

# START myResearch

## Aggregator Instructor-led Training

### TRAINING GUIDE



UNIVERSITY OF ILLINOIS SYSTEM

**Altogether Extraordinary™**

# START myResearch Aggregator Instructor-led Training

## Training Guide

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## Acknowledgements

Portions of this manual are based on Ellucian *Banner* System, Release 8.2.

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## Course Information

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## Course Overview

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### Welcome to START myResearch Aggregator Instructor-led Training

In this course, we will cover a variety of topics including:

- myProposals
- myResearch Portal
- Job Aids and Training location
- Contact Information

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## Course Objectives

At the end of this session, you will be able to:

- Create and Submit a Sponsored Research Proposal
- Notify Approvers to Approve a Proposal
- Locate Contact and Training Information

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## Lesson 1: Getting Started

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### 1.1: List of Systems

START myResearch consists of several different systems. Those systems are as follows:

1. myResearch Portal
2. myDisclosures
3. myProposals
4. myFCOI Checklist

This course will discuss primarily *myResearch Portal* and *myProposals*.

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### 1.2: Roles & Permissions

Business Managers can get access to administer sponsored project information for entire departments or organizations by contacting their Unit Security Contact or USC. The USC must complete a request through the Security Application <https://webprod.admin.uillinois.edu/secapp/index.html>

Principal Investigators (PIs) can designate delegates. Delegates can then have access to the PIs entire myResearch Portal Portfolio. PIs need to complete the myResearch Portal Support Form [https://appserv7.admin.uillinois.edu/FormBuilderSurvey/Survey/AITS/START\\_myResearch/myResearch\\_Portal\\_Support\\_Form/Survey](https://appserv7.admin.uillinois.edu/FormBuilderSurvey/Survey/AITS/START_myResearch/myResearch_Portal_Support_Form/Survey)

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### 1.3: General Information

1. Do not use the **Back** button in *myProposals*.
2. You must close proposals. If you do not close them, they will stay open and in a locked status.
3. Logout will log you out of all applications open in other tabs within the same browser.
4. Chart 9 in START myResearch applications will appear as 9C, 9S, or 9U. **Lead Unit** examples are 9C699000 and 9U699000. If you add personnel to a proposal that has an appointment in Chart 9, you will need update the unit number accordingly.
5. For Help, email [startmyresearchhelp@uillinois.edu](mailto:startmyresearchhelp@uillinois.edu)
6. **Emails are live and in production. If you add a NetID or UIN of someone, you will send an actual email to that person. For training purposes, please only add others in class.**
7. Visit our website to download a copy of this guide and access all training materials [https://web.uillinois.edu/start\\_myresearch/my\\_proposals\\_help](https://web.uillinois.edu/start_myresearch/my_proposals_help)

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## 1.4: Help, Website, Training, & Contact Information

Visit our website to find information to get help and training. A copy of this guide is available on this website.

[https://web.uillinois.edu/start\\_myresearch/](https://web.uillinois.edu/start_myresearch/)

Contact Us:

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Champaign

Sponsored Programs  
Administration

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Champaign, IL 61820

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Springfield

Research & Sponsored Programs

One University Plaza, MS PAC  
525

Springfield, IL 62703

217-206-7409

[ora@uis.edu](mailto:ora@uis.edu)

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## 1.5: Links to Non-Production Environments

We will be utilizing non-production environments for training today. These environments are for training and testing. **Emails will still be sent out**, but all other data will not be used in production.

Please use the following links for our class:

**myProposals** <http://go.uillinois.edu/1>

**myResearch Portal** <http://go.uillinois.edu/2>

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## Lesson 2: Creating & Submitting Proposals

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### 2.1: Creating a Proposal

*myProposals* is the system replacing the **Proposal Intake Form (PIF)** and **Proposal Approval (PAF)**. *myProposals* has many of the same required fields as the **PIF** and **PAF** in addition to some new fields.

To create a new proposal, follow along with your instructor with the steps below.

For training purposes, we will be using a non-production database. Please use the following website to <http://go.uillinois.edu/1> for training purposes.

Once you have logged in, there are a few buttons on the top right to review.

- **Help** link – Directs you to our Help Pages [https://web.uillinois.edu/start\\_myresearch/my\\_proposals\\_help](https://web.uillinois.edu/start_myresearch/my_proposals_help)
- **Action List** – Provides a list of proposals you created that have not been submitted to Central Office.
- **Doc Search** – Enables you to search for a proposal by the **Doc Nbr.**
- **User: NetID** – Allows you to logout of the system.

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### 2.2: Completing the Basics Tab – Proposal Details

Follow the steps below with your instructor. Enter the information in the **Example** column.

Step	Task	Example
1.	Click <b>Researcher</b> .	
2.	Click <b>Create Proposal</b> .	
3.	Select a <b>Proposal Type</b> .	New
4.	Select the <b>Lead Unit</b> . <b>OR</b> Type in the chart and org for the unit (Example: 1-101000, 2-100000, 9C699000, 9S699000, 9U699000).	Choose your own unit
5.	Select the <b>Activity Type</b> .	Research Applied
6.	Select the <b>Project Dates</b> .	November 1 of next year and October 31 four years from now
7.	Enter the <b>Project Title</b> . <b>NOTE:</b> There is a 200 character limit.	myProposals Testing #1
8.	a. Enter text in <b>Sponsor</b> to automatically search (optional). b. Select the sponsor. <b>NOTE:</b> Searches are done by acronym and then sponsor name (Example: NSF). <b>OR</b> a. Click the <b>Sponsor Lookup</b> icon. b. Enter in search criteria by <b>Sponsor Code</b> , <b>Sponsor Name</b> , <b>Acronym</b> or other fields	NSF



	<p>(optional).</p> <p><b>NOTE:</b> Use * for wildcards.</p> <p>c. Click the <b>Search</b> button.</p> <p>d. Locate the sponsor, and click the <b>Select</b> button.</p> <p><b>NOTE:</b> If sponsor cannot be located in the system, select <b>Sponsor Not Listed</b>, and then click the <b>Can't find a sponsor? Find 'Sponsor Not Listed' or Type '116851' and click here to request a new sponsor here link.</b></p>	
9.	Click the <b>Save and Continue</b> button.	
10.	<p>Enter in a <b>Prime Sponsor Code</b> if funds originated from a source other than the <b>Sponsor</b> (optional).</p> <p>a. Enter text in <b>Prime Sponsor Code</b> to automatically search (optional).</p> <p>b. Select the sponsor.</p> <p><b>OR</b></p> <p>a. Click the <b>Sponsor Lookup</b> icon.</p> <p>b. Enter in search criteria by <b>Sponsor Code, Sponsor Name, Acronym</b> or other fields (optional).</p> <p><b>NOTE:</b> Use * for wildcards.</p> <p>c. Click the <b>Search</b> button.</p> <p>Locate the sponsor, and click the <b>Select</b> button.</p>	
11.	Click the <b>Save and Continue</b> button to advance to the next screen.	

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### 2.2.1: Persistent Menu Items

*myProposals* has a few persistent menu items that appear after you complete the Proposals Details screen. Those items are:

- Doc Nbr - Auto assigned number from myProposals.
- Initiator - NetID of the person that originally created the proposal.
- Status - The current status of the proposal.
- **View in myResearch Portal** link - This link will take you directly to the proposal within the *myResearch Portal* application.
- **Central Office Contact** link - This link will open a pop-up that displays the contact information for the specialist from the Central Office assigned to assist you.
- Data Validation - Turning on data validation will review all screens of your proposal and provide warnings or errors to items that are missing or are incorrect.
- Copy - Copies the proposal.
- Link - Provides the URL to the current screen in the proposal.
- Help - Provides a list of web-pages to obtain additional help.
- Proposal # in the upper left – use that number to search for this proposal in *myResearch Portal*.

## 2.3: Completing the Basics Tab – Delivery Information and Sponsor & Program Information

### *Delivery Info*

Step	Task	Example
1.	Select who will submit the proposal to the sponsor (Central Office or Unit) in <b>Submission By</b> .	Central Office
2.	Select a <b>Submission Type</b> . <b>NOTE: Electronic</b> includes submission via email or website.	Electronic
3.	Enter the <b>Number of copies</b> (if applicable).	
4.	Enter the <b>Sponsor Mailing Address</b> or <b>Electronic Submission System</b> . <b>NOTE:</b> For <b>Electronic Submission System</b> , specify the agency or electronic system information. <b>UIUC Only NOTE:</b> If you selected <b>US Mail</b> , the <b>Sponsor Mailing Address</b> is required.	Fastlane
5.	Click the <b>Save and Continue</b> button to advance to the next screen.	

### *Sponsor & Program Information*

Step	Task	Example
1.	Enter the <b>Sponsor deadline</b> in Central Standard Time. <b>NOTE:</b> Time is entered in military time <b>OR</b> using AM/PM (Examples: 17:00 or 05:00 PM). <b>NOTE:</b> If this is a subaward, enter the deadline to submit to the <b>Submitting Institution</b> and not the <b>Prime Sponsor deadline</b> . <b>NOTE:</b> For open submissions, leave this deadline blank or choose <b>Targeted</b> from <b>Sponsor Deadline Type</b> .	June 30 of next year at 5:00 PM
2.	Select the <b>Sponsor Deadline Type</b> .	Hard
3.	Select the <b>Notice of Opportunity</b> .	Federal Grant Solicitation
4.	Enter the <b>Opportunity ID</b> . <b>NOTE:</b> This is the funding opportunity announcement number.	NSF 18-999
5.	Enter the <b>Temporary Application ID</b> (if applicable).	7875039
6.	Enter the <b>Final Sponsor Proposal ID</b> (if applicable). <b>NOTE:</b> This is the identifying number given by the sponsor upon submission of an application (NSF Proposal ID, Grants.gov Tracking #).	
7.	Click the <b>Save and Continue</b> button to advance to the next screen.	

## 2.4: Adding Key Personnel

Key personnel must be from the same University campus/location as the proposal. Do not add Key personnel from another University campus/location. For example, a UIUC proposal should not list any Key Personnel from UIC or UIS. If a UIUC proposal has Key Personnel from UIC, a separate proposal should be created at UIC, the UIC Key Personnel should be added to that proposal, and then the proposal should be submitted to the Central Office at UIC. For more questions, please contact your Central Office for assistance.

Step	Task	Example
1.	Click the <b>Add Personnel</b> button. <b>NOTE:</b> At least one <b>Principal Investigator</b> is required.	
2.	<p>a. Enter in only the <b>NetID</b> or <b>UIN</b>. <b>NOTE:</b> All other fields will populate automatically from <b>Banner</b>. <b>NOTE:</b> Searching by <b>NetID</b> or <b>UIN</b> will result in more accurate searches. If searching by <b>Name</b>, you may need to use * (wildcards) or double check the spelling.</p> <p>b. Click <b>Continue</b>.</p> <p>c. Select the employee.</p> <p>d. Click the <b>Continue...</b> button.</p>	<p>Add the person to your left</p> <p>OR</p> <p>UIUC use bbachma2 or elliot6</p> <p>UIC use ander020 or mmcand1 or clearyk</p> <p>UIS use kdung1 or ralsb01s</p>
3.	Select a role in <b>Assign a role</b> . <b>UIC only NOTE:</b> The role of <b>Key Person</b> will require you to type in a specific role.	PI
4.	Click the <b>Add Person</b> button.	
5.	Repeat these steps to add additional <b>Key Personnel</b> (optional).	<p>Add the person to your right as Co-I</p> <p>Add the person two to your left as Co-PI</p> <p>UIC Only add the person two to your right as Key Person - OSC</p>
6.	<p>To add an additional <b>Units</b> for a <b>Key Personnel</b> (i.e. if an Investigator has multiple appointments):</p> <p>a. Click on the person's name.</p> <p>b. Click the <b>Add/Change Units</b> link.</p> <p>c. In <b>Unit Number</b>, type in the campus and six-digit org. (Example 1-101000).</p> <p>d. Click the <b>Search</b> button.</p> <p>e. Check to select the additional <b>Unit Number</b>.</p> <p>f. Click the <b>Return Selected</b> button.</p> <p>g. Repeat these steps to add additional Unit if necessary.</p> <p><b>UIC only NOTE:</b> The system will require approval from all units that are added.</p>	<p>For the PI, add an additional unit of:</p> <p>UIUC 1-681000 UIC 2-449000</p> <p>UIS 4-286000</p> <p>For the Co-I, add additional unit of:</p> <p>UIUC 9U699001 UIC 9C699001</p> <p>UIS 9S699001</p>
7.	<p>Add <b>Effort</b> for each person added to <b>Key Personnel</b></p> <p>a. Click the <b>Effort</b> tab.</p> <p>b. Enter in <b>Effort</b> in number of months</p> <p><b>NOTE:</b> <b>Effort</b> must be entered in either calendar months or a combination of academic and summer months.</p>	Add two calendar months for each personnel

	<b>NOTE:</b> If any measureable amount of contributed effort applies, contributed effort must also be completed in the <b>Budget Cost Share</b> .	
8.	Click the <b>Save and Continue</b> button to advance to the next screen. <b>NOTE:</b> <b>Save and Continue</b> button does not advance from <b>Unit Details</b> to <b>Effort</b> .	

### 2.4.1: F&A Allocation (UIC Only) and Credit Allocation (UIUC Only)

#### F&A Allocation (UIC Only)

Step	Task	Example
1.	Enter the <b>F&amp; A Percentage</b> for each unit. <b>NOTE:</b> <b>F&amp;A Percentage</b> must add up to 100.	Type in numbers so that it adds up to 100
2.	Click the <b>Save and Continue</b> button to advance to the next screen.	

#### Credit Allocation (UIUC Only)

For all proposals, Intellectual Credit will be allocated among the Principal Investigator and Co-Principal Investigators at the time of the proposal submission based on their agreed upon relative contributions to the overall sponsored project. The total credit allocation among all investigators cannot exceed 100%. Investigators may choose to distribute their portion of credit among multiple units. For example, an investigator on a large project managed by the Institute for Genomic Biology (IGB) may choose to split his/her 20% of assigned credit evenly between IGB and Crop Sciences.

Step	Task	Example
1.	Enter the <b>Intellectual Credit</b> for each investigator.	Type in amounts so that it adds up to 100.
2.	Click the <b>Refresh View</b> button to update the totals on the screen. <b>NOTE:</b> The total for all investigators must add up to 100. Separately, the total for all units under each investigator must also add up to 100. <b>NOTE:</b> If investigator has 0 intellectual credit, units may also equal 0.	
3.	Click the <b>Save and Continue</b> button to advance to the next screen.	

If you need to add an additional unit for intellectual credit, please go to **Personnel** and add the unit.

## 2.5: Adding Compliance, Abstracts, and Attachments

### 2.5.1: Compliance

Complete the **Compliance** tab if you have any of the following compliance considerations:

- Human Subjects
- Animal Subjects
- PHS Regulation on Conflict of Interest (FCOI)
- Hospital/Clinic/MRI Center (UIC Only)
- Biological Safety (including Select Agents and rDNA)

For more information on Human Subjects Research review the following websites:

- UIUC <https://oprs.research.illinois.edu/about-oprs-irb>
- UIC <http://research.uic.edu/compliance/irb>
- UIS <https://www.uis.edu/research/research-integrity/irb/>

Step	Task	Example
1.	Click the <b>Add Compliance Entry</b> button.	
2.	Select the compliance <b>Type</b> .	<b>Enter in Two Different Entries:</b> Human Subjects – Pending Animal Subjects - Pending
3.	Select the <b>Approval Status</b> . <b>UIC only NOTE:</b> For all New and Competitive Renewal Applications, Human and Animal status must be <i>Pending</i> .	See above
4.	If approved, enter applicable information including <b>Protocol Number, Application Date, Approval Date, Expiration Date, Exemption #</b> , and/or <b>Comments</b> (optional).	
5.	Click the <b>Add Entry</b> button.	
6.	Repeat the above steps to add more <b>Compliance</b> entries (optional).	
7.	Click the <b>Save and Continue</b> button to advance to the next screen.	

### 2.5.2: Adding Abstracts

An abstract is required with every *myProposals* submission. This field is intended to provide a general synopsis of the proposal from which research keywords can be collected to improve data collection and reporting that will in turn promote inter-disciplinary research.

Abstracts - The maximum number of **Abstracts** for a proposal is one.

Step	Task	Example
1.	Click the <b>Add Abstract</b> button.	

2.	Select an <b>Abstract Type</b> .	Project Summary
3.	Enter <b>Abstract Details</b> . <b>NOTE:</b> You can copy and paste <b>Abstract Details</b> from another document.	Type in anything.
4.	Click the <b>Add</b> button.	
5.	Click the <b>Save</b> button.	

### 2.5.3: Adding Attachments

Add attachments like the budget, budget justification, statement of work, sponsor guidelines in this section, or any other documentation you want included in the proposal.

Step	Task	Example
1.	Click the <b>Upload &amp; Add</b> button.	
2.	Locate and click on the attachment.	Locate a file and click on it.
3.	Click the <b>Open</b> button.	
4.	Select the <b>Type</b> .	
5.	Enter a <b>Description</b> (optional).	
6.	Click the <b>view/edit rights</b> button to modify access to the document for each person added to this proposal (optional). <b>NOTE:</b> By default, all persons added to the proposal have <b>Modify</b> access to attachments. <b>NOTE:</b> You can add more than one attachment at a time by holding down the <b>Ctrl</b> or <b>Shift</b> buttons.	
7.	Repeat these steps to add additional <b>Attachments</b> (optional).	
8.	Click the <b>Save and Continue</b> button to advance to the next screen.	

## 2.6: Budget, Cost Sharing, Approval, and Access

### 2.6.1: Budget & Cost Share

Step	Task	Example
1.	Click the <b>+Add Budget</b> button.	
2.	Enter the <b>Direct Cost</b> , and <b>F&amp;A Cost</b> for each <b>Budget Period</b> . <b>NOTE: Total Sponsor Cost</b> cannot be modified. <b>Total Sponsor Cost</b> will update automatically.	Direct Cost – \$100,000 for each year UIUC F&A Cost – \$58,600 for each year UIC F&A Cost – \$59,900 for each year UIS F&A Cost – \$38,600 for each year
3.	Click the <b>Period Start Date</b> or <b>Period End Date</b> to modify the <b>Budget Periods</b> (optional).	
4.	Click the <b>+Add Budget Period</b> to add additional budget periods (optional).	
5.	Click the <b>Save</b> button.	
6.	If your proposal does not commit cost share, skip to step 10. Otherwise, click on <b>Cost Sharing</b> .	
7.	Click the <b>+Add Cost Sharing</b> button (optional).	
8.	Enter the <b>Source Type</b> , <b>Amount</b> , and <b>Cost Share Type</b> . <b>NOTE: If Contributed Effort</b> is selected, complete <b>Unit Details</b> and <b>Contributed Effort Individual</b> . All values are converted into dollars. <b>NOTE: If Hard Match</b> is selected, complete <b>Unit Details</b> . <b>NOTE: If Third Party Entity</b> is selected, complete <b>Third Party Entity</b> information.	Hard Match – \$50,000 from your lead unit Mandatory Contributed Effort - \$15,000 for add NetID of the PI on your proposal Mandatory Third Party Entity - \$20,000 Microsoft Inc. Mandatory Cost Share - \$10,000 Mandatory
9.	Click the <b>Save</b> button. <b>NOTE: Total Cost Sharing</b> amount should reflect the sum of all proposed cost share commitments on the project.	
10.	Click the <b>Return to Proposal</b> button.	
11.	Click the <b>Save and Continue</b> button to advance to the next screen.	

### 2.6.2: Approval and Access

#### Approval

By default, **TBD** will be entered for the **Approval – Unit Head**. You must edit and enter a name for each **Unit Head**. To update:

Step	Task	Example
1.	For each Approver listed, click the <b>Edit</b> button under <b>Actions</b> .	
2.	Enter the <b>NetID</b> of the <b>Unit Head</b> .	Update these fields to the <b>NetID</b> of those sitting in front and in back of you.  OR UIUC use tamimie UIC use jrowan UIS use hvanl2
3.	Type in text in the <b>Reason</b> (if necessary).	
4.	Click the <b>Save</b> button.  <b>NOTE:</b> The Full Name will not update until you press the <b>Save, Save and Continue</b> button at the bottom of the screen, or press the <b>Tab</b> key.  <b>NOTE:</b> The <b>Unit Head</b> cannot be the same person as the proposal <b>Aggregator</b> or <b>PI</b> .	

**Add Approval** will add an additional approver to this proposal. You may need to add additional approval for a Unit Head or Unit Executive to a proposal.

Step	Task	Example
1.	Click the <b>Add Approval</b> button.	
2.	Enter the <b>UIN</b> or <b>Net ID</b> of the approver.	sireland
3.	Click the radio button to select the approver.	Select Sean Ireland
4.	Click the <b>Continue...</b> button.	
5.	Select the appropriate role.	Other – Document Level
6.	Click the <b>Add Permission</b> button.	
7.	Once the approver has been added, click the <b>Edit</b> button under <b>Actions</b> .	
8.	Enter a <b>Reason</b> for adding this approver to the proposal (optional).	
9.	Enter the <b>Unit</b> using Chart and three-digit org (Example: 1-101).	UIUC 1-101 UIC 2-100 UIS 4-100
10.	Click the <b>Save</b> button at the bottom of the screen.	
11.	Repeat these steps to add additional <b>Approvals</b> if necessary.	



**Add Access** will add additional users to this proposal. These additional users can have the roles of **Aggregator Document Level** (creator, editor, and delete access) or **Proposal Viewer Document Level** (only able to view the proposal).

Step	Task	Example
1.	Click the <b>Add Access</b> button.	
2.	Enter the <b>UIN</b> or <b>Net ID</b> of the approver.	Enter the <b>Net ID</b> of someone that needs to have access.  <b>NOTE:</b> Personnel in your department should already have access. You only need to add personnel from other departments that need access to this proposal or can submit on your behalf.
3.	Click the <b>Continue...</b> button.	
4.	Click the radio button to select the user.	
5.	Click the <b>Continue...</b> button.	
6.	Select the appropriate role.	Aggregator Document Level
7.	Click the <b>Add Permission</b> button.	
8.	Repeat these steps to grant additional access if necessary.	
9.	Click the <b>Save and Continue</b> button to advance to the next screen.	

Cost Share Approver Document Level & Contributed Effort Approver Document Level cannot be added on this screen. These are automatically added on the Cost Share screen.

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## 2.7: Supplemental Information & Notes

### Supplemental Information Tab

- The **Supplemental Info** tab consists of multiple subtabs.
- Please complete all fields in each subtab.
- The **Save and Continue** button will navigate to **Notes** and not to the next **Supplemental Info** subtab. You must click the next tab.

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### 2.7.1: Indirect Cost Rate

Step	Task	
1.	Type the applicable <b>Rate</b> .	UIUC type in 58.6% UIC type in 59.9% UIS type in 38.6%
2.	Select the cost rate basis.	MTDC
3.	Select the appropriate location.	On Campus

4.	Select the appropriate explanation.	Full Rate
5.	Type additional comments regarding project F&A.	
6.	Click the <b>Save</b> button.	

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### 2.7.2: Additional Compliance Attributes

Step	Task	Example
1.	Click the <b>Additional Compliance Attributes</b> tab.	
2.	Review the <b>Additional Compliance Attributes</b> .	
3.	In <b>Attributes Reviewed?</b> , select <b>Yes</b> to complete tab (required).	Yes
4.	Click <b>Yes</b> to the radio buttons if applicable and complete the descriptions if applicable.	
5.	Click the <b>Save</b> button.	

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### 2.7.3: Additional Project Approvals

Step	Task	
1.	Click the <b>Additional Project Approvals</b> tab.	
2.	Review the <b>Additional Project Approvals</b> .	
3.	In <b>Proj Characteristics Reviewed?</b> , select <b>Yes</b> to complete tab (required).	Yes
4.	Click <b>Yes</b> to the radio button if applicable.	Select Yes to <b>Cost Exception</b>
5.	Click the <b>Save and Continue</b> button to advance to the next screen.	

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### 2.7.4: Project Characteristics

Step	Task	
1.	Click the <b>Project Characteristics</b> tab.	
2.	Review the <b>Project Characteristics</b> .	
3.	In <b>Proj Characteristics Reviewed?</b> , select <b>Yes</b> to complete tab (required).	Yes
4.	Click <b>Yes</b> to the radio buttons if applicable.	
5.	Click the <b>Save</b> button.	

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### 2.7.5: Notes

Enter notes that you will send to either the **Department** or **Central Office** to review with the proposal. Notes cannot be deleted or edited. If you need to amend a note, add a new note.

Step	Task	
1.	Click the <b>+Add Note</b> button.	
2.	Select a Topic. <b>NOTE:</b> The Topic refers to who entered the <b>Note</b> . Department users should always select <b>Department</b> as the Topic.	
3.	Enter Text.	Type in... Please provide the approval letter which will be submitted to the sub.
4.	Click the <b>Add</b> button.	
5.	Repeat these steps to add additional Notes if necessary.	
6.	Click the <b>Save and Continue</b> button to advance to the next screen.	

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### 2.8: Summary/Submit

The **Summary/Submit** tab will include a recap of the entire proposal on subtabs. Please review each subtab for accuracy.

In rare circumstances, you can submit your proposals to the Central Office without all approvals. However, as a best practice, submit your proposal to the Central Office after all approvals have been received.

Step	Task	Example
1.	Once you have reviewed the entire proposal for accuracy and received all approvals, click the <b>Submit to Central Office</b> button.	Go ahead and submit your proposal. Data validation will turn on (if not already on), and you will need to fix any errors.

Once submitted to Central Office, the proposal is locked for editing.

## 2.9 Assessment Time

Create a new proposal using the following information:

Field	UIUC Example	UIC Example	UIS Example
Proposal Type	New	New	New
Lead Unit	choose your own	choose your own	choose your own
Activity Type	Research Basic	Research Basic	Research Basic
Project Dates	Oct 1 next year to Sep 30 of three years from now	Oct 1 of next year to Sep 30 of three years from now	Oct 1 of next year to Sep 30 of three years from now
Project Title	myProposals Testing #2	myProposals Testing #2	myProposals Testing #2
Sponsor	NIH	NIH	IDOT
Prime Sponsor	(none)	(none)	NSF
Submission By	Central Office	Central Office	Central Office
Submission Type	Electronic	Electronic	Electronic
Number of Copies	(none)	(none)	
Sponsor Mailing Address	NIH Assist	NIH Assist	IDOT Website
Sponsor deadline	Aug. 31 of next year	Aug. 31 of next year	Aug. 31 of next year
Sponsor Deadline time	5:00 PM	5:00 PM	5:00 PM
Sponsor Deadline Type	Hard	Hard	Hard
Notice of Opportunity	Federal Grant Solicitation	Federal Grant Solicitation	Non-Federal Solicitation
Opportunity ID	PA-18-484	PA-18-484	
Temporary Application ID	(none)	(none)	
Sponsor Proposal ID	0012456	0012456	
Add Personnel - PI	Add the person to your left or use tamimic	Add the person to your left or use jacquieb	Add the person to your left or use kdung1

Field	UIUC Example	UIC Example	UIS Example
Add Personnel - Co-I	Add the person to your right	(none)	(none)
Add Co-PI	(none)	(none)	(none)
Key Person	(UIC Only)	Add the person to your right	(none)
Effort	0.5 summer month for each person	0.5 summer month for each person	0.5 summer month for each person
F&A Percentage	(none)	add up to 100	(none)
Intellectual Credit	add up to 100	(none)	(none)
Add Compliance Entry Type	(none)	(none)	(none)
Abstract Type	Project Summary	Project Summary	Project Summary
Abstract Details	Type in anything	Type in anything	Type in anything
Upload & Add	No attachments	No attachments	No attachments
Direct Cost	100,000 for each year	100,000 for each year	100,000 for each year
F&A Cost	58,600 for each year	59,900 for each year	38,600
Cost Share	No cost share	No cost share	No cost share
Approvals Person TBD	Update those fields to the NetID of the people in front or in back of you or use ywsong	Update those fields to the NetID of the people in front or in back of you or use ywsong	Update those fields to the NetID of the people in front or in back of you or use ywsong
F&A Cost Rate	58.60%	59.90%	38.6%
F&A Basis	MTDC	MTDC	MTDC
F&A Location	On Campus	On Campus	On Campus
F&A Explanation	Full Rate	Full Rate	Full Rate
Project Characteristics	(none)	(none)	(none)
Additional Project Approvals	(none)	(none)	(none)
Notes	(none)	(none)	(none)
Data Validation	Turn on and check for errors	Turn on and check for errors	Turn on and check for errors

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## Lesson 3: Approving/Disapproving Proposals

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### 3.1: Sending Notifications to Project Personnel

After a proposal is created in *myProposals*, notifications must be sent from *myResearch Portal* to obtain certification/approvals.

Please obtain the non-production *myResearch Portal* link from your instructor. Use this link <http://go.uillinois.edu/2>

Step	Task
1.	Log in to <i>myResearch Portal</i> . <b>NOTE:</b> Click the <b>View in myResearch Portal</b> link in <i>myProposals</i> to skip steps 1 – 3.
2.	Click on <b>Proposal Transmittal</b> .
3.	Click on the <b>Title</b> of the proposal.
4.	Check the <b>Notify</b> box of the corresponding personnel to notify. <b>NOTE:</b> Check the <b>Notify</b> box at the top, and all <b>Notify</b> boxes will be selected.
5.	Click the <b>Notify selected</b> button.
	<b>NOTE:</b> The date and time of notification is recorded under <b>Notified</b> . <b>NOTE:</b> Certification/Approvals are also recorded on this screen. Repeat these steps to notify personnel again.

### 3.2: Email Example Sent to Project Personnel

We are using a non-production environment, emails and notifications will not be sent. Here is an example of the email generated.

Dear APPROVER,

BUSINESS MANAGER has submitted a certification request via the myResearch Portal for TITLE OF PROPOSAL.

Your role on the project: APPROVER

Proposal Title: TITLE OF PROPOSAL

Proposal Transmittal Number: 223

Lead Unit: Beckman Institute-U (1-392000)

Sponsor: US Dept of Defense (Natl Security Agency) Deadline Date/Time: 05/22/2018/5:00 PM  
Deadline Type: Hard

**To approve/certify this proposal, please visit**  
**<https://urbasdev2.admin.uillinois.edu/piPortal/proposal-summary/494931>.**

If you believe you have received this message in error, please contact the central office for your campus:  
[spapreaward@uillinois.edu](mailto:spapreaward@uillinois.edu)

### 3.3: Approving, Certifying, and Disapproving Proposals

There are two distinct ways project personnel can approve/certify/disapprove a proposal.

#### 3.3.1: Approving/Certifying/Disapproving from the Notification Email

Because emails are not being sent out, here are the steps for future reference.

Step	Task
1.	Locate the <b>Notification Email</b> in your Inbox.
2.	Click the link to approve/certify the proposal.
3.	Enter your <b>NetID</b> and password.
4.	Click the <b>Log In</b> button.
5.	Review the proposal details.
6.	Click on the <b>Approve/Certify</b> or <b>Disapprove</b> button.
7.	When approving/certifying, please review the Approve/Certify screen policies, and click the <b>Approve</b> button for Deans/Department Heads OR <b>Certify</b> for Researchers/PI/Faculty.

	<b>OR</b> When disproving, please review the <b>Disapprove Proposal</b> screen policies, type in a comment ( <b>required</b> ), and click the <b>Disapprove</b> button.
	<b>NOTE:</b> If you navigate away from this proposal, click <b>Pending Actions</b> to return to your Inbox.

### 3.3.2: Approving/Certifying/Disapproving from *myResearch Portal*

Step	Task
1.	Navigate to <i>myResearch Portal</i> .
2.	Enter your <b>NetID</b> and password.
3.	Click the <b>Log In</b> button.
4.	Click on the title of the proposal to approve/disapprove from the Inbox. <b>NOTE:</b> If the Inbox does not appear, you do not have anything to approve/disapprove.
5.	Review the proposal details.
6.	Click on the <b>Approve/Certify</b> or <b>Disapprove</b> button.
7.	When approving/certifying, please review the Approve/Certify screen policies, and click the <b>Approve</b> button for Deans/Department Heads OR <b>Certify</b> for Researchers/PI/Faculty. <b>OR</b> When disproving, please review the <b>Disapprove Proposal</b> screen policies, type in a comment ( <b>required</b> ), and click the <b>Disapprove</b> button.
	<b>NOTE:</b> If you navigate away from this proposal, click <b>Pending Actions</b> to return to your Inbox.

### 3.4: Checking the Status of Approvals

To check the status of approvals on proposals,

Step	Task
1.	Log in to <i>myResearch Portal</i> .
2.	Enter your <b>NetID</b> and password.
3.	Click the <b>Log In</b> button.
4.	Click on the <b>Proposal Transmittal</b> .
5.	The approval count will show up in the last column. Click the title of the proposal to review each approval.
6.	Check the <b>Notify</b> box and notify personnel again (optional).
7.	Once all approvals have been recorded, return to <i>myProposals</i> and submit the proposal to the <b>Central Office</b> .



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## Lesson 4: myResearch Portal Overview

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### 4.1: Dashboard

The Dashboard consists of buttons. Here are definitions for each button (you may not see them all depending on your role and access).

- Pending Actions – Primarily for Approvers, will only show if you have Pending Actions from *myProposals* including PI/Faculty/Deans/Department Heads.
- Proposal Transmittal – Primarily for Business Managers, will only show if you have proposals that need action from *myProposals*.
- Pending Reviews – Central Office use only.
- Portfolio – Shows proposals where PI/Faculty/Researchers are listed as personnel.
- Units & Investigators – View all documents where Business Managers have unit access.
- Forms and Submissions – Various links to other sponsor research tools.
- Search – Search all documents based on various criteria

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## Course Summary

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### Course Objectives

Now that you have completed this course, you are able to:

- Create and Submit a Sponsored Research Proposal
- Notify Approvers to Approve a Proposal
- Locate Contact and Training Information

## Appendix A: Approving/Certifying/Disapproving Proposals

### Approving/Certifying/Disapproving from the Notification Email

Step	Task
1.	Locate the <b>Notification Email</b> in your Inbox.
2.	Click the link to approve/certify the proposal.
3.	Enter your <b>NetID</b> and password.
4.	Click the <b>Log In</b> button.
5.	Review the proposal details.
6.	Click on the <b>Approve/Certify</b> or <b>Disapprove</b> button.
7.	When approving/certifying, please review the Approve/Certify screen policies, and click the <b>Approve</b> button for Deans/Department Heads OR <b>Certify</b> for Researchers/PI/Faculty.  <b>OR</b> When disproving, please review the <b>Disapprove Proposal</b> screen policies, type in a comment ( <b>required</b> ), and click the <b>Disapprove</b> button.
	<b>NOTE:</b> If you navigate away from this proposal, click <b>Pending Actions</b> to return to your Inbox.

### Approving/Certifying/Disapproving from *myResearch Portal*

Step	Task
1.	Navigate to <i>myResearch Portal</i> .
2.	Enter your <b>NetID</b> and password.
3.	Click the <b>Log In</b> button.
4.	Click on the title of the proposal to approve/disapprove from the Inbox. <b>NOTE:</b> If the Inbox does not appear, you do not have anything to approve/disapprove.
5.	Review the proposal details.
6.	Click on the <b>Approve/Certify</b> or <b>Disapprove</b> button.
7.	When approving/certifying, please review the Approve/Certify screen policies, and click the <b>Approve</b> button for Deans/Department Heads OR <b>Certify</b> for Researchers/PI/Faculty.  <b>OR</b> When disproving, please review the <b>Disapprove Proposal</b> screen policies, type in a comment ( <b>required</b> ), and click the <b>Disapprove</b> button.
	<b>NOTE:</b> If you navigate away from this proposal, click <b>Pending Actions</b> to return to your Inbox.



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## Appendix B: START myResearch Training Evaluation

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Today's Date: \_\_\_\_\_ Circle One: **UIC** **UIUC** **UIS**

Training Session Circle One: **Aggregator Training** **Approver Training** **Other** \_\_\_\_\_

For each statement below, place an "X" in the appropriate box.

	Strongly Agree	Agree	Do Not Agree	Strongly Disagree	No Opinion
The facilitator communicated clearly.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The facilitator was effective.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents provided are useful.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Course length was appropriate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Please comment on the following questions.</b>					
List one issue, situation or problem in your work environment that you will be able to address or solve with this new software.					
Do you have additional comments or suggestions?					
What department do you work in?					

Your Name (optional) \_\_\_\_\_

**Please return completed forms to your presenter.**