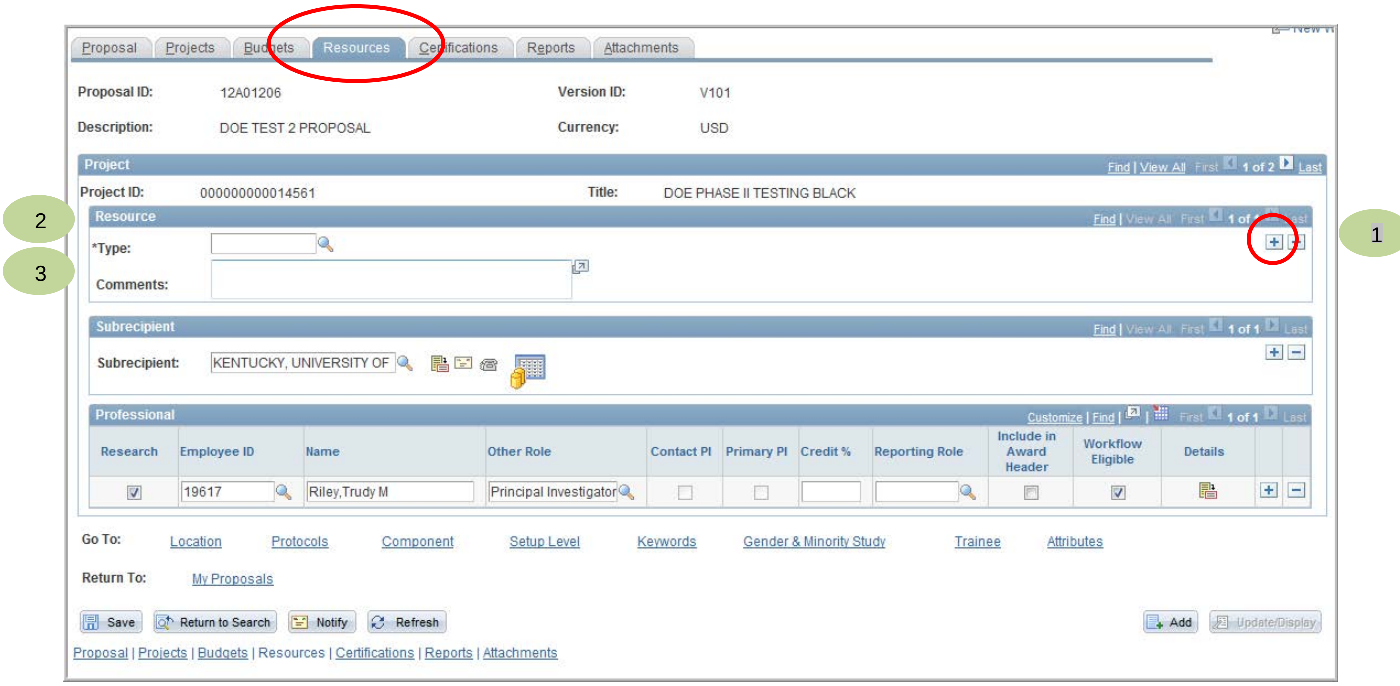
Proposals

A-5. Entering required data on the Proposal <u>Resources</u> page

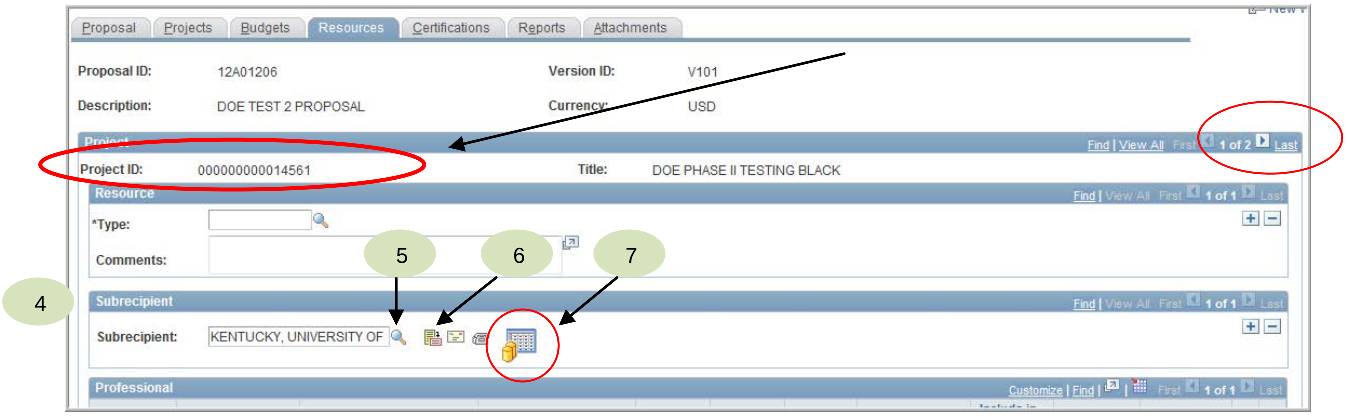
The Proposal **Resources** page stores information about each resource for a project. Resources are the labor, equipment, services and facilities used for the proposed research. They include the performance sites, resources and the extent of their availability to the project (e.g. laboratory, animal,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



Resource Section (This *section* can mirror the resources document of the sponsor application, but is not required otherwise)**:**

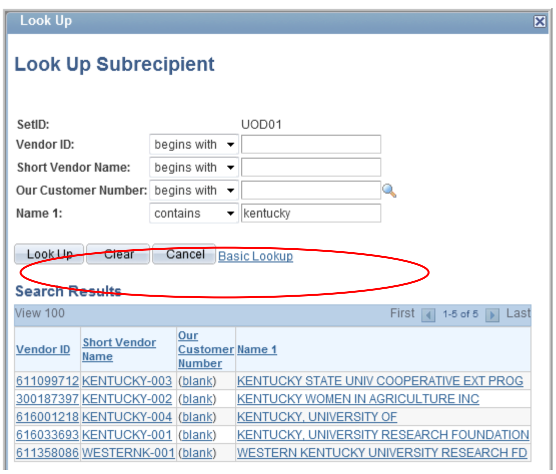
1. Multiple resource rows can be added by clicking the [+] button.
2. **Type** – Enter each resource type:
   - ANIMA Animal
   - CLINI Clinical
   - COMPU Computer
   - LABOR Laboratory
   - MAJOR Major Equipment
   - OFFIC Office
   - OTHER Other Resources
   - RESOU Other Resources (NSF Specific)
   - 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 to add a new subrecipient. Procurement will need the organization's W-9.)



Look Up Subrecipient

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

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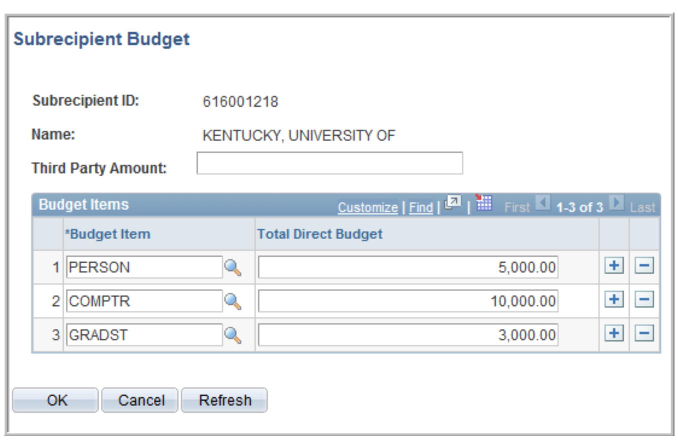
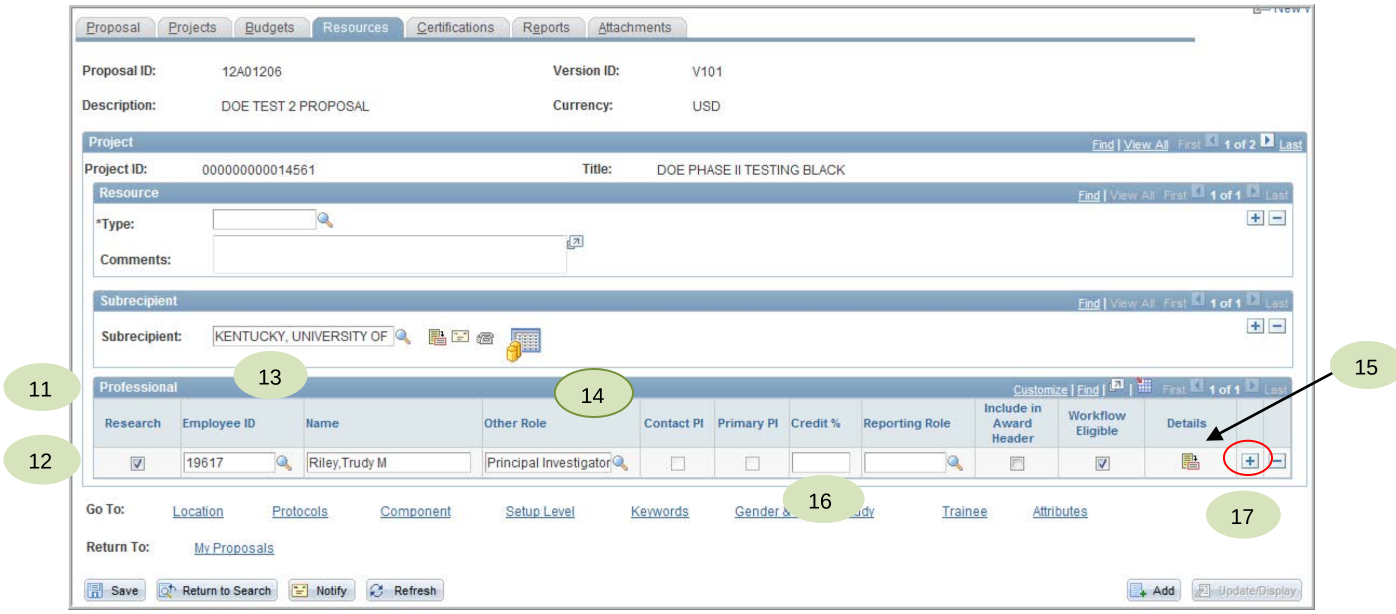
6. **Agreement Detail icon** – ***(Optional)*** - Click to access additional subrecipient data such as agreement category, beginning and ending date, recipient status, etc.



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

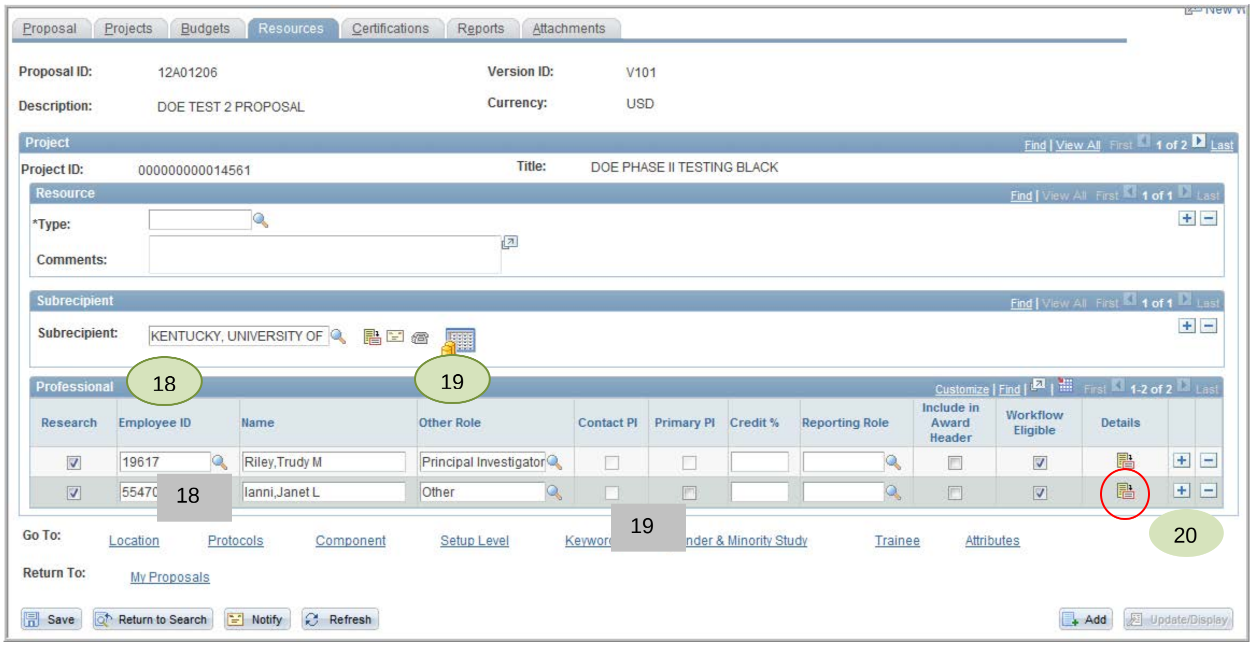
13. PI **Name** and **ID** number default to these fields from **Proposal** page.
    a. If the person in *not* a UD employee, just type the name in the **Name** box using the "Lastname, Firstname" convention for names (comma after the last name).
    b. If the participant(s) is unknown at this point, 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

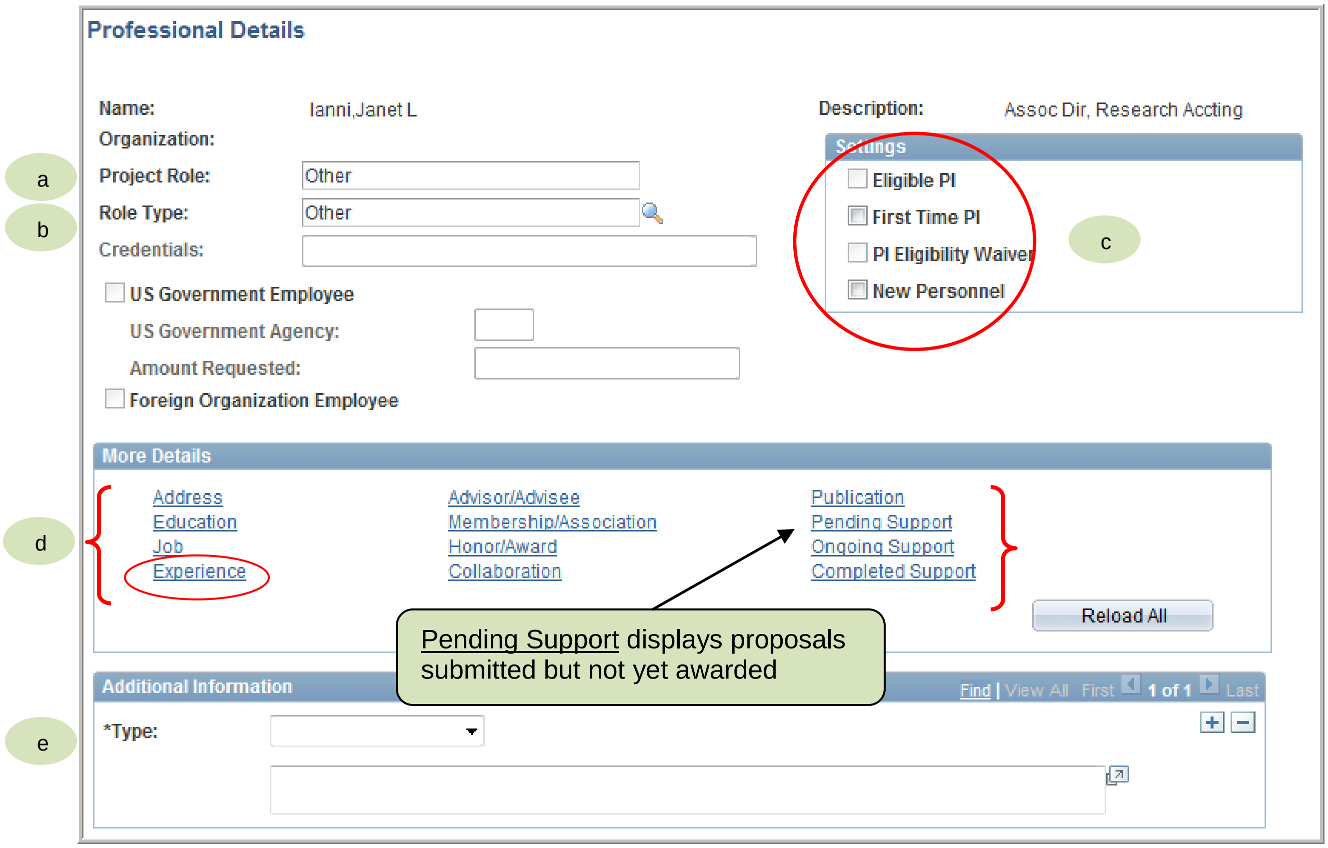
17. Add more individuals by using the button



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.

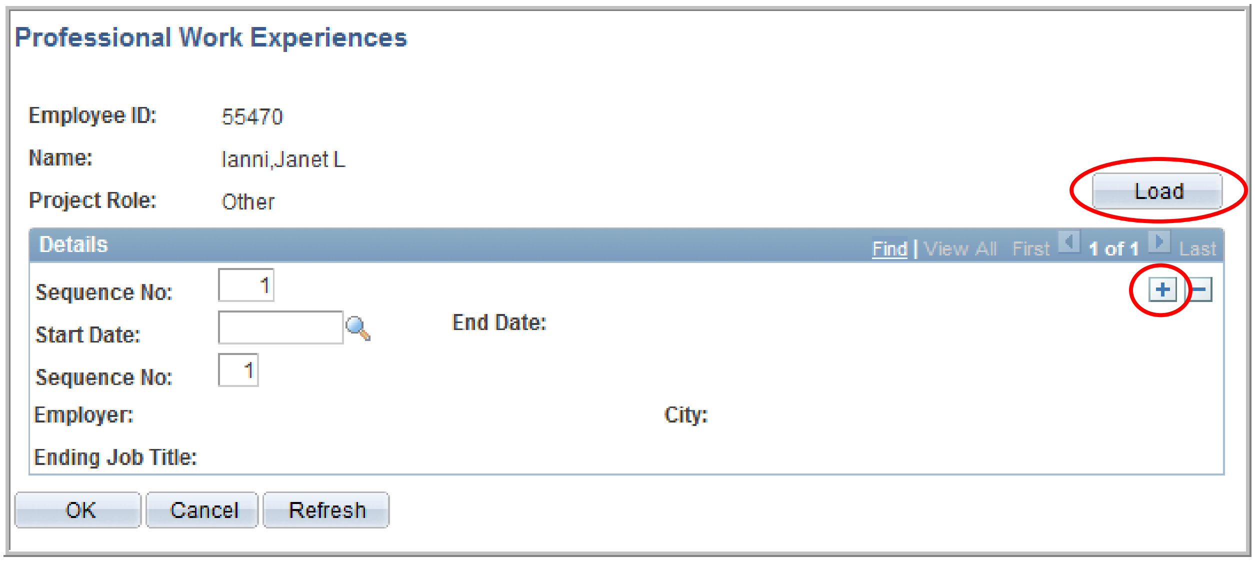
- **Eligible PI** (greyed out) - Set in the Professionals page by OVPR or the Employee Demographic Data webform.
- **First Time PI** – Check if applicable, some sponsors want this information.
- **PI Eligibility Waiver*** – Used when **Role** of “PI” is chosen for a person who doesn’t have “Eligible 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.

  o As an example, click in the **Experience** link. (see: page 6).

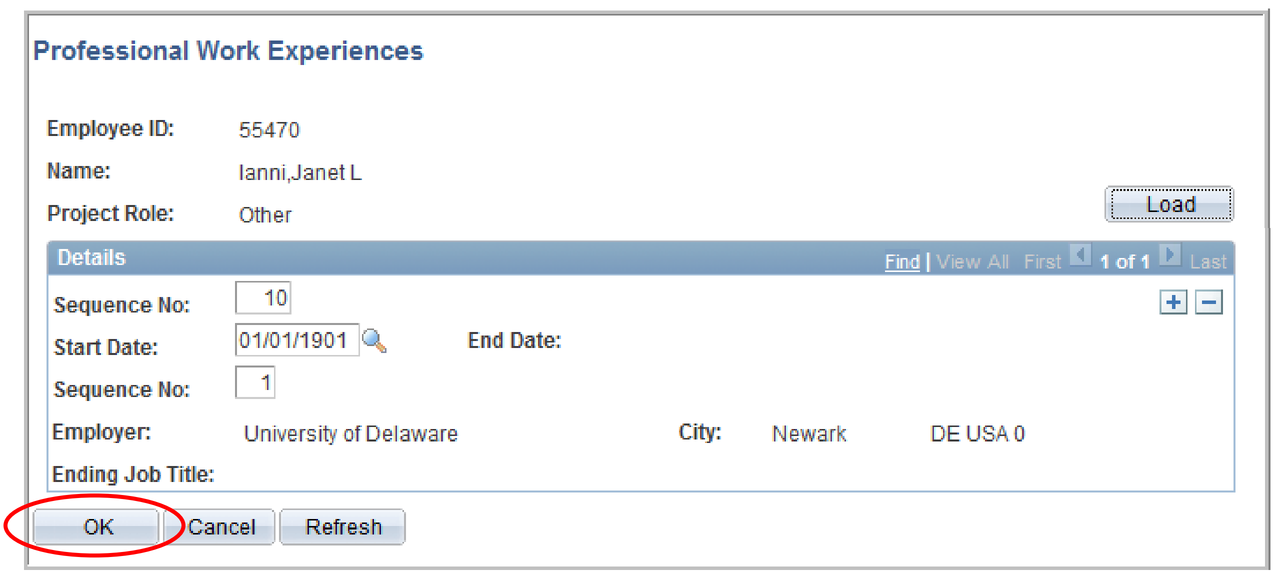
e. Additional Information – Enter any misc. information needed using **Type** dropdown and text box.

*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.



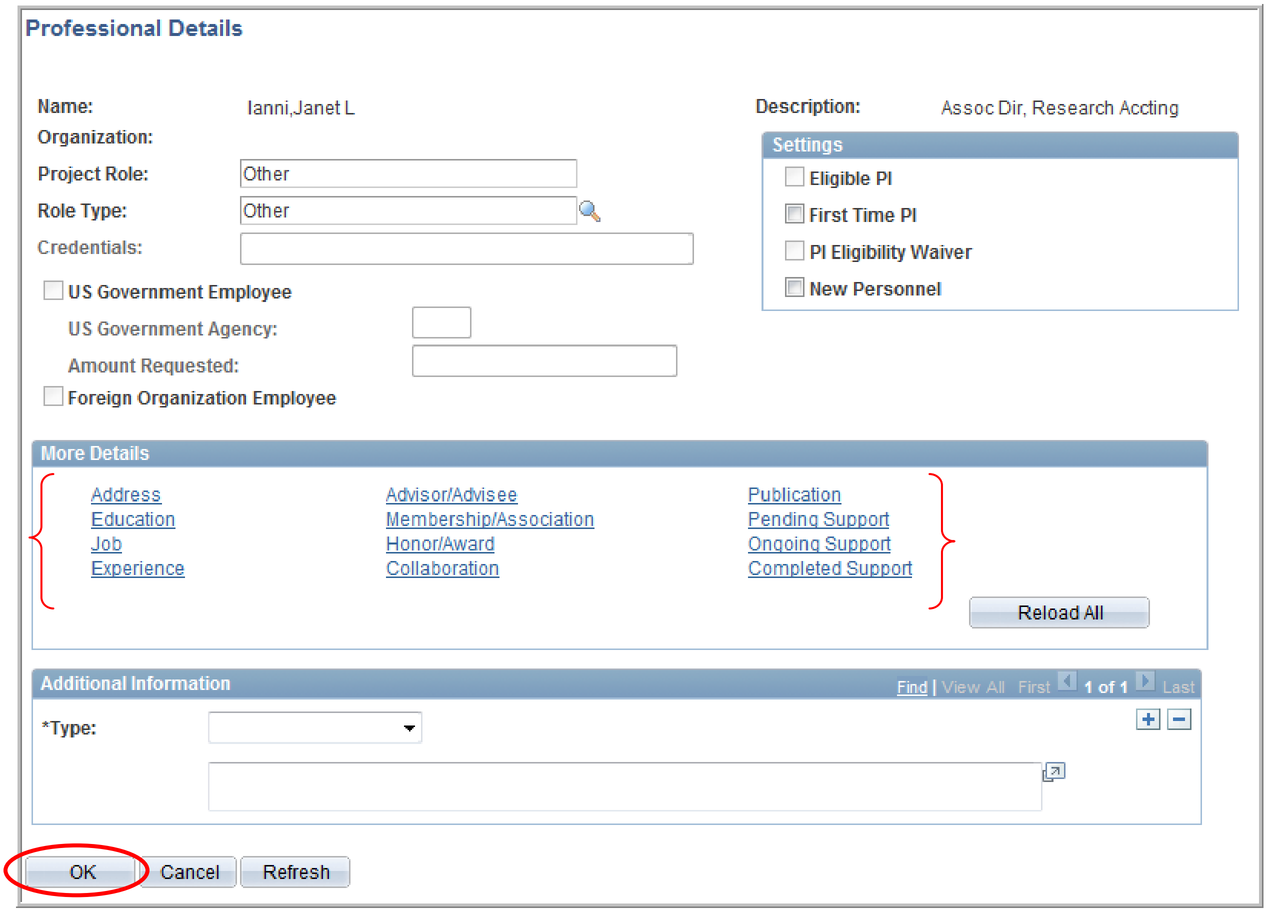
- Click the **Load** button to prompt the system to load ALL existing professional data from the work experience Delete unwanted rows by using the "–" button.
- **OR** you can choose selected work experiences from the lookup list; use the + button to add additional ones. Use this method when a person 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.)


Professional Details

Name: Ianni,Janet L
Description: Assoc Dir, Research Accting
Organization:
Project Role: Other
Role Type: Other
Credentials:
US Government Employee
US Government Agency:
Amount Requested:
Foreign Organization Employee

Settings
Eligible PI
First Time PI
PI Eligibility Waiver
New Personnel

More Details
Address
Education
Job
Experience
Advisor/Advisee
Membership/Association
Honor/Award
Collaboration
Publication
Pending Support
Ongoing Support
Completed Support
Reload All

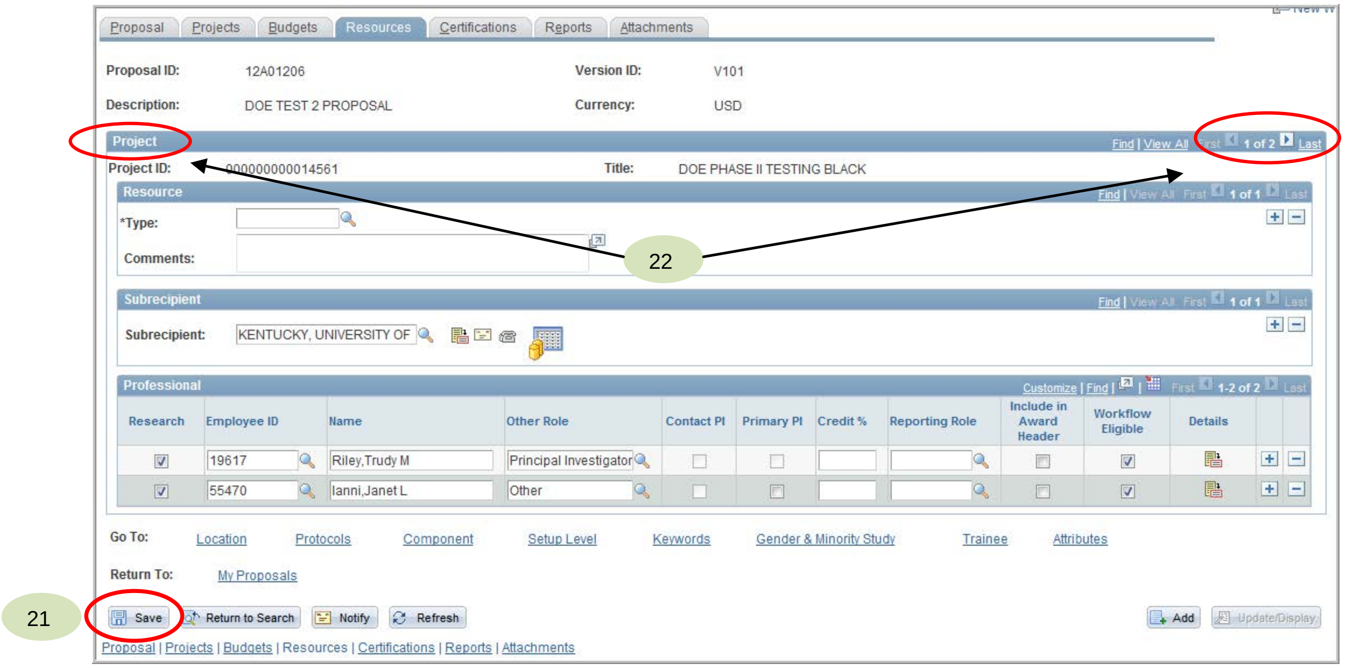
Additional Information
Find | View All First 1 of 1 Last
*Type:

OK Cancel Refresh

- 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.

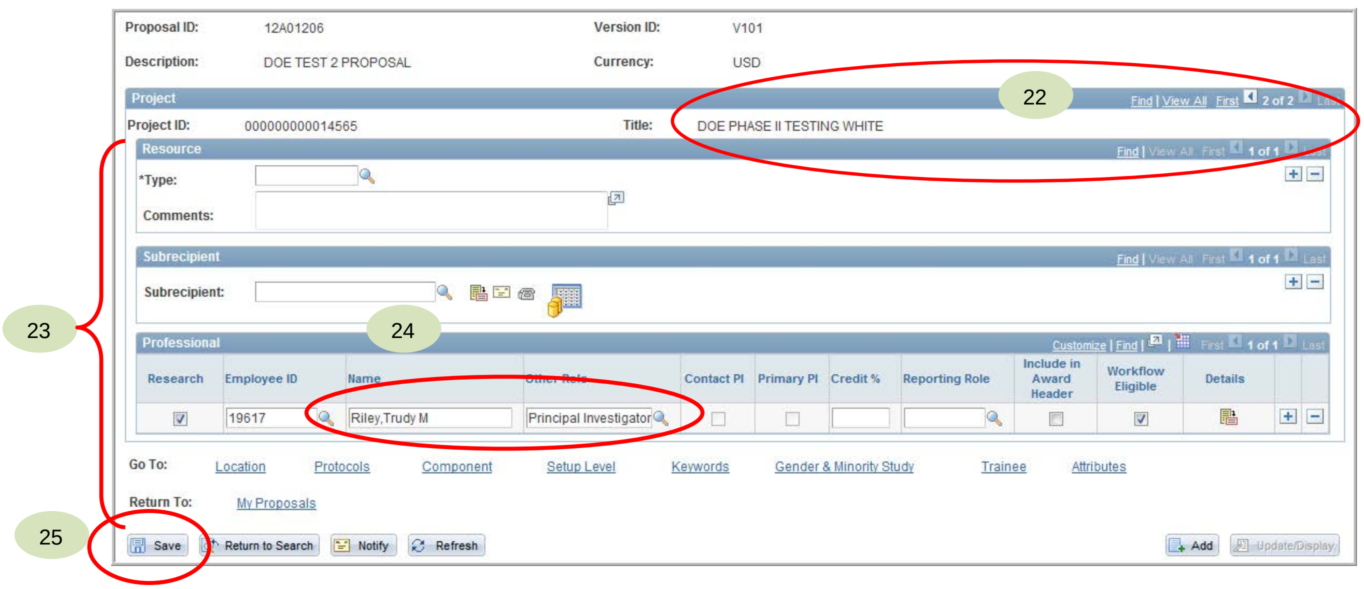
(The only exception is new hires, which have this data entered by the JED/New Hire webform.)

- 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 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.