## Working in a Remote World

Overview of systems used for proposal development/award lifecycle



#### **Presenters:**

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





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





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





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



#### Online Resources

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





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





#### Online Resources

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

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





#### Online Resources

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





### Portfolio Management

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



### Reporting and Portfolio Management

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



### Expenditure processing - Payroll

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



### Expenditure processing - Payroll

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

#### Expenditure processing – Non-Payroll

System	Description	How to Request Access	Link for Access	Contact for Support
K2 - Journal Vouchers	K2 workflow for Journal voucher/Cost transfer requests, routes to RFAs for approval	Open Access	K2 JV webpage	Research Finance





Expenditure processing – Non-Payroll

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



### Expenditure processing – Non-Payroll

System	Description	How to Request Access	Link for Access	Contact for Support
SSB (Self-Service Banner)	Purchase Order requisitions (for purchases greater than \$5,000)	Banner Access Request	Banner SSB Page	Research Finance

System	Description	How to Request Access	Link for Access	Contact for Support
Concur	AMEX statement reconciliations and employee reimbursements. Use an AMEX card for purchases less than \$5,000.	Open Access	SAP Concur	Research Finance, Fred Cromp, Stacey Cugini





Expenditure processing – Non- Payroll

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



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





## PRIORITY BA

Link: Priority



## Priority BA System Access Request Form

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

### Priority BA System Access Request Form

#### Application Process Steps

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

#### **Prerequisites**

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

## Priority BA System Access Request Form

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

#### **Important Notices**

#### NOTICE OF CONFIDENTIALITY AND APPROPRIATE USE POLICY

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

Unauthorized access to, use of, reproduction or disclosure of or inappropriate access to such information (in paper format or any system of record to which you have access) supplied by and/or relating the

University and its faculty, staff, students or your own information is prohibited. The University reserves the right to change the Appropriate Use Policy or any portion of the policy, at any time, without prior notice. Changes to the policy are effective upon posting at www.northeastern.edu/policies, where the most current version resides.

#### NOTICE OF REQUIREMENT TO MAINTAIN CONFIDENTIALITY

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

#### NOTICE OF ACCOUNTHOLDER and MANAGER RESPONSIBILITY

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

## Priority BA System Access Request Form

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

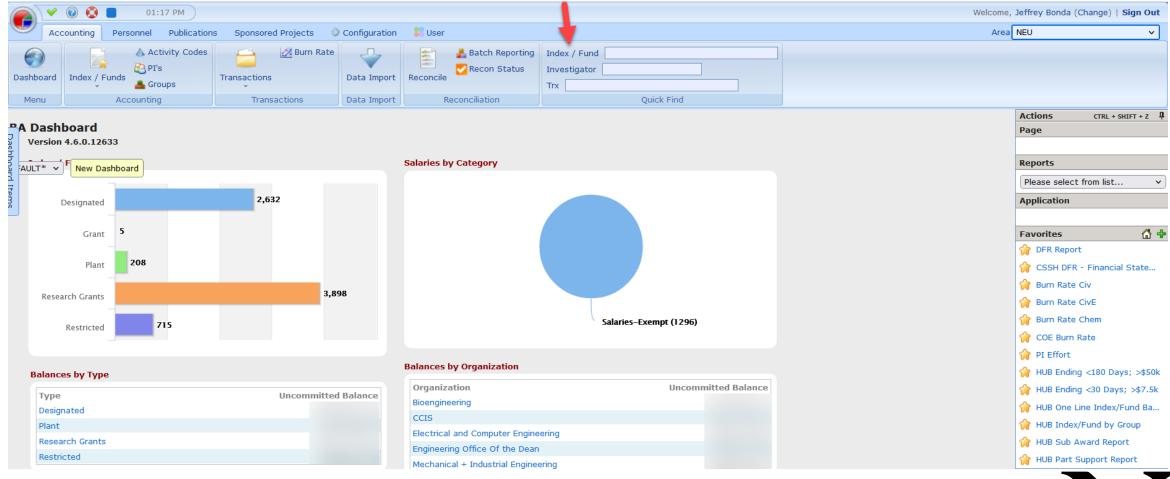
#### Part 1: Requestor Information

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Iniversity Role:	Faculty	Primary Investigator	Staff	Student	Other
rt 2: Reques	t Information				•
Request Date:	mm/dd/yyyy				
Request Type:	Report Viewer	Report Author	Other		
agree to all ten	ms and conditions	listed above under Impor	tant Notices:	mm/d	id/yyyy
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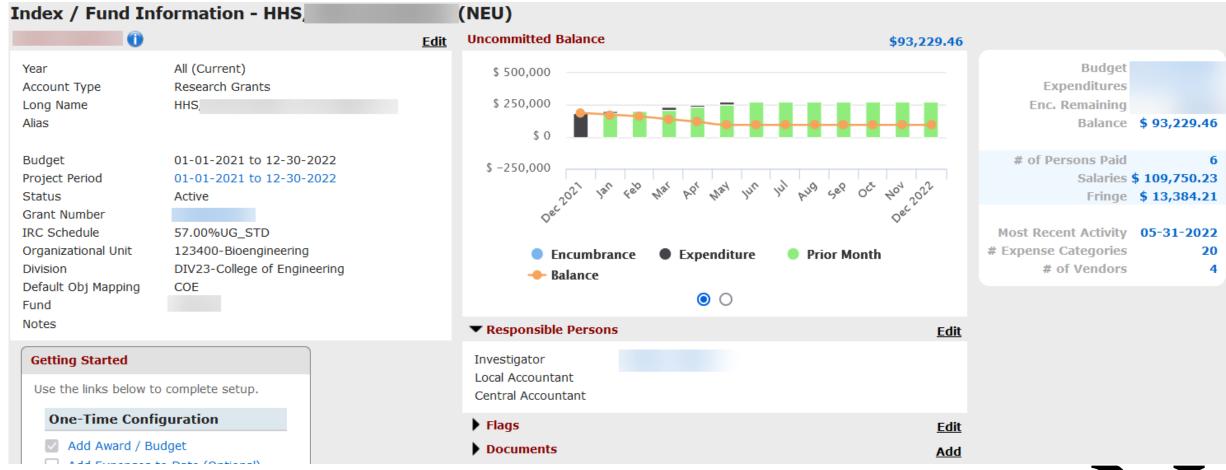


## Priority BA System - Dashboard



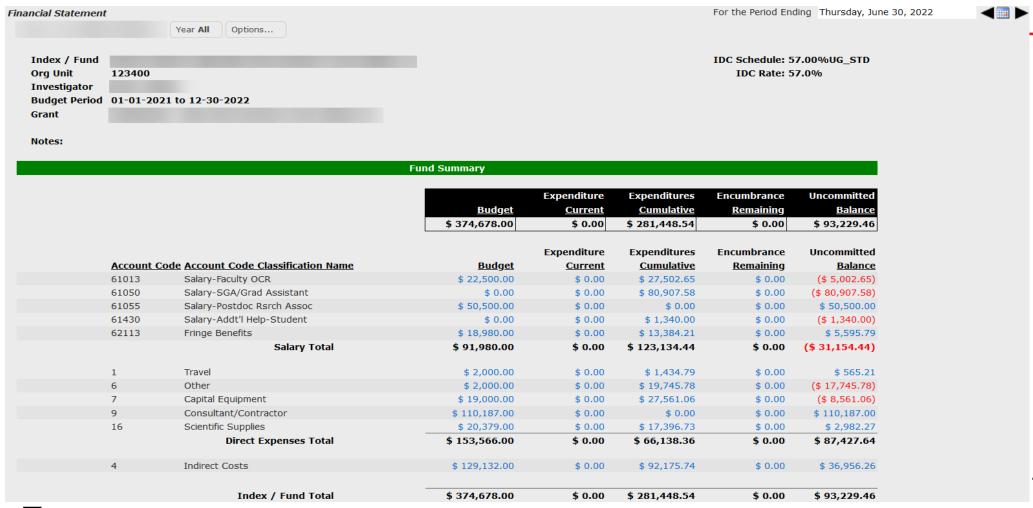


## Priority BA System – Index/Fund Page





## Priority BA System – Index/Fund Page







Questions?



## Thank You!

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