



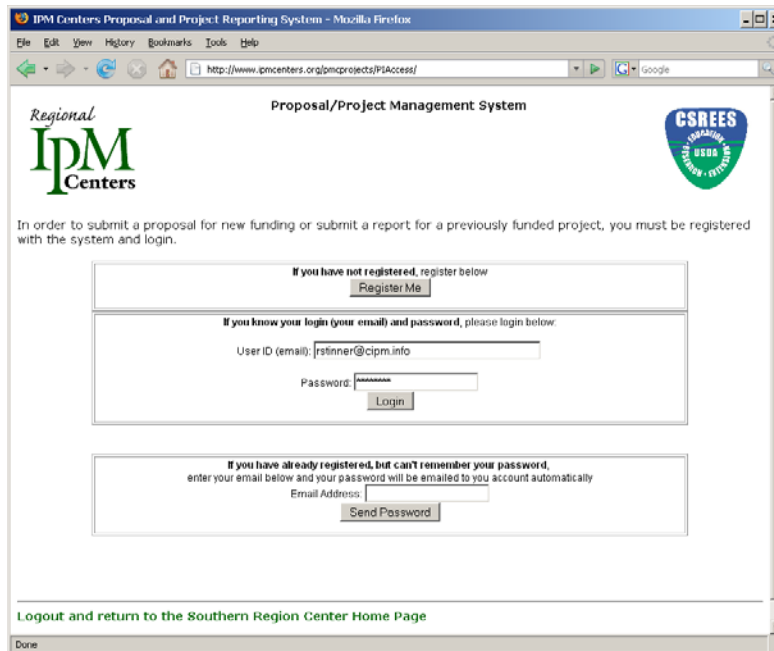
Project Director's Guide to the Regional IPM Centers' Proposal/Project Management System (PPMS)

Ron Stinner

Version 1.1
Date 2/20/2008
CIPM Tech Bull. 2008-2

PD/PI Access to the Proposal/Project Management System

The main page for this set of applications will be linked from the individual Regional IPM Center sites for RFAs, and in emails with requests for reports from existing projects. For both proposal and report submission, PIs will login with the same login and password (Figure 1).



The screenshot shows a web browser window titled "IPM Centers Proposal and Project Reporting System - Mozilla Firefox". The address bar shows the URL "http://www.ipmcenters.org/pmprojects/PIAccess/". The page content includes the "Regional IPM Centers" logo on the left and the "CSREES" logo on the right. Below the logos, a message states: "In order to submit a proposal for new funding or submit a report for a previously funded project, you must be registered with the system and login." There are three main sections for user interaction:

- Registration:** "If you have not registered, register below" with a "Register Me" button.
- Login:** "If you know your login (your email) and password, please login below". It contains a "User ID (email)" field with the value "jstinner@cipm.info", a "Password" field with masked characters, and a "Login" button.
- Password Reset:** "If you have already registered, but can't remember your password, enter your email below and your password will be emailed to you account automatically". It contains an "Email Address" field and a "Send Password" button.

At the bottom of the page, there is a link: "Logout and return to the Southern Region Center Home Page". The browser status bar at the bottom shows "Done".

Figure 1. PD/PI Login page

If you do not have a login/password, you must register with the system (see Figure 2 below). We will NOT provide your information to anyone outside of the Regional IPM Center staff and USDA/CSREES, except that public information provided for funded projects.

Your login is the email address you provide when registering. If you cannot remember your password, or are not sure if you have registered, use the box labeled 'If you have already registered, but can't remember your password'. If you haven't registered, you will be directed to the page that allows you to register. If you have registered, the system will email your password to the email address provided.

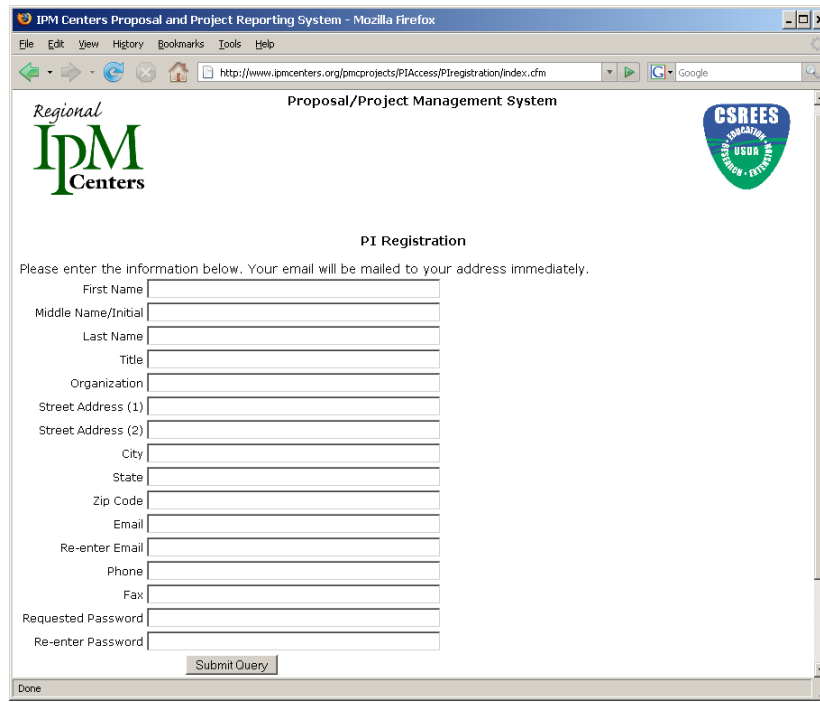


Figure 2. PD/PI Registration page

For registration, your name, organization, state, and email are required. The other information is requested only in the case that we need to contact you and are unable to do so electronically. As soon as you complete the registration page, your login (email address) and password are valid for securely into the system.

Please be aware that we keep track of your work using 'session variables' on our server, not cookies on your computer. While this protects you, it also means that you must logout or closeout all instances of your browser (ALL browser windows) when you finish or others could have access to your proposal/report information from your computer.

You can always view current RFAs through links from your Regional IPM Center without logging on. You can also download the needed proposal submission forms for any RFA via the same links. However, you must login to actually submit proposals and reports. You can also see the active RFAs and necessary forms after you have logged in.

PI/PD Access Main page

Once you have logged into the PI/PD Access Main page (Figure 3), the first button links allow you to submit new proposals, edit your personal information, and , if the module is activated, see a listing of invoices submitted by your organization.

Next on the page will be listed any proposals in progress (with links to continue the submission) or submitted for active RFAs. Once submitted you must contact the RFA administrator to make any changes in your submitted proposals.

Below your proposals are your active funded projects. If reports have been requested, the status of your reports will be listed, with links to file reports or see reports already filed.

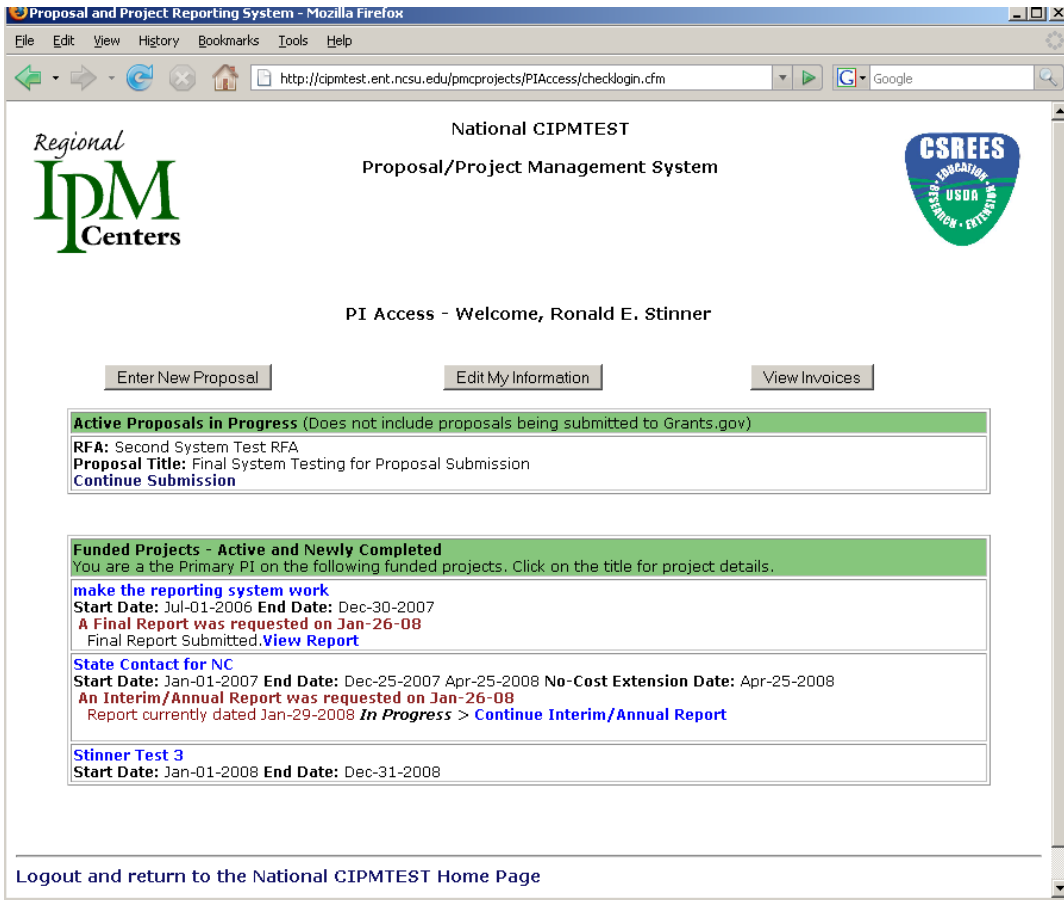


Figure 3. Main PD/PI Access page

When you click on 'Enter New Proposal' you are taken to a page, within the secure PD/PI Access system, that lists the RFAs with brief description of each and a link to RFA details, proposal form downloads and the submission process itself (Figures 4 and 5)

Enter New Proposal pages – List RFAs

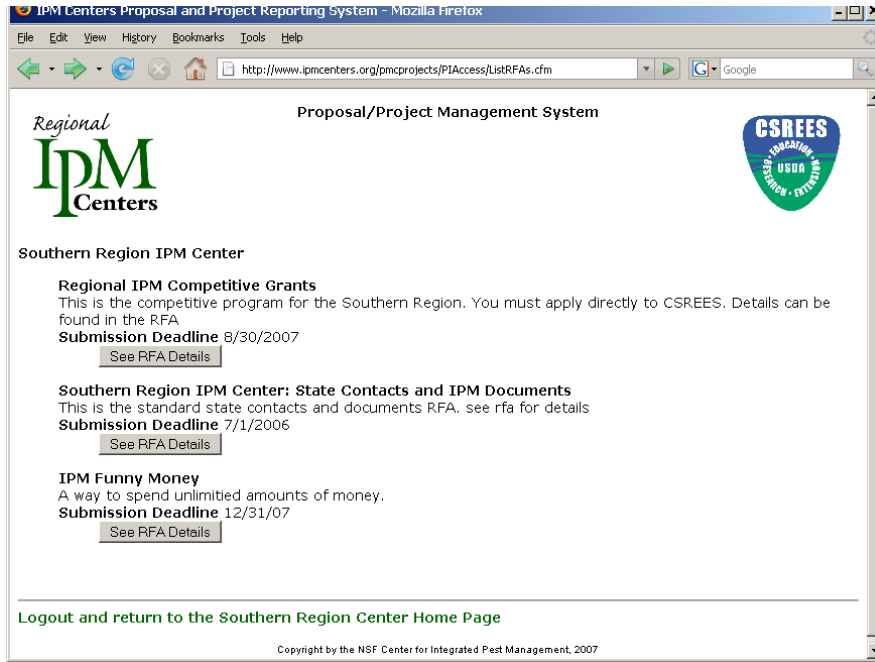


Figure 4. Active RFA Listing page

Enter New Proposal pages – List RFA Details

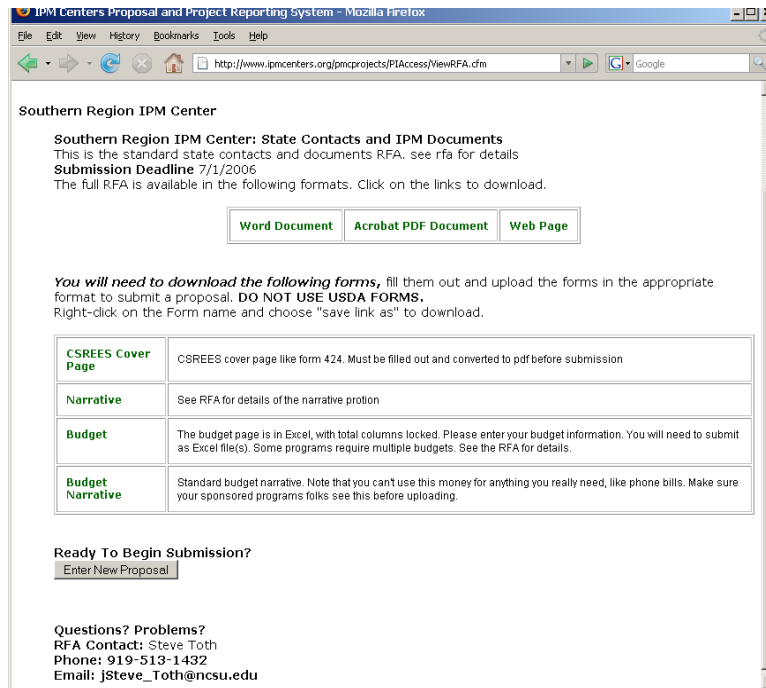


Figure 5. RFA Details page

The RFA Details page includes links to the RFA in one or more formats. These links allow you to download a Word or PDF document or view online, if a web version is available. The page also includes all of the forms you will need to submit a proposal for the given RFA, with an explanation of each form. You should download all of these forms by right clicking and choosing 'save as' to a location on your computer. Each form will be in one of the following formats: Word doc, Excel xls, Acrobat fillable pdf, or compressed zip. Full instructions for filling the individual forms are provided in the RFA and/or the form itself.

The page also includes the link to begin proposal submission, and contact information for questions about the electronic proposal submission process. After you have prepared your proposal and filled out all forms, come back to this page and click the 'Enter New Proposal' button on this RFA Details page.

Proposal Submission page

PLEASE NOTE THAT YOUR PROPOSAL WILL NOT BE SUBMITTED UNTIL YOU FILL OUT THE PAGE BELOW, ADD PI/PD's, UPLOAD PROPOSAL FORMS AND CLICK ON 'FINAL SUBMIT' ON LATER PAGES.

Regional IPM Centers

Southern CIPM
Proposal/Project Management System

CSREES
USDA
NATIONAL FORESTRY SERVICE

Proposal Submission Form

RFA Title: Stinner Second System Test RFA

Please fill in the information below. After you submit this form you will be asked to upload the documents required by this rfa. After you have submitted this form, and added any additional co-PIs, your pre-proposal will be in the system. You will then be able to stop and return to edit/complete submission of your proposal at any time up until the submission deadline

1. Contracting State* Alabama

2. Contracting Organization*

3. Cooperating States
Alabama
Alaska
American Samoa
Arizona

If this is a multi-state project, please select cooperating states. You can use the CTRL key for multiple selections. DO NOT INCLUDE THE CONTRACTING STATE ALREADY SELECTED IN 1 ABOVE

4. Title of Proposal*

5. Funding Requested* \$

6. Target Pest(s)

7. Site/Commodity

8. Area of Emphasis

9. Proposal Summary*

10. Objectives*

Submit Information

*Required

[Logout and return to the Southern CIPM Home Page](#)

Copyright by the NSF Center for Integrated Pest Management, 2007

Figure 6. Initial Proposal Submission Page

The initial data entry for all proposals includes the information indicated in Figure 6. Cooperating states can be listed, but only one state (the primary PI's state) must be listed as the contracting (lead) state. Target pest, site/commodity and area of emphasis are not required but should be filled in where appropriate. 'Area of emphasis' is a field used for IPM activities not covered by pests and commodities; for example, biological control, invasive species, and similar cross-cutting activities.

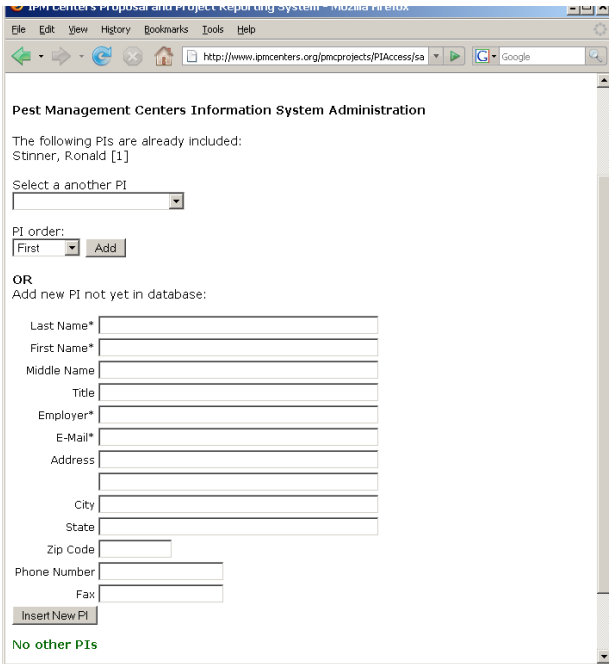


Figure 7. Add PI page

Once this information is submitted, the system requests any additional PIs be added (Figure 7). After any additional PIs are added, selecting 'No More PIs' takes you to the form upload page (Figure 8). This page allows you to upload one or all documents sequentially. You can leave and come back at any time until you select 'Submit Final Proposal'. However, you must click this button before the proposal deadline to submit your proposal.

Proposal Forms Upload and Submit page

The proposal forms upload page keeps track of which forms you have already uploaded and which have not yet been uploaded. It will also tell you for each form what type of document needs to be uploaded and whether multiple uploads are allowed.

As forms are uploaded, it will allow you to view any forms already uploaded and delete to replace if necessary.

Once you are completely satisfied, click the 'Submit Final Proposal' button. You will be notified via email that your proposal has been submitted and accepted by the system for panel review.

If you submit by mistake or have problems, contact the Proposals Administrator listed in the RFA.

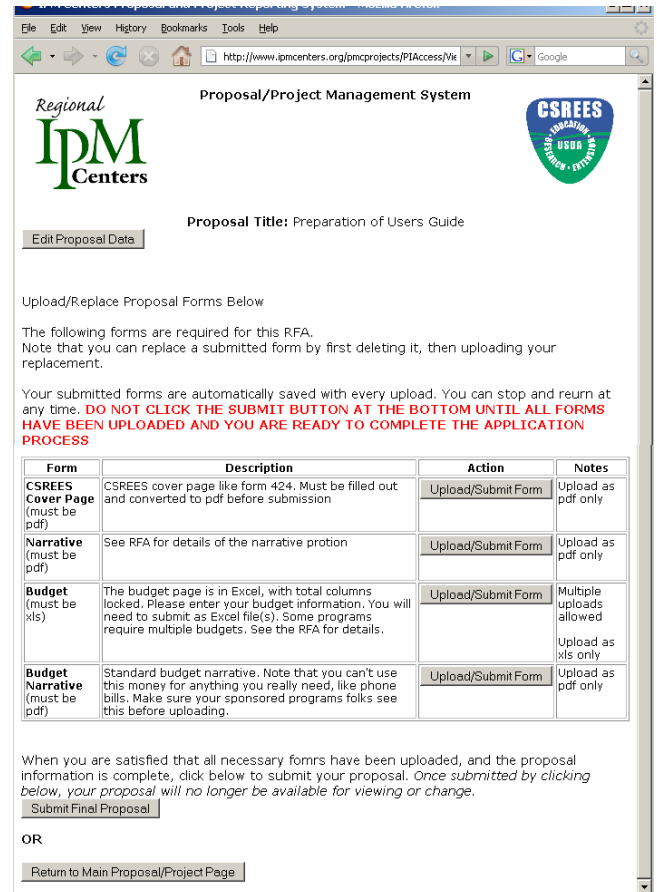


Figure 8. Proposal Forms Upload page

Until final proposal submission or the RFA deadline, you can edit your proposal information and delete and re-upload required forms.

Submitting Project Reports

The grants manager will create an on-line form for specific program reports. The Primary PI will be notified via email that a report is due. The email will contain a link to this system. Each report is specific to a given program, so details cannot be provided here.

Please note that all reports allow uploading of Appendices as pdf files, so you are able to include additional information or explanations you feel are important. Also note that all reports are immediately available on-line and can be viewed from the main system site.

Information on the projects in this system are also be transferred to the IPM Interagency Database System (<http://projects.ipm.gov>) by the grants manager.