

Overview

1. The Generic Sponsor Form (GSF) is a collection of screens to be used for proposal preparation for those sponsors that do not require specific proposal forms. When a user selects one of the predefined sponsors from the list of available PennERA sponsors, the application will automatically display the GSF functionality and form set. This form set includes the following tabs: setup questions, abstract, personnel, budget, research plan, supporting documents, approvals and finalize.

>> Setup Questions
Abstract
Personnel
Budget
Research Plan
Supporting Documents
Approvals
Finalize

2. If appropriate, documentation can be uploaded. The upload sections include the following: Abstract, Personnel, Supporting Documents and Research Plan tabs. For instructions regarding uploading documents, please see the "Investigator Reference Sheet" which can be found at http://project.pennera.upenn.edu/PD_docs/InvestigatorRef.pdf. After data has been entered or uploaded, each tab must be checked as complete.

Budget

3. The budget needs to be addressed in two sections:
- The "Budget" tab is where the basic budget information is to be provided. This information, at a minimum must include the following key elements:
 - ✓ Key personnel & associated effort
 - ✓ Total direct expenses
 - ✓ Total F&A (indirect) costs
 - ✓ Any or all subcontract information
 - The "Supporting Documents" tab is where the detailed budget information is to be provided. This information will be supplied via an upload document.

Finalize & Assemble

4. Once the previous tabs are complete, the last tab is the "Finalize" Tab. The first section that is displayed is the "Build PDF / Form Pages" section.

Build PDF / Form Pages				
Form Page	Build	View	Last Built	Built By
UPENN - Generic Cover Sheet				

5. Click the "Build" button. This will gather all the entered information which will be used for the final proposal.

6. Once the build is complete, the "Assemble Application" section is displayed. The assembling of the proposal sections includes manually assigning sequence and page numbers if applicable.

Assemble Application				
Document	Page Count	Sequence	Page Numbers	Edit Build
UPENN - Generic Cover Sheet	1	1	0	
Abstract	1	2	0	
Personnel	1	3	0	
Supporting Documents	1	4	0	
Research Plan	1	5	0	

7. A cover sheet will automatically be generated detailing information regarding the principal investigator, the proposal, sponsor and standard University information.

8. Click the "Build" button. This will assemble the application and produce a PDF document. At this point, the proposal is ready to be printed out for sponsor submission.

Final Proposal (Built:23-Aug-2007 2:19:06 PM)

9. The final section is the "Submit for Internal Review" section.

Submit for Internal Review					
Current Proposal Status: All Status					
Components for Initial Application					Submit
Form Name	Open	Status	Action	Completed Form	Remove
Certification by Principal Investigator		Incomplete	N/A	N/A	(Mandatory)
Proposal Transmittal Form		Incomplete	N/A	N/A	(Mandatory)
Proposal	N/A	Completed			

Add Institution Forms/Supporting Documents

10. Click the icon under the "Open" column to fill out the "Certification by Principal Investigator." This form will appear in its own window.

11. Place your mouse over the red "Menu" item. Click the "Check In/Out" button to check the form out for editing.

12. Enter all of the necessary data including all of the required fields (denoted by an *) and check the "Complete" checkbox in the upper right corner. **Complete**

13. Click the "Check In/Out" button again to check the page back in and close this window.

14. Repeat Steps #10 through #13 using the "Proposal Transmittal Form" edit icon to complete the Transmittal Form.

15. Click the **Submit** icon to submit the proposal for internal routing. You will be prompted to re-enter your PennKey and PennKey password. Once completed, the application will display the predefined routing path for the proposal.

PennERA users will find a variety of help and reference materials on PennERA's homepage of <http://project.pennera.upenn.edu>. Users should also feel free to click on the "Support" link while in the Proposal Development application or send an email to pennerahelp@pobox.upenn.edu.