

# Business Intelligence & Analytics Center

## **Business Automation Platform (BAP) Science and Technology Award Application (STAA) User Guide**

**Version 1.2**

U.S. Environmental Protection Agency  
Office of Digital Services and Technical Architecture  
Digital Services Division  
Business Intelligence & Analytics Center

## Table of Contents

About the Scientific and Technological Achievement Award (STAA) .....	3
EPA’s Business Automation Platform.....	3
Requesting Access to the BAP.....	3
Logging in to the BAP .....	4
First-Time Login.....	4
After First-Time Login.....	4
EPA login screen.....	5
Login with Username and Password .....	5
Salesforce Home Page.....	7
Current Application.....	7
Global Search .....	7
Tabs .....	8
App Launcher (Waffle) .....	9
Items to Approve .....	9
Recent Records .....	9
Introduction to the STAA Application .....	10
Cover Forms .....	11
Creating a New Award Application .....	11
Approving Forms.....	21

## About the Scientific and Technological Achievement Award (STAA)

The EPA's Science and Technological Achievement Awards (STAA) program promotes and recognizes scientific and technological achievement by EPA employees. STAA is among the most prestigious of EPA's scientific awards programs.

The STAA program is an agency-wide competition sponsored by the Office of Research and Development (ORD) that recognizes outstanding scientific and technological papers published by EPA employees. Each year since 1980, EPA scientists and engineers have submitted their publications to be evaluated by a panel convened by EPA's Science Advisory Board (SAB). The SAB convenes an experienced group of scientists and engineers who review and evaluate the nominations. The SAB review panel then produces a set of recommendations used to select the actual awards.

The STAA application on the Agency's Business Automation Platform (BAP) is designed to create and track nominations for publications.

## EPA's Business Automation Platform

In 2017 the Office of Environmental Information (OEI) established the Agency's BAP based on the [Force.com](#) platform from Salesforce, an industry-leading application Platform as a Service (aPaaS) provider. The BAP supports all EPA Offices and Regions by supporting development and hosting of applications for business processes, data collection, reporting, and workflow automation.

The BAP allows development and deployment of forms, workflow automation, and reports in a declarative environment, i.e., without writing programming code. This saves the Agency time and money. It also lets application owners and developers avoid getting bogged down in infrastructure provision and management, as Salesforce handles that for them. The BAP helps you build your application with modern frameworks that handle security, user access, user interface, reporting, etc. All you have to do is concentrate on your business logic.

For more information, visit the [BAP Community SharePoint](#). If you have any specific questions, email [bap-request@epa.gov](mailto:bap-request@epa.gov).

## Requesting Access to the BAP

To use STAA, you will need a BAP account. If you already have a BAP account, you may skip this section and proceed to the **Logging in to the BAP** section.

If you do not have a BAP account, you will need to fill out a **BAP User Provisioning Form**. Instructions for filling out this form can be found in the *BAP User Provisioning Guide* at this URL:

[https://usepa.sharepoint.com/sites/oei\\_Community/BAP/Shared%20Documents/BAP-User-Provisioning-Guide.pdf](https://usepa.sharepoint.com/sites/oei_Community/BAP/Shared%20Documents/BAP-User-Provisioning-Guide.pdf)

On this form:

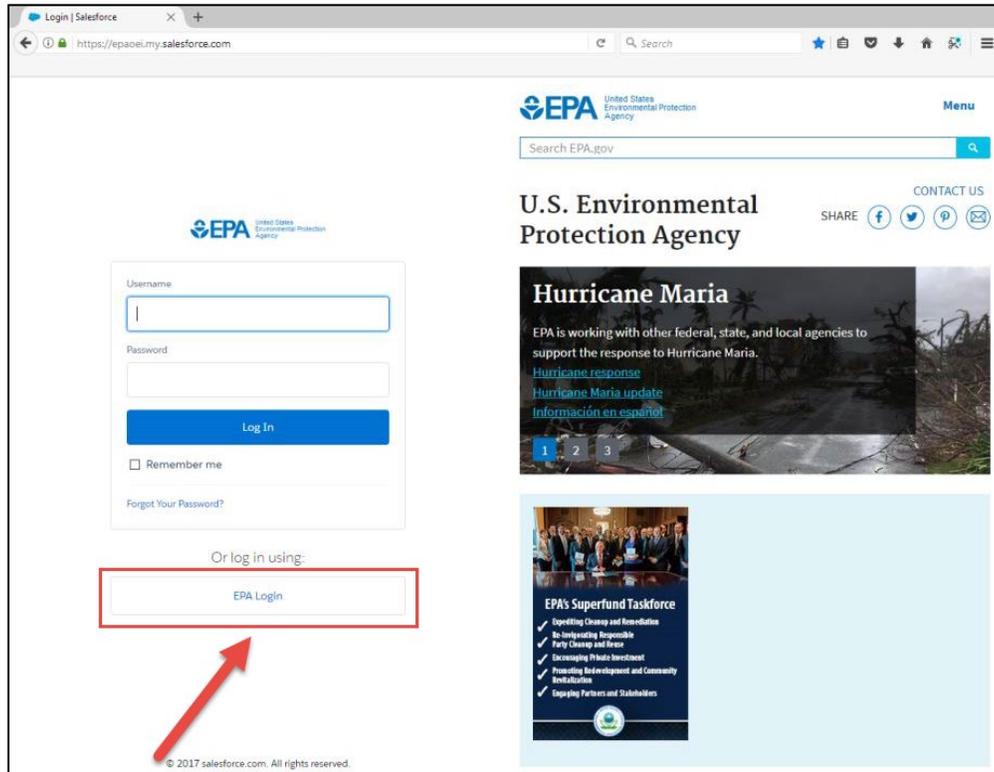
1. Select "Permission Set" in the **Form Type** field.
2. Select "Application" in the **Role** field.
3. Type "STAA" in the **Related Application Name** field.
4. Select "STAA Application Access" in the **Permission Set Name** field.

## Logging in to the BAP

Please follow the steps below for accessing the system (<https://epaoei.my.salesforce.com>).

### First-Time Login

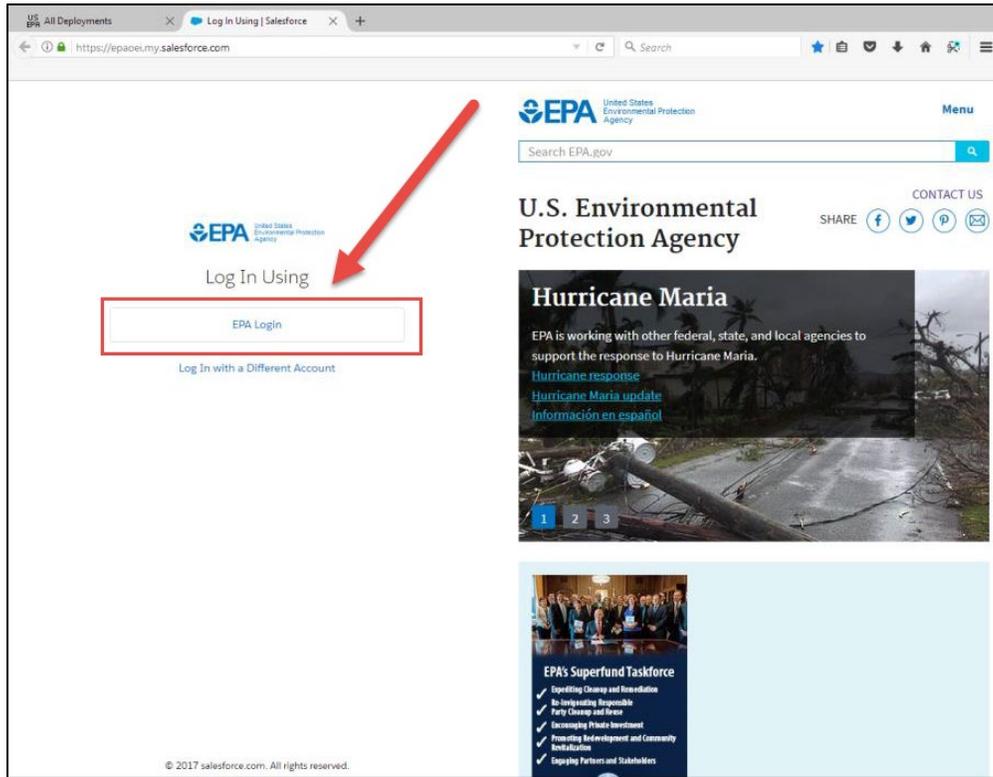
The First time you log in, you will see the following screen. Do not enter your Username and Password in the fields provided, you will receive an error. Instead, click the EPA Login button at the bottom. This allows you to utilize your EPA LAN credentials, rather than maintaining a separate set of credentials for the applications on the Salesforce platform.



**Note:** The Salesforce credentials may be used by some contractors who do not have EPA LAN credentials. If any users are non-EPA employees, make your Salesforce team aware.

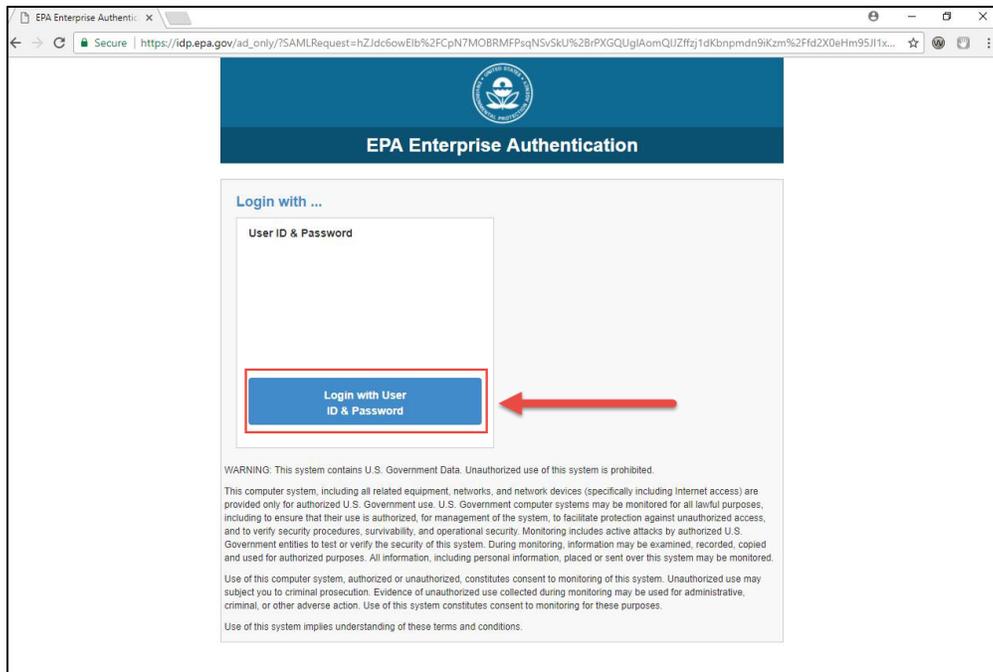
### After First-Time Login

On subsequent uses, the EPA Login button is prominent, and the unused Username/Password option is hidden for you.



## EPA login screen

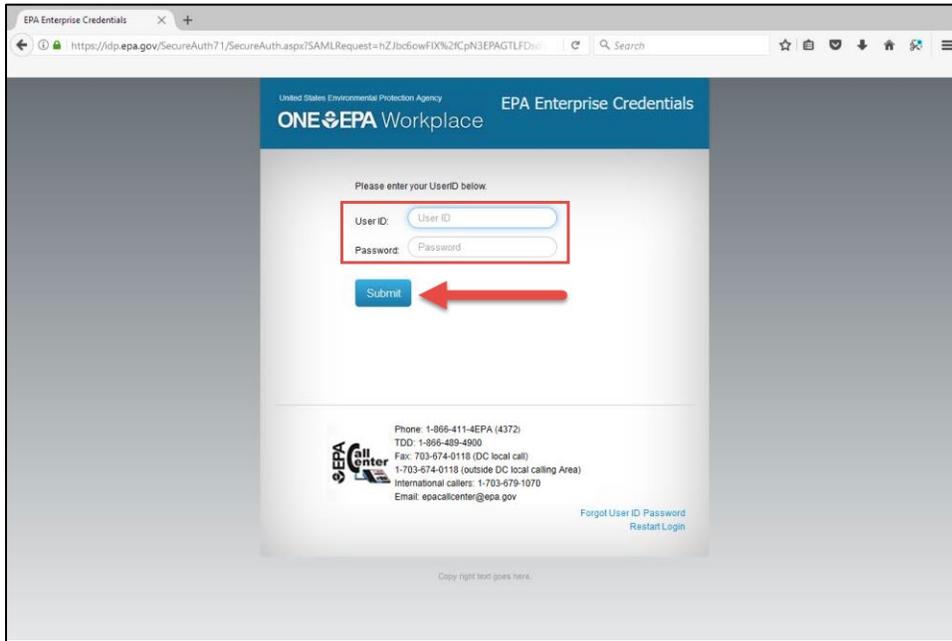
After selecting EPA Login, you will be presented with the following screen. You will login using your EPA User ID and Password.



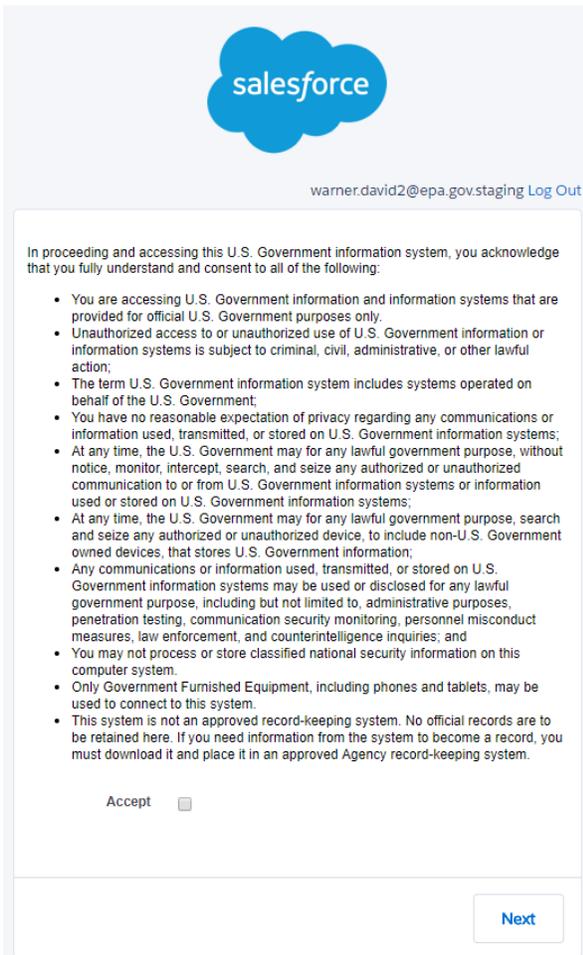
## Login with Username and Password

1. Select "Login with User ID & Password."
2. Enter your EPA LAN User ID and Password.

3. Click 'Submit.'

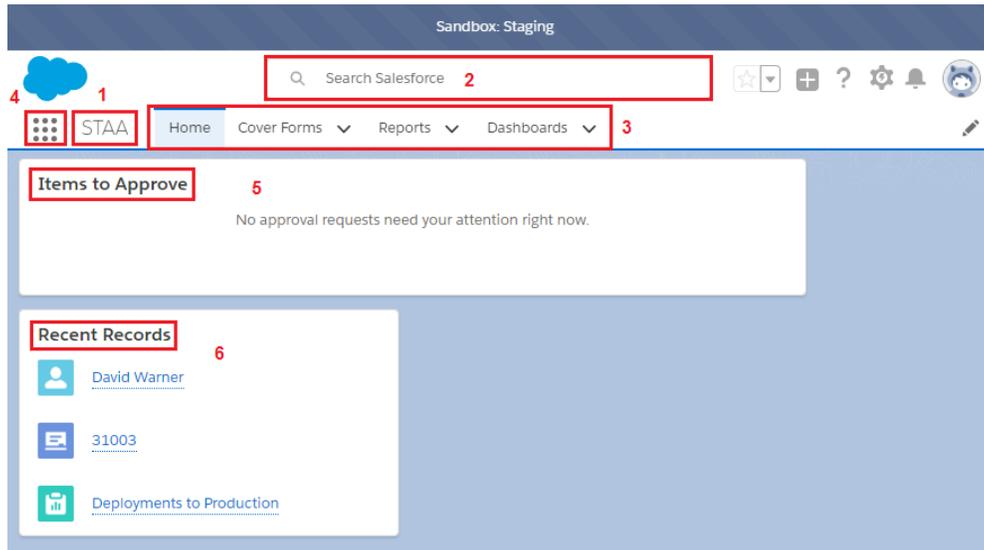


4. On the government system acknowledgement screen that follows, click on the 'Accept' check box and click 'Next'.



## Salesforce Home Page

After logging in, you will be taken to your default application's home screen. **The home screen defaults to the BAP Agency Forms Home screen for all users because this is the new Forms application.**



1. **Current Application** – Your current application
2. **Global Search** – Search for records and items within the system
3. **Tabs** – These allow you to switch between the different components of your current application
4. **Application Switcher (Waffle)** – If you have access to multiple Salesforce applications or objects, this allows you to switch between them
5. **Items to Approve** – Records pending your approval
6. **Recent Records** – Records you have recently opened (Note: these are not application specific if you have access to more than one application)

### Current Application

This displays the name of the current application selected, as a reminder to you. As you switch between applications, if you have access to more than one, this will display the current application name.

### Global Search

**Global Search** is available on every page in Salesforce and allows you to find records you have access to in the system. **Global Search** produces results for record types (including accounts, opportunities, documents, offerings, artifacts), Chatter feeds, files, groups, topics, and people as well as field types (including custom fields and long text fields such as descriptions, notes, and task and event comments). **Global Search** keeps track of which objects you use and how often you use them. Search results for the objects you use most frequently appear by default.

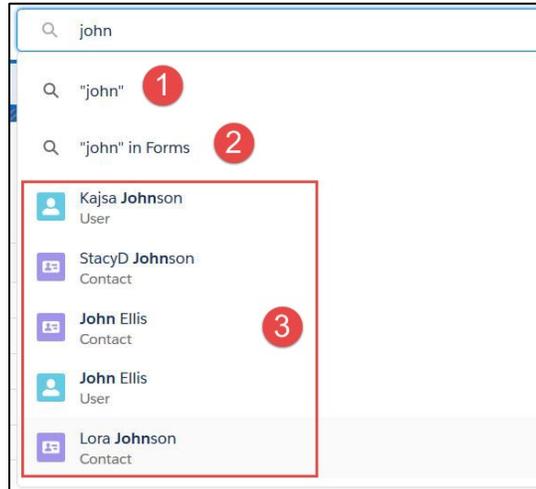
Search terms are treated as separate words and may be found in different searchable fields within a record. Below is an example of the **Global Search** results when searching for the name "John". You will see that you see results for Forms, Accounts and Contacts that are associated with a person named John. Global Search is very helpful especially when you do not know the exact or full name of a person, what Contacts are affiliated with an Account and you need to find the information quickly. You can also search by other fields on the object, such as the Phone Number on a Contact, not just the Name.



**Note:** If you'd like to conduct a phrase search to match multiple terms in the exact sequence that they appear, select **Exact Phrase** in the Options or use quotations marks around your search terms.

You can use the \* (asterisk) and ? (question mark) wildcards to refine results. Use \* to match one or more characters, or use ? to match a single character. For example, searching for **bob jo\*** finds items with Bob Jones and Bob Johnson, and searching for **jo?n** finds items with john and joan. You can also use the **AND, OR, AND NOT, ( )** (parentheses), and " " (quotation marks) operators to refine results.

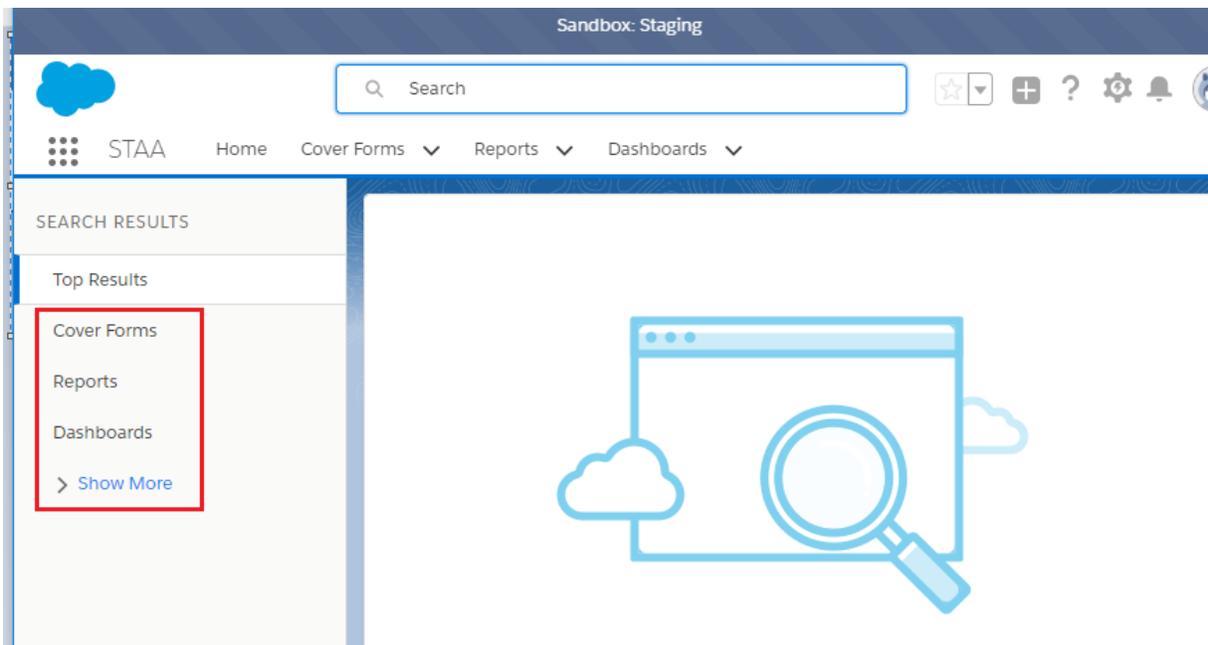
The **Global Search** bar also provides instant results as you type, allowing you to locate items quickly.



1. Clicking on the search term (or pressing 'Enter') will take you to the complete results.
2. Clicking on the search term 'in [Object]' option will locate results only in the current object instead of across the system.
3. Clicking on any of the instant results will take you directly to that record.

The complete results will be organized automatically by Object (which are components of an Application, and are represented by the Tabs), therefore, you will see all the results that match your search grouped by their object.

In the example above, we're searching for the term "John". Search results are separated into the Cover Forms Object, the Reports Object, and the Dashboards Object, with the option to "Show More" objects.

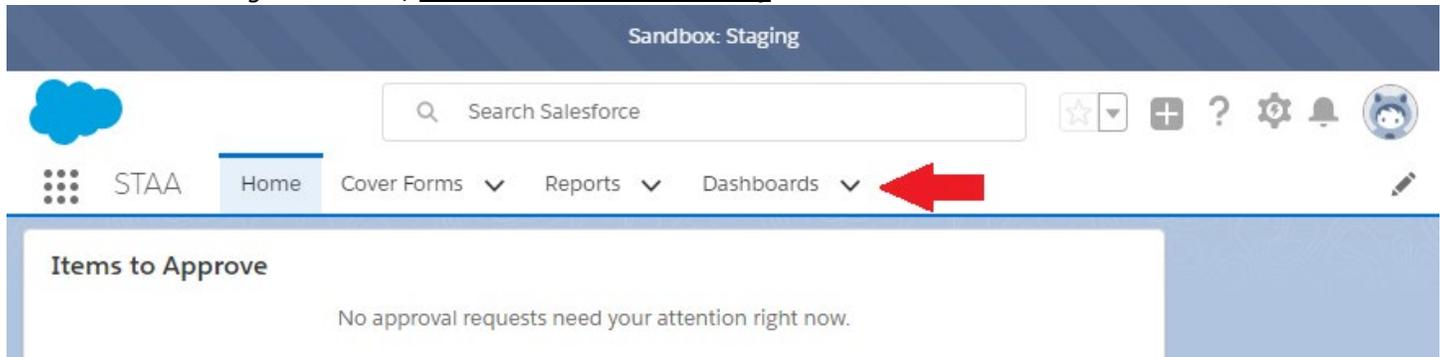


## Tabs

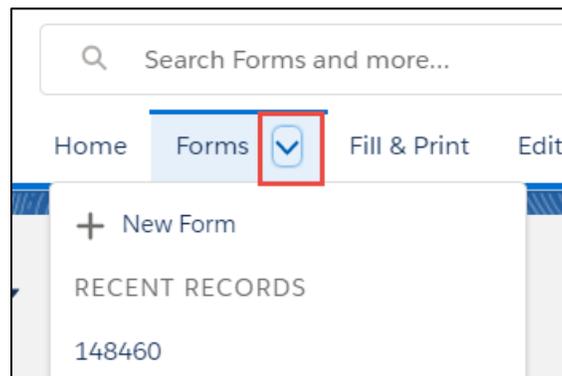
Across the top of the page you will see all the **Tabs** available within the current application and will help you access the different functions/processes. They will change depending on the application. These Tabs are based on the permissions that the Administrator set for you. Different users will potentially see different Tabs based on their roles. These Tabs will help you access the different functions available to you within the current application.



**Note:** To navigate to a Tab, click on the Tab (Name) itself.



Clicking on the arrow (the “V” button) will open a dropdown menu instead of taking you to the Tab Page.



## App Launcher (Waffle)

If you have access to more than one application, clicking on this will allow you to switch between them. It will also display the individual Objects, such as Forms or Contacts, Agreements, Projects, Cost-Share Contributions and Cost-Share Reviews, to which you have been granted access – these are not specific to your current application, but are all those to which you have access.

## Items to Approve

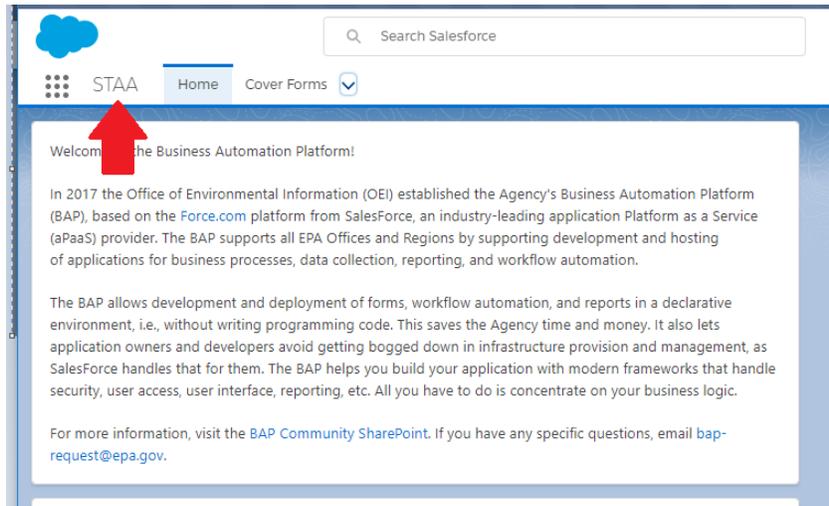
This section will contain a list of all records currently pending your approval. If you have been chosen to approve a particular record, typically by another user or system process, they will be added to this list. Additionally, as you approve or reject those items, they will be automatically removed from this section so that only pending items are displayed. Click the “View All” link at the bottom of the section to view additional items to approve.

## Recent Records

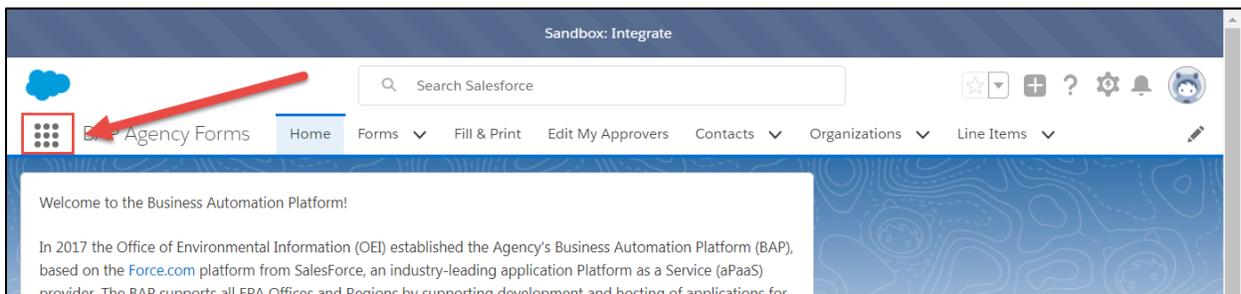
This list contains the more recent records you have opened. These are typically listed in chronological order by which was opened most recently. Note that these are not specific to your currently selected application, and therefore are across all the different types of records you have access to within the system. Click the “View All” link located at the bottom of the section to view additional recent records.

# Introduction to the STAA Application

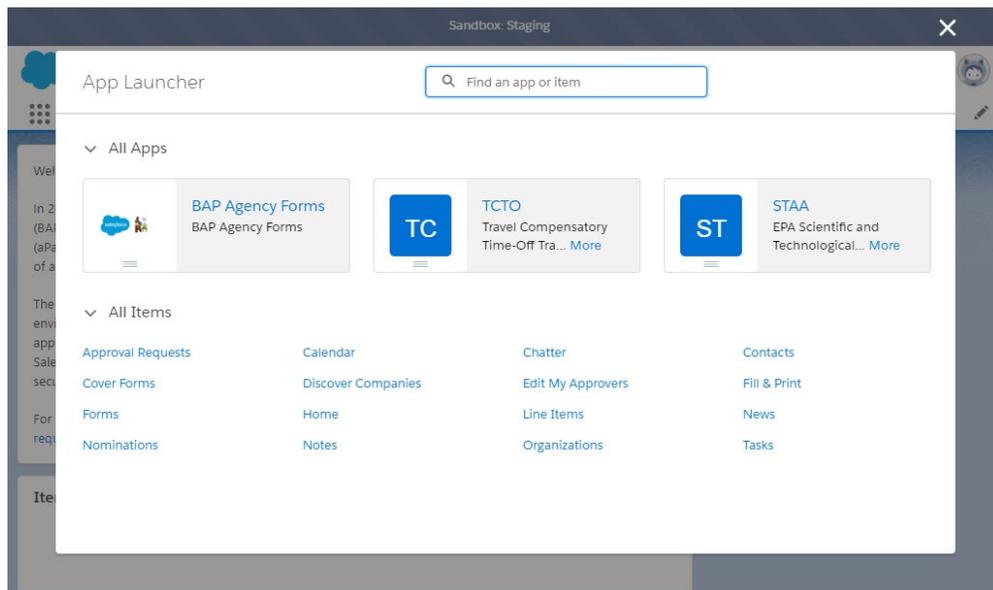
To access STAA forms, first make sure you are in the STAA Application.



If the STAA Application is the only Salesforce application to which you have access, your screen will default to this page. Otherwise, to get to the STAA Application (or to switch to other applications you may have access to), click on the App Launcher (Waffle), located all the way to the left of the Tab row.



Select "STAA" from the list of applications.



The Current Application and Tabs (Objects) will show you that you are in the STAA Application.



4. Once the New Cover Form section is completed, STAA creates a record of the form and takes you to that form's page.

Cover Form  
EPA-CF-0000000011

DETAILS	JUSTIFICATION 1	JUSTIFICATION 2	MORE
Nomination ID 18-012		Owner David Warner	
Primary Research Category Energy and the Environment (EE)		Laboratory/Office Name OEI	
Secondary Research Category Control Systems and Technology (CS)		Nominating Author David Warner	
Nominating Official David Warner		EPA Employee ID 99993555	
STAA Coordinator David Warner		Organization OEI-OITO-EHD	
Status DRAFT			

If at any time you need to return to your form's page, click on the drop-down arrow on the Cover Forms tab and select your form from the menu.

5. Inside this form, the left-hand information window contains five tabs:
  - a. **Details:** Contains the information you entered on the New Cover Form page.
  - b. **Justification 1**
  - c. **Justification 2**
  - d. **Justification 3**
  - e. **Comments**

Cover Form  
EPA-CF-0000000011

DETAILS	JUSTIFICATION 1	JUSTIFICATION 2	JUSTIFICATION 3	COMMENTS
Nomination ID 18-012		Owner David Warner		
Primary Research Category Energy and the Environment (EE)		Laboratory/Office Name OEI		
Secondary Research Category Control Systems and Technology (CS)		Nominating Author David Warner		
Nominating Official David Warner		EPA Employee ID 99993555		
STAA Coordinator David Warner		Organization OEI-OITO-EHD		
Status DRAFT				
Info Citation Enter Citation Here.				
Created By David Warner, 5/25/2018 3:02 PM		Last Modified By David Warner, 5/25/2018 3:02 PM		

If your browser window is narrow, you will see a tab called **More**. Click on this tab to see all the remaining tabs in the menu.

The screenshot shows a navigation menu with three tabs: 'DETAILS', 'JUSTIFICATION 1', and 'MORE'. The 'MORE' tab is selected and highlighted in blue. A dropdown menu is open from the 'MORE' tab, containing three items: 'JUSTIFICATION 2', 'JUSTIFICATION 3', and 'COMMENTS'. To the right of the dropdown, parts of other menu items are visible: 'War...', 'Office', 'Auth', and 'ner'.

Below this section is an **Authors** section for editing author information and a **Publications** section for attaching supporting documents for your STAA nomination. These sections will be covered later in this document.

The screenshot displays two sections in a web interface. The top section is titled 'Authors (1)' and includes a 'New' button. Below the title is a table with the following data:

NAME	TITLE	PRINCIPAL AUTHOR?	% OF TOTAL EFFORT
<a href="#">David J Warner</a>		<input checked="" type="checkbox"/>	<input type="text"/>

Below the table is a 'View All' link. The bottom section is titled 'Publications (0)' and includes a 'New' button. A message above this section reads: 'Please attach supporting document files to your 'Publications' by clicking on the 'Line Item Name' and navigating to the 'Files' section'.

In the bottom right-hand corner of the page is the Eligibility Checklist, which contains descriptions of all four STAA eligibility criteria and a form which must be filled out before the STAA Application can be submitted.

The screenshot shows a form titled "Eligibility Checklist" with a list of four criteria and a "Required" section with checkboxes and pencil icons.

**Eligibility Checklist**

- **Eligibility Criteria 1:** The nominated publication(s) has not been submitted to a previous STAA competition.
- **Eligibility Criteria 2:** The nominated publication(s) was published on or before January 1, 2018, and on or after January 1, 2013.
- **Eligibility Criteria 3:** The principal author was an EPA employee or a PHS employee assigned to EPA when the research was performed.
- **Eligibility Criteria 4:** The EPA author has submitted a "Record of Agreement" to attest that credit has been correctly assigned.

**Required**

Eligibility Criteria 1

Eligibility Criteria 2

Eligibility Criteria 3

Eligibility Criteria 4

6. Click on the Justification 1 item in the top menu to open this section.

*Explain how the nominated papers represent research that is innovative and important in advancing the scientific knowledge or technology relevant to EPA's mission. It is important to provide a clear and compelling explanation of the relevance, and impact of the research to EPA's mission (For example, the relevance of the research to one of EPA's strategic goals may be described) (Limit to 16,000 characters including spaces.)*

Click on the pencil icon in this form to fill out Justification 1.

The screenshot shows a form with a top menu containing "DETAILS", "JUSTIFICATION 1", "JUSTIFICATION 2", and "MORE". The "JUSTIFICATION 1" tab is selected. Below the menu is a text area with instructions and a "Complete Justification 1" section with a pencil icon and a red arrow pointing to it.

DETAILS    **JUSTIFICATION 1**    JUSTIFICATION 2    MORE

Explain how the nominated paper's represent research that is innovative and important in advancing the scientific knowledge or technology relevant to EPA's mission. It is, important to provide a clear and compelling explanation of the relevance, and impact of the research to EPA's mission (For example, the relevance of the research to one of EPA's strategic goals may be described) (Limit to 16,000 characters including spaces.)

**Complete Justification 1**

Justification 1 ⓘ  
Full explanation goes here.

7. Click on the Justification 2 item in the top menu to open this section, which specifies the following:

*The EPA Guidelines prohibit resubmission of publications nominated for STAA Awards in previous years.*

Click on the pencil icons for each justification form to fill it out.

- a. **Justification 2A:** If multiple publications are submitted, provide a comprehensive explanation of the relationship and lengths between subject matter among the different nominated publications. For example, the discussion could describe how one publication builds on the results of a second publication. (Limit to 16,000 characters including spaces.) Enter n/a if blank.

If multiple publications are submitted, provide a comprehensive explanation of the relationship and lengths between subject matter among the different nominated publications. For example, the discussion could describe how one publication builds on the results of a second publication. (Limit to 16,000 characters including spaces.) Enter n/a if blank.

 **Complete Justifications 2A** 

Justification 2A 

---



- b. **Justification 2B:** List the previous 5 years of STAA nominations and associated publications for each EPA author. Categorize the list by author and include publication title, year, and award. (For example, John Smith, publication title(s), year(s), award(s).) (Limit to 16,000 characters including spaces.) Enter n/a if blank.

List the previous 5 year's of STAA nominations and associated publications for each EPA author. Categorize the list by author and include publication title, year, and award. (For example, John Smith, publication title(s), year(s), award(s).) (Limit to 16,000 characters including spaces.) Enter n/a if blank.

 **Complete Justification 2B** 

Justification 2B 

---



- c. **Justification 2C:** Provide a description of how this nomination's publication(s) differ from previous (last 5 years) and current nominations by the author(s). (Limit to 16,000 characters including spaces.) Enter n/a if blank.

Provide a description of how this nomination's publication(s) differ from previous (last 5 years) and current nominations by the author(s). (Limit to 16,000 characters including spaces.) Enter n/a if blank.

 **Complete Justification 2C** 

Justification 2C 

---



- d. **Justification 2D:** Indicate whether previously submitted supplemental information is listed as supplemental information for the current nomination. (Limit to 16,000 characters including spaces.) Enter n/a if blank.

Indicate whether previously submitted supplemental information is listed as supplemental information for the current nomination. (Limit to 16,000 characters including spaces.) Enter n/a if blank.

 **Complete Justification 2D** 

Justification 2D 

---

- e. **Justification 2E:** If any of the authors have submitted a concurrent nomination to another research category, provide sufficient justification to distinguish the difference between nominations. (Limit to 16,000 characters including spaces.) Enter n/a if blank.

If any of the authors have submitted a concurrent nomination to another research category, provide sufficient justification to distinguish the difference between nominations. (Limit to 16,000 characters including spaces.) Enter n/a if blank.

 **Complete Justification 2E** 

Justification 2E 

---

8. Click on the Justification 3 item in the top menu to open this section. Fill out the forms in this section as directed.

- a. **Justification 3A:** Provide evidence of recognition of the contribution from outside. (Limit to 16,000 characters including spaces.)

Provide evidence of recognition of the contribution from outside. (Limit to 16,000 characters including spaces.)

 **Complete Justifications 3A** 

Justification 3A 

---

- b. **Justification 3B:** Provide an explanation of the external peer review process used to evaluate the scientific merit of the nominated publication(s). (Limit to 16,000 characters including spaces.)

Provide an explanation of the external peer review process used to evaluate the scientific merit of the nominated publication(s). (Limit to 16,000 characters including spaces.)

 **Complete Justifications 3B** 

Justification 3B 

---

9. The Comments tab contains directions regarding the submission of the application and its approval history. Nothing needs to be filled in here.

'Submit Application' saves the nomination and forwards it to the Nominating Official.

Applicants cannot make any changes after submission, since the nomination is now under control of the Nominator.



Approval History (0)

10. Scroll down to the **Author** section to add information about all authors involved in the publication.

Click on 'Name' below to edit 'Author' information

Authors (1) <span style="float: right;">New</span>			
NAME	TITLE	PRINCIPAL AUTHOR?	% OF TOTAL EFFORT
<a href="#">David J Warner</a>		<input checked="" type="checkbox"/>	<input type="text"/>

[View All](#)

To add a new author, click on the New button in the top right-hand corner. To edit an existing author, click on the name of each author to go to that author's detailed page, then click on Edit in the top right-hand corner to open the editor. Inside the editor, make sure the following information is included:

- Author's **Email**
- Author's **Phone Number**
- % of Total Effort** author put into publication
- Whether the Author has a **Record of Agreement**
- If the Author is an EPA employee or not under **At Time Research Was**

When finished entering author information, click **Save**.

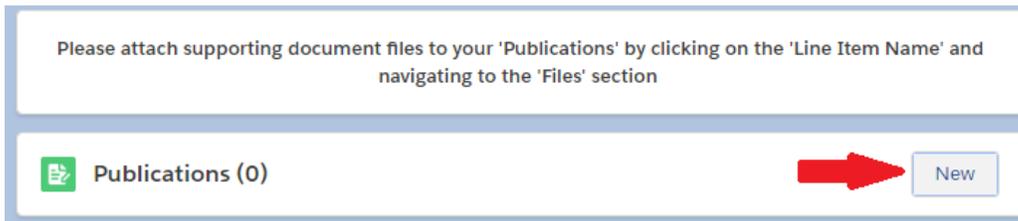
DETAILS RELATED

<p>* Name</p> <p>Salutation --None--</p> <p>First Name David</p> <p>Middle Name J</p> <p>* Last Name Warner</p> <p>Suffix</p> <p>Preferred Name</p> <p>* Email</p> <p>* Phone</p> <p>Mobile</p> <p>Title</p> <p>Laboratory/Office Name OEI</p>	<p>Mailing Address</p> <p><input type="text" value="Q Search Address"/></p> <p>Mailing Street</p> <p>Mailing City</p> <p>Mailing State/Province</p> <p>Mailing Zip/Postal Code</p> <p>Mailing Country</p> <p>Organization Name <input type="text" value="Search Organizations..."/></p> <p>% of Total Effort 100</p> <p>Record of Agreement? <input checked="" type="checkbox"/></p> <p>non-EPA Personnel <input type="checkbox"/></p> <p>At Time Research Was Non EPA Author</p> <p>Retirement or Separation Date from EPA</p>
--	---

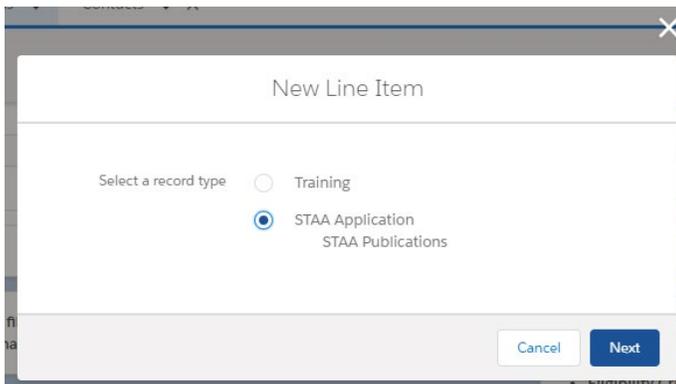
Cancel Save

11. Once you have completed filling in all Justification forms and Author information, you will need to attach supporting document files to the **Publications** section at the bottom of the page.

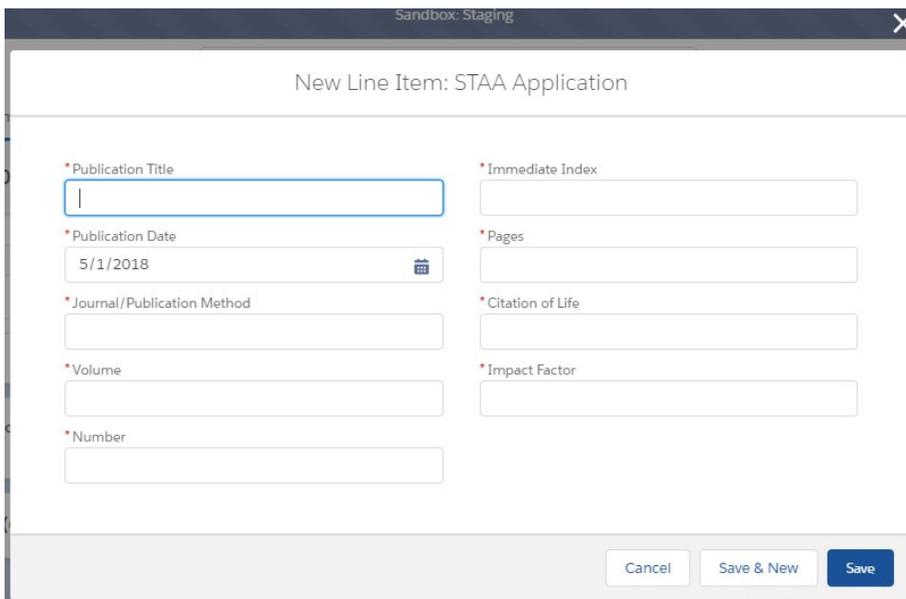
- a. Click on the **New** button on the right-hand side to start.



- b. A pop-up window will appear. In this window, select **STAA Application** and click **Next**.



- c. Fill out the publication information in the next pop-up window and click **Save**. All fields marked with an asterisk are required fields.



- d. When completed, the publication info will appear at the bottom of the page.

ITEM ID	PUBLICATION TITLE	PUBLICATION DATE	JOURNAL/PUBLICATI...
<a href="#">14098</a>	Title	5/1/2018	Journal

[View All](#)

- e. Click on the **Item ID** number to go to the publication page.

Line Item **14098** Edit Delete

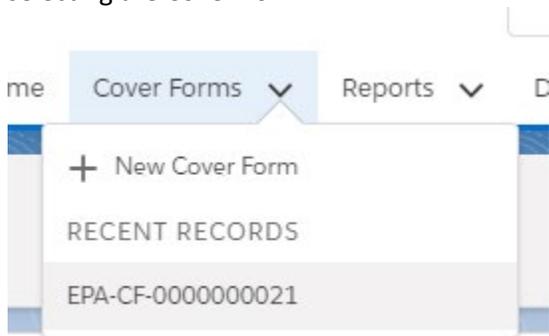
Publication Title Title	Immediate Index Index
Publication Date 5/1/2018	Pages 50
Journal/Publication Method Journal	Citation of Life Citation
Volume Volume 1	Impact Factor Major
Number 2	

**Files (0)**

[Upload Files](#)

Or drop files

- f. On the left-hand side, click on the pencil icons next to any line item to edit that information.
- g. On the right-hand side, click on the **Upload Files** button to upload any files or documents relevant to the publication. You may also drag and drop files from Windows into this area.
- h. When completed, return to the Cover Form by clicking on the arrow in the **Cover Forms** tab and selecting the Cover Form.



- i. Repeat this process as needed to add more publications to this section.

12. In the bottom right corner of the page is the **Eligibility Checklist**. Click on the pencil icon for any item in this section to check the boxes, ensuring that all eligibility requirements for this application have been met.

### Eligibility Checklist

- **Eligibility Criteria 1:** The nominated publication(s) has not been submitted to a previous STAA competition.
- **Eligibility Criteria 2:** The nominated publication(s) was published on or before January 1, 2018, and on or after January 1, 2013.
- **Eligibility Criteria 3:** The principal author was an EPA employee or a PHS employee assigned to EPA when the research was performed.
- **Eligibility Criteria 4:** The EPA author has submitted a "Record of Agreement" to attest that credit has been correctly assigned.

 **Required** 

Eligibility Criteria 1

Eligibility Criteria 2

Eligibility Criteria 3

Eligibility Criteria 4

13. Once you have completed filling out all items in this form, click the Submit Application form in the top right-hand corner of the page.

[Edit](#) [Submit Application](#)

The EPA's Science and Technological Achievement Awards (STAA) program promotes and recognizes scientific and technological achievement by employees.

The STAA review program is a long-standing partnership between the Agency and the EPA Science Advisory Board (SAB). Each year since 1980, Agency scientists and engineers have submitted nominated scientific and technological papers through an internal Agency review process managed by the Office of Research and



If any items in the form have not been filled out properly, an error message will appear on the screen and direct you back to the form.

## Approving Forms

When a cover form is submitted, the approver for this form will receive an email that it is ready for approval. To review and approve a form:

1. Click on the link in the email where it says, "Please click here to open the nomination application."
2. A browser window will open. If you are not already logged into BAP, you will be prompted to do so.
3. Once logged in, the approver will be shown the following approval screen:

Submitter	Date Submitted	Actual Approver	Assigned To
David Warner	Jun 1, 2018	David Warner	David Warner

To access more details or attachments for this form, click the link listed under "Record ID" below.

Approval Details	
ID	Owner
<a href="#">EPA-CF-0000000011</a>	David Warner
Citation ⓘ	Nominating Author
Enter Citation Here.	David Warner
Primary Research Category	Secondary Research Category ⓘ
Energy and the Environment (EE)	Control Systems and Technology (CS)

No Comments

Approve   Reject   Reassign

4. To see more details or attachments for the form, click the link shown under **ID** in the **Approval Details** selection.
5. To approve the form, reject the form, or reassign the form to another approver, click on the appropriate button in the top right-hand corner of the screen.

Approve   Reject   Reassign

6. For each button, a comment window will appear where the approver can leave comments about the form.
7. If the form is rejected, the submitter will be notified via email and be given an opportunity to change the form as needed and re-submit it.
8. If the form is approved, the submitter will be notified via email.