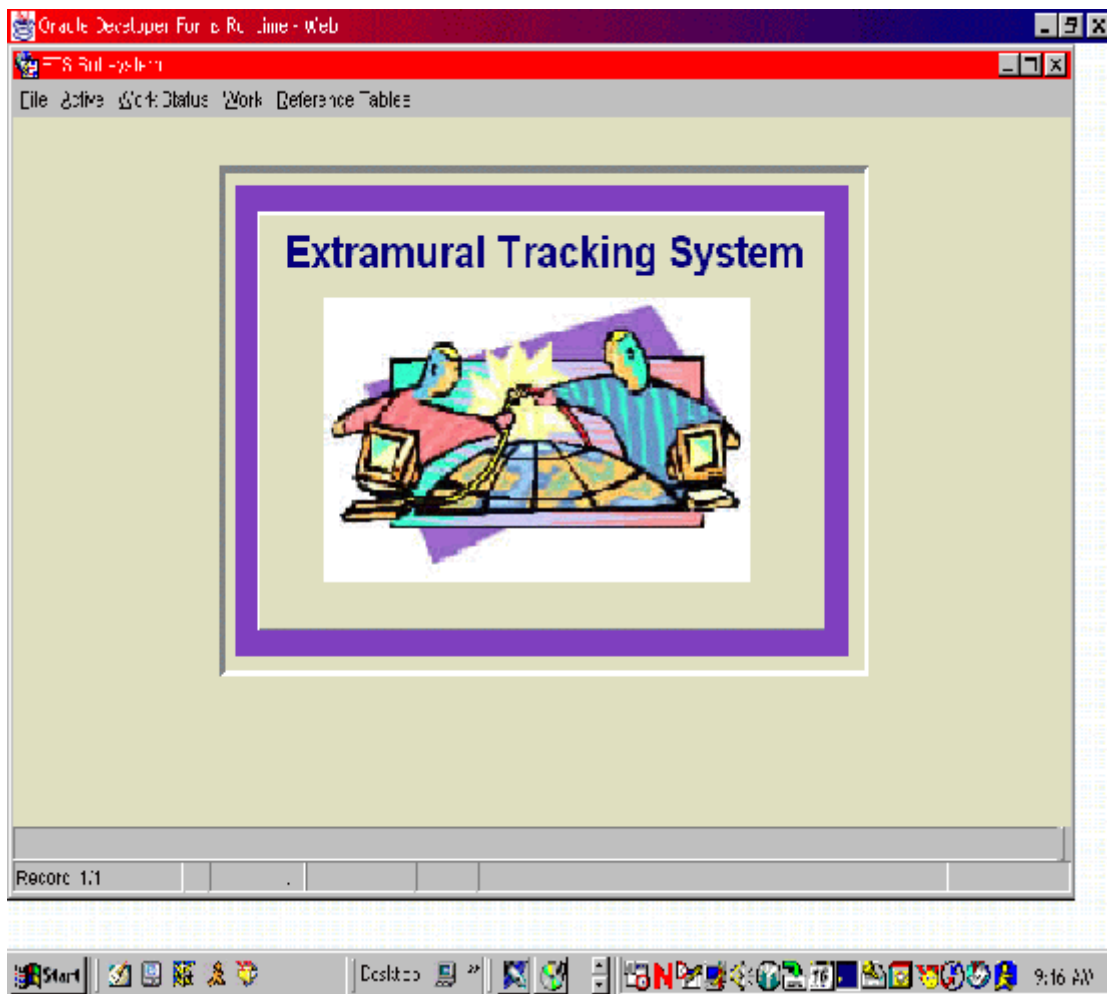


# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS



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# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

## **Introduction**

The Extramural Tracking System (ETS) is the Agricultural Research Services' (ARS) agreements management database which is a component of the Agricultural Research Information System (ARIS). This is considered the first of several stages of development for the system. In this stage , ETS (1) provides information to the Department for Federal Assistance Award Data System (FAADS) reporting purposes, (2) produces the Extramural Agreement award document and achieves uniformity in the look and structure of ARS Extramural Agreements Awards, and (3) provides a centralized database for tracking all Extramural Agreement activity in the agency.

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

## Acronyms and Definitions

### Active File:

The Active File holds all records in ETS that are released from the Work File. This includes the original agreement information and all amendments. To query the information in the Active File, click on “Active” then “ETS” from the toolbar. You can not modify, add, or delete records in the Active File.

### Agreement Types:

ATCA	Assistance Type Cooperative Agreement
GCA	General Cooperative Agreement
MMOU	Master Memorandum of Understanding
NFCA	Non Funded Cooperative Agreement
PG	Project Grant
RCA	Reimbursable Cooperative Agreement
RSA	Research Support Agreement
SCA	Specific Cooperative Agreement
STCA	Standard Cooperative Agreement
TFCA	Trust Fund Cooperative Agreement

**ADO** Authorized Departmental Officer - An individual granted a written delegation of authority by the Administrator of ARS to commit funds, negotiate, enter into, administer, and closeout agreements.

### ADODR

Authorized Departmental Officer’s Designated Representative - An individual who is granted a written limited delegation of authority from the ADO to represent him/her in the administration of agreements. The ADODR provides ongoing administrative and program oversight of activities that occur under the agreement and provides scientific or technical direction to the cooperator on behalf of ARS.

### Advanced Payment Authorized

Approval of payment before the services were performed.

### Control numbers

When adding a new agreement in ETS, the control number is automatically generated once the agreement information is entered on the “Agreements” tab and you move to the “Agy/ADODR/Finance” tab. This number can be used to query the system and it is suggested that you record it in your agreement file for future use.

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

## **EFT**

Electronic Funds Transfer - electronic transfer of funds to recipients' bank account.

## **ETS**

Extramural Tracking System

## **HHS/PMS**

Health and Human Services/Payment Management System - a method of receiving payment by electronic draw down.

## **Pre-award Costs Authorized**

The authorization for the Recipient or Cooperator to incur costs prior to the effective date of the agreement. These are unallowable costs without prior approval.

## **Release a Record**

To move a record from the Work File to the Active File. The process is completed overnight.

## **Treasury Check**

A method of receiving payment by paper check from the U.S. Treasury.

## **Work File**

The Work File holds all records in ETS until they are approved and released to the Active File. This includes new agreements, amendments, and corrections. To query the information in the Work File, click on "Work" then "ETS" from the toolbar. Modification, additions, and deletions are made in the Work File (see instructions to create amendments and/or corrections).

## **Work Status**

The Work Status is a "view only" list of records that are currently in the Work File and those records that have been released from the Work File but do not yet appear in the Active File. Once approved, a check mark will appear in the approved column. If there are numerous records in the "Work status," you can search for a particular record by clicking on "Query" from the toolbar.

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

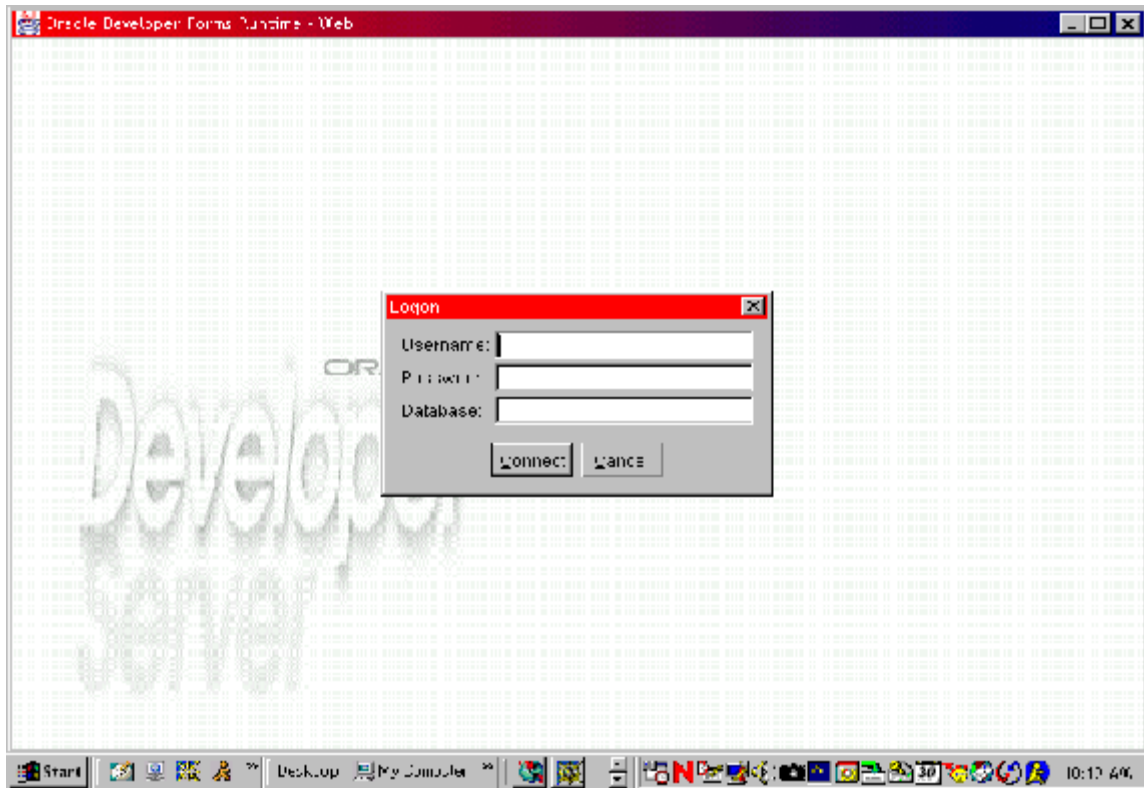


Figure 1; User Logon Screen

- Enter your username:
- Enter your password:
- Enter the database: (ARIS)
- Click the "Connect" button

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

## Add a New Agreement

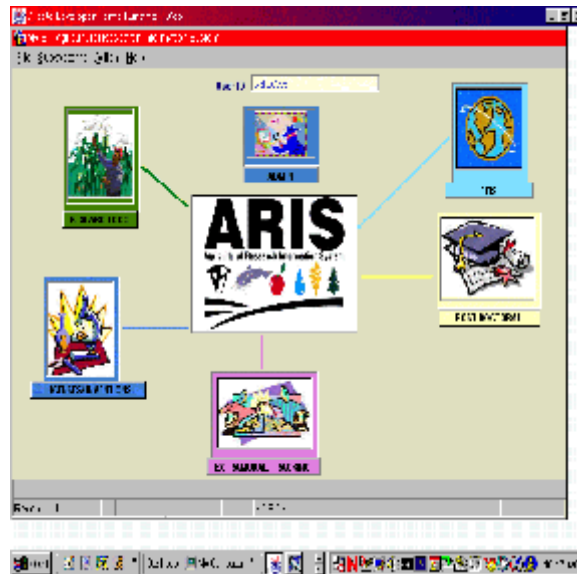


Figure 2; ARIS Welcome Screen

- Click the “Extramural Tracking” Icon

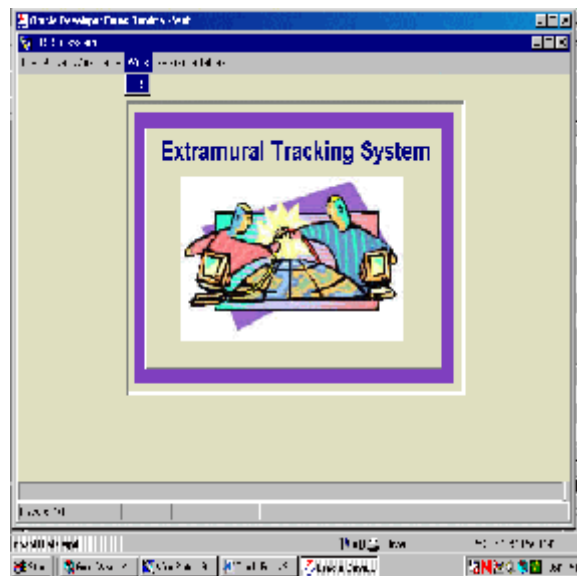


Figure 3; ETS Subsystem Screen

- Select “Work” then “ETS” from the tool bar.

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

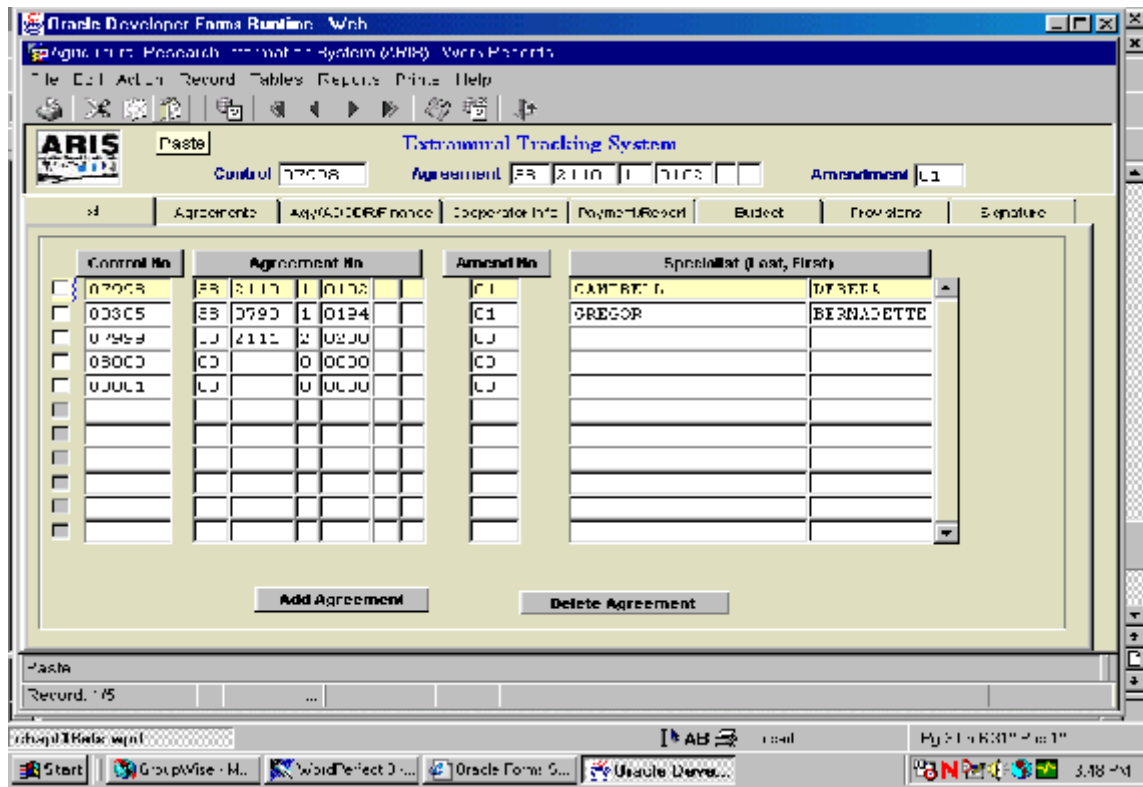


Figure 4; ARIS Work Records (List tab)

- Click on "Add Agreement" at the bottom of the screen.



## EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

The screenshot shows the ARIS Extramural Tracking System (ETS) interface. The window title is "Oracle Developer Forms RunTime - Web". The browser address bar shows "http://arisa.ccr.oregon.gov/ARIS/WorkRecords". The main menu includes File, Edit, Action, Record, Records, Prints, and Help. The ARIS logo is in the top left. The page title is "Extramural Tracking System". Below the title are input fields for "Control" (J0190), "Agreement" (58 0101 3 123F), and "Amendment" (00). A navigation bar contains tabs: List, Agreements, Agy/ADODR/Finance, Cooperation, Payment/Receipt, Budget, How/Signs, and Signature. The "Agreements" tab is active. The form fields are: Agreement No. (58 0101 3 123F), Amend No. (00), Type of Agreement (Project Grant), Specialist (Name: DEBROOK DEPRADETTE), Project No. (0100 0002 001 00 00), Authority (7 0000 0010a), Title (SYSTEMSIBILITY OF NORTH AMERICAN POTATO CULTIVARS TO TOMBURY SCORR AND POTATO TOP-TOF VIRUS: FIELD AND STORAGE CONDITIONS), Period of Agreement (Start Date: 01/01/2001, Term Date: 05/01/2004, Duration (Months): 12), Prior Obligation (\$0.00), Change in Obligation (\$53,132.00), Total (\$53,132.00), and Comments (empty). The bottom status bar shows "Record: 01" and "Lib: cr/valu...". The Windows taskbar at the bottom shows the Start button, Desktop, and various application icons, with the system clock at 9:44 AM.

Figure 5; ARIS Work Records (Agreements tab)

- Enter the following Information:
  - (a) **Agreement number** (Alpha characters should be entered at the end of the agreement number. For example agreement No. 58-0101-3-F123 should be entered in ETS as 58-0101-3-123F. Other Examples (NFCA 58-0101-3-123N, MMOU 58-0101-3-123MM, MOU 58-0101-3-123M)
  - (b) **Type of Agreement:** (1) click on "?", (2) select agreement type, (3) click "ok".
  - (c) **Specialist:** (1) click on "?", (2) select a specialist, (3) click "ok".
  - (d) **Project number (CRIS):** (1) click on "?", (2) in the "find" box, enter the the project no. after the %, *do not input hyphens* (3) click "find", (4) highlight appropriate number from the list, (5) click "ok".
  - (e) **Type Comments** (if applicable)
  
- Proceed by clicking on "Agy/ADODR/Finance" tab at the top of the screen.

**Note: No data entry is required in the remaining fields on this screen.**

## EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

Oracle Developer Forms Runtime - Web  
ARIS Extramural Tracking System  
Control: JUL197 Agreement: Amendment: 00  
List Agreement Agency/ADODR/Finance Cooperator Info Payment/Receipt Budget Provisions  
Agency  
Agency: ORNL, REE, ARS, AFY, E&D Contract (last, first): WELBORN JR CURTIS  
Address: 5601 SUNNYSIDE AVE., RB 5110  
Room 3-2165  
City: LETTSVILLE State: SD Postal Code: 5070 Country: US  
ARS ADODR  
Name (Last, first, MI, Suffix):  
Address:  
City: State: Postal Code: Country:  
Agency Finance Office  
Office Name: INST. DEV. ARS, AFY, FOR  
Address: 5601 SUNNYSIDE AVE., RB 5110  
Room 3-2206  
City: LETTSVILLE State: SD Postal Code: 5070 Country: US  
Form 40400 Transact Record: 1

Figure 6; ARIS Work Records (Agency/ADODR/Finance tab)

- Enter the ARS ADODR Information:
  - (a) **Name:** (1) click on "?", (2) in the "find" box, enter the % then the ADODR's last name, (3) click "find", (4) highlight the appropriate name from the list, (5) click "ok".
  - (b) **ADODR address information**
- Proceed by clicking on "Cooperator Info" tab at the top of the screen.

**Note:** Agency and Finance Office information will default for your Area, data can be modified if changes are necessary.

## EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

The screenshot shows the ARIS Extramural Tracking System (ETS) web interface. The browser window title is "Oracle Developer Forms Runtime - Web". The page header includes "ARIS Extramural Tracking System" and navigation tabs: "List", "Agreements", "App/JOB/Finance", "Cooperator Info", "Payment/Report", "Budget", "Provisions", and "Signature". The "Cooperator Info" tab is active. The form contains the following fields:

- Type Perf Org: 1862 Ford Grant College
- Cooperator / Sponsor / Recipient:
  - Recipient Code: 10256F
  - Name: UNIVERSITY OF MAINE
  - Address: Office of Research and Sponsored Programs, 5717 Corbett Hall
  - City: BRONO, State: ME, Postal Code: 04473, Country: USA
- Cooperator / Sponsor / Recipient Designated Representative:
  - Name (Last, First, MI, Suffix): CROCK, ZENKETA, JR
  - Address: University of Maine, Dept. Biological Sciences, 50 Houlton Rd
  - City: THORNTON, State: ME, Postal Code: 04760, Country: USA

The bottom of the screen shows a Windows taskbar with the Start button, several application icons, and a system tray displaying "Desktop" and "9:45 AM".

Figure 7; ARIS Work Records (Cooperator Info tab)

- Enter the following information:
  - (a) **Type of Performing Organization:** (1) click on "?", (2) select organization type, (3) click "ok".
  - (b) **Cooperator/ Sponsor/ Recipient:** (1) click on "?", (2) in the "find" box, enter % then the name, (3) click "find", (4) highlight the appropriate city name from the list, (5) click "ok".
    - Street address information must be entered
  - (c) **Cooperator/ Sponsor/ Recipient Designated Representative Information**
- Proceed by clicking on "Payment/Report" tab at the top of the screen.

**Note: If Cooperator information is not found, please contact EAD at 301-504-1142.**

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

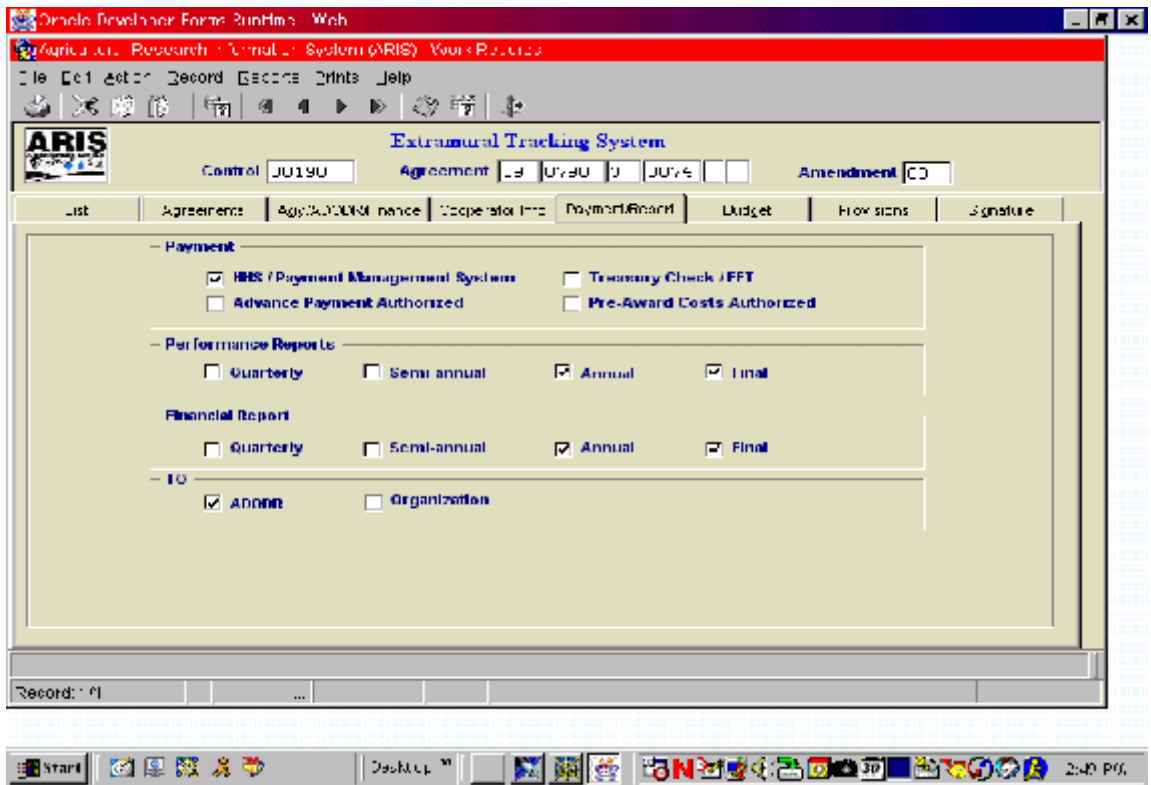


Figure 8; ARIS Work Records (Payment/ Report tab)

- Mark the boxes in the following fields as appropriate:
  - , Payment
  - , Performance Reports
  - , Financial Report
  - , TO
- Proceed by clicking on "Budget" tab at the top of the screen.

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

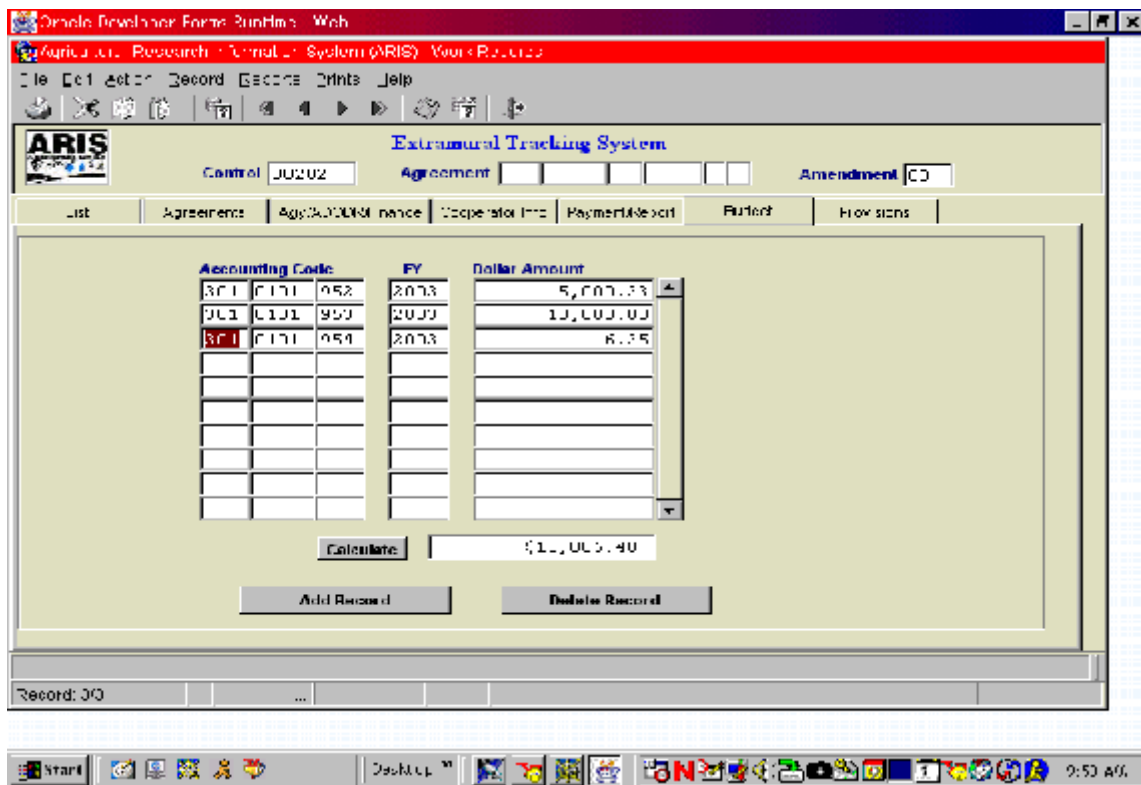


Figure 9; ARIS Work Records (Budget tab)

- Enter the Accounting Code, FY, and Dollar Amount.
- Add additional lines of funding by clicking on “Add Record” at the bottom of the screen (the cursor will move to the next line).
- Click on “Calculate” to complete the budget screen.
- Proceed by clicking on “Provisions” tab at the top of the screen.

**Note:** The total funding amount will propagate to the “Agreements” screen (Figure 5) and will appear in the *Change in Obligation* and *Total* fields.

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

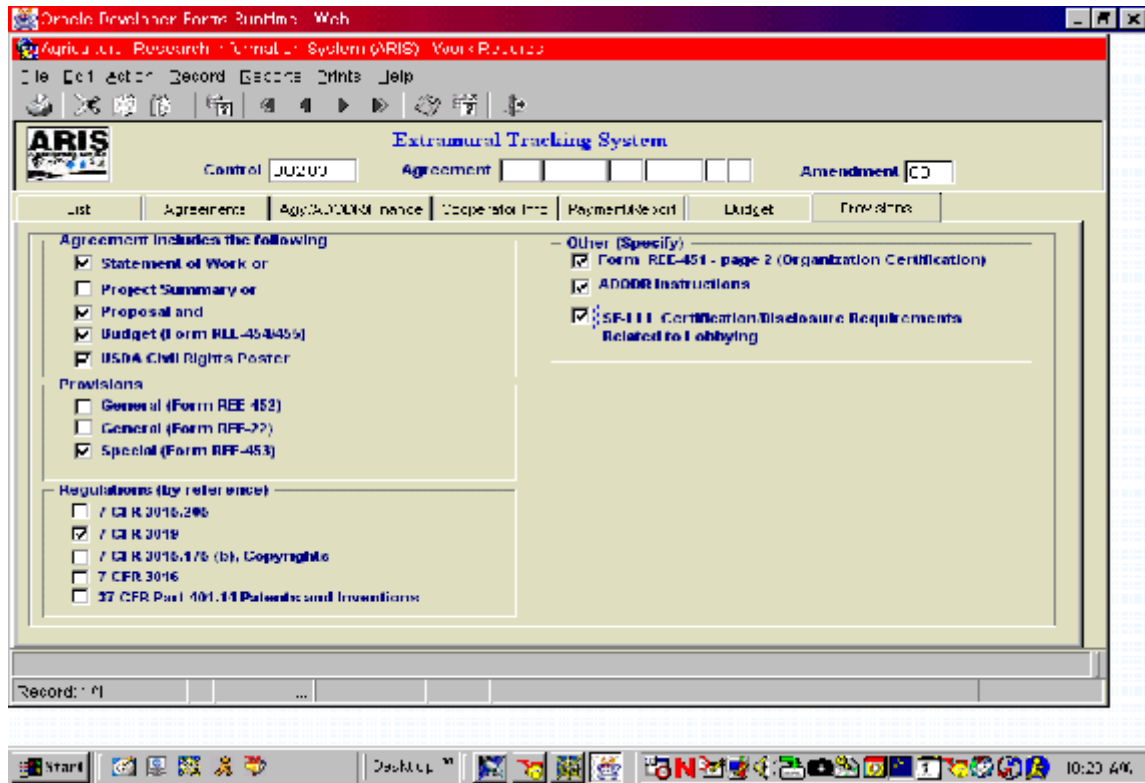


Figure 10; ARIS Work Records (Provisions tab)

**Note:** The boxes will appear checked on this screen as appropriate for the agreement type previously chosen on the “Agreements” screen (Figure 5). Boxes may be modified if changes are necessary.

- Check “SF-LLL Certification/Disclosure Requirements Related to Lobbying” if your award is \$100,000.00 or more.
- Proceed by clicking on “List ” tab at the top of the screen.

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

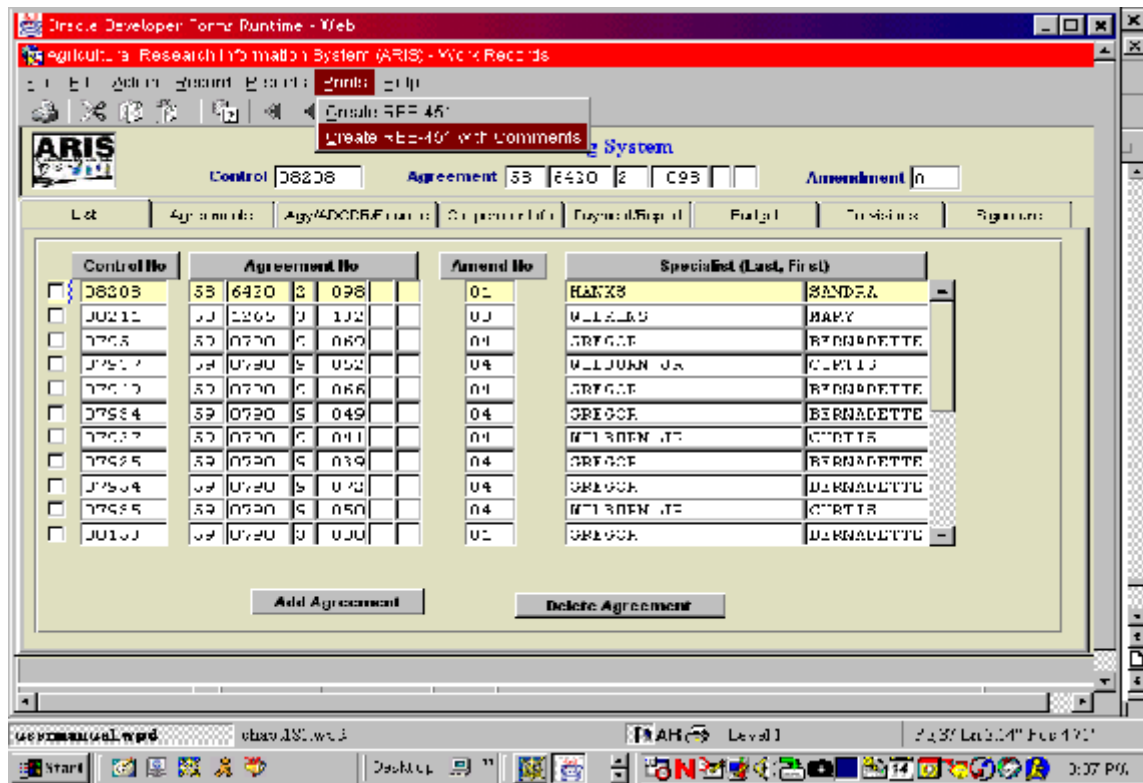


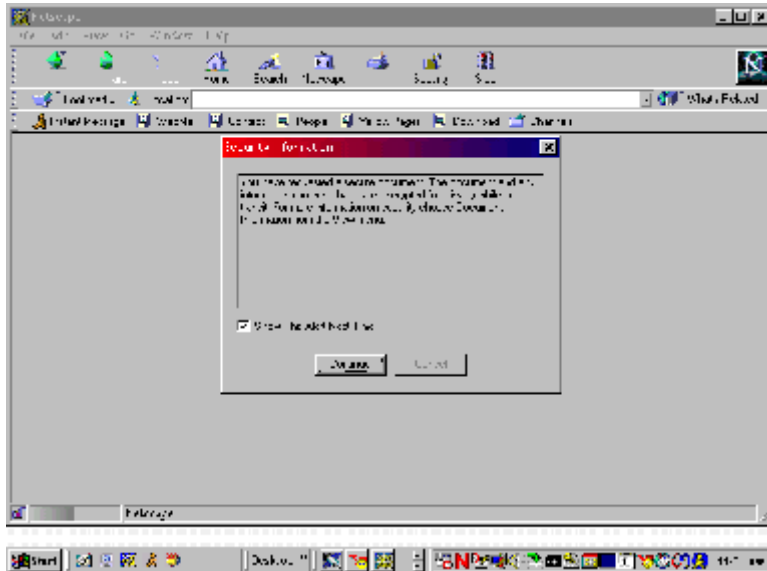
Figure 11; ARIS Work Records (List tab)

**Note:** The new agreement will now be listed on this screen.

- Locate the new agreement from the list and check the box to its left.
- Select "Prints" from the tool bar.
- Select either "Create REE-451" or "Create REE-451 with Comments".

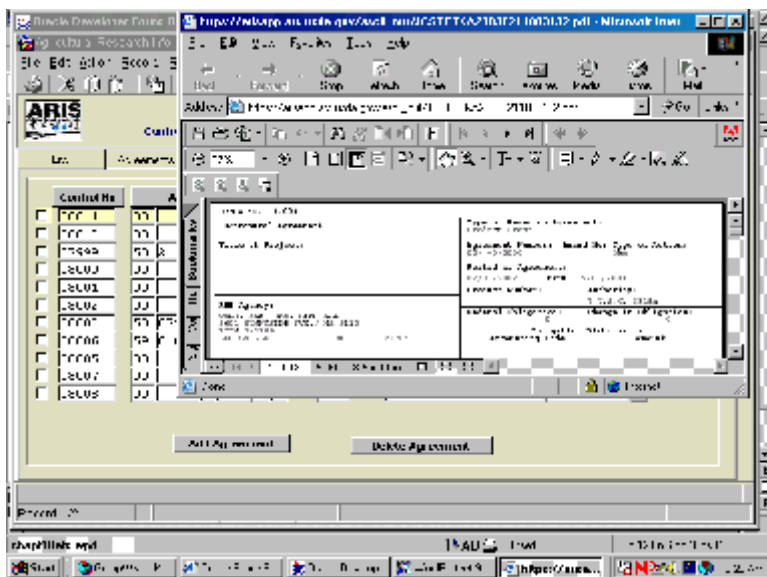
**Note:** Comments will print as an attachment to the REE-451.

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS



**Note: Figure 12; (Security Information Screen) may appear, if so, click “continue” and Adobe Acrobat will automatically create and display the print file (Figure 13). Some systems may skip the Security Information Screen.**

Figure 12; Security Information Screen



- Review the REE-451 for completeness and accuracy of the information.
- Close the Adobe file in order to complete the *Official REE-451*. You will be returned to the List screen (Figure 11).
- Locate the new agreement from the list and check the box to its left.
- Proceed by clicking on “Signature” tab at the top of the screen.

Figure 13; Unofficial Copy (review only) REE-451 (Adobe Acrobat)



## EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

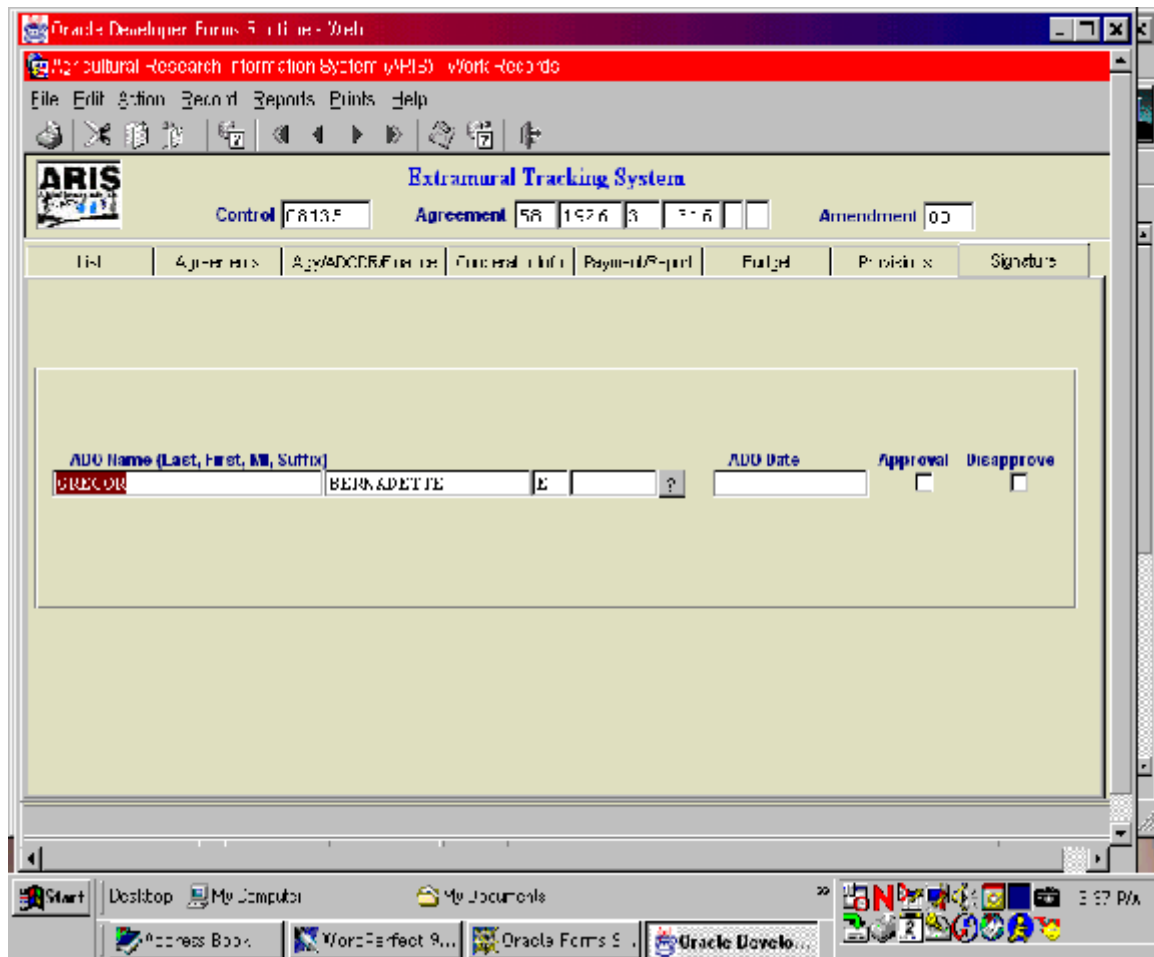


Figure 14; ARIS Work Records (Signature tab)

- Enter the ADO Signature Information:
  - (a) **ADO Name:** (1) click on "?", (2) in the "find" box, enter the % then the ADO's last name, (3) click "find" or highlight the appropriate name from the list, (4) click "ok".
  - (b) ADO date (**do not enter**)
  - (c) Approved/Disapproved (**do not enter**)
- Click on "List" tab at the top of the screen to save the record. The "Save Prompt" will appear, click "yes".
- See Printing Instructions.

**Note: ADO name will print on the REE-451. ADO date and approval/disapproval will be entered upon receipt and acceptance of the award documentation (see Release instructions).**

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

## Create an Amendment

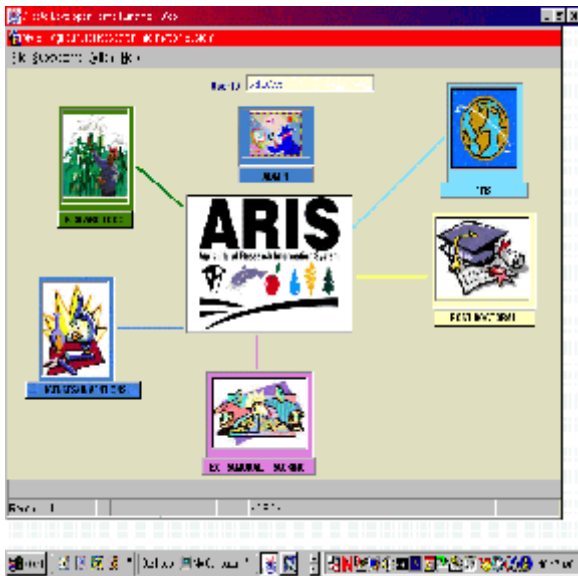


Figure 1; ARIS Welcome Screen

- Click the "Extramural Tracking" Icon

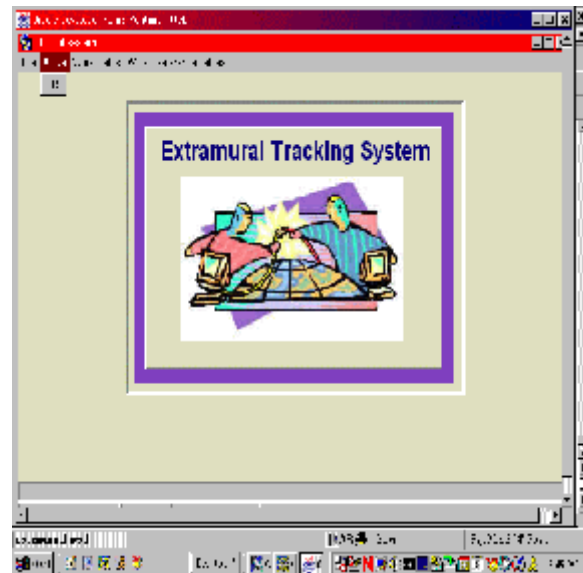


Figure 2; ETS Subsystem Screen

- Select "Active" then "ETS" from the tool bar.

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

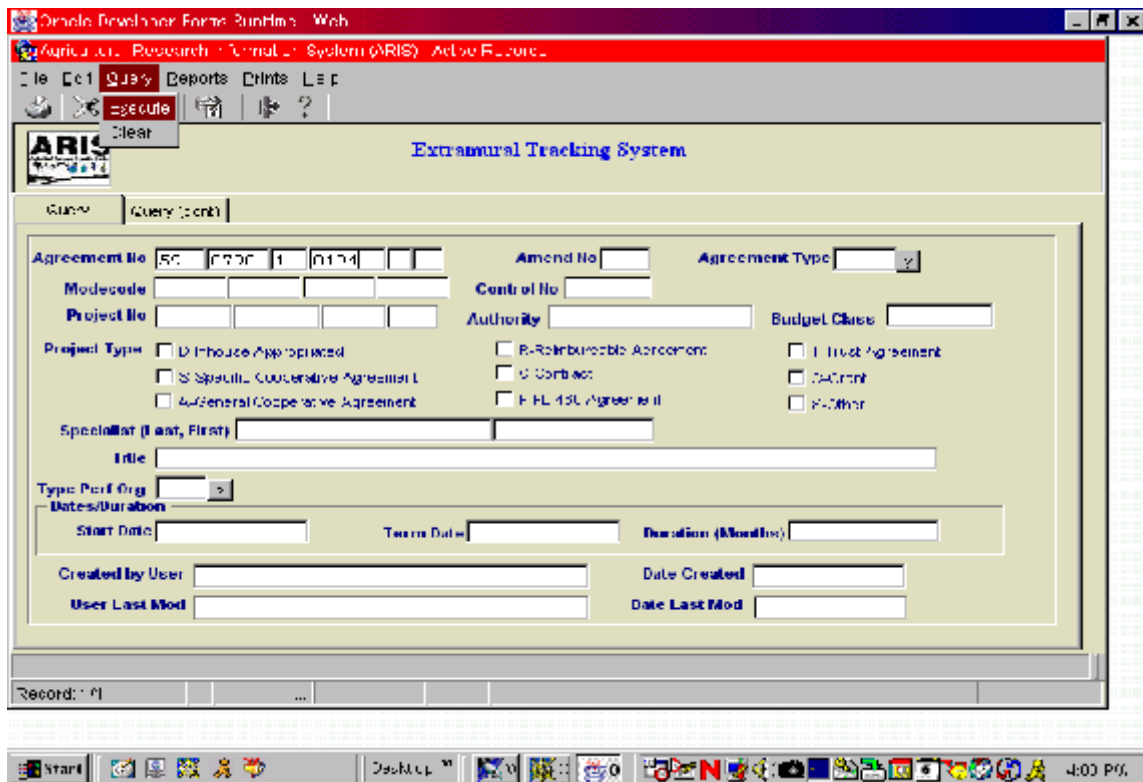


Figure 3; ARIS Active Records (Query tab)

- Enter the search criteria in any of the fields on the Query Screen to retrieve the agreement to be amended, for example: Agreement No., Control No., Project No., etc.
- Select “Query” then “Execute” from the tool bar or press “Enter”.

## EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

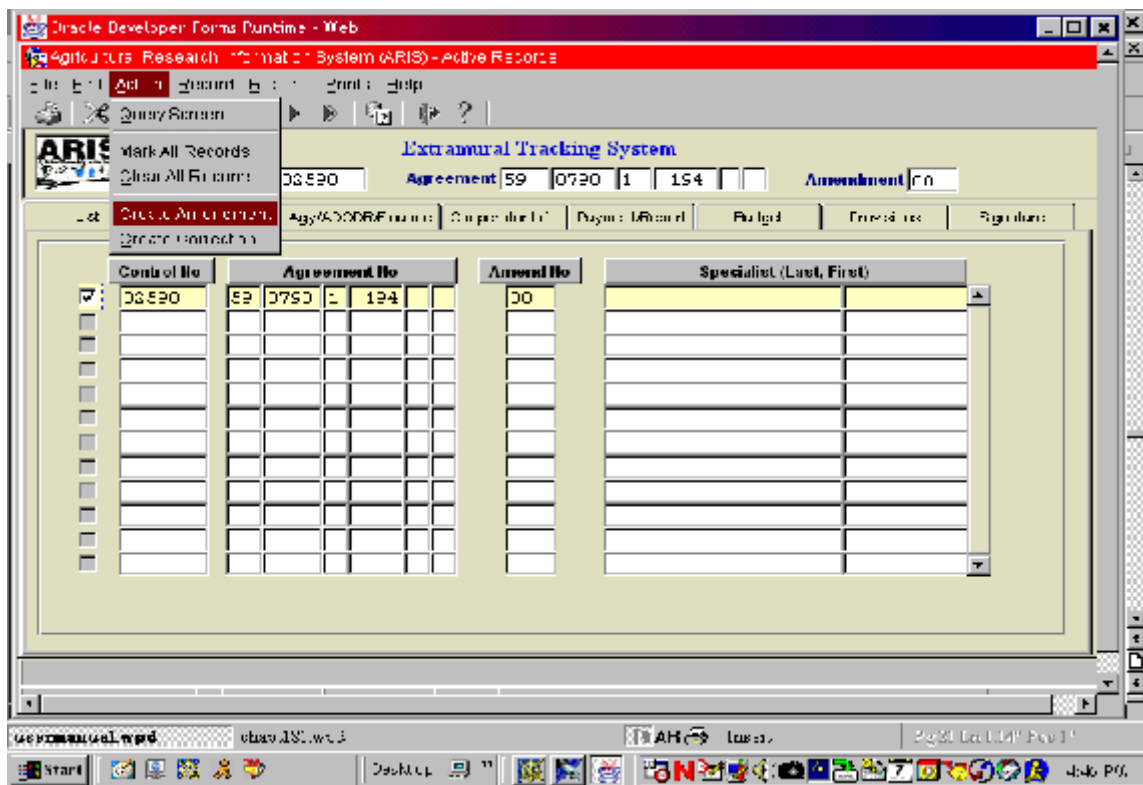


Figure 4; ARIS Active Records (List tab)

- Mark the box to the left of the project that requires the amendment.
- Select "Action" then "Create Amendment" from the toolbar. Click "yes" at the "Do you want to continue . . ." prompt. Next the "Marked record processing is complete" prompt will display, click "ok".
- Select "File" then "Exit" to leave the Active File and proceed with data entry on the Work File.

## EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

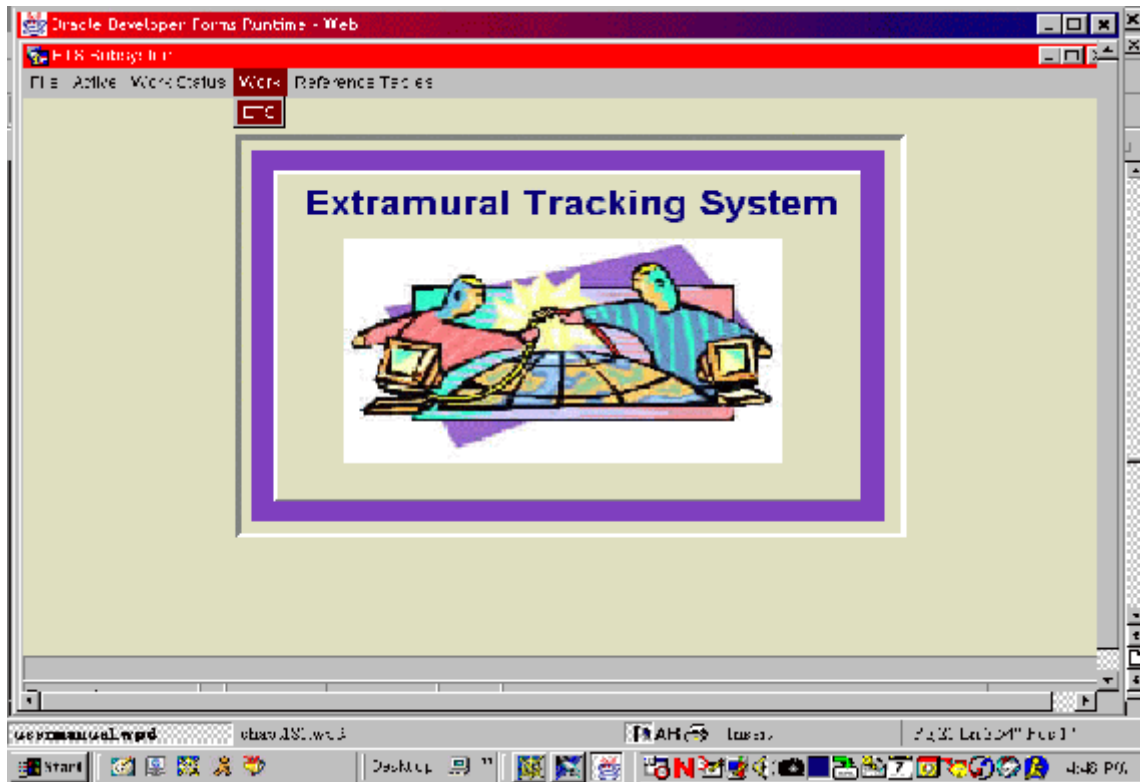
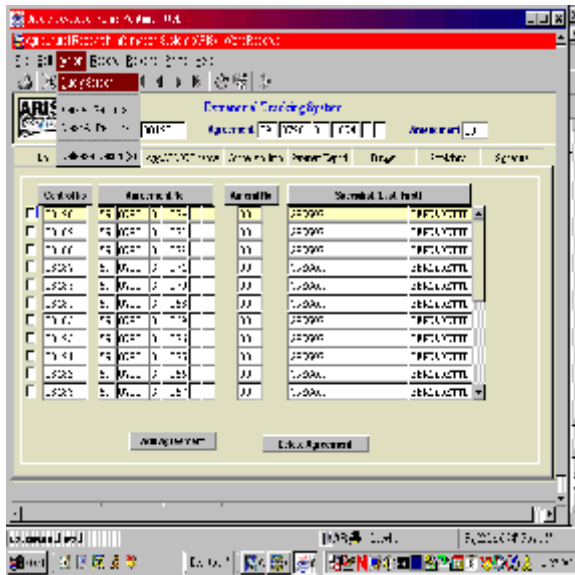


Figure 5; ETS Subsystem Screen

- Locate the amendment/work record in ETS, by selecting "Work" then "ETS" from the tool bar.

## EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS



**Note:** The work record (amendment) that you have created will now be displayed on this screen (Figure 6). The system will automatically propagate the new amendment number in the work record.

Figure 6; ARIS Work Records (List tab)

- Select “Action” then “Query Screen” from the tool bar.

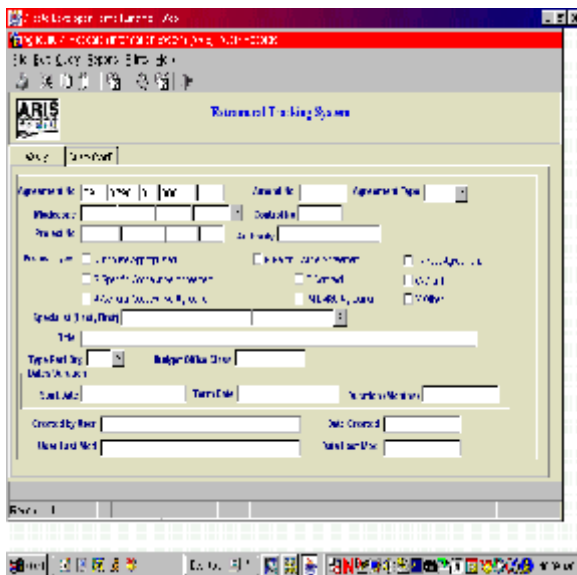


Figure 7; ARIS Work Records (Query tab)

- Enter the search criteria in any of the fields on the Query Screen to retrieve the agreement to be amended, for example: Agreement No., Control No., Project No., etc.
- Select “Query” then “Execute” from the tool bar or press “Enter”.

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

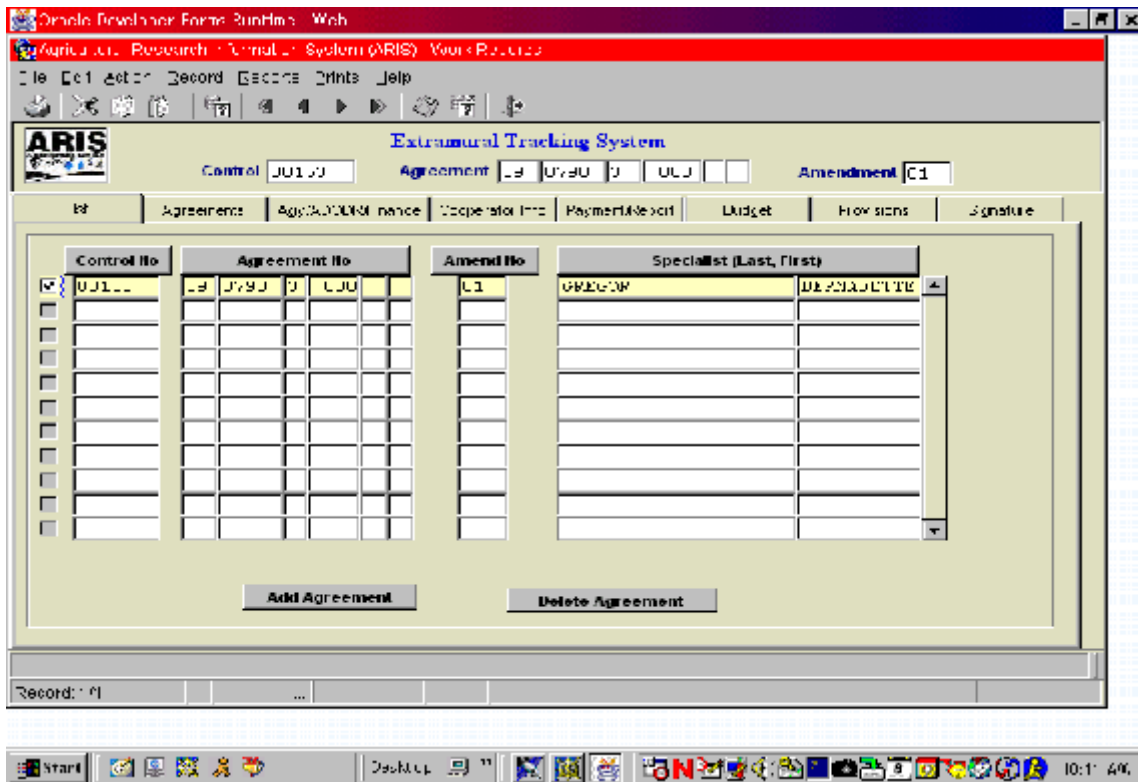


Figure 8; ARIS Work Records (List tab)

- Check the box to the left of the work record (amendment).
- To modify any of the following tabs (select as applicable):
  - , Agreements tab
    - Period of Agreement - retrieved through Project No. (1)  
Go to Project No. Field, (2) click on "?", (3) in the "find" box, enter the % then the project no., (4) click "find", (5) highlight the appropriate number from the list, (6) click "ok".
    - Change in obligation - propagates from the Budget screen (Budget tab)
    - Comments - use this box to specify the amendment changes (Comments will print as an attachment to the REE-451.)

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

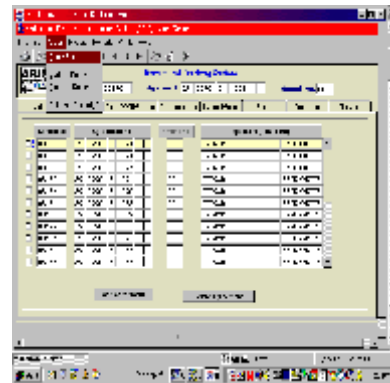


Figure 8: ARIS Work Records (List tab) continued

- , Agy/ADODR/Finance
- , Cooperator Info.
- , Payment/Report
- , Budget

(1) Enter Accounting code, FY, and dollar amount and (2) Click on “Calculate” button to complete the budget screen.

**Note: Add additional lines of funding by clicking on “Add Record” at the bottom of the screen (the cursor will move to the next line)**

- , Provisions (change as applicable)
- , Signature
  - Enter the ADO Signature Information
  - (1) click on “?”, (2) in the “find” box, enter the % then the ADO’s last name,
  - (3) click “find” or highlight the appropriate name from the list, (4) click “ok”.
  - ADO date (mm-dd-yyyy)
  - Click on the applicable box to approve or disapprove the award.
- Click on “List” tab at the top of the screen to save the record. The “Save Prompt” will appear, click “yes”.
- See Printing Instructions.



# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

## Create a Correction

A correction record is simply a record to fix something that was originally incorrect, such as a spelling error, a name, an address, etc. Once the correction is complete, it will override the original incorrect record in the Active File.

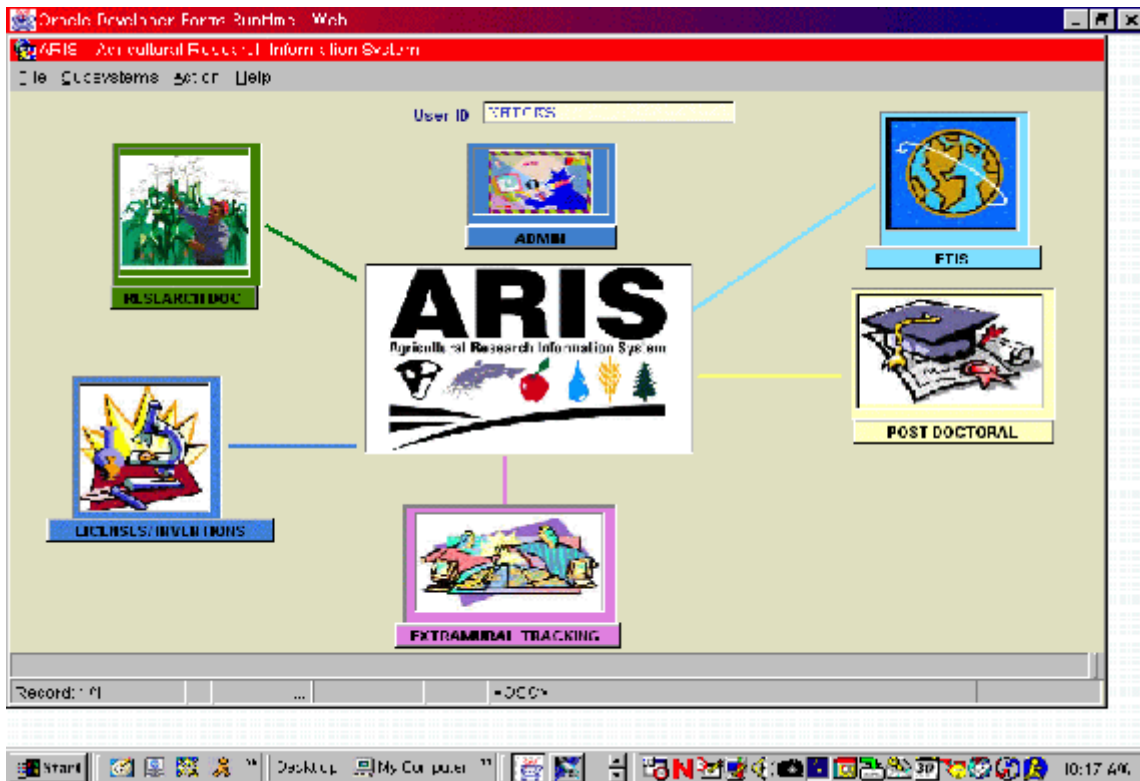


Figure 1; ARIS Welcome Screen

- Click the “Extramural Tracking” Icon

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

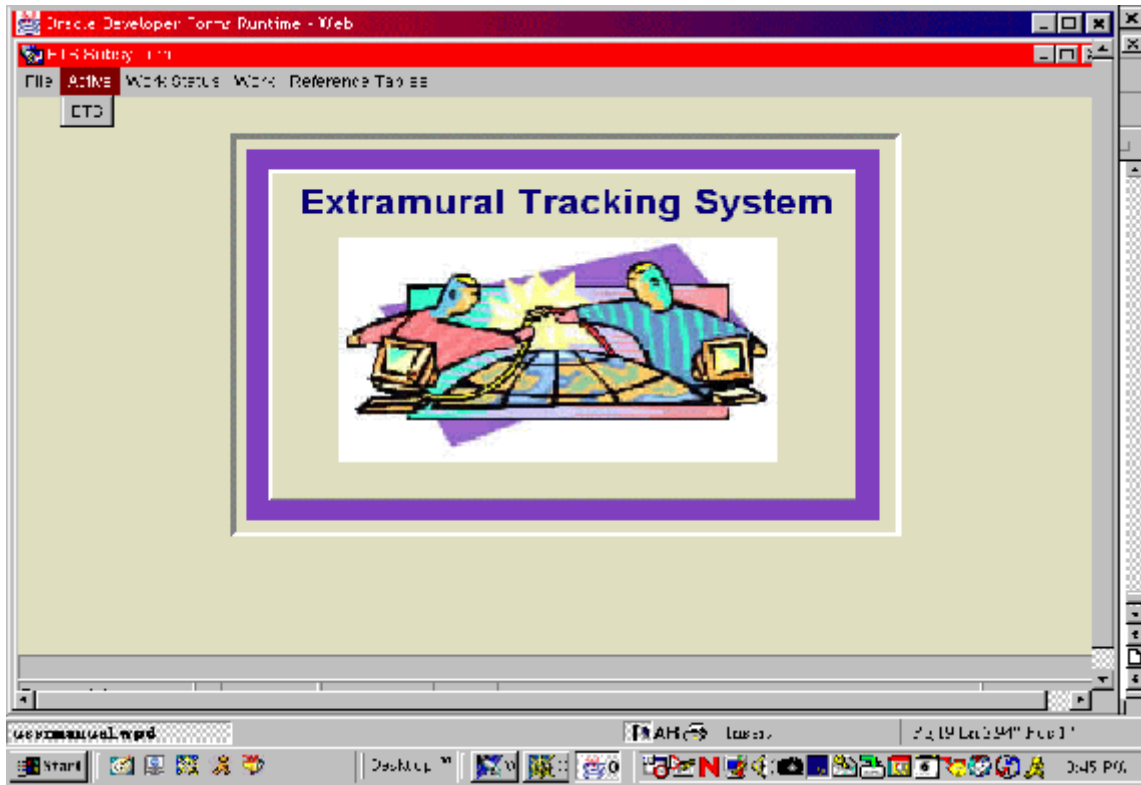


Figure 2; ETS Subsystem Screen

- Select "Active" then "ETS" from the tool bar.

## EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

The screenshot shows the ARIS Extramural Tracking System (ETS) Query tab interface. The window title is "Oracle Developer: Forms 6.0.1 File - Web". The browser address bar shows "http://ipaddress:port/.../System (AFS) /Active Records". The interface includes a menu bar with "File", "Edit", "Query", "Reports", "Prints", and "Help". A toolbar contains "Execute" and "Clear" buttons. The main area is titled "Extramural Tracking System" and contains a "Query" tab. The query screen has several input fields and checkboxes:

- Agreement No: 50 0770 [ ] 7107 [ ] [ ]
- Amend No: [ ]
- Agreement Type: [ ]
- Modcode: [ ] [ ] [ ] [ ]
- Control No: [ ]
- Project No: [ ] [ ] [ ] [ ]
- Authority: [ ]
- Budget Class: [ ]
- Project Type:  In-house Appropriated,  B-Fiduciary Agreement,  I-Institution Agreement,  S-Specific Cooperative Agreement,  C-Contract,  U-Grant,  A-General Cooperative Agreement,  P-P480 Agreement,  X-Other
- Specialist (Last, First): [ ] [ ]
- Title: [ ]
- Type Port Org: [ ]
- Start Date: [ ]
- Term Date: [ ]
- Duration (Months): [ ]
- Created by User: [ ]
- Date Created: [ ]
- User Last Mod: [ ]
- Date Last Mod: [ ]

At the bottom, there is a "Record 1/1" indicator and a Windows taskbar showing the Start button, several application icons, and the system clock displaying "7:03 PM".

Figure 3; ARIS Active Records (Query tab)

- Enter the search criteria in any of the fields on the Query Screen to retrieve the agreement to be corrected, for example: Agreement No., Control No., Project No., etc.
- Select "Query" then "Execute" from the tool bar or press "Enter".

## EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

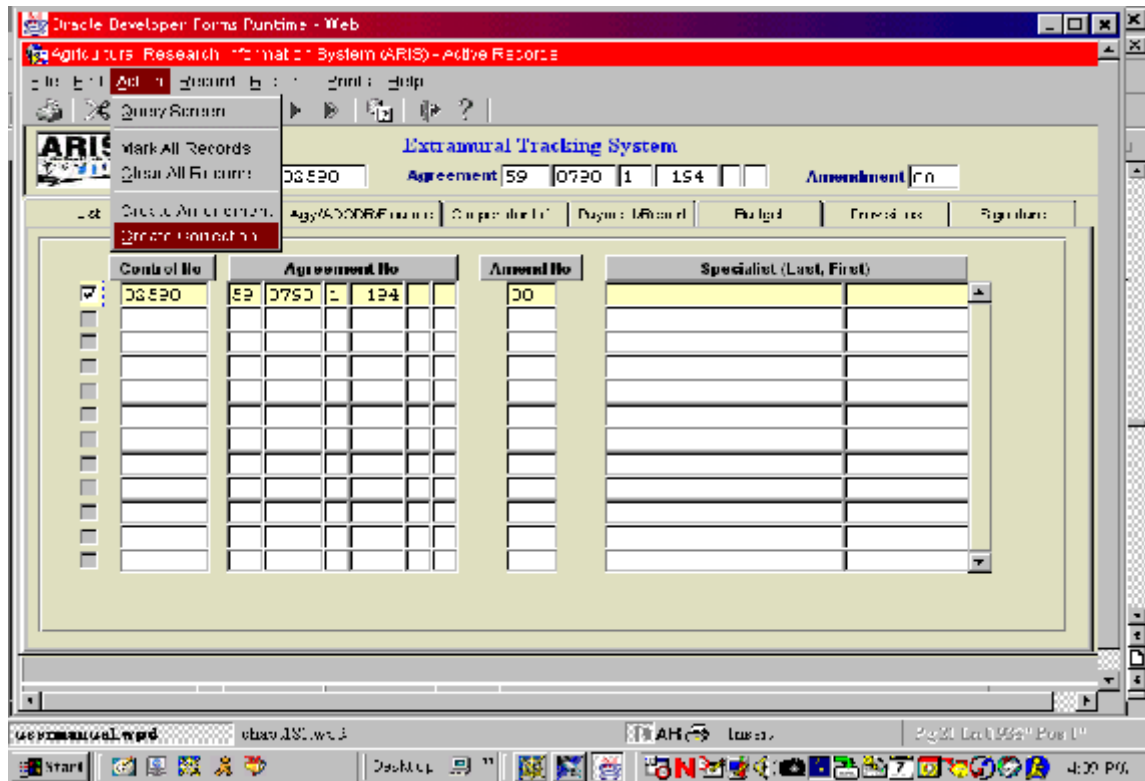


Figure 4; ARIS Active Records (List tab)

- Mark the box to the left of the project that requires the correction.
- Select “Action” then “Create Correction” from the toolbar. Click “yes” at the “Do you want to continue . . .” prompt. Next the “Marked record processing is complete” prompt will display, click “ok”.
- Select “File” then “Exit” to leave Active records and proceed with data entry on Work records.

## EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

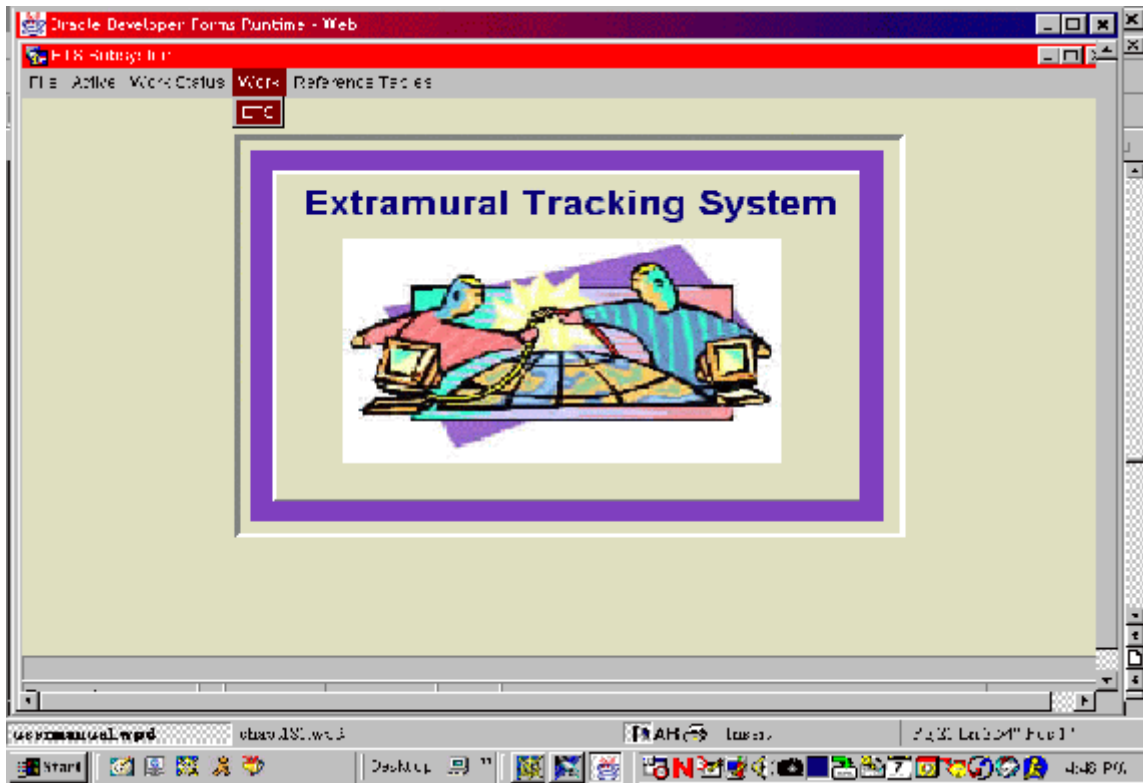
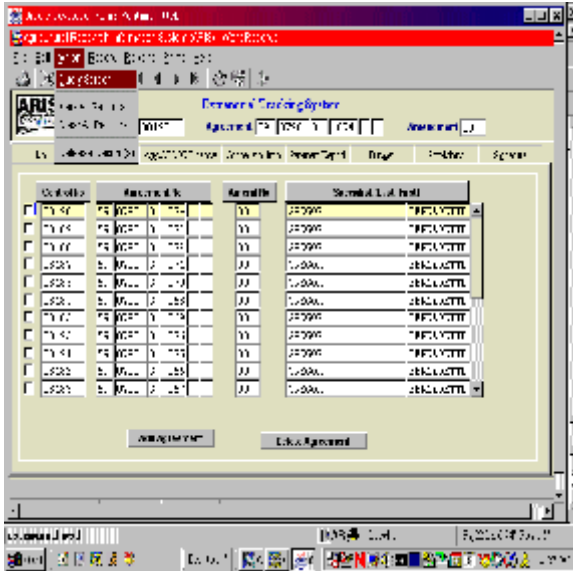


Figure 5; ETS Subsystem Screen

- Locate the correction/work record in ETS, by selecting "Work" then "ETS" from the tool bar.

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS



**Note: The work record (correction) that you have created will now be displayed on this screen (Figure 6).**

Figure 6; ARIS Work Records (List tab)

- Select “Action” then “Query Screen” from the tool bar.

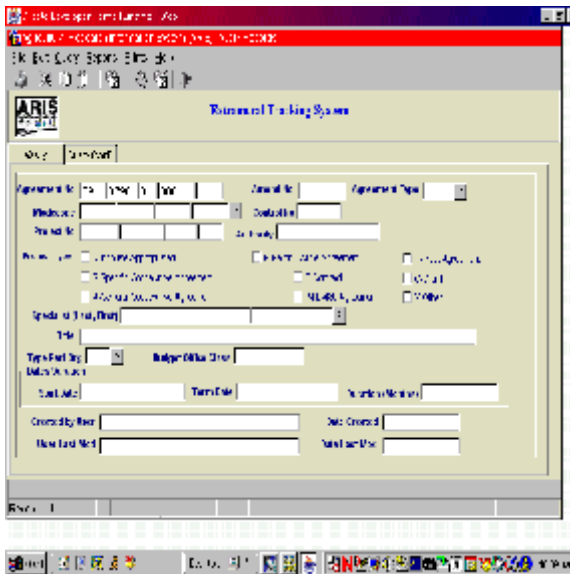


Figure 7; ARIS Work Records (Query tab)

- Enter the search criteria in any of the fields on the Query Screen to retrieve the agreement to be corrected, for example: Agreement No., Control No., Project No., etc.
- Select “Query” then “Execute” from the tool bar or press “Enter”.

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

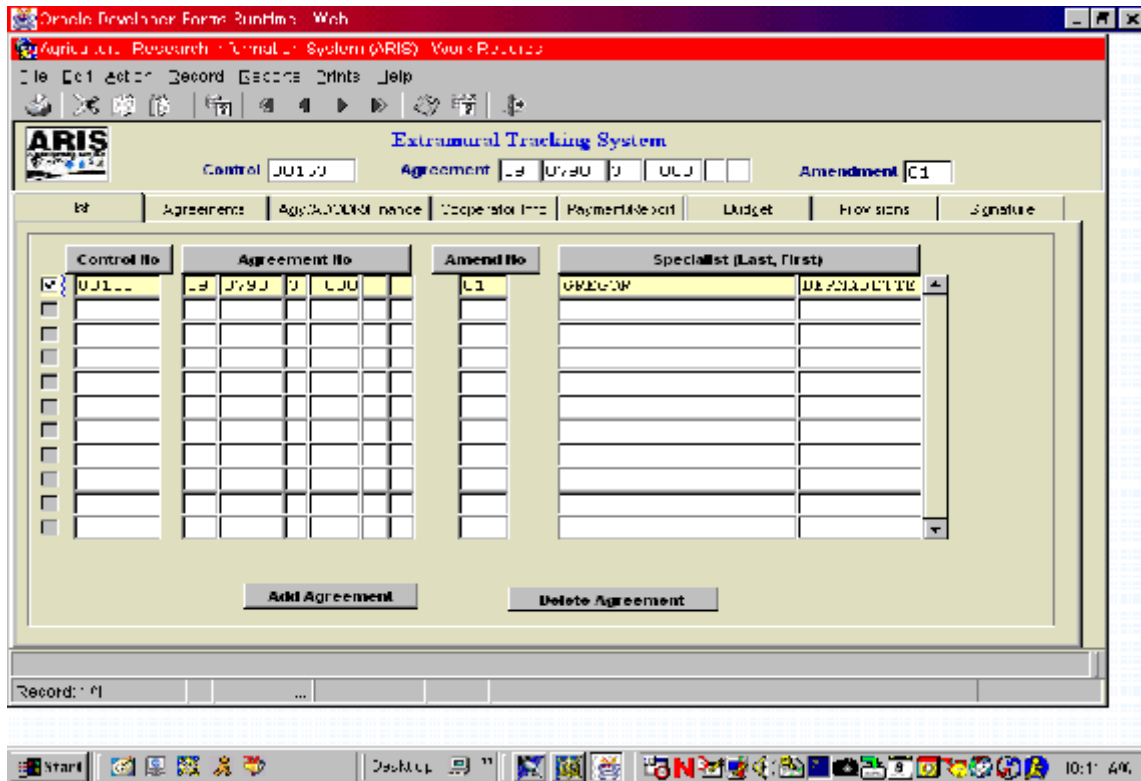
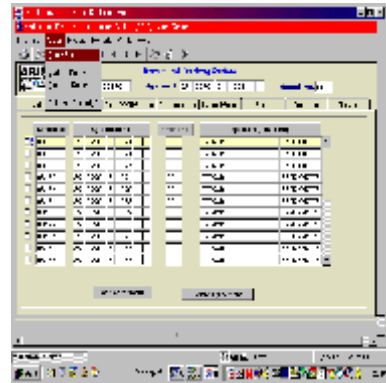


Figure 8; ARIS Work Records (List tab)

- Check the box to the left of the work record (correction).
- To modify any of the following tabs (select as applicable):
  - , Agreements tab
    - Period of Agreement - retrieved through Project No. (1)  
Go to Project No. Field, (2) click on "?", (3) in the "find" box, enter % then the project no., (4) click "find", (5) highlight the appropriate number from the list, (6) click "ok".
    - Change in obligation - propagates from Budget screen (Budget tab)
    - Comments - use this box to specify the amendment changes (Comments will print as an attachment to the REE-451.)

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS



8; ARIS Work Records (List tab) continued

- , Agy/ADODR/Finance
- , Cooperator Info.
- , Payment/Report
- , Budget

(1) Enter Accounting code, FY, and dollar amount and (2) Click on "Calculate" button to complete the budget screen.

**Note: Add additional lines of funding by clicking on "Add Record" at the bottom of the screen (the cursor will move to the next line).**

- , Provisions (Change as applicable)
  - , Signature
- Enter the ADO Signature Information

(1) click on "?", (2) in the "find" box, enter % then the ADO's last name, (3) click "find" or highlight the appropriate name from the list, (4) click "ok".

- ADO date (mm-dd-yyyy)

- Click on the applicable box to approve or disapprove the award.

- Click on "List" tab at the top of the screen to save the record . The "Save Prompt" will appear, click "yes".
- See Printing Instructions



# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

## Printing Instructions

Figure 1; ETS Subsystem Screen

- Select “Work” then “ETS” from the tool bar.

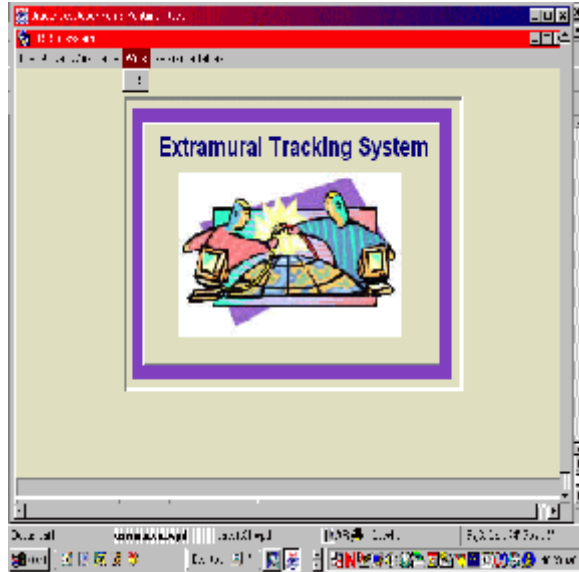
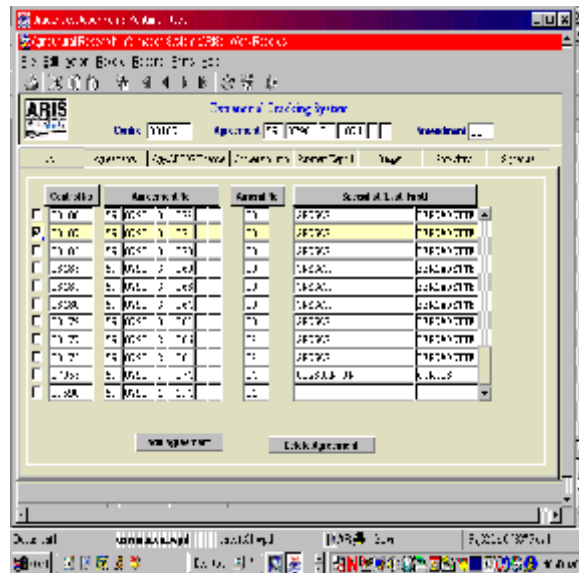


Figure 2; ARIS Work Records (List tab)

- Locate the agreement from the list and check the box to its left. (You may use the “Query” feature page 29, figures 6-7)



# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

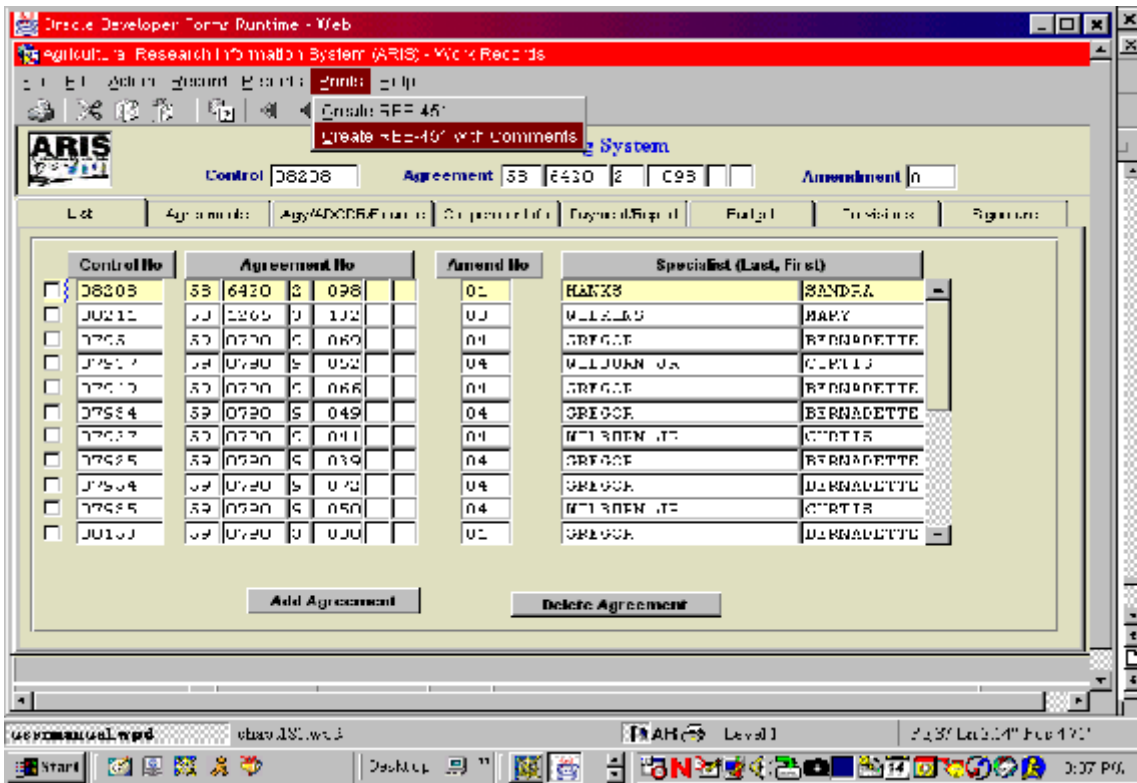
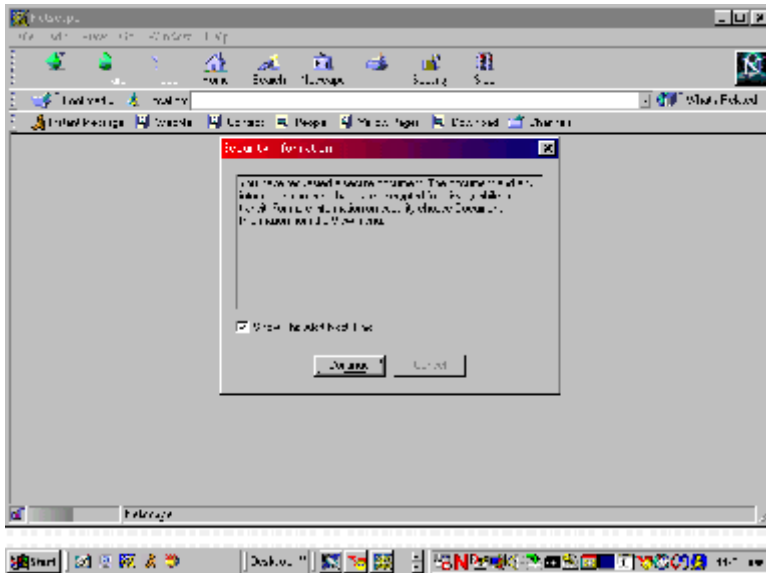


Figure 3; ARIS Work Records (List tab)

- Select "Prints" from the tool bar.
- Select either "Create REE-451" or "Create REE-451 with Comments".

**Note: Comments will print as an attachment to the REE-451.**

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS



Note: Figure 4; (Security Information Screen) may appear, if so, click “continue” and Adobe Acrobat will automatically create and display the print file (Figure 5). Some systems may skip the Security Information Screen.

Figure 4; Security Information Screen

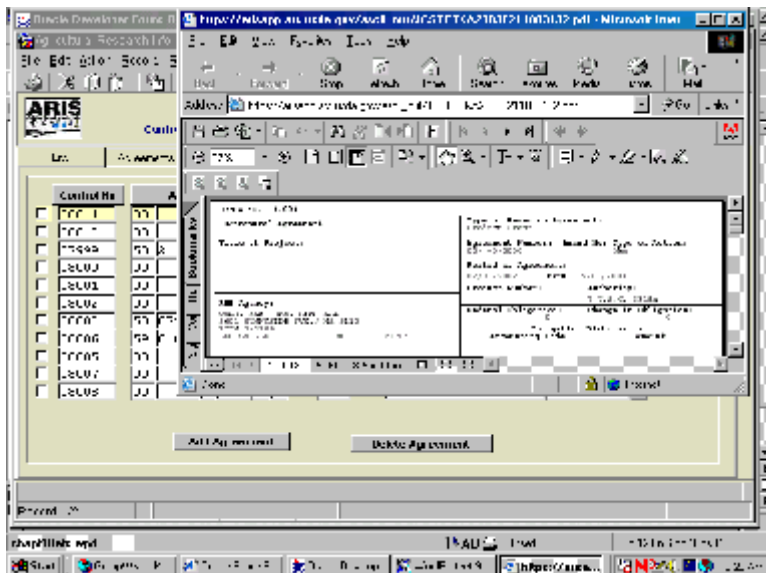


Figure 5; Official Copy of the REE-451 (Adobe Acrobat)

- Review the REE-451 for completeness and accuracy of the information.

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

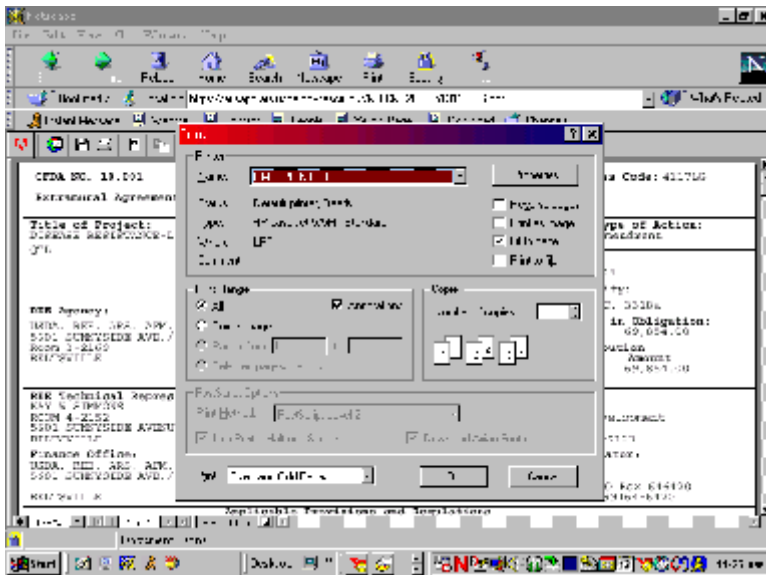


Figure 6; Print Option Screen

- Select "Print" then "ok".
- Close the Adobe file. You will be returned to the List screen (Figure 3).
- Printing is complete!

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

## Release Instructions

Figure 1; User Logon Screen

- Enter your username:
- Enter your password:
- Enter the database: (*ARIS*)
- Click on the “Connect” button

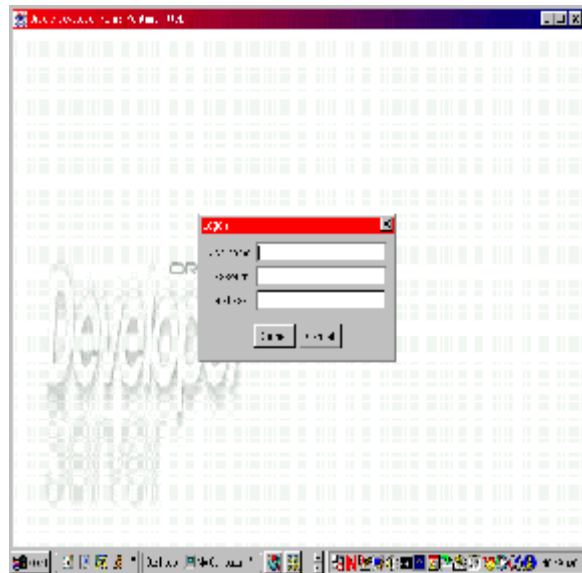


Figure 2, ARIS Welcome Screen

- Click the “Extramural Tracking” Icon

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

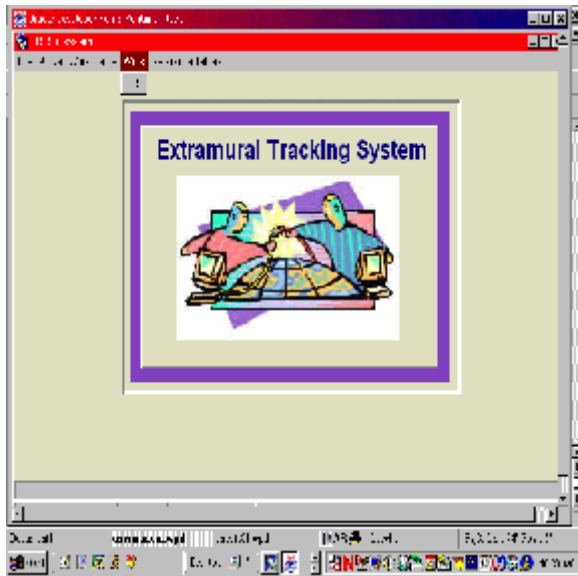


Figure 3; ETS Subsystem Screen

- Select “Work” then “ETS” from the tool bar.

**Note: The work records (new & amended) that you have created will be displayed on this screen (Figure 4).**

- Select “Action” then “Query Screen” from the tool bar.

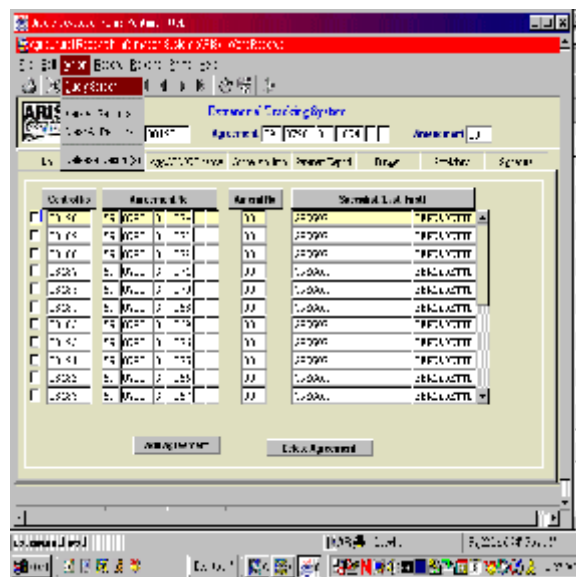


Figure 4; ARIS Work Records (List tab)

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

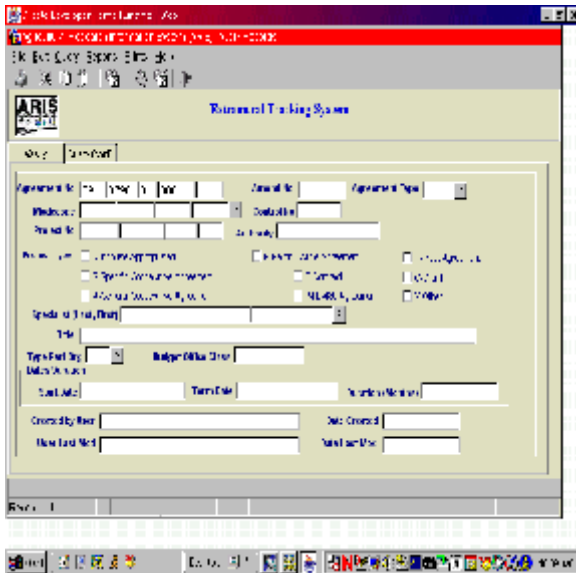


Figure 5; ARIS Work Records (Query tab)

- Enter the search criteria in any of the fields on the Query Screen to retrieve the agreement to be released, for example: Agreement No., Control No., Project No., etc.
- Select “Query” then “Execute” from the tool bar or press “Enter”.

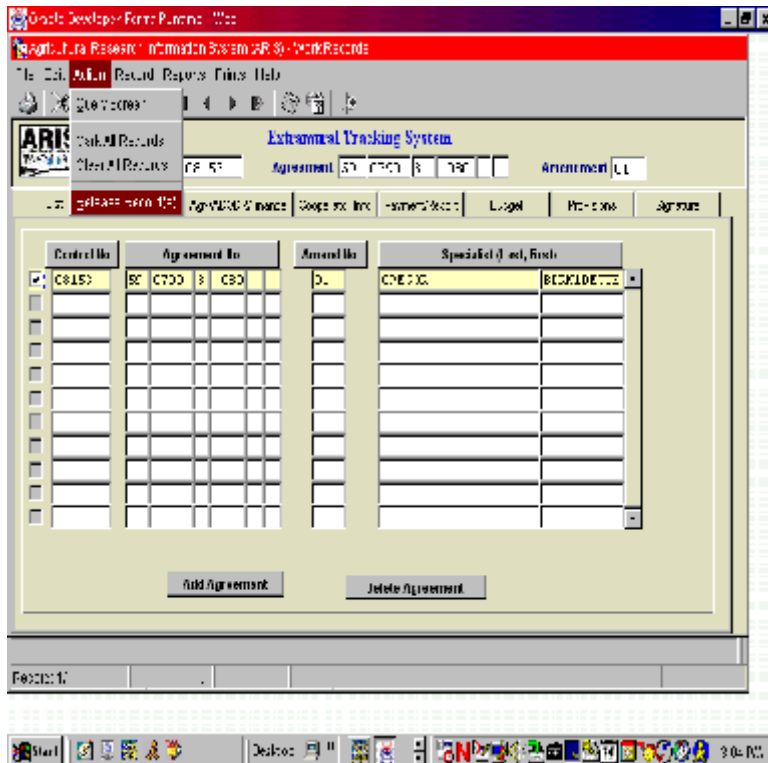


Figure 6; ARIS Work Records (List tab)

- Mark the box to the left of the project to be released.
- Select “Action” then “Release Record(s)” from the toolbar.
- The record is released to Work Status until the overnight process is run which moves it to the Active File.

# EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

## Other Information

### Entering existing active agreements:

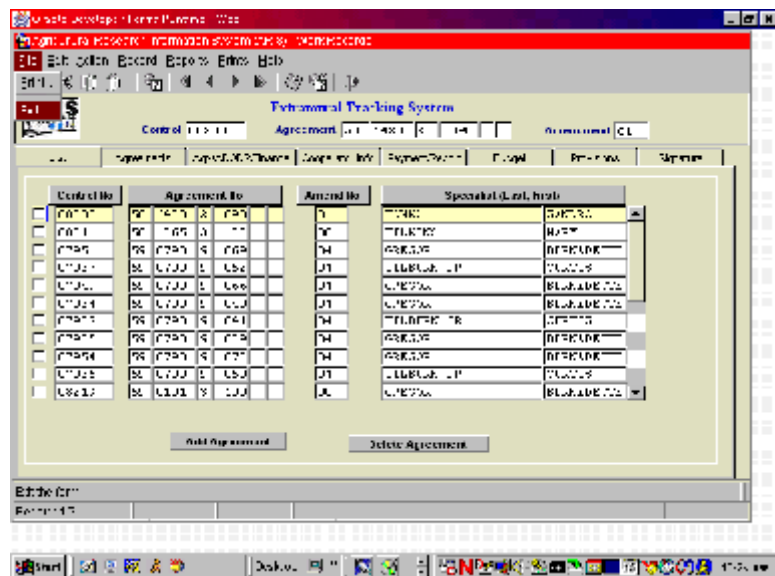
**Note: Effective immediately, it is very important that you begin to enter your active agreements into ETS. Start with FYO3 agreements first. Agreements for the first and second quarters of FYO3 were entered by EAD, however it is suggested that you check to insure that all agreements are there and that the data is accurate.**

When entering an agreement's financial history, all the historical accounting information must be entered in the "Budget" tab. Documenting the full history (time extension, changes in ADODR and PI information, etc.) in the "Comments Field" on the "Agreements" tab is optional. Follow the steps below before entering historical agreement data:

- Query (pg. 19) the Active File in ETS and;
- Check the list of previously entered agreements (provided by EAD) to insure that data entry is not duplicated.
- If the agreement is found, verify the information and if necessary, create a correction. (See "Create a Correction" instructions, pg. 25).
- If the agreement is **not** found, follow the instructions to "Add a New Agreement", pg. 7 and **be sure to enter the latest amendment number in the Amend No. field.**
- If you have any questions, please call EAD on 301-504-1141 or 504-1142.

### Properly exiting ETS

- **Select "File" then "Exit" from the tool to properly exit ETS.**





## EXTRAMURAL TRACKING SYSTEM (ETS) USER INSTRUCTIONS

### Using the Search feature in ETS

- Helpful tip: When using the search feature in ETS, try using KEYWORDS. For example, when searching for University of Maryland search using “% Maryland”.

### Idle time

- If you are idle for more than 15 minutes the system may log you off.