SC EPSCoR/IDeA

SC EPSCoR/IDeA Proposal Submission Portal

https://scepscoridea.org/Solicitations/proposals/

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INTRODUCTION

The SC EPSCoR/IDeA Program developed this portal to assist Principal Investigators with the construction and submission of the final proposal document. This guide has several screen shots (sometimes partial) to illustrate the various steps. *The IMPORTANT NOTE section of this guide is a must read!*

The proposal submission portal has the following major functions:

- **Upload proposal requirements** (The term "requirement" refers to a section of the proposal). Each section should be uploaded separately. For solicitations that require or allow multiple institutions or Co-PIs, sections such as the Budget, budget justification, biographical sketches and List of Conflicts can be uploaded as multiple files. The order of these files can be later rearranged.

- **Download the proposal** as a single combined PDF with a table of contents and page numbers. The resulting file is a combination of the uploaded requirements that can be used to proof or save a copy of the full proposal.

- **Generate a report** to determine if the correct files have been uploaded as planned.

- **Submit the Proposal** to the SC EPSCoR/IDeA program. This is the official submission of the proposal.

- **Edit the Proposal** to go back and make changes to the proposal. This function withdraws the proposal submission. *Remember to re-submit the proposal.*

The proposal sections (or Requirements) for each solicitation may vary. This User's Guide demonstrates the steps for a solicitation called the "2017 Stimulus Research Program" and is used here as an example. Other solicitations may have fewer requirements. As an example, the "Stimulus Research Program" has 13 requirements:

Requirement	# of Files Allowed
1. Cover Page	1
2. Project Summary	1
3. List of Collaborators/Participants	1
4. Project Description	1
5. Collaboration, Inclusion, Mentoring and Sustainability Plan	1
6. Plans to Increase Research Capabilities and Competitiveness	1
7. References	1
8. Biographical Sketches	>1
9. Budget and Budget Justification	>1
10. Cost-share Letter of Commitment	1
11. Facilities, Equipment, and Other Resources	1
12. Current and Pending Support	>1
13. List of Conflicts	>1

IMPORTANT NOTE

1. Only PDF files can be uploaded.

2. Do not upload fillable PDF files without first "printing" them as pdf files. To upload a fillable pdf file, print the file as a pdf, then upload the printed file. You may also upload a scanned copy of fillable PDF files.

3. The largest file size that can be uploaded is 8 MB.

4. The Proposal Submission Portal will not be accessible after the announced submission deadline (date and time). No proposals will be accepted after this date and time.

5. If you refresh your browser, the last thing you did will be done again. So, if you uploaded a file then refreshed the browser, the same file will be uploaded and you may see a duplicate in the table of uploaded files.

6. If you run into difficulties with the Proposal Submission Portal, use the hep or help button.

PORTAL REGISTRATION

You must register for the solicitation to which you wish to submit a proposal. To register for a solicitation, go to https://scepscoridea.org/Solicitations/proposals/index.php and click on "Click here to register" then complete all the information requested. You will then receive an email with a temporary password. *Sometimes these emails end up in the junk mailbox!*
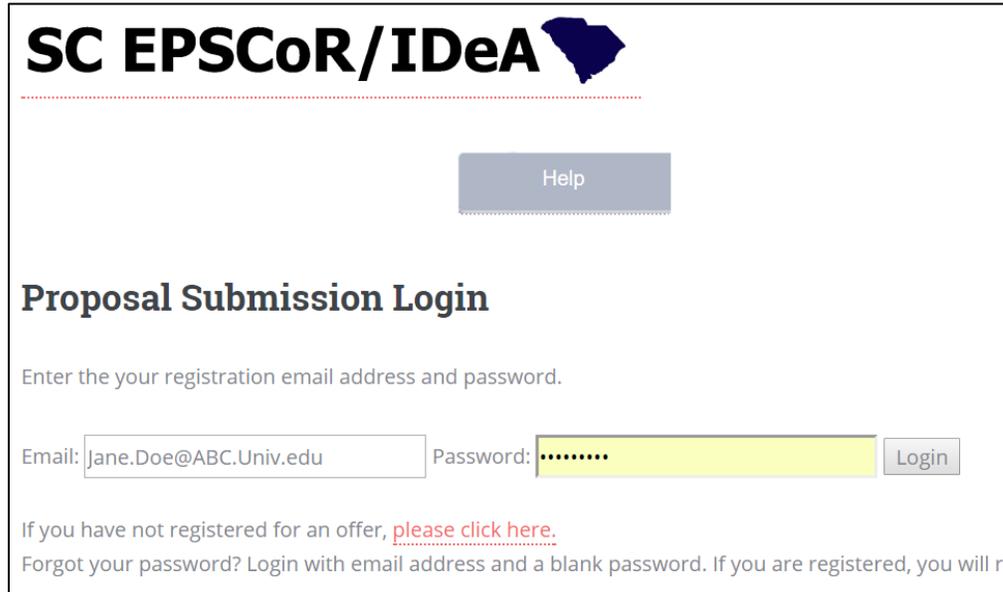
To complete your registration, you must change the password within 72 hours of receiving the temporary password by doing the following:

Follow the link given in the email

Enter your email address and the temporary password

Change your password as instructed

then login

If you are interested in submitting proposals to more than one offer, you must register for each offer separately. This can be done in one of two ways:

- By using the same email address you used to register for another offer but with a different password, or

- by using a different email address for each solicitation.

UPLOADING PROPOSAL REQUIREMENTS

After logging in to the Portal, you will be automatically directed to the main page of the portal shown below. This page contains the solicitation name and most of the functions that you will need to upload files and submit the proposal.

If you are registered for more than one offer, please make sure you are aware of the solicitation name displayed to avoid uploading files to the wrong proposal.

You can start uploading your proposal files by selecting a requirement, such as: "1. Cover Page" as shown below in the partial image of the screen, then

> Click "Choose file"

> Select the PDF file from a directory on your computer

> Click "Load File"

The file will be uploaded and the file name will appear in a table (this table is called the Requirements Table). Repeat the above to upload the other requirements.

The following partial screen shot is a sample of what will be displayed in the Requirements Table after requirements 1 through 4 have been uploaded.

Note the delete function to delete any uploaded file.

Upload Proposal Files

Please select a requirement to review the brief description of the requirement. For more details, click the offer title. Only load files in PDF for

| 1. Cover Page | ▼ | Upload PDF File: | Choose File | No file chosen | Load File |

Requirement: Upload scanned pdf file only. Do not upload the fillable Appendix A unless it is a scanned copy with signatures.

Reorder Files Loaded

Univ-2 Budget.pdf has been removed.

Action	Requirement	File Name	Size	Loaded
Delete	1. Cover Page	Signed Cover Page.pdf	31.1KB	2017-08-09 07:50:37
Delete	2. Project Summary	Project Summary.pdf	69.1KB	2017-08-09 08:06:09
Delete	3. List of Collaborators/Participants	List of Collaborators-Participants.pdf	31.1KB	2017-08-09 07:51:07
Delete	4. Project Description	Project Description.pdf	1.0MB	2017-08-09 08:06:20

UPLOADING REQUIREMENTS THAT ALLOW MULTIPLE FILES

Depending on the solicitation, some offers allow multiple files to be uploaded for a single requirement. This is common for offers that require collaboration among institutions, such as the Stimulus Research Program or the GEAR CRP program. The requirements that allow multiple files are related to budgets and biographical sketches, among others.

For example, using the biographical sketches requirement as a demonstration,

- You may upload all biographical sketches as one combined PDF file for this requirement, or

- You may upload the biographical sketch of each investigator one PDF file at a time using this requirement.

The screenshot below shows multiple files uploaded to meet the biographical sketches requirement. To re-arrange the order in which they appear, see the Reorder Files Loaded section below.

Upload Proposal Files

Please select a requirement to review the brief description of the requirement. For more details, click the offer title. Only load files in PDF form

| 1. Cover Page | ▼ | Upload PDF File: | Choose File | No file chosen | | Load File |

Requirement: Upload scanned pdf file only. Do not upload the fillable Appendix A unless it is a scanned copy with signatures.

Reorder Files Loaded

Action	Requirement	File Name	Size	Loaded
Delete	1. Cover Page	Signed Cover Page.pdf	31.1KB	2017-08-09 07:50:37
Delete	2. Project Summary	Project Summary.pdf	69.1KB	2017-08-09 08:06:09
Delete	3. List of Collaborators/Participants	List of Collaborators-Participants.pdf	31.1KB	2017-08-09 07:51:07
Delete	4. Project Description	Project Description.pdf	1.0MB	2017-08-09 08:06:20
Delete	5. Collaboration, Inclusion, Mentoring and Sustainability Plan	Collaboration Inclusion.pdf	31.1KB	2017-08-09 08:06:44
Delete	6. Plans to Increase Research Capabilities and Competitiveness	Plans to increase SC.pdf	31.1KB	2017-08-09 08:07:05
Delete	7. References Cited	References.pdf	101.6KB	2017-08-09 08:08:33
Delete	8. Biographical Sketches	Lead PI Bio.pdf	84.9KB	2017-08-09 08:08:43
Delete	8. Biographical Sketches	Co-PI Smith Bio.pdf	83.1KB	2017-08-09 08:09:05
Delete	8. Biographical Sketches	Co-PI Fun Bio.pdf	83.1KB	2017-08-09 08:11:11
Delete	8. Biographical Sketches	Co-PI Happy Bio - Copy.pdf	84.9KB	2017-08-09 08:08:51
Delete	8. Biographical Sketches	Co-PI Brown Bio.pdf	83.1KB	2017-08-09 08:09:49
Delete	8. Biographical Sketches	Co-PI Joy Bio - Copy.pdf	84.9KB	2017-08-09 08:10:47

The same process can be applied to all requirements that allow more than one file to be uploaded. For example, if allowed, Budget and Budget Justification requirements can be uploaded as multiple files (shown below) or as a single file.

Delete	8. Biographical Sketches	Co-PI Joy Bio - Copy.pdf	84.9KB	2017-08-09 08:10:47
Delete	9. Budget and Budget Justification	Lead Univ Budget.pdf	104.5KB	2017-08-09 08:19:50
Delete	9. Budget and Budget Justification	Univ-2 Budget.pdf	93.5KB	2017-08-09 08:12:57
Delete	9. Budget and Budget Justification	Univ-3 Budget.pdf	93.5KB	2017-08-09 08:13:10
Delete	9. Budget and Budget Justification	Univ-4 Budget.pdf	93.5KB	2017-08-09 08:13:15

REORDERING/SORTING REQUIREMENTS THAT HAVE MULTIPLE FILES

For requirements with multiple files, such as budget and budget justification, biographical sketches, etc., click on "Reorder Files Loaded" to put the files in the desired sequence. A desired sequence may be to order biographical sketches in alphabetical order. The image below shows an example of the "ordering" table.

2017 Stimulus Research Program

Only the requirements that have multiple files loaded are shown. Enter integers in the textbox for each row to indicate the new sort order. Note that files are only sorted within each requirement group. Click the Sort button to save your changes.

Order	Requirement	File Name	Size	Loaded
First Name: 1	8. Biographical Sketches	Lead PI Bio.pdf	84.9KB	2017-08-09 08:08:43
First Name: 2	8. Biographical Sketches	Co-PI Smith Bio.pdf	83.1KB	2017-08-09 08:09:05
First Name: 3	8. Biographical Sketches	Co-PI Fun Bio.pdf	83.1KB	2017-08-09 08:11:11
First Name: 4	8. Biographical Sketches	Co-PI Happy Bio - Copy.pdf	84.9KB	2017-08-09 08:08:51
First Name: 5	8. Biographical Sketches	Co-PI Brown Bio.pdf	83.1KB	2017-08-09 08:09:49
First Name: 6	8. Biographical Sketches	Co-PI Joy Bio - Copy.pdf	84.9KB	2017-08-09 08:10:47
First Name: 1	9. Budget and Budget Justification	Lead Univ Budget.pdf	104.5KB	2017-08-09 08:19:50
First Name: 2	9. Budget and Budget Justification	Univ-2 Budget.pdf	93.5KB	2017-08-09 08:12:57
First Name: 3	9. Budget and Budget Justification	Univ-3 Budget.pdf	93.5KB	2017-08-09 08:13:10
First Name: 4	9. Budget and Budget Justification	Univ-4 Budget.pdf	93.5KB	2017-08-09 08:13:15

Sort Files

DOWNLOAD THE PROPOSAL

The "Download Proposal" function combines all uploaded files into one PDF file in the order they appear in the Requirements Table and builds a table of contents. It is important to review this combined PDF document for accuracy, completeness, and before submitting the proposal.

GENERATE A REPORT

The "Generate Report" function displays two tables. The first table contains all the requirements for the specific offer solicitation showing a column with the Requirement, another column with the number of files allowed for each requirement, a third column for the files that were loaded to meet each requirement, and column with warnings. Use the Generate Report function to verify that you have uploaded the correct number of files for each Requirement.

The following is a sample of the tables displayed by clicking "Generate Report".

2017 Stimulus Research Program

Download Proposal — Combine all proposal files into one PDF with a TOC

Generate Report — Compare the requirements vs. the uploaded files

Submit Final Proposal — WARNING: Submitting the proposal terminates your ability to make changes

Upload Proposal Files

Please select a requirement to review the brief description of the requirement. For more details, click the offer title. Only load files in PDF format:

1. Cover Page ▼ Upload PDF File: Choose File — No file chosen   Load File

Requirement: Upload scanned pdf file only. Do not upload the fillable Appendix A unless it is a scanned copy with signatures.

Reorder Files Loaded

Requirement	Files Allowed	Files Loaded	Warning
1. Cover Page	1	1	
2. Project Summary	1	1	
3. List of Collaborators/Participants	1	1	
4. Project Description	1	1	
5. Collaboration, Inclusion, Mentoring and Sustainability Plan	1	1	
6. Plans to Increase Research Capabilities and Competitiveness	1	1	
7. References Cited	1	1	
8. Biographical Sketches	> 1	6	Multiple files allowed.
9. Budget and Budget Justification	> 1	4	Multiple files allowed.
10. Cost-Share Letter of Commitment	1	0	No files loaded.
11. Facilities, Equipment and other Resources	1	0	No files loaded.
12. Current and Pending Support	> 1	0	No files loaded.
13. List of Conflicts	> 1	0	No files loaded.

Action	Requirement	File Name	Size	Loaded
Delete	1. Cover Page	Signed Cover Page.pdf	31.1KB	2017-08-09 07:50:37
Delete	2. Project Summary	Project Summary.pdf	69.1KB	2017-08-09 08:06:09

SUBMIT PROPOSAL

After you have uploaded all the files that are required by the solicitation, click the "Submit Final Proposal" button. After clicking the "Submit Final Proposal", a message will appear confirming your submission as shown below. Also, a new button ("Edit Proposal") will appear.

EDIT PROPOSAL

The "Edit Proposal" button appears only after you have submitted the proposal. If you wish to go back to review or make changes to the files you have uploaded, click the "Edit Proposal" button to get access to the Requirements Table again.

WARNING: By clicking "Edit Proposal" you are withdrawing the submission and you must resubmit the proposal once again before the proposal submission deadline. A withdrawn proposal will not be considered for review.