

Portfolio Analysis and Management System (PAMS) User Guide for External PAMS User

Version 5.0

August 2012

Prepared for:

DOE Office of Science
Office of Business Policy and Operations





Revision History

Date	Document Version	Description of Changes	Author
02/27/2012	1.0	Original	REI Systems
05/18/2102	2.0	Updated the screen shots and content based on changes made to external registration process	REI Systems
06/08/2012	3.0	Made changes to the document based on comments from DOE.	REI Systems
08/17/2012	4.0	Made changes to the document based on comments from DOE.	REI Systems
08/24/2012	5.0	Made minor format/grammar changes. Updated screen shots for Lab Proposals.	REI Systems



Table of Contents

- 1 INTRODUCTION 1**
- 2 GETTING STARTED 1**
 - 2.1 GETTING FAMILIAR WITH THE PAMS USER INTERFACE 1
 - 2.2 LOGGING IN..... 1
 - 2.2.1 PAMS Account Is Locked 1
 - 2.2.2 Forgot PAMS Password..... 1
 - 2.3 SUPPORTED BROWSERS 2
 - 2.4 SYSTEM NAVIGATION 2
 - 2.5 SYSTEM CONVENTIONS..... 4
 - 2.6 SEARCH FIELDS..... 4
- 3 WHAT CAN I DO IN PAMS?..... 6**
 - 3.1 REGISTRATION 6
 - 3.1.1 How Do I Register to PAMS?..... 6
 - 3.1.2 How Do I Register to an Institution in PAMS?..... 10
 - 3.1.2.1 Register Using Grants.Gov Proposal Information 10
 - 3.1.2.2 I Want to Register as a PI for the Institution 11
 - 3.1.2.3 I Want To Register as an SRO to the Institution 12
 - 3.1.2.4 I Want To Register as a Point of Contact (POC) to the Institution..... 15
 - 3.1.2.5 Register Using Institution Information..... 17
 - 3.1.2.6 Register to Multiple Institutions 23
 - 3.2 MANAGE INSTITUTIONS 23
 - 3.2.1 Who Can Become an Administrator for an Institution?..... 23
 - 3.2.2 What Are Administrative Privileges? What Can I Do with Them? 23
 - 3.2.3 How Can I Manage Privileges? 24
 - 3.2.4 What Is Peer Access? How Does It Work?..... 24
 - 3.2.5 Institution Folder..... 24
 - 3.2.5.1 Manage Institution Profile 26
 - 3.2.5.2 Manage Users from the Institution..... 27
 - 3.2.6 Manage Users 32
 - 3.2.7 Remove from Institution 35
 - 3.3 MANAGE SUBMISSIONS 36
 - 3.3.1 How Do I Respond to a Solicitation? 37
 - 3.3.2 How Do I Search Solicitations?..... 37
 - 3.3.3 I Am Not Logged in to PAMS..... 37
 - 3.3.4 I Am Logged in to PAMS..... 38
 - 3.3.4.1 Create and Submit a Preproposal 39
 - 3.3.4.2 Create and Submit a Letter of Intent 41
 - 3.3.4.3 Create and Submit a Proposal..... 44
 - 3.3.4.4 Reopen and Resubmit a Submission 49
 - 3.3.4.5 I Have Received an Invitation from DOE to Submit a Proposal in PAMS..... 50



3.3.4.6	I Want To View Submissions from My Institutions	50
3.3.4.7	I Want To Manage Peer Access for a Submission	50
4	GLOSSARY	54
5	PAMS HELPDESK CONTACT INFORMATION	55

List of Tables

Table 1.	Recommended Browsers for PAMS Access.....	2
Table 2.	Types of Messages Generated by PAMS	4



1 INTRODUCTION

The *Portfolio Analysis and Management System (PAMS)* is the premiere online solution to financial awards management. Created in collaboration with the Department of Energy (DOE) - Office of Science, PAMS leverages proven methodologies to deliver effective management and communication of solicitations, proposals, and financial awards. The PAMS experience is role- and user-sensitive, meaning that each user will see only information and action options that are pertinent to him or her. This customized approach minimizes errors in processing, simplifies the application process, and ensures sensitive information stays protected.

This document is a comprehensive guide to PAMS for financial award applicants. Included are step-by-step directions on how to register, apply for financial awards, track your proposals, and take action on any proposal- or financial award-related tasks assigned to you. The user guide begins with a **Getting Started** section, which provides a high-level overview of the proposal process, directions on how to log in and navigate through PAMS, and what you can expect to see in PAMS.

2 GETTING STARTED

Welcome to PAMS! In this section, you will find information on the business processes supported by PAMS, the user roles that support those processes, how to log in and navigate through PAMS, and what you can expect to see while using PAMS.

2.1 Getting Familiar with the PAMS User Interface

The following sections introduce you to the ways you will interact with PAMS.

2.2 Logging In

Follow the steps below to log in to PAMS:

1. Open your Internet browser.
2. Enter the Website address (<https://pamspublic.science.energy.gov/>) for DOE PAMS and click **Enter**.
3. Enter your user name and password.
4. Click **Log In**.

2.2.1 PAMS Account Is Locked

PAMS locks your account if you try to log in **three times** with an incorrect password. You will have to wait for 30 minutes before attempting to log in again.

2.2.2 Forgot PAMS Password

To reset your password, click the **Forgot Password** link on the login page. You will have to answer your previously set-up security question. If you have forgotten your security question's answer, please contact the PAMS Help Desk ([Section 5](#)) for assistance with resetting your password.



Existing User Login

Error:
Your account has been locked for 30 minutes for security reasons. Please try logging in after 30 minutes or contact the Call Center.

Username

Password

[Forgot Password](#)

New User Registration

- [Search Solicitations](#)
- [Create New PAMS Account](#)

Other Links

- [➤ Recommended Settings](#)
- [➤ Contact Us](#)
- [➤ User Registration Guide](#)

2.3 Supported Browsers

Table 1 lists the supported browsers that are recommended for access to the complete set of features available in PAMS.

Table 1. Recommended Browsers for PAMS Access

Browser	Version
Internet Explorer	8.0 and above (9.0 is recommended)
Firefox	3.6 and above (11.0 is recommended)
Safari	5.1 and above (5.1 is recommended)
Chrome	20.0 and above (20.0 is recommended)

2.4 System Navigation

As with many other Web-based systems, your primary input tools are your keyboard and mouse. Additionally, most PAMS pages support keyboard navigation. You can use either the *Tab* key or your cursor to move to the next data entry field or link; use the *Enter* key to invoke a link. *Shift + Tab* moves through fields and links in reverse order.



Ref. #	Element	Description
1	Logout	Use <i>Logout</i> to exit PAMS. You will have to provide your credentials again to login to PAMS the next time.
2	Home	<i>Home</i> takes you to a dashboard page where you can see how many tasks you have, as well as statistics on your recently accessed files.
3	Tabs	There are tabs at the top of most PAMS pages to help you navigate through different modules in the system. The tabs shown here are Home, Proposals, and Institutions. The blue tab bar, DOE PAMS banner above it, and green menu bar at the very top right of the page can be hidden temporarily by clicking the double-arrows button  at the far right end of the blue tab bar. To make the blue tab bar, DOE PAMS banner, and green menu bar re-appear, click the double-arrows button  at the top right of the page.
4	Left Menu	Within each module, the main menu is often found at the left-hand side of the page. The main menu can be hidden by clicking the double arrow  at the top-left corner of the menu. To make the left menu re-appear, click the double-arrows button  at the top left of the page.
5	Grid	A table, or grid, is used when multiple records must be displayed. The left-most column may have arrows  to indicate that the rows are expandable. Click an arrow to expand a row and view detailed information about the record. You can also click the <i>Detailed View</i> link above the grid to expand all rows. The rows may be filtered by entering information in any one of the textbox fields immediately below the grid's column headings, and clicking the filter icon  next to it.



Ref. #	Element	Description
		<p>Most grids also have a Search feature. The search pane is accessed by clicking the <i>Search</i> link above the grid.</p> <p>The Page Size fields allow you to adjust the height of the grid by indicating the greatest number of [collapsed] rows that may appear on a page. Arrow buttons next to the page number allow you to page through when there are multiple pages.</p>
6	Context Menu	The right-most column in a grid is the <i>Options</i> column. Available options may vary from record to record. An arrow in the <i>Options</i> column means more options are available from which to select. This list of options is often called the context menu.
7	Breadcrumb Navigation	Each page in PAMS displays the navigation path you followed to reach the current page. If the navigation path is too long, it is summarized by the application. Hover over the  icon to view the summarized path details.
8	Floating Toolbar	PAMS has a floating toolbar at the bottom of the page that enables easy access to key functions. Options in the floating toolbar often include [View] Messages, [View] Favorites, [View] Recently Accessed, Print, and Create a Shortcut. Important page buttons may also appear in the floating toolbar.

2.5 System Conventions

Table 2 lists the conventions for messages generated by PAMS. Symbols used as part of these conventions are designed to convey system messages consistently and to provide you with a richer user experience.

Table 2. Types of Messages Generated by PAMS

Symbol	Denotes
	<p>Critical Error. This kind of error must be corrected in order for the system to save your information. If one or more errors of this kind appear on the page and are not corrected, the system will not save the data entered after the last successful save.</p> <p>Example: Entering “two” in a field where “2” is called for produces a Critical Error.</p>
	<p>Regular Error. This kind of error will let you save the information entered. However, if one or more errors of this kind appear on a page and are not corrected, the system will not change the status of the page to “Completed.” If these errors occur while updating the budget sheet on a proposal, for instance, the budget sheet will not be marked as complete and you will not be able to submit the proposal.</p> <p>Example: Entering no information in a field where data entry is required may produce a Regular Error.</p>
	<p>Exception. This symbol denotes either a discrepancy or inconsistency in the information entered. Such errors must be corrected or justified.</p>
	<p>Information. This symbol designates a note containing important information regarding your document or report.</p>
	<p>Success Message. This symbol appears when a particular process has been executed successfully, such as when information is saved or submitted.</p>

2.6 Search Fields

In this user guide, some search fields have a search requirement similar to the following:



- *Institution Name like: Enter the Institution Name or at least a part of it.*

The word *like*, as used here, means that if you are uncertain of the exact name of the institution (or whatever you are searching for), you can enter a part of the name of the institution you are searching for. For example, if you know that “Water” is part of the institution name (as in Waterfield Company or Waterman University), enter “water” in the search field and click **Search**. The system searches for and pulls up all institutions with “water” as part of the institution name.

This search method also works for numbers if *like* is a search option. For example, if you know that part of a solicitation number includes “FOA,” enter “FOA” only in the search field and click **Search**.



3 WHAT CAN I DO IN PAMS?

The PAMS external user application allows you to perform the following actions:



- Register
- Manage Institutions
- Manage Submissions.

The following sections explain each of these actions in detail.

3.1 Registration



The User Registration process in PAMS is a two-step process:

1. Register to PAMS
2. Register to an Institution

Registering to PAMS ensures that you have authorized access to PAMS, whereas registering to

an institution ensures that you are associated to an institution. Based on your role, you will be able to manage institutions and/or users within the institution. Once you have registered to PAMS, you will be able to view/update your profile as well.

3.1.1 How Do I Register to PAMS?

1. Visit the PAMS Website (<https://pamspublic.science.energy.gov/>).
2. Click the **Create New PAMS Account** link at the far right of the page.



U.S. DEPARTMENT OF ENERGY | Office of Science

Portfolio Analysis And Management System

Login

Existing User

Friday 18th May 2012 02:38:50 P.M. ET

Existing User Login

Username

Password

Log In

Forgot Password

New User Registration

[Search Solicitations](#)

[Create New PAMS Account](#)

Other Links

[Recommended Settings](#)

[Contact Us](#)

3. On the *Having Trouble Logging In* page, click the **No, I have never had an account** link and then click the **Create an Account** button.

Having Trouble Logging In?

Click on the appropriate option below to troubleshoot login issues.

Do you have a PAMS account?

No, I have never had an account

Create an Account

Registration within PAMS is a two step process:

- Create an individual account for yourself. This account should not be shared with any other user.
- Affiliate the account to your institution record if it already exists and affiliate your account to it. Each account can be associated with one or more institution(s).

Cancel [Create an Account](#)

[▶ Yes, but I did not complete my registration.](#)

[▶ Yes, but I forgot my username.](#)

[▶ Yes, but I forgot my password.](#)

[▶ Yes, but my account was disabled.](#)

[▶ Yes, but it was for a different institution. I am here to work for another institution.](#)

Cancel



- This will navigate you to the *Create Account* page. Complete the form. Note that fields marked by a red asterisk are mandatory. Click the **Save and Continue** button when you are finished.

Create Account

Enter required information as shown below. When finished, click Save and Continue.

Fields with * are required

Personal Information

Prefix (Example: Mr., Ms., Dr.)	<input type="text"/>
* First Name	<input type="text"/>
Middle Initial	<input type="text"/>
* Last Name	<input type="text"/>
Suffix (Example: Jr., Sr., III)	<input type="text"/>
* Username	<input type="text"/>
* Password	<input type="password"/> <small>(Passwords must be at least eight(8) characters in length and contain the following characters: At least one lower case alphabet (a-z). At least one upper case alphabet (A-Z). At least one number (0-9). At least one special character (for example ~,!,@,#,*))</small>
* Retype Password	<input type="password"/>
* Security Question	Select One
* Security Answer	<input type="text"/>
* Email	<input type="text"/>



- Continue the *Create Account* process by completing all required fields and clicking **Create Account**.

Create Account

Enter required information as shown below. When finished, click Save and Continue.

Personal Information

Prefix (Example: Mr., Ms., Dr.)	Mr
First Name	Kiran
Middle Initial	
Last Name	Kon
Suffix (Example: Jr., Sr., III)	

Contact Information

Congressional District (Example: 01)

Specify Domestic Address

▶ [Click here to enter physical location address if different from mailing address. \(Providing this address is optional.\)](#)

Create Account

- You must read the notice to users and click the **Accept** button to complete the PAMS registration process.

Agreement

Note(s):
Please read this information carefully and accept by clicking on the 'Accept' button to proceed. You may decline it by clicking on the 'Decline' button, and you will not be able to log in.

PORTFOLIO ANALYSIS AND MANAGEMENT SYSTEM (PAMS)

NOTICE TO USERS

This is a U.S. Government, Department of Energy (DOE) system and it is for the use of authorized users only. The system is to be used for official Government business pertaining to the inquiring, applying, and managing of proposals and awards. Unauthorized access or use of this system may subject violators to criminal, civil, and/or administrative action. It is protected by various provisions of Title 18, U.S. Code. Violations of Title 18 are subject to criminal prosecution in Federal court.

I acknowledge and understand my responsibilities and agree to comply with the rules of behavior for PAMS.

I acknowledge and understand my responsibilities and agree to comply with the rules of behavior for DOE.

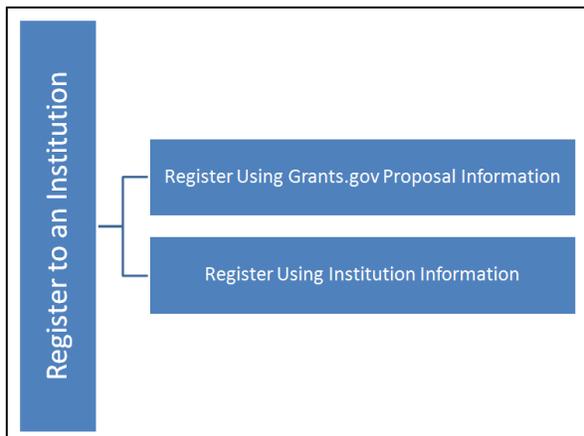
Decline **Accept**



Note *You are now registered to PAMS and are logged in. You can browse through solicitations and view other information in PAMS, but you will need to register to an institution before you can submit proposals or work with previous submissions.*

3.1.2 How Do I Register to an Institution in PAMS?

After you have created an account in PAMS, you can register to an institution in PAMS if you wish to submit proposals or work with previous submissions.



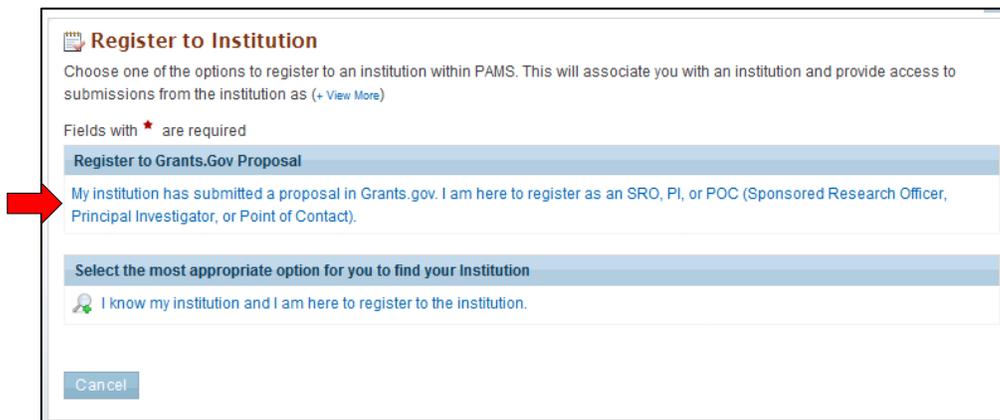
Registering to an institution is performed using one of the following options:

- Register using Grants.gov Proposal Information.
- Register using Institution Information.

3.1.2.1 Register Using Grants.Gov Proposal Information

Note *If you are already registered to an institution—or you do not want to register to an institution for any other reason (e.g., registering as a reviewer)—click the Cancel button on this page. Upon doing so, you will be registered to PAMS but will not be registered to any institution.*

1. To register to an institution using Grants.Gov proposal information, click the **My institution has submitted a proposal in Grants.gov. I am here to register as an SRO, PI, or POC** link.





- The form shown below appears. The next sections discuss the different roles available to you in PAMS and their respective requirements. Please review them before clicking the **Save and Continue** button.

3.1.2.2 I Want to Register as a PI for the Institution

The Principal Investigator (PI) is responsible for:

- Composing and submitting proposals in response to solicitations
- Overseeing the research activities supported by DOE awards.

Follow these steps to register as a PI:

1. Enter *Proposal ID* and *Email* address.
2. Choose the PI role on the *Register to Institution* page. Click the **Save and Continue** button.

Note *The proposal ID and email address should match the proposal ID and email address listed in the automated email sent by PAMS upon receiving the SF424 proposal, which was submitted via Grants.gov. Only one PI can register to the institution using the Grants.gov proposal information.*



3. Upon successful verification, you are taken to the *Institutions* tab.

U.S. DEPARTMENT OF ENERGY | Office of Science

Portfolio Analysis And Management System

youussef Logout

Proposals Institutions

Browse Guide Me Tuesday 22nd May 2012 03:12:07 P.M. ET

You are here: Home » Institutions » Browse

Institutions - List

Success:
You have been successfully registered to the institution.

Register to Another Institution Detailed View

Page size: 15 Go 14 items in 1 page(s)

Name	City	State	DUNS	Type	Options
Abilene Christian University	Abilene	TX	073171951	Private Institution of Higher Education	View
Adelphi University	Long Island	NY	N/A		View
Advanced Energy Systems, Inc.	Medford	NY	042903026	Small Business	View

Note *At this point, you are registered as a PI for your specific institution. Additionally, you have been granted access to view the proposal that was used to register to the institution.*

3.1.2.3 I Want To Register as an SRO to the Institution

The SRO role is usually held by a representative from the Sponsored Research Officer (SRO) responsible for submitting proposals to DOE Funding Opportunity Announcements and managing institution information and users in PAMS. In some institutions, the office represented is called the Business Officer (BO) or Administrative Officer (AO).

Follow these steps to register as an SRO/AO/BO:

1. Enter *Proposal ID* and *Email* address.
2. Choose the **SRO/AO/BO** role on the *Register to Institution* page. Click the **Save and Continue** button.



Register to Institution - Grants.gov Proposal

Enter proposal ID, email and choose a role to register to the institution and get view access to the proposal. If you are an SRO/BO/AO(Sponsored Research Officer/Business Officer) (+ View More)

Fields with * are required

Institution Details

* Proposal ID

* Email(as entered in Grants.gov proposal)

* Choose Role

- SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer)
- PI (Principal Investigator)
- Other (Point of Contact)

Note *The proposal ID and email address should match the proposal ID and email address listed in the automated email sent by PAMS upon receiving the SF424 proposal, which was submitted via Grants.gov. Only one SRO can register to the institution using the Grants.gov proposal information.*

3. If the institution you wish to register to does not have an Administrative SRO/BO/AO in PAMS yet, you will be prompted to register as an Administrative SRO/BO/AO for the institution.

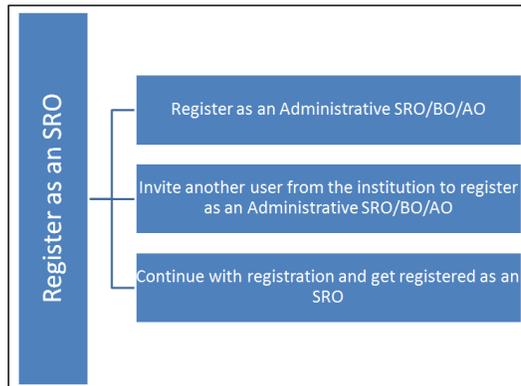
You are here: [Home](#) » [Welcome](#)

Register to Institution

Success:
Congratulations. You are registered as an SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer) for this institution
Institution Name:North Dakota State University
EIN: 45-6002439
DUNS: 803882299

Are you the administrator for this institution? Do you wish to have the access to manage this institution in PAMS?

- Yes. Please grant me the administrator privileges for this institution
- No. I want to send an invitation to the appropriate administrator to register with PAMS.
- No.



At this point, you will be presented with the following three options:

- Register to the institution as an Administrative SRO/BO/AO
- Invite another user from the institution to register as an Administrative SRO/BO/AO
- Continue with the registration process and just get registered as an Administrative SRO/BO/AO.

4. If you choose to register as an Administrative SRO/BO/AO, click the check box to accept the agreement and click the **Save and Continue** button. This will take you to the *Institutions* tab.

You are here: Home » Welcome

Register to Institution

Grant Administrative Privileges

I am the designated administrator to manage this institution in PAMS. I certify that all the information provided by me on this form is true and correct.

Cancel Save and Continue

5. If you choose to invite another user to register as an Administrative SRO/BO/AO to the institution, provide all mandatory inputs on page (all fields marked by a red asterisk are mandatory) and click **Send Email**. This will take you to the *Institutions* tab.

You are here: Home » Welcome

Register to Institution

Please invite the administrator for your institution to register with PAMS.

* Email ID

* First Name

* Last Name

Comments

Approximately 1 page (Max 2000 Characters): 2000 Characters left.

Cancel Send Email



6. If you simply want to register to the institution, you are taken to the *Institutions tab*.

U.S. DEPARTMENT OF ENERGY | Office of Science

Portfolio Analysis And Management System

youussef | Logout

Proposals Institutions

Browse Guide Me Tuesday 22nd May 2012 03:12:07 P.M. ET

You are here: Home » Institutions » Browse

Institutions - List

Success:
You have been successfully registered to the institution.

Register to Another Institution Detailed View

Page size: 15 Go 14 items in 1 page(s)

Name	City	State	DUNS	Type	Options
Abilene Christian University	Abilene	TX	073171951	Private Institution of Higher Education	View
Adelphi University	Long Island	NY		N/A	View
Advanced Energy Systems, Inc.	Medford	NY	042903026	Small Business	View



At this point, you will be registered to the institution as an SRO. Depending on whether you chose to be the Administrative SRO/BO/AO or not, you will also have the Manage Institution and Manage Users privileges. Once you are registered as an SRO to the institution, you will have View and Manage Peer Access privileges to the Grants.gov proposal.

3.1.2.4 I Want To Register as a Point of Contact (POC) to the Institution

Follow these steps to register as a POC:

1. Enter *Proposal ID* and *Email* address.
2. Choose the *Other (Point of Contact)* option on the *Register to Institution* page. Click the **Save and Continue** button.



Register to Institution - Grants.gov Proposal

Enter proposal ID, email and choose a role to register to the institution and get view access to the proposal. If you are an SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer) (- View More)

Fields with * are required

Institution Details

* Proposal ID

* Email (as entered in Grants.gov proposal)

* Choose Role

SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer)

PI (Principal Investigator)

Other (Point of Contact)

Note *The proposal ID and email address should match the proposal ID and email address listed in the automated email sent by PAMS upon receiving the SF424 proposal, which was submitted via Grants.gov. Only one POC can register to the institution using the Grants.gov proposal information.*

3. Upon successful registration, you are taken to the *Institutions* tab in the application.

U.S. DEPARTMENT OF ENERGY | Office of Science | Portfolio Analysis And Management System

yousef | Logout

Proposals | **Institutions**

Browse | Guide Me | Tuesday 22nd May 2012 03:12:07 P.M. ET

You are here: Home » Institutions » Browse

Institutions - List

Success:
You have been successfully registered to the institution.

Register to Another Institution [Detailed View](#)

Page size: 15 | Go | 14 items in 1 page(s)

Name	City	State	DUNS	Type	Options
Abilene Christian University	Abilene	TX	073171951	Private Institution of Higher Education	View
Adelphi University	Long Island	NY		N/A	View
Advanced Energy Systems, Inc.	Medford	NY	042903026	Small Business	View

Note *At this point, you are registered to the institution as a POC. Additionally you will also be able to view the proposal.*



3.1.2.5 Register Using Institution Information

This section covers two ways to register using institution information.

I Want to Register as a PI/Other User to the Institution

1. To register to an institution using institution information, click the *I know my institution and I am here to register to the institution* link.

Register to Institution

Choose one of the options to register to an institution within PAMS. This will associate you with an institution and provide access to submissions from the institution as (+ View More)

Fields with * are required

Register to Grants.Gov Proposal

My institution has submitted a proposal in Grants.gov. I am here to register as an SRO, PI, or POC (Sponsored Research Officer, Principal Investigator, or Point of Contact).

Select the most appropriate option for you to find your Institution

I know my institution and I am here to register to the institution.

Cancel

2. Enter all mandatory information on the page and click the **Search** button. Note that fields marked by a red asterisk are mandatory. Choose the PI or Other role.

Note *The first bullet below states “Institution Name like.” The word like, as used here, means that if you are uncertain of the exact name of the institution you are searching for, you can enter a term that is similar to the name you want. For example, if you know that “Water” is part of the institution name (as in Waterfield Company or Waterman University), enter “water” in the search field and click Search. The system searches for and pulls up all institutions with “water” as part of the institution name.*

- Institution Name like: Enter the Institution Name or at least a part of it
- EIN: Enter the Employer Identification Number
- DUNS: Enter the DUNS number.

Select the most appropriate option for you to find your Institution

I know my institution and I am here to register to the institution.

* Institution Name like EIN

DUNS

* Choose Role

SRO/BO/IO (Sponsored Research Officer/Business Officer/Administrative Officer)

PI (Principal Investigator)

Other

Cancel **Search**



3. If you find your institution listed in the grid, click the **Action** link and then click the **Add me to this Institution** link.

Register to Institution

Detailed View | Search | Saved Searches

Page size: 50 | Go | 962 items in 20 page(s)

Institution	DUNS	EIN	Type	Options
Aalborg University, Aalborg, Denmark				Actions
Abilene Christian University, Abilene, TX	073171951	750851900	Private Institution of Higher Education	Actions
Acadia University, Wolfville, Canada				Actions
Adam Mickiewicz University, Poznan, Poland				Actions
Adelphi University, Long Island, NY				Actions
AGH UNIVERSITY, KRAKOW, Poland				Actions

Action
Add me to this institution

4. If you do not find your institution and have to create a new institution, click the **Cannot Find My Institution** button.

Brock University, St. Catharines, Canada | Actions

Brown University, Providence, RI | Actions

Page size: 50 | Go | 962 items in 20 page(s)

Cancel | Cannot Find My Institution

5. Enter mandatory inputs to create the institution and click the **Create Institution** button to create a new institution in PAMS. Note that fields marked by a red asterisk are mandatory.

Create Institution

Institution Information

* Institution Name

Institution Website

* Institution Type | Select One | If Other, please specify:

Sub Type | Women Owned | Socially And Economically Disadvantaged

EIN/TIN

DUNS

* State | (Required if City is specified)

* Zip Code (Lookup) | (Required if City is not specified)

Congressional District | (Example: 01)

Cancel | Create Institution



6. Upon successful registration, you are taken to the *Institutions* tab in the application.

Note *At this point, you are registered to the institution as a PI/Other User role.*

I Want to Register as an SRO User to the Institution

1. To register to an institution using institution information, click the **I know my institution and I am here to register to the institution** link.

Register to Institution

Choose one of the options to register to an institution within PAMS. This will associate you with an institution and provide access to submissions from the institution as (+ View More)

Fields with * are required

Register to Grants.Gov Proposal

My institution has submitted a proposal in Grants.gov. I am here to register as an SRO, PI, or POC (Sponsored Research Officer, Principal Investigator, or Point of Contact).

Select the most appropriate option for you to find your Institution

I know my institution and I am here to register to the institution.

Cancel

2. Input all mandatory information on the page and click the **Search** button. Note that fields marked by a red asterisk are mandatory. Choose the role as SRO.

Note *The first bullet below states “Institution Name like.” The word like, as used here, means that if you are uncertain of the exact name of the institution you are searching for, you can enter a term that is similar to the name you want. For example, if you know that “Water” is part of the institution name (as in Waterfield Company or Waterman University), enter “water” in the search field and click Search. The system searches for and pulls up all institutions with “water” as part of the institution name.*

- Institution Name like: Enter the Institution Name or at least a part of it
- EIN: Enter the Employer Identification Number
- DUNS: Enter the DUNS number.



Select the most appropriate option for you to find your Institution

I know my institution and I am here to register to the institution.

* Institution Name like EIN

DUNS

* Choose Role

SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer)

PI (Principal Investigator)

Other

3. If you find your institution listed in the grid, click the **Action** link and then click the **Add me to this Institution** link.

Register to Institution

Detailed View | Search | Saved Searches

Page size: 50 Go 962 items in 20 page(s)

Institution	DUNS	EIN	Type	Options
Aalborg University, Aalborg, Denmark			All	Actions
Abilene Christian University, Abilene, TX	073171951	750851900	Private Institution of Higher Education	Actions
Acadia University, Wolfville, Canada				Actions
Adam Mickiewicz University, Poznan, Poland				Actions
Adelphi University, Long Island, NY				Actions
AGH UNIVERSITY, KRAKOW, Poland				Actions

Action

4. If the institution you wish to register to does not have an Administrative SRO/BO/AO in PAMS, you will be prompted to register as an Administrative SRO/BO/AO for the institution.

You are here: Home » Welcome

Register to Institution

Success:

Congratulations. You are registered as an SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer) for this institution

Institution Name:North Dakota State University

EIN: 45-6002439

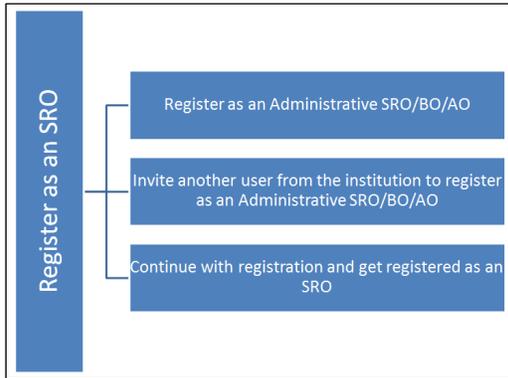
DUNS: 803882299

Are you the administrator for this institution? Do you wish to have the access to manage this institution in PAMS?

Yes. Please grant me the administrator privileges for this institution

No. I want to send an invitation to the appropriate administrator to register with PAMS.

No.



At this point, you will be presented with the following three options:

- Register to the institution as an Administrative SRO/BO/AO
- Invite another user from the institution to register as an Administrative SRO/BO/AO
- Continue with the registration process and just get registered as an SRO.

5. If you choose to register as an Administrative SRO/BO/AO, click the check box to accept the agreement and click the **Save and Continue** button. This will take you to the *Register to Institution* page.

You are here: [Home](#) » [Welcome](#)

Register to Institution

Grant Administrative Privileges

I am the designated administrator to manage this institution in PAMS. I certify that all the information provided by me on this form is true and correct.

[Cancel](#) [Save and Continue](#)

6. If you choose to invite another user to register as an Administrative SRO/BO/AO to the institution, provide all mandatory inputs on the Email page and click the **Send Email** button. Note that fields marked by a red asterisk are mandatory. This will take you to the *Register to Institution* page.

You are here: [Home](#) » [Welcome](#)

Register to Institution

Please invite the administrator for your institution to register with PAMS.

* Email ID

* First Name

* Last Name

Comments

Approximately 1 page (Max 2000 Characters); 2000 Characters left.

[Cancel](#) [Send Email](#)



7. Upon successful registration, you are taken to the *Institutions* tab.

The screenshot shows the 'Institutions - List' page in the Portfolio Analysis And Management System. At the top, there is a success message: 'Success: You have been successfully registered to the institution.' Below this is a 'Register to Another Institution' button. A table lists institutions with columns for Name, City, State, DUNS, Type, and Options. The table contains three rows of data.

Name	City	State	DUNS	Type	Options
Abilene Christian University	Abilene	TX	073171951	Private Institution of Higher Education	View
Adelphi University	Long Island	NY		N/A	View
Advanced Energy Systems, Inc.	Medford	NY	042903026	Small Business	View

8. If you do not find your institution and have to create a new institution, click the **Cannot Find My Institution** button.

This screenshot shows a portion of the 'Institutions - List' page. It displays a table with two rows of institution data. Below the table, there is a 'Cancel' button on the left and a 'Cannot Find My Institution' button on the right, which is circled in red.

9. Provide mandatory inputs to create the institution and click the **Submit** button to create a new institution in PAMS. Note that fields marked by a red asterisk are mandatory.

The screenshot shows the 'Create Institution' form. It is divided into two sections. The first section, 'Institution Information', contains fields for Institution Name, Institution Website, Institution Type (with a dropdown menu and a note 'If Other, please specify:'), Sub Type (with checkboxes for 'Women Owned' and 'Socially And Economically Disadvantaged'), EIN/TIN, and DUNS. The second section contains fields for State, Zip Code (with a 'Lookup' link), and Congressional District. The 'Create Institution' button at the bottom right is circled in red.

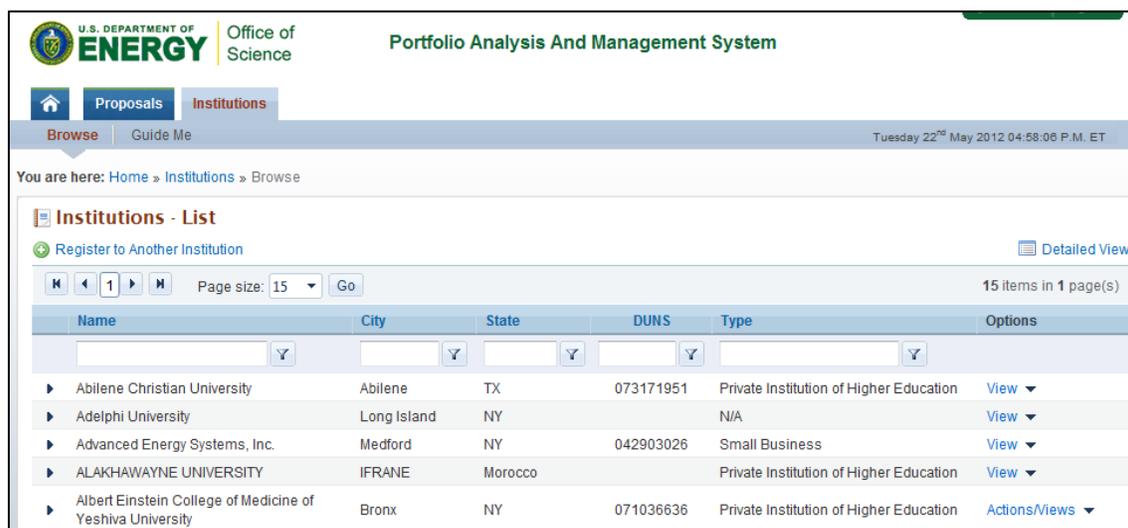


10. Upon successful registration, you are taken to the *Institutions* tab.

Note *At this point, you are registered to the institution as an SRO user. Based on your search results, you may or may not have created a new institution in PAMS.*

3.1.2.6 Register to Multiple Institutions

If you are associated with more than one institution, you can simply go to your *Institutions* tab, click **Register to Another Institution** to search for your institution, and register to it in PAMS. This might be required when a user is associated with an institution and has a small business or when a user is associated with a lab and with a university etc.



3.2 Manage Institutions

This section explains the PAMS Manage Institution functionality

3.2.1 Who Can Become an Administrator for an Institution?

- When you register as an SRO to an institution that does not yet have an Administrative SRO, you will be presented with the option to become an Administrative SRO for that institution. Upon selecting this option, you are granted administrative privileges for that institution.
- All other users have to be granted administrative privileges by users who already have them.

3.2.2 What Are Administrative Privileges? What Can I Do with Them?

The two types of administrative privileges are as follows:

- **Manage Institution Profile:** Users with this privilege can edit institution profile information in PAMS.



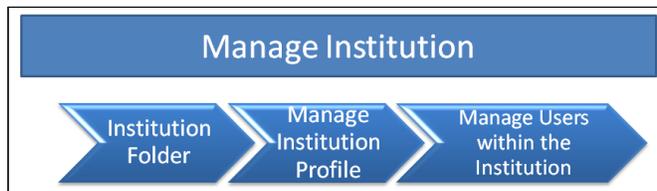
- **Manage Users:** Users with this privilege can grant or revoke privileges and peer access for other users registered to the institution. These users can also remove other registered users from the institution.

3.2.3 How Can I Manage Privileges?

- Manage Privileges is the concept of allowing select users to manage the Institution Profile, as well as users registered to the institution.
- Privileges can be managed at an institution level for users.
- Privileges can be managed only for users who are registered to the same institution.
- SRO users who have registered to PAMS via a Grants.gov proposal receive these privileges by default. Other users can be granted these privileges by users who already have the Manage Users privilege.

3.2.4 What Is Peer Access? How Does It Work?

- Peer Access is the concept of allowing select users, who are registered to the institution, to access submissions in PAMS.
- Peer Access can be managed at a submission level, by the users who create the submissions, from the *My Proposals*, *My Preproposals*, and *My Letters of Intent* pages.
- Peer access can also be managed at an institution level, from the Institution Folder, by users who have administrative privileges.
- Peer Access can be extended only to users who are registered to the same institution.



Manage Institution includes the following functionalities in PAMS:

- Institution Folder
- Manage Institution Profile
- Manage Users within the Institution.

3.2.5 Institution Folder

The institution folder is your one-stop shop for all activities associated with the institution. You can:

- Manage the Institution Profile
- Manage Users from the Institution
- Manage Your Submissions.

Follow the steps below to access the Institution Folder:

1. Login to PAMS using your credentials. Click the *Institutions* tab.



The screenshot shows the 'Portfolio Analysis And Management System' interface. The 'Institutions' tab is highlighted with a red circle. Below the navigation bar, the breadcrumb path is 'Home > Institutions > Browse'. The main content area is titled 'Institutions - List' and includes a 'Register to Another Institution' link and a 'Detailed View' link. A table lists 15 institutions with columns for Name, City, State, DUNS, Type, and Options. The 'Options' column for the last institution, 'Albert Einstein College of Medicine of Yeshiva University', shows 'Actions/Views'.

Name	City	State	DUNS	Type	Options
Abilene Christian University	Abilene	TX	073171951	Private Institution of Higher Education	View
Adelphi University	Long Island	NY		N/A	View
Advanced Energy Systems, Inc.	Medford	NY	042903026	Small Business	View
ALAKHAWAYNE UNIVERSITY	IFRANE	Morocco		Private Institution of Higher Education	View
Albert Einstein College of Medicine of Yeshiva University	Bronx	NY	071036636	Private Institution of Higher Education	Actions/Views

2. The *Institutions* tab displays all the institutions you are registered to. Choose the institution, click the **Actions/Views** link, and then click **Institution Folder**.

This screenshot shows a closer view of the 'Institutions - List' table. The 'Options' column for the first institution, 'ACENT Laboratories LLC', is expanded to show a dropdown menu. The 'Institution Folder' option is highlighted with a red circle. Other options in the menu include 'View Profile', 'Proposals', 'Letter of Intent', and 'Preproposals'.

Name	City	State	DUNS	Type	Options
ACENT Laboratories LLC	Manorville	NY	804033277	Small Business (N/A)	View Institution Folder View Profile Proposals Letter of Intent Preproposals
Advanced Magnel Laboratory, Inc.	Palm Bay	FL	943748681	Small Business (N/A)	
Air Force Research Laboratory	Kirtland AFB	NM	027292023	Other Federal Agency	
Air Force Research Laboratory	Kirtland AFB	NM	027292023	Other Federal Agency	
Alabama A&M University	Normal	AL	079121448	Historically Black Colleges and Universities (HBCUs)	

3. To manage an institution's profile, go to the *Institutions* section. To manage submissions, go to the *Submissions* section.



Institution Folder

Albert Einstein College of Medicine of Yeshiva University, Bronx, NY

DUNS: 071036636 EIN: 131624225 Institution Type: Private Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): User, Bahia

Institutions

Users	Manage Users
Profile	Update Profile

Submissions

Letter of Intent	Work on Letters of Intent	View Submitted Letters of Intent
Preproposal	Work on Preproposals	View Submitted Preproposals
Proposals	Work on Proposals	View Submitted Proposals

3.2.5.1 Manage Institution Profile

You can view/update the institution profile in PAMS. Editing the institution profile requires you to have the Manage Institution privilege for the institution. If you registered to PAMS as the Administrative SRO/BO/AO, you will be assigned these privileges by default. If you do not have Manage Institution privileges, you will only be able to view the institution profile. Follow the steps below to view or edit the institution profile:

1. If you have Manage Institution privileges, click the **Update Profile** link. Otherwise, click **View Profile**.

Institution Folder

Albert Einstein College of Medicine of Yeshiva University, Bronx, NY

DUNS: 071036636 EIN: 131624225 Institution Type: Private Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): User, Bahia

Institutions

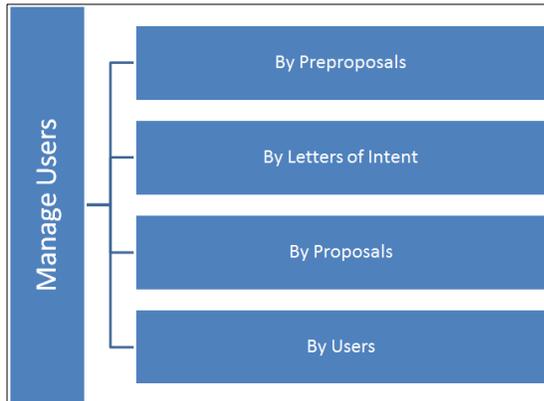
Users	Manage Users
Profile	Update Profile

Submissions

Letter of Intent	Work on Letters of Intent	View Submitted Letters of Intent
Preproposal	Work on Preproposals	View Submitted Preproposals
Proposals	Work on Proposals	View Submitted Proposals



Note *Managing users requires you to have the Manage Users privilege. If you have not been granted this privilege, you will not be able to do any of the following Manage actions in PAMS.*



Users in PAMS can be managed at the following levels:

- By Preproposals
- By Letters of Intent
- By Proposals
- By Users.

Follow the steps below to be able to view/manage users:

1. If you have the Manage Users privilege, click the **Manage Users** link to proceed.

Institution Folder		
Albert Einstein College of Medicine of Yeshiva University, Bronx, NY		
DUNS: 071036636	EIN: 131624225	Institution Type: Private Education
Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): User, Bahia		
Institutions		
Users	Manage Users	
Profile	Update Profile	
Submissions		
Letter of Intent	Work on Letters of Intent	View Submitted Letters of Intent
Preproposal	Work on Preproposals	View Submitted Preproposals
Proposals	Work on Proposals	View Submitted Proposals

2. To manage a user in PAMS, you must first search for the user. If you wish to manage a user at the institution level, click the icon  next to *By Users*. Provide inputs for first name and last name. Click the **Search** button.



Manage Users

How would you like to Manage Peer Access?

By Letter of Intent

By Preproposal

By Proposal

By Users

Last Name like

First Name like

- If you wish to manage existing users, click the **Actions/Views** link and choose either the **Manage Privileges** or **Remove from Institution** link.

Manage Users - List

Albert Einstein College of Medicine of Yeshiva University, Bronx, NY

DUNS: 071036636 EIN: 131624225 Institution Type: Private Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): User, Bahia

Search

Page size: 15 Go 4 items in 1 page(s)

Name	User Name	Email	Phone Number	Role	Options
Bacha, Lina	lina	bacha2@gmail.com	703-222-2343		SRO/BO Action
Ennaciri, Youssef	youssef	yennaciri1@gmail.com	202-555-6545	PI, P	Manage Privileges Remove from Institution
Hartnet, Mike	mhartnet	test@reisis.com	455-678-6789 Ext: 56898	P	
User, Bahia	abahia	user5@gmail.com	703-729-2232		

Page size: 15 Go 4 items in 1 page(s)

- If you wish to manage users by submission, click the icon next to *By Preproposals*, *By Letters of Intent*, or *By Proposals*. Enter the Tracking Number (Preproposal ID, LOI ID, and Proposal ID) or the Project Title and click the **Search** button.

Note *The second and third bullets below state "Project Title like" and "Solicitation Number like." The word like, as used here, means that if you are uncertain of the exact project title or solicitation number you are searching for, you can enter a part of the title or number. For example, if you know that "FOA" or "DX" is part of the solicitation number (as in FOA-2-05172012 or DX-999888777), enter "FOA" or "DX" in the search field and click Search.*



- Agency Tracking Number: Enter the Proposal ID
- Project Title like: Enter the Project Title or at least a part of it
- Solicitation Number like: Enter the Solicitation Number or at least a part of it.

5. Clicking the **Search** button will take you to a page listing the submissions available in the institutions.

Tracking Number	Title	Institution	Status	Options
PRE-000000325	PREPROPOSAL CONCURRENCY CHECK 7	Albert Einstein College of Medicine of Yeshiva University, Bronx, NY	In Progress	Actions
PRE-000000303	Preproposal title capacity check ,15 boulevard15 boulevard planet earth , 15 boulevard planet earth ,	Albert Einstein College of Medicine of Yeshiva University, Bronx, NY	Submitted to DOE	Act Manage Peer Access
PRE-000000291	TEST PROPOSAL DUE DATE IN PREPROPOSAL RECOMMENDATION	Albert Einstein College of Medicine of Yeshiva University, Bronx, NY	Submitted to DOE	Actions

6. Click the **Action** link against the submission. If you have Manage User privileges, click the **Add/Update Users** link. Otherwise, click the **View Users** link. You will be able to view a list of all users who have access to the submission. In case you wish to add more users from the institution to the submission, click the **Add New Person** link.



Manage Peer Access - User List

The users with access to this Preproposal are listed below. To filter, enter the data in the textboxes below the column headings and click the filter icon. To search, click the Search link above the grid. Click the arrow in the Options column to see all available actions. Click the Add New Person link above the grid to add a new person.

PRE-000000325: PREPROPOSAL CONCURRENCY CHECK 7 Status: In Progress

[Add New Person](#) [Search](#)

Page size: 15 2 items in 1 page(s)

Name	User Name	Email	Phone Number	Role	Options
Ennaciri, Youssef	youssef	yennaciri1@gmail.com	202-555-6545	PI, Point of Contact, SRO/BO	Actions
User, Bahia	abahia	user5@gmail.com	703-729-2232	PI, SRO/BO	Actions

Page size: 15 2 items in 1 page(s)

- If you know the first name, last name, or username of the new person, search for the user within PAMS by entering one or more of those inputs and clicking the **Search** button. Choose a user and click the **Actions** link. Then click the **Add User** link.

Manage Peer Access - Add User

PRE-000000325: PREPROPOSAL CONCURRENCY CHECK 7 Status: In Progress

[Search](#)

Page size: 15 2 items in 1 page(s)

Name	User Name	Email	Phone Number	Role	Options
Bacha, Lina	lina	bacha2@gmail.com	703-222-2343	SRO/BO	Actions
Hartnet, Mike	mhartnet	test@reisis.com	455-678-6789 Ext: 56898	PI, SRO/BO	Action

Page size: 15 2 items in 1 page(s)

Action
[Add User](#)

- Once the user is added, you need to select the appropriate peer access option(s) and click the **Save and Continue** button.



Manage Peer Access - User

PRE-0000000325: PREPROPOSAL CONCURRENCY CHECK 7 Status: In Progress

User Information

Name	Lina Bacha
------	------------

Update Peer Access

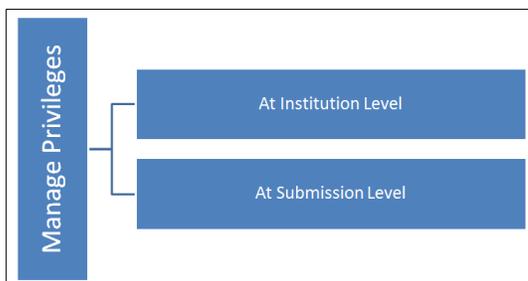
- View
- Edit
- Submit
- Manage Peer Access

Cancel Save and Continue

Note You can only add users who are already registered to the institution.

3.2.6 Manage Users

Note Managing users requires you to have the Manage Users privilege at the institution or submission level. If you do not have this privilege, you will not be able to do any of the following Manage actions in PAMS.



Users can be managed at two levels:

- Institution Level (Privileges)
- Submission Level (Peer Access)

1. To manage privileges at the institution level, go to the **Manage Users** link, click the *By Users* link, and click the **Search** button.
2. Against the user record, click **Action** and then click the **Manage Privileges** link.



Manage Users - List

Albert Einstein College of Medicine of Yeshiva University, Bronx, NY

DUNS: 071036636 EIN: 131624225 Institution Type: Private Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer):
User, Bahia

Search

Page size: 15 Go 4 items in 1 page(s)

Name	User Name	Email	Phone Number	Role	Options
Bacha, Lina	lina	bacha2@gmail.com	703-222-2343	SRO/BO	Actions: Manage Privileges, Remove from Institution
Ennaciri, Youssef	youssef	yennaciri1@gmail.com	202-555-6545	PI, Po	
Hartnet, Mike	mhartnet	test@reisis.com	455-678-6789 Ext: 56898	PI	
User, Bahia	abahia	user5@gmail.com	703-729-2232		

Page size: 15 Go 4 items in 1 page(s)

Cancel

3. Check/uncheck the privileges to be assigned to the user and click the **Save and Continue** button.

Manage User Privileges

Albert Einstein College of Medicine of Yeshiva University, Bronx, NY

DUNS: 071036636 EIN: 131624225 Institution Type: Private Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer):
User, Bahia

User Information

Name: Lina Bacha

Role: PI, Point of Contact, SRO/BO

Update Privileges  Manage Institution Profile
 Manage Users

Cancel **Save and Continue**

4. To manage peer access at the submission level, go to the **Manage Users** link and click the *By Preproposals*, *By Letters of Intent*, or *By Proposals* link—based on the submission—and click **Search**.

Note *The third bullet below states “Solicitation Number like.” The word like, as used here, means that if you are uncertain of the exact solicitation number you are searching for, you can enter a part of the number. For example, if you know that “FOA” or “DX” is part of the number (as in FOA-2-05172012 or DX-999888777), enter “FOA” or “DX” in the search field and click Search.*

- Tracking Number: Enter the LOI Number or the Preproposal Number
- Agency Tracking Number: Enter the Proposal ID
- Solicitation Number like: Enter the Solicitation Number or at least a part of it.



Manage Users

How would you like to Manage Peer Access?

By Letter of Intent

Tracking Number

Project Title like

Solicitation Number like

By Preproposal

By Proposal

By Users

Manage Users

How would you like to Manage Peer Access?

By Letter of Intent

By Preproposal

Tracking Number

Project Title like

Solicitation Number like

By Proposal

By Users

Manage Users

How would you like to Manage Peer Access?

By Letter of Intent

By Preproposal

By Proposal

Agency Tracking Number Grants.gov Tracking Number

Project Title like

Solicitation Number like

By Users

Note *You can manage submission-level peer access from the My Preproposals, My Letters of Intent, and My Proposals pages also.*

- From the submission list page, select your submission, click **Actions** and click **Manage Peer Access**. From the users list page, click **Actions** and then click **Manage Peer Access**. Click the **Remove From** link to remove all access from the submission.



Page size: 15 Go 3 items in 1 page(s)

Tracking Number	Title	Institution	Status	Options
PRE-0000000325	PREPROPOSAL CONCURRENCY CHECK 7	Albert Einstein College of Medicine of Yeshiva University, Bronx, NY	In Progress	Actions
PRE-0000000303	Preproposal title capacity check , 15 boulevard planet earth , 15 boulevard planet earth ,	Albert Einstein College of Medicine of Yeshiva University, Bronx, NY	Submitted to DOE	Action Manage Peer Access
PRE-0000000291	TEST PROPOSAL DUE DATE IN PREPROPOSAL RECOEMMENDATION	Albert Einstein College of Medicine of Yeshiva University, Bronx, NY	Submitted to DOE	Actions

Page size: 15 Go 3 items in 1 page(s)

+ Add New Person Search 3 items in 1 page(s)

Name	User Name	Email	Phone Number	Role	Options
Bacha, Lina	lina	bacha2@gmail.com	703-222-2343	PI, Point of Contact, SRO/BO	Actions
Ennaciri, Youssef	youssef	yennaciri1@gmail.com	202-555-6545	PI, Point of Contact	Action Remove From Preproposal
User, Bahia	abahia	user5@gmail.com	703-729-2232	P	

Page size: 15 Go 3 items in 1 page(s)

Note *You cannot manage peer access or privileges for yourself. You can only manage other users in PAMS.*

3.2.7 Remove from Institution

Follow the steps below to remove a user from the institution:

1. From the *Institution Folder*, identify the user to be removed by clicking the **Manage Users** link, the *By Users* link, and the **Search** button.
2. Click **Actions** and then click **Remove from Institution** to remove the user from the institution.



Manage Users - List

Albert Einstein College of Medicine of Yeshiva University, Bronx, NY

DUNS: 071036636 EIN: 131624225 Institution Type: Private Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer):
User, Bahia

Search

Page size: 15 Go 4 items in 1 page(s)

Name	User Name	Email	Phone Number	Role	Options
Bacha, Lina	lina	bacha2@gmail.com	703-222-2343	SRO/BO	Actions: Manage Privileges
Ennaciri, Youssef	youssef	yennaciri1@gmail.com	202-555-6545	PI, Po	Remove from Institution
Hartnet, Mike	mhartnet	test@reisis.com	455-678-6789 Ext: 56898	PI	
User, Bahia	abahia	user5@gmail.com	703-729-2232	SRO/BO	

Page size: 15 Go 4 items in 1 page(s)

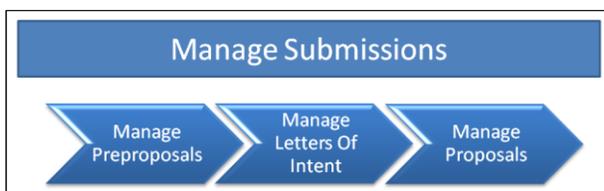
Cancel

Note *Once a user has been removed from an institution, he/she cannot be added back through PAMS. The user needs to contact the PAMS Helpdesk staff to be added back to the institution. Call (301) 903-5313 or email PAMS-Helpdesk@science.doe.gov.*

3.3 Manage Submissions

Submissions in PAMS include the following:

- Proposals
- Preproposals
- Letters of Intent



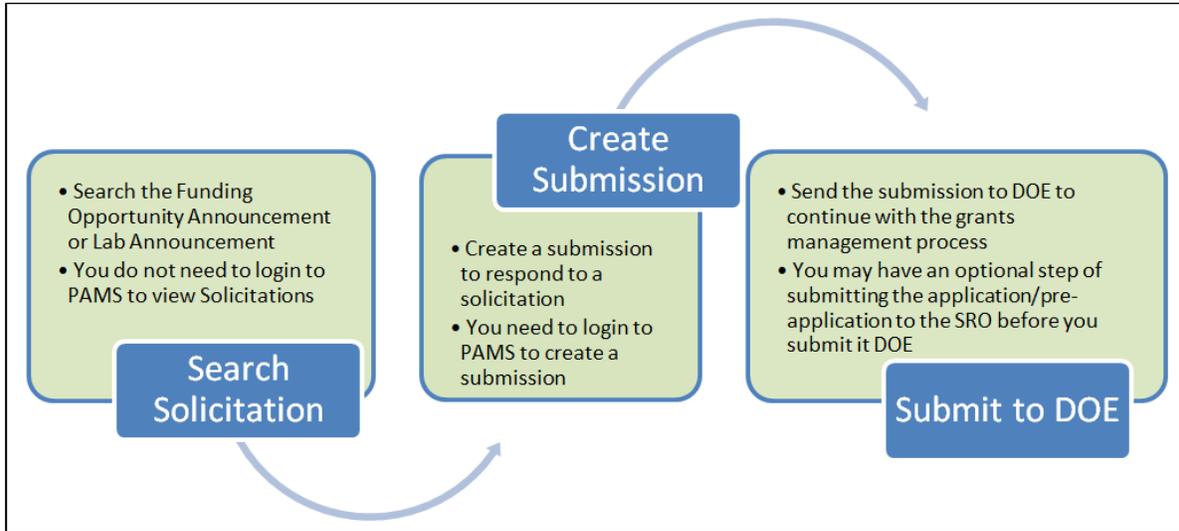
You can use PAMS to manage submissions as follows:

- Create/Edit/Delete/Submit Submissions
- View Submissions created by other users of the institution (provided you have access).



3.3.1 How Do I Respond to a Solicitation?

Responding to a solicitation could be through either a Preproposal or a formal Proposal. The flow below summarizes the process for responding to a solicitation:

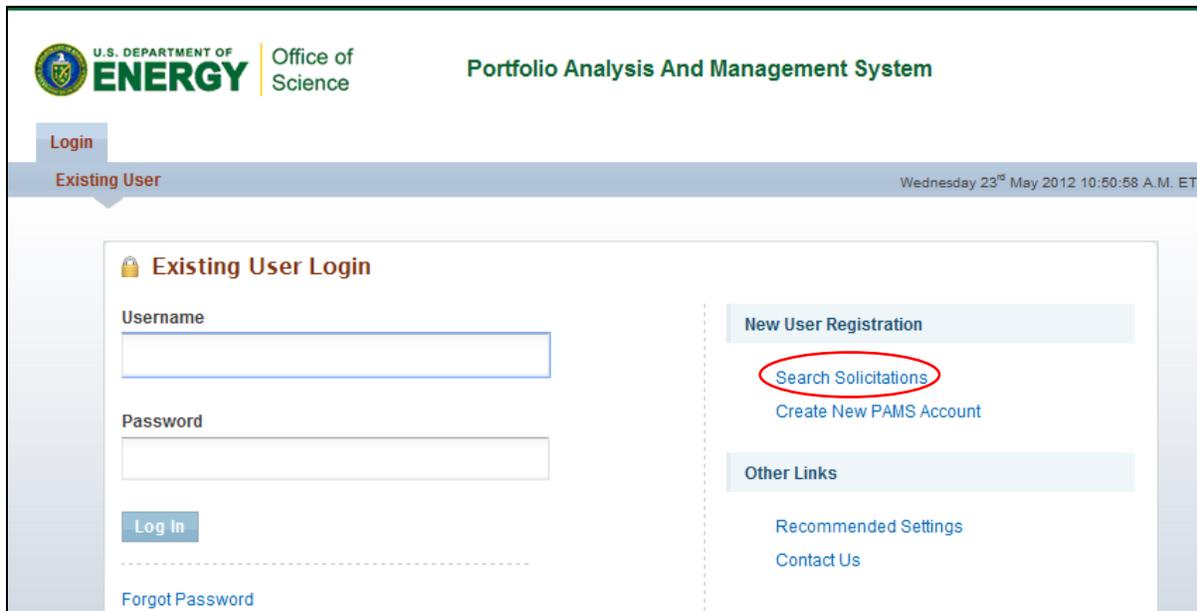


3.3.2 How Do I Search Solicitations?

The first step in managing submissions is to identify the solicitation. Once the solicitation is identified, you can respond with the appropriate submission requested.

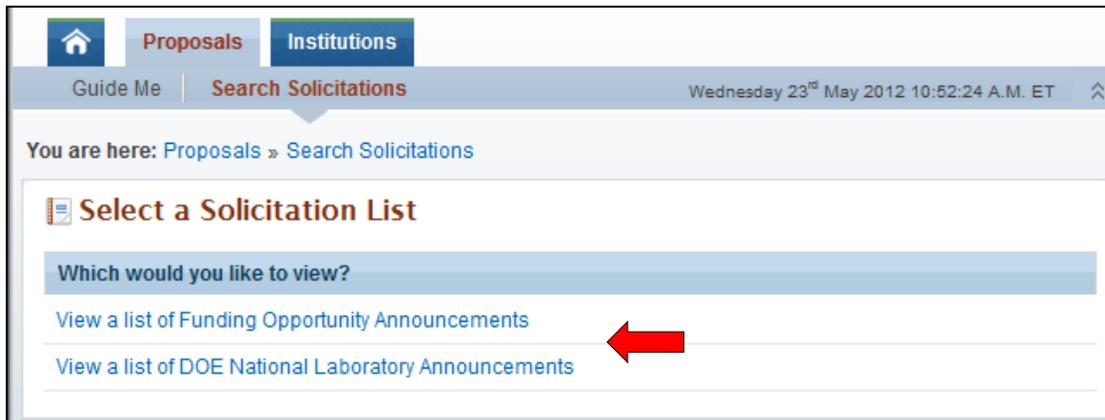
3.3.3 I Am Not Logged in to PAMS

1. On the login page of PAMS, click the **Search Solicitations** link. The link is located under *New User Registration* on the right side of the page.



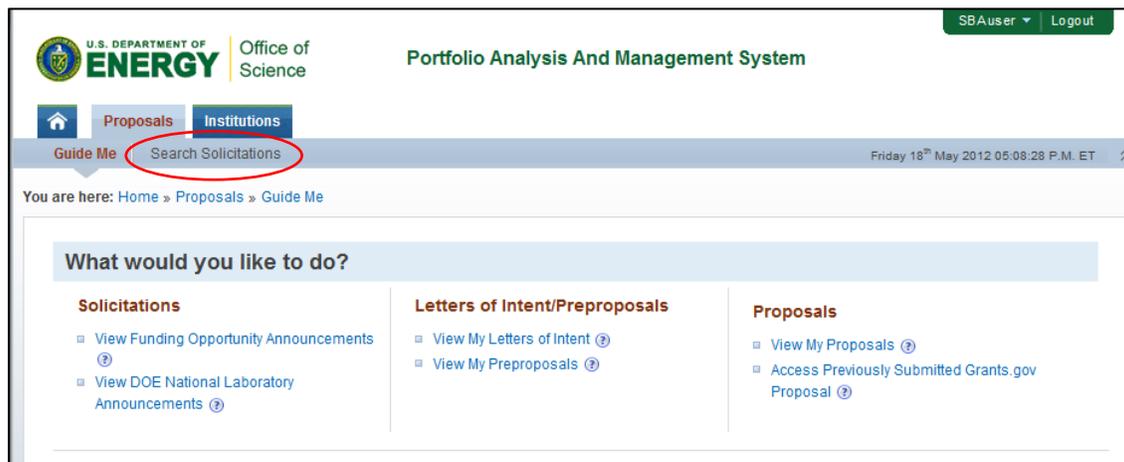


2. Choose an appropriate solicitation list. You can view the Funding Opportunity Announcements by clicking the **View a list of Funding Opportunity Announcements** link, or you can view Lab Announcements by clicking the **View a list of DOE National Laboratory Announcements**.



3.3.4 I Am Logged in to PAMS

1. Click the **Proposals** tab and then click the **Search Solicitations** link.



2. Choose the solicitation list. You can view the Funding Opportunity Announcements by clicking the **View a list of Funding Opportunity Announcements** link, or you can view Lab Announcements by clicking the **View a list of DOE National Laboratory Announcements**.



Home | **Proposals** | Institutions

Guide Me | **Search Solicitations** | Wednesday 23rd May 2012 10:52:24 A.M. ET

You are here: [Proposals](#) » [Search Solicitations](#)

Select a Solicitation List

Which would you like to view?

- [View a list of Funding Opportunity Announcements](#)
- [View a list of DOE National Laboratory Announcements](#)

Once you have identified the solicitation of interest, you can create a submission to respond to it.

3.3.4.1 Create and Submit a Preproposal

Follow the steps below to create and submit a Preproposal:

1. Click the **Actions/Views** link and then click the **Submit Preproposal** link.

Funding Opportunity Announcements - List

The existing FOAs are listed below. To filter, enter the data in the textboxes below the column headings and click the filter icon. To search, click the Search link above (- [View More](#))

Detailed View | Search

Page size: 15 | Go | 119 items in 8 page(s)

Solicitation Number	Solicitation Title	LOI/Preproposal Due Date	Proposal Due Date	Options
DE-FOA-PPTest4576	High Energy Density Laboratory Plasmas	12/21/2012 11:59:59 PM	12/31/2012 11:59:59 PM	Action/Views
DE-FOA-PPTest0932	Thermo Nuclear Research	9/12/2012 11:59:59 PM	12/19/2012 11:59:59 PM	Action View
DE-FOA-PPTest2012	Wind Energy Scientific Research	4/9/2012 4:15:00 PM	12/25/2012 11:59:59 PM	Solicitation
DE-FOA-PPTest1989	Physical Chemistry Advanced Research	7/27/2012 11:59:59 PM	12/31/2012 11:59:59 PM	Views
DE-FOA-PPTest0873	Advanced Research in Biological Systems	9/4/2012 11:59:59 PM	12/31/2012 11:59:59 PM	
DE-FOA-XZ0011230	Combined Fusion Energy Science		2/28/2013 5:00:00 PM	

2. Provide the required information on the *Submit Preproposal* page. Note that fields marked by a red asterisk are mandatory. To choose a PI, click the **Select PI** button.



Submit Preproposal

Complete the form below to submit a Preproposal. Search for and add only one PI. If the PI is not registered, send an invitation to the PI to register to the Institution (+ View More)

Solicitation Information
Solicitation Number: DE-FOA-PPTest4576: High Energy Density Laboratory Plasmas
* Institution: Select One

*** PI Information** ? Select PI
Name: N/A
Email Address: N/A
Phone Number: N/A
Address: N/A

Project Information
* Preproposal Title:
* Program Manager: Select One

Preproposal (Maximum 1) Attach File
No documents attached

Cancel Save Submit to DOE

3. Search for the PI using the search criteria. Click the **Action** link against the PI record and then click **Select PI**. If the PI is not registered to the institution in PAMS, click the **Invite PI** link.

Select PI

Invite PI Search | Saved Searches

Page size: 15 Go 5 items in 1 page(s)

Name	User Name	Email	Phone	Options
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Ennaciri, cbahia	cbahia	cbahia@gmail.com	703-729-7654	Action
Ennaciri, Elias	elias	ennaciri01@gmail.com	703-999-8767	Action
Smith, Jane	extuser02	reitester2@gmail.com	546-546-4564 Ex	Action
Arias, Lynette	larias	larias@gmail.com	476-457-8907 Ext: 67980	Action
Ennaciri, Youssef	youssef	yennaciri1@gmail.com	202-555-6545	Action

Page size: 15 Go 5 items in 1 page(s)

Cancel



4. Complete the form by entering the required information. Note that fields marked by a red asterisk are mandatory. Click **Attach File** and select your file. Click the **Attach** button to attach the Preproposal document. Click **Save** to save the document in the *My Preproposals* list page for later completion. Click **Submit to DOE** to submit the Preproposal.

Submit Preproposal

Complete the form below to submit a Preproposal. Search for and add only one PI. If the PI is not registered, send an invitation to the PI to register to the Institution ([+ View More](#))

Solicitation Information

Solicitation Number DE-FOA-PPTest4576: High Energy Density Laboratory Plasmas

* Institution Abilene Christian University, Abilene, TX

*** PI Information ?** Change PI

Name Ennaciri, cbahia

Email Address cbahia@gmail.com

Phone Number 703-729-7654

Address 12345 cbahia street, Ashburn, VA 20147

Project Information

* Preproposal Title

* Program Manager Select One

Preproposal (Maximum 1) Attach File

No documents attached

Cancel Save Submit to DOE

3.3.4.2 Create and Submit a Letter of Intent

Follow the steps below to create and submit a Letter of Intent:



1. Click the **Actions/Views** link and then click the **Submit Letter of Intent** link.

Funding Opportunity Announcements - List

The existing FOAs are listed below. To filter, enter the data in the textboxes below the column headings and click the filter icon. To search, click the Search link above (+ View More)

Filters Applied (X Clear)

Page size: 15 Go 1 items in 1 page(s)

Solicitation Number	Solicitation Title	LOI/Preproposal Due Date	Proposal Due Date	Options
DE-FOA-LOITest789	Low Solar research	5/31/2012 11:59:59 PM	9/28/2012 11:59:59 PM	Actions/Views

Submit Letter of Intent

2. Provide the required information on the *Submit Letter of Intent* page. To choose a PI click the **Select PI** button.

Submit Letter of Intent (LOI)

Complete the form below to submit a Letter of Intent (LOI). Search for and add only one PI. If the PI is not registered, send an invitation to the PI to register to the (+ View More)

Solicitation Information

Solicitation Number: DE-FOA-LOITest789: Low Solar research

* Institution: Adelphi University, Long Island, NY

* PI Information **Select PI**

Name: N/A

Email Address: N/A

Phone Number: N/A

Address: N/A

Project Information

* Letter of Intent Title: [Text Box]

* Program Manager: Select One

Letter of Intent (Maximum 1) Attach File

No documents attached

Cancel Save **Submit to DOE**



3. Search for the PI using the search criteria. Click the **Action** link against the PI record and then click **Select PI**. If the PI is not registered to the institution in PAMS, click the **Invite PI** link.

The screenshot shows the 'Select PI' interface. At the top left, there is a '+ Invite PI' button. To the right, there are search and saved searches options. Below this is a pagination bar with 'Page size: 15' and 'Go' buttons, and '4 items in 1 page(s)'. The main part of the interface is a table with the following columns: Name, User Name, Email, Phone, and Options. The table contains four rows of data:

Name	User Name	Email	Phone	Options
Smith, Karen	extuser1	reitester155@gmail.com	703-222-2222	Actions
Bennani, Kawtar	kbennani	bennani@gmail.com	202-204-7654	Action
User, REI	REIUser	reitester3@gmail.com	703-480-9678	Actions
Ennaciri, Youssef	youssef	yennaciri1@gmail.com	202-555-6545	Actions

The 'Action' dropdown menu for the second row is open, showing 'Select PI' circled in red. At the bottom left, there is a 'Cancel' button. The pagination bar at the bottom also shows 'Page size: 15' and 'Go' buttons, and '4 items in 1 page(s)'.

4. Complete the form by entering the required information. Note that fields marked by a red asterisk are mandatory. Click **Attach File** and select your file. Click the **Attach** button to attach the Letter of Intent document. Click **Save** to save the document in the *My Letters of Intent* list page for later completion. Click **Submit to DOE** to submit the Letter of Intent.



Submit Letter of Intent (LOI)

Complete the form below to submit a Letter of Intent (LOI). Search for and add only one PI. If the PI is not registered, send an invitation to the PI to register to the (+ View More)

Solicitation Information

Solicitation Number: DE-FOA-LOITest789: Low Solar research

* Institution: Adelphi University, Long Island, NY

* PI Information ? Change PI

Name: Smith, Karen

Email Address: reitester155@gmail.com

Phone Number: 703-222-2222

Address: PO BOX 12345 20151

Project Information

* Letter of Intent Title:

* Program Manager: Select One

Letter of Intent (Maximum 1) Attach File

No documents attached

Cancel Save Submit to DOE

3.3.4.3 Create and Submit a Proposal

You can submit a proposal in PAMS only in response to DOE National Laboratory Announcements. For Funding Opportunity Announcements, proposals must be submitted through Grants.gov only. Follow the steps below to create and submit a proposal:

1. Search for DOE National Laboratory Announcements from the *Search Solicitations* tab. Click the **Actions/Views** link for a Solicitation and then click the **Submit Proposal** link.

DOE National Laboratory Announcements - List

Detailed View | Search

Filters Applied (x Clear)

Page size: 15 | Go | 1 items in 1 page(s)

Solicitation Number	Solicitation Title	LOI/Preproposal Due Date	Proposal Due Date	Options
LAB 09-24				
LAB 09-24	Topical Collaborations in Nuclear Theory	4/9/2012 4:36:00 PM	5/31/2012 11:59:59 PM	Actions/Views

Page size: 15 | Go

Action

Submit Proposal

View

Lab Announcement



2. Provide the required input information on the *Cover Page* (fields marked by a red asterisk are mandatory), choose the save options, and click **Go** to start working on the *Budget* section.

✓ Cover Page ✓ Budget ✓ Subawards (optional) ✗ Attachments

Fields with * are required

Solicitation Information

Solicitation Number: TA-SoI-LOI-223451: TA-SoI-LOI-223451

* Institution:

* Principal Investigator Information ? Change PI

Name: Rick, Hello

Position/Title of PI:

Phone Number: 123-456-7897

Email Address: reitester1120211@gmail.com

Address: HC 908 BOX 1235, Herndon, VA 20175

Project Information

* Proposal Title:

* Program Manager:

* Proposal Type:

Field Work Proposal Number (if applicable) ?

FWP Information		
#	FWP Number	Target Year
1.	555555555555	2013



Research and Other Related Project Information

*** 1. Are Human Subjects Involved?**

Yes No

1a. If Yes, is the project exempt from Federal regulations? *(Required only if the answer to question 1 is 'Yes')*

Yes No N/A

If Yes, check appropriate exemption number. *(Required only if the answer to question 1a is 'Yes')*

1 2 3 4 5 6 N/A

If No, is the IRB review pending? *(Required only if the answer to question 1a is 'No')*

Yes No N/A

IRB Approval Date:

Human Subject Assurance Number:

*** 2. Are vertebrate animals used?**

Yes No

2a. If Yes, is the IACUC review pending? *(Required only if the answer to question 2 is 'Yes')*

Yes No N/A

IACUC Approval Date:

Animal Welfare Assurance Number:

Cancel Choose Action

3. On the *Budget* page, provide the necessary information for each year (fields marked by a red asterisk are mandatory). Complete each section by clicking the icon against each section. Choose the appropriate save option and click **Go** to continue to the next section.

Cover Page Budget Grants/Awards (optional) Attachments

[Add Budget Period](#)

Budget Period	Start Date	End Date	Delete Period
1	Not Provided	Not Provided	
2	Not Provided	Not Provided	<input type="button" value="Delete"/>

Period 1 | **Period 2** | Budget Summary

[Budget Tab Instructions](#)

Budget Period Information

* Budget Period Start Date: Not Provided

* Budget Period End Date: Not Provided

A. Senior/Key Person

#	Name	Project Role	Months	Requested Salary (\$)	Fringe Benefits (\$)	Funds Requested (\$)
Total Senior/Key Person						Not Provided



When entering budget information for multiple budget periods, simply click the Copy From Previous Period link (which appears in the screenshot immediately above) to copy data over from the previous period. This will eliminate you having to duplicate budget information for every year; you will merely have to edit the information after copying it over.

B. Other Personnel					
# of Personnel	Project Role	Months (?)	Requested Salary(\$) (?)	Fringe Benefits (\$) (?)	Funds Requested (\$)
Total Other Personnel					Not Provided
Total Salary, Wages and Fringe Benefits (A+B)					\$0.00
C. Equipment Description					
#	Equipment Item				Funds Requested (\$)
Total Equipment					Not Provided
D. Travel					
#	Item				Funds Requested (\$)
1.	Domestic Travel Costs (Incl. Canada, Mexico, and U.S. Possessions)				Not Provided
2.	Foreign Travel Costs				Not Provided
Total Travel					\$0.00
E. Participant/Trainee Support Costs					
#	Item				Funds Requested (\$)
1.	Tuition/Fees/Health Insurance				Not Provided
2.	Stipends				Not Provided
3.	Travel				Not Provided
4.	Subsistence				Not Provided
5.	Other				Not Provided
Number of Participant/Trainees (Not Provided)					
Total Participant/Trainee Support Costs					\$0.00
F. Other Direct Costs					
#	Item				Funds Requested (\$)
1.	Materials and Supplies				Not Provided
2.	Publication Costs				Not Provided
3.	Consultant Services				Not Provided
4.	ADP/Computer Services				Not Provided
5.	Subawards/Consortium/Contractual Costs				Not Provided
6.	Equipment or Facility Rental/User Fees				Not Provided
7.	Alterations and Renovations				Not Provided
8.	Other				Not Provided
Total Other Direct Costs					\$0.00



G. Direct Costs		Total Other Direct Costs	\$0.00
#	Item	Funds Requested (\$)	
1.	Total Direct Costs (A thru F)	\$0.00	

H. Other Indirect Costs		Total Indirect Costs	Not Provided
#	Item	Funds Requested (\$)	
Total Indirect Costs			

I. Total Direct and Indirect Costs		Total Indirect Costs	Not Provided
#	Item	Funds Requested (\$)	
1.	Total Direct and Indirect Costs (G+H)	\$0.00	

Back Choose Action Go

4. Use the **Subawards** tab only if you are submitting separate budgets for subawards. If not, please ignore this section and leave it blank. To provide subaward budgets:
 - a. Go to the **Subawards** tab and click the **Add Subaward** link.
 - b. Provide budget information (similar to the *Budget* page information in Step 3 above) for each subaward you wish.
 - c. When you have finished providing the necessary information, choose the appropriate save option and click **Go** to continue to the next section.

Cover Page
 Budget
 Subawards (optional)
 Attachments

DUNS	Institution	Options
No Subawards found.		

Back Choose Action Go

5. On the **Attachments** tab, upload any necessary attachments. Choose **Save Attachments** to do so. Once all sections are complete, choose **Submit to DOE** and click **Go** to submit the proposal to DOE.

Cover Page
 Budget
 Subawards (optional)
 Attachments

Attached Documents

Budget Justification Attachment (Minimum 1) (Maximum 1)				Max. 1 Allowed
Document Name	Size	Date Attached	Description	Options
Attachment for test.docx	10 kB	05/16/2012		Update Description

Proposal Attachment (Minimum 1) (Maximum 1)				Max. 1 Allowed
Document Name	Size	Date Attached	Description	Options
Attachment for test.docx	10 kB	05/16/2012		Update Description

Other Attachments (Maximum 5) Attach File

No documents attached

Back Choose Action Go

Choose Action
 Choose Action
 Save Attachments
 Submit to DOE



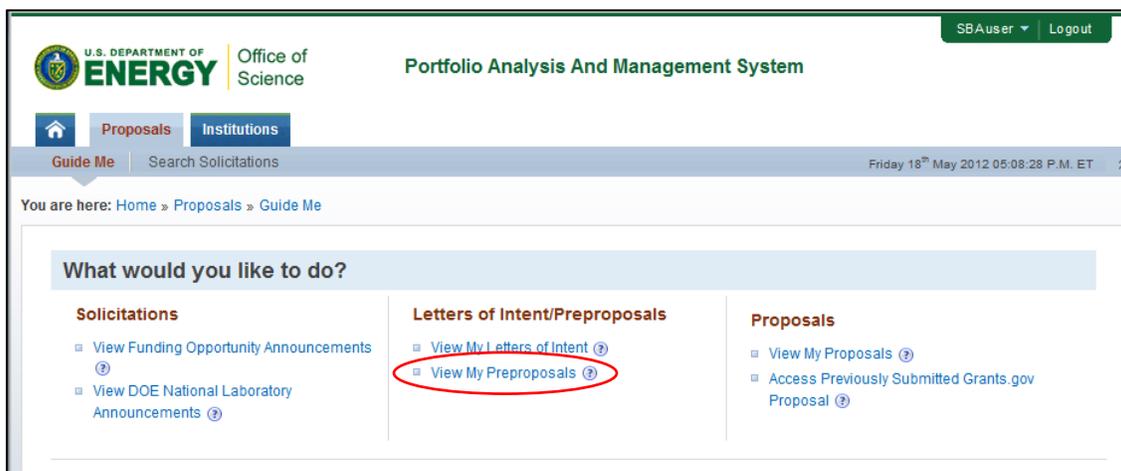
3.3.4.4 Reopen and Resubmit a Submission

Note *Once you have reopened a submission, you can modify and resubmit it to DOE. Please note, however, that once reopened, a submission will no longer be considered by DOE until you resubmit it.*

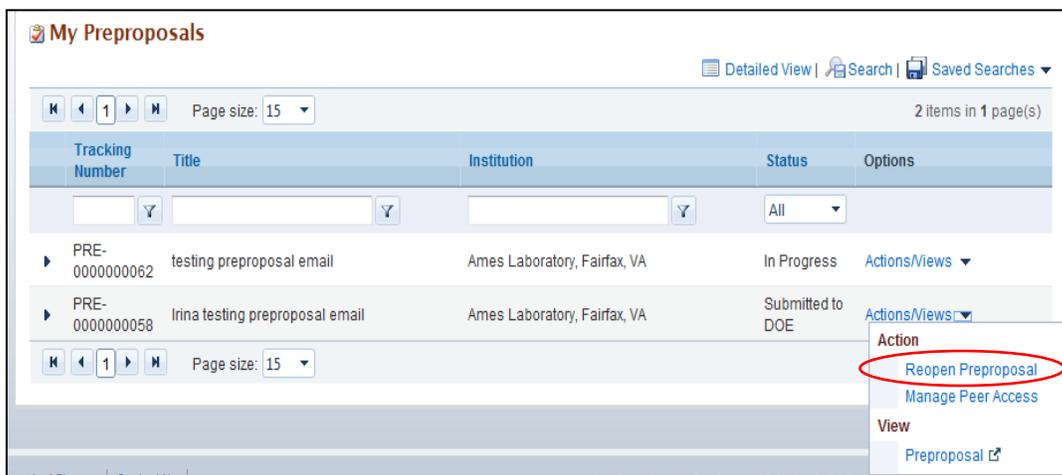
Also, once the due date has passed, you WILL NOT be able to make the resubmission to DOE.

You can reopen a submitted Preproposal, Letter of Intent, or Proposal (only for lab and interagency Proposals submitted in PAMS); modify it; and resubmit it **before the due date** of the original submission. Follow the steps below to reopen a submission:

1. Click the **Proposals** tab.
2. Click the **View My Letters of Intent**, **View My Preproposals**, or **View My Proposals** link to navigate to the respective list.



3. From the *My Letters of Intent*, *My Preproposals*, or *My Proposals* page, click the **Action** link.
4. Click the **Reopen Preproposal**, **Reopen Letter of Intent**, or **Reopen Proposal** link to reopen a submission that has already been submitted to DOE.





6. Edit the Preproposal, Letter of Intent , or Proposal, as required, and resubmit it to DOE using the options at the bottom of the page.

3.3.4.5 I Have Received an Invitation from DOE to Submit a Proposal in PAMS



This applies to National Labs and Other Federal Agencies only.

DOE can send invitations to National Labs and Interagencies to submit proposals. These invitations are sent as emails, and recipients must be registered to the institution to submit a proposal in PAMS.

A link in the email enables you to submit a proposal. Clicking this link automatically creates a proposal and takes you to the *My Proposals* page. Then proceed as follows:

1. Once you are on your *My Proposals* page, edit the *In-Progress* proposal with the title *Invite to Submit to DOE Office of Science (change me)*.
2. To edit the proposal, select **Edit Proposal** under *Actions/Views*. To allow another person to edit the proposal, you must give that person peer access by selecting **Manage Peer Access** under *Actions/Views*.
3. Refer to the [Create and Submit a Proposal](#) section of this document for detailed instructions on how to submit a proposal in PAMS.

3.3.4.6 I Want To View Submissions from My Institutions

Follow the steps below to view any submissions associated with an institution:

1. Click the **Proposals** tab
2. Click **View My Preproposals**, **View My Letters of Intent**, or **View My Proposals** to see the list of submissions.
3. Click **Actions** and then click the **View** link to view the submission.

3.3.4.7 I Want To Manage Peer Access for a Submission

Peer Access is the concept of allowing select users to access submissions in PAMS. Peer Access can be managed at a submission level, by the users who created the submissions, from the *My Proposals*, *My Preproposals*, and *My Letters of Intent* pages.

Peer access can also be managed at an institution level, from the *Institution Folder*, by users who have Administrative privileges. Peer Access can be extended only to users who are registered to the same institution. Follow the steps below to manage peer access for a submission:

1. Click the **Proposals** tab after logging in to PAMS. Click the appropriate **View** links.



U.S. DEPARTMENT OF ENERGY | Office of Science
Portfolio Analysis And Management System

Proposals | Institutions

What would you like to do?

- Solicitations**
 - View Funding Opportunity Announcements
 - View DOE National Laboratory Announcements
- Letters of Intent/Preproposals**
 - View My Letters of Intent
 - View My Preproposals
- Proposals**
 - View My Proposals
 - Access Previously Submitted Grants.gov Proposal

- This will take you to the *My Preproposals*, *My Letters of Intent*, or the *My Proposals* page. Choose a submission record, click the **Action** link, and then click the **Manage Peer Access** link.

My Preproposals

The existing Preproposals accessible to you are listed below. To filter, enter the data in the textboxes below the column headings and click the filter icon. To search, (- View More)

Preproposal Number	Title	Institution	Status	Options
PRE-000000345	Preproposal for climate science solicitation	Ames Laboratory, Ames, IA	Submitted to DOE	Actions/Views
PRE-000000336	Mundiapolis preproposal	Mundiapolis Institutions, Casablanca, Morocco	Submitted to DOE	Action View
PRE-000000334	Mundiapolis Proposal	Mundiapolis Institutions, Casablanca, Morocco	Submitted to DOE	Preproposal

- You will now be taken to the *Manage Peer Access - User List* page. Click the **Add New Person** link to add a new user registered to the institution to the submission. Click **Manage Peer Access** to manage existing user access.

Add New Person

Name	User Name	Email	Phone Number	Role	Options
Bacha, Lina	lina	bacha2@gmail.com	703-222-2343	PI, Point of Contact	Actions
Ennaciri, Youssef	youssef	yennaciri1@gmail.com	202-555-6545	PI	Action Remove From Preproposal

- Select check boxes to update peer access for users.



User Information

Name: Lina Bacha

Update Peer Access: View Manage Peer Access

Buttons: Cancel, Save and Continue

- When you click **Add User**, you are taken to list page of existing users. Choose a user record, click the **Action** link, and then click **Add User**.

Search

Page size: 15 Go 2 items in 1 page(s)

Name	User Name	Email	Phone Number	Role	Options
Hartnet, Mike	mhartnet	test@reisys.com	455-678-6789 Ext: 56898	PI, SRO/BO	Actions
User, Bahia	abahia	user5@gmail.com	703-729-2232	SRO/BO	Action

Buttons: Return To List Page

- On the *Manage Peer Access – User* page, choose the privileges to be assigned to the user and click the **Save and Continue** button.

User Information

Name: Mike Hartnet

Update Peer Access: View Manage Peer Access

Buttons: Cancel, Save and Continue

- You are taken to the *View Users – List* page, where you will see a *Success* message. The new user who was added will be displayed in the page's grid.



Note

For submissions with the status 'Submitted to DOE,' the only privileges that can be managed are View and Manage Peer Access. For 'In Progress' submissions, the following privileges can be managed :

- ***View***
- ***Edit***
- ***Delete***
- ***Submit to DOE***
- ***Manage Peer Access.***

Note

Any users with the Edit, Delete, Submit to DOE, or Manage Peer Access privilege will, by default, be assigned the View privilege. If you are the submission creator, you will be assigned all submission-level privileges by default.



4 GLOSSARY

Acronym	Definition
AO	Administrative Officer
BO	Business Officer
LOI	Letter of Intent
ET	Eastern Time
PAMS	Portfolio Analysis and Management System
PI	Principal Investigator
POC	Point of Contact
SRO	Sponsored Research Officer



5 PAMS HELPDESK CONTACT INFORMATION

If you have any questions regarding PAMS or if you have any trouble accessing your information in PAMS, please contact the PAMS Helpdesk staff as follows:

Phone	Hours of Operation	Email
(301) 903-5313	9:00 a.m.–5:00 p.m., Eastern Time (ET), Monday–Friday	PAMS-Helpdesk@science.doe.gov