Creating an eURF in the Spiderweb System

Reference Guide

Updated November 19, 2011
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Acknowledgements: This document was based on a version created by Tricia Ribeiro for use in the School of Dental Medicine. We would like to thank her for allowing us to use her work.
Creating an eURF

Navigating to the eURF

1. Go to the Spiderweb site: [https://ora.ra.cwru.edu/spiderweb](https://ora.ra.cwru.edu/spiderweb)
   > Navigate from the homepage:
     a) Go to [www.case.edu](http://www.case.edu), hover on “Research” in the left side and then click on “Research Administration” in the menu.
     b) Click on “SPIDERWEB” under the “Resources” menu. Shown below.
2. Login using your Case ID and Password

If you cannot login to Spiderweb with your Case Western Reserve network ID and password, contact Jeff Simpkins in Research Administration (jeffrey.simpkins@case.edu, 368-5316) to gain access to the system.
3. Once logged in, you will be brought to the main Spiderweb page. From this page, you will choose “eURF” from the left side menu bar.
4. When you arrive at the eURF page, the screen will have two sets of option tabs, plus a link to your recent eURF’s. The page is created using Adobe Flash – if you have problems, you can switch to an HTML version by clicking the link at the top of the page.

- The top set of tabs refers to the routing process of eURFs that fall into the area(s) of responsibility that have been designated to you.
  - Awaiting Your Approval tab: Here you will see a summation of all eURFs that are currently in your queue awaiting your approval before moving on to the next approver.
  - Routed for Others tab: Allows a quick view of the eURFs you have created and where they currently sit within the approval process.
  - eURF Tools tab: Use this tab to manage Favorites lists that are used in eURF creation.
    - Keywords: Clicking the Keyword List button will download an excel file containing the current keyword list available on the eURF form.
    - Sponsors: Clicking the Manage Favorite Sponsors button will take you to a form where you can edit your list of favorite sponsors used within the eURF form.
    - People: Clicking the Manage Favorite People button will take you to a form where you can edit your list of favorite people used within the eURF form.
• Immediately above the bottom set of tabs are the three most recent eURF’s on which you have worked. Just below that is the bottom set of tabs that lets you create new eURFs, view eURFs that are in process or completed, and manage any eURFs that you have designated as templates.

It is from this screen that you will begin the process of eURF creation. To get started, enter a title into the eURL title box. It is important to note that if your grant is awarded, this is the title that will appear on your expense reports. Once something has been entered in this field, the “New” button will become clickable. Once your title is entered, click “New” to proceed.
5. You are now at the eURF main entry page. From this page, you will enter all the information required by Case Western to set up the award. Many of the questions will have a “more” following them. You may use that to see additional information on the question and how to answer it.

**Quick Keys:** Clicking on the labeled hyperlinks will take you to the corresponding section of the eURF.

**Attachments:** In this section, you can upload any support documents to the eURF. The most common attachments are detailed budgets, IRB approvals, and application packets.

**eURF Detail:** The eURF Detail section will populate automatically, assigning an eURF ID number and listing the Short Title based on what was entered on the previous screen. This Short Title is editable if necessary, since this is the title that will be listed on the internal NOA, if awarded.
Section A: General Information

Project Title: This is the long project title. This should match the title on the application and/or proposal submitted to the Sponsor.

Short Project Title: This is a short title that flows through to PeopleSoft and is used on all the PeopleSoft expense reports, so it is important that it is descriptive and meaningful to you and to the investigator.

Multiple Management Centers: If the proposed project will involve personnel outside of your school, then “Yes” must be checked for this question. When “Yes” is checked, use the dialog box to the right to choose the other Management Center(s).

Administrative Department/Department Contact: These drop-down lists are automatically populated based on your Spiderweb profile. It will only list departments and people within the Management Center to which your Case Western network ID has been assigned.

Principal Investigator(s): The person who bears the ultimate responsibility for the conduct of the grant. You may search for any principal investigator from within the university using the search feature located...
just to the right of the drop down list, or you may select a principal investigator from within your department or management center from the drop down list.

Searching for an Investigator:

1. If you need to search for an investigator, click on the search button and you will get to this screen:

2. Once you enter in a search term and click search, Spiderweb will display all the possible matches.

3. Click on the name of the person to update the investigator box.

4. If you don’t find the person you need, contact the Office of Research Administration to have the person added to Spiderweb.
Immediate Sponsor: List the Agency/Institution that will pay CWRU. Think, “Who will write a check to Case Western Reserve University?” The entity writing the check is the Immediate Sponsor.

Primary Sponsor: This field will be used when CWRU is receiving a subcontract from another institution that is serving as the Immediate Sponsor. The Primary Sponsor is the entity from which the Immediate Sponsor is receiving its funds. A common combination for primary and immediate sponsor is where a federal agency (the primary sponsor) gives an award to another university (the immediate sponsor) who then subcontracts with us to do some of the work.

- If the Sponsor is not listed in the drop down list, use the “Search” button to search for your sponsor. **If the search fails, and only after a search, there will be a hyperlink that will allow you to add a new sponsor.**
Submission Type: Choose the option from the drop down menu that best fits the proposal that is being submitted.

- **New**: Use for a proposal that has never been submitted to a particular agency in the past. If a proposal is being submitted for the first time to multiple sponsors, each proposal to each unique sponsor must have its own eURF and should be listed as “New”.

If you don’t find the sponsor who you’d like to add to your list you can manually add it here.
- **Continuation**: Used for a funded project that spans multiple years without requiring a competitive review. During the project period, funding is essentially guaranteed and would not be revoked except for reasons of gross misconduct.

- **Renewal**: For funded projects, a proposal is considered up for renewal when the original project period is over and additional funds are open to any institution who wants to submit a proposal.

- **Supplemental**: Additional funding is being requested from the same sponsor for an active project.

- **Other**: To be used when no other type is applicable. If you are using this designation, be sure to type in a description in the box to the right.

- **Resubmission**: Used for revised submissions of unfunded or withdrawn proposals.

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**Award Mechanism (formerly fund category)**: This indicates the manner in which the University will receive funding.

- **Grant**: Most common method. Funds are given for the purpose of research or training without the expectation of a tangible deliverable.

- **Co-op Agreement**: A formal written contract which has a set timeline of deliverables and includes significant involvement of the awarding agency throughout the project.

- **Contract**: A formal written agreement which has a set timeline of deliverables and payment.

- **Sub-Contract**: Another institution (the Prime) has received an award and a CWRU PI will perform a portion of the work here. CWRU will be paid by the Prime from funds received as part of its award.

- **Other**: Any sponsored funds that do not fall into any of these categories.

- **Gift/Donation**: Usually received from a person who wishes to give funds to a particular school or investigator to work on a specific topic.
Award Type: Choose the option from the drop down menu that best fits the proposal that is being submitted.

- **Research**: Projects that entail a systematic, intensive study intended to increase knowledge or understanding of the subject studied, a systematic study specifically directed toward applying new knowledge to meet a recognized need, or a systematic application of knowledge to the production of useful materials, devices, and systems or methods, including design, development, and improvement of prototypes and new processes to meet specific requirements.

- **Training**: Awards designed to support the research training of scientists for careers, as well as help professional schools to establish, expand, or improve programs of continuing professional education.

- **Special**: Typically used for funding that supports a specific event or center and does not have a specifically designed workflow, such as conferences or centers.

- **Discretionary**: Funding which is provided to the University with no specific requirement as to how it should be spent and does not have any reporting requirements.

- **Service**: Projects that are considered to be commercial transactions, also called “fee-for-service”, typically will not create new intellectual property, must be based on fair market rates for the services, facilities, or deliverables in question, rather than based on reimbursement of project costs.
**Project Subtype**: These fields should be used for specific types of proposals that carry with them special requirements that need to be known and acknowledged by all interested parties, such as the Department Chair, Dean or the university, at the time of the application. In most cases, these types have atypical program requirements such as limits on indirect costs, salary caps, or mandatory cost sharing.

- **Career Development**: Award for those new to research. Limits salary support and concurrent other duties/research funding.
- **Equipment Only**: Funds that are specifically for large equipment. No indirect costs are recovered on equipment awards.
- **Fellowship/Scholarship**: Any award that provides stipends and/or tuition for students or pre/post doctoral fellows.
- **Clinical Trial**: An award that aims to test a new treatment in human patients.

**Research Type**: If the answer to question 12, was "Research", then you should specify the type of research it will be:

**Basic** research is the pursuit of new scientific knowledge or understanding that does not have specific immediate commercial objectives, although it may be in fields of present or potential commercial interest.

**Applied** research applies the findings of basic research or other existing knowledge toward discovering new scientific knowledge that has specific commercial objectives with respect to new products, services, processes, or methods.

**Development** is the systematic use of the knowledge or understanding gained from research or practical experience directed toward the production or significant improvement of useful products, services, processes, or methods, including the design and development of prototypes, materials, devices, and systems.
Primary Project Location and Building: From the list, choose the site where the bulk of the project will take place. If it is split more or less equally between two or more locations, use Control to select multiple locations. Please note that this is not where the administrative offices are located, but where the research is being done.

Special Requirements: Check if any of the following apply to the proposal:

- Cost Sharing: Check if any cost sharing (mandatory or voluntary) is included in the proposal
- Space: Check if space, other than that already available to the PI, will be needed for the project
- F & A Waiver or Reduction: If this is a federal grant and the indirect cost rate is less than 57%, or if this is a grant from any sponsor where we are asking for a lower rate than it normally gives, then you must answer yes to this question.
- Subaccounts: Will subaccounts be needed if this grant is awarded?
Peoplesoft Speedtype or Current Account Number
Agency Award Number
Previous Submission Date
Previous Submission Status
Contract Number

- These are all used when a proposal has been previously submitted and either funded or not. You can find all of this information in PADS.
Section B. Key Personnel

Key Personnel: Accurate tracking of Key Personnel and effort is a requirement of the Federal government. Though the Sponsor may not be Federal, the University is required to treat all sponsor funds consistently, and therefore, effort is collected and reported on all sponsored projects.

You will add Key Personnel in much the same way you added a PI or a Sponsor. First, click the drop down menu (first red arrow) and see if the people that you need are in the list. If so, click on their names, and then answer the questions regarding Conflict of Interest and Involvement with Human Subjects and effort.

If the person you need to add is not on your drop down list, you will search for that person by clicking the search button (second red arrow). You will be taken to the same search dialog box that is used for PI or Co-PI, but once you have selected someone, they are added to your drop down list. You will still need to select them and then answer the human subjects, financial COI and effort questions.

To add additional people click the update button (second red arrow) to add the current person and get a blank input form for a new person. To remove a person, click on the “Remove Key Person” and click on the Update button.
Section C. Budget

Sponsor Deadline Date: This is the date that the proposal is due to the Sponsor. You will find this information in the FOA.

Please note that your eURF and all supporting documentation should be routed at least 5 business days before the Sponsor deadline. Please allow yourself extra time, as your management center Research Office will not sign off on a proposal without this.

Budget Start Date: Enter in the proposed start date of the project. If the proposal is a Continuation, enter the start date for that budget period.

Project Duration (Yrs): Enter in the total number of years of the proposed project. If the grant uses a budget cycle other than a year, enter in the number of budget cycles. For example, a grant with two budget cycles, each lasting 18 months should enter “2” for the project duration, not “3”.

Indirect Cost Rate: Enter the appropriate percentage based on the project.

- **Negotiated Federal Rate:** To be used if the proposal will be submitted using the Federal Rate that is found on ORA’s “Commonly Requested Information” sheet.
- **Other:** If the Sponsor limits indirect cost recovery to a percentage, enter that percentage.
- **Note:** If the Sponsor limits the dollar amount, convert that to a percentage and explain in the Comments section.

**Budget Detail:** Use the boxes to enter in the total project budget, period by period.

1. **Budget Year:** Simply the year – 1, 2, 3, 4, etc.
2. **Direct Costs:** Enter the total direct costs for that period. Note that this will include any indirect costs for a subcontractor as well.
3. **Indirect Costs:** The amount of indirect cost that will be charged based on the budget.
4. **MTDC:** Modified Total Direct Cost - Total direct costs less any exceptions.
   a. **MTDC = Total Direct Costs – Exceptions**
      i. The most common exceptions are (the FOA will list any restrictions):
         1. Equipment over $5000
         2. Tuition
         3. Subcontractor funds over $25,000
         4. Patient Care costs
5. **Cost Share:** List and Mandatory or Voluntary cost share proposed.

**Space Costs:** This question is similar to question [A 15b] regarding additional space, but this question is asking if funds from the grant will be used for renovations or construction.
Section D. Research Compliance

Human Subjects: Check the appropriate box regarding human subjects involvement in the project. If the answer is yes, and you are not invoking 45 CFR 46 Section 118 (see below), then you will need to add the following information:

- IRB Drop Down: Select the IRB to which the protocol will be or has been submitted.
- Expiration Date: Enter the date if you have one, if not leave blank and check “Pending” box below. Use “Pending” even if IRB has not been submitted for review.
- Protocol Number: Enter the protocol number assigned by the IRB office, if available.
- Click “Update” and the information will appear in a blue box above the entry section. You will now see a new option to remove the protocol if a mistake has been made. To remove, click the check box next to the IRB that you want to remove and then click the “Update” button. Repeat for every IRB protocol on the project.

If yes checked above….: If there is an IRB protocol required on the project, check if 45 CFR 46 will apply:
• **45 CFR 46 Section 118:** Check if the proposal call for involvement of human subjects, but the type of human subjects research is unknown at the time of proposal. Find the CFR citation here: [http://ecfr.gpoaccess.gov/cgi/t/text/text-idx?c=ecfr&sid=d7b3922a1e2c8337baff06db962a1438&rgn=div8&view=text&node=45:1.0.1.1.25.1.1.16&idno=45](http://ecfr.gpoaccess.gov/cgi/t/text/text-idx?c=ecfr&sid=d7b3922a1e2c8337baff06db962a1438&rgn=div8&view=text&node=45:1.0.1.1.25.1.1.16&idno=45)

**Animal Subjects:** Indicate whether or not live vertebrate animals will be used on the project.
- If yes, provide the Expiration Date and Protocol Number. If unknown, check “Pending”.
- You may enter as many IACUC protocols as needed. To add additional protocols, enter the first protocol and then click the “Update” button.

**Recombinant DNA:** Check whether Recombinant DNA will be used.
- If yes, check the appropriate IBC approval status.
- You may enter as many protocols as necessary. To add additional protocols, enter the first protocol and then click the update button.
**Export Control Issues:** Answer the questions regarding Federal regulations concerning the export of sensitive information. For more information regarding these issues, refer to the Export Control section of the Office of Research Administration website, [http://ora.ra.cwru.edu/ospa/forms/index.cfm#export_control](http://ora.ra.cwru.edu/ospa/forms/index.cfm#export_control).

**Special Hazards:** Indicate whether there are any “Special Hazards” involved in the project. Use the checkboxes to indicate which hazards will be used during the course of the project, if applicable.
Stem Cell Research: If you are using human embryonic/pluripotent cells or their derivatives, you must indicate the Stem Cell Research Office (SCRO) protocol number that you are using.

If you are using stem cells, and have not filled out an application for the SCRO, click the hyperlink to bring up the application.
Section E. Intellectual Property.

Intellectual Property: If this research has utilized intellectual property developed either here at CWRU or at another institution or employer, or if it utilizes intellectual property assets that use an MTA or other agreement, then answer “yes” and describe in the box below.
Section F: Key Words

Key Words: Select a keyword or keywords from the list that best describes the project, or start typing the name to search the list. Click “Add Key Word” to complete the process. The keyword will appear in the blue list to the right. Add as many keywords as necessary. If a word has been added in error, check the box next to the incorrect word and then click the “Remove Key Word” button.
Finishing the eURF

Comments: Add any relevant comments that any approvers and/or the university should know about the proposal. This would include information about anything that may be outside the norm or specific setup information that OSPA would need to know for set up of the award.

This is all the basic information that you need to include on the eURF. You are now ready to take the final steps to eURF completion using the buttons at the bottom of the page.

Save: This will save the document and keep you at your current place on the eURF. You can save your progress as many times as you wish as you complete the form.

Save and Return to Main Page: Clicking here will save your progress and return you to the Spiderweb eURF page with the tabbed boxes.

Save as a Template: If you do many eURFs that contain much of the same information, you can save a pre-populated eURF as a Template. Simply add in as much static information as possible and click Save as Template. This eURF with the saved information will now show up in the “Templates” tab of the main eURF page.

View Printable Form: While the university no longer requires the printed form, many people like to keep a hard copy for their files. Clicking on this button will generate an eURF that is in the same format as the previous paper version, however there are no signature lines on the form.

Discard: If you determine that you no longer need the eURF, click discard to remove it from the system.

Check for Errors: To make sure that you have included all the required information, click here. If something is missing, a note will appear letting you know what required information is needed to continue.
**Route for Signatures or Send Back:** This sends the eURF along on the predetermined approval routing. Once clicked, you have the option of moving the eURF to the next approver, or back in the approval process for corrections or other clarifications.

**Completing the Process and Submitting**
Once all the information is complete in the form, take the following steps to submit the eURF.

1. Save your progress at any time by clicking “Save”. If you need to come back to the project later, it will now be in the “In Progress” tab on the eURF main page. If you know the eURF number, type it in the search bar and the proposal will appear. If you don’t remember the number, scroll through until you find it. Click on the eURF and then click “Show”.
2. Click the “Check for Errors” button to see if there is any missing required information. After clicking, the system will bring the eURF back up to the top of the page and list any errors in red.
3. When all is complete and there are no errors, begin the routing process by clicking “Route for Signatures or Send Back”. This will begin the approval process. Spiderweb has the routing pre-loaded into the system based on the department listed on the eURF.

**Approvals**
The first route is always the listed PI, then the appropriate approvers. If the PI also prepared the eURF, then the PI will not receive an email saying that an eURF is waiting. The approvers will receive an email stating that their approval is needed in Spiderweb. However, it is always a good idea to let the approver know that the eURF is waiting for them, since email can be unreliable. When logging into Spiderweb, the approver will see that the eURF is waiting.

Clicking on the “View” link will let them look at the eURF entry screen and allow them to make any changes. It is always a good idea to note any changes in the comment box at the bottom of the page. Always remember to save.

At this point, the PI has the option of continuing the routing process or sending the eURF back to the previous person (in this example, the person who created the eURF).

Clicking on the “Route for Signatures or Send Back” button will bring up the Signatory screen, which gives the approver a number of options.
Looking at the top of the page, there are a few links that give the approver some choices.

- **eURF Home**: Brings the user back to the eURF home page as seen on pages 4 and 5 of this guide.

- **Signatory**: Brings the user back to the Signatory Form page.

- **Email**: Clicking here will bring up a page that allows the user to send an email message to someone else in the routing process. (see next pages for explanation)

- **Routing**: This will show you the predetermined route for the eURF. Here, you can add any necessary approvers to the existing route. (see next pages for explanation)

To simply approve and move the eURF along the predetermined route, click “Sign”.

If the approver finds that the eURF requires revisions before approval is possible, he/she can click on “Send Back”, and this will send the eURF back to the previous level. It’s a good idea to add in a comment explaining why this was done.
**Note on Routing**: As you will see later, if additional approvers are necessary, you can add them to the route in the Spiderweb system. However, it is also acceptable to print out a hard copy of the eURF and have the additional approvers sign off on the hard copy. This hard copy can then be scanned and attached to the eURF as proof that the additional approver has seen the eURF, rather than adding them to the predetermined route.

Email link

If you need to send an email with any eURF specific comments, take the following steps:

1. Click the checkbox next to the name of the person/people that you would like to receive the message.
2. Type your message in the box.
3. Click “Send Email”
There are a number of reasons to add a person to the route of an eURF. The most common are:

- The sponsor is a Foundation.
  - In this case Foundation Relations should be added to the approval route. This can be done by clicking the “Add Foundation Relations” button. Foundation Relations will be added into the route directly before the institutional signoff. The button will then change to “Remove Foundation Relations” that can be clicked to take this step out of the routing.

- The project will be conducted in more than one management center.
  - If the project will involve more than the Dental School (for example, the School of Medicine), the eURF should be routed to that Management Center as well. If the additional approver is not in your drop down menu, enter in all or part of the person’s last name in the search box and click “Search”. Once the Search Results appear, click on the button next to the appropriate person, select the position, then click “Add to Route”.

- Management Center Approvers:
- School of Medicine: Robin Bissell
- School of Engineering: Deborah Hamzah
- Arts and Sciences: Denise Donahey
- School of Nursing: Margaret Roudebush or Ivy Ko
- MSASS: Richard Cole
- School of Law: Crystal Taylor
- Weatherhead: Sharon Martin or Kim Linger

Make sure you click the circles next to the person you want to add and their place in the routing.
If you have added someone in error, click on his/her hyperlinked name to bring up the Delete screen.

**Update or Delete a route segment for a currently active eURF**

<table>
<thead>
<tr>
<th>Detail</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Person</td>
<td>Denise Donahay</td>
</tr>
<tr>
<td>Organizational Unit Name</td>
<td>Dean - Arts &amp; Sciences</td>
</tr>
<tr>
<td>Required</td>
<td>Yes</td>
</tr>
<tr>
<td>Level</td>
<td>4</td>
</tr>
<tr>
<td>Date Notified</td>
<td></td>
</tr>
<tr>
<td>Date Signed</td>
<td></td>
</tr>
</tbody>
</table>

- On the Delete Screen, click on “Delete”. After you click, you will be prompted to verify the delete. Click “Verify Delete” to remove the person from the route.

As the eURF makes its way through the approval process, approvers will receive emails stating that their approval is needed.

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**An electronic university review form is ready for your signature.**

- **Title:** Dental School eURF Tutorial
- **Project PI:** Tricia Mehosky Ribeiro
- **Department:** General
- **Sponsor:** NIH General (For Proposals ONLY)

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Spiderweb may be reached at [http://spiderweb.case.edu](http://spiderweb.case.edu)

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You can find out where the eURF is in the approval process by going into the main eURF page on Spiderweb. The proposal should now show up in the “eURFs in the Routing Process” box on the “Routed for Others” tab at the top of the page.
Click on the eURF and then “Route for Approval”. This will bring up the routing screen and you will be able to see where it is in the process. You can then send emails if needed to attempt to move things along.

Once the eURF has made it through all the approvals and has been approved by the university, the PI, Departmental Administrator and management center, you will receive notification that it is complete.

An electronic university review form has been signed off by the Office of Sponsored Project Administration.

Title:
Project PI:
Department:
Sponsor:
Date Signed Off:

Spiderweb may be reached at http://spiderweb.case.edu

These parts will show your project-specific information as listed on the eURF.

The eURF will now be available for review under the “Completed” tab at the bottom of the eURF Main Page.
When the proposal is awarded, Research Administration will pull the appropriate eURF from Spiderweb and set up the award based on the information contained there and in the award notice. Therefore, if you are aware of any changes that will impact the setup of the speedtype, please notify Research Administration.