



OneAegis

User Guide for Principal Investigators and Project Directors

The College of New Jersey
Office of Grants and Sponsored Research
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1.0 OneAegis

1.1 What is OneAegis?

OneAegis is an electronic system for Grant tracking and IRB management (see the [OneAegis IRB User Guide](#)). OneAegis allows TCNJ to track all grant activity in one comprehensive environment, and to keep grant records current throughout the life of the proposal-to-award cycle.

Benefits of the electronic application include:



- Conditioned questions that display or disappear based on the responses in the progression of the application.
- All submitted documents contained within the application allowing easy access to the most current document versions.
- The ability to track changes such as no-cost extensions, funding increases, and PI transfers so that the grant record is always up-to-date.
- Easy, customizable reports to increase efficiencies and allow for targeted snapshots of grant activity.

This system is fully web-based and allows remote users access through all logical networks (LAN, WAN, VPN, internet, etc).

2.0 OneAegis Login

2.1 Logging in for the first time

Log in to OneAegis at <https://tcnj.oneaegis.com>. Select the “click here” link to login using your TCNJ credentials. As a new user to OneAegis, you may want to take a moment to update your profile (optional). This only needs to be done once.

1. In the upper right corner, select the person icon  to get to your profile.
2. Update your profile as desired (optional):
 - Change my Profile – to update prefixes (Mr., Ms., Dr., etc.), suffixes (Jr. III, etc.), and specialties and degree information.
 - My Phone Number(s) – phone contact information
 - My Addresses – home and business addresses
3. Click the switchboard icon  to go back to your dashboard and choose the Grants tile.

2.2 Logging in with an existing account

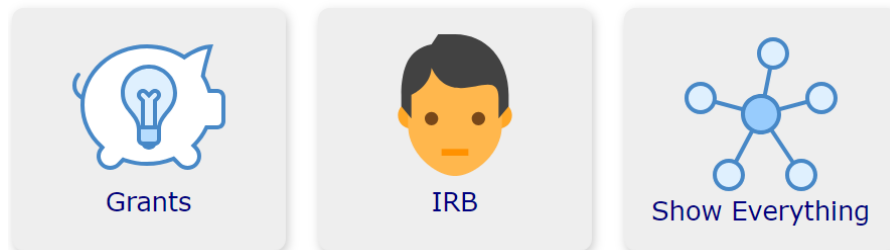
You can login to OneAegis at <https://tcnj.oneaegis.com>. Select the “click here” link to login using your TCNJ credentials.



To login using your organizational login [click here](#)

Once logged in, you'll land on your dashboard. From here you can select the Grants tile to move forward with grant activity.

What do you want to focus on?



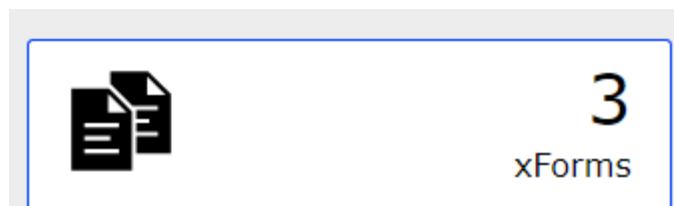
3.0 Intent to Submit (ITS) Form

3.1 What is an Intent to Submit form?


The Intent to Submit form is your alert to the Office of Grants and Sponsored Research (OGSR) that you'd like to submit a proposal for external funding. Completing an Intent to Submit form initiates the grant process to ensure that all TCNJ procedures are followed so that we will be prepared to accept your award upon funding.

3.2 How do I complete an Intent to Submit form?

1. To alert the Office of Grants and Sponsored Research that you'd like to submit a proposal for external funding, go to the xForms tab within the Grants tile.



[Start a New Grants Intent to Submit xForm](#)

2. Click Start a New Grants Intent to Submit xForm.
This form replaces what we formerly referred to as an “Early Notification”.
3. Follow the instructions within the form to complete each field.
 - a. If you’d like to add a collaborator to your form, choose the Collaborators link at the top of the screen:  [Collaborators](#)
 - i. Here you can select someone within TCNJ and set their rights to (1) View, (2) Edit, (3) Edit and manage, or (4) Edit, manage, and submit.
 - ii. Note: if the person you’d like to select does not show up as an option, ask them to log into OneAegis using their TCNJ credentials. Once they’ve logged in they should be available to collaborate within the platform.
 - b. Answer the PI questions on the form, and click Next.
 - c. Continue the form, completing each question.
 - i. Responses can be edited later, so don’t worry if you don’t have final answers at this time.
 - ii. If Co-PIs and/or Senior Personnel will be involved in the project, answer Yes to the question “Would you like to add any other personnel to this project?” in the Project Personnel section. **IMPORTANT:** for each additional personnel added, **remember to click save** in the upper right corner of the personnel tile.
4. Once the ITS form is completed, click Next at the bottom of the screen, and then click Submit.

3.3 What happens after you Submit your ITS form?

1. Once you submit your Intent to Submit form, you and any co-PIs listed on the ITS will receive a blank Financial Conflict Of Interest (FCOI) form via email. Ensure that you complete the form, obtain a signature from your dean or senior approver, and return it to OGSR at grants@tcnj.edu.
 - a. If a collaborator or OGSR has entered the Intent to Submit form on your behalf, you will receive an email asking you to approve the form. Use the link embedded within the email to access the form directly, review, and submit your approval.
2. OGSR will review your form and either:
 - a. Approve it and move it to the routing stage; or
 - b. Send it back to you or your submitter for clarification. If this happens, you will receive an email with a link to the form. You can make the requested changes or updates and submit the form again.
3. If OGSR needs more information or clarification from you, you will receive an email similar to the below. You will be able to get to your ITS form directly by clicking the included link:

Project #: G24.100
Title: Project title
PI: Heather Mayen

OGSR has requested the following revisions/information on your Intent to Submit form:

[Text will be added here to specify the clarifications or information requested.]

To open the form and complete your revisions, click here: [Grants Intent to Submit Form](#)

4. If OGSR approved your Intent to Submit form, you will receive the following email. You will be able to get to your ITS form directly by clicking the included link.

Project #: G24.100
Title: Project title
PI: Heather Mayen

OGSR has reviewed your Intent to Submit form. When you are ready to route your draft proposal documents for internal approvals, please click the link below to attach your budget and abstract to the form and to initiate the routing process.

[Grants Intent to Submit Form](#)

4.0 Routing for Internal Approvals

4.1 How do I get approval to submit my proposal to the funder?

Once your Intent to Submit (ITS) form has been approved by OGSR, you may route for approvals at any time, and should do so **at least 5 business days prior to the proposal deadline.** .

To route for approvals:

1. When OGSR approved your Intent to Submit form, you received the referenced email in section 4. above. Click the link to your ITS form in the email to bring up your routing form.
2. Complete the form, including an upload of your final (or almost-final) budget and a final (or almost-final) abstract or narrative for your proposal.
3. Click Next, and submit.

4.2 What happens after you submit your Routing form?

1. Once you submit your Routing Form, OGSR will again review for completeness. If corrections are needed, you will receive an email similar to the below. You will be able to get to your ITS form directly by clicking the included link:

Project #: G24.100
Title: Project title
PI: Heather Mayen

OGSR has requested the following revisions/information on your Intent to Submit form:

[Text will be added here to specify the clarifications or information requested.]

To open the form and complete your revisions, click here: [Grants Intent to Submit Form](#)

2. If OGSR approved your Intent to Submit form, your chair and dean (or other assigned approvers) will receive emails with instructions to review and approve your form and attachments.
3. When all approvers have signed off on the process, you will receive an email similar to the below, indicating that you are ready to prepare for submission to the funder.

Grant Project Number: G24.100
Title: Project title
PI: Heather Mayen

Your Intent to Submit form has been approved. Please work with OGSR to submit your proposal. A submission meeting should be set up at least 2 days in advance of the funder's due date. Please contact grants@tcnj.edu with any questions.

4. At this point you should work with the Office of Grants and Sponsored Research (OGSR) to finalize and submit your proposal to the funder. Submissions should be planned for 2 days or more prior to the deadline. *OGSR does not submit proposals on the deadline date.*

5.0 When a Funding Decision is Made

Once you are made aware of the funder's decision, please alert OGSR and forward any decision documentation to grants@tcnj.edu. The staff in OGSR will keep your OneAegis record updated to reflect the status of your proposal.

6.0 When You are Funded

Once your award has been funded, your OneAegis record will be updated by OGSR. If/when changes are needed on your award, such as a no-cost extension, a budget re-allocation, etc., please be sure to keep

in communication with OGSR. OGSR staff will assist with funder requests as well as keep your grant records updated with each change.

7.0 Tips for Using OneAegis

- ❖ *Pay attention to instructions as you complete the forms. Many of the questions have help text directly underneath the question text. For assistance, reach out to OGSR at grants@tcnj.edu.*
- ❖ *When you notice a Dark Blue Question Mark on xForms, hover over it to view the relevant help text.*
- ❖ *Enlarge font on your display screen by using the zoom feature in your browser.*