

## SC EPSCoR/IDeA Proposal Submission Portal

<https://scepacoridea.org/Solicitations/portal>

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### INTRODUCTION

The SC EPSCoR/IDeA Program developed this portal to assist Principal Investigators with the construction and submission of the final proposal document. This User’s Guide demonstrates the steps that users can follow to upload proposal sections, review the proposal as one complete document and submit it to the SC EPSCoR for Consideration. SC EPSCoR offers several funding programs throughout the year and the requirements for each solicitations varies. The applicants should familiarize themselves with the specific requirements of each solicitation (offer).

This guide has several screen shots (sometimes partial) to illustrate the various steps. *The IMPORTANT NOTE section of this guide is a must read!*

The proposal submission portal has the following major functions:

- **Upload proposal requirements** (The term “requirement” refers to a section of the proposal, such as the Project Description section or the Budget section, etc.). Each section should be uploaded separately. For solicitations that require or allow multiple institutions or Co-PIs, sections such as the Budget, budget justification, biographical

sketches and List of Conflicts can be uploaded as multiple files. The order in which these files appear in the final proposal can be later rearranged by the user.

- **Download the proposal** as a single combined PDF with a table of contents and page numbers. The resulting file is a combination of the uploaded requirements that can be used to proof or save a copy of the full proposal. This is the document that will be used by the proposal evaluators.
- **Generate a report** to determine if the files have been uploaded as planned. This provides a table to compare what should be uploaded vs. what has been uploaded and identifies any missing files.
- **Submit the Proposal** to the SC EPSCoR/IDeA program. This is the official submission of the proposal.
- **Edit the Proposal** function allows the user to go back and make changes to the proposal after it has been submitted. This function withdraws the proposal submission. *Remember to re-submit the proposal.*

The proposal sections of solicitations may vary. For example, the most extensive solicitation offered in the past couple of years is the “2017 Stimulus Research Program” and it serves as a comprehensive offer with a variety of requirements that are shown in the table below to explain several important points. Other solicitations typically have fewer requirements.

The following table shows the requirements for a solicitation as well as the number of files allowed for each requirement. Each of the 13 requirements listed below should be uploaded as a PDF file. However, for the requirements that allows more than one file, such as biographical sketches, the requirement can be uploaded as one PDF file that contains all the individual biographical sketches, or as multiple PDF files with each sketch uploaded as a PDF file.

Requirement	# of Files Allowed
1. Cover Page	1
2. Project Summary	1
3. List of Collaborators/Participants	1
4. Project Description	1
5. Collaboration, Inclusion, Mentoring and Sustainability Plan	1
6. Plans to Increase Research Capabilities and Competitiveness	1
7. References	1
8. Biographical Sketches	>1
9. Budget and Budget Justification	>1
10. Cost-share Letter of Commitment	1
11. Facilities, Equipment, and Other Resources	1
12. Current and Pending Support	>1
13. List of Conflicts	>1

Users (applicants) should not combine requirements into one PDF file. For example, proposals that combine the Cover Page with the Project summary, or any other combination of requirements will be returned to the applicant and will not be considered for possible funding.

## IMPORTANT NOTE

1. Only PDF files can be uploaded.
2. DO NOT upload fillable PDF files without first “printing” them as pdf files. To upload a fillable pdf file, print the file as a pdf, then upload the printed file. A scanned copy of a fillable PDF file may be uploaded.
3. The largest file size that can be uploaded is 8 MB.
4. The Proposal Submission Portal will not be accessible after the announced submission deadline (date and time). No proposals will be accepted after this date and time.
5. Refreshing the browser will cause the action to be done again. So, if a file is uploaded and immediately the browser is refreshed, then the same file will be uploaded again, and a duplicate of the file will appear in the table of uploaded files.
6. For assistance, please use the help button to send a request for help.

## PORTAL REGISTRATION

Registered users of the SC EPSCoR Portal may log in to the portal by entering their email address and password at <https://scepscoridea.org/Solicitations/portal>. By entering the email address without a password, the user will receive an email with a temporary password.

Users who are not registered may do so by going clicking the link above and follow the instructions on the screen to register, then complete all information requested. A temporary password will be sent to the email address entered. *Unfortunately, sometimes these emails end up in the junk mailbox!*

### SC EPSCoR/IDeA

[Help](#)

#### SC EPSCoR Portal Login

Enter your registration email address and password.

Email:  Password:

If you have not registered for an offer for funding or to contribute to the annual report, [please click here to register](#).  
Forgot your password? Login with email address and a blank password. If you are registered, you will receive an email with a temporary password.

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View PDF of a [Brief Proposal Submission Users Guide](#).  
View PDF of a [Brief Reporting Users Guide](#). For additional assistance, please submit a [Help Request](#).  
Maintained by [SC EPSCoR/IDeA](#). Last Revised: August 9, 2018.

To complete the registration, the temporary password must be changed within 72 hours as follows:

- Follow the link given in the email
- Enter the email address and the temporary password
- Change the password as instructed
- then login.

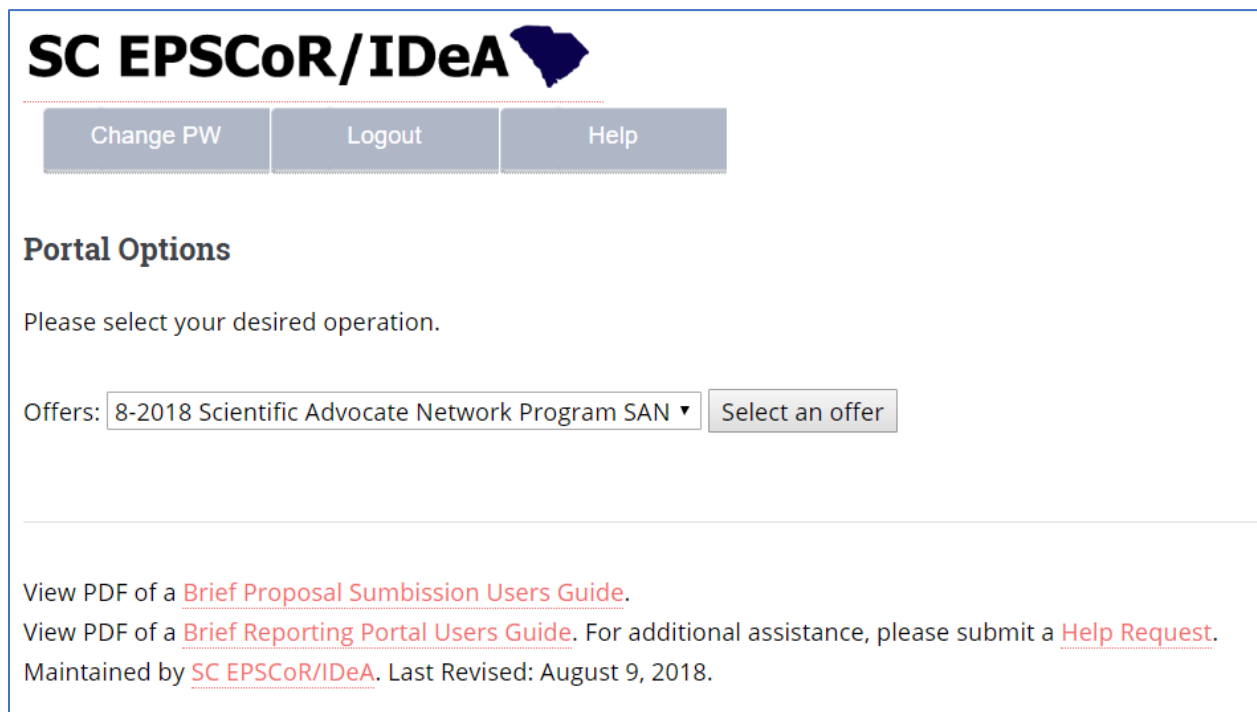
Users may create different account to access the portal as follows:

- By using the same email address but with a different password, or
- by using a different email address.

## SELECTING OFFERS

After logging in to the Portal, the user will be directed to a page that lists all available operations for this specific user depending on the roles the user plays in various EPSCoR projects. For example, if a user is a member of the MADE in SC project, the user will be presented with two possible operations: one is related to the available offers, such the SAN, GEAR opportunities; and the other is related to the reporting part of the Portal dealing the MADE in SC project.

For a new user, only the list of offers available will be displayed. These will be in a drop-down menu. The screen caption below shows the SAN program as an available solicitation (offer).



The screenshot displays the SC EPSCoR/IDeA portal interface. At the top left, the logo "SC EPSCoR/IDeA" is shown with a blue outline of South Carolina. Below the logo are three buttons: "Change PW", "Logout", and "Help". The main heading is "Portal Options", followed by the instruction "Please select your desired operation." Below this is a dropdown menu labeled "Offers:" with the selected option "8-2018 Scientific Advocate Network Program SAN" and a "Select an offer" button. At the bottom, there are links for "Brief Proposal Submission Users Guide", "Brief Reporting Portal Users Guide", and "Help Request", along with the text "Maintained by SC EPSCoR/IDeA. Last Revised: August 9, 2018."

In the event more than one offer is available, the drop-down menu will list those in the order in which they were released by the SC EPSCoR Office.

## OFFER MAIN PAGE

Selecting an offer will lead to the offer's main page. This page (shown below) contains all the functions necessary to upload, review and submit a proposal.

### SC EPSCoR/IDeA

Portal | Change PSWD | Logout | Help

#### 8-2018 Scientific Advocate Network Program SAN

**Download** Download and View a Combined PDF of the Proposal.

**Submit** WARNING: Submitting the proposal terminates your ability to make changes.

**Generate Report** Compare requirements vs. uploaded files.

#### Download Blank Forms for This Solicitation

- Cover Page Form - <https://tinyurl.com/SAN2018-AppendixA>
- Budget Sheet Form - <https://tinyurl.com/SAN2018-AppendixB>

#### Proposal

Principal Investigator: Jane Smith  
Please enter the title of your proposal and up to 5 keywords.

Proposal Title:

Keywords:

**Save**

#### Upload Proposal Files

Please select a requirement. A brief description will appear below. Upload files in PDF format only. For more details, click the offer title above.

Requirement:  Upload PDF File:  No file chosen

Requirement: Uploaded scanned PDF file only. Do not upload the fillable Appendix A unless it is a scanned copy with signatures.

The offer main page has several sections as follows:

- The top part of the screen shows the name of the offer which provides a link to the solicitation, and a list of functions (Download, Submit, and Generate Report) related to the proposal.
  - The Download function combines all PDF files into one file that can be reviewed, downloaded or printed. The combined PDF file contains a table of content. This is the file that will be sent to the external reviewers.
  - The Submit function should be used when the proposal files have been uploaded and reviewed. The Submit function generates an email to the user indicating that the proposal has been submitted to the SC EPSCoR Office for consideration. When the proposal is submitted, an Edit Proposal function replaces the Submit function. This will allow the user to withdraw the proposal to make further edits.

- The Generate Report function presents two tables showing what the user has uploaded in comparison to the requirements. This function can help the user identify what's missing before submitting the proposal.
- B. The next set of information on the offer main page is the list of Appendices (forms) that should be used by the applicant. In the example of the SAN program shown in the figure above, there are two forms that are required: The cover sheet and the budget sheet. The links shown should be used to download these forms.
- C. The Proposal section of the main page defines the various components of the proposal. First, the user should enter the proposal title and keywords. Keywords should be selected to accurately represent the proposed work. After saving this information, the user will have the option to update it as needed.
- D. The bottom portion of the main page is to upload proposal files. This process is described in the next sections.

## UPLOADING PROPOSAL FILES

To upload the proposal files, select a requirement, such as: “1. Cover Page” as shown below in the partial image of the screen, then

Click “Choose file”

Select the PDF file from a directory on the computer

Click “Load File”

The file will then be uploaded and the file name will appear in a table. This table is called the Requirements Table. Repeat this process to upload the other requirements.

The following partial screen shot is a sample of what will be displayed in the Requirements Table after requirements 1 through 4 have been uploaded. *Note the delete function to delete an uploaded file.*

**Upload Proposal Files**

Please select a requirement. A brief description will appear below. Upload files in PDF format only. For more details, click the offer title above.

Requirement: 4. Results from Prior SC EPSCoR Support ▾ Upload PDF File:  No file chosen

Requirement: Upload no more than 1 page per SC EPSCoR Award

**File Results of previous funding.pdf has been loaded.**

Action	Requirement	File Name	Size	Loaded
<a href="#">Delete</a>	1. Cover Page	<a href="#">Cover.pdf</a>	77.8KB	2018-08-08 16:05:28
<a href="#">Delete</a>	2. Project Description	<a href="#">Project Description.pdf</a>	1.8MB	2018-08-08 16:07:27
<a href="#">Delete</a>	3. References Cited	<a href="#">References.pdf</a>	118.4KB	2018-08-08 16:12:19
<a href="#">Delete</a>	4. Results from Prior SC EPSCoR Support	<a href="#">Results of previous funding.pdf</a>	77.8KB	2018-08-08 16:12:39

If the above is followed but the file does not upload properly, the following should be investigated as reasons:

1. The file is not a PDF file. Only PDF files should be uploaded.
2. If the file is a PDF file, then it should not be a fillable form. A fillable PDF can be uploaded after it has been “printed” as a PDF file or as a scanned copy (as a PDF). Users should avoid uploading scanned PDF files as much as possible since their quality is usually not as good as a printed PDF file.
3. If the file size is larger than 8M, it will not upload correctly. In this case, the file should be reduced in size, or it be broken into smaller-sized files then these files can be uploaded and placed in the correct order.



## UPLOADING REQUIREMENTS THAT ALLOW MULTIPLE FILES

Depending on the solicitation, some offers allow multiple files to be uploaded for a single requirement. This is common for offers that require collaboration among institutions, such as the Stimulus Research Program or the GEAR CRP program. The requirements that allow multiple files are related to budgets and biographical sketches, among others.

For example, using the biographical sketches requirement to demonstrate this scenario,

- All biographical sketches may be combined into one PDF file and then uploaded as one file, or
- Each investigator’s biographical sketch can be uploaded one PDF file at a time using this requirement. The screenshot below shows multiple files uploaded to meet the biographical sketches requirement. To re-arrange the order in which multiple files of the same requirement appear, see the “Reorder Files Loaded” section below.

### Upload Proposal Files

Please select a requirement to review the brief description of the requirement. For more details, click the offer title. Only load files in PDF format.

1. Cover Page Upload PDF File:  No file chosen

Requirement: Upload scanned pdf file only. Do not upload the fillable Appendix A unless it is a scanned copy with signatures.

Action	Requirement	File Name	Size	Loaded
<a href="#">Delete</a>	1. Cover Page	<a href="#">Signed Cover Page.pdf</a>	31.1KB	2017-08-09 07:50:37
<a href="#">Delete</a>	2. Project Summary	<a href="#">Project Summary.pdf</a>	69.1KB	2017-08-09 08:06:09
<a href="#">Delete</a>	3. List of Collaborators/Participants	<a href="#">List of Collaborators-Participants.pdf</a>	31.1KB	2017-08-09 07:51:07
<a href="#">Delete</a>	4. Project Description	<a href="#">Project Description.pdf</a>	1.0MB	2017-08-09 08:06:20
<a href="#">Delete</a>	5. Collaboration, Inclusion, Mentoring and Sustainability Plan	<a href="#">Collaboration Inclusion.pdf</a>	31.1KB	2017-08-09 08:06:44
<a href="#">Delete</a>	6. Plans to Increase Research Capabilities and Competitiveness	<a href="#">Plans to increase SC.pdf</a>	31.1KB	2017-08-09 08:07:05
<a href="#">Delete</a>	7. References Cited	<a href="#">References.pdf</a>	101.6KB	2017-08-09 08:08:33
<a href="#">Delete</a>	8. Biographical Sketches	<a href="#">Lead PI Bio.pdf</a>	84.9KB	2017-08-09 08:08:43
<a href="#">Delete</a>	8. Biographical Sketches	<a href="#">Co-PI Smith Bio.pdf</a>	83.1KB	2017-08-09 08:09:05
<a href="#">Delete</a>	8. Biographical Sketches	<a href="#">Co-PI Fun Bio.pdf</a>	83.1KB	2017-08-09 08:11:11
<a href="#">Delete</a>	8. Biographical Sketches	<a href="#">Co-PI Happy Bio - Copy.pdf</a>	84.9KB	2017-08-09 08:08:51
<a href="#">Delete</a>	8. Biographical Sketches	<a href="#">Co-PI Brown Bio.pdf</a>	83.1KB	2017-08-09 08:09:49
<a href="#">Delete</a>	8. Biographical Sketches	<a href="#">Co-PI Joy Bio - Copy.pdf</a>	84.9KB	2017-08-09 08:10:47

The same process can be applied to all requirements that allow more than one file to be uploaded. For example, if allowed, Budget and Budget Justification requirements may also be uploaded as multiple files (shown below) or as a single file.

<a href="#">Delete</a>	8. Biographical Sketches	<a href="#">Co-PI Joy Bio - Copy.pdf</a>	84.9KB	2017-08-09 08:10:47
<a href="#">Delete</a>	9. Budget and Budget Justification	<a href="#">Lead Univ Budget.pdf</a>	104.5KB	2017-08-09 08:19:50
<a href="#">Delete</a>	9. Budget and Budget Justification	<a href="#">Univ-2 Budget.pdf</a>	93.5KB	2017-08-09 08:12:57
<a href="#">Delete</a>	9. Budget and Budget Justification	<a href="#">Univ-3 Budget.pdf</a>	93.5KB	2017-08-09 08:13:10
<a href="#">Delete</a>	9. Budget and Budget Justification	<a href="#">Univ-4 Budget.pdf</a>	93.5KB	2017-08-09 08:13:15

## REORDERING REQUIREMENTS THAT HAVE MULTIPLE FILES

For requirements with multiple files, such as budget and budget justification, biographical sketches, etc., click the “Reorder Files Loaded” button to put the files in the desired sequence. A desired sequence may be to order biographical sketches in alphabetical order, or to put the PI’s sketch first followed by the Co-PIs. The image below shows an example of the “ordering” table.

Only the requirements that have multiple files loaded are shown. Enter integers in the textbox for each row to indicate the new sort order. Note that files are only sorted within each requirement group. Click the Sort button to save your changes.

Order	Requirement	File Name	Size	Loaded
First Name: <input type="text" value="1"/>	8. Biographical Sketches	<a href="#">Lead PI Bio.pdf</a>	84.9KB	2017-08-09 08:08:43
First Name: <input type="text" value="2"/>	8. Biographical Sketches	<a href="#">Co-PI Smith Bio.pdf</a>	83.1KB	2017-08-09 08:09:05
First Name: <input type="text" value="3"/>	8. Biographical Sketches	<a href="#">Co-PI Fun Bio.pdf</a>	83.1KB	2017-08-09 08:11:11
First Name: <input type="text" value="4"/>	8. Biographical Sketches	<a href="#">Co-PI Happy Bio - Copy.pdf</a>	84.9KB	2017-08-09 08:08:51
First Name: <input type="text" value="5"/>	8. Biographical Sketches	<a href="#">Co-PI Brown Bio.pdf</a>	83.1KB	2017-08-09 08:09:49
First Name: <input type="text" value="6"/>	8. Biographical Sketches	<a href="#">Co-PI Joy Bio - Copy.pdf</a>	84.9KB	2017-08-09 08:10:47
First Name: <input type="text" value="1"/>	9. Budget and Budget Justification	<a href="#">Lead Univ Budget.pdf</a>	104.5KB	2017-08-09 08:19:50
First Name: <input type="text" value="2"/>	9. Budget and Budget Justification	<a href="#">Univ-2 Budget.pdf</a>	93.5KB	2017-08-09 08:12:57
First Name: <input type="text" value="3"/>	9. Budget and Budget Justification	<a href="#">Univ-3 Budget.pdf</a>	93.5KB	2017-08-09 08:13:10
First Name: <input type="text" value="4"/>	9. Budget and Budget Justification	<a href="#">Univ-4 Budget.pdf</a>	93.5KB	2017-08-09 08:13:15

## DOWNLOADING THE PROPOSAL

The “Download Proposal” function combines all uploaded files into one PDF file in the order they appear in the Requirements Table and builds a table of contents. It is important to review this PDF document for accuracy, completeness, and before submitting the proposal. This document will be used for the external evaluation of the proposal.

### **8-2018 Scientific Advocate Network Program SAN**

**Download** Download and View a Combined PDF of the Proposal.

**Submit** **WARNING:** Submitting the proposal terminates your ability to make changes.

**Generate Report** Compare requirements vs. uploaded files.

## GENERATING A REPORT

The “Generate Report” can be used to ensure that the requirements of the solicitation are met. Use the Generate Report function to verify that the correct number of files have uploaded for each requirement. This function displays two tables: the first contains all the requirements for the specific solicitation, the second column lists the number of files allowed for each requirement, the third column shows the number of files uploaded by the user, and the last column is a “Warning” column.

The following is a sample of the tables displayed by clicking “Generate Report”.

Reorder Files Loaded			
Requirement	Files Allowed	Files Loaded	Warning
1. Cover Page	1	1	
2. Project Description	1	0	No files loaded.
3. References Cited	1	1	
4. Results from Prior SC EPSCoR Support	> 1	1	Multiple files allowed.
5. Biographical Sketches	> 1	1	Multiple files allowed.
6. Budget Page	1	1	
7. Budget Justification	1	1	

Action	Requirement	File Name	Size	Loaded
<a href="#">Delete</a>	1. Cover Page	<a href="#">Cover.pdf</a>	77.8KB	2018-08-08 16:05:28
<a href="#">Delete</a>	3. References Cited	<a href="#">References.pdf</a>	118.4KB	2018-08-08 16:12:19
<a href="#">Delete</a>	4. Results from Prior SC EPSCoR Support	<a href="#">Results of previous funding.pdf</a>	77.8KB	2018-08-08 16:12:39
<a href="#">Delete</a>	5. Biographical Sketches	<a href="#">Biosketches.pdf</a>	77.8KB	2018-08-08 16:50:02
<a href="#">Delete</a>	6. Budget Page	<a href="#">Budget Page.pdf</a>	77.8KB	2018-08-08 16:50:11
<a href="#">Delete</a>	7. Budget Justification	<a href="#">Budget Justification.pdf</a>	77.8KB	2018-08-08 16:50:37

## SUBMITTING THE PROPOSAL

After all required files have been uploaded, and the proposal was downloaded and reviewed, click the “Submit” button. This will trigger an email to the user indicating that the proposal has been submitted to the SC EPSCoR Office for consideration, and a message will appear confirming the submission as shown below. Also, a new button (“Edit Proposal”) will appear.

*Note: The SC EPSCoR Office will be notified that the proposal has been submitted, but no action will be taken until after the proposal submission deadline as announced in the solicitation has been reached.*

Download Proposal	Combine all proposal files into one PDF with a TOC
Generate Report	Compare the requirements vs. the uploaded files
Submit Final Proposal	<b>WARNING:</b> Submitting the proposal terminates your ability to make changes

## EDITING THE PROPOSAL

The “Edit Proposal” button appears only after the proposal has been submitted. The user may go back to edit the proposal as long as this is done before the proposal submission deadline. By clicking the “Edit Proposal” button, the user is given access to the Requirements Table again.

Download a composite file containing all loaded files. Note that non-standard PDF files may cause this function to fail. C

Click this button to Compare the requirements vs. the uploaded files

Prior to the final due date/time (2017-11-30 17:00:00) for submission of the proposal, you may continue to make changes

**Your proposal has been submitted for review. You will be contacted as soon as the review is complete.**

Requirement	File Name	Size	Loaded	Deleted

**WARNING:** By clicking “Edit Proposal” the SC EPSCoR Office is automatically notified that the proposal has been withdrawn and will not be considered for possible funding. Therefore, it is important to “Submit” the proposal again after editing is complete.