RESEARCH ADMINISTRATION PORTAL (WRAP)

Department Review Quick Guide

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Overview

This quick guide is designed specifically for this training session, providing step-by-step instructions for participants responsible for conducting College or Unit Reviews using the WRAP system. It focuses on reviewing a funding proposal from a college or unit, requesting changes from the proposal team, and submitting a department review of the funding proposals for further specialist review. The steps are intended for training purposes, and participants are encouraged to make their own adjustments during the session as needed.

Steps

Access

Training (Staging) Access

1. Navigate to WRAP Electronic Research Administration Systems: https://researchoperations.wvu.edu/resources/administration-and-compliance-systems
2. Click the **WRAP Test** button.
3. Click the **Client Login** button.
4. Sign in with your SSO credentials

Production Access

1. Navigate to WVU Research Operations Website: https://researchoperations.wvu.edu/home
2. Click the **WRAP** button.
3. If prompted sign in with your SSO credentials

WRAP Dashboard Terms & Definitions

- **Create Menu:** Create drop-down menu buttons that allow you to create various items in the system, such as proposals or agreements
- **Recent: L**ists the last several items a user has accessed, with the most recent at the top. Items can be pinned for quick access using the pin icon.
- **Pinned:** Pinned items are stored for easy access, regardless of when they were last viewed. Pinned items remain until manually unpinned.
- **My Inbox:** Displays all items requiring user action to move forward in the workflow e.g. proposals, agreements, and awards.
- **Assignments:** Displays workload volume and assignments.
- **In Process**: Summarizes your assigned volume by state (Draft, Department Review, Pending Sponsor Response, Pending Team Response).
- **State Column:** Shows item workflow status and helps guide the next steps.
- **Personalize Table:** Users can adjust table settings using the gear icon, enabling them to configure the columns and data that appear. They can also export data to CSV files.
- **Top Navigator:** The main navigation tool at the top of the dashboard allows users to move to different parts of WRAP.
- **Breadcrumb Trail:** Located under the top navigator, this trail indicates the current page and allows users to navigate back to previous pages.
- **Filter by Text:** Type the first part of the text you want to find. Use % as a wild card. Users must prepend the '%' wildcard before entering search terms (e.g., '%defense') when using the search function. Add a prompt or help text instructing users to use a wildcard before typing search terms.

Access the proposal for review

There are two ways to access the proposal for review:

Email Notification: After January 16, when we go live, you will receive an email notification each time the Principal Investigator (PI) submits a funding proposal for department review. You can then click the link in the email or access the proposal directly from your grant inbox. Note that for this training, we are using a staging instance that does not send email notifications.

Dashboard Inbox: For this training, once logged in, you will land on your Dashboard Inbox page. Here, you will find several proposals in the Department Review state, which we will be using for this session. Locate the proposal with your initials and open it to begin.

Now, we will dive into reviewing a funding proposal from a college or unit perspective. Please click on the funding proposal labeled with your last name.

RESEARCH ADMINISTRATION PORTAL (WRAP)

Funding Proposal WorkSpace Terms & Definitions

1. **State:** Located at the top left of the workspace, this indicates the current stage of the funding proposal in the workflow process. (e.g., Draft, Department Review).
2. **Activities:** Actions you can take depending on the proposal's state. This is based on the user role assigned to the proposal.
3. **Proposal Title:** The title of the research proposal.
4. **Proposal Information:** Key details about the proposal, including PI, department, submission deadline, etc.
5. **Proposal Number:** Unique identifier for tracking.
6. **Budget Information:** Snapshot of budget details, including start date, number of periods, and direct and indirect budgets**.**
7. **Workflow:** A visual representation of the funding proposal's progress, highlighting the current step in the process in orange.
8. **Budgets:** Lists all budgets related to the funding proposal, including sponsor and cost-sharing budgets. Displays the budget state and funding source.
9. **SF424 Summary:** Key information for federal grant submissions to grant.gov (system-to-system). Snapshot of budget details, including start date, number of periods, and direct and indirect budgets.
10. **History**: Lists all activities performed on the funding proposal, including the details of who performed them and when.
11. **Reviewers**: Displays the key personnel and department reviewers responsible for approving the funding proposal. Lists the levels of department approval required. Also shows ancillary reviewers added to the funding proposal and whether their review is required. Indicates if they have completed their review.
12. **Attachments**: Contains links to documents added to the funding proposal workspace. Users can open attachments by clicking on the document links.
13. **Financials:** Displays the expenses for each budget period. By default, totals from all associated budgets are rolled into a single total on this tab.
14. **Reviewer Notes:** Shows notes from reviewers to specific pages of the funding proposal during their review.
15. **Related Projects:** Linked projects to the proposals, e.g., agreements.
16. **Change Log:** Shows all log changes made to the funding proposal or SF424 pages.

Exercise #1: Review a Funding Proposal from a College or Unit Perspective

Note: For this training, these proposals will not be from your actual WVU department; they have been set up specially for this Training session.

Review Funding Proposal

1. In the workspace, click on **Review Funding Proposal** to open the proposal details.
2. Navigate through the proposal by reviewing each page for **accuracy** and **completeness**. Scroll through each page, clicking the box on each to indicate that you have finished reviewing the information on that page. To add comments or request changes, click the **note icons** (word bubble icon) on the right side of the page. You can add notes for the entire page or specific

sections, e.g., ask the project team to confirm the start date of the proposal. Indicate that a response is required – this will force the proposal creator to address your comment before sending it back for review. **Check the box** to mark the page as reviewed.

Budget

3. Click on the **Budget Name** in the proposal workspace to review the **budget details**. Navigate through the budget sections using the tabs and click **View Budget** for detailed review. Make notes on any issues or questions regarding the budget.

Cost-Share

Note: When viewing the cost share budget you can easily see the total amount of cost share the project team is including in their proposal in the **Grand Total** field on the Budget Workspace.

4. Once your review is complete, navigate back to the Proposal Workspace.

Exercise #2: Submitting an Ancillary Review

Because this proposal includes cost share, the project team has added a **Cost Share Approval** ancillary review to the proposal to garner approval from you (the department).

1. From the proposal workspace, click **Submit Ancillary Review** to view the cost share approval request.
2. In the **Submit Ancillary Review form**, select the ancillary review to submit.
3. **Do you accept this submission?** Select whether the reviewed project is acceptable as-is.
4. **Is the ancillary review complete?**
    1. Select **Yes** if the ancillary review is complete, e.g., if the cost share amount was reasonable
    2. Select **No** if the ancillary review is not complete and requires corrections or clarifications in the field.

    Note: For this training, click **Yes** to indicate that your review is complete.

5. Add any comments and supporting documents you think necessary, then click **OK**.

There is **no need to contact the project team**, they **will be notified automatically** when you complete the review.

Exercise #3: Request Changes from the Proposal Team

If you find issues or require additional information, add **reviewer notes** to the relevant sections and use the **Request Changes** activity to send the proposal back to the PI for revisions.

1. From the proposal workspace, click **Request Changes**, type a comment (e.g., let them know which field(s) you require changes on and indicate that you reviewed their cost share

request. If the PI has not certified the proposal yet, you can remind them to do so here as well (check the "Certified" field on the Funding Proposal Workspace)
2. Click **OK** to notify the proposal team.
3. Confirm success by verifying:

   - The proposal is in the **Department Review: Response Pending from PI** state.

The History tab shows the **Changes Requested by Department** activity with the reviewer notes.

Once the PI has responded, review the funding proposal and all the comments from the PI

Exercise #4: Submit a Department Review

After reviewing the proposal and approving the ancillary review, we will now submit the department review to move it forward to the next stage for specialist review.

1. Open the funding proposal.
2. **If the proposal is ready to move forward**, click **Approve** from the proposal workspace
3. Type comments for the next reviewer if desired. Click **OK** to approve.
4. Confirm success by checking:
   - The funding proposal has moved to the **Specialist Review** state.

The History tab shows the department review approval and any associated notes.