SETTING UP PROPOSAL in eRA.temple.edu
If you are a new user, go to era.temple.edu and click on the “Login” tab.

On the Login site, input your AccessID and Password.

Follow the prompts to get added to eRA. If you are a student, your email address will be your full name as assigned by the university. New profiles are automatically added to and will become active the next morning by 8 am if requested prior to Midnight the prior day.
As part of research support, proposal records are typically created by your Department’s assigned Business Administrator. This guide is provided as a reference on the set up process.

After logging into era.temple.edu, on the left side of the site you will see “My Proposals”. Click on tab and a menu will drop down. Click on “Create New Proposal”.

On the next page, you will answer a series of questions to set up the proposal.
STEP 0: You will select the name of the lead PI. Click “Change PI” and a drop down menu will appear. You will click on the letter corresponding to the PI’s last name. In the drop down menu search for the PI’s name and then click “Select”.
Once the PI is selected, you will click “Continue to Next Step”. You will be prompted to Select from Grants.Gov Opportunities, Setup Proposal Manually, etc.

The Program Announcement will dictate this selection.
If it is a Grants.Gov proposal, a field will appear and you will input the program announcement number and click “Select”. The program will populate all proposal packages associate with the announcement. You will click on the hyperlink below the announcement number to select the appropriate proposal package.
If the proposal will be submitted through another mechanism, you will “Setup Proposal Manually”. You will select a sponsor by clicking on the letter corresponding to the sponsor’s name. (Note: if you do not find the sponsor email era@temple.edu to request the sponsor be added. Include sponsor’s name, address, and website.)
Once the sponsor has been set up, you will be prompted to enter the “Title” and then the Project Start and End dates. Click “Continue to Next Step” after each Step.
After you enter the project dates, Step 7 will ask you to confirm the number of budget periods. Click “Continue to Next Step”. The last prompt will ask you to confirm all information above to Create the Proposal. You can click on the “Back” button on the upper right to go back and change any information.
After you click “Yes, create proposal”, the system will assign an eRA number, located at the upper left corner of page. You will be asked to answer a series of set up questions which deal with IRB, IACUC, Subaward and organizational assignment. Click the “Show” button before filling out any questions.
On the set up tab, you will need fill in all information asked. If Temple is a subawardee, select “Yes” and a popup will appear. You will click on the hyperlink “Change” under Originating Sponsor and select sponsor. Click Save.

Enter due date of proposal and time (use 24 hour clock)

To change Organization designation

Select 424 budgeting and Research 1

At the bottom of screen Click “SAVE” button.
The form will then create tabs on the left side of the screen. Each tab must be checked completed to finalize the record. A Check box is located on the upper right corner of each tab. When you have uploaded the necessary documents on each tab, then you can check the box.

A red check mark will appear next to the tab.

On the Facepage, you will need to complete the fields outlined in red for a manual proposal. On system to system proposal (Grants.gov proposals). The fields will be highlighted a pale yellow. Click on the empty field and a screen will redirect you.
On the drop down menu, select the assigned Grant Specialist to your department. Click on “Set” and the contact information will populate. Click “Back” button. Repeat the step for the Authorized Representative.

When you have completed filling out the needed information, click on “Floppy Disk” icon on the upper left of screen to save.

When you are finished with the tab, click on the “Completed” box on upper right.
For Manual Proposals the following documents are needed to complete the record:

**Abstract Tab** – Upload a summary of the project

**Personnel Tab** – Identify Key personnel that will be in routing queue and upload biosketch/CV

**Budget Tab** – Upload budget, Budget justification

**Research Plan Tab** – Upload the Full proposal as it will be submitted to Sponsor

**Approvals Tab** – Identify any IRB, IACUC, BioHazards. Create record for approved protocols that can be linked when proposal is funded.

**Supporting Documents Tab** – Nothing uploaded, just check of completed.

**Temple Documents Tab** – Upload the following:

1. Program Announcement/Proposal Guidelines,
2. Excel Budget with account codes,
3. Any other internal documents needed (i.e., Temp PI form, Sub-recipient documents, and
4. Full Proposal as submitted to Sponsor.
For System to System proposals, the documents need to complete the record will be delineated by the program announcement.

**Temple Documents Tab** – Upload the following:
1. Program Announcement/Proposal Guidelines,
2. Excel Budget with account codes,
3. Any other internal documents needed (i.e., Temp PI form, Subrecipient documents, and
4. Full Proposal as submitted to Sponsor.

*Documents uploaded in Temple Documents will not go to the sponsor. Any documents needed by Grants Management will be uploaded here.*
On the Personnel Tab, you will upload the Biosketch/CV. Click on the check box that upload icon will appear. Click on the upload icon and the “Biosketch” field will appear below.

On the right of the names of Key Personnel you will see symbols. The warning closest to the PI name is a “Profile issue”. If you hover your mouse arrow over the icon it will tell you what issue needs to be addressed.

Under the COI field, three different icons may appear. A “?” indicates that an FCOI needs to be created. A “√” indicates that the FCOI is certified. A “⚠️” indicates that the FCOI has expired and needs to be updated/recertified.
Personnel can be added under the Personnel Tab or Budget Tab. To add personnel to the budget you will click on “Personnel Wizard”. A pop-up screen will appear and you will answer each question in order. For any unnamed individuals, see answers below as a template. Click “Continue” and a new pop-up will appear.

![Add Personnel Screen](https://era.temple.edu/proposal/PD/AddPeople.asp?ProjID=31907F5DD6FB2CE5E053B510600A76C4&Parent=TEPerso)

**Add Personnel**

- Is this person appointed to your institution, or will they be if they are not hired or identified yet? **Yes**
- Does this person currently work at your institution? (“No” implies they either do not work here yet, or are otherwise not assigned or identified yet.) **No**
- Is this person “named” or will they be determined later (TBD)? **TBD**

Please enter the designation for the “TBD” person. **TBD**

Department **CST. BIOLOGY (13120)**

Please Select the “Personnel Type” for this person on this proposal. 
- Key
- Other Significant Contributor **
- Non-Key
- Consultant - Key **
- Consultant - Non-Key **

**These people will not be added to the budget in the Personnel section.**
After you click “Continue”, you will be asked to fill in contact information for the person. If the person is KEY, then all items highlighted in yellow must be filled in. If the person is non-KEY then you will just need to select the person’s role. Click “Save” then “Close” on the upper right of screen.
On Budget Tab, you will click on Budget Items to begin filling in budget numbers.

Again to add personnel, you will click on “Personnel Wizard”. To fill in effort and salary, click on “folder” icon to the left of the Name/Role of each designated Personnel.
Fill in the budget details from the Excel Spreadsheet to corresponding fields for each personnel line item.

Increase by 3%

For Non-Key – enter # of people (Post Doc, RA, Technician)

Increase by 3%
Under “Non-Personnel Costs” on the “Budget Item” tab, click on “click to add” to add non-compensation costs.

Type in Specific line item (i.e., supplies, publication, etc.)

From drop down select the corresponding category

To add next budget item
Once all budget items are input and the numbers are checked against the Excel spreadsheet, click on the “Completed” box and click on the subsequent tab item – F&A.
Under F&A, you have the option of having the program auto-fill (predefine) the F&A or you can manually enter the F&A.

You will also need to determine which F&A rate applies to the proposal (i.e., On-Campus Research (56%), Off-Campus Research (26%), On-Campus Research –DOD (58%), etc.

If you chose to manually enter F&A, enter corresponding amount from Excel here.

Check when done and move to next tab.
On Cost Sharing tab, check off Completed and move to Justification.

Upload the budget justification and check of Completed. The main “Budget” tab will have a “Red” check mark appear.
Under “Research Plan” (non System to System proposals), you will upload the Full proposal (as it will be submitted to sponsor). Change “Draft Version” to “Final Version”, click “Save” and check Completed Box.

Under a System to System proposal, you will follow the Program Announcement instructions and upload the required documents to the corresponding upload tab.
Under “Approval” tab, if you have any IRB, IACUC, EHRS protocols, you will create a link so when the proposal is funded, the approvals can be linked to the record. Click on “Add”. Then select type of protocol, Human, Animal, etc., Not Attached. Click Continue on right.

Then, under Status, select “Pending”. On upper left corner, click on Save. Click on Completed box.
**Temple Documents Tab** – Upload the following:

1. Program Announcement/Proposal Guidelines,
2. Excel Budget with account codes,
3. Any other internal documents needed (i.e., Temp PI form, Sub-recipient documents, and
4. Full Proposal as submitted to Sponsor.

Click on icon to fill out SPAF FORM
On the SPAF, fill in or check off all items marked with “∗”.

Under “College”, select “CST: Science & Technology”.

---

**Compliance & Commitments (eSPAF)**

**Institution Number:** 2593

- **Proposal Title:**
  - Sponsor Name: DEPARTMENT OF DEFENSE
  - PI Name: 
  - College: CST-SCIENCE & TECHNOLOGY (13000)

- **Proposal Type:** New
- **Program Type:** RESEARCH 1 (laboratory)
- **Instrument Type:** Grant
- **Program Name:** 

**Funding Opportunity Number:** BREAKTHROUGHFL12

**Deadline Date:** 05-May-2016

**Requested Budget Details:**
- **Requested Budget Start Date:** 01-Sep-2016
- **Requested Budget End Date:** 31-Aug-2019

<table>
<thead>
<tr>
<th>Period 1</th>
<th>Period 2</th>
<th>Period 3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Costs</td>
<td>$125,000.00</td>
<td>$125,000.00</td>
<td>$125,000.00</td>
</tr>
<tr>
<td>Subawards</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Indirect Costs</td>
<td>$72,500.00</td>
<td>$72,500.26</td>
<td>$72,499.80</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$197,500.00</td>
<td>$197,500.26</td>
<td>$197,499.80</td>
</tr>
</tbody>
</table>

**Year 1 MTDC:** $125000

**Total MTDC:** $375000

**KEY PERSONNEL ON THE PROPOSAL:**

<table>
<thead>
<tr>
<th>PI Name</th>
<th>Department</th>
<th>Role</th>
<th>Net Effort</th>
</tr>
</thead>
<tbody>
<tr>
<td>CST: BIOLOGY (13120)</td>
<td></td>
<td>PD/PI</td>
<td>60</td>
</tr>
<tr>
<td>CST: BIOLOGY (13120)</td>
<td></td>
<td>Co-PD/PI</td>
<td>2</td>
</tr>
<tr>
<td>CST: BIOLOGY (13120)</td>
<td></td>
<td>Co-PD/PI</td>
<td>5</td>
</tr>
</tbody>
</table>
Once all documents are uploaded in “Temple Documents”, you will click on the “Thumbs Up” icon to route the proposal for administrative review.
A Pop-Up screen will appear asking you to certify the project. Click on “Accepted” radio button and then “Continue”. The next Screen will show the routing queue. Click on the Submit button on the right.
The “Active Routing Progress” will appear under the uploaded documents. When this queue disappears and all menu tabs have Red checkmarks, the approval process is complete and the proposal is ready to finalize.
To finalize the record for submission, go to the “Finalize” tab and click Build. Under Build PDF/Form Pages.

Under Assembled Application click Build.
On Submit for Internal Review, click on the “Thumbs Up” icon. Complete the certification and then submit.