Proposals

A-5. Entering required data on the Proposal Resources page (v8.9)

The Proposal Resources page stores information about each resource for a project. Resources are the labor, equipment, services and facilities used for the proposed research. They include the performance sites, resources and the extent of their availability to the project (e.g. laboratory, animal, computer, office, major equipment, and other).

Resources Section (This section resembles information on the NIH 398 Resources Page, but not required otherwise):

1. Multiple resource rows can be added by clicking the + button.
2. Type – Enter each resource type:
   - ANIMA Animal
   - CLINI Clinical
   - COMPU Computer
   - LABOR Laboratory
   - MAJOR Major Equipment
   - OFFIC Office
   - OTHER Other Resources
   - RESOU Other Resources (NSF Specific)
   - SUBS Subrecipients - DO NOT USE
3. **Comments** – Enter a description of each resource.

4. **Subrecipient** (subcontract) - Identifies those collaborating entities (institutions) having responsibility for programmatic decision-making and performance responsibility.

5. **Subrecipient** – New in 8.9: you **must** use lookup icon to enter subrecipient. Names can no longer be typed in (to add a new subrecipient visit: www.udel.edu/procurement/forms/vendoradd.html.)

   Hint: use the “**contains**” feature of the search box with the Name 1 field for better Search Results.

6. **Agreement Detail icon** – *(Optional, not required by RO or the UD Financials system)* - Click to access additional subrecipient data such as agreement category, beginning and ending date, recipient status, etc.

7. **Subrecipient Budget icon** *(new in 8.9)* - this is where the detailed subrecipient budget is entered

8. **Subrecipient Budget page** – enter Budget Items and Total Direct Budget amounts.

9. Click the **+** button to add a new line(s)
10. Click the OK button

11. **Professionals:** Enter **all** key personnel in the proposal.
   - **IMPORTANT** – enter all PI’s, Co-PI’s and other Key Personnel. This information is used in the Current and Pending Reports and in the budgeting process.

12. PI **Name and ID** number default to these fields from **Proposal** page.
   a. If the person in **not** a UD employee, just type the name in the **Name** box using the “Lastname, Firstname” convention for names (comma after the last name).
   b. If the participant(s) is unknown at this point, enter “Named, To Be” (no space after the comma).

13. **Role** – use the lookup icon to select the appropriate role for this professional

14. **Details Icon** - Click on the icon to display the page into which all Professional Data must be loaded. This brings up “**Professional Details**” page (see: page 5).

15. **Credit %** and **Workflow Eligible** – these two fields can be ignored

16. **Research checkbox** – leave this checked on

17. Add more individuals by using the button
18. Select the **Professional** by entering the person’s **Employee ID** (fastest method) or using the lookup icon
19. **Role** - use the lookup icon to select one
20. Click on the **Details** icon to **Professional Details** page
Professional Details

a. **Project Role** – Leave blank unless the **Role** is “Key Personnel” or “Other” in which case you should enter the appropriate description (e.g. graduate student, post doc, consultant, etc.)

b. **Role Type** – Select role the professional will have on the project.
   - **Co-PI** (for other than NIH proposals)
   - **Key Personnel**
   - **Other** (e.g. research technician, consultant)
   - **PI**

c. **PI Check Boxes** – Click if any apply.
   - **Eligible PI** (greyed out) - Set in the Professionals page by RO or the Employee Demographic Data webform.
   - **First Time PI** – Check if applicable, some sponsors want this information.
   - **PI Eligibility Waiver*** – Used when **Role** of “PI” is chosen for a person who doesn’t have “Eligible PI” status. (This field is only accessible when the PI does not meet UD PI requirements.)
   - **New Personnel** – Check this when person is not yet in HR system and will be a UD employee in the future.

d. **More Detail Links (Address, Education, etc.)** – Click on the links to load professional data required by the sponsor.
   - As an example, click in the **Experience** link. (see: page 6).

e. **Additional Information** – Enter any misc. information needed using **Type** dropdown and text box.

*To use **PI Eligibility Waiver** you must: 1) select the **Role** of PI from the drop-down list, 2) click the **OK** button, 3) acknowledge the WARNING message, 4) click the **Edit Details** icon again, 5) click the **PI Waiver checkbox** and 6) Click **OK** button.
• Click the **Load** button to prompt the system to load ALL existing professional data from the work experience. Delete unwanted rows by using the “−” button.

• **OR** you can choose selected work experiences from the lookup list; use the button to add additional ones. Use this method when a person has MANY entries in an area such as Publications. (NOTE: new work experiences not in PeopleSoft are added by the Employee Demographic Data webform).

• Click the **OK** button to go back to the **Proposal Professional Details** page.

(NOTE – The only links that have data in them are: Education, Job, Publications, and Pending Support.)
• This same process should be used to load all the other professional data.
• Click the other links to load other professional data.
• All professional demographic data will be entered into UD Financials using the Employee Demographic Date webform. (The only exception is new hires, which have this data entered by the JED/New Hire webform.)
• Click the OK button after loading all professional data to return to main page.
21. Click **Save** button (if you have already entered the required data on the **Proposal**, **Projects**, and **Key Words** pages, and verified the information on the **Location** page).

22. This proposal has multiple **Projects**, use the button to go to the 2\textsuperscript{nd} Project.
22. The 2 of 2 indicated this is the second Project, note the new Title.
23. Enter Resources, Subrecipients and Professionals data to this additional project. Repeat steps #1 to #21.
24. **NOTE** – The PI from the first Project defaults into the Professionals section, you may change this to another PI or Co-PI.
25. Click Save button after adding any Resource, Subrecipient or Professional information.