Proposals

A-3. Entering required data on the Proposal Location link (v8.9)
(bottom of screen)

The Proposal Location page stores the address information for the site where the research work will be performed. This information maps to Form Page 2 of the PHS 398 as performance sites.

New in v8.9:
• Location is no longer a tab at the top; it is now a link at the bottom of the other pages (Note: after the Location link is opened it does appear at the top as a tab.)
• Location information auto-populates based on the PI’s location. This helpful feature means in most cases you will be checking the data on this page rather than entering it.
• Location information can be changed if necessary.

1. Click the Location link at the bottom of the page.
2. Notice there is now a tab called **Location** at the top (FYI - the tab is only temporary)

3. The information defaults into this page based on the PI – **verify this data is OK.**
   - If everything is OK, you are done with **Location**
   - Go to the next required link – **Key Words**

4. **If you need to change the location**, click the lookup icon on the **Location** field

**Location Code** – Select a location code using the lookup button.
- To narrow your search, type the building name (E.G. “alison”) in **Description** and room number in **Room #** (numbers are four digits, Room 101 should be entered 0101).
  - Click the “**Lookup**” button
  - Double-click on the correct location code in the **Search Results** to select.
  - When a location is selected, the system populates the address information.
FYI: The address fields “gray-out” if you use the lookup to change the Location

5. **Foreign** – Designates whether the location is outside the United States. Click box if applicable.
6. **Address** fields – default based on the Location code.
7. **Phone, Ext** and **Fax** – *(leave blank)*
8. When you are done with Location, click on the **Keywords** link *(new in 8.9 – you cannot save the proposal until the Key Words page is completed)*

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**Off-Campus locations** – when more than 50% of the work, excluding sub-contracts, will be performed off UD’s campus, then the location code will be OFF_CAMPUS. There are two ways to enter this in the Location field:

- Type OFF_CAMPUS in the Location field
- OR Use the “lookup” icon, which brings up this search box. Type “off” in the Description field and click “Lookup” button.
- Double-click the “OFF_CAMPUS” in the Search Results.
Adding Locations for Multiple Projects

9. Note the “1 of 2” on the Proposal Projects section. This means that this proposal has two projects. You MUST verify the location for each project.
   • Click the blue arrow button to navigate to the second project’s Location.
   • Now you should be on the second Project, it will display “2 of 2”

10. The Location defaults to the same one as the first Project. Click the “lookup” icon to change the second Project’s location.
In this example the location for Biological Sciences was entered for Project NEXT_2.

11. Enter the Location “0000005214” OR use the “lookup” icon to search for Wolf Hall and Room 118 (remember this is room 0118 in UD Financials.)

12. Click the Keywords link (new in 8.9 – you cannot save the proposal until the Key Words page is completed)