OERA
Proposal Request
User’s Manual
(The exciting new web-based replacement to the PIF)

OERA
December 2017
1.0 GETTING STARTED
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1.1 Logging On

Step 1: Go to: https://apps.engr.psu.edu/PropTrack/Create/Default.aspx

A user ID and password is required to log onto the web interface, please login the same way you login to your Web Access account.

Figure 1

Figure 2
1.2 Account troubleshooting

Who can I contact for assistance?
If you’re a user and experiencing problems with authentication, then please contact the ITS Service Desk staff at helpdesk@psu.edu. In the body of your e-mail message, include the following:

- Penn State Access Account user ID (for example, xyz5000);
- Time the error occurred;
- Error message(s) received, if any;
- Web browser used and version (for example, Mozilla Firefox 34 or Internet Explorer 11); and,
- Platform and operating system (for example, Macintosh OS 10.6 or Windows 7).

1.3 Exit System

Click on [Log Out] in the upper right hand corner.
2 USING THE SYSTEM
**Step 1:** Type in your proposal title, if this is tentative, please add this in parenthesis at the end. Investigating the flux capacitor and it's effects on the Space-time Continuum (Tentative)
Step 2: Enter the solicitation number and the URL. If this is an industry proposal, please attach any documents that may pertain to the proposal such as indirect rates or other fiscal/administrative requirements. It is fine if you do not have this information.

Step 3: Select the submission type:

Step 4: If this is a continuation, renewal or resubmission please provide one of these numbers. If this is a new proposal that was previously canceled and there is an existing budget, please reference this number. If you created your own SIMs budget or if your department admin created your budget, please provide the SIMs budget #.

OSP#: This is the IAF-Internal Approval Form, example: 180634
SIMS budget #: This is a 5 digit unit budget ID, example: 47386
Award #: This is the sponsor reverence number.

Step 5: When you start typing the sponsors name a search list will generate, please select the appropriate sponsor from the drop down menu. Please also indicate what type of sponsor this is Federal, Foundation, Other, etc)
**Step 6:** If PSU is not the prime, please indicate the Prime Sponsor, this search box will appear when the “Has a prime sponsor” box has been checked.

**Principal Investigator:** *Brown, Emmett*

**Step 7:** Type in the last + first name of the Principal Investigator (PI). Remember to select the appropriate name from the generated list.

**Step 8:** Enter the period of performance and deadline.

**Step 9:** Enter the submitting Unit and (Administering Unit if this is different from the Submitting Unit).

**Step 10:** Click save & proceed to section 2.

Hurray! You completed section 1, now please proceed to section 2.
Section 2- Personnel

Step 1: The PI’s name will auto populate. Please explain how much effort you are requesting for the PI and if this is in summer months or academic months or over the calendar year. Once you are done entering the required information, click “Add Category 1 Personnel” to save your entry.
**Step 2:** Add other key personnel manually and indicate their role and effort. Please explain how much effort you are requesting for the PI and if this is in summer months or academic months or over the calendar year. Once you are done entering the required information, click “Add Category I Personnel” to save your entry.

**Step 3:** Add graduate students, if you have more than one graduate student, you may add them in the same explanation box. If you know the names, please check Named Graduate Assistant box and type in the names.
**Step 4:** Add wage payroll and/or Post-Docs, please provide rates.

**For Wage payroll:** Please provide the hourly rate, # of hours the individual will work per week and the number of weeks.

**For the Post-doc:** Please indicate the percent of effort. Please note if a yearly salary is not provided, the coordinator will use the approved minimum salary amount.

**Step 5:** If you have external collaborators or consultants, please check yes and provide details. (E.g. name of individual, affiliation, etc.)
If they will be funded, please check the funded box.
Step 6: Click on the continue button.
Section 3- Subcontracts

**Step 1:** If you have subcontracts, please fill out the required fields *Organization and the PI at the organization. If possible, please provide the Authorized Organization Representative, this will help the coordinator get the ball rolling with contacting the subcontract AOR for required documents/ due dates.

If you do not anticipate having any subcontracts on your proposal please skip this question.
(If you have collaborators or consultants please return to section 2 and complete the External Collaborators section.)

**Step 2:**

Continue to Section 4
Section 4 - Cost Share

* Denotes a required field

Section 4 - Cost Share

What type of Cost Share will there be? (Check all that apply.)

- □ Mandatory Cost Share - Required by the sponsor, specified by the agency in the program announcement or solicitation.
- □ Voluntary Committed Cost Share - Not expected by the sponsor but stated in the proposal and tracked and reported to the sponsor - as part of the total project costs.
- □ Voluntary Uncommitted Cost Share - Not expected by the sponsor, not mentioned in the proposal - not reported to the sponsor, tracked only internally by PSU.
- □ Voluntary Uncommitted Effort - A faculty member is not claiming effort on the prime award thus must show their effort as cost share.
- □ Unknown - The cost share type(s) are not known at the time of submitting.

[Return to Section 3]  [Continue to Section 5]

**Step 1:** If there is cost share, please select what type, if not, please proceed to section 5.

**Step 2:** Click on the continue button.

[Continue to Section 5]
**Section 5- Budget Line Items**

**Step 1:** Please add the other individual expenses such as travel, purchased services, software or licenses, computers, equipment and other. Please provide enough information that will help the coordinators create an accurate draft SIMs budget. Once you have typed in the information for that expense, click “Add Misc Budget Line Item” and your entry will be saved.

Please don’t forget to include your robots or other equipment that will need to be budgeted for!

**Step 2:** Click on the continue button.
Section 6-Review and Submit

Carefully review your proposal information and make any necessary corrections.

**OOPS did you make a mistake or is something missing?**

**Steps:** If something is not correct or if you need to make any changes, click on the section you need to edit. Once you correct this, re-select section 6 and click the submit button at the bottom of the page referenced in the above step.

Once complete, go ahead and click the submit button!
Good News! You have submitted your proposal request to OERA!
What happens next?

You will receive a confirmation email:

Thank you. We have received your request. Please click on the following link To:
Review the Process Timeline
Review your Submitted Request

<table>
<thead>
<tr>
<th>Your Processing Timeline</th>
<th>Due to Pre-Award</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Initial Notification/Initial Budget</td>
<td>11/22/2017</td>
</tr>
<tr>
<td>2. Final Budget/Budget Justification</td>
<td>12/7/2017</td>
</tr>
<tr>
<td>3. Final Documents – Ready for Submission to Sponsor</td>
<td>12/11/2017</td>
</tr>
</tbody>
</table>

Past Due

The above timeline is for your reference. During major and heavy deadline periods, additional processing time will be required. These internal deadlines will be clearly communicated to you by the assigned coordinator. More Info...

Thanks,
OERA Team
Office of Engineering Research Administration
OERAProposals@engr.psu.edu; 814-865-6185

Please let our team know if you do not receive a confirmation email and contact us at OERAProposals@engr.psu.edu.

The proposal will be assigned to a coordinator as soon as possible and they will email you a checklist and draft budget for your upcoming proposal.

To review your submitted proposal or proposals in progress please refer to section 3 on the next page.
3 Navigating your Proposal Requests
3. Navigating your Proposal Requests

When you click “My Proposals” you will see the following:

**Draft Proposals** - These are the proposals that have not been submitted to OERA yet. You may edit these at any time and delete them by clicking the X button on the far right.

**Pending Proposals** - Pending proposals are the proposals that you have submitted to OERA. You cannot delete these and you will need to submit a request to OERA to delete these or to make any changes.