



Researcher Home Page Log-in (PeopleSoft):

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

Research Services Office (RSO) Links

RSO Website:

www.ualberta.ca/research/services/

Develop & Submit Proposal

Home > Develop & Submit Proposal

Certifications

Home > Receive & Manage Funding >
Activate Project Account > Certifications

Research Facilitators

Home > About > Contact Us > Research
Facilitators by Faculty

Researcher Home Page

Home > About > Resources >
Researcher Home Page

UAPPOL Procedures

- ✓ Application for Indirect Costs
Recovery Rates Procedure
- ✓ Eligibility to Apply for and Hold
Research Funding Policy
- ✓ Eligibility to Apply for and Hold
Research Funding Procedure

RSO Quick Reference Guide

Request for New Application/Proposal/Project

Requests are created through the [Researcher Home Page](#) as before, but once submitted, get routed electronically to department and faculty for online approvals. Please note:

- A new *Request* is not required for a Notice of Award to a previously submitted and RSO-reviewed [application](#).
- Applicable [certifications or renewals](#) must be in place for project funds to become available.
- The [Eligibility to Apply for and Hold Research Funding Policy](#) defines who is eligible to apply for research funding and hold research projects at the University of Alberta. This Policy should be reviewed prior to proceeding.

Detailed instructions (see annotated screenshots below)

1. To create a proposal request for online approvals, login to your [Researcher Home Page](#) through the RSO website and click "**Create Application/Proposal/Project**".
2. On the Create Proposal screen, click "**Add**".
3. **Description (Project Title)**: Enter your proposal title.
4. **Request type**: Select appropriate request type from the drop-down menu. For new applications, select "Application/Proposal – New". For a letter of intent, "Application/Proposal – LOI". For studentship stipend or post-doctoral fellowship applications, select "Studentship". If request type is "studentship", online approvals will not be required from the student or post-doc.
5. **Principal Investigator (PI)**: Auto-populates if PIs is submitter. If submitter is not the PI, enter UofA employee ID for the PI or Supervising Investigator (SI) (for studentship). The magnifying glass can be used to search by name. Ensure you enter the correct employee ID if searching by name and there is more than one person with the same name.
6. **Is PI the Project Holder**: Select **yes** or **no**. The Chair or Dean is the project holder if the PI is [ineligible](#) to hold or the request type is "Studentship" (see #4).
7. **Project Holder ID**: Defaults to PI if **yes** selected in #6 above. If **no** is selected, enter the employee ID of the project holder. Use the magnifying glass to search by name.
8. **Department**: Auto-populates based on the project holder entered in #7. Online approval routing will go through the selected department and faculty.
9. **Sponsor Deadline**: Please enter the sponsor deadline. If there is no formal deadline please enter a date **5 business days** from the current date.
10. **Start date**: Enter your proposal or notice of award start date (if known).
11. **End Dates**: Enter your proposal or notice of award end date (if known).
12. **Indirect Cost Requested**: You must include indirect costs in your budget in accordance with the UofA's [indirect costs procedure](#). If "**no**" is selected, you must include a rationale in the box that appears.
13. **Source of Funds**: Select **Internal**, **External** or **Both**. For external and internal sponsor, indicate total amount of funds coming to the UofA. You can also add the name and phone number of a contact person at the sponsor if known.
14. **Internal funding source**: This can be left blank if unknown. Can be edited by department and faculty reviewers/approvers.
15. **Currency**: Select appropriate currency if other than Canadian dollars.
16. **Certification Info**: Indicate **yes** or **no** for each category (Animal welfare, Human ethics, Biohazards and Stem Cells).
17. **Key Word Detail**: This section is not required.
18. **Additional University Resources**: Identify any additional resources being committed by the University as part of this application over and above the funds being requested from the sponsor (e.g., a teaching assistantship, additional lab space etc.). You must indicate **yes** or **no** in each category. Attach any supporting documentation (see #22).
19. **Honorarium or salary for the PI**: You must indicate **yes** or **no**.
20. **Does this research involve Aboriginal/Indigenous peoples, their communities or knowledge systems?** You must indicate **yes** or **no**.
21. **UofA Co-Investigator(s)**: The first line defaults to the PI as entered in step 5. Use the "+" icon to add an additional line for each [UofA](#) Co-Investigator. You can use the magnifying glass to search by name. Ensure you enter the correct employee ID if there is more than one person with the same name. **All UofA Co-Investigator(s) must be added to the proposal request.** Do not add **Non-UofA** Co-Investigators. Intellectual credit is not a required field.
22. **Attachments**: Click on the paperclip to upload attachments. Your proposal request supporting documents (complete application/scope of work, letters or support, budgets, notice of award etc.) must be attached for approvers to see and approve. The PI will be able to upload documents at their approval stage if PI is not the submitter.
23. **Save**: The request form can be **saved** and returned to at any point in the steps outlined above. To return to the proposal, simply log in to your researcher home page and search in the proposals section then click on the proposal number. Please do not create duplicate requests, contact your research facilitator for assistance.
24. **Submit**: Once you click submit, your request will now be submitted into workflow for online approval.
25. **NOTE**: You no longer need to print the form and obtain physical signatures. The print button is still available but no longer needs to be used.
26. The workflow approval chain is displayed on the bottom of the request page can be tracked along the different levels of approval.

**ONLINE APPROVALS
COMING
MID-JUNE.**

**When this change happens, you won't need to
print forms and obtain physical signatures.**

Tri-Agency Financial Administration Guide Renewal

The U of A is one of the universities selected to pilot the renewal of the Tri-Agency Financial Administration Guide. Check here for more information on the pilot project and to provide feedback.

Research Services Office News

SSHRC Partnership Grants Program Support Sessions

Our next session is about EDI & Intersectionality and is on June 13. Please RSVP for this session.

Research Administration Process



Find what step of our Research Administration Process your research project is in.

[Login to Researcher Home Page](#)

[Tableau Reports](#)



[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*](#)

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"/>

Create Proposal*

Business Unit: JOFAB

Proposal ID: NEXT

[Find an Existing Value](#) |

PI Section

Proposal ID: NEXT

Version ID: V0

Request Status:

Description(Project Title): Contact for Pickup:

*Request Type:

*Principal Investigator (PI): Meym,Hiyymuix

Is PI the Project Holder Yes No

Project Holder ID: Meym,Hiyymuix

*Department: VP Research Faculty: 610000 VPR VP Research

Sponsor Deadline: Unless otherwise specified, RSO has an internal deadline of 5 business days in advance of the sponsor deadline

Start Date:

End Date: Indirect Cost Requested Yes No

Source of Funds:

External				
Sponsor	Program	Sponsor Contact Name	Phone No	Amount
13				0.00

Internal Sponsor					
Sponsor	*Program	Program Name	Contact Name	Phone No	Amount
INTERNAL 13					0.00

Internal Funding Source						
SpeedChart Key	Fund	Department	Program	Class	Project	Sponsor
14						

Total Award Requested: \$0.00 Award Currency:

Certification Info			
Certification Code	Required	Assurance Number	
1 Animal Welfare 01	<input type="text" value="16"/>	AUP	<input type="button" value="+"/> <input type="button" value="-"/>
2 Human Ethics 01	<input type="text" value="16"/>	PRO	<input type="button" value="+"/> <input type="button" value="-"/>
3 Biohazards	<input type="text" value="16"/>		<input type="button" value="+"/> <input type="button" value="-"/>
4 Stem Cell	<input type="text" value="16"/>		<input type="button" value="+"/> <input type="button" value="-"/>

Key Word Detail		
*Key Word	Description	
17 (Not required)		<input type="button" value="+"/> <input type="button" value="-"/>

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

Other (describe): Yes No

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

Comments:

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Project Includes honorarium or salary for the Principal Investigator: Yes No **19**

Does this research involve Aboriginal/Indigenous peoples, their communities or knowledge systems? Yes No **20**

Add/remove lines

UofA Co-Investigator(s)

Resource	Employee ID	Name	Department	Description	Faculty	Description	Intellectual Credit (%)	Acknowledge	Deny	Acknowledge Status
1 PI	1230259	Nforis,Arwo	160300	ART English & Film Studies	150000	ART Faculty of Arts	100.00			
2 Co-PI	0871616 21	Wwabs,Nexis	160300	ART English & Film Studies	150000	ART Faculty of Arts	(Not required) 0.00	Acknowle	Deny	Pending
3 Co-PI	0352118	Usloq,Hiewoos	160300	ART English & Film Studies	150000	ART Faculty of Arts	0.00	Acknowle	Deny	Pending



Attachment

Attached File	Attachment Date
1	

22

Add attachments

Submission Comments:

Approvals

Approval Status: Not Submitted for Approval

23

24

25



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