

QUICK GUIDE FOR USING SPARTA

- Verify the pre-filled general budget information (questions 1 through 4) and update as needed.
- Rename the budget to help reviewers identify the Funding Proposal it supports.
- Indicate if the budget will be a Modular Budget. Choose **Yes** or **No**.
- Enter the F&A (Indirect Cost) Rate if the current negotiated federal rate is not being used. In these cases, a Budget Rate Justification is also required and should be attached at this time.
- If the sponsor does not use MTDC for F&A rate calculation, choose the F&A Type from drop-down list.
- Click **Continue**.

VERIFY AND UPDATE GENERAL BUDGET CHARACTERISTICS

- Choose **Yes or No** for both of the questions below.
 - Are trainee costs included in the budget?
 - Will the budget and proposal include Subaward or Subcontract sites?
- Choose to create the budget in detailed or summary mode. NOTE: Summary is used only when the budget does not include effort, salary or fringe benefits, and the proposal is not a Grants.gov submission.
- Click **Continue**.

COMPLETE THE PERSONNEL BUDGET GRID

- If the pre-filled information is incorrect or blank, or if the application is non-federal, update the salary cap for the calendar, academic and summer periods.
- Review and update the salary inflation rate if needed.
- Choose a number of rows to add equal to the number of individuals to be included in the budget and click **Add**. No more than 5 rows can be added at a time.
- Choose a name from the drop-down list labeled **Person**. NOTE: The person list is populated based on selections made on the Funding Proposal. If names are missing, update the Funding Proposal, Save and then complete the Personnel Budget Grid.

- Choose, type in, or review the following information for selected staff.

- Appointment period
- Role
- Key personnel (click the check box labeled **Key** for Yes)
- Salary inflation rate (applicable, Yes or No)
- Base Salary (if inflation rate applies)
- Control Account
- Display Order (1 is first, 2 is second, and so on)
- Requested Time (percentage of Effort requested as part of the proposal)
- Fringe Benefits (FB) Rate (update if submitting to non-federal sponsor)

NOTE:

If Effort and Requested effort are different, SPARTA will show the difference as part of the Cost Share Budget.

If the Salary Cap is exceeded, SPARTA will show the excess salary and fringe amounts as part of the Cost Share budget.

To add an individual to the Cost Share budget only, first add to the regular Budget Personnel Grid. Mark **Effort** at the committed percent and input 0 for **Requested**.

- Click the blue, right-facing arrow to copy budget items to all periods.
- Update budget items for each period different from Period 1.
- Review budget totals by category, period and overall.
- Add clarifying or explanatory notes when needed.
- Click **Continue**.

CHECK PROPOSAL BUDGET FOR ERRORS

- Click **Hide/Show Errors** to display a list of error messages.
- Click the **Jump to** link to navigate to an error location and correct the error.
- Click **Save** and then **Refresh**. Repeat until errors are all resolved.
- Click **Finish** to return to the Budget workspace.

QUICK GUIDE FOR USING SPARTA

This quick reference guide will get you started using SPARTA. SPARTA is the Sponsored Programs Application for Research Tracking and Administration. The guide includes:

- Getting Started page 1
- SPARTA Profile page 2
- Funding Proposals page 3
- Budget Workspace page 3

Video training for "SPARTA" is available at case.edu/sparta for SPARTA users. For a full guide and other training materials for SPARTA, please go to research.case.edu/education

For additional assistance contact the ITS Service Desk at 216.368.HELP(4357). To request training, please send an email to help@case.edu

GETTING STARTED

BROWSER TIPS

For the best experience using SPARTA, turn off your browser pop-up blocker.

If Internet Explorer is your preferred browser, make sure that the compatibility view is turned on for the SPARTA website.

LOGGING INTO SPARTA

- Type case.edu/SPARTA into your internet browser bar.
- Save as a favorite or bookmark.
- Type your CWRU ID and Password in the User Name and Password text boxes.

- Click the check box labeled **Remember me** if you would like to be automatically logged in each time you visit case.edu/SPARTA.
- Click the **Login** button.

NAVIGATING SPARTA

- Do NOT use browser controls (back, forward, refresh) to navigate within SPARTA.
- When editing a SmartForm (e.g., Funding Proposal) navigation is controlled by both the system **Back** and **Continue** buttons and the **Jump To** drop-down list.

- Primary system navigation is accomplished via hierarchal menus arranged in tabs horizontally along the top of the screen.
- Breadcrumbs provide a trail for the user to follow back to a starting or entry point within the system. Breadcrumbs are arranged like this: **Home page > Section page > Subsection page**

Grants > Proposal Number Two > 3D Imaging, LLC

- Breadcrumbs are also used in SmartForms. Icons indicate the kind of document (in this case, a budget.) Click the Breadcrumb labeled **Proposal Number Two** to access the Funding Proposal SmartForm related to the budget shown.

You Are Here: [Proposal Number Two](#) > [3D Imaging, LLC](#)

USING SEARCH/FILTER

Search or filter results using wildcard syntax. The symbol for the wildcard is a %. Examples for using the wildcard include: Contains: Prefix and suffix search term with % (e.g. math%tic) Ends with: prefix search term with % (e.g. %ent) Begins with: add % as suffix to search term (e.g. loc%)

Controlling Search Results Display

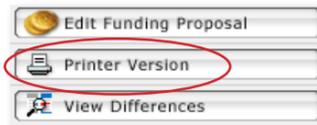
Control how much information displays on the screen at a time by changing the number of rows per page. To change, Click in the "NUMBER / page" box at the bottom of any list, and type the desired number of rows to display. The maximum rows per page is 100.

SAVE, PRINT, EXIT AND HIDE/SHOW ERRORS

- The pictured commands appear at both the top and bottom of SmartForms.
- Click **Save** to save your work on a SmartForm.
- Click **Exit** to return to a workspace screen from a SmartForm. If you click **Exit** with unsaved changes, SPARTA will prompt you to Save before exiting.

QUICK GUIDE FOR USING SPARTA

- Click **Print** to a print SmartForm you are editing or viewing
- Click **Hide/Show Errors** to open or collapse the error message window.
- Print a document from the workspace using the provided task, **Printer Version**.



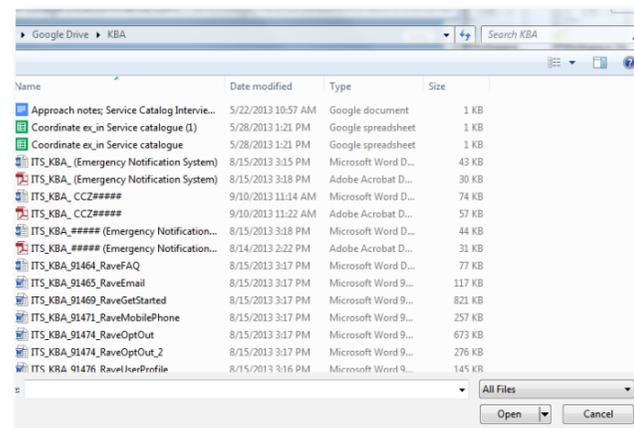
- Do NOT use browser controls or keyboard shortcuts to print unless SPARTA prompts you to do so.

ATTACH A FILE

- After clicking the prompt to add a document (ex., **Budget Rate Justification: Add**), click **Choose File**.



- A file browser will open on your computer.



- Navigate to the location of the document you want to attach.
- Click the document name once to select it and click **Open**.
NOTE: This operation may vary slightly based on your Operating System (i.e., Windows 7, Mac OS, Ubuntu 13.04, etc.)
- Type in a name for the document (optional).
- Click **OK** to add the document to SPARTA or **Cancel** to continue without changes.

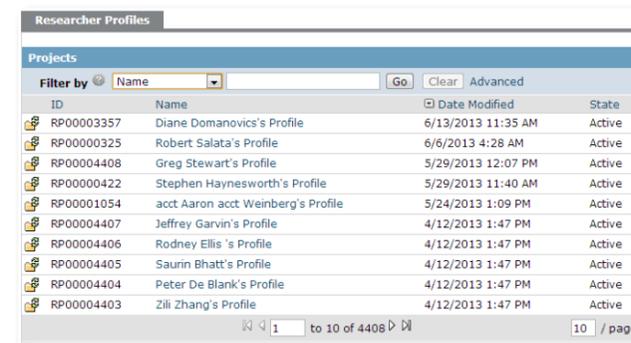
SPARTA PROFILE

FIND YOUR PROFILE

- Find the tab labeled **SPARTA Profiles** in the navigation ribbon. Click here.



- Locate the drop-down menu labeled **Filter by**. Click the upside down triangle and select **Name** from the list.
- Type your first and last names in the text box next to **Name**. Click **Go**.
- Find your name in the resulting list. Click to select your profile.



VERIFY PROFILE DETAILS

Determine that your SPARTA Profile is both active and correct.

- Locate the Current State label in the upper left of the screen. If the word **Active** appears in the yellow rectangle proceed to review and edit your profile.
- If the words **Expired** or **Pending Review** appear contact the Office of Research Administration for assistance.

EDIT PROFILE DETAILS

- Click the task labeled **Edit Researcher Profile**.
- Verify and update Contact Details (name, address, phone, fax and email).
- Add comments in text box 20, if needed.
- Click **Continue**.
- Verify eRACommons User ID, listed degree(s), position(s) and primary department.
- Add additional or update existing eRACommons User ID, degree(s), position(s) and department as necessary.
- Click **Continue**.

FUNDING PROPOSALS

STARTING A NEW FUNDING PROPOSAL

The Funding Proposal replaces the eURF. Information entered in the Funding Proposal is leveraged by SPARTA to help streamline compliance reviews, gather the proper application forms, and generate dynamic high-level project summaries for department and division chairs.

CREATE AND NAME

- Click the Grants tab in the horizontal navigation bar near the top of the page.



- Click the task labeled **New Funding Submission**.



- Assign the new proposal both a short and long title.
- Choose at least one keyword for your project. As you type, SPARTA will provide a list of possible matches. Or, click **Add** to choose keywords from the master list. Click **OK** to add.
- Continue completing the form. Click **Continue** to Save and go to the next page.

EDITING A FUNDING PROPOSAL

To open the Funding Proposal Workspace, click the name of an existing funding proposal in **My Home**.

- To continue a Funding Proposal, Click the **Edit Funding Proposal** button on the left.
- Continue the Funding Proposal.

BUDGET WORKSPACE

STARTING A BUDGET

SPARTA provides tools to simplify budgeting for proposals and follow-on submissions. In this section, we will discuss in detail the process for creating a new proposal budget, step-by-step.

VERIFY PROPOSAL STATUS AND BUDGET DATES

- Verify that the Current State of the funding proposal is **Draft**.
- Click **Grid: Edit Budget Periods/Dates**.
- Verify that the budget dates and periods are accurate.
- Update number of periods, start date and durations as needed and click **Apply**.
- Click **Ok** and return to the Funding Proposal workspace.

OPEN THE BUDGET WORKSPACE AND ACCESS BUDGET GRIDS

- Click the **Budgets** tab.
- Click the name of the budget you would like to edit to open the workspace.

Proposed Budgets	
ID	Name
BU00121775	NIH- PROPOSAL ONLY
BU00121777-CS	Cost Sharing for NIH- PROPOSAL ONLY

- Confirm that the **Current State** of the budget is **Draft**.
- Click **Edit Budget**.

