

Pioneer eRA Proposal Submission guide

Sponsor type: Non-federal (Non grants.gov submissions ONLY)

Last Updated: 8/4/2020

Contents

Welcome	3
1 Login to Pioneer eRA	4
2 Create a new proposal development record	4
3 New proposal questionnaire	5
4 Setup questions screen	10
4.1 Proposal identifiers	10
4.2 Addressing all questions/sections	10
5 Approval forms & Internal pre-review routing	13
5.1 Entering Cost Sharing / F&A Waiver Form	13
5.2 Routing Cost Sharing / F&A Waiver Form for approval	14
5.3 Entering Budget & PRA Form	16
5.4 Routing Budget & PRA Form for approval	16
5.4.1 Uploads for signature	17
6 Budget	18
7 Personnel	18
8 Supplemental Documents	19
9 Acknowledge & Finalize the proposal	19
10 How to re-open your PD record	20
10.1 Quick find	20
10.2 Locate records by using filters	21

Welcome

This document is designed to help you, as a principal investigator, a department administrator, or a coordinator working on a submission on behalf of your PI, to find step-by-step information on proposal development using Pioneer eRA.

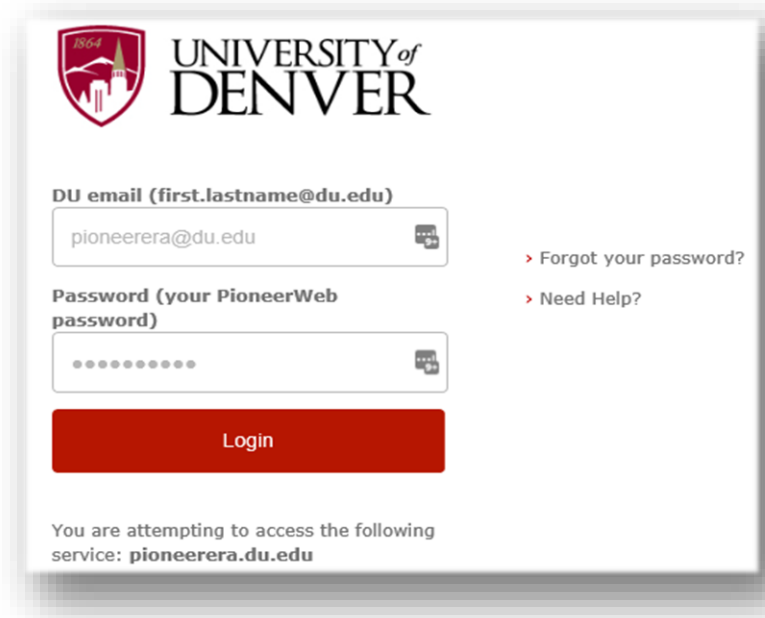
Please note that users must have a Pioneer eRA account to submit proposals. If you are not sure about your access to the system or if you wish to receive access, please contact your [system admin](#) with your first and last name, department name, 87 number and email address.

Important: All sponsored project proposals must be created in Pioneer eRA and routed for internal review and approval via Pioneer eRA.

1 Login to Pioneer eRA

Step 1: In your preferred internet browser, navigate to pioneerera.du.edu

Step 2: Enter your DU email address and Pioneer Web password. Click Login.

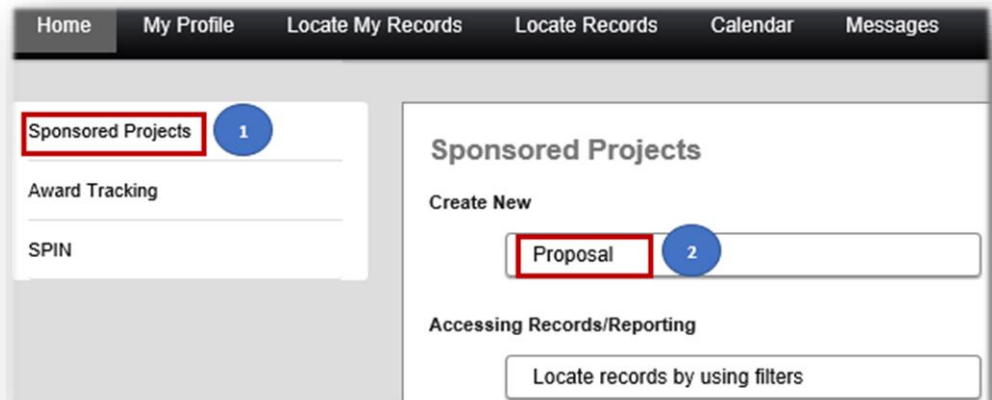


The screenshot shows the login page for the University of Denver Pioneer eRA system. At the top left is the University of Denver logo, featuring a shield with a building and the year 1864, next to the text "UNIVERSITY of DENVER". Below the logo are two input fields: "DU email (first.lastname@du.edu)" containing "pioneerera@du.edu" and "Password (your PioneerWeb password)" with masked characters. To the right of these fields are links for "> Forgot your password?" and "> Need Help?". A red "Login" button is positioned below the password field. At the bottom, a message states: "You are attempting to access the following service: pioneerera.du.edu".

2 Create a new proposal development record

Step 1: Click "Sponsored Projects" in the sidebar of your home page.

Step 2: Click "Create New-Proposal". Your new proposal setup page will open in a new window.



The screenshot shows the home page of the Pioneer eRA system. A navigation bar at the top includes links for "Home", "My Profile", "Locate My Records", "Locate Records", "Calendar", and "Messages". On the left sidebar, "Sponsored Projects" is highlighted with a red box and a blue circle containing the number "1". Below it are "Award Tracking" and "SPIN". The main content area is titled "Sponsored Projects" and features a "Create New" section with a "Proposal" button highlighted by a red box and a blue circle containing the number "2". Below this is an "Accessing Records/Reporting" section with a button labeled "Locate records by using filters".

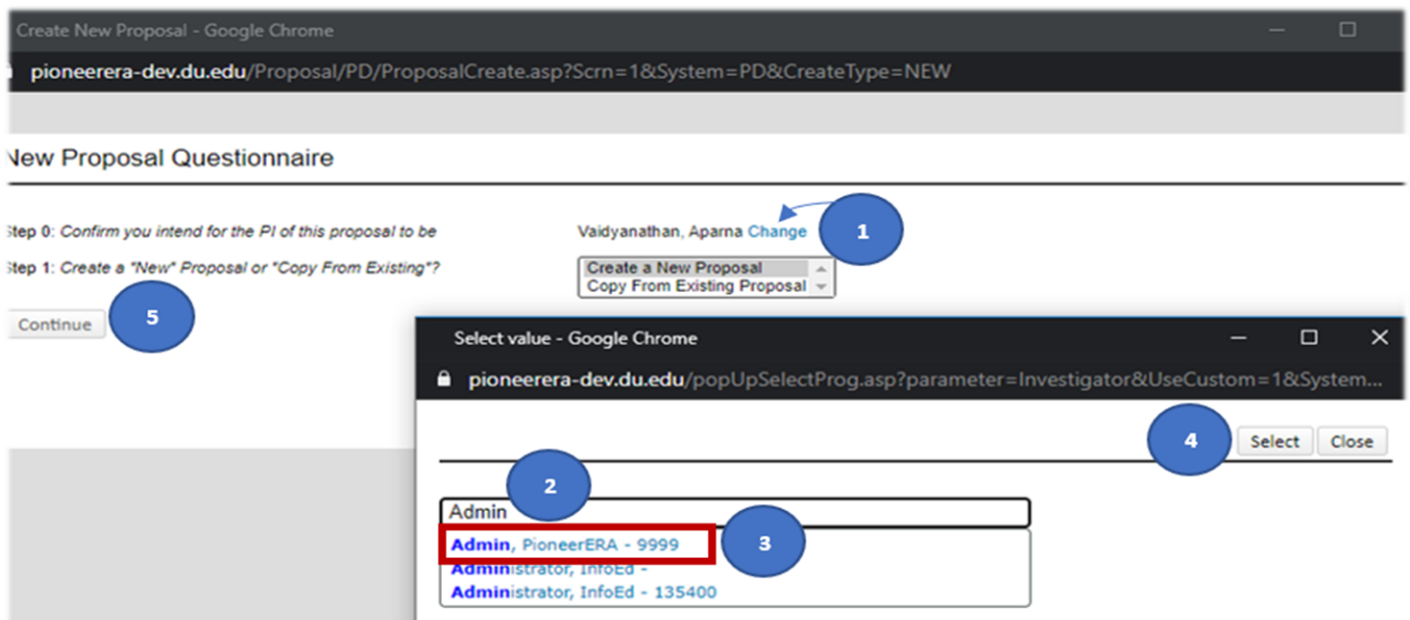
3 New proposal questionnaire

Proposal creation in PD module involves defining some basic information that includes PI name, Proposal type, Sponsor name, Proposal title, Start and End dates, and Number of Periods.

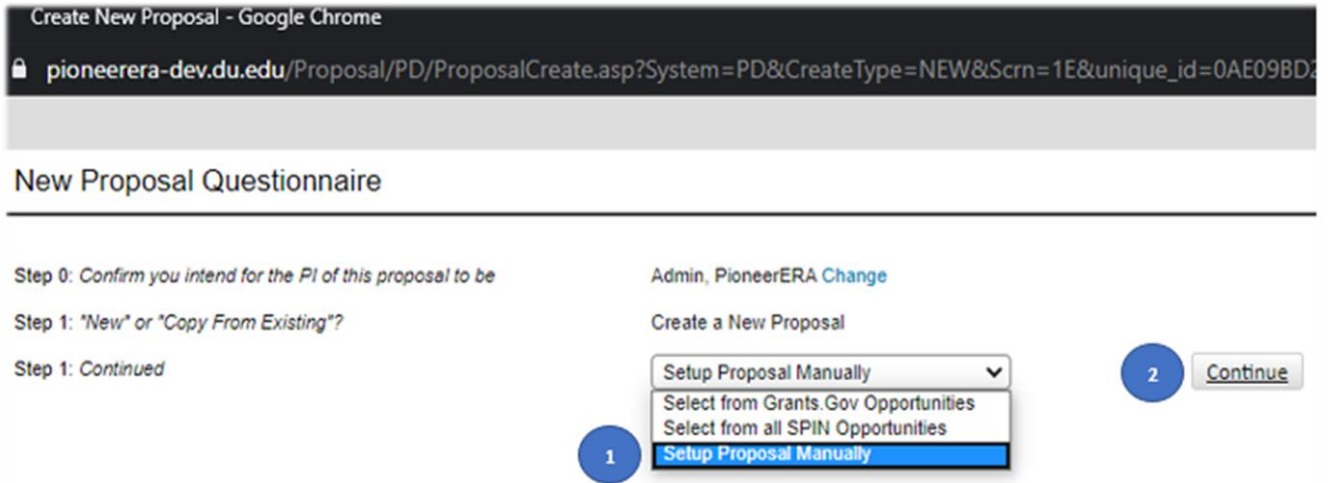
Important: Never close the browser when working on new proposal questionnaire. To ensure proper record creation, you should complete all seven steps and click "create proposal". Clicking on ✖ will cancel the proposal creation.

Step 0: Confirm PI: By default, the person creating the proposal is listed as the PI. To modify the PI, click "Change" and a new window will open with a search option. In the search box provided, begin typing PI's name in the format "Last name, First Name" (e.g. Smith, Jesse). Click the desired name from listing and click "Select." Do not click ✖.

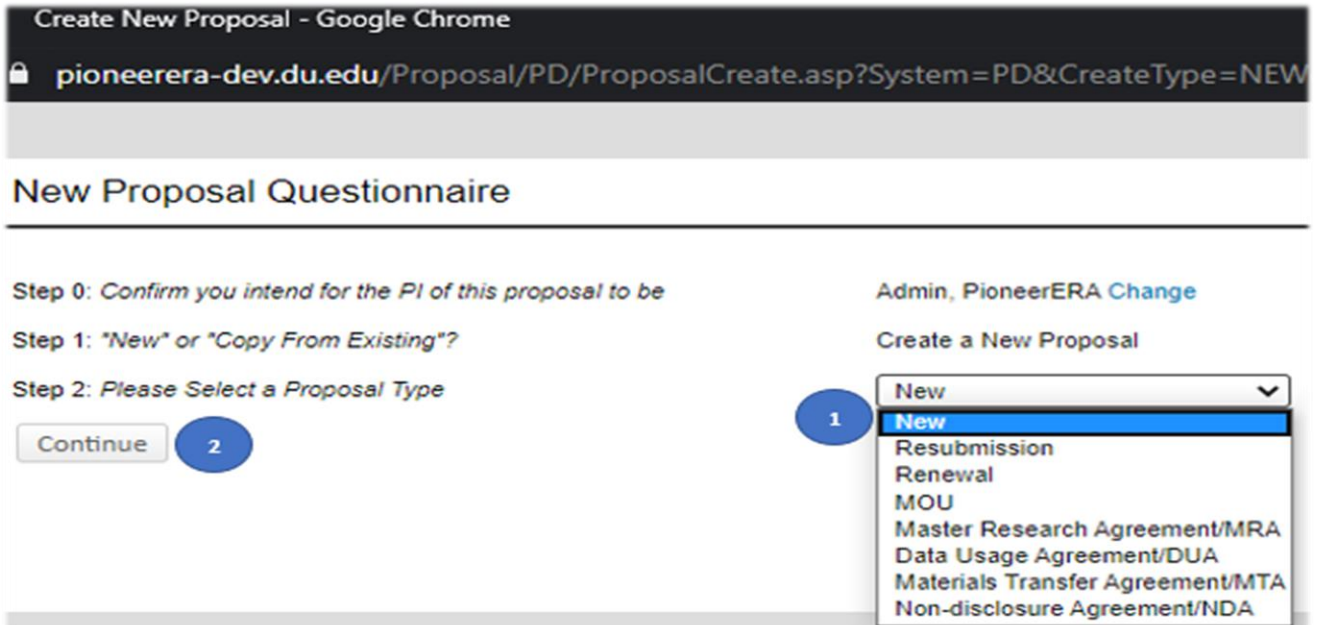
Step 1: a) Select "Create a New Proposal" and click "Continue." (A new proposal is a blank or empty proposal. If you choose to copy from an existing proposal, a previously created proposal is used as a template, if security permits. Some information from the existing proposal will be copied into the new proposal.) ORSP strongly suggests creating a new proposal.



Step 1: b) Choose "Setup Proposal Manually" from the dropdown and click "Continue." This is the recommended setup type for all non-federal proposals.



Step 2: Choose a proposal type from the dropdown and click "Continue."



Step 3: Type a sponsor name in the search box, click the desired sponsor from listing and click "Continue".

Create New Proposal - Google Chrome
pioneerera-dev.du.edu/Proposal/PD/ProposalCreate.asp?System=PD&CreateType=NEW&Scrn=3&unique_id=0A...

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be Admin, PioneerERA Change

Step 1: "New" or "Copy From Existing"? Create a New Proposal

Step 2: Proposal Type New

Step 3: Select a Sponsor

Continue

1 SPENC

Spencer Foundation

Note: If desired sponsor does not appear in results, [contact your research project administrator](#) to request that the sponsor be added to the database. In the meantime, you can choose "Default Sponsor" and continue entering your proposal. But, remember to correct the sponsor name later when the missing sponsor is added to the database.

Step 4: The system will automatically assign a proposal "tracking" number. Step 4 is skipped.

Step 5: In the free-text box provided, enter your proposal title and click "Continue."

Create New Proposal - Google Chrome
pioneerera-dev.du.edu/Proposal/PD/ProposalCreate.asp?System=PD&CreateType=NEW&unique_id=0AE09BD2-86DE-4E...

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be Admin, PioneerERA Change

Step 1: "New" or "Copy From Existing"? Create a New Proposal

Step 2: Proposal Type New

Step 3: Selected Sponsor Spencer Foundation

Step 4: "Tracking" Number or "Proposal" Number This proposal will be automatically numbered.

Step 5: Proposal's Title

Test Proposal

Continue

Step 6: Click the calendar icon to select project start and end dates or manually enter the dates in the format "DD-MON-YYYY". Click "Continue" to advance. (*The dates can be adjusted later, after the proposal is created, if necessary.*)

Create New Proposal - Google Chrome
pioneerera-dev.du.edu/Proposal/PD/ProposalCreate.asp?System=PD&CreateType=NEW&unique_id

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be Admin, PioneerERA Change

Step 1: "New" or "Copy From Existing"? Create a New Proposal

Step 2: Proposal Type New

Step 3: Selected Sponsor Spencer Foundation

Step 4: "Tracking" Number or "Proposal" Number This proposal will be automatically numbered.

Step 5: Proposal's Title Test Proposal

Step 6: What are the project start and end dates? From 01-Jul-2020 To 30-Jun-2021

Continue 3

Step 7: The system will automatically assign the number of budget periods based on the dates entered in Step 6. The assignment is based on a full calendar year. If necessary, you may adjust the number of periods in the pick list. When done, click "Continue" to advance.

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be Admin, PioneerERA Change

Step 1: "New" or "Copy From Existing"? Create a New Proposal

Step 2: Proposal Type New

Step 3: Selected Sponsor Spencer Foundation

Step 4: "Tracking" Number or "Proposal" Number This proposal will be automatically numbered.

Step 5: Proposal's Title Test Proposal

Step 6: Project Start and End Dates 01-Jul-2020 to 30-Jun-2021

Step 7: How many years and/or budget periods would you like? 1

1

*NOTE: If you need additional years/periods beyond 7, you may add them as needed once inside the proposal.

Continue

Next, review your responses to all the questions. If correct, click "Create Proposal." If incorrect, use the "Back" button to step back through responses and make corrections.

Note: Additional budget periods may be added later in the Budget section. You will still be able to modify some of the information you entered here, after proposal creation.

New Proposal Questionnaire

Back

Step 0: Confirm you intend for the PI of this proposal to be	Admin, PioneerERA Change
Step 1: "New" or "Copy From Existing"?	Create a New Proposal
Step 2: Proposal Type	New
Step 3: Selected Sponsor	Spencer Foundation
Step 4: "Tracking" Number or "Proposal" Number	This proposal will be automatically numbered.
Step 5: Proposal's Title	Test Proposal
Step 6: Project Start and End Dates	01-Jul-2020 to 30-Jun-2021
Step 7: Number of Budget Periods	1
Is all of the above information correct?	*NOTE: Clicking "Create Proposal" will create a new proposal with the properties you have indicated above. There is one final screen of questions to be completed before you can start entering your new proposal. Again, you will be able to change the properties of the proposal once it has been created if need be.

After you click 'Create Proposal', wait for the page to finish configuring all the steps. Once it is complete, your proposal record will be created and will automatically open in a new window. Your New Proposal Questionnaire will no longer be available after this point.

pioneerera-dev.du.edu/Proposal/PD/ProposalCreate.asp?System=PD&CreateType=NEW&unique_id=0AE09BD2-86DE-4E1A-9~245&NewType=UDENVER_P_PROP_TYPE_1...


New Proposal Questionnaire

Back

Step 0: Confirm you intend for the PI of this proposal to be	Admin, PioneerERA Change
Step 1: "New" or "Copy From Existing"?	Create a New Proposal
Step 2: Proposal Type	New
Step 3: Selected Sponsor	Spencer Foundation
Step 4: "Tracking" Number or "Proposal" Number	This proposal will be automatically numbered.
Step 5: Proposal's Title	Test Proposal
Step 6: Project Start and End Dates	01-Jul-2020 to 30-Jun-2021
Step 7: Number of Budget Periods	
Is all of the above information correct?	

Step 2 of 5: Configuring Record Specific Data Collection

Please do not navigate away from this page.



proposal with the properties you have indicated above. before you can start entering your new proposal. Again, once it has been created if need be.

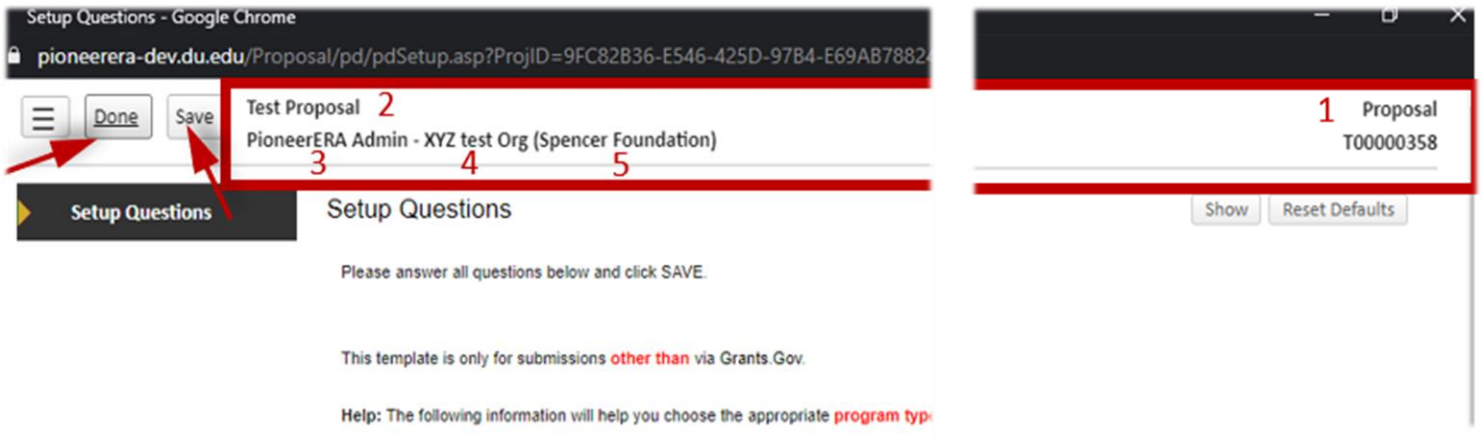
4 Setup questions screen

4.1 Proposal identifiers

After you click 'Create Proposal', the Setup questions page will appear. From this point, the proposal record will be available in the system for view/edit based on your permissions. You will be able to track the status of your proposal anytime by knowing the elements of your proposal.

The key elements can be found in the proposal header area: Proposal number/Pioneer eRA record "tracking" identifier (TXXXXXXXX in the upper right corner of the screen), Proposal title, PI name, PI's Primary Department, Sponsor Name.

Important: SAVE- Click 'Save' to save your progress before you advance to the next tab. **DONE**- Click 'Done' only when you want to exit out of the proposal record. Closing the record using ✖ does not mean that you have exited out of the proposal record. Always use 'Done' button to exit the record properly.



4.2 Addressing all questions/sections

Address all questions/areas of the Setup Questions to proceed in the proposal.

Step 1: Submission Mechanism/Form Information

If this project is a flow through project (a subcontract or subgrant), click the Yes radio button. In the Sponsor/Template Selection popup, you can change the Originating Sponsor. Otherwise, proceed to next section.

Submission Mechanism/Form Information

Is this a Flow Through Project? Yes No

Sponsor/Template Selection - Google Chrome
pioneerera-dev.du.edu/PDNET2/UI/SelectFundingOpp.aspx?ProjId=DB304A4B-8FB5-4162-8FF2-60AFDD8D0F7F&FlowThrough=1

Sponsor/Template Selection Save Close

Proposal Sponsor Robert Gallop [Change](#)

Originating Sponsor ABB Bomen Inc. [Change](#) [Remove](#)

Is this a Flow Through Project? Yes No

Step 2: Deadline Information

Click the Yes or No radio button to indicate if there is a deadline for the submission. If you answer No, this section will have no further questions. If you answer Yes, the following steps are required.

- 1) Select the Deadline Type from the dropdown.
- 2) Enter the Deadline Date in the available field or click the calendar icon and pick a date.
- 3) Enter the Deadline Time as 5:00:00 PM. By default, the deadline time zone is Mountain time.

Deadline Information

Is there a Deadline for this Submission? Yes No

Deadline Type

Deadline Date

Deadline Time

Step 3: General Proposal Properties

Indicate whether your proposal will involve the use of humans as part of the project. Proposals involving Human Subjects would require some additional protocols.

Indicate whether your proposal will involve the use of animals. Proposals involving laboratory animals would require some additional protocols.

Step 4: Budget Setup Information

This section drives the F&A scheme and the calculation in F&A tab of the budget screen. Please read the following and choose an appropriate **program type** and mark **on/off campus**.

Program Types:

ARC-Academic Research Center: Research and scholarship activities that include rigorous inquiry, experiment, or investigation to increase the scholarly understanding of the involved discipline.

OSA-Other Sponsored Agreements: Service and training activities that primarily benefit non-DU students/personnel. These include: i.) Community outreach projects, ii.) Curriculum development/evaluation for outside entities, iii.) Travel and Conference grants, iv.) Service, development or training that are generally work for hire.

SI-Sponsored Instruction: Teaching and training activities funded by external sponsors for the benefit of DU students/personnel. Includes agreements which support curriculum development as well as teaching/training activities whether offered toward a degree or certificate.

Off-Campus Rate: To be considered off-campus, 50% of more of the University employee personnel effort (included cost-shared effort) is performed in facilities neither owned nor leased by the University.

General Proposal Properties

Will your proposal involve the use of Human Subjects?

Yes No

Will your proposal involve the use of Laboratory Animals?

Yes No

Budget Setup Information

Select the Program Type

Research - ARC (US Governm

The majority of the research will be conducted

On Campus Off Campus

Step 5: After all the questions have been answered, there are two ways to save and complete this screen.

- 1) Click in the bottom right corner of the screen. This will save and validate all the questions and automatically make the screen completed. You will automatically advance to the next available tab (Cost Sharing Form).
- 2) Click in the upper left corner of the screen. The screen will auto-complete if all mandatory questions have been answered. You will automatically advance to the next available tab (Cost Sharing Form).

In the side navigation bar next to the Setup Questions, a white check mark implies that the screen has been completed. The screen will now be available in a "View Only" mode. This triggers all other tabs of the proposal to appear. Click on the desired tab to navigate further.

Important: As you finish answering the questions on each tab, indicate so by checking the "Completed" checkbox in the upper right corner of that screen. When all the tabs have been completed, you will be able to submit the final application of your proposal.

After the Setup Questions tab has been marked complete, changes may still be made. Select the Setup Questions tab in the side navigation bar. Deselect the Completed checkbox. The screen will refresh and will be available to edit. However, uncompleting the Setup Questions tab will uncomplete all other tabs that were previously completed.

Setup Questions - Google Chrome
pioneerera-dev.du.edu/Proposal/pd/Setup.asp?ProjID=9FC82836-E546-425D-9784-E69AB7882476

Test Proposal
PioneerERA Admin - XYZ test Org (Spencer Foundation)

Proposal T00000358

Setup Questions Completed

This template is only for submissions **other than** via Grants Gov.

Help: The following information will help you choose the appropriate **program type** and **on/off campus** in the Budget setup information section.

Program Types:
1 **ARC-Academic Research Center:** Research and scholarship activities that include rigorous inquiry, experiment, or investigation to increase the scholarly understanding of the involved discipline.
2 **QA-Other Sponsored Agreements:** Service and training activities that primarily benefit non-DU students/personnel. These include: i) Community outreach projects, ii) Curriculum development/evaluation for outside entities, iii) Travel and Conference grants, iv) Service, development or training that are generally work for hire.
3 **SI-Sponsored Instruction:** Teaching and training activities funded by external sponsors for the benefit of DU students/personnel. Includes agreements which support curriculum development as well as teaching/training activities whether offered toward a degree or certificate.

Off-Campus Rate: To be considered off-campus. 50% of more of the University employee personnel effort (included cost-shared effort) is performed in facilities neither owned nor leased by the University.

Submission Mechanism/Form Information

Is this a Flow Through Project? No

Deadline Information

Is there a Deadline for this Submission? No

General Proposal Properties

Will your proposal involve the use of Human Subjects? No

Will your proposal involve the use of Laboratory Animals? No

Budget Setup Information

Select the Program Type Research - ARC (US Government/Non-Profit)

The majority of the research will be conducted On Campus

5 Approval forms & Internal pre-review routing

5.1 Entering Cost Sharing / F&A Waiver Form

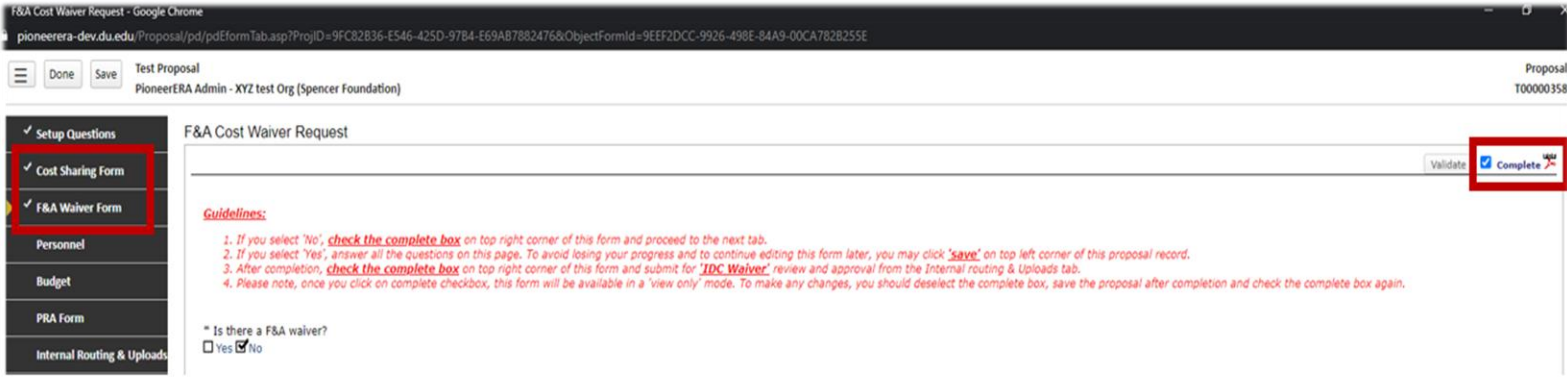
Step 1: Click on "Cost Sharing Form" from the left navigation menu.

Step 2: Address all questions and fields on the form. When done, click the "Complete" checkbox in the upper right corner. (Use Validate button to verify if you have completed all mandatory questions before you click "Complete" box.)

Step 3: Click on "F&A Waiver Form" and repeat the above steps.

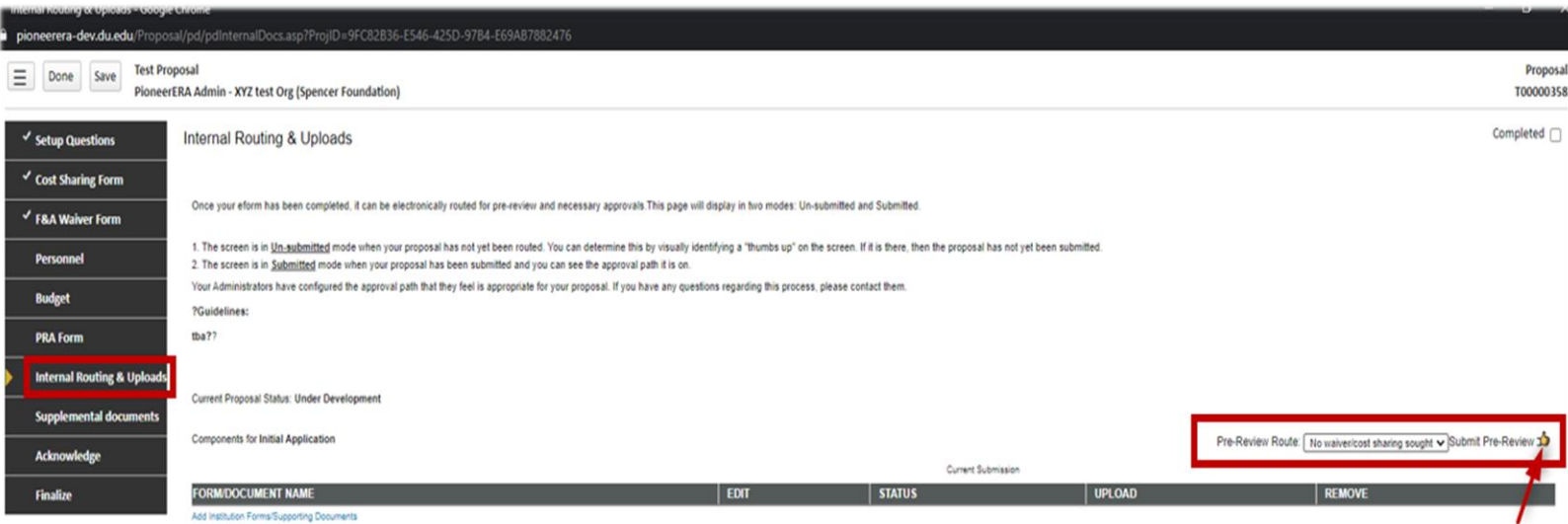
Step 4: Make sure you see tick marks on both Cost Sharing and F&A Waiver tabs.

Step 5: Click on 'Internal Routing & Uploads' tab



5.2 Routing Cost Sharing / F&A Waiver Form for approval

Step 1: Locate 'thumbs up' icon. Locate the Pre-review route dropdown with a route name.



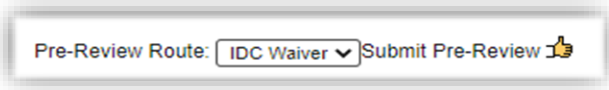
Depending on what you answered to "Is there a cost share?" and "Is there a F&A waiver?" on the forms, a Pre-Review route will automatically show up on this screen.

<i>Is there a cost share?</i>	<i>Is there a F&A Waiver?</i>	<i>Pre-Review route name</i>
No	No	<i>No waiver/cost sharing sought</i>
Yes	No	<i>Cost Share</i>
No	Yes	<i>IDC Waiver</i>

Note: No waiver/cost sharing is a notification step only, no approval is required. You still need to submit it by clicking thumbs-up to advance to 'PRA and Budget Route'.

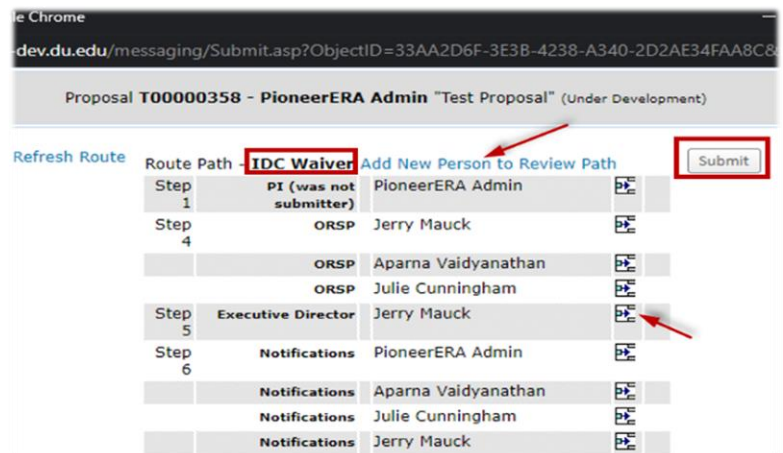
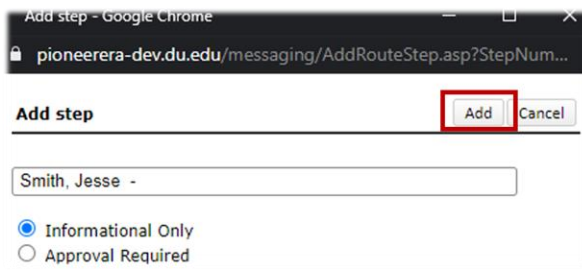
A Cost share or a F&A waiver route requires approval from multiple parties who have been assigned as your department's designated approvers. Once this route is complete, you will be able to submit for a 'PRA and Budget' pre-review.

Step 2: Click on thumbs-up. Route/approval path will open in a new window.



Step 3: Review your route path.

Step 4: If you wish to add more people to review path, click on insert button or "Add new person" link to add a person as an approver or as FYI only.



Step 5: Finally, click on "Submit" button.

Routing steps are sequential and automatic. All designated approvers listed on this screen will be notified with a link to approval page via email (Please click this link-> [Routing & Approval document](#) for more information on approvals.)

At any point of time, you may check who is reviewing/notified, approver's decision and comments under "Active Routing Progress". You may also continue working on other tabs until you are notified. PI & department admin will be notified via email with any next steps after the completion of an active routing.

Current Proposal Status: Initial review

Components for Initial Application

Current Submission

FORM/DOCUMENT NAME	EDIT	STATUS	UPLOAD	REMOVE
Add Institution Forms/Supporting Documents				

Active Routing Progress Open Full

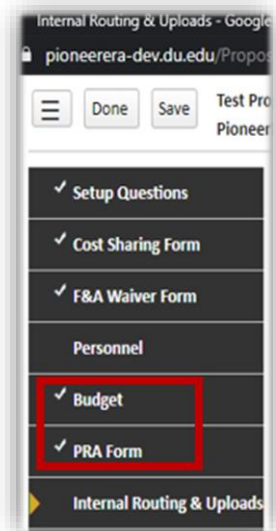
T00000358 - PioneerERA Admin Test Proposal

Submitted by Aparna Vaidyanathan on behalf of PioneerERA Admin

Route Name	Route Type	Step Number/Name	Who	Decision	Insert	Remove
IDC Waiver	Pre-Review	Step 1 - PI (was not submitter)	PioneerERA Admin	Notified		
IDC Waiver	Pre-Review	Step 4 - ORSP	Julie Cunningham	13-Jul-2020 5:37:47 PM		
IDC Waiver	Pre-Review		Jerry Mauick			
IDC Waiver	Pre-Review		Aparna Vaidyanathan			
IDC Waiver	Pre-Review	Step 5 - Executive Director	Jerry Mauick			
IDC Waiver	Pre-Review	Step 6 - Inserted Step	Jesse Smith			
IDC Waiver	Pre-Review	Step 6 - Notifications	Aparna Vaidyanathan			
IDC Waiver	Pre-Review		PioneerERA Admin			
IDC Waiver	Pre-Review		Julie Cunningham			

5.3 Entering Budget & PRA Form

- Step 1:** Complete the detailed budget (Refer [Section 6](#) for steps).
- Step 2:** Click on "PRA Form" from the left navigation menu.
- Step 3:** Address all questions and fields on the form. When done, check the "Complete" box in the upper right corner of the screen. (Use Validate button to verify if you have completed all mandatory questions before you check the "Complete" box.)
- Step 4:** Make sure you see tick marks on both budget and PRA form tabs.
- Step 5:** Click on 'Internal Routing & Uploads' tab



5.4 Routing Budget & PRA Form for approval

- Step 1:** You may review the Current Proposal Status. The following screenshot shows 'Waiver or Cost share approved'. This status will vary based on the previous route you submitted.
- Step 2:** You may review the route history of all previously submitted routes for this proposal.
- Step 3:** Add any forms or documents that requires a signature from ORSP. Any documents uploaded on this page will be routed as part of 'Budget and PRA Review'.

Current Proposal Status: Waiver also Cost Share approved 4

Components for Initial Application Pre-Review Route: Budget and PRA Review Submit Pre-Review

FORM/DOCUMENT NAME	EDIT	STATUS	UPLOAD	REMOVE
Add Institution Forms/Supporting Documents 3				
2 Route History				
Route Submitted - (by Aparna Vaidyanathan on behalf of PioneerERA Admin at 13-Jul-2020 5:37:45 PM)				
IDC Waiver - Pre-Review Hide Comments				
Step Number	Step Name	Who	Notified	Decision
Step 1	PI (was not submitter)	PioneerERA Admin	13-Jul-2020 5:37:47 PM	Bypassed
Comments: Aparna Vaidyanathan (7/13/2020 6:28:27 PM) - "Aparna Vaidyanathan bypassed this routing step on 13-Jul-2020 6:28:27 PM Approved"				
Step 4	ORSP	Aparna Vaidyanathan	13-Jul-2020 6:28:30 PM	Approved - Approve
Comments: Aparna Vaidyanathan (7/13/2020 6:29:48 PM) - "Reviewed and approved"				
Step 4	ORSP	Julie Cunningham	13-Jul-2020 6:28:30 PM	Bypassed
Comments: Aparna Vaidyanathan (7/13/2020 6:33:00 PM) - "Aparna Vaidyanathan bypassed this routing step on 13-Jul-2020 6:33:01 PM"				

5.4.1 Uploads for signature

- 1) Locate the "Add Institution Forms/Supporting Documents" link at the bottom of the screen. Click the link to open the upload screen.
- 2) On the upload screen, enter the document name, select the file, select document type from the Document pick list, select "Proposal Documents" from the Folder pick list, and click "Upload."
- 3) Repeat step two above to upload further proposal materials.
- 4) When done uploading proposal materials, click "Close."

Step 4: When you return to the Internal Routing and Uploads screen, locate Pre-review route dropdown displaying 'Budget and PRA Review'. Locate and click on 'thumbs up' icon on this screen. Route path will open in a new window.

Step 5: Review your route path.

Step 6: If you wish to add more people to review path, click on insert button or "Add new person" link to add a person as an approver or as FYI only.

Step 7: Finally, click on "Submit" button.

Routing steps are sequential and automatic. All designated approvers listed on this screen will be notified with a link to approval page via email (*Please click this link-> [Routing & Approval](#) document for more information on approvals.*)

Step 8: At any point of time, you may check who is reviewing/notified, approver's decision and comments under "Active Routing Progress". You may also continue working on other tabs until you are notified.

Step 9: After Budget and PRA approval, your Internal Routing and Uploads tab will look like below. Current Proposal Status should now display "Budget approved". You can view the route history by expanding the + button. There will be no thumbs up button, (i.e., there are no other pre-review routes for you to submit.)

Step 10: Click the "Completed" box in the upper right corner.

Current Proposal Status: Budget approved

Components for Initial Application

Current Submission

FORM/DOCUMENT NAME

EDIT

STATUS

UPLOAD

REMOVE

Add Institution Forms/Supporting Documents

Route History

Route Submitted - (by Aparna Vaidyanathan on behalf of PioneerERA Admin at 13-Jul-2020 5:37:45 PM)
IDC Waiver - Pre-Review

Route Submitted - (by Aparna Vaidyanathan on behalf of PioneerERA Admin at 15-Jul-2020 2:43:14 PM)
Budget and PRA Review - Pre-Review

[Hide Comments](#)

[Hide Comments](#)

6 Budget

- Step 1:** Click on "Budget" from the left navigation menu. A new pop-up window will open.
- Step 2:** Locate "Personnel costs, "Non-Personnel costs", F&A, Cost Share sections of the screen for each budget period and enter your detailed budget.
- Step 3:** Click "Save" in the upper left corner of the screen.
- Step 4:** Click "Complete Budget" in the upper right corner of the screen
- Step 5:** Click "Done" in the upper left corner of the screen to exit out of the Budget window. This will automatically add a "completed" checkmark on budget tab.

For detailed information, please refer to the [Budgeting](#) documentation.

7 Personnel

- Step 1:** The key PI will be automatically listed on this screen upon proposal creation.
- Step 2:** All key Personnel including the subaward PI (if any) added under Personnel costs in Budget section will automatically be listed in this screen.
- Step 3:** You may add additional non-key personnel or consultants.
- Step 4:** Start typing last name in the "Name" field and click on the desired individual from the listing.
- Step 5:** Select the individual's role from the "Role" pick list and click "Save."
- Step 6:** Repeat this process until all personnel have been added.
- Step 7:** When done, check the "Completed" box in upper right corner of the screen.

For detailed information, please refer to the [Personnel](#) documentation.

8 Supplemental Documents

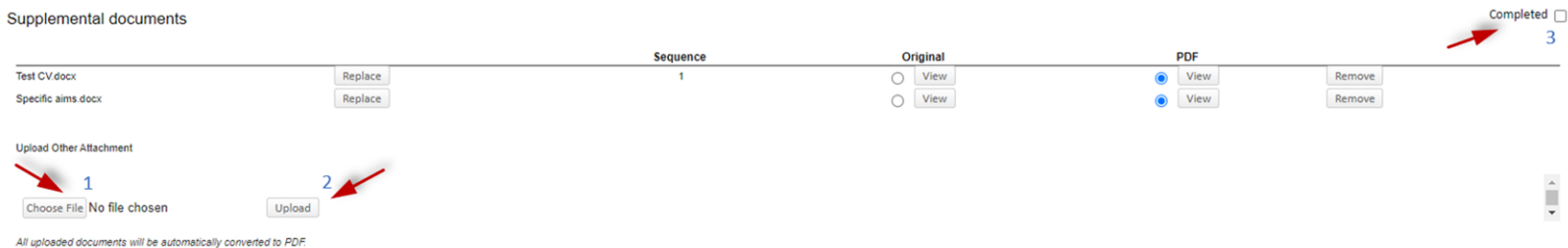
This section is optional. You may add any additional documents for record keeping purposes. Otherwise directly go to step 4.

Step 1: Click on "Supplemental Documents" from the left navigation menu

Step 2: Click "Choose File", select the file its location, click "Upload".

Step 3: Repeat the above to upload all materials.

Step 4: When done, click the "Completed" checkbox in the upper right corner.



9 Acknowledge & Finalize the proposal

Step 1: Click on "Acknowledge" tab from the left navigation menu.

Step 2: Select one of the options in the form and click the "Completed" checkbox in the upper right corner.

I acknowledge :

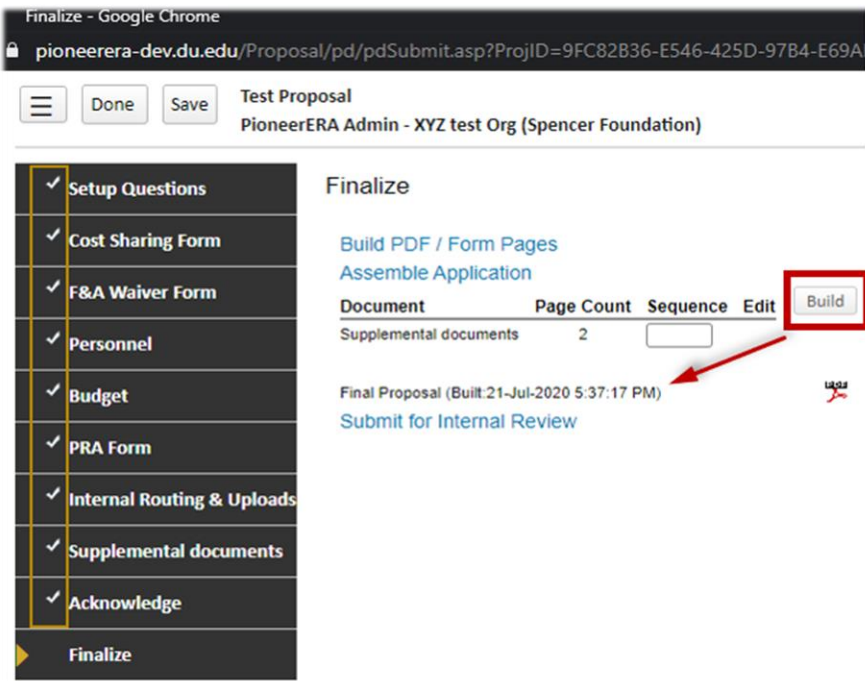
I will submit this proposal to the sponsor

I'm requesting ORSP's assistance

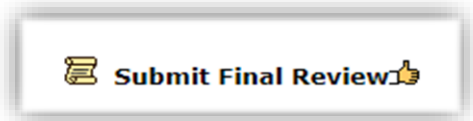
Step 3: Verify if all tabs have been completed. You can confirm that if tick marks are present on all tabs. Now, click on "Finalize" tab from the left navigation menu.

Step 4: Click "Build" to convert the Supplemental documents (if uploaded) to a single PDF. This step is not required if there are no uploaded documents.

Step 5: Click "Submit for Internal Review".



Step 6: Click on the "thumbs up" icon to the right of "Submit Final Review."



Step 7: Click "Submit" in the pop-up window.

After you receive a final approval notification from ORSP, the current status of your proposal record will automatically be changed to 'Ready to submit'. At this point, you may externally submit your proposal to the sponsor or you may seek ORSP's assistance to submit to the sponsor.

10 How to re-open your PD record

There are multiple ways to reopen your proposal record from the home page.

10.1 Quick find

In the quick find search bar, you may do one of the following:

- 1) Type in your proposal record number (TXXXXXXX) and click enter to locate the proposal.
- 2) Type the sponsor name of your proposal and click enter. Depending on the number of proposals (you have access to) associated with the sponsor name you searched for, the search results will vary from one to many records. You may then click on the desired proposal number from the listing.

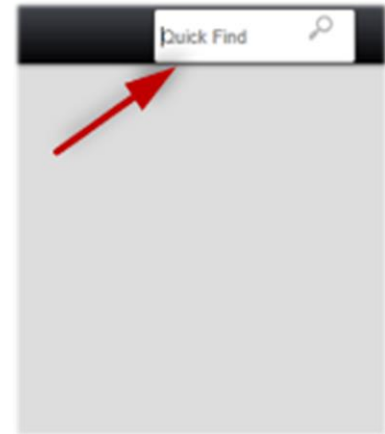
- Type PI's Last name and click enter. Depending on the number of proposals (you have access to) associated with the PI name you searched for, the search results will vary from one to many records. You may then click on the desired proposal number from the listing.

Records Locate Records Calendar Messages Things to Do

Results found: 1 [Export to Excel](#)

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Record Number	Record Owner	Record Primary Sponsor	Record Status
<input checked="" type="checkbox"/>	T00000358	Admin, PioneerERA	Spencer Foundation	Submitted to sponsor



10.2 Locate records by using filters

- Step 1:** Click on Sponsored Projects and click "Locate records by using filters".
- Step 2:** Add any number of filters to your search criteria from the "available fields to search by" listing. Type in a value or select a value from the listing for the selected fields to filter.
- Step 3:** Click on "Search".

Home My Profile Locate My Records Locate Records Calendar Messages Things to Do

Sponsored Projects

Award Tracking

Financial Tracking

SPIN

Create New

Proposal

Accessing Records

Locate record

Select 'Locate' Criteria

Modules available for searching across:

Account Award Sponsored Project

Available fields to search by

Record Associated Departments

Record Classification Codes

Record Creation Date

Record Key Words

Record Number

Record Owner

Record Owner Primary Department

Record Personnel

Record Personnel Department

Record Primary Department

Record Primary Sponsor

Record Primary Sponsor Type

Record Status

Record Title

Status Code Grouping

Banner Grant #

COI Results

Deadline

IACUC Results

IBC Results

IRB Results

Originating Sponsor

Proposal Type

Selected fields

Record Number
C T00000358

Record Owner
= Admin, PioneerERA - X

Record Primary Sponsor
= Spencer Foundation

Record Title
C Test Proposal

Search

Once you have located the proposal record, click on the proposal number and click Proposal Development. You may choose to Edit or View based on your access.

The screenshot shows a web application interface with a navigation bar at the top containing: Home, My Profile, Locate My Records, **Locate Records**, Calendar, Messages, and Things to Do. On the left side, there is a sidebar with menu items: Sponsored Projects, Award Tracking, Financial Tracking, and SPIN. The main content area displays a table of results. At the top of the table, it says "Results found: 1" and has an "Export to Excel" button. Below this is a header for grouping: "Drag a column header and drop it here to group by that column". The table has columns: Record Number, Proposal Type, Record Owner, Record Primary Sponsor, and Record Status. The first row contains: T00000358, Proposal Development, Edit, Spencer Foundation, and Submitted to sponsor. A context menu is open over the "T00000358" cell, listing options: Proposal Development, Proposal Tracking, Overview Info, Forward, Delete, and Bookmark Record. There are also "Edit" and "View" buttons visible in the table row.

Record Number	Proposal Type	Record Owner	Record Primary Sponsor	Record Status
T00000358	Proposal Development	Edit	Spencer Foundation	Submitted to sponsor