICES LLC                   FY 2009 CC 02
   Screen: ___  Vendor: 1vvvvvvvvv1   ** ACH VENDOR **    Page: 1  <More>>>>

  Name: ACCURA FOOD SERVICES LLC_____________________ PIN: 1xxxxxxxxx8 000
Send New Setup to TINS: _   Send Changes to TINS: N    Tax-ID:  2xxxxxxx7
*------- Purchasing Bid To -----------* *------ Accounts Payable Remit To ----*
Address: _____________________________ Address: PO BOX 88888_________________
         _____________________________          _____________________________
         _____________________________          _____________________________
         _____________________________          _____________________________
    City: ____________________ State: __    City: AUSTIN_____________ State: TX
     Zip: _____ ____    Country: ___          Zip: 78708 1515   Country: ___
   Phone: _____________     Ext: _____       Phone: _____________     Ext: ____
     FAX: _____________                       FAX: _____________    Zone:
 Contact: _____________________          Contact: ____________________________
--------------------------------------------------------------------------------
Vendor Type: BU   Ownership cd: P      1099: _     W9 Date: 12/01/2008  Hold: N
     Disadv: _     Ethnic Orig: ___  Gender: _  TAMUS Part: __        Freeze: N
   Bus size: _  TAMUS Employee: _  Ck Limit: 0 Retain Mths: 18        Delete: N
Established: 12/05/2008  By: TxxxxxP    Modified: 12/05/2008  By: TxxxxxP
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       HUB   Stats NxVn        Order Left  Right
```

Standard PF Keys

PF Keys are used in Financial Accounting to access additional information. Wherever possible the same assignment has been given to the same PF key, such as PF2 always being the key used for HELP. Occasionally this has not been possible and a different assignment has been made.

The following list is to help you identify the functionality behind the PF keys that you will see on the many screens in the SPR module of FAMIS.

Many screens have extended information windows assigned to various function keys that are designated at the bottom of each screen and pop-up window. Placing the cursor (using the cursor arrow keys) on a particular line and pressing the extended information function key will display the pop-up window information for the document or item on that line.

Exiting a pop-up window is done by pressing <PF4> to return to the previous window or inquiry screen. If multiple windows have been opened pressing <PF3> will return you directly to the screen where you started.

From within many of the pop-up windows an additional set of extended function keys may appear to further inquire on the document or item.

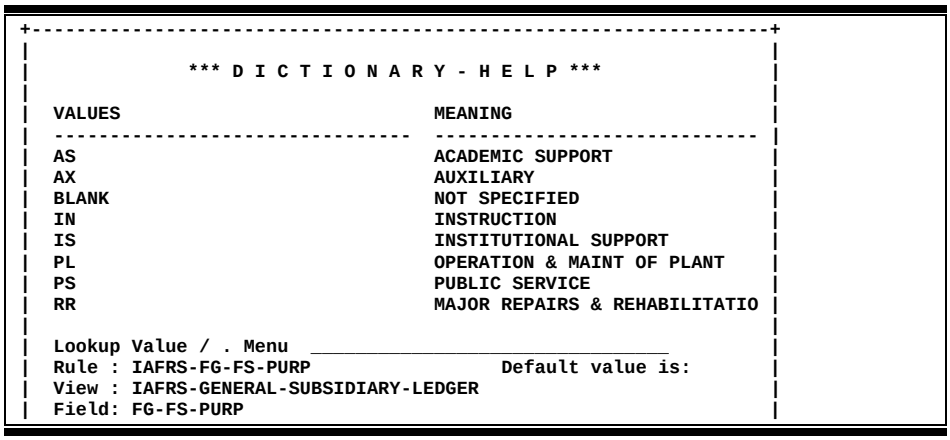
Extended Function Keys

EHelp **Not Used in FAMIS**

ERRS Displays a window of errors. When available, also displays on-line help for current errors.

Help **On-Line Help**
On selected fields, additional information may be displayed. This information is access by moving the cursor to the field in question and pressing PF2 for Help. The first screen accessed will describe the field; pressing <ENTER> will display any valid values available for the field (see below).

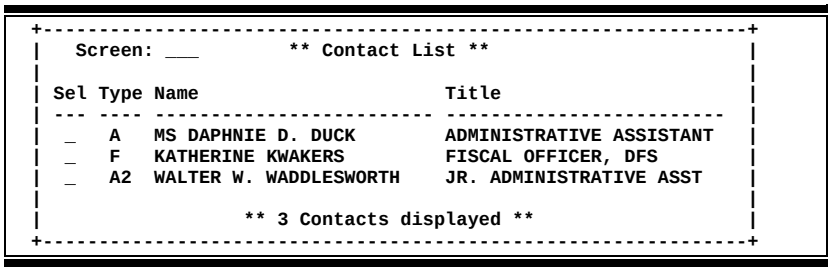
```
DESCRIPTION:  AN INSTITUTIONALLY DEFINED CODE THAT GROUPS CURRENT FUND
EXPENDITURES ACCORDING TO THE PURPOSE FOR WHICH COSTS WERE INCURRED.
```



HMenu **Not Used in FAMIS.**

LEFT **Scroll Screen Left**
Some windows are made up of several adjacent panels. These will be designated by the word **Panel: ##** appearing in the window. Pressing this key scrolls the panel to the **left**.

List **Contact List**
Displays a complete list of contacts for a specified sponsor or proposal. Typing an "X" beside the appropriate contact and pressing <ENTER> will take you back to the screen where detailed contact information will be displayed.

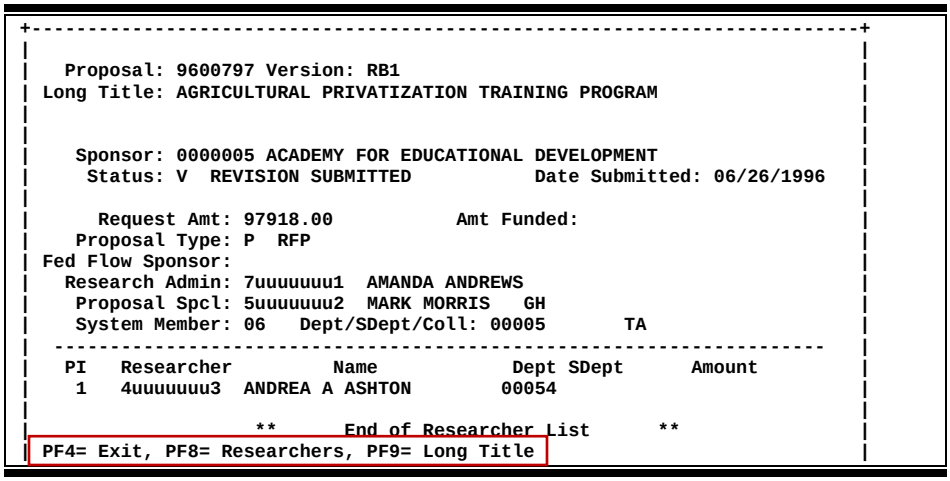


NEXT **Move to the Next Screen**
Pressing this PF key will move you to the next required screen in the proposal process.

RIGHT **Scroll Screen Right**
Some windows are made up of several adjacent panels. These will be designated by the word **Panel: ##** appearing in the window. Pressing this key scrolls the panel to the **right**.

View **View Proposal Summary**

Displays a complete proposal summary.



Glossary

A

ABR

See Automatic Budget Reallocation.

ABR Pool Table
A user-defined table assigning rules for budget pools and the subcode ranges participating in each pool.

Account
A functional unit, identified by an account ID that serves a particular accounting purpose where one person has primary responsibility for it. Accounts include balance sheets (GL) and revenue/expenditure accounts (SL). A building (in the Plant Funds area) is an example of a General Ledger account and the President's Office is an example of a Subsidiary Ledger account.

Account Control
The last four digits in the ten-digit account number for a General Ledger account. The account control designates a specific asset, liability, fund balance, fund addition, fund deduction or summary control.

Account ID
A 6-digit identification number for an account.

Account Number
A 10-position ID within the master file of the Financial Records System. The first 6 positions identify the specific account while the last four positions identify the account control for a balance sheet account (GL) and the object code for a revenue or expenditure account (SL).

Accounts Payable
An application of the Financial Records System (FRS). AP processes vendor payments and keeps track of financial activity involving vendors.

Action/Context Line
The screen line (usually fourth from the top) or lines where the screen to be accessed and the key of the data to be addressed are input and displayed.

Alias
A commonly used name for a vendor, other than the formal customer name (primary name) that prints on the check. The Purchasing System also offers a commodity alias name and permits you to define any number of alias names, once a vendor has been created.

AP
See Accounts Payable.

Attributes
Descriptive data associated with a record. Examples are school, department, function, name and responsible person. Attributes support a variety of sophisticated reporting techniques.

Automatic Budget Reallocation (ABR)
When transactions are entered, a process by which the system automatically transfers budget dollars from predefined budget pools to specific object codes.

B

Bank Transfer

A movement of cash from one bank account to another. This allows expenditures at specific object codes to share in a single pool of money.

Batch Interface
A type of interface where one system generates transactions to be batched for input into another system.

BBA
See Budget Balance Available.

Budget
A plan of revenue and expenditures for an accounting period expressed in monetary terms.

Budget Balance Available (BBA)
That portion of budget funds that is unspent and unencumbered.

Budget Pool
A budget summarized at significant levels of revenue or expense. A single pool of money defined for use by specific object codes.

C

Cash
Coins, currency, checks, and anything else a bank will accept for immediate deposit.

Cash Disbursement
A non-vouchered payment for goods received, services rendered, reduction of debt or purchase of other assets.

Cash Receipt
Cash received from cash sales, collections on accounts receivable and sale of other assets.

Chart of Accounts
A listing, at the 6-digit level, of all account numbers within FAMIS. Sometimes the COA defines the accounts at the 10-digit level as well.

Check Override
The capability to bypass, on an individual-voucher basis, controls that were previously set for all vouchers.

Claim-On-Cash
The share of ownership that an account has in the institution's money.

Clearing Account
A temporary summary account (such as a payroll account) which is periodically set to zero.

COA
See Chart of Accounts.

Compound Journal Entry
A two-sided transaction that posts debits and credits.

Context
The information that identifies the record being displayed or to be displayed by the system.

Credit Memo
The reduction of a payable previously paid or still open. A credit memo may result from overpayment, overbilling, or the return of goods.

Currency Code
A code that identifies a record in the Tax Currency Table. This record provides the factor to calculate foreign currency conversion costs or gains and the liability account used. The code is translated through a table into a conversion rate.

Cycle
Two or more programs that are run in a specific sequence.

D

Data

Data are representations, such as characters, to which meaning might be assigned. They provide information and can be used to control or influence a process. This term is not synonymous with information. Information is data to which meaning has been assigned.

Database
The collected information that is accessible to the computer for processing.

Data Control
The tracking of input, processing and output, and the comparing of actual results to expected results in order to verify accuracy.

Data Element HELP
An on-line feature that assists the user by providing immediate information about any particular field on a screen.

Data Entry
A means for adding information into the system.

Default
The value that the system will assign if no other value is entered.

Delete Flag
A data element whose condition signifies that a document will be permanently removed from the database during the next archive cycle.

Demand Voucher
Voucher to be paid during the next Check Cycle.

Diagnostic Message HELP
An on-line feature that assists the user with data entry by providing an explanation of a message and the appropriate action to take.

Diagnostics
The messages that describe the results of processing. These messages may indicate an error and provide information about a process by noting what action to take to correct the error.

Digit 3 of TC
The third digit of the Transaction Code (Entry Code) which specifies the type of transaction.

Discount Account
The account credited for discounts taken by the system when a check is written.

Discount Table
A table containing user-defined values representing discount terms for vendors.

Dollar Data
A record of the dollar amount and the type of financial transactions posted to an account.

Dollar Limit
A code used in Accounts Payable to specify a check amount. If the amount of a vendor's check is greater than this value, the check will not be generated.

Drop Flag
A data element whose condition signifies that a document is to be removed from the database immediately.

E

Encumbrance
An obligation incurred in the form of a purchase order or contract. Also referred to as an open commitment.

Endowment
Funds received by an institution from a donor who specifies the condition that the principal not be spent.

Endowment Income
The income generated by investing the principal of an Endowment Fund.

Entry Code
The initial three-digit code on a transaction that denotes the transaction type. This code, which is mandatory for all FRS transactions, is predefined by the system. It is also known as the Transaction Code.

F

FA
See Financial Accounting.

Feed
Transactions from other systems that are transferred to the FRS.

Field
That part of a database in which one unique piece of information is stored; OR an area on a screen that allows data entry.

File
A storage area established within a computer system or database for organizing similar kinds if data.

Financial Accounting (FA)
A Financial Records System application that balances the General and Subsidiary ledgers while providing a complete audit trail of all transactions.

Financial Records System (FRS)
A system that supports the financial record-keeping and reporting of a college or university.

Financial Transaction
An entry made to the system to record information.

Flag
A data element used to set controls or conditions on a process or program.

Freeze Flag
A data element whose condition signifies that new transactions cannot be posted. This includes no feeds or invoice postings for this document.

FRS
See Financial Records System.

Fund
An accounting entity (a 6-digit GL account) with a self-balancing set of 10-digit accounts for recording assets, liabilities, a fund balance and changes in the balance.

Fund Balance
The equity of a fund (the difference between assets and liabilities).

Fund Group
A related collection of funds (6-digit GL accounts). Examples include Current Unrestricted, Current Restricted, Loan, Endowment, Annuity and Life Income, Plant, and Agency.

Fund Group ID
A one-digit identification number representing the fund group with which an account is associated.

Fund Transfer
A movement of dollars from one fund balance to another.

G

General Ledger (GL)

A balance sheet account for the institution. All GL account numbers begin with "0" (zero).

GL
See General Ledger.

GL/SL Relationships
User-defined structures relating Subsidiary Ledger (SL) revenue/expense accounts to General Ledger (GL) fund accounts.

Global Subcode Edit (GSE)
A system edit that checks each new 10-digit account against a table that specifies valid combinations of 6-digit accounts and subcodes.

GSE
See Global Subcode Edit.

H

Header

That portion of a Purchasing document containing basic information such as the document's number, the date and amount.

HELP
An online feature which accesses PREDICT in order to supply descriptions, valid values and suggested actions.

I

Indirect Updating

The automatic posting of real dollar activity to a GL Balance Sheet account as a result of a direct transaction.

Inquiry Screen
A screen which only displays information and cannot be used for entering data.

Interface
A communication link between data processing systems or parts of systems that permits sharing of information.

Interfund Borrowing
The transfer of an asset or liability from one fund to another.

J

JCL

See Job Control Language.

Job Control Language (JCL)
A problem-oriented language, used in IBM that expresses the statements of a processing job. It is also used to identify the job or describe its requirements, usually to an operating system.

Journal Entry
A non-cash transfer of dollars between two or more accounts.

L

Ledger

A collection of account records for an organization. FRS contains two ledgers: the GL (balance sheet) and the SL (revenue and expense). See also General Ledger and Subsidiary Ledger.

Liability Account
In AP, a GL account that is credited for the liability when a voucher is processed. Any GL account that accepts a transaction creating a liability.

M

Map Code

A five-digit attribute code in an SL account indicating the GL Fund ID to which it relates.

Memo Bank Account
An account that represents the balances of demand deposits for operating accounts.

Menu
A screen containing a list of available processes, screens or other menus.

N

Name Rotation

A feature that allows users to print a vendor name in one format on checks and then rotate it to another format for sorting on reports.

O

Object Code

A four-digit number identifying specific items of revenue/expense or attribute records.

P

Parameter

A variable that is assigned a constant value for a specific purpose or process. It provides the user with defined choices for report selection, processing or output requirements.

R

Regular Order

A type or purchase order that denotes a typical order.

Remit-To Address
The address to which the check for goods and/or services rendered will be sent.

Requisition
A type of document that internally requests goods and/or services to be acquired. It must be authorized before being converted to a purchase order.

Retention Months
A data element defined when creating a vendor. This indicates the number of months a vendor is to be maintained on file after all outstanding items have been paid or reconciled.

Run Parameter
A parameter from a control record or a program control transaction (as opposed to a file maintenance transaction).

S

Save

The process that creates a budget version.

6-Digit Account
For GL: An entity that consists of a self-balancing set of 10-digit accounts.
For SL: An entity of revenues and/or expenses

Screen HELP
An on-line feature that assists the user with data entry by providing information on the purpose and operation of a particular screen.

Secondary Vendor
The vendor record holding the multiple addresses that are used periodically, as opposed to the primary address.

Session
A control mechanism to track real-time posting of a group of financial transactions is order to provide an audit trail.

SL
See Subsidiary Ledger.

Split Encumbrance
An encumbrance which applies to several accounts.

Standing Order
A type of purchase order used for reoccurring services like those provided by the telephone and electric companies.

Subcode
Four digits appended to the account ID to identify attributes and dollar records within an account.

Subsidiary Ledger
Revenue and expenditure accounts for the institution. All SL account numbers begin with a ledger number of 1 through 9.

Suspense Account
A GL clearing account reflecting real dollar activity directed to the Suspense File.

T

1099 Vendor

A vendor (usually a consultant or professional service hired by an institution) whose payments must be reported to the IRS on Form 1099.

1099 Voucher
A voucher that must be reported to the IRS on Form 1099.

10-Digit Account
The six-digit account ID combined with the four-digit subcode, i.e. an account control or object code.

Tax Code
A code that identifies a record in the PO Tax Table (for the Purchasing System) and in the Tax Currency Table (for Accounts Payable). The code must be the same for both tables. This record contains the tax percentage and the tax liability account to be used.

Tax ID
A Social Security Number or Federal Employer Identification Number that is available for 1099 report preparation.

Taxes
An additional charge on the acquisition of goods that is imposed by the taxing authority and should be paid with the invoice.

Temporary Vendor
A vendor from whom only one purchase or service is required. No further transactions, for this vendor, are expected.

Transaction Code
A three-digit code that uniquely identifies a transaction type and determines editing criteria and dollar fields to be updated.

U

Update Screen

A screen that allows a user to enter data for updating the files.

V

Valid Value

A value of a data element that has been defined for input.

Value-Based
A mechanism used to restrict operator access to information by comparing operator security authorization with the value stored in the field.

Vendor
A provider of goods and/or services.

Vendor Addresses
See Order-From Addresses and Remit-To Addresses.

Vendor Automatic
A feature that automatically assigns a specific Number Assignment to the vendor on the Action/Context Line.

Vendor Commodity
A good or service purchased from a specific vendor.

Vendor File
A record of all attributes, dollar data, and control information for all vendors.

K:\FA\DOC\WRKNPRCS\SPR\Proposals\SPRPropcurr0211.docx