Linking Collaboration to Research Data

Overview

The University of Alberta is increasingly driven by interdisciplinary research teams. However, our legacy systems primarily track the Nominated Principal Applicant (NPA), leaving the vital contributions of co-investigators invisible in institutional data.

To address this, we are evolving our systems to align with Budget Model 2.0. As of March 2026, these implemented changes to PeopleSoft will:

- Accurately Track Collaborations: Integrate team data with institutional research metrics.
- Fair Revenue Allocation: Ensure research revenue is shared across all participating Faculties based on actual contribution.
- Modernize PeopleSoft: Replace the generic "Co-PI" label with specific roles that reflect the nature of each researcher's work that can be aligned with roles specified by major sponsors.

The Shift: From Lead-Only to Team-Based Credit
Currently, the research metrics used to drive faculty budget allocations are linked only to the nominated principal applicant. To recognize that collaboration drives high-impact research, we are introducing a “Researcher Contribution” function in PeopleSoft.

During the proposal phase, teams will now select roles that correlate to the extent of their contribution. This ensures that when researchers from different Faculties collaborate, the resulting revenue and data metrics are shared proportionately among all contributing units.

> ***Implementation Timeline:** Immediate use focuses on enhanced reporting. Full integration into the Budget 2.0 allocation process is targeted for Fiscal 2028.

Investigator Roles & Guidelines

Researchers must now select the most accurate role for collaborators from the following categories:

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Standard Roles (For Non-Tri-Agency Sponsors)

Use these roles for any sponsor other than NSERC, CIHR, SSHRC, or TIPS-NFRF.

Role	Responsibility Level	Impact on Proposal
Nominated Principal Applicant (NPA)	Lead: Responsible for design, administration, and the majority of the work.	Primary lead and account holder.
Co-Principal Applicant (CPA)	Co-Lead: Near-equal responsibility for design and execution.	Essential: Project would be significantly altered without them.
Co-Applicant (CA)	Essential Collaborator: Leads specific aspects (e.g., analysis, equipment).	Significant: Removal requires major adjustments to the proposal.
Collaborator (C)	Contributor: Provides specific expertise, materials, or personnel.	Supporting: Strengthens the project but is not essential to core work.

Sponsor-Specific Roles (Tri-Agency)

When applying for Tri-Agency funding, roles in PeopleSoft must mirror the sponsor's definitions to ensure seamless alignment.

- **NSERC:**
    - *** Applicant:** The lead coordinator for financial and administrative aspects.
    - **Co-applicant:** May lead some of the research; member of the core applying group.

- **Collaborator:** Expected to contribute to the intellectual direction or training.

- **CIHR:**
  - * **Nominated Principal Applicant:** The administrative and intellectual lead.
  - **Principal Applicant:** Responsible for leading intellectual direction (often multiple).
  - **Co-Applicant:** Actively participates but does not direct the overall project.
  - **Knowledge User:** Specifically for those using research to inform health policy or practice.
- **SSHRC:**
  - * **Applicant/Project Director:** Primary responsibility for intellectual and financial direction.
  - **Co-Director:** Shares intellectual leadership and planning with the Director.
  - **Co-Applicant/Co-Investigator:** Makes significant intellectual or financial contributions.
- **TIPS-NFRF:**
  - **Nominated Principal Investigator (NPI):** Administrative lead; must be an independent researcher.
  - **Co-Applicant:** Contributes to execution; may include practitioners or educators.
  - **Collaborator:** Contributes to execution but **cannot** be supported by grant funds.

Questions? Please contact your **Research Administration Specialists** by email at rsoinfo@ualberta.ca

System Walkthrough: Requesting a New Project

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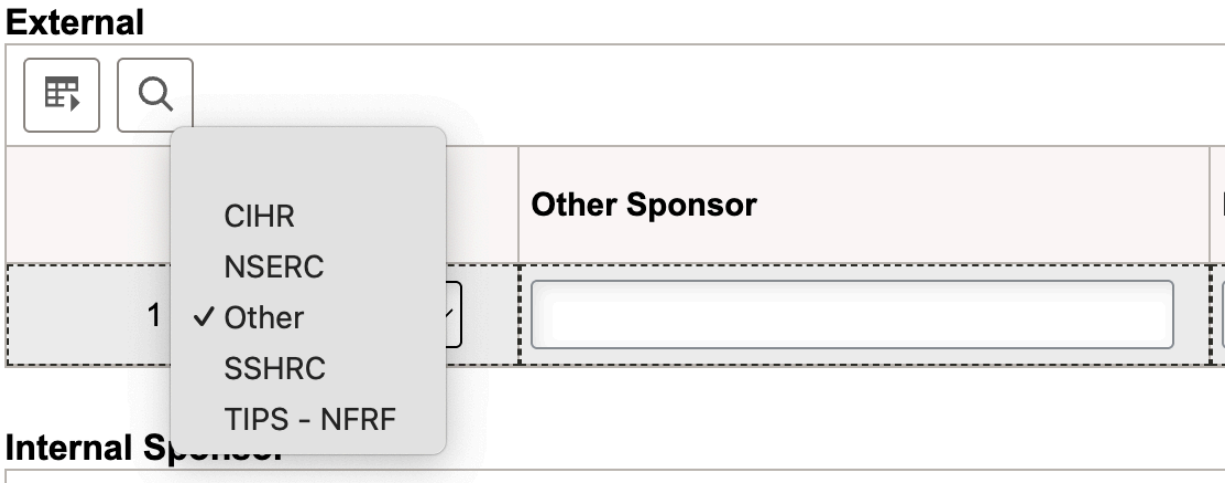
The following screenshots demonstrate the changes made on the Request for New Research Project page that will gather the new information for the research team members. For more information on how to request a new research project, please refer to our website.

Scenario A: Tri-Agency Sponsors

1. **Select Sponsor:** Choose CIHR, NSERC, SSHRC, or TIPS-NFRF.

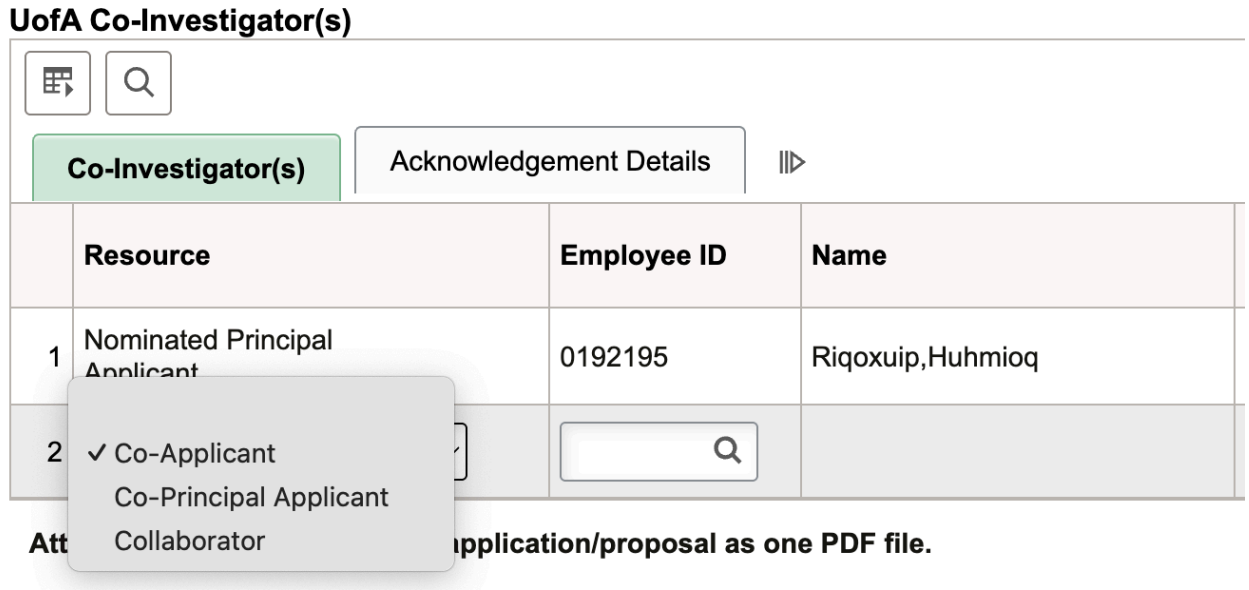


2. Assign Roles: The dropdown menu will automatically update to show only the roles specific to that sponsor (as defined above).

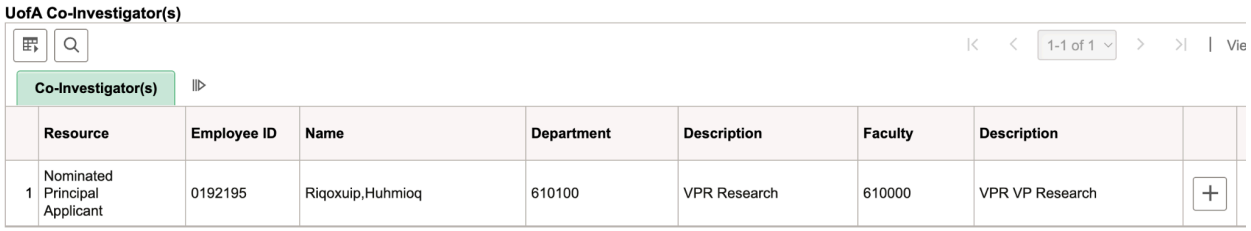
External

	*Sponsor	Other Sponsor
1	Other	Alberta Innovates

3. Add Team: Use the "UofA Co-Investigator(s)" section to add members and assign their **Standard Roles**.

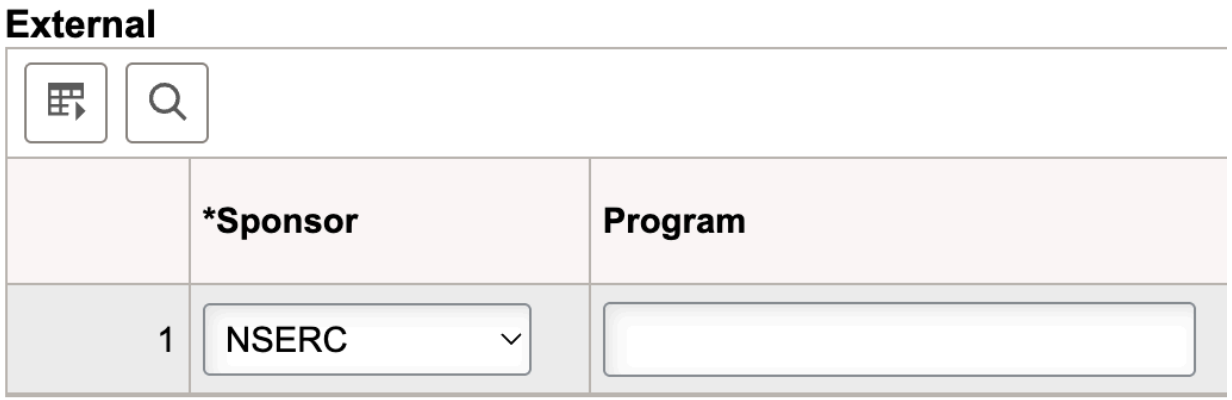


4. You may add as many team members as necessary by clicking the “+” button.



Scenario B: Non-Tri-Agency Sponsors

1. **Select Sponsor:** Choose "Other" for any non-Tri-Agency sponsor.



2. **Assign Roles:** The dropdown menu will automatically update to show only the roles specific to that sponsor (as defined above).

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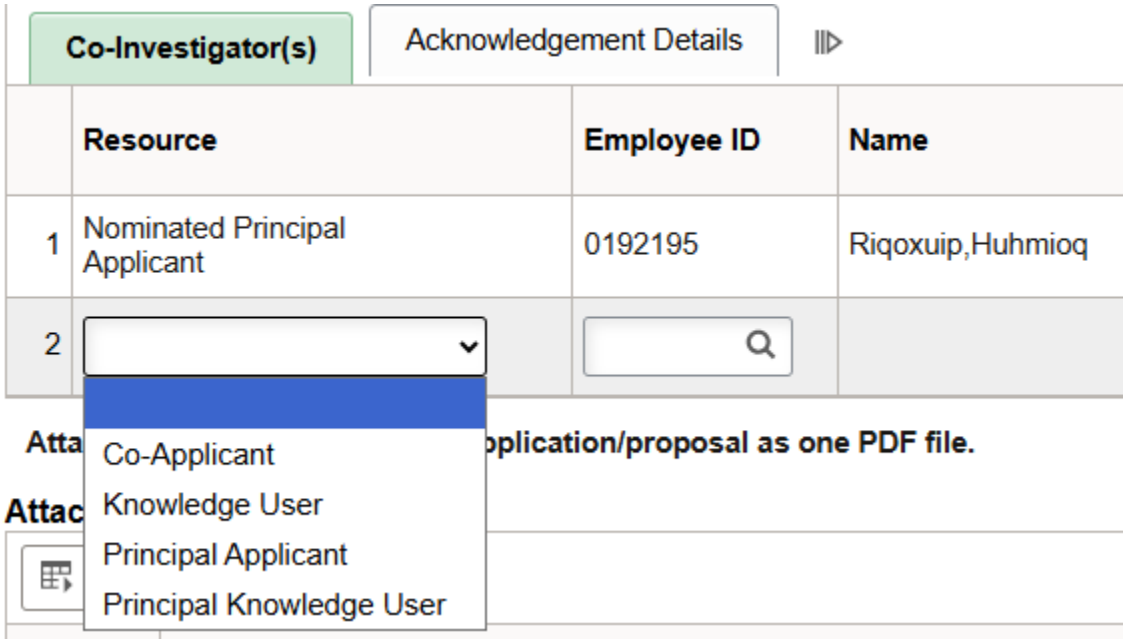
CIHR



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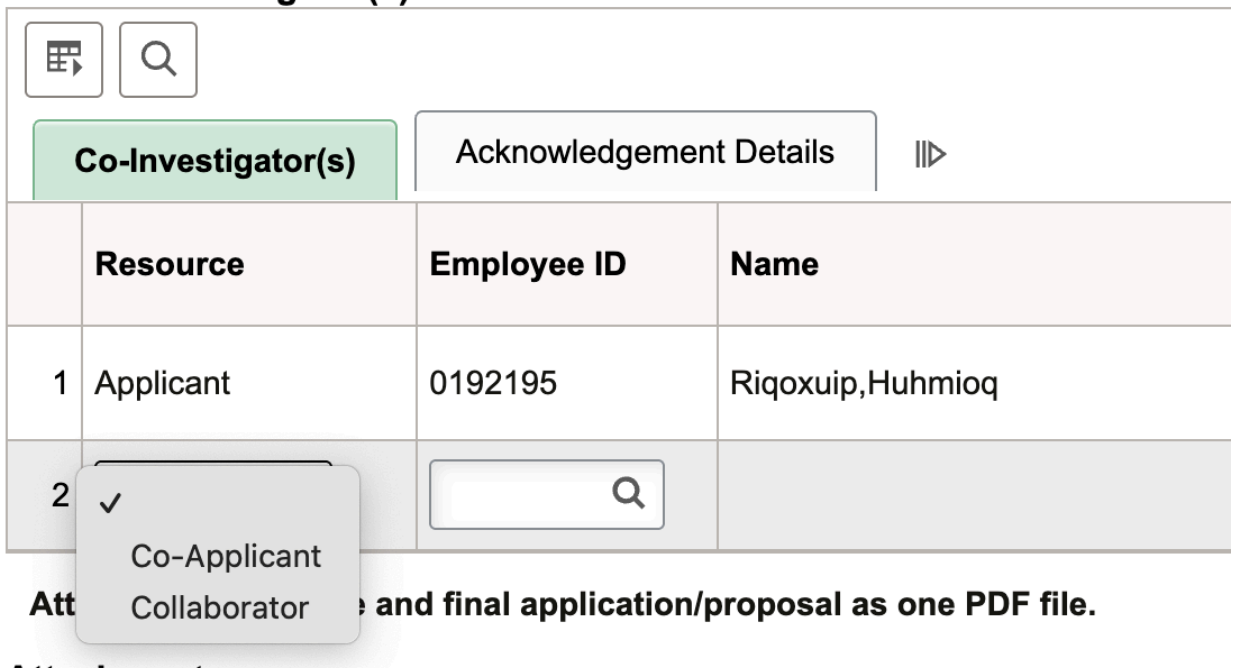
NSERC

UofA Co-Investigator(s)



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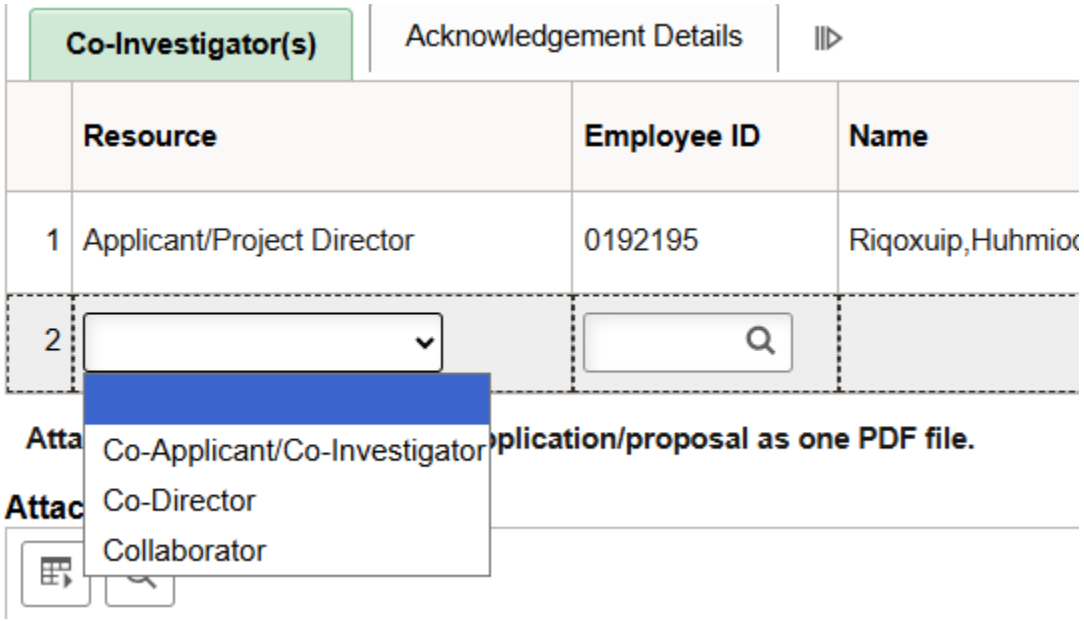
SSHRC



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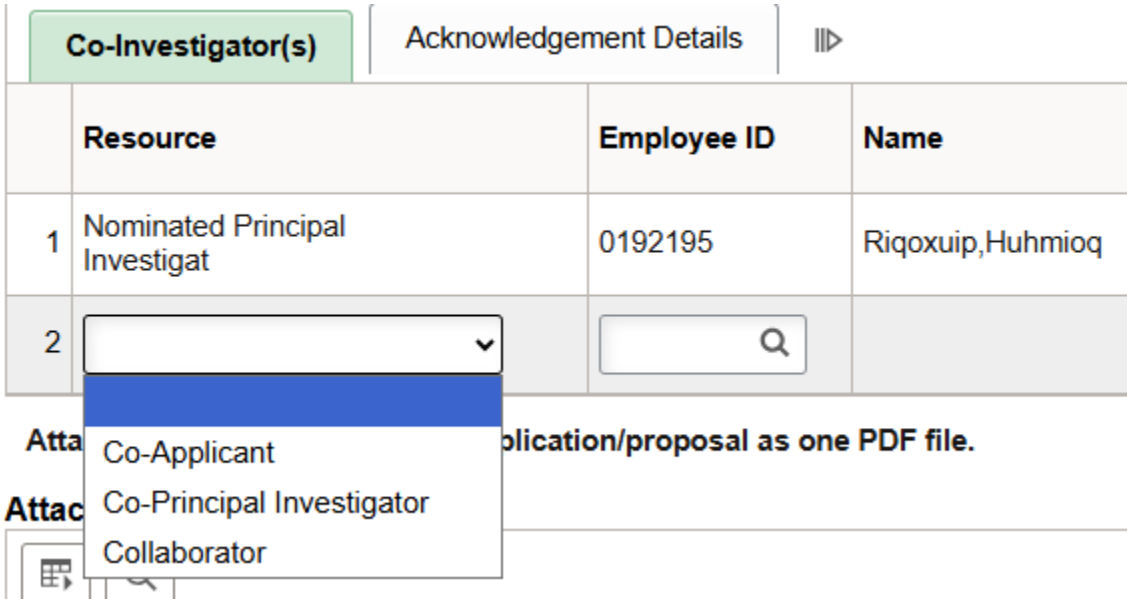
TIPS - NFRF