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
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 user's 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.

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

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.

- 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

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.
Co-PI Attestation

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

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

- 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”
  - 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.
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.

- **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”.

**Help**
If you need assistance, please email ndsu.novhelp@ndsu.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.