

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](#). 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 Certifications](#).
- 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 Certifications](#) 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

Research Services Office (RSO) Links

RSO Website:

<http://www.rso.ualberta.ca/>

Award Set Up

Home > Managing Research Funding > Award Set Up

Research Facilitators (RFs)

Home > Contact RSO > Research Facilitators

Researcher Home Page

Home > Researcher Home Page

Login to Researcher Home Page:

<https://www.prodps.ualberta.ca/psp/finprd/?cmd=login>

www.rso.ualberta.ca



My UAlberta | Find a Person | ONECard | Bear Tracks | Maps | Email & Apps | eClass | Libraries

Search

Research Services Office

Forms Cabinet | [Log In To Researcher Home Page and eTRAC](#)

- About RSO
- Funding Opportunities
- Researcher Home Page
- Overview of New Research Proposal Lifecycle
- Applying for Funding
- Managing Research Funding
- Negotiating Sponsored Research Agreements
- Research Policies and Procedures
- Forms Cabinet
- Contact RSO
- Workshops, Events and Seminars
- RSO Staff Intranet



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.

Project Terms of Reference

- [Terms of Reference for NSERC SSHRC General Research Fund](#)

Quick Reference Guides

- [Ethics Certifications](#)
- **NEW** [Request for New Application/Proposal/Project](#)
- [Requirements When Submitting a Request to the RSO](#)

[Ethics Certification Webpage](#) (RSO) [Grant Assist Program](#) Office of the Vice-President (Research)

Funding Opportunities

Check out our main [Funding Opportunities](#) page for a detailed listing of national funding and training opportunities.



[Click here for the printable RSO directory](#)

UNIVERSITY OF ALBERTA

Favorites Main Menu

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*](#)



Favorites | Main Menu > Employee Self-Service > Projects > Researcher Home Page*

Researcher Home Page

User ID: DERY



Name: Rene Dery

[Create Application/Proposal/Project](#)

Advanced Project Search

Project Holder <input type="text"/>	Holder Role <input type="text"/>	Project <input type="text"/>	Lookup Project by Speedcode
Project Status <input type="text"/>	<input checked="" type="checkbox"/> Active <input type="checkbox"/> Inactive	Department <input type="text"/>	
Project Description <input type="text"/>		Faculty <input type="text"/>	
Project Title <input type="text"/>		OE Projects Only: <input type="checkbox"/>	
Start Date From <input type="text"/>	To <input type="text"/>	Team Member <input type="text"/>	
End Date From <input type="text"/>	To <input type="text"/>	Sponsor <input type="text"/>	Program <input type="text"/>
			<input type="button" value="Search"/> <input type="button" value="Clear"/>



Favorites | Main Menu > Employee Self-Service > Projects > Researcher Home Page* > Create Proposal*

Create Proposal*

Business Unit: JOFAB

Proposal ID: NEXT

2



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

Request for New Application/Proposal/Project



Favorites | Main Menu > Employee Self-Service > Projects > Researcher Home Page* > Create Proposal*

PI Section

Proposal ID: NEXT

Version ID:

Request Status:

Description(Project Title): Contact for Pickup:

*Request Type:

*Principal Investigator (PI):

Is PI the Project Holder: Yes No

Project Holder ID:

*Department:

Faculty:

Start Date:

End Date:

Source of Funds:

Indirect Cost Requested: Yes No

External						Personalize	Find	View All	🔗	First	1 of 1	Last
Sponsor	Program	Sponsor Contact Name	Phone No	Amount								
1	<input type="text" value="13"/>			0.00								

Internal Sponsor						Personalize	Find	View All	🔗	First	1 of 1	Last
Sponsor	Program	Program Name	Contact Name	Phone No	Amount							
1	INTERNAL	<input type="text"/>			0.00							

Internal Funding Source								Personalize	Find	View All	🔗	First	1 of 1	Last	
SpeedChart Key	Fund	Department	Program	Class	Project	Sponsor									
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>									

Total Award Requested: \$0.00 Award Currency:

Certification Info				Personalize	Find	View All	🔗	First	1-4 of 4	Last
Certification Code	Required	Assurance Number								
1 Animal Welfare 01	<input type="text" value="15"/>	AUP	<input type="text"/>							
2 Human Ethics 01		PRO	<input type="text"/>							
3 Biohazards			<input type="text"/>							
4 Stem Cell			<input type="text"/>							

Key Word Detail			Personalize	Find	View All	🔗	First	1 of 1	Last
*Key Word	Description								
1 <input type="text" value="16 (Not required)"/>									

Request for New Application/Proposal/Project

Additional University Resources

Space (Additional or Modifications): Yes No

Technical Support: Yes No

Student Funding: Yes No

Teaching Relief/ Release: Yes No

Faculty/ Department letter or e-mail confirming support is attached: Yes No **17**

Other (describe): Yes No

Are matching/partner funds in place or intended to be obtained for this project: Yes No

Comments:

Project Includes honorarium or salary for the Principal Investigator: Yes No **18**

Does this research involve Aboriginal/Indigenous peoples, their communities or knowledge systems? Yes No **19**

Add lines ↓

UofA Co-Investigator(s)								
Resource	Employee ID	Name	Department	Description	Faculty	Description	Intellectual Credit (%)	
1 PI	0894763	Bitb,Piqi	610107	VPR Research Services (FICR)	610000	VPR VP Research	21 100.00	+ -
2 Co-PI							Not required	+ -
3 Co-PI							0.00	+ -

20 (see #22 below for studentships)

Attachment

Attached File	Attachment Date	Add
1		+ -

Save **23** Submit **24** Print **25**

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

Studentship								
Resource	Employee ID	Name	Department	Description	Faculty	Description	Intellectual Credit (%)	
1 SI	0894763	Bitb,Piqi	610107	VPR Research Services (FICR)	610000	VPR VP Research	0.00	+ -
2 STDNT		22					100.00	+ -

Attachment

Attached File	Attachment Date	Add
1		+ -

Save Submit Print