UNIVERSITY OF MISSOURI

PeopleSoft End User Training

ESTABLISHING PROPOSALS
TRAINING PARTICIPANT GUIDE

PEOPLESOFT FINANCIALS 9.0
GRANTS
NOVEMBER 2008
COPYRIGHT & TRADEMARKS

Copyright © 2003, 2007, Oracle. All rights reserved. Powered by OnDemand Software. Distributed by Oracle under license from Global Knowledge Software LLC. © 1998-2007. All rights reserved.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If this documentation is delivered to the United States Government or anyone using the documentation on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS
The U.S. Government’s rights to use, modify, reproduce, release, perform, display, or disclose these training materials are restricted by the terms of the applicable Oracle license agreement and/or the applicable U.S. Government contract.

Oracle, JD Edwards, PeopleSoft, and Siebel are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.
Table of Contents

Introduction .............................................................................................................................................. 1

Preparing and Copying Proposals ........................................................................................................... 1
  Create a Proposal ................................................................................................................................. 3
  Establish the Proposal Budget ............................................................................................................. 31
  Print a Signature Page ......................................................................................................................... 41
  Copy Proposal Information .................................................................................................................. 45

Appendix .................................................................................................................................................. 48
Introduction
The goal of this module is to present the concepts and procedures used for establishing proposals.

At the end of this module you will be able to:

- Create a new proposal.
- Enter proposal budget information.
- Print a signature page.
- Copy a proposal.

Preparing and Copying Proposals
Thousands of proposals are submitted yearly through the OSPA office. The PeopleSoft Grants module enables some control of the submission and award process as well as feeding information into the PeopleSoft accounting system.

Basic proposal information is entered into the Proposal segment of the module. This data serves as a history of the proposals. Queries and reports can access this information for statistical purposes.

When a proposal is awarded, the information from the Proposal segment is transferred into the Awards segment that also feeds into the Contracts segment for accounting purposes.

In order to establish a proposal, you will then take the following steps:

1. Enter basic proposal information.
2. Designate the appropriate F&A rate, establish budget periods, and enter budget lines.
3. Print a PSRS (signature page). Turn this in to OSPA along with the proposal, the appropriate number of copies, Sponsor/Agency guidelines, and other supporting documentation.

Warning: For security purposes, the PeopleSoft system logs you out of the application without saving your input after a 90-minute period of inactivity. Two minutes prior to your session timeout, the system provides a warning that your browser session is about to expire. You then have the option of continuing with your current session by clicking the OK button in the warning message. If you do not respond within two minutes, the session ends. To return to your application, click the Return to PeopleSoft Sign In link. The Sign In page displays, and you can sign in again to the application.

Other training materials and FAQs are posted at http://research.missouri.edu/ospa/index.htm (http://research.missouri.edu/ospa/index.htm).
Abbreviations used in preparing grant proposals:

CoPI or CoI - Co-Investigator
EmplID - Employee Identification Number
F&A - Facilities and Administration
GCA - Grants and Contracts Administrator
OSPA - Office of Sponsored Program Administration
PI - Primary Investigator
PCS - Program Classification Structure (Instruction, Research, Other, etc.)
PS - PeopleSoft
PSRS - Proposal Signature Routing Sheet (also known as Signature Page)
Create a Proposal

A proposal in PeopleSoft Grants consists of statement of work, research plans, technical reports, proposal budget, and administrative, personnel, and submission information.

Consider this scenario: You plan to study the effects of metabolism and age on weight loss. You need to create a proposal for this research that will be submitted for sponsorship. You will create a proposal and a proposal header then create a project profile for each project within the proposal. Finally, you will assign professionals to your projects.

Procedure

Navigation: Grants > Proposals > Maintain Proposal

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the Add a New Value tab.</td>
</tr>
</tbody>
</table>
**Training Guide**  
UMSYS FS 9.0 Grants - Establishing Proposals

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Enter or select the applicable business unit for the <strong>Business Unit</strong> field. For this training example, enter &quot;UMSYS&quot;.</td>
</tr>
<tr>
<td>3.</td>
<td>Accept the default of &quot;NEXT&quot; for the <strong>Proposal ID</strong> field so that PeopleSoft will assign the next proposal number.</td>
</tr>
<tr>
<td>4.</td>
<td>Click the <strong>Add</strong> button.</td>
</tr>
<tr>
<td>5.</td>
<td>The <strong>Proposal</strong> page will display. It is here you will enter proposal-specific details.</td>
</tr>
</tbody>
</table>

![PeopleSoft Proposal Page](Image)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 6.   | Enter a brief version name for the proposal into the **Description** field. For this training example, enter "**Metabolism Study 01**".  

**Note:** If you leave this field blank, the entry in the **Title** field appears by default. PeopleSoft uses this title in the award generation process to name the award. The name of the generated post-award project comes from the proposal project short title. |
Step | Action
---|---
7. | Enter or select the proposal due date for the **Due Date** field. For this training example, enter "11/01/2008".

8. | Select the proposal deadline type in the **Due Date Type** drop-down list. For this training example, click the **Postmark** list item.

9. | If applicable, enter the proposal deadline time in the **Due Date Time** field and select the deadline time zone from the **Time Zones for the U.S.** drop-down list.
Step | Action
--- | ---
10. | Enter the project title into the **Title** field. For this training example, enter "Studying changes in metabolism".
11. | Click the **Description** link to enter a longer, more descriptive title.
12. | The **Description** page will display. On this page you enter the full title. For this training exercise, the description has already been added.
### Step | Action
--- | ---
13. | Click the **OK** button to return to the **Proposal** page.
14. | In the **PI ID** field, you enter or select the 8-digit EmplID for the principal investigator.
### Step | Action
--- | ---
15. | Enter or select the ID of the organization that is sponsoring the research for the **Sponsor ID** field. For this training example, enter "8899000351".
   
   **Note:** If the sponsor is not listed, select "Unlisted Sponsor."
16. | In the **Pre-Award Administrator** field, you enter or select the 8-digit EmplID for the applicable OSPA Sr. Grants and Contracts Administrator.
17. | Enter or select a proposal purpose for the **Purpose** field. For this training example, enter "RESBA".
18. | Use the **Proposal Type** field to select predefined and institution-specific proposal types. For a new proposal entry, use the default selection of New.
19. | If available, enter the code in the **NSF Field of Science** field.
20. | Enter the CFDA number in the **CFDA** field, if known.
21. | Retain the default of "Draft" for the **Proposal Status** field.
### Step 22
Next you need to enter the start and end dates for the proposal. The system automatically creates the overall budget with the same dates.

Enter or select the desired information for the **Start Date** field, located above the Budget Periods section. For this training example, enter "07/01/2009".

### Step 23
Enter the desired information into the **End Date** field, located above the Budget Periods section. For this training example, enter "06/30/2013".

### Step 24
Enter the number of budget periods into the **No. Periods** field. For this training example, enter "2".

### Step 25
Click the **Build Periods** button.

When you first create a proposal as Draft, the **Budget Periods** grid contains blank start and end dates. When you enter the proposal start and end dates, enter a value in the **No. Periods** field, and click the **Build Periods** button, the system automatically inserts a row into the grid for each period. The first period start date and the last period end date are supplied by default from the proposal start and end dates.

After you enter and save the budget details on the **Budget Detail** page, the **Target Sponsor Budget** reflects the budget for each period. The **Target Sponsor Budget** amount displayed below the budget lines reflects the sum of all budget periods.

To re-initiate the build periods process, delete all rows in the grid to reactivate the **Build Periods** button. You can only re-initiate the process prior to saving the proposal. After you save the page, the numbers in the **Period** column of the grid become links to the **Budgets** page. If you copied a proposal, you can change the dates in the budget periods.

### Step 26
Enter or select the desired information for the **End Date** field of the first period. Enter "06302011".

### Step 27
Enter or select the desired information for the **Start Date** field of the second period. Enter "07012011".
Step | Action
--- | ---
28. | Click the **Projects** tab.

29. | The **Projects** page will display. Use this page to add or update projects that are associated with a proposal.

You can associate multiple projects with each proposal. Because the system uses a one-to-many relationship for proposals and projects, you can establish a separate project profile even in cases in which only one project is in a proposal.
Step | Action
--- | ---
30. | Enter or select the desired information for the Department field. For this training example, enter "A1301019".

**Note:** The DeptID and its description should reflect where the money will go when the account is set up for the project. The DeptID will also reflect the project's purpose, which is assigned with the PCS coding. It will have an 11 in the DeptID description if a project is for instruction, a 22 if it is for research, or a 32 if it is an "other" sponsored activity.

31. | Press [Enter].

32. | The Subdivision and Institution fields are automatically populated.

33. | If additional projects are needed for a proposal, click on the add a new row button (plus sign button) to the right of the Primary check box. Enter the Title (it is recommended that a title be used that distinguishes the additional project from the primary and any others) and Department for the added project.

Do not check the Primary box for additional projects because only one Primary project per proposal is allowed. For some of the subsequent panels, information will need to be entered for all projects separately.
34. Click the **Checklist** tab.

35. The **Checklist** page will display. This page enables you to provide additional information about your project.

   Answer the questions with Yes or No; every question must be answered. Refer to the table on the next page for the description or instructions for each question.
<table>
<thead>
<tr>
<th>Checklist Question</th>
<th>Description/Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is this a Multi-UM Campus project?</td>
<td>Respond “Yes” if the proposal involves more than one Business Unit.</td>
</tr>
<tr>
<td>Is this project related to a University License or assigned patent?</td>
<td>Respond “Yes” if the work to be done relates to an existing University license or patent.</td>
</tr>
<tr>
<td>Will this proposed project produce discoveries or inventions that may result in a patent?</td>
<td>Respond “Yes” if there is a possibility that the work to be done will produce discoveries or inventions that may result in a patent. Contact the patent and licensing office on your campus for procedures involved in patents.</td>
</tr>
<tr>
<td>Is the principal investigator requesting extra compensation?</td>
<td>Respond “Yes” if the PI wants additional pay beyond his/her regular salary.</td>
</tr>
<tr>
<td>Will space that does not currently exist be required for this project?</td>
<td>Respond “Yes” if space that does not currently exist and will be necessary for this project.</td>
</tr>
<tr>
<td>Does this project have sponsor proprietary information?</td>
<td>Respond “Yes” if the personnel involved in the project will utilize any of the sponsor’s proprietary information.</td>
</tr>
<tr>
<td>Are you requesting release time?</td>
<td>Respond “Yes” if the PI is requesting release time. Fields will appear to designate the dates. Complete those.</td>
</tr>
<tr>
<td>Is this related to a previous proposal?</td>
<td>Respond “Yes” if this proposal is related to a previous proposal or project. Additional field will open to enter the related proposal number.</td>
</tr>
<tr>
<td>Does this project require computing, data storage, or data networking capabilities exceeding those of routine desktop computing?</td>
<td>Respond “Yes” if the project will require extraordinary computing, data storage, or data networking capabilities beyond the capacity of the average desktop computer.</td>
</tr>
<tr>
<td>Is this project related to Food for 21st Century?</td>
<td>Respond “Yes” if the proposal is related to Food for the 21st Century.</td>
</tr>
<tr>
<td>If this proposal is awarded, may it be included in the Model Proposals File available for campus users?</td>
<td>Respond “Yes” if an awarded proposal may be included in the Model Proposals File and be made available to other campus users.</td>
</tr>
<tr>
<td>Will any foreign national, including our faculty, staff, or students, be involved in this project?</td>
<td>Respond “Yes” if any foreign nationals will be involved with this project.</td>
</tr>
<tr>
<td>Does any part of the project take place outside the United States?</td>
<td>Respond “Yes” if any portion of this project will be conducted outside the United States.</td>
</tr>
<tr>
<td>Does the project involve any entity (sponsor, collaborators, consultants, suppliers, etc.) outside the United States?</td>
<td>Respond “Yes” if the project will involve foreign entities (e.g., businesses or other institutions of higher education) outside the United States.</td>
</tr>
<tr>
<td>Is there cost share on this project?</td>
<td>Respond “Yes” if cost share is budgeted on the proposal.</td>
</tr>
</tbody>
</table>
36. After answering the questions, click the **Save** button.

When data are saved, PeopleSoft assigns proposal and project numbers. Although it is possible to locate your proposal in PS Grants by a number of methods, using the proposal number is the easiest.
37. PeopleSoft has assigned a Proposal ID for your proposal.

38. Click the **Budgets** tab.

39. The **Budgets** page will display. This page is where you enter budget header information.

40. PeopleSoft populates the **Budget ID** and **Description** fields with a 1.
### Step 41

Click the **F & A and Pricing Setup** link.

[F & A and Pricing Setup](#)
Step 42. Enter or select the desired information for the Rate Type field. For this training example, enter "RESOF".

**Note:** Once you have chosen a Rate Type, you cannot change it by using the delete or backspace key; you must delete the row by clicking on the minus (-) sign and then choose a new Rate Type.
Step 43. Scroll down as needed and click the **Apply** button.

![PeopleSoft screenshot showing the 'Apply' button in the context of establishing grants proposals.](image-url)
Step 44. Note that the Effective Dates and FA Rates populate for the Institution and Budget areas. Make changes to the rates as necessary.

Click the **OK** button and you will return to the **Budgets** page.
Step | Action
---|---
45. | Click the **Resources** tab.

46. | Use the **Resources** page to maintain information about each resource for a proposal project. These resources are used by Research or Workflow. This page uses NIH (National Institute of Health) resource types and draws from a control table in which you can add as many resource types as you need.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>47.</td>
<td>Use the <strong>Type</strong> field to enter a resource type. The system-delivered resource types include Laboratory, Clinical, Animal, Computer, Office, Other, Major Equipment, Other Resources (NSF Specific), and Other Resources. Enter or select the desired information for the <strong>Type</strong> field. For this training example, enter &quot;<strong>MAJOR</strong>&quot;.</td>
</tr>
<tr>
<td>48.</td>
<td>Click the <strong>Add Row</strong> button to add more rows for additional Resource Types.</td>
</tr>
<tr>
<td>49.</td>
<td>Enter or select the desired information for the <strong>Type</strong> field. For this training example, enter &quot;<strong>LABOR</strong>&quot;.</td>
</tr>
<tr>
<td>50.</td>
<td>Click the <strong>Add Row</strong> button.</td>
</tr>
<tr>
<td>51.</td>
<td>Enter or select the desired information for the <strong>Type</strong> field. For this training example, enter &quot;<strong>OTHER</strong>&quot;.</td>
</tr>
</tbody>
</table>
### Step 52
Select the **Research** check box to map the professional to the appropriate form. Selecting this option also distinguishes the research team administratively from individuals who are related to the proposal creations. Select this field if listing a person whose name appears on the form and is part of the project team during the project generation process. Clear this field if listing a person only for workflow approval process.

### Step 53
The **Employee ID**, **Name**, and **Role** fields are automatically populated in existing projects when you enter the name of the PI on the **Proposal** page. This occurs only in projects that have a blank grid for professionals. PI row-level security is used for professionals with a role type of PI in the proposal professional resources.

### Step 54
If needed, you can click on the **Details** button to enter additional information about the professionals.

### Step 55
Click the **UM Cert** tab.

### Step 56
Use the **UM Cert** page to maintain all relevant proposal-specific certifications, and enter multiple certifications for each proposal project.

### Step 57
Use the **Certification** section to enter certifications for each proposal project. Certification values that appear on this page are based on the PI and the institution that is associated with the PI that you select on the **Proposal** page.

### Step 58
Enter or select the certification codes associated with the proposal for the **Certification Code** field. For this training example, enter "HUMA".
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>59.</td>
<td>Select the certification indicator from the <strong>Indicator</strong> drop-down list. For this training example, click the <strong>Yes</strong> list item.</td>
</tr>
<tr>
<td>60.</td>
<td>Enter the desired information into the <strong>Assurance Number</strong> field if available. For this training example, enter &quot;56321&quot;.</td>
</tr>
<tr>
<td>61.</td>
<td>Click the <strong>Reports</strong> tab.</td>
</tr>
<tr>
<td>62.</td>
<td>Use the <strong>Reports</strong> page to set up PeopleSoft Grants report types for a proposal project.</td>
</tr>
<tr>
<td>63.</td>
<td>Use the <strong>Report</strong> grid to select a report type, and then add any comments about the report. You can add rows to enter additional report types.</td>
</tr>
</tbody>
</table>
64. Use the **Type** field to select a report type. Values include: Abstract, Major Goals, and Progress Report Summary.

Click the **Major Goals** list item in the **Type** drop-down list.

65. Enter as much information as needed in the **Comments** box. Copying and pasting from other documents into this field is recommended.

In this training exercise, the comments have been added for you.

66. Click the **Location** link at the bottom of the page.

67. Use the **Location** page to enter address information for each project within a research proposal as well as information concerning where the research for a project is conducted.

Verify the default information and change if needed.
68. Click the Keywords link at the bottom of the page.

   Keywords

69. Use the KeyWords page to link key words to a proposal and its projects.

   Note: You must enter or select at least one key word.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>70.</td>
<td>Enter or select the desired information for the <strong>Key Word</strong> field. For this training example, enter &quot;GENETICS&quot;.</td>
</tr>
<tr>
<td>71.</td>
<td>To add another key word, you click the Add Row button (plus sign button).</td>
</tr>
<tr>
<td>72.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td>73.</td>
<td>The <strong>Description</strong> field is now populated with the new key word description.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
74. | Click the **Show following tabs** button.
75. | Click the **Mailing Instructions** tab.
### Step 76
The **Mailing Instructions** page will display. On this page you indicate the sponsor's location to which the proposal should be mailed and any additional instructions for mailing.

Enter or select the desired information for the **Transmission** field. For this training example, enter "CTF" for certified mail.

### Step 77
Enter or select the sponsor's location for the **Location** field. Click the **Look up Location (Alt+5)** button.

**Note:** If a different address is needed, tab out of the **Location** field and override the mailing address. If using an unlisted sponsor, leave this field blank, select the **New Sponsor** check box, and enter the applicable mailing address in the fields.

### Step 78
For this training example, click the third link in the search results.

### Step 79
Enter the number of originals to be mailed to the sponsor into the **Original** field. Enter "1".
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>80.</td>
<td>Enter the number of copies to be mailed to the sponsor into the <strong>Copies</strong> field. For this training example, enter &quot;3&quot;.</td>
</tr>
<tr>
<td>81.</td>
<td>Click the <strong>Show following tabs</strong> button.</td>
</tr>
<tr>
<td>82.</td>
<td>Click the <strong>UM Share Credit</strong> tab.</td>
</tr>
<tr>
<td>83.</td>
<td>The <strong>UM Share Credit</strong> page will display. This page enables you to show the shared credit distribution of this project (Research Incentive Fund (RIF)). PeopleSoft populates the current date in the <strong>EFFDT</strong> field. Do not change this date. Proper information will not display on the PSRS if this date is after the date you run the PSRS.</td>
</tr>
<tr>
<td>84.</td>
<td>Click the <strong>Load</strong> button to load the PIs and Co-PIs listed on the Resources panel.</td>
</tr>
<tr>
<td>85.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>86.</td>
<td>Once the <strong>Load</strong> button is clicked, the other Co-investigators (if any) from the <strong>Resources</strong> page will be displayed. Click the add additional rows button (plus sign button) to add more individuals and DeptIDs as needed.</td>
</tr>
</tbody>
</table>
### Step 87
- **Action**: The **Share** field is populated with 100% on the first line. Change the percentage as needed. The total must equal 100%.

### Step 88
- **Action**: Click the **Effort** tab.

### Step 89
- **Action**: The **Effort** page will display. This page allows you to show the percent effort for the personnel on the project to enable better record keeping for department personnel. This page is optional.

### Step 90
- **Action**: You have successfully completed the procedure for creating a proposal. **End of Procedure.**
Establish the Proposal Budget

After establishing a proposal in the proposal process, you define the proposal budget. This budget captures budget line details that support your pre-award and post-award functions.

The proposal budget includes direct costs such as personnel, animals, equipment and supplies, cost sharing, justifications, and facilities and administration costs.

Consider this scenario: You have a budget for metabolism research. You decide to use two budget periods and you anticipate that the funds will be spent on multiple budget categories. Your goal is to establish this proposal budget.

Procedure

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Enter or select the applicable business unit for the <strong>Business Unit</strong> field. For this training example, enter &quot;<strong>UMSYS</strong>&quot;.</td>
</tr>
<tr>
<td>2.</td>
<td>Enter or select the desired information for the <strong>Proposal ID</strong> field. For this training example, enter &quot;<strong>0020909</strong>&quot;.</td>
</tr>
<tr>
<td>3.</td>
<td>Enter or select the desired information for the <strong>Version ID</strong> field. Enter &quot;<strong>V101</strong>&quot;.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>4.</td>
<td>Enter or select the desired information for the <strong>Proposal Project ID</strong> field. Enter &quot;00022878&quot;.</td>
</tr>
<tr>
<td>5.</td>
<td>Enter or select the desired information for the <strong>Budget ID</strong> field. Enter &quot;1&quot;.</td>
</tr>
<tr>
<td>6.</td>
<td>Enter the desired information into the <strong>Budget Period</strong> field. Enter &quot;1&quot;.</td>
</tr>
<tr>
<td>7.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>8.</td>
<td>The <strong>Enter Budget Detail</strong> page will display. Use this page to store detailed budget information by budget item. The page divides the total funding responsibilities of the sponsor and total cost sharing between the institution and any third parties. It also displays a breakdown of direct and F&amp;A (indirect) budget amounts.</td>
</tr>
<tr>
<td>9.</td>
<td>If you create a proposal that lists specifically funded amounts for the overall budget and do not enter budget details for each period, the system sets the contract totals and award funding totals to zero when you run the award generation process. The system uses the budget detail amounts that you enter to create the resulting contract and funding amounts on the award pages. Therefore, if you do not enter budget details before you run the award generation process, you will have to enter the information manually in both Grants and Contracts.</td>
</tr>
<tr>
<td>10.</td>
<td>Use the <strong>Details, CostShare, Justification</strong> grid to enter detail lines by budget period. Multiple lines can exist for a single budget category. During line entry, the system displays totals, including the target budget amount and a breakdown of the current budget amount.</td>
</tr>
</tbody>
</table>
11. Enter or select the desired information for the **Budget Item** field. For this training example, enter "**SALARY**".

12. Click the **Details** button.

13. The **Personnel Detail** page will display. Use this page to enter personnel budget details. Enter or select information concerning appointment type, start and end dates, cost of living and merit increase percentages, salary, and fringe rates.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.</td>
<td>When you move out of the <strong>Row No</strong> field, the system populates various fields on the page. Enter or select the desired information for the <strong>Row No</strong> field. Enter &quot;1&quot;.</td>
</tr>
<tr>
<td>15.</td>
<td>Press <strong>[Tab]</strong> to populate the fields.</td>
</tr>
<tr>
<td>16.</td>
<td>For this example, the <strong>Total Salary</strong> and <strong>Total Fringe</strong> values equal a personnel budget item of $43,808.00.</td>
</tr>
<tr>
<td>17.</td>
<td>Click the <strong>OK</strong> button after verifying the information.</td>
</tr>
</tbody>
</table>
### Step 18

If the amount in the **Total Direct** field is a whole dollar amount, then the values in the **Sponsor Direct** and **Cost Share** (if applicable) fields will also be in whole dollar amounts.

If, however, the amount in the **Total Direct** field is a fraction, a fraction will also be reflected in the **Sponsor Direct** field.

If there is cost sharing on the line, then the fraction will be allocated to the **Cost Sharing** column and a whole dollar amount will appear in the **Sponsor Direct** field.

### Step 19

Click the **Cost Share** link to distribute cost sharing commitments by budget summary line.

### Step 20

Click the **Add Row** button (plus sign button) to add more budget items.
### Step 21
Enter or select the desired information for the **Budget Item** field. For this training example, enter "**FRINGE**".

### Step 22
Click the **Details** button.

### Step 23
Enter the desired amount into the **Total Direct** field. For this training example, enter "**7000.00**".

### Step 24
Click the **OK** button.

### Step 25
The FRINGE budget item is added to the **Line Data**.

### Step 26
In this training exercise, the remaining budget line items have been added for you.
### Step Action

27. Click the **Save** button.

28. Click the **Return To Maintain Proposal** link.
Step | Action
--- | ---
29. | You complete the same steps to enter details for the second budget period. Click the 2 link in the **Period** column.
Step | Action
--- | ---
30. | The **Budgets** page will display.

Click the **2** link again in the **Period** column.

31. | On the **Enter Budget Detail** page for budget period 2, add budget line items like you did for budget period 1.
32. In this training exercise, the budget items have been added for you. Click the **Save** button.

33. Click the **Return To Maintain Proposal** link to return to the **Budgets** page.

34. Notice the **Amount** field is now populated for the second budget period.

35. You have successfully completed the procedure for establishing proposal budget information. **End of Procedure.**
Print a Signature Page

After entering basic proposal information and budget details, you need to print a PSRS (signature page) to turn in to OSPA along with the proposal. The signature page must be signed in all the necessary places by the authorized officials before the proposal can be submitted to the sponsor.

Procedure

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | If you do not have a Run Control ID, you will need to create one. Click the **Add a New Value** tab.  
**Note:** If you already have a Run Control ID, enter the Run Control ID on the **Find an Existing Value** page and click the **Search** button. |
| 2.   | Enter the desired information into the **Run Control ID** field. For this training example, enter "SIGPAGE".  
**Note:** You will use the same Run Control ID each time you print a signature page. |
| 3.   | Click the **Add** button. |
4. The **Signature Page** will display. Enter the desired information into the **BU** field. For this training example, enter "**UMSYS**".

5. Enter or select the desired information for the **Proposal ID** field. For this training example, enter "**0020909**".

6. Enter or select the desired information for the **Version ID** field. For this training example, enter "**V101**".

7. Click the **Save** button to create your Run Control ID.

8. Click the **Run** button to start the report process.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.</td>
<td>The <strong>Process Scheduler Request</strong> page will display. Click the <strong>PSUNIX</strong> list item in the <strong>Server Name</strong> drop-down list.</td>
</tr>
<tr>
<td>10.</td>
<td>Click the <strong>Email</strong> list item in the <strong>Type</strong> drop-down list. This process sends a copy of the signature page to the e-mail address of the person who is signed on and running the report. The file will arrive in PDF format and can be opened with Acrobat Reader. You may then print it to your local printer.</td>
</tr>
<tr>
<td>11.</td>
<td>Click the <strong>PDF</strong> list item in the <strong>Format</strong> drop-down list.</td>
</tr>
</tbody>
</table>
12. Click the **OK** button.

An e-mail with the signature page PDF attached should arrive shortly in your inbox.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>

13. You have successfully completed the procedure for printing a signature page.

**End of Procedure.**
Copy Proposal Information

PeopleSoft Grants enables you to copy proposal information from one proposal to another. You can copy a proposal ID along with projects, budget headers, and periods. This feature saves you time by avoiding entering duplicate information.

Consider this scenario: You need to create a new proposal for a study that is similar to an existing proposal created by another researcher in your group. Your goal is to copy the initial proposal.

Procedure

**Navigation:** Grants > Proposals > Copy Proposal

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Enter or select the desired information for the Business Unit field. For this training example, enter &quot;UMSYS&quot;.</td>
</tr>
<tr>
<td>2.</td>
<td>Enter or select the desired information for the Proposal ID field. For this training example, enter &quot;0020909&quot;.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the Search button.</td>
</tr>
<tr>
<td>4.</td>
<td>The Copy Proposal page will display. Use this page to copy proposal information.</td>
</tr>
</tbody>
</table>
5. You can enter or select a proposal number for the To Proposal field or accept the default of NEXT to have PeopleSoft assign a new number. Here we are retaining the default.

6. Use the Budget Period section to define the budget periods for the new proposal. For this example, retain the values in the To Start Date and To End Date fields.

7. Leave the From Project ID check box selected unless you want a different project ID copied.

8. Use the To Project ID field to select the project ID you want to copy to the new proposal, or accept the system defaults to have PeopleSoft assign a new number. Here we are accepting the default.

9. The Budget check box should be selected if you want the budget copied.

10. Use the To Budget ID field to select the budget ID you want to copy to the new proposal or accept the system defaults.

11. After all the information is correct, click the Copy button.
12. All fields in the **Proposal** page appear by default from the proposal that you are copying.

While by default the target proposal has the same dates as the source proposal from which it is copied, you can change the start and end dates on the target proposal. If you don't change the dates, you will get a mirror copy of the source proposal. If you change the dates during the copy process all of the detail rows under each period will be assigned the dates entered for the period on the copy page.

13. You have successfully completed the procedure for copying a proposal. **End of Procedure.**
Appendix

Program Classification Structure (PCS) Codes
(Integrated in the DeptID structure)

1.0 INSTRUCTION

1.1 General Academic Instruction
Includes those instructional activities that enable one to receive credit toward a higher education degree or certification in an academic program field of study.

2.0 RESEARCH

2.2 Individual and Project Research
Includes those research activities that normally are managed within the academic departments. These research activities usually have stated goal or purpose, have projected outcomes, and are created for specified time periods as a result of a contract, grant, or specific allocation of institutional resources. Also included here are any separately budgeted departmental research activities that may lead to research outcomes.

3.0 PUBLIC SERVICE

3.2 Community Services
Includes those non-instructional activities established and maintained by an institution to provide services to the general community or special sectors within the community. All non-instructional, non-degree credit services which do not meet the criteria for awarding Continuing Education Units (CEU) should be reported in this subprogram.

8.0 STUDENT FINANCIAL AID

8.1 Scholarships
Includes the expenditures of funds awarded to undergraduate students as grants-in-aid, trainee stipends, tuition and fee remissions, and prizes. Excluded from this category are work/study funds that should be classified as costs to the subprogram to which the service is rendered. Student loans are excluded also.

8.2 Fellowships
Include the expenditure of funds for graduate students as outright grants-in-aid and trainee stipends. Excluded from this category are funds for which services to the institution must be rendered e.g., teaching assistants or research assistants. Student loans are excluded also.