

Manager Role in WRRRI

RFP (Request for Proposals) Setup

Once you are logged in to IPETT the house icon in the navigation bar will take you back to the main landing page where you will have access to RFP list, New RFP, Proposal List, New Proposal, Deliverables, Criteria, States, Institutes, all Contacts, Principal Investigators and Reviewers.

Criteria, Institutions, all Contacts, Principal Investigators and Reviewers should all be added in detail before starting an RFP or proposal. All of these areas are drop down selections within the setup RFP and Proposal forms. You find them under the Manage section of the landing page <https://www.sciencebase.usgs.gov/ipett/>.

Adding a New Contact, PI and Reviewer

Note: All fields that are required are indicated by *.

You can add and edit PI's, reviewers and Contacts through all Contacts.

On the home page under **Manage**

- Click **all Contacts**.
- On the Contact List page in the navigation bar click **+ New Contact**.
- Select the **Type**: Contact, PI, or Reviewer.
- Enter contact Email.
Note: Entering a known email address will automatically populate the fields.
Or
- Fill in desired Contact **Name**.
- Fill in desired Contact **Organization**.
- Fill in desired Contact **Title**.
- Fill in desired Contact **Phone**.

Once Contacts or Reviewers have been added to the Contacts list go to the home page and select "Manage roles and user accounts at the [myUSGS IPETT Community](#)." This will take you to the Sciencebase Directory.

- Under My Communities And Groups, select IPETT_WRRRI | Manage
- To see if an email is already in Directory use the search feature on the right side of the page. If the email does not show there is no account created in Sciencebase Directory for that email and these steps should be followed [Registering for IPETT and password reset](#)
- If the email does appear in the right side list list you will select the check box next to their name. In the left side column Select the "+" icon in the IPETT_WRRRI_Reviewers section to add a reviewer
- Select the check mark when finished to confirm adding the new reviewer
- If you unselect an email in the left side column and select the check mark this will remove the email from the list

The screenshot displays the ScienceBase-Directory interface. At the top, there is a navigation bar with 'ScienceBase-Directory', 'People', 'Organizations', 'User Mgmt', and 'Help'. Below the navigation bar, there are tabs for 'Overview' and 'Groups'. The main content area is divided into two panels. The left panel shows the 'IPETT_WRRRI' group management interface, with a search bar and a list of users. The right panel shows the 'Available Users' list, which includes names and email addresses of potential users. The 'Available Users' list is currently empty, and the 'IPETT_WRRRI_Managers' list contains 8 users, and the 'IPETT_WRRRI_Reviewers' list contains 6 users.

Role Access

- Contacts - can be used as Institute Directors and Institute Contacts, must have account in Sciencebase Directory
- PI - added as PI's and can function as Co-PI's. Will NOT have an account in Sciencebase Directory and will not access the IPETT tool
- Reviewer - MUST be added to Sciencebase Directory as a Reviewer, then added to the necessary RFP

Adding a New Institution

On the home page under **Manage**

*Note: All fields that are required are indicated by *.*

- Click **Institutes**.
- On the Institutions List page in the navigation bar click **+ New Institute**.
- Fill in desired Institution **Name**.
- Fill in desired Institution **Short Name**.
- Fill in desired Institution **State Code**.
- Click **Create**.

Reviewers List

On the home page under **Manage**

- Click **Reviewers**.

Note: You can only view Reviewers List. To add reviewers, add through [all Contacts](#).

Viewing and Editing an Existing Contact

- Click **all Contacts**.
- On the Contact List page sort or select the contact you wish to Edit or view.
- Select the contact. You will be taken to their view page.
- Click **Edit** to modify contact.
- Enter contact Email.
Note: Entering a known email address will automatically populate the fields.
Or
- Fill in desired Contact **Name**.
- Fill in desired Contact **Organization**.
- Fill in desired Contact **Title**.
- Fill in desired Contact **Phone**.

Viewing and Editing Universities

- <https://sciencebase.usgs.gov/ipett-wrri/university/index>
- Can add/edit/remove universities

Adding a New Criteria

On the home page under **Manage**

*Note: All fields that are required are indicated by *.*

- Click **Criteria**.
- On the Criteria List page in the navigation bar click **+ New Criteria**.
- Fill in desired criteria **Name**.
- Click **Create**.
Note: On the Criteria page you will want to add Criterion. You can add as many criterion as you need. These will show up in both the individual review as well as the group/panel review.
- Click **+Add Criterion**.
- Select a **Type**.
Note: You will add the type you wish to see in the review process.
 - **Score** - is an input from 0 (lowest) to 10 (highest) rating scale for each criterion
10 indicates that the proposal is fully satisfied and 0 indicates that the proposal did not satisfy the benchmark.
Note: this score will indicate the amount of funding in the Final Funding Decision.
 - **Comment** - enter up to 3 Proposal Strengths and 3 Proposal Weaknesses in the dialog boxes provided
Short but descriptive responses in bullet form are acceptable and appreciated.
 - **Rating Scale** – This will display as stars and is an overall rating using the scale of 1=Poor to 5=Excellent.
 - **Approval Scale** - This will display as a heat signature and is an overall rating using the scale of 1=Poor to 5=Excellent.
 - Fill in a **Name** and **Description** (if desired).

Creating an RFP (Request for Proposals)

- Click **+New RFP**.

*Note: All fields that are required are indicated by *.*

- Select a grant **Type** from the drop down.
- Enter a **Fiscal Year**.
Note: Use the 4 digit year XXXX.
- The **RFP Stage** is moved through the work flow using the buttons at the bottom of the RFP.
The first stage will start at **Setup**.
Note: Once you have moved past a stage you can open the RFP and change the Stage back to one you may have moved past.
- Enter the **Budget** that you will be working with.
- Select a **Criteria** from the drop down list. (See **Adding a new criteria:** to add to the list). - Add criteria to the RFP only when required.
- Select all the **Reviewers** that will be reviewing the proposals. (See **Adding a new contact, PI and Reviewer:** to add to the list).
- Click **Create** to save your entries.
- Click **Cancel** to delete all entries and go back to your previous screen.
- After the RFP is created you will click **Open Proposal Submissions** in order to add proposals. This also opens the RFP for Institutes to add proposals.
- Click **OK** to move this RFP to the next Stage to allow Proposal Submissions.

Editing an RFP

- Once you have created your RFP you may edit the RFP at Setup, Proposal Submissions, Submissions Verification, Individual Review, Review Verification, Group Review and Admin Review stages.
Once an RFP is in Projects Live, Closed or Cancelled you will not be able to edit, you will only be able to view the RFP.
You may also delete the RFP from the show page.

WARNING: This will delete all Proposals/Projects associated with this RFP!

To Edit the RFP

- From the home page click **RFP List** in the navigation bar.
- You can filter by Type, Fiscal Year, Stage and Criteria.
- Click on the RFP **Type** or **Fiscal Year** to access your RFP.

To Make Changes

- Click **Edit**.
- Click **Update** to save changes.
- Changes will be lost when you click **Cancel**.

RFP Stages

Note: The stages are in sequential order. Each stage must have the previous stage completed to move on. Access through RFP list and specific RFP you are moving.

1 - Setup - setup in progress.

2 - Proposal Submissions - At this stage you are able to submit proposals.

To start Proposal submissions:

- From the RFP show page click **Open Proposal Submissions**.
- Click **OK** to move this RFP to the next Stage to allow Proposal Submissions.

3 - Submissions Verification – All proposals need to be registered or canceled.

To start Submissions Verification:

- From the RFP show page click **Verify Submissions**.
- Click **OK** to close the Proposal submission window and start the verification of submissions Stage.
- You may move the RFP to Projects Live, this will skip the review process.
- From the RFP show page click **Project Live**.
- Click **OK** to move this RFP to Projects Live Stage.
Note: This will apply funding decision to all Proposals: partially and fully funded Proposals will be accepted, not funded Proposals will be rejected.

4 - Individual Review - All submissions are verified.

To start Individual Review:

- From the RFP show page click **Start Individual Review**.
- Click **OK** to close the Proposal submission window and start the verification of submissions Stage.

- Notifications are sent to Reviewers notifying them of proposals to review.
Note: If you add reviewers after the phase starts they will not be auto notified.
- Reviewers are able to edit their assigned proposal review page in this stage.

5 - Review Verification – All individual reviews are complete.

To start Review Verification:

- From the RFP show page click **Close & Verify Reviews**.
- Click **OK** to end individual reviews.
- If you need to reopen the Individual Review stage click **Start Individual Review**.
- Click **OK** to open this RFP's Proposals to individual reviews.

6 - Group Review - All proposals are registered and individual reviews are completed and verified.

To start Group Review:

- From the RFP show page click **Start Group Review**.
- Click **OK** to move this RFP to the Group Review Stage.

To see the Group Review Show page:

- From the RFP show page click on **Proposal List...**
Note: This is the place where you'll look at the reviews together during the meeting. This will show you an overview of the proposals and how they were reviewed.
- To see the breakdown of how each person voted click on the number (example **4/4**) in the **Review** column.
- Previous Score vs Score.
 - **Previous Score** is the score that was present at the end of the Individual Reviews.
 - As Reviewers make changes to the scores during the Group Review these are reflected in the **Score** column.

7 - Admin Review - Final admin review.

To start Admin Review:

- From the RFP show page click **Start Admin Review**.
- Click **OK** to move this RFP to the Admin Review Stage.
- During the admin review, managers can make adjustments to the scores provided by reviewers.
 - From the RFP show page.
 - Click on the **Proposal List...**
 - Click on the number (example **4/4**) in the **Review** column.
 - Click on the name of the reviewer you wish to change.
 - Click **Edit**.
 - You can make changes to any field, including fields related to the original criteria.
 - Click **Update** to save your changes.
- You can click **Apply Funding Decisions**.
- Click **OK** to apply funding decision to all Proposals: partially and fully funded Proposals will be accepted, not funded Proposals will be rejected.
- You will be taken to the Proposal List, you will be able to adjust any of the proposals before going live.
- Proposal will have individual **Accept Proposal** and **Reject Proposal** buttons.
- Click **Accept Proposal** (funded) or **Reject Proposal** (not funded) in EACH proposal individually.
- All Proposals need to be moved to accepted or rejected.

8 - Projects Live - All projects on-going.

To move to Projects Live:

- From the RFP show page click **Projects Live**
- Click **OK** to apply funding decision to all Proposals: partially and fully funded Proposals will be accepted, not funded Proposals will be rejected.
- Promised deliverables are added.
- Deliverables are reviewed on each accepted proposal.

9 - Closed - All projects are closed or completed.

To move to Closed:

- From the RFP show page click **Close RFP**.
- Click **OK** when you are sure you want to CLOSE this RFP.

10 - Cancelled – Entering this will cancel all proposals associated with the RFP.

To cancel:

- From the RFP show page click **Delete**.
- Click **OK** when you are sure.
- This can be done at any RFP stage.

Editing a Proposal

- From the home page click **Proposal List** in the navigation bar.
- You can filter by RFP, Stage, Applicant and Panel Category.
- Click on the **Proposal Title** you wish to edit.
- Once on the Proposal show page click **Edit**.

Adding Expected Deliverables to a Proposal

- From the home page click **Proposal List** in the navigation bar.
- You can filter by RFP, Stage, Applicant and Panel Category.
- Click on the **Proposal Title** you wish to edit.
- Once on the Proposal show page click **Edit**.
- Click **+ Add Deliverable**.

*Note: All fields that are required are indicated by *.*

- Select a **Type** from the drop down.
- Fill in desired **Name**.
- Fill in desired **Description**.
- Check if you have an **Example**.
- Fill in desired **Due Date** or leave empty to default to Proposal End Date.

Adding Deliverables to a Proposal

- From the home page click **Proposal List** in the navigation bar.
- You can filter by RFP, Stage, Applicant and Panel Category.
- Click on the **Proposal Title** you wish to edit.
- Find **Proposal Deliverables**.
- Click the deliverables **Name, Type** or **Status**.
- Click **+ Upload New File**.
- Click **Browse...**
- Select the deliverable file you wish to upload.
- Click **Update**.

Deliverable Review

- From the home page click **Proposal List** in the navigation bar.
- You can filter by RFP, Stage, Applicant and Panel Category.
- Click on the **Proposal Title** you wish to edit.
- Find **Proposal Deliverables**.
- Click the deliverables **Name, Type** or **Status**.
- Click **Edit**
- Enter **Delivery Date**
- Input **Rating** from 1 to 5: 1=Poor, 2=Marginal, 3=Satisfactory, 4=Very good, 5=Excellent
- Fill in desired **Comment**.
- Click **Update**.

Proposal Stages

Note: Access through Proposal list and specific Proposal you are moving.

- Registered
 - New proposal registered, submitted and under review. RFP stages 2 – 7
 - All Proposal start at this stage and remain here until Accepted or Rejected.
- Accepted
 - Proposal is accepted and is now a project.
 - From the Proposal show page click **Accept Proposal**.
 - Click **OK** to accept this Proposal.
 - Notifications are sent to PI's and Collaborators asking to update expected deliverables.
 - PI's and Collaborators are able to edit the proposal.
- Admin Verification
 - This starts the projects admin verification of deliverables.
 - From the Proposal show page click **Start Admin Verification**.
 - Click **OK** to move this Project to the Admin Verification Stage.
 - Notifications are sent out to Managers that expected deliverable review needs to be completed.
 - You can send the project back to **Accept Proposal**.
 - This will send a notification to PI's and Collaborators asking to update deliverables based on pending award amount.
 - PI's and Collaborators are only able to edit the proposal deliverables if set back to Accept Proposal.
- Funding Verification
 - This starts the projects funding verification.
 - From the Proposal show page click **Start Funding Verification**.
 - Click **OK** to move this Project to the Funding Verification Stage.
 - Notifications are sent out to Managers that the deliverable review is complete and funding needs reviewed.
- Project Live

- On-going project and deliverable submissions in progress.
- From the Proposal show page click **Project Live**.
- Click **OK** to move this Project to the Project Live Stage.
- Notifications are sent out to PI's and Collaborators that funds are to be released, project is live and awaiting deliverables
- PI has access to upload deliverable files.
- Deliverable Review
 - Deliverables delivered, admin review in progress
 - (PI) click **Submit Deliverables**
 - Notifications are sent out to Managers that deliverables are uploaded.
- Incomplete
 - The project requires better or further deliverables.
 - From the Proposal show page click **Incomplete Project**.
 - Click **OK** to move this Project to the INCOMPLETE Stage.
 - Notification is sent to PI and Collaborators that the deliverables need to be fixed (may occur several times)
- Complete
 - Project is completed.
 - From the Proposal show page click **Complete**.
 - Click **OK** to set this Project to the Complete Stage.
 - Notification is sent to PI and Collaborators that their deliverables have been accepted and project complete
- Rejected
 - Proposal or Project rejected.
 - From the Proposal show page click **Reject Project**.
 - Click **OK** to REJECT this Project.
 - Notification is sent to
- Cancelled
 - Proposal or project cancelled.
 - From the Proposal show page click **Delete**.
 - Click **OK** to delete this Project.
 - This can be done at any proposal stage.