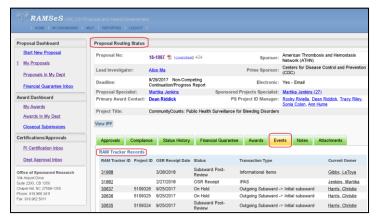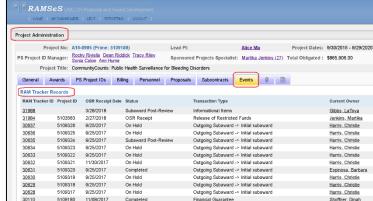# RAMSeS Enhancement v.3.08

Effective: May 22, 2018

RAM Tracker Transparency Guide

Research Award Management (RAM) Tracker was created to assist OSR staff and leadership with day-to-day management of proposal and award transactions, providing real-time visibility into the status of transactions as they make their way through OSR. The RAM Tracker transparency feature enables individuals with access to proposals and/or awards in RAMSeS to view key RAM Tracker information via the Events tab on the Proposal Routing Status and Project Administration screens, as outlined below.

RAM Tracker Records listing

- Displayed via Events tab on the Proposal Routing Status screen and the Project Administration screens.
- Visible to anyone with access to the Proposal and/or the Award - contact the Backbone Role Manager to request access.
- List displays RAM Tracker ID, Project ID, OSR Receipt Date, Status, Transaction Type, Current Owner.
- RAM Tracker records are listed in reverse chronological order (newest at top).
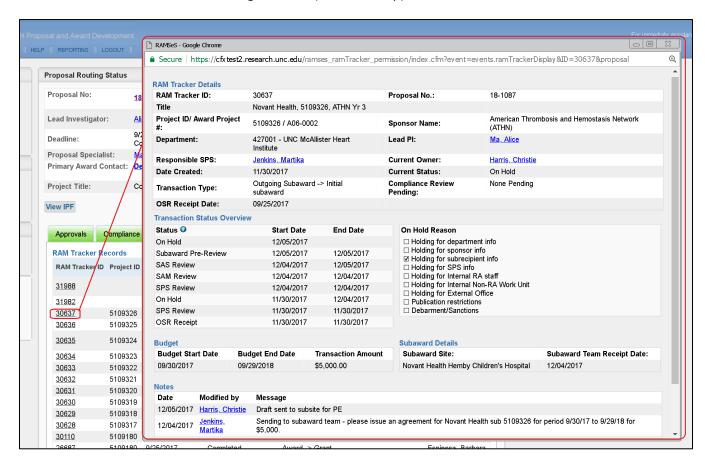

RAM Tracker Record pop up

- The pop up for a particular RAM Tracker record may be accessed by clicking the RAM Tracker ID hyperlink from the RAM Tracker Records listing
- Information contained via the pop up includes:
    → RAM Tracker Details: RAM Tracker ID and Title, Project ID/Project #/Proposal # (as appropriate), Sponsor name, Department, Lead PI, Responsible SPS, Current Owner, Date Created, Current Status, Transaction Type, Compliance Review Pending, OSR Receipt Date
    → Transaction Status Overview: Log of status history including start and end dates for each status and a checklist of "In Process Activities" or "On Hold Reason" (as appropriate). List of Transaction Status definitions included as follows:
        ➢ **OSR Receipt**: A pending award or award-related action has been created and is being assigned to a Sponsored Project Specialist for review.
        ➢ **SPS Review**: A pending award or award-related action is currently under review by a Sponsored Project Specialist.
        ➢ **Review**: A pending award or award-related action is currently under review by a Research Administration Manager.
        ➢ **SAM Review**: A pending subaward action is currently under review by a Subaward Manager.
        ➢ **SAS Review**: A pending subaward action has been assigned to a Subaward Specialist by a Subaward Manager for creation or correction.
        ➢ **Subaward Pre-Review**: A pending subaward action is under review by a Subaward Specialist and being drafted.

➢ **Negotiation**: A pending award or award-related action is currently under negotiation between OSR and internal and/or external parties.

➢ **On Hold**: A pending award or award-related action is currently on hold pending action and/or information by/from a non-OSR Research Administration party and the Sponsored Project Specialist can do no additional work until that is resolved.

➢ **Subaward Post-Review**: A partially executed subaward action is under review by a Subaward Specialist and being prepared for final execution.

➢ **Sent to Data Management**: A pending award or award-related action has been fully processed by a OSR Research Administration staff member and has been sent to the OSR Data Management team for final processing.

➢ **Completed**: A pending award, award-related, or subaward action has been fully processed by all work units within OSR.

→ Budget: Budget start and end dates and Transaction Amount; Subaward Site/Team Receipt Date

→ Notes: List of RAM Tracker notes, including date of note, author of note, and message. Notes are listed in reverse chronological order (newest at top).

Proposal Routing Status screen, Events tab

- The Proposal Routing Status screen is displayed for all post-submission statuses (i.e., it is not displayed for Unsubmitted or Reopened proposals).
- RAM Tracker records are displayed via the Events tab for all proposals in statuses other than Dept Approval in Process, Not Funded, and Withdrawn.
- RAM Tracker records are listed via the Proposal Routing Status screen if the proposal number is referenced in the RAM Tracker record.

- Anyone with access to the proposal may view the Events tab, including the proposal Owner, proposal personnel, the proposal's Primary Award Contact (designated via the IPF General Info screen), and those assigned the role in Backbone of IPF Approver or Proposal Data Access for the proposal's administering or approving departments.
- Non-Admins, Read-Only Admins, and Admins all see the RAM Tracker transparency/campus view via the Proposal Routing Status screen Events tab.
- **NOTE**: Admins see the usual Admin/RAM Tracker listing via the Proposal Administration Events tab. (The Proposal Admin Events tab is not displayed for non-Admins or Read-Only Admins).

Project Administration screen, Events tab

- The Project Administration screen is available to anyone with access to the project's award(s), including award personnel, the Primary Award Contact, and those assigned the role in Backbone of PS Project ID Manager or Award Data Access for administering or approving departments. (**NOTE**: Individuals with access to a proposal do not automatically have access to its associated awards).
- RAM Tracker records are displayed via the Project Admin Events tab up until the project end date has passed and the final financial report has been submitted.
- Non-Admins and Read-Only Admins see the RAM Tracker transparency view, and Admins see the usual Admin/RAM Tracker listing via the Project Admin Events tab.

RAM Tracker attachments – via Proposal Routing Status screen, Attachments tab (non-Admins, Read-Only Admins, Admins)

- Documents uploaded to proposal RAM Tracker records may be viewed by non-Admins, Read-Only Admins, and Admins via the Proposal Routing Status screen, Attachments tab. Non-Admins and Read-Only Admins see "All Parties" access documents only. Admins see both "All Parties" and "Admin Only" access documents.
- Proposal RAM Tracker attachments are grouped by RAM Tracker ID# in descending order (newest RAM Tracker records at the top). Multiple attachments uploaded to a given RAM Tracker record are listed in descending order (most recently uploaded attachments at the top).

RAM Tracker attachments – via Proposal Admin screen, Attachments tab (Admins, Read-Only Admins)

- Documents uploaded to proposal RAM Tracker records may be viewed via Proposal Admin, Attachments tab by Admins and Read-Only Admins. Read-Only Admins see "All Parties" access documents only. Admins see both "All Parties" and "Admin Only" access documents.
- Proposal RAM Tracker attachments are grouped by RAM Tracker ID# in descending order (newest RAM Tracker records at the top). Multiple attachments uploaded to a given RAM Tracker record are listed in descending order (most recently uploaded attachments at the top).

RAM Tracker attachments – via Project Administration, Attachments tab

- Documents uploaded to RAM Tracker records may be viewed via Project Administration, Attachments tab by non-Admins, Read-Only Admins, and Admins. The Project Attachments tab is a "master" list of all documents uploaded across all areas – as such, both proposal and project RAM Tracker attachments may be viewed. **NOTE**: For projects with multiple proposals, RAM Tracker attachments for all proposals are displayed via the Project Events tab.
- Only RAM Tracker attachments designated with "All Parties" access may be viewed by campus/non-Admins and Read-Only Admins.

RAM Tracker attachments are grouped by RAM Tracker ID# in descending order (newest RAM Tracker records at the top). Multiple attachments uploaded to a given RAM Tracker record are listed in descending order (most recently uploaded attachments at the top).
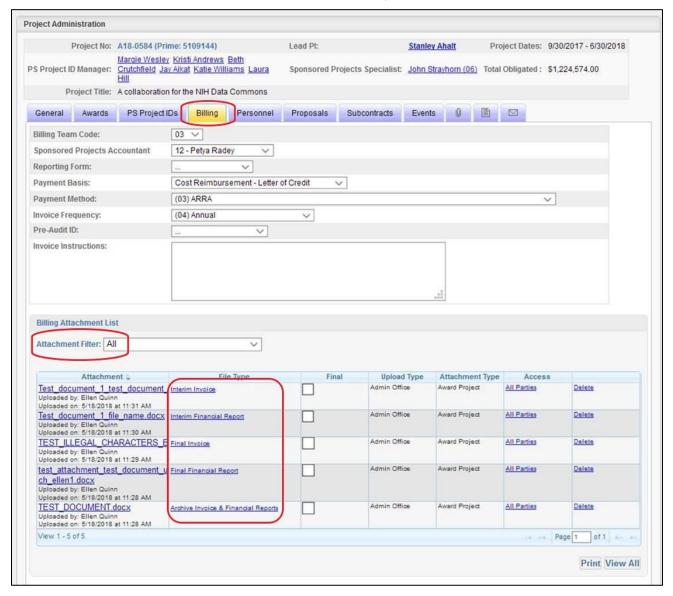
RAMSeS Billing Tab Attachment Guide

Financial Reports and Invoices from Fiscal Year 2017 to May 21st, 2018 will now be available under the attachment type 'Archive Invoice & Financial Reports' in the RAMSeS Billing Tab for each project. All Financial Reports and Invoices from May 22nd, 2018 onward that have been sent to the sponsor will be available in the Billing Tab under Attachments as 'Interim Invoice', 'Final Invoice', 'Interim Financial Report' or 'Final Financial Report'. You may also access these attachments via the Attachments Tab for all projects. For any questions concerning billing, please contact your Sponsored Projects Accountant or OSRBIlling@unc.edu.

Accessing Financial Reports and Invoices via Billing Tab

- Log on to RAMSeS and search for the PS Project ID
- Select the Billing tab
- This will display the new Billing Attachment List, which contains all uploaded financial reports and invoices for that project
- You can filter by File Type

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Accessing Financial Reports and Invoices via Attachments Tab

- Log on to RAMSeS and search for the PS Project ID
- Select the paperclip icon, which is the attachment tab
- This will show all uploaded documents for that project
- To search for financial reports and invoices, filter by File Type

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