ORS Support:

- If needed, ORS staff can come to an individual faculty member's office to help them navigate thru the process and get their proposals developed in the myGRANT system. In addition, ORS Helpline has acquired a remote desktop support system which will enable Helpline staff to walk you through the myGRANT process by looking at your screen. With the remote desktop support tool, ORS Helpline will be able to help myGRANT users more effectively without physical boundaries. Please contact the ORS Helpline at helpline@ors.hawaii.edu or (808) 956-5198 for details if you are interested.

- We would like to remind users that the online training modules are always available 24/7 on our website. The structure of the online training tailors the information to different types of proposal submissions. All you need to do is follow this link: https://laulima.hawaii.edu/autoenroll/?mygrant. If you are currently logged into Laulima you will be automatically added to the course. If you are not logged in you will be prompted for your Laulima username/password (UH username/password) and once you successfully login you will be added to the course. From that point on, "myGRANT" will be available as one of your course tabs after logging into Laulima at http://laulima.hawaii.edu.

- We have been working with the Kuali Foundation and its partner schools to enhance the system. Many fixes and S2S enhancements were implemented when we upgraded the system to 3.1.1 last April. We and the Kuali Foundation are aware of the issues with the user interface. Improving the User Interface (UI) on myGRANT is already on the KC enhancement list and our highest priority. We will continue to work with you all to improve the system.

General Hints:

- Finish all FastLane entries before starting myGRANT.
- Budget should be solid – narrative and summary can be modified later but should be near-finished.
- For FastLane, give ORS access to view [and maybe edit] but not submit. Print entire proposal to PDF.
- Login to myGRANT via the ORS website [http://www.ors.hawaii.edu]. Select Create Proposal towards top left of screen.
- When searching for text in a given field in myGRANT, use * as a wildcard (e.g., *Forest* to search for Forest Service in the sponsor code lookup)
Before moving from one tab/page to the next, save to see if any errors are populated (if errors do exist, you will not be able to go to another tab until you fix them without logging out and logging back on again).

Be patient.

Proposal:

- Give useful Description (e.g., “NSF Seamount proposal”), title, and select type (e.g., new).
- Enter sponsor code 02400X (NSF – you can always search for this.), and project start/end dates. Activity type is likely “Research”.
- Enter Deadline and Type (Receipt), Notice as “unsolicited”.
- Select primary performance site (I choose same as applicant since hard to search for one’s office – but that would be OK). You can fill in using lookup (use wildcard *).
- Required fields: Type, Lead Unit, Activity Type, Project Title, Sponsor Code, Project Start Date, Project End Date.

Key Personnel:

- Add the PI and co-PIs, their units, and RTRF splits. Note: HIGP is unit MA1584.
- Add Person(s): For each person added, Delegate RTRF allocation (% to sum to 100%), Describe effort dedicated to project (approximate % time contribution to project), and fill in ‘UH Proposal Person Certification’.
- For non-UH Co-PIs, they do NOT need to be added as Key Personnel, but commitment letters must be uploaded in the Abstract and Attachments tab.

Special Review:

- Only if UNOLS form is used. Add “The proposal includes a UNOLS Ship Time Request, and the National Science Foundation and the University-National Oceanographic Laboratory System, of which UH is a member organization, will provide guidance on which of the federally-supported UNOLS research vessels will be available for this project. At the time that determination is made, if the vessel scheduled is not the University of Hawaii vessel R/V Kilo Moana (which is on the UH list of insured and inspected vessels), then we will obtain confirmation from the operator that the vessel is insured and operated in compliance with University of Hawaii guidelines.”

Custom Data:

- Y for Responsible Conduct of Research and probably N for the rest.

Abstracts and Attachments:

- Upload the Fastlane PDF as type “Sponsor Application Package” and paste in summary page in the Abstract field. Add comments.descriptions as suitable.
- Proposal Attachments: At a minimum, upload Narrative, Budget (as ‘Other’ with description), Budget Justification, etc. as needed
For NSF or Grants.gov, just upload the entire application package as one document

*Internal Attachments:* If there are non-UH Co-PIs, upload commitment letters here

*Abstract:* Type (or paste) brief abstract (along the lines of ORS Form 5 abstracts; 1-2 sentences, broad and unscientific) as “Project Summary”

**Questions:**

- Answer Self-explanatory questions. Note if non-GG co-PIs, add ad-hoc approvers. Ship time needs a yes. #14 sponsor deadline time, add 5 pm HST.
- Answer all questions in ALL 3 tabs.

**Budget Variations/versions:**

- Give Name (e.g., Final), “Add”, and then “Open”
- For each year, as applicable provide Total Sponsor Cost, Direct Cost (same as TSP if no IDC), F&A (i.e., IDC), Unrecovered F&A (if IDC limited to below typical; do NOT list when IDC is not allowed (e.g., RJVAs)), and Cost Sharing
- *Distribution and Income (Only required if Cost Sharing or Unrecovered F&A involved)*
  - Cost Sharing: 100% of any year with Cost Sharing; In ‘Source Account’, write “Required by Sponsor” (or something like that) for ALL years
  - Unrecovered F&A: For each year, in ‘Source Account’, write “N/A”, provide amount for each year, and delete on/off campus rows as needed
- *Parameters:* Check ‘Final’ and choose ‘Complete’, and Save to check for errors

**Permissions:**

- Perhaps add permissions to other people to help with budget, narration, etc. I did not use it.

**Finishing up:**

- When done with filling in, turn on Data Validation, and fix all errors. When no more errors, turn off validation, then click SUBMIT button. This starts routing and you will get email to approve your own proposal. Click on link in email, possibly select Proposal Action tab, and look for APPROVE button at the bottom of the screen.
- When asked if you want to see future approvals, choose “No”
- Check Action List to make sure that no approvals are required on your part (regardless of how you answered the prior question).
- Once it goes through the approval process there may be minor snags and feedback for corrections by fiscal, etc. Just follow orders.
- Meanwhile, continue to work on narratives and upload to FastLane as needed. Release in FastLane for ORS to submit when ready.
- Go home and drink a beer to congratulate yourself for making it through this system.