

User's Manual for the PDD Web-based Application **(for SPS Pre-Award Personnel)**

This Proposal Driven Disclosure web-based application has been designed to streamline data collection and management of Financial Interest Statements (FIS) related to research proposals submitted to external sponsors and minimize administrative burden for both Administrators and Investigators. For Administrators, although their work will be greatly simplified by this application, there are still two remaining tasks they need to complete in performing their duties related to collecting FIS: A) Adding Investigators and Update Proposal Status for Proposals Already Recorded in PERA, and B) Create/Add New Proposals that have not been recorded in PERA. In the following, we will outline how the application can be used to accomplish these tasks and then talk about some other useful features of the PDD software.

After completing the processes described in either A) or B), the system will automatically send email messages with first notices to all identified "Investigators" asking them to complete their FIS. These notifications will go out the next morning at 6 am. Additionally, the system will afterwards send second and third reminders to Investigators who have not completed their FIS, 30, and then 60 days after their first notice, automatically. As part of this application, the "Investigators" will fill out their FIS online, upon receipt of their notifications, and the system Administrators and Personnel will be able to review these statements and take appropriate action, as necessary.

How to Access the System

To access the PDD Application on the web, please type:

<https://engineering.purdue.edu/VPR/PDD>

(add this link to your Bookmarks for future use).

How to Login

To log into the system Use your Career Account Login and Password. After Login, you will be taken to the main screen of the application.

The screenshot shows the login interface for the Purdue University Proposal Driven Disclosure Database. At the top left is the Purdue University logo. To its right, the text reads "Office of the Vice President for Research" and "Proposal Driven Disclosure Database". The main content area is titled "Login to the Disclosure Database" and contains the following elements: a sub-header "Login using your Purdue Career Account Login and Password.", a "User name" input field, a "Password" input field, a checkbox labeled "Remember my user name", and a "Login" button. Below the login fields, there are two lines of text: "Having trouble logging in? Be sure to enable cookies in your web browser." and "Don't forget to logout or exit your browser when you're done."

SPS Pre-Award Processes:

A. Add Investigators and Update Proposal Status for Proposals Already Recorded in PERA

Proposals that have been already recorded in PERA will be uploaded into the PDD database on a daily basis. For these proposals, you are going to Add Investigators (PIs and Co-PIs will be already included, most of the time for these proposals). Please follow the following steps:

1. From the Main Screen, choose "**All Proposals**" – second tab at the top.
2. Then choose the center name for the college of the Responsible Department (for example "**COE**") from the **Pre-Award Center** drop-down menu, and then choose "**New**" from the **Status** drop-down menu. You will obtain a list of all new proposals from this College Center. Choose a proposal from the list by clicking on proposal **Title**. You will obtain a detailed description of the particular proposal and will have several **Proposals Options** listed on the top right corner of your screen.
3. PERA lists both internal and external investigators. Review the list in the PDD, adding other "**Investigators**" as needed.

PURDUE UNIVERSITY Office of the Vice President for Research Proposal Driven Disclosure Database

My Proposals **All Proposals** Add a Proposal Access Control Agencies Pre-Award Centers COI Reviews

Logged in as: | Logout

All Proposals

IP # Investigator Agency Status

Pre-Award Center

- All -

Ag/Vet Med

COE

COS/COP/CHHS

Central

DP

Only show proposals where I am selected as the s

Only show proposals that any investigator has fina

New

Awaiting Response

Awaiting Disclosure Review

Review Completed

Filter or Clear Filters

25 1 - 25 of 1000

IP #	Investigator	Agency	Status
10022235	New	Development and field evaluation of genome-wide marker-assisted selection (GWMAS) over multiple generations in commercial poultry. MUIR, WILLIAM M	AGRICULTURAL RESEARCH SERVICE
10043541	New	A Challenge in Life Sciences Undergraduate Education HRYCYNIA, CHRISTINE A; MINCHELLA, DENNIS J; SANDERS, DAVID A; CHMIELEWSKI, JEAN A; LOUDON, MARC	HOWARD HUGHES MEDICAL INSTITUTE

4. To add an **Investigator** from Purdue:

- a. Choose "**Add a Purdue Investigator**" from the **Proposal Options** in the upper-right corner of your screen.
- b. Enter a name or Purdue email address into the search box.
- c. If more than one person matches your criteria, you'll be presented with a list of possible matches from which to select. Choose one person from your list.
- d. Using the **Type** drop-down menu, select the investigator type (there are three choices: PI, Co-PI and Investigator). For this particular scenario, choose Investigator type to be just **Investigator**.
- e. Click "**Add Investigator.**"

PURDUE UNIVERSITY Office of the Vice President for Research
 Proposal Driven Disclosure Database

My Proposals All Proposals Add a Proposal Access Control Agencies Pre-Award Centers COI Reviews

Logged in as: | Logout

Proposal

IP #: 10043732

Title: Asymptotic Solutions To Recurrences and Functional Equations Arising in Computer Science

Pre-Award Center: COS/COP/CHHS

Specialist: - Unassigned -

Status: New

Submission Date: 03-14-2011

Agency: NATIONAL SECURITY AGENCY

Sub Agency:

Update Proposal

Proposal Options

- View Transaction Log
- Add a Purdue Investigator
- Add a Non-Purdue Investigator

Add Investigator

Purdue Person:

Search for Purdue People by name or e-mail address

- Darwin O Collins
 Organizational Leadership And Supervision
 darwin@purdue.edu
- Darwin K McKinney
 Emeritus/emerita Retiree
- Darwin R Sievers
 English And Linguistics
 dsievers@purdue.edu

Type: PI

Add Investigator

Investigators

Investigator	PUID	Role	Response	C1 Status	Conflict Status	Last Notified
SZPANKOWSKI, WOJCIECH	00100-65908	PI				Never

5. To add an investigator from an outside institution:

- Choose **"Add a Non-Purdue Investigator"** from the **Proposal Options** list in the upper-right.
- Enter the name and email address information for the non-Purdue Investigator.
- Using the **Type** drop-down menu, select the investigator type (**Investigator**).
- Click **"Add Investigator."**
- Add all other investigators, as needed.

6. After adding all additional Investigators, change the status in the proposal **Status** drop-down menu from **"New"** to **"Awaiting Response."** This is a very important step, the system will not send automatic e-mails to "Investigators" unless the proposal status has been changed to **"Awaiting Response"**.

PURDUE UNIVERSITY Office of the Vice President for Research
 Proposal Driven Disclosure Database

My Proposals All Proposals Add a Proposal Access Control Agencies Pre-Award Centers COI Reviews

Logged in as: Rebecca Moon | Logout

Proposal

IP #: 10043732

Title: Asymptotic Solutions To Recurrences and Functional Equations Arising in Computer Science

Pre-Award Center: COS/COP/CHHS

Specialist: - Unassigned

Status: Awaiting Response

Agency: NATIONAL SECURITY AGENCY

Sub Agency:

Update Proposal

Proposal Options

- View Transaction Log
- Add a Purdue Investigator
- Add a Non-Purdue Investigator

Add Investigator

Name:

Enter name in format: LAST, FIRST

E-mail:

E-mail address for non-Purdue investigator

Type: PI

Add Investigator

Investigators

Investigator	PUID	Role	Response	C1 Status	Conflict Status	Last Notified
SZPANKOWSKI, WOJCIECH	00100-65908	PI				Never Remove

7. Click "**Update Proposal.**" After completing this step, the system will automatically send email messages to all investigators asking them to complete their FI Statements (this will happen the next morning at 6 am).
8. The system will afterwards send second and third reminders 30 and then 60 days after the first notice, automatically.

B. Create/Add New Proposals

For various practical reasons, it might be necessary for you to **Add a New Proposal** into the PDD system. To accomplish this task, please follow the following steps.

1. From the horizontal tabs at the top of application main screen, choose the third option, **Add A Proposal.**
2. Enter proposal details (Title, Pre-Award Center, Date, etc.).

3. When you entered all the proposal data, click "**Create Proposal**" (at the bottom of your screen). The system will inform you that a proposal has been created and will prompt you to add Investigators (you should see the following message on the screen "**Proposal created, add investigators below**").
4. Next, please follow steps 4 to 7 in Section A above.

The screenshot shows the 'Add a Proposal' form in the Purdue University Proposal Driven Disclosure Database. The header includes the Purdue University logo and the text 'Office of the Vice President for Research Proposal Driven Disclosure Database'. The navigation menu contains 'My Proposals', 'All Proposals', 'Add a Proposal' (highlighted with a red circle), 'Access Control', 'Agencies', 'Pre-Award Centers', and 'COI Reviews'. The user is logged in as 'Rebecca Moon' with a 'Logout' link. The form fields include: 'IP #' (text input), 'Title' (text input), 'Pre-Award Center' (dropdown menu with '- Unassigned -'), 'Specialist' (dropdown menu with '- Unassigned -'), 'Status' (dropdown menu with 'New'), 'Submission Date' (text input), 'Agency' (dropdown menu with '21ST CENTURY RESEARCH & TECHNOLOGY FUND'), and 'Sub Agency' (text input). A 'Create Proposal' button is located at the bottom of the form.

When you have completed your work, please logout of the system using the Logout option at the top of your screen.

C. Other Important features of the system.

1. **View Transactions Log** – will allow you to view all the activity on a specific proposal (who has done what when).
2. In "**All Proposals**" you can sort and query the database to create reports by using search terms such as: FP#, Investigator, Agency, Status, etc. After

choosing your search terms, please click "[Filter](#)". To export the results into a .xcl file just click "[Export these Proposals](#)".

Public Health Service (PHS) Agencies

1. Office of Global Affairs (OG)
2. Office of the Assistant Secretary for Health (OASH)
3. Office of the Assistant Secretary for Preparedness and Response (ASPR)
4. Agency for Health Care Research & Quality (AHRQ)
5. Agency for Toxic Substances and Disease Registry (ATSDR)
6. Centers for Disease Control and Prevention (CDC)
7. Food and Drug Administration (FDA)
8. Health Resources and Services Administration (HRSA)
9. Indian Health Service (IHS)
10. National Institutes of Health (NIH)
11. Substance Abuse and Mental Health Services Administration (SAMHSA)
12. Office of Public Health and Science
13. Office of the Assistant Secretary for Planning and Evaluation

PHS-Like Agencies

1. Alliance for Lupus Research (ALR)
2. American Asthma Foundation
3. American Cancer Society (ACS)
4. American Heart Association (AHA)
5. American Lung Association (ALA)
6. Arthritis Foundation (AF)
7. CurePSP
8. Juvenile Diabetes Research Foundation (JDRF)
9. Lupus Foundation of America (LFA)
10. Patient-Centered Outcomes Research Institute (PCORI)
11. Susan G. Komen for the Cure
12. United Soybean Alliance
13. Administration for Children and Families (ACF)

Other Agencies

1. Department of Energy (DOE)
2. NASA