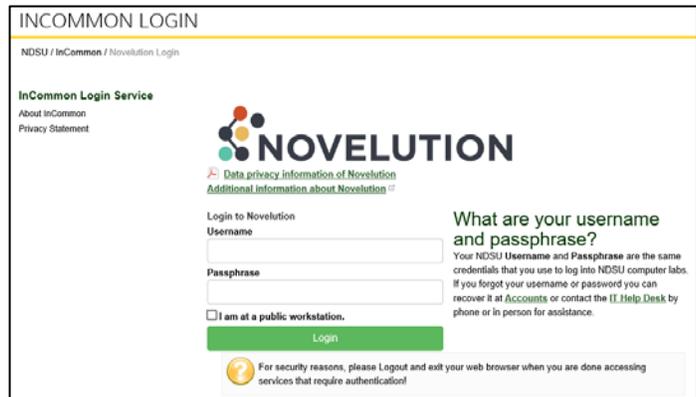
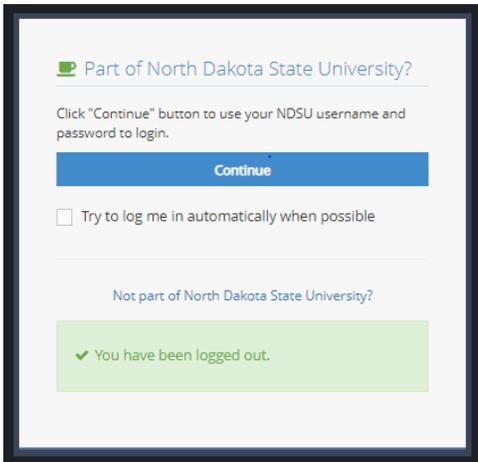


# Electronic Proposal Routing – Novelution Help Guide

## Signing into Novelution

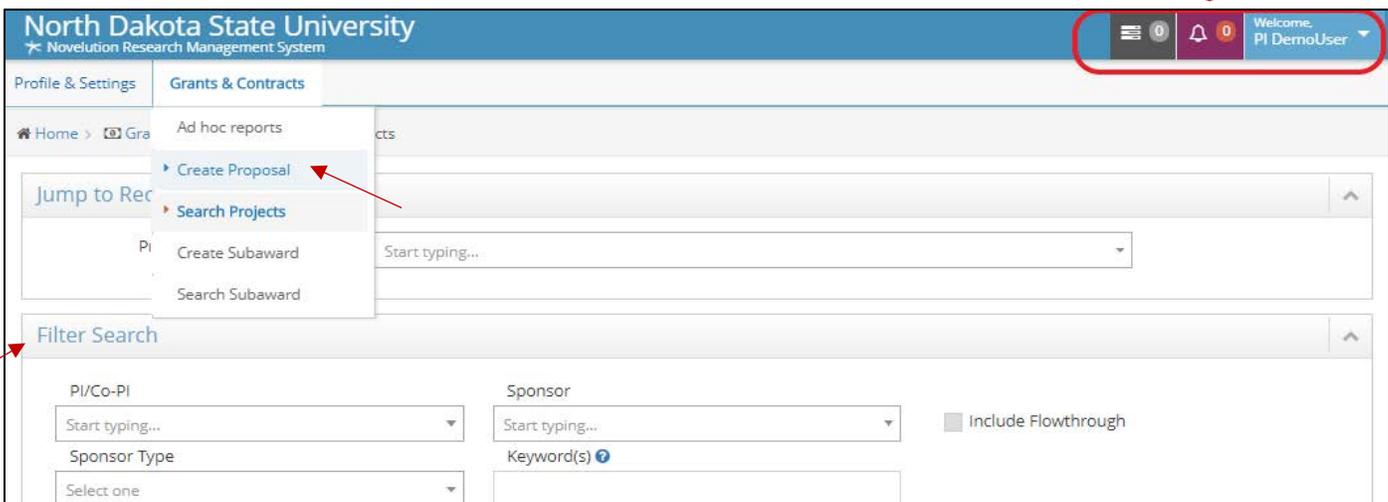
- Web address: <https://erac.ndsu.edu>
- Click blue “continue” button
- Enter NDSU Username and Passphrase
- Complete Duo Authentication



## Landing Page

- Search for your proposals and awards using “Search Projects” or “Ad hoc Reports”
- Create a proposal by clicking on the Grants & Contract tab and select “Create Proposal”
- Find your Tasks and Notifications in the top right blue header bar
  - Tasks are listed in the first box and are items to be completed
  - Notifications are listed in the second box and are for informational purposes only

Tasks and Notifications



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## Search for Proposals and Awards

- All proposals processed through Sponsored Programs beginning 7/1/2019 have been entered into Novelution.
- All active awards are entered into Novelution and any awards closed after 11/1/2019 are also in the system.
- Search Projects Page
  - By default only a users pending proposals and active awards display in the search results. To include proposals that weren't funded or awards that are closed, click on the "include inactive records" box on the filter search page.
- Ad Hoc Reports Page
  - By default this page includes all proposals and awards for the user.

---

## Create Proposal Page

- Enter Project title (PI name and primary department will auto populate).
- The Primary Department a proposal is being submitted under can be changed by using the dropdown selections on this page.

North Dakota State University  
Novelution Research Management System

Welcome, PI DemoUser

Profile & Settings Grants & Contracts

Home > Grants & Contracts > Create Proposal

### Create Proposal

**Primary Information**

Title   
200 remaining

PI\*

Project Department\*   
Project Department

Sub-Project Department   
Deans Office, Science & Math > Mathematics

**CONTINUE**

- To change your default department for all proposals submissions:
  - Navigate to "Profile and Settings" tab, select "Edit User Profile" and scroll to "Positions/Units"

Positions/Units

Default Lead Project Department  
Department/Unit

## Main Proposal Page

- Complete each panel section and click on the blue “submit for approval” button to begin proposal routing.
- **At this time, send an email to any CO-PI’s, Chair/Director/Dean associate with your proposal that you have submitted a proposal through Novelution and it is ready to be electronically reviewed and approved.**

North Dakota State University  
Novelution Research Management System

Profile & Settings | Grants & Contracts

Panel shortcuts  
collapse all | expand all

NOV0002680: / PI DemoUser

Home > Grants & Contracts > Edit Sponsored Research

collapse all | expand all | Save record as PDF

Primary Information

Project ID: NOV0002680

Title\*

200 remaining

Proposal Type\*  New  Supplemental

Sponsor & Submission Information

Screening Questions

Compliances

NDSU Personnel

Subawards

Budget

Proposal Uploads

Connected Records

Email Contacts

PI attestation

Workflow & History

powered by Novelution Research Management System (v.2018)

collapse all | expand all

SAVE | SUBMIT FOR APPROVAL | Check Validations | Request Budget pte-revisv

## Tips

- Work through each Panel, completing the information requested.
- **Red asterisks** indicate a required field and must be completed. (Note: Every field is required in the Screening Questions and Compliances Panels.)
- Hover your mouse over a **blue question mark symbol** in panels to view additional guidance.
- Each panel header has a **gray check mark box**. When a panel is complete, click the gray check mark to indicate the panel is complete. A **green check mark** will then appear in Panel Shortcuts in the left navigation sidebar.
- Clicking on the green **“Check Validations”** button at any time will provide a list of fields that still need to be completed. It is recommend to always select “Check Full Validations”. A **red symbol** will appear next to incomplete panel(s) in the Panel Shortcuts menu to assist in locating the incomplete fields.
- When clicking the **“View/Edit”** button in the budget panel, an additional modal appears and has a **separate “Check Validations”** button at the bottom of the page.
  - While in the budget modal, you can choose to upload an external budget.
- It is necessary to **SAVE** your proposal as you complete it, as navigating away from the page may result in losing changes that have been made. **SAVE often!**

## PI Attestation and Submit for Approval

- Prior to clicking “Submit for Approval”, the Proposal PI must sign in to Novelution and complete the PI attestation Panel. This panel is not visible or editable by anyone other than the PI.

^ PI attestation

I, PI DemoUser, attest to the role as Principal Investigator in project and that the information is correct?

Do you have an economic interest in, receive compensation from, or act as an officer or director of any outside entity involved in this proposal?  Yes  No

Do you plan on working with, or entering into a financial transaction with your spouse, domestic partner, child, parent, sibling or in-laws for this proposal?  Yes  No

To the best of your knowledge, are there any immediate familial relationships between any personnel, subcontractors, subawardees or vendors?  Yes  No

- After PI attestation, the proposal can be submitted for routing anytime by the PI or a Department Administrator by selecting one of the two options below:
  - Submit Administrative Portions for Review
    - The Proposals Upload panel remains unlocked but all other proposal panels are locked.
  - Submit Full Proposal
    - All proposal panels are locked and are read only

Submit Administrative Portions for Review

Submit Full Proposal

## Workflow & History

- The Workflow & History Panel provides a listing of all of the internal approvals that need to be completed prior to a proposal being ready for submission to a sponsor. **Requirements in this panel update automatically as approvals are completed during the routing process**, some of these may be completed simultaneously.
- A Completion State of “Ready” indicates a requirement is ready to be completed, a Completion State of “Not Ready” indicates prior requirements need to be completed first and a Completion State of “Completed” indicates a requirement is finished.

Workflow & History

Stage - Revision #	Created	Current Status	Status Date	Notes
Proposal - revision #1.1 <a href="#">Viewing</a>	03/22/2020 5:50 PM	New Proposal Record Created	03/22/2020 5:50 PM	

Status	Requirement	Completion State	Revision	Completed by	Completed Date
New Proposal Record Created	Release administrative portions of proposal for review	Ready			
	PI attestation: PI DemoUser	Ready			
Internal Review and Approvals	Approval by Department Chair:	Not ready			
	Approval by College Dean:	Not ready			
Institutional Review & Approval	BPD Review	Not ready			
AOR Approval	AOR Approval	Not ready			
	Release full proposal application for review	Ready			
Ready to Submit to Sponsor	Submission by SPA	Not ready			
Proposal Submitted to Sponsor					

Budget Pre-Review

collapse all | expand all

## Co-PI Attestation

- All Co-PI's associated with the proposal must sign in to Novelution and complete a CO-PI Attestation

collapse all | expand all

Attestation Form

- Primary Information
- Review Notes
- Sponsor & Submission Information
- Screening Questions
- Compliances
- NDSU Personnel
- Subawards

Attestation Form

Attestations

I, \_\_\_\_\_, attest to the role as Co-PI in project and that the information is correct\*

Do you have an economic interest in, receive compensation from, or act as an officer or director of any outside entity involved in this proposal?\*

Do you plan on working with, or entering into a financial transaction with your spouse, domestic partner, child, parent, sibling or in-laws for this proposal?\*

To the best of your knowledge, are there any immediate familial relationships between any personnel, subcontractors, subawardees or vendors?\*

Submit

## Chair/Director/Dean Approvals

- All Chair/Director/Dean Proposal Approvals in the Workflow & History Panel must sign in Novelution to review and approve a proposal

Approval Form

- Primary Information
- Review Notes
- Sponsor & Submission Information
- Screening Questions
- Compliances
- NDSU Personnel
- Subawards
- Budget
- Proposal Uploads
- Connected Records
- Email Contacts
- Workflow & History

Project Summary

PI	-100.0% (Project Credit)
Co-PI(s)	
-0.0% (Project Credit)	

Direct Sponsor

Title

Project Dates 7 - ?

Total Direct

Total Indirect

Total Budget

See Full Detailed Budget: Initial Budget

See Project Summary: Initial Proposal Uploads

Approval

Please review the Sponsor Project.

Please review the below proposal.

If you approve this application, please enter your initials in the box below. If modifications are required, please describe them below:

Status\*  I have reviewed and approve this proposal.  Modifications required.

Submit

- The review "Status" in the "Approval Form" should be updated to one of the following:
  - If no changes are needed to proposal: Select "I have reviewed and approved this proposal", enter initials and click on "submit"

Status\*  I have reviewed and approve this proposal.  Modifications required.

Initialize\*

Submit

- If changes are needed to proposal: Select "Modifications Required", enter a description in the details window and then click "submit". The proposal is routed back to PI for further changes, and then resubmitted back for approval.

Status\*  I have reviewed and approve this proposal.  Modifications required.

Details\*

Submit

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## Sponsored Programs Review and Approval

- Budget and Program Officer Review and Approval:
  - As soon as a proposal has been approved by all individuals listed in Workflow “Internal Review and Approval” section, it will route to the Sponsored Programs Budget and Program Officers. One of the Budget and Program Officers will enter their name in the “Assigned BPO” field, will review the budget and completed Novelution fields and then will either route the proposal back to the PI for proposal modifications and resubmission or will approve proposal.

Primary Information

Project ID	NOV0001095
Title*	
Proposal Type*	
Assigned BPO (Proposal)	Miller, Victoria Jolene

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Period of Performance

Start Date	07/01/2020
End Date	06/30/2022

- AOR Approval:
  - One of the Sponsored Programs Authorized Organizational Representatives (AOR) will review and approve proposal.
- Accessing SPA Signed Documents:
  - Any documents uploaded by PI under “Documents Requiring SPA Signature” will be signed and then uploaded under “SPA Signed Documents”
  - **SPA signed Letter of Intent/Cover Letter:** To download a cover letter signed by SPA, click on “Generate Standard NDSU Cover Letter”.

Cover Letter

Letter of Commitment type\* I need a standard version x v

Generate Standard NDSU Cover Letter

Download Standard NDSU Cover Letter Download PDF

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## Help

If you need assistance, please email [ndsuhelp@ndsuh.edu](mailto:ndsuhelp@ndsuh.edu), identifying the Panel you are working in and the question(s) you have. SPA staff will get back to you as quickly as possible.