Proposals

A-5. Entering required data on the Proposal Resources page

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).

Resource Section (This section can mirror the resources document of the sponsor application, but is 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.

IMPORTANT - Each project has its own set of Resources, Subrecipients and Professionals. Click on the left and right blue arrows to display the other projects to enter appropriate.
4. **Subrecipients** (subcontracts) - Identifies those collaborating entities (institutions) having responsibility for programmatic decision-making and performance responsibility.

5. **Subrecipient** - Use lookup icon to enter subrecipients.

(Visit [http://www.udel.edu/procurement/forms/vendoradd.html](http://www.udel.edu/procurement/forms/vendoradd.html) to add a new subrecipient. Procurement will need the organization’s W-9.)

6. **Agreement Detail** icon – *(Optional)* - Click to access additional subrecipient data such as agreement category, beginning and ending date, recipient status, etc.

7. **Subrecipient Budget icon** - 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.

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

13. **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).

14. **Roles**
   - **Other Role** – use the lookup icon to select the appropriate role for this professional. All involved faculty must have an Other Role of PI, Co-PI or Key, regardless of their role on the sponsor application. Those roles are the only ones that will appear on the Proposal Approval Summary webform (via the budget) so that committed effort can be approved.
   - **Contact PI**
   - **Primary PI**
   - **Reporting Roles**

15. **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 4).

16. **Credit %** – leave blank

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. **Other Role** - use the lookup icon to select one. All involved faculty must have an “Other Role” of PI, Co-PI or Key, regardless of their role on the sponsor application. Those roles are the only ones that will appear on the Proposal Approval Summary webform (via the budget) so that committed effort can be approved.

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 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 OVPR 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 on the Resources page, 2) acknowledge the WARNING message, 3) click the Edit Details icon, 4) click the PI Waiver checkbox and 5) 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 Data 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 2nd 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.