

**GM 2.0 CREATE PROPOSAL**

**PEOPLESOFT 8.4**

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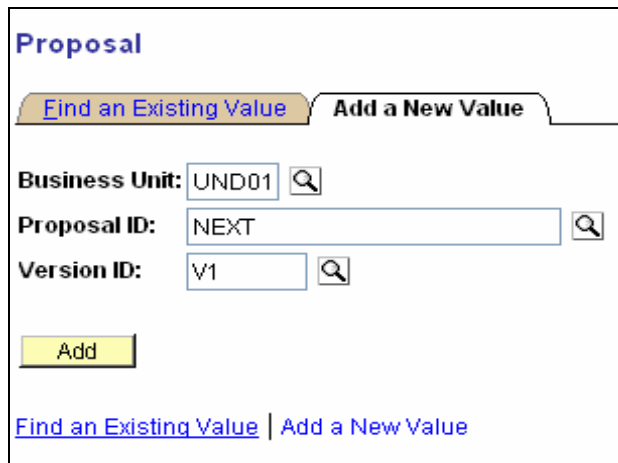
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## GM 2.1 Create Proposal with Express Budget

1. From the menu, select **Grants > Proposals > Proposal > Add a New Value**



**Proposal**

[Find an Existing Value](#) **Add a New Value**

**Business Unit:**

**Proposal ID:**

**Version ID:**

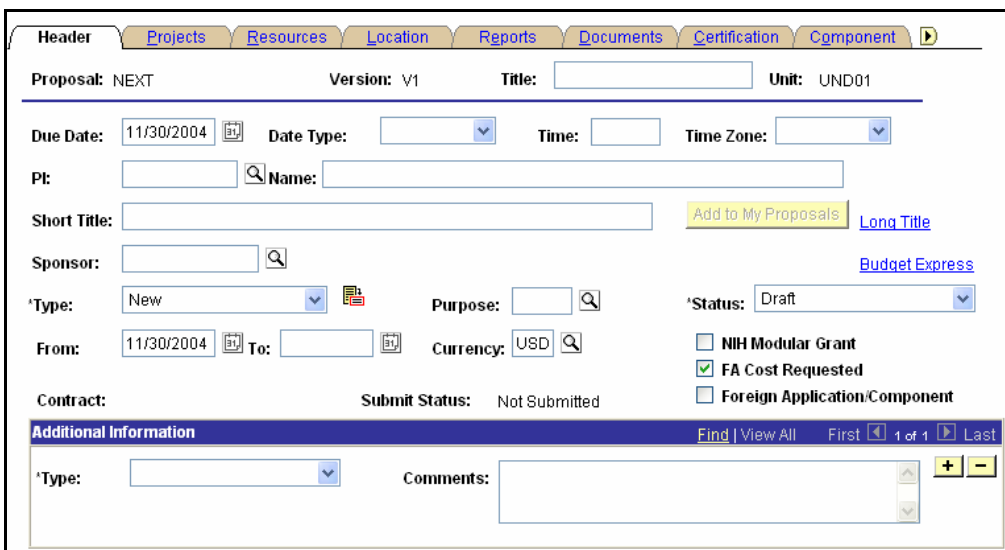
[Find an Existing Value](#) | [Add a New Value](#)

2. The **Business Unit** field will be the one established for your institution, “[NDSU1](#), [UND01](#), etc.”  
The **Proposal ID** field defaults to the value **NEXT**. **DO NOT CHANGE THIS VALUE**. The auto number system will populate this value when the proposal is saved correctly.  
The **Version ID** field defaults to **V1**. This value is correct. Do not adjust.

3. Click on the **ADD** button

## Header Page

The Proposal Header Page establishes proposal-specific details. The page shown below will appear after you click the **ADD** button.



Header **Projects** **Resources** **Location** **Reports** **Documents** **Certification** **Component**

Proposal: NEXT      Version: V1      Title:       Unit: UND01

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Due Date:        Date Type:        Time:       Time Zone:

PI:        Name:

Short Title:             [Long Title](#)

Sponsor:        [Budget Express](#)

Type:        Purpose:        Status:

From:        To:        Currency:

Contract:      Submit Status: Not Submitted

NIH Modular Grant  
 FA Cost Requested  
 Foreign Application/Component

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

Type:        Comments:

4. The **Due Date** will default to the current system date. If the submission has an agency defined due date, enter this date in the Due Date field.
5. Click on the magnifying glass next to **PI**. Select the desired PI. The PI name will populate the Name field when you save the proposal.
6. Enter the **Short Title**. This field is limited to 56 characters. The first 30 characters will default as the title of the Primary Project. If you have a title with more than 56 characters, click the [Long Title](#) link. This will display a screen with a title field. This title field has 256 characters available. Complete this field with the long title. Click ok and you are returned to the Proposal Header page. Enter the Short Title by entering 56 characters in the field. Short Title is a required field to successfully save the proposal.


*The project title defaults to the proposal title for all primary projects create with no short titles. When you navigate to the Project page, both the short and long titles are already populated with data. If you change the short title or the long title it must be changed in the title field on the header tab and the project tab.*

7. Click on the magnifying glass next to **Sponsor**. Select the desired sponsor. The [Sponsor ID](#) will populate the **Sponsor** field and the name will display.
8. The **Type** will be [New](#) for all proposals that are new. Review your business procedures to know how to designate proposals that are not new.
9. Select the desired purpose in the **Purpose** field. Below is a list of the purpose values available for this field. Clicking on the magnifying glass by the Purpose field accesses this selection page.


Purpose	Description
EPSCR	EPSCOR
INSTR	Instruction
OTHER	Other Sponsored/Public Service
PLTIM	Plant Improvements
RES	Research
SFA	Student Financial Aid
STDNT	Student Services
TRNG	Training

10. The **Status** field is always left [Draft](#) when you are first entering a proposal. Normally this field will be updated as the proposal is processed through the system.
11. Select the **To** and **From** date fields for the proposal.

*The system automatically creates the budget header with the same dates. If you need to change the dates on the proposal header after you exit the date fields, update the budget header date range first, so the dates remain synchronized. If you make a mistake, continue entering information, and then change the budget header before returning to the proposal header to make the correction.*

14. The additional information type will be used to indicate flow through funding. Once flow through has been selected an additional information icon will appear . Click on this icon to indicate primary sponsor, the sponsor name will appear to the right.

**Flow Through**

Primary Sponsor:   Name:

15. Click on the blue hyperlink called Budget Express. [Budget Express](#).

**Budget Express**

Direct - Personnel Cost:

Direct - Non Personnel Cost:

Total FA Budget:

Total Budget:

Effort Percentage:

16. Enter budget direct costs and F&A costs. Once complete, click the OK. The total budget will automatically calculate.

*NDUS will not use the effort percentage on the budget express.*

## Projects Page

17. Select the Projects tab

<a href="#">Header</a>	<b>Projects</b>	<a href="#">Resources</a>	<a href="#">Location</a>	<a href="#">Reports</a>	<a href="#">Documents</a>	<a href="#">Certification</a>	<a href="#">Component</a>	
<b>Proposal:</b>	WSC0000001	<b>PI:</b>	Dumb,PS			<b>Unit:</b>	WSC01	
<b>Version:</b>	V1	LL Test 2/10/2004						
<b>Proposal Projects</b> <span style="float:right">Find   View All   First 1 of 1 Last</span>								
<b>Proposal Project:</b>	WSC0000001	<input checked="" type="checkbox"/>	<b>Primary</b>	<b>Project:</b>	WSC0000001			
<b>Short Title:</b>	LL Test 2/10/2004	<a href="#">Long Title</a>						
<b>Department:</b>	3220		Computer Center					
<b>Institution ID:</b>	WSC01		WILLISTON					
<b>Dept Contact:</b>								
<b>Dept Rep:</b>	1		Dumb,PS					
<b>Subdivision:</b>	2410		Para Education					
<b>Department Cost Share</b> <span style="float:right">Find   View All   First 1 of 1 Last</span>								
<b>*Department:</b>	3200		Business Office			<b>Total %:</b>	100.00	
<b>Cost Share %:</b>	100.00	<b>Location:</b>		<a href="#">Cost Share Comment Detail</a>				

**The Proposal Project ID will default as Next\_1.**

18. Select **Primary**. This identifies the primary project in the proposal.

19. The **Short Title** will automatically be populated with the short title from the header page.

20. Enter the **Department**.

*The Department Cost Share Department is populated automatically when this department is entered. The Cost Share Department is really the F&A Offset department and will be different than the project department. A DR has been created to auto-populate the Cost Share Department with a fixed value.*

21. Enter the **Institution ID**. (Your Business Unit).

22. The Dept Contact and Dept Rep are [optional](#).

23. Enter the **Subdivision**. This value will [always](#) be [the same as the Department ID](#).

## Resources Page

24. Select the Resources tab.

The screenshot shows the 'Resources' tab selected in a web application. The top navigation bar includes tabs for Header, Projects, Resources, Location, Reports, Documents, Certification, and Component. Below the navigation, proposal details are displayed: Proposal: WSC0000001, PI: Dumb, PS, Version: V1, LL Test 2/10/2004, and Unit: WSC01. The 'Proposal Project' section shows Project: WSC0000001, LL Test 2/10/2004. The 'Resources' section has a table with one row: Res Nbr 1, \*Type: [empty], Comments: [empty]. The 'Subrecipients' section has fields for Seq Nbr: 1, ID: [empty], and Name: [empty]. The 'Professionals' section has a table with one row: Seq Nbr 10, ID 0050307, Name Farbo, Megan Grace, Role Other. The 'Edit Details' button is visible next to the professional entry.

25. In the Professionals section add all of the individuals that will be working on the grant when it is awarded whether they are paid or cost shared.

26. Click on the **Edit Details** button to add additional information for each employee if needed.

The 'Proposal Professional Details' dialog box is shown. It contains the following fields and options: ID: 0050307, Farbo, Megan Grace; Job Code: 840001; Project Role: [empty]; \*Role: Other; Organization: [empty]. There are four checkboxes: Eligible PI, First Time PI, PI Eligibility Waiver, and New Personnel. A grid of buttons allows adding information: Address, Experience, Honor/Award, Pending Support, Education, Advisor/Advisee, Collaboration, Ongoing Support, Job, Membership/Association, Publication, and Completed Support. The 'Additional Information' section has a dropdown for 'Comments' and a text area. Buttons for OK, Cancel, and Refresh are at the bottom.

## Location Page

27. Click on the Locations tab.

Header: Projects Resources **Location** Reports Documents Certification Component

Proposal: WSC0000001 PI: Dumb,PS  
 Version: V1 LL Test 2/10/2004 Unit: WSC01

Proposal Projects Find | View All First 1 of 1 Last

Project: WSC0000001 LL Test 2/10/2004

Proposal Project Locations Find | View All First 1 of 1 Last

\*Location:  Description:   Foreign

Country:  United States Phone:

Address 1:  Ext:

Address 2:  Fax:

Address 3:

City:

County:  Postal:

State:  North Dakota

28. At this time the **Location** will be the [building where the work is to take place](#).

29. Click on the **Save** button.

## Documents Page

30. Click on the Documents tab.

Header: Projects Resources Location Reports **Documents** Certification Component

Proposal: WSC0000001 PI: Dumb,PS  
 Version: V1 LL Test 2/10/2004 Unit: WSC01

Proposal Projects Find | View All First 1 of 1 Last

Project: WSC0000001 LL Test 2/10/2004

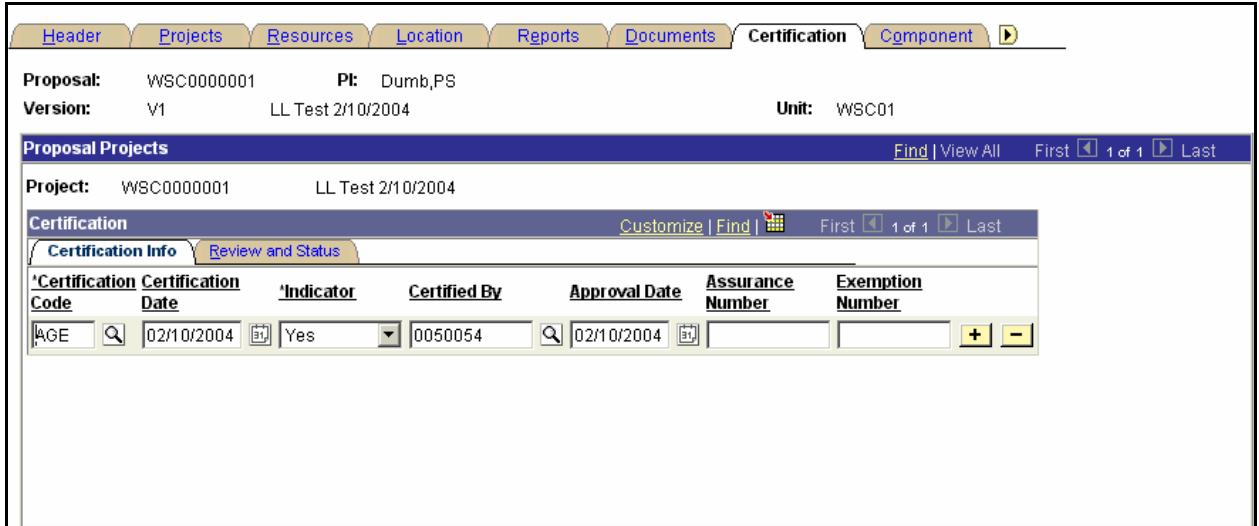
Document Attachments Customize | Find First 1 of 1 Last

Requests	Attached File
1	

*Additional documentation can be added on this page. Ex: Technical specs for the proposal can be attached. Currently we are experiencing problems while attempting to add documents. We hope to have this issue resolved by Go Live.*

## Certification Page

31. Click on the Certifications tab.



Header | Projects | Resources | Location | Reports | Documents | **Certification** | Component

Proposal: WSC0000001 PI: Dumb,PS  
Version: V1 LL Test 2/10/2004 Unit: WSC01

Proposal Projects Find | View All First 1 of 1 Last

Project: WSC0000001 LL Test 2/10/2004

Certification Customize | Find First 1 of 1 Last

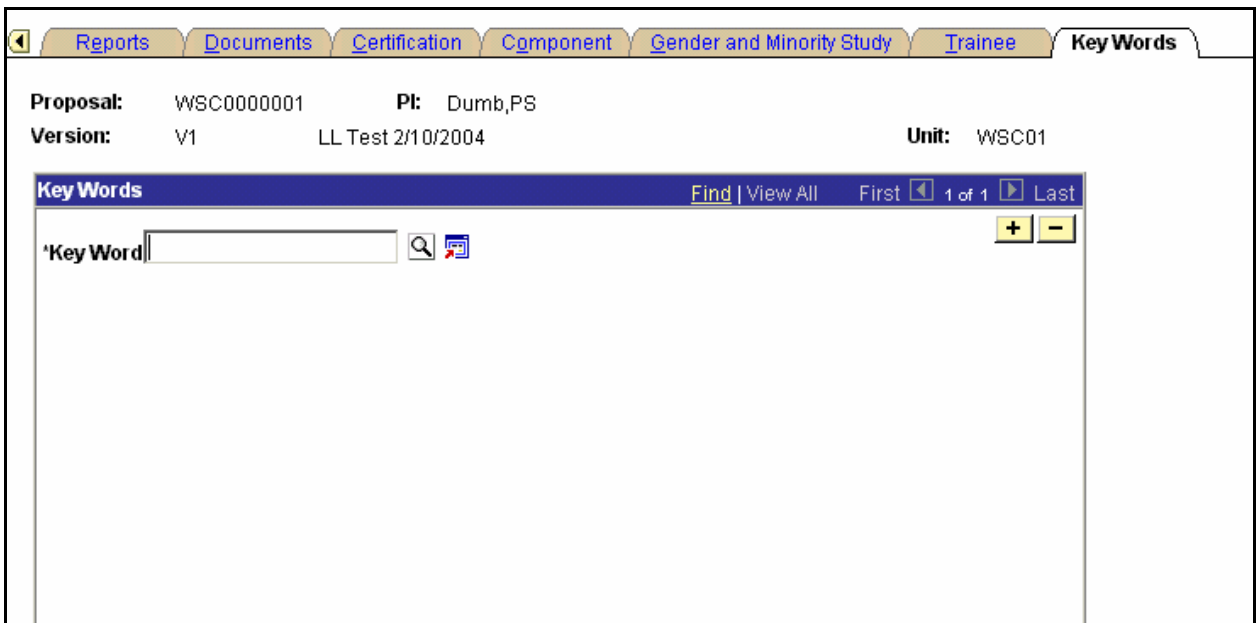
Certification Info Review and Status

'Certification Code	Certification Date	'Indicator	Certified By	Approval Date	Assurance Number	Exemption Number
AGE	02/10/2004	Yes	0050054	02/10/2004		

*Award specific certification codes can be added on this page. Ex: IRB, IACUC. NDUS will create the standard certifications for GO Live. If an institution later identifies additional certifications they will be responsible for populating their own certification codes table. [Setup Financials Supply Chain>Product Related>Grants>Certification](#)*

## Key Words Page

32. Click on the Key Words tab.



Reports | Documents | Certification | Component | Gender and Minority Study | Trainee | **Key Words**

Proposal: WSC0000001 PI: Dumb,PS  
Version: V1 LL Test 2/10/2004 Unit: WSC01

Key Words Find | View All First 1 of 1 Last

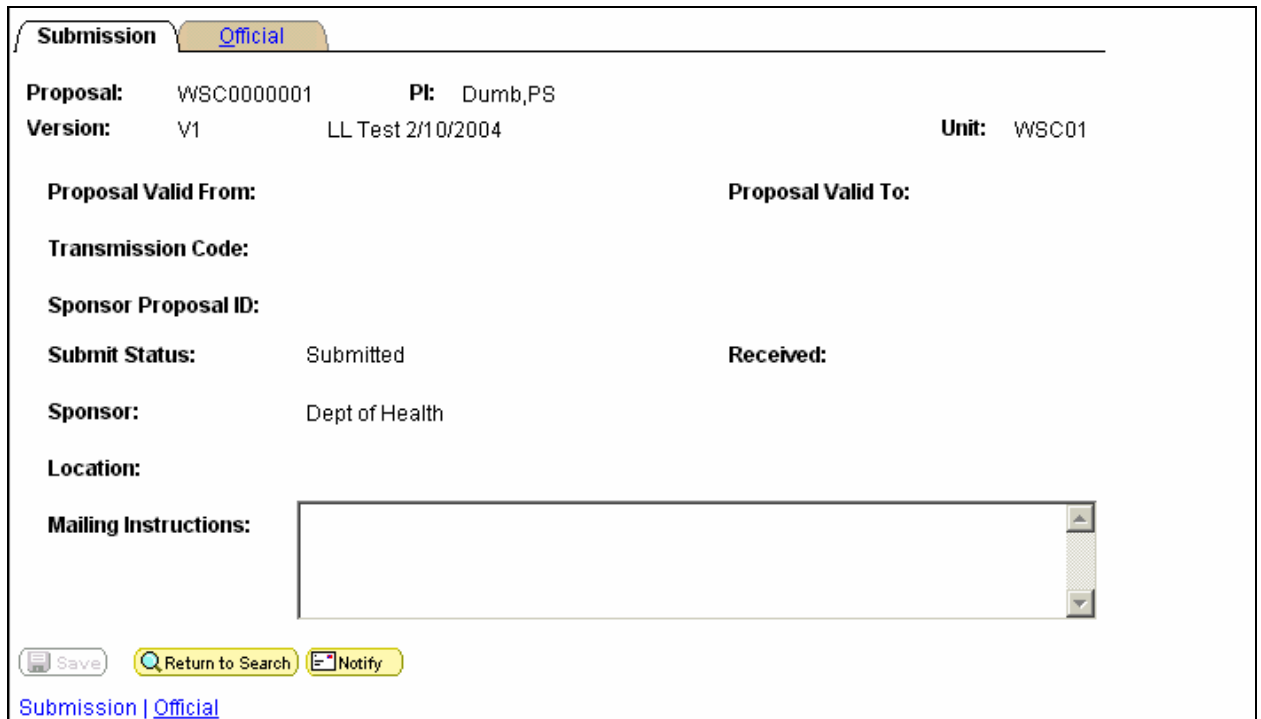
'Key Word' [input field] [search icon]

*Key words may be used to track proposals by subject category (for example cell biology; electrical engineering; history of science) and to link multiple science codes to a project (as required by Transaction Set 194).*

*Key words are not going to be established by NDUS for Go Live. If an institution later determines this information useful, they will be responsible for populating and maintaining their own keyword table. [Setup Financials Supply Chain > Product Related > Grants > Proposal Keyword](#)*

## GM 2.2 Submit Proposal

1. From the menu, select **Grants > Proposals > Submit Proposal**



**Submission** [Official](#)

**Proposal:** WSC0000001      **PI:** Dumb,PS  
**Version:** V1      LL Test 2/10/2004      **Unit:** WSC01

**Proposal Valid From:**      **Proposal Valid To:**

**Transmission Code:**

**Sponsor Proposal ID:**

**Submit Status:** Submitted      **Received:**

**Sponsor:** Dept of Health

**Location:**

**Mailing Instructions:**

[Submission | Official](#)

2. The **Submit Status** should always be [Submitted](#).
3. Click on the **Official** tab.

<a href="#">Submission</a>		<b>Official</b>	
<b>Proposal:</b>	WSC0000001	<b>PI:</b>	Dumb,PS
<b>Version:</b>	V1	LL Test 2/10/2004	<b>Unit:</b> WSC01
<b>Proposal Status:</b> Awarded			
<b>Proposal Submission Official</b>		Find   View All First 1 of 1 Last	
<b>Sequence:</b>	1	<b>Event Date:</b>	02/10/2004
<b>Submit for Approval</b>	<input checked="" type="checkbox"/>		
<b>Admin Official:</b>		<b>Approved</b>	<input checked="" type="checkbox"/>
<b>Financial Official:</b>		<b>Approved</b>	<input checked="" type="checkbox"/>
<b>Signing Official:</b>		<b>Approved</b>	<input checked="" type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/>			
<a href="#">Submission</a>   <a href="#">Official</a>			

4. **Proposal Status** will be updated to “Approved” meaning that the preaward office has approved the submission of this proposal to the agency.
5. Click on the **Save** button.