



SRA INTERNATIONAL
ANNUAL MEETING
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Streamlining Research Administrator Workflows with Trello and Atom Grants

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Learning Objectives

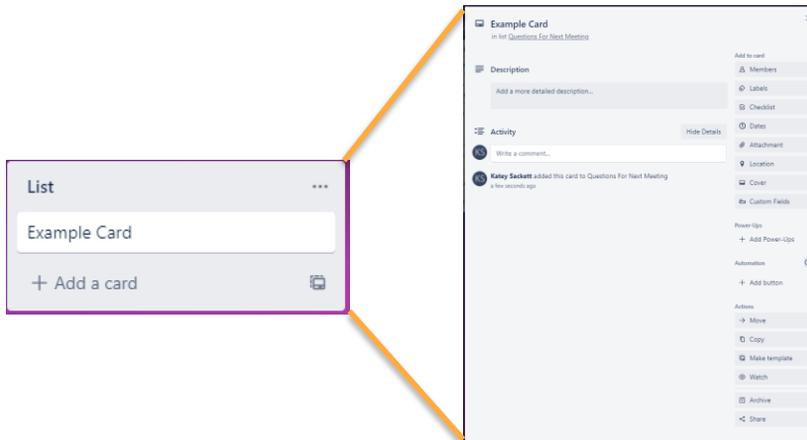
1. Learn how Trello can be used to organize Research Administration workflows and automate certain processes.
2. Understand how additional integrations like Atom can improve funding searches and streamline proposal development.

What is Trello?

- A visual collaboration and project management tool that helps teams organize their work
- Manages any type of project, workflow, or task tracking

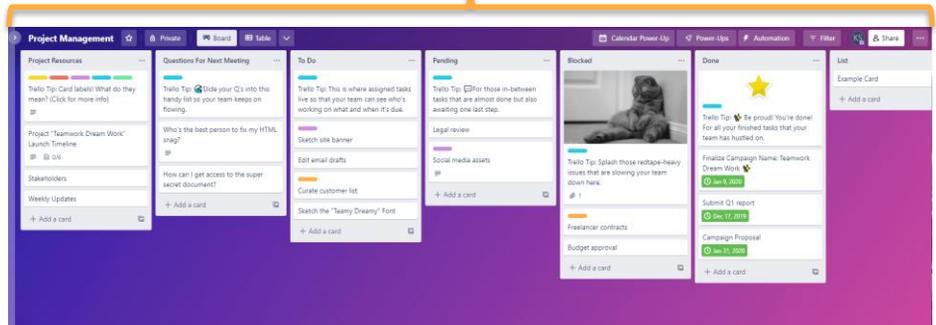
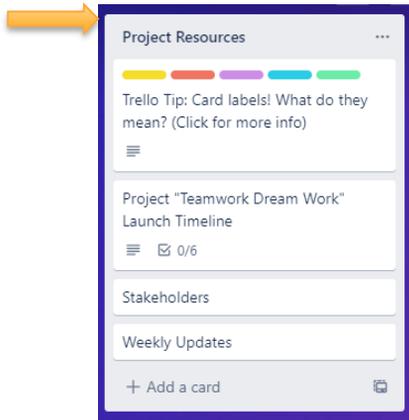
Back to the Basics

- Workspaces > Boards > Lists > Cards
- Cards are the base unit, either representing individual tasks or entire projects.
- Cards can have members, labels, checklists, attachments, comments, and more.



Back to the Basics pt. II

- Lists hold stacks of cards and illustrate stages or processes
- Boards can be collaborative, and be a general workspace for team members or reflect individual portfolios



Back to the Basics pt. III

- Actions can be automated through the use of Rules, Buttons, or Scheduled Commands.
- Sponsor checklists can be automatically added to proposal cards, emails can be sent to PIs for reporting reminders, cards can be created from webforms

Rules ⌵ All 👤 Create Rule

🔍 Workflow 📄 ✎ 🗑️ 🔍 + Add to anot... *Enabled on 8 boards, last modified a year ago*

when a card is added to list "Proposal Development" by anyone, add the "Budget checklist" checklist from card "Checklists" to the card, and add the "PRF Checklist" checklist from card "Checklists" to the card

Enabled on this board

Board Buttons ⌵ All Create Button

🔍 Email Boss 📄 ✎ 🗑️ 🔍 *Last modified a few seconds ago*

send an email notification to "kxssrs@rit.edu" with subject "Progress Report" and message "Here is my updated board for our 1:1"

Enabled on this board Enabled on all boards on this workspace Shared with workspace

Card Buttons ⌵ All Create Button

🔍 File 📄 ✎ 🗑️ 🔍 *Last modified a few seconds ago*

move the card to the top of list "Done"

Enabled on this board Enabled on all boards on this workspace Shared with workspace

Scheduled Commands ⌵ All 👤 Admin 👤 Create Command

🔍 📄 ✎ 🗑️ 🔍 + Add to another bo... *Enabled on 1 board, last modified a year ago*

every day, sort the list "Completed" by time in list ascending

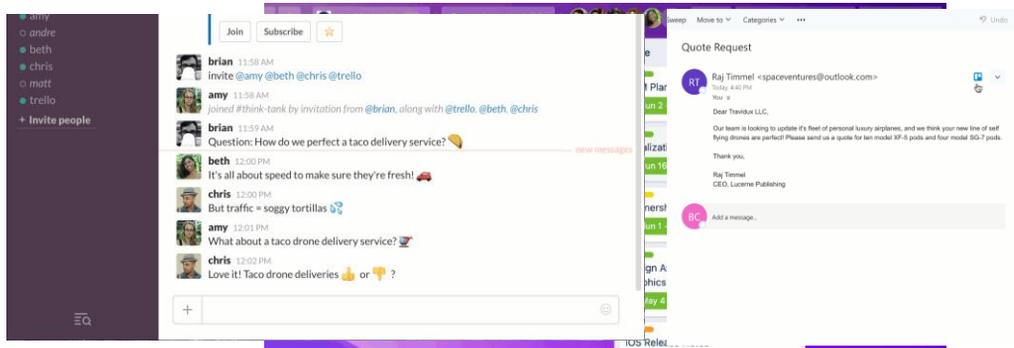
Enabled on this board

How can it help me?

- A team member is out on an emergency with deadlines approaching...
- A last-minute request came in and you don't know who has worked on this program in the past...
- Your VP asks for an update on all proposals in progress across the team...
- You're tasked with assessing project distribution and whether to adjust portfolios or centralize...
- You're onboarding new research administrators with 0 experience in proposal building or your institution's approval process...
- Your office is in a fully remote or hybrid model and you no longer hold quick "check-ins" with colleagues...

Clarity, Efficiency, & Automation

- Add agency-specific checklists to your proposals automatically.
- Streamline or eliminate meetings on proposal progress.
- Request help with a click of a button.
- Automatically send emails to team members, supervisors, PIs, or anyone else with updates or reminders.
- Link cards to Google Drives and shared folders for one-click access.
- Start proposals from Slack conversations, emails, or webform completions

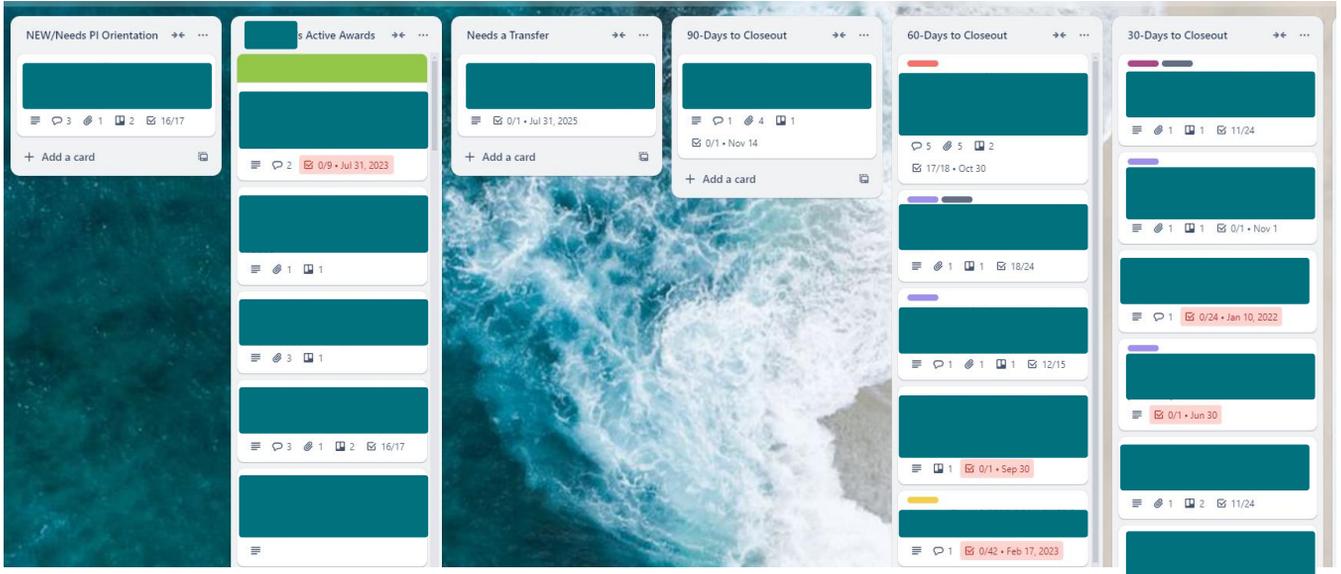


Pre-Award

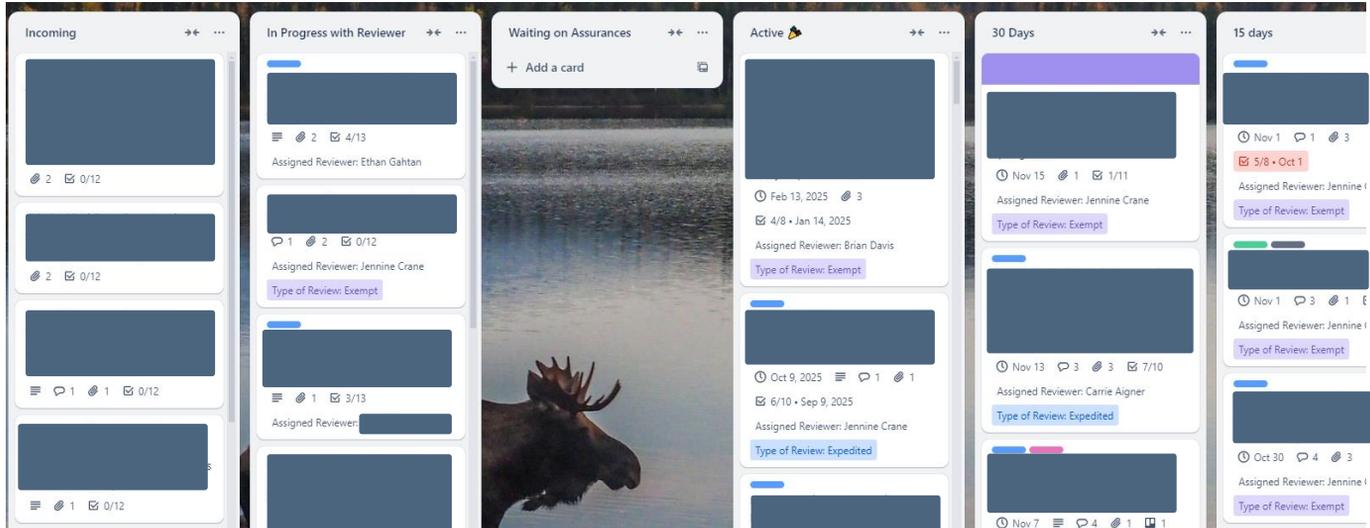
The image displays a Kanban board for the 'Pre-Award' process, organized into six columns: Project Initiation, Proposal Development, PRF Routing, PRF Approved, Submission, and File Processing. Each column contains cards representing individual proposal items, with progress bars at the top and detailed information below. The background of the board is a misty forest scene.

Column	Card	PRF Due Date	Proposal Type	Expiration Date
Project Initiation	1	Jun 30	Full Proposal	Oct 28
	2	Jul 18	Full Proposal	Nov 15
	3	Aug 15	Full Proposal	Dec 13
Proposal Development	4	May 19	Full Proposal	Aug 29
	5	Jun 9	Full Proposal	Aug 29
PRF Routing	6	Jun 16	Full Proposal	Oct 14
	7	Jun 6	Full Proposal	Sep 28
Submission	8	Jun 8	Full Proposal	Sep 16
	9	Jun 1	Full Proposal	Sep 29
File Processing	10	May 19	Supplement	Sep 16
	11	Jun 1	Full Proposal	Sep 29

Post-Award



IRB



Subawards

The image displays a Kanban board for 'Subawards' with six columns. Each column contains cards representing different stages of the process. The cards include checklists of tasks and their completion status.

- INCOMING:** 1 card with 1 icon. Checklist: Confirmed Scope of Work, Confirmed Budget.
- PENDING RISK ASSESSMENT:** 2 cards. Card 1: Jul 3, 1 icon. Checklist: Confirmed Scope of Work, Confirmed Budget, Risk Assessment Complete, Prime Award Received. Card 2: Feb 3, 2025, 6 icons. Checklist: Confirmed Scope of Work, Confirmed Budget, Risk Assessment Complete, Prime Award Received.
- PENDING PI ORIENTATION:** 1 card with '+ Add a card' button.
- PENDING INFO FROM PI/SUB:** 3 cards. Card 1: 1 icon. Checklist: Confirmed Scope of Work, Confirmed Budget. Card 2: 1 icon. Checklist: Confirmed Scope of Work, Confirmed Budget. Card 3: 1 icon. Checklist: Confirmed Scope of Work, Confirmed Budget.
- DRAFT IN PROGRESS:** 3 cards. Card 1: 1 icon. Checklist: Confirmed Scope of Work, Confirmed Budget, Risk Assessment Complete, Prime Award Received. Card 2: 1 icon. Checklist: Confirmed Scope of Work, Confirmed Budget. Card 3: 1 icon. Checklist: Confirmed Scope of Work.
- SENT FOR SIGNATURE:** 3 cards. Card 1: Aug 5, 3 icons. Checklist: Confirmed Scope of Work, Confirmed Budget, Risk Assessment Complete, Prime Award Received. Card 2: Aug 5, 2 icons. Checklist: Confirmed Scope of Work, Confirmed Budget, Risk Assessment Complete, Prime Award Received. Card 3: 4 icons. Checklist: Confirmed Scope of Work.

Research Development & Central Offices

Newsletters/Bulletins

- Fall Newsletter
Nov 5 | 3 comments | 2 likes
6/33 • Oct 8
- Add somewhere to newsletter: What steps must you take BEFORE acquiring IT products or services (even if free)?
1 comment | GB

Internal Competitions / GRFP

- Graduate Research Fellowship Program
GRFP 2024
Sep 2 | 15 comments | 7 likes
3/8
- Research, Scholarship, & Creative Activities (RSCA)
Research, Scholarship, & Creative Activities (RSCA)
Sep 20 | 5 comments | 4 likes
20/27 • Oct 22

KRONOS Trainings/Resources/FAQ's

- KRONOS Training Videos for HR Actions
- Process and Workflows
5 comments
- Dashboard layout
1 comment

I9 Verification

- I9 Verification Log
1 comment
Show attachments trial expired in Settings
- Open New Hire Checklist
1 comment
Show attachments trial expired in Settings
- + Add a card

Terminations

- Smith, John
This card is a template.
- Re: How to terminate an employee on an SPF project
Status: Sensitive
Secondary Status: Stateside person
PTO Payout: N/A
- + Add a card

Power-Ups

- Power-ups are additional integrations that can help with certain functions.
- They can work on Cards or Boards
- You can connect your office calendar, attach Google drive files and so much more.



Google Drive

Add

Access your Drive files for a project directly from its card, or create and attach new Drive files to a card.

 2,000,000+



Slack

Add

Connect your communication and collaboration apps so that no ideas or tasks fall through the cracks.

 500,000+



Outlook Calendar for Trello

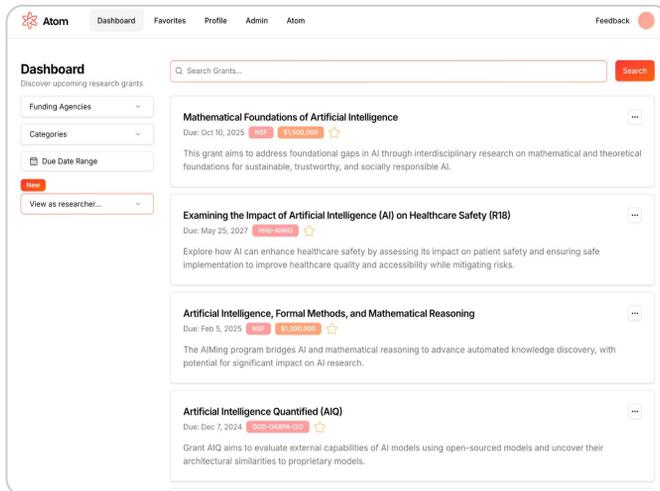
Add

A Power-Up to bring your Outlook Calendar and Trello Tasks under one view.

 1,000+

Atom Grants

- Atom is an **AI-powered** grant discovery platform
- Powered by a **semantic search** engine, a more intuitive approach than keyword search



The screenshot displays the Atom Grants dashboard. At the top, there is a navigation bar with the Atom logo and links for Dashboard, Favorites, Profile, Admin, and Atom. A Feedback button is located in the top right corner. Below the navigation bar, the main content area is titled "Dashboard" with the subtitle "Discover upcoming research grants". A search bar labeled "Search Grants..." is positioned at the top right of the dashboard. On the left side, there are several filter options: "Funding Agencies", "Categories", "Due Date Range", and "View as researcher...". The main content area lists four grants:

- Mathematical Foundations of Artificial Intelligence**
Due: Oct 10, 2025 | NSF | \$1,000,000 | Star icon
- Examining the Impact of Artificial Intelligence (AI) on Healthcare Safety (R18)**
Due: May 25, 2027 | NSF-AMHQ | Star icon
- Artificial Intelligence, Formal Methods, and Mathematical Reasoning**
Due: Feb 5, 2025 | NSF | \$1,000,000 | Star icon
- Artificial Intelligence Quantified (AIQ)**
Due: Dec 7, 2024 | DOD-DARPA-DCO | Star icon

How can Atom Grants help?

- Find grants with **natural language searching** e.g use paper abstracts, grant proposals, etc.
- **Effortless faculty onboarding** with auto-generated researcher profiles.
- **Drive engagement** with personalized grant emails sent directly to faculty.
- **Save time with AI-generated** grant synopses, personalized grant eligibility summaries, and submission file checklists.
- Integrates with grant management tools, e.g. Trello.
- Supports limited submission workflows and finding collaborators.

Dashboard

Discover upcoming research grants

Funding Agencies



Categories



Due Date Range

New

View as researcher...



Search Grants...

Search

Mathematical Foundations of Artificial Intelligence

Due: Oct 10, 2025 NSF \$1,500,000

This grant aims to address foundational gaps in AI through interdisciplinary research on mathematical and theoretical foundations for sustainable, trustworthy, and socially responsible AI.



Examining the Impact of Artificial Intelligence (AI) on Healthcare Safety (R18)

Due: May 25, 2027 HHS-AHRQ

Explore how AI can enhance healthcare safety by assessing its impact on patient safety and ensuring safe implementation to improve healthcare quality and accessibility while mitigating risks.



Artificial Intelligence, Formal Methods, and Mathematical Reasoning

Due: Feb 5, 2025 NSF \$1,200,000

The AIMing program bridges AI and mathematical reasoning to advance automated knowledge discovery, with potential for significant impact on AI research.



Artificial Intelligence Quantified (AIQ)

Due: Dec 7, 2024 DOD-DARPA-I2O

Grant AIQ aims to evaluate external capabilities of AI models using open-sourced models and uncover their architectural similarities to proprietary models.



Dashboard

Discover upcoming research grants

Funding Agencies

Categories

Due Date Range

New

View as researcher...

Q Artificial neural network is a very important part in the new industry of artificial intelligence. In China, there are many researches on artificial neural network and artificial intelligence are developing rapidly. Therefore, this paper reviews and summarizes artificial neural network, and hopes that readers can get a deeper understanding of artificial neural network. This paper first reviews the development history of artificial neural network and its related theory, and introduces four major characteristics of artificial neural network, such as the non-linear, non-limitative, non-qualitative and non-convex. Then it emphatically analyzes its application in information, medicine, economy, control, transportation and psychology. Finally, the future development trend of artificial neural network is prospected and summarized.

Search

Mathematical Foundations of Artificial Intelligence

Due: Oct 10, 2025 NSF \$1,500,000 ☆

This grant aims to address foundational gaps in AI through interdisciplinary research on mathematical and theoretical foundations for sustainable, trustworthy, and socially responsible AI.

Examining the Impact of Artificial Intelligence (AI) on Healthcare Safety (R18)

Due: May 25, 2027 HHS-AHRO ☆

Explore how AI can enhance healthcare safety by assessing its impact on patient safety and ensuring safe implementation to improve healthcare quality and accessibility while mitigating risks.

Humanities Research Centers on Artificial Intelligence

Due: Dec 11, 2024 NEH \$500,000 ☆

NEH seeks applications for centers exploring ethics, law, and society in AI tech.

Science of Learning and Augmented Intelligence (SL)

Due: Feb 12, 2025 NSF ☆



Atom University Admin Dashboard

Manage professors, research interests, and grants

[Researchers](#)
[Admin Team](#)

 [View](#)
[Add Researcher +](#)

Name	Email	Department	Num. Research Interests	Last Visit	
Mishkat Bhattacharya	tomermish@atomgrants.com	Physics and Astronomy	3	-	Resend Invite
Derek Daniels	tomerderek@atomgrants.com	Neuroscience	3	-	Resend Invite
James B. Dent	tomermish@atomgrants.com	Physics	3	-	Resend Invite
Roman Kondratov	tomermish@atomgrants.com	Biological, Geological, and Environment	3	-	Resend Invite
Hamilton Evans	hamdemo@atomgrants.com	Computer Science	1	6 days ago	...
Hamilton T Evans	tomermish@atomgrants.com	Chemistry	1	-	Resend Invite

 Rows per page

Page 1 of 1



[< Back](#)

Add New Researcher

Fill out the basic information for the new researcher.

Full Name*

Email*

Department*

Job Title*

OrcidId (optional)

Add Researcher

[< Back](#)

Mathematical Foundations of Artificial Intelligence

Due: Oct 10, 2025

NSF

\$1,500,000

[Chat with RFP](#)[Submit to Trello](#)

Description

Machine Learning and Artificial Intelligence (AI) are enabling extraordinary scientific breakthroughs in fields ranging from protein folding, natural language processing, drug synthesis, and recommender systems to the discovery of novel engineering materials and products. These achievements lie at the confluence of mathematics, statistics, engineering and computer science, yet a clear explanation of the remarkable power and also the limitations of such AI systems has eluded scientists from all disciplines. Critica...

[Read more](#)

Estimated Total Program Funding

\$8,500,000

Award Ceiling

\$1,500,000

Award Floor

\$500,000

Eligible Applicants

- Others

Additional Eligibility Information

Who May Submit Proposals:

- Proposals may only be submitted by the following: -Non-profit, non-academic organizations: Independent museums, observatories, research laboratories, professional societies and similar organizations located in the U.S. that are directly associated with educational or research activities. - Institutions of Higher Education (IHEs) - Two- and four-year IHEs (including community colleges) accredited in, and ...

[Read more](#)

Eligibility

Profile

>  Interests>  Position

Finance

>  Value

Other

>  Location

Grant Checklist New

15 items >

Similar Grants

Artificial Intelligence, Formal Methods, and Mathematical Reasoning

Due: Feb 5, 2025

NSF

\$1,200,000

Science of Learning and Augmented Intelligence (SL)

Due: Feb 12, 2025

NSF

Smart Health and Biomedical Research in the Era of Artificial

Live Demo

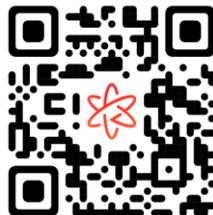


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Sign up to join the email list for
my virtual Trello webinars



Learn more about Atom
Exhibitor Hall – Booth 305
Scan to book a demo

Questions?