Creating Manual Proposals

Manual Proposals are used for all proposals not submitted via Grants.gov. Examples include: proposals where LSU is a subrecipient; proposals to non-federal agencies; National Aeronautics Space Agency (NASA) proposals which use NSPIRES; National Science Foundation (NSF) proposals that must be submitted via FastLane or Research.gov (i.e. linked collaborative proposals, NSF proposals will no PI effort).

How to Create a Proposal Development (PD) Record

It is recommended that you use Chrome or Firefox for GeauxGrants. Login through myLSU.

- **Step 1:** From the home screen, select “Sponsored Projects” on the left-hand navigation tabs.
- **Step 2:** From the Sponsored Projects screen, select “Proposal” under Create New

New Proposal Questionnaire

The New Proposal Questionnaire consists of several steps (Steps 0-7). To go back a step, click Back on top right. All search fields are progressive text.

- **Step 0:** Defaults to user. You can change to another Principal Investigator (PI) by clicking Change. Type last name, first name of PI and click Select.
• **Step 1**: Click on “Create a New Proposal” and click Continue

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be
Step 1: Create a “New” Proposal or “Copy From Existing”?  
Create a New Proposal
Copy From Existing Proposal

Tiger, (L14) Mike the Change

• **Step 1 Continued**: Choose Setup Proposal Manually and click Continue.

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be
Step 1: Create a “New” Proposal or “Copy From Existing”?  
Create a New Proposal
Copy From Existing Proposal

Step 1: Continued

• **Step 2**: Choose Proposal Type and Click Continue.

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be
Step 1: Create a “New” Proposal or “Copy From Existing”?  
Create a New Proposal
Copy From Existing Proposal

Step 2: Please Select a Proposal Type

• **Step 3**: Enter Sponsor Name. This field is progressive text, and you only need to enter part of name (i.e. Foundation). Make sure you click on correct name and click Continue.

**TIP!** If sponsor is not listed, select “Other Sponsor (To Be Added).” Complete the Request to Add New Sponsor form at [https://lsu.edu/geauxgrants/sponsored_projects/request_new_sponsor.php](https://lsu.edu/geauxgrants/sponsored_projects/request_new_sponsor.php)

• **Step 4**: Will be automatically numbered by the system

• **Step 5**: Enter Proposal’s Title and click Continue

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be
Step 1: Create a “New” Proposal or “Copy From Existing”?  
Create a New Proposal
Copy From Existing Proposal

Step 2: Choose Proposal Type

Step 3: Please Enter a Requestor Name

Step 4: Adding “numberer” or “Proposal Number”

This is a default requestor name/number

Step 5: Enter Proposal’s Title

Create a New Proposal
Copy From Existing Proposal

This proposal will be automatically numbered
• **Step 6**: Enter Project Start and End Dates and click Continue

![Image of Step 6]

• **Step 7**: Confirm number of budget periods. If this changes, the dates will need to be changed on the Budget Setup section of the Budget. Click Continue.

![Image of Step 7]

• Click Back or Step back through responses button at any step to go back to the previous step to change information.

• Ensure all information is correct and click Create Proposal.

### Setup Questions

GeauxGrants will automatically generate a Proposal/Record/Institution #. GeauxGrants numbering will be AMFYXXXX. For Fiscal Year (FY) 2022, all numbers begin with AM22.

This tab gathers general information about your proposal. After you complete this section, additional proposal tabs will appear to the left of the screen.

**TIP!** Click Done on top left to close out the proposal. Do not close browser using X on top right.

![Image of Setup Questions]
• Read instructions at the top of the page, answer all questions. Click Save at any point to preserve all data entered. Clicking Completed will validate form and will prompt user to save changes by clicking OK.

• Deadline: Enter deadline date as the date you would like OSP to submit your proposal. If submission has a deadline then you must also enter deadline time. Use Central Time Zone. For sponsors with deadlines after work hours, enter 5:00 PM. All proposal must be submitted by OSP before 5:00 PM.

• Associated Departments: If the proposal includes investigators from multiple units or the PI has a joint appointment, the Associated Department will need to be added in order for the investigator’s associated unit heads/administrators to view the proposal.

• To add associated departments (i.e. CCT, CAMD, joint appointments, etc.), click Show on top right. NOTE: Show button is only available to Department Administrators and OSP.

• If the PI has a joint appointment, click Add next to PI Departments.
- This field is progressive text and you only need to enter part of name to populate. Click Select.

![Department Select](image)

- You will then see a toggle by the PI Departments. The unit that is marked will be the Primary Department for the proposal and any resulting award. Select and then click Save in top Left.

**TIP!**  
The Primary Department will administer the award in Workday.

![Primary Department Selection](image)

- Click Add to add the additional Associated Departments.

![Add Associated Departments](image)

- This field is progressive text and you only need to enter part of name to populate. Click Select.

![Department Select](image)

**TIP!**  
You must click Show each time you add a unit to add additional units.
LSU Questionnaire

These questions are similar to the SPS Coversheet. This is where we capture compliance, budget and specific information about your proposal. This is where we will record Investigators for F&A & Project % Credits.

- Answer all mandatory questions. Yes answers may include a prompt for additional information. Click Save at any point to preserve all data entered. Clicking Completed will validate form.

Make sure to answer correctly before routing as many of these questions trigger an approval step in the route.
• Investigators % F&A Distribution & % Project Credit (#26):

• **Step 1**: You will enter the Investigator Name, Role, Department, and %. If an investigator has a joint appointment and required to split his/her credit between units, you will need to enter them twice. To add additional investigators or departments click the Add button.

![Investigator Input Form]

• **Step 2**: To enter the Investigator Name or Department, click the pencil icon. For Department, begin typing the cost center name in Find Department. Once it appears, click on unit name and then click Select.

![Departments Search]

**TIP!** If you do not know the name of your Workday Cost Center. Go to Workday, and type the Cost Center number in the Search bar to display the Cost Center name used in GeauxGrants.

![Cost Center Search]

• After you answer all mandatory questions, click Complete. Checking the Complete box will perform Validations. Click Ok on pop-up box to show errors.
Budget

See separate user guide for Creating a Detailed Budget.

**Note:** If a sponsor requires the use of the sponsor’s budget template then a simplified budget may be entered in GeauxGrants. Follow the instructions for Creating a Simplified Budget.

Personnel

All personnel listed on the detailed budget will populate on this tab. If you enter individuals on the Personnel tab, that person will automatically populate on the Budget tab and vice versa.

- To add investigators, type in their name, choose role using the dropdown, begin typing name, and click Save.

- If you created a detailed budget, effort from the budget will automatically populate on the Personnel tab. If you created a Simplified budget, you will enter senior personnel effort on the Personnel tab. Click the lock button next to Person Months to edit.
• Type in the annual effort (requested + cost shared). If the effort varies each year, type in the average. Click Save.

• The Responsible column indicates who is an Investigator per PS-98 for Financial Conflict of Interest. PD/PI and Co-PD/PI are automatically checked. All LSU PI and Co-Investigators should be checked. Indicate other responsible investigators by clicking the checkbox by their name.

• COI column will either have a green check, yellow sign, or red question mark.
  • If green check mark appears, a Significant Financial Interest (SFI) disclosure has been “Received in GeauxGrants.”
  • If red question mark appears, a SFI disclosure has either been “Created; No Disclosure” or there is “No Current Disclosure”. SFI needs to be submitted.
  • The Legend describes who is on the Prime and who is on the Subaward.

• If Investigator information needs to be updated, click on the individual’s name and enter the information in the profile for this record.
• Check Complete when done. Complete must be unchecked before editing the information.

Internal Uploads & Routing

All documents for OSP review are uploaded here. Follow instructions at the top of the page.

• **Step 1**: Click Add Institution Forms/Supporting Documentation to upload documents.

• **Step 2**: After completing all previous tabs (checkmarks on left navigation), user must open both LSU Questionnaire and the Review Summary to Complete/Lock these forms.
- **Step 3**: To route proposal for review and approvals, click the thumbs up icon by Submit Pre-Review. This step must be completed seven (7) business days before the deadline for OSP to submit the proposal.

  - **Pre-Review Route**: Route Proposal Submit Pre-Review

- **Step 4**: Click Accepted and then Continue.

- **Step 5**: If units receiving Investigator Credit are not included in the Route, follow the steps below:
  - **Step 5a**: Insert route after Step 14

    **TIP!** Make sure to click on insert icon after Step 14. Do not click on Add new Person to Review Path. This button inserts the person at the beginning instead of the end of the route and prevents OSP from being notified of proposal.
- **Step 5b**: Type Name of Investigator, choose Approval Required and click Add. Newly added Investigator will be added to the Route and a notification will be sent for his/her review and approval.

![Add step](image)

- **Step 5c**: Inserted Investigator will appear after Step 14. Click Submit in top right to route the proposal.

![Proposal AM210067 - (L13) Mike the Tiger "Sample Proposal" (Pending)](image)

- After proposal is routed, list of required approvals will appear at the bottom of the screen.
- The current status is shown at the top of the documents.
- Click the Scroll to see the Route History.