**Quick Reference Guide**

**Request for New Application/Proposal/Project**

**Information you need before you start . . .**

- Requests for new Application/Proposal/Project are now completed exclusively through the [Researcher Home Page](http://www.rso.ualberta.ca/). As of August 31, 2016, the Request for New Research Project paper request form is no longer available.

- The Request for New Research Project form is not required for a Notice of Award to a previously submitted and RSO-reviewed formal application. Contact your Research Facilitator for further instruction.

- Approved or renewed ethics and biohazards (if applicable) must be in place before preparing this request; for more information review the RSO Ethics Certification.

- The Eligibility to Apply for and Hold Research Funding Procedure and corresponding Policy have been reviewed to define the roles and responsibilities for research administration: “The Project Holder is the individual who is deemed accountable for the appropriate expenditure of the revenue placed in a Project, in compliance with the terms and conditions of the sponsor(s), and with University policies and procedures.”

**Detailed instructions**

1. Login to your Researcher Home Page and click “Create Application/Proposal/Project”.

2. On the Create Proposal screen, click “Add”.

3. **Description** (Project Title): Enter your proposal or project title.

4. **Request type**: Select appropriate request type from the drop-down menu.

5. **Principal Investigator (PI)**: Name of PI at the UofA, or supervisor if the proposal is a student award. The UofA Employee IDs or the lookup field can be used to select.

6. **Is PI the Project Holder**: Select yes or no.

7. **Project Holder ID**: Defaults to PI if yes selected in #6 above. The Chair or Dean goes here if the PI is ineligible to hold or the Project is a salary or stipend/award.

8. **Department**: Autocompletes based on the project holder information entered in #7 above.

9. **Start date**: Enter your proposal or notice of award start date (if known).

10. **End Dates**: Enter your proposal or notice of award end date (if known).

11. **Indirect Cost Requested**: Select yes or no to indicate whether or not you have requested indirect costs in your budget. For details on indirect costs, please refer to the UofA’s Application for indirect costs recovery rates procedure. If “no” is indicated, you must include a rationale in the box that appears. For additional details on indirect costs, contact your Faculty Research Facilitator.

12. **Source of funds**: Select Internal, External or Both.

13. For each source of funds, add a sponsor contact name and phone number (if known) and indicate total Award Amount.

14. Select appropriate currency if other than Canadian dollar.

15. **Certification Info**: Indicate yes or no for each category (Animal Welfare, Human ethics, Biohazards and Stem Cells) to confirm the Ethics Certification requirements for each category.

16. **Keywords**: This section is NOT required.

17. **Additional University Resources**: You must indicate yes or no for each category.

18. **Honorarium or salary for the PI**: You must indicate yes or no.

19. **Does this research involve Aboriginal/Indigenous peoples, their communities or knowledge systems?** You must indicate yes or no.

**UofA Co-Investigators/students**

20. **UofA Co-Investigators**: Search for and add UofA Co-Investigators to the signature page using magnifying glass icon. If there are two individuals with the same name, the PI must check with the Co-Investigator to confirm the correct one is added. Use the “×” icon to add lines if needed. The system will generate a signature page with a space for each UofA Co-Investigator listed. Non-UofA Co-Investigators should not be added in this section.

21. **Intellectual Credit**: This section is NOT required by RSO.

22. **Studentship Requests**: Add the UofA ID of the student applying for the award. If student does not yet have a UofA ID, the student row must be deleted. Do this by selecting the minus (-) sign. The form will still print with a space for the student to sign. If there are two students with the same name, the PI must check with the student to confirm the correct one. When done entering information, click Save.

23. Click Save.

24. Click Submit.

25. Click Print, sign and circulate for required signatures. All UofA Co-Applicants must sign the signature page.

**Requirements for Project Setup:**

- RSO Ethics Certifications

- Notice of Award (Sponsor letter, Notice of Decision, etc.)

- Scope of Work

- Budget + Indirect Costs

- Signatures
Today's Research, Our Future at Upcoming Research Administration Day (RAD)

Mark your calendars for our upcoming Research Administration Day (RAD) on May 31, 2017. Whether you are new to research administration or you want to learn more, come to RAD. Past topics included challenges of multi-sponsor partnership projects and unboxing research finance.

This year’s theme is Today's Research, Our Future and will align with University of Alberta’s strategic plan, For the Public Good.

Date: Wednesday, May 31, 2017
Time: 8 a.m. - 12 p.m.
Location: L1-490, L1-420, & L1- 430, Edmonton Clinic Health Academy (ECHA)

Creating a New Proposal?

Warning! Please ensure you have selected the ID of the Department/Faculty where the activity will take place and that will manage the funds, rather than 'ALL DEP'. If 'ALL DEP' is chosen, RSO will not be able to process your request.

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Self-Service Center

- **General Inquiry**
  - Inquire on general self-service activities.
  - SpeedCode Inquiry*
  - PER Balance Inquiry*
  - Researcher Home Page*
  - eTRAC*

- **Travel and Expenses**
  - Create an expense reimbursement, travel or PER claim.
  - Create Expense Report
  - Modify Expense Report
  - View Expense Report
  - Travel and Expense Center

- **Manage Approvals**
  - Approve transactions for processing.
  - Approve T&E Transactions

- **Procurement**
  - Create requisitions and view procurement activity and status.
  - Manage Requisitions
  - PO Inquiry
  - Voucher Inquiry

- **External Links**
  - Access other key resources.
  - UAPPOL*
  - Research Ethics (REMO)*

- **Training Resources**
  - Access learning resources.
  - Financials Online Training
  - Quick References*
Request for New Application/Proposal/Project

1. Create Application/Proposal/Project

2. Add Business Unit: JOFAB
   Proposal ID: NEXT

Find an Existing Value | Add a New Value

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For studentship requests, UofA Co-Investigator(s) section will be replaced by this: