

Southern Research Institute
Instructions for Using Proposal Tracker
Proposal and Initiation Sheet Part I (PIRS I)

Southern Research uses the Tracker System to track proposal actions, assign proposal charge numbers, and notify various departments of the intent to bid. Specifically, completion of the Proposal Initiation and Review Sheet (PIRS I) is to be completed by the Proposal Manager (PM) after an opportunity has been identified and the bid decision has been made. To access the Tracker System and the PIRS I form, the following link can be used <http://tracker/>. The link is also provided on SRInsider under "Contract Administration" or "Popular Links."

ACCESS: Contact Nancy Thompson from Contracts, at extension 2420 to set up an account to access the tracker system. Please provide first name, last name, email address. A return email with your User Name and Password will be sent.

LOG IN: Using the information provided in the return email, log-in and choose "New PIRS I".
Please note that the person logging in to obtain the proposal number will also have to initiate the PIRS II form when it is prepared.

COMPLETION OF FIELDS:

- a. Provide the general Proposal Information. Please identify the lead department and lead Proposal Manager (PM.) If multiple departments will either work on the proposal or have effort included in the proposal, check the box located beside "Other departments will be working on this proposal or have effort proposed as part of this proposal." All departments and managers available for selection are included in drop down menus. **After each department is added, please be certain to click the "ADD" button.** A proposal charge number will be assigned for each department selected. The Lead PM is responsible for providing the proposal charge number(s) to all personnel working on the proposal.
- b. Please select the Client Type and Contract Type.

SUBMISSION: Click the Submit button at the bottom of the page and the form will be submitted directly to Contracts.

CHANGES: CHANGES TO THE PIRS I CANNOT BE MADE AFTER THE FORM HAS BEEN SUBMITTED TO CONTRACTS. Please contact Nancy Thompson at extension 2420 if changes to the form need to be made after submission.

PROPOSAL CHECKLIST: The Contracts department will email a copy of the Proposal Checklist along with the assigned proposal number and charge numbers for the proposal team. The checklist will include items to be considered during proposal preparation as well as the functional specialists that will be able to assist you in the various areas. Please note that all proposals require the export control certification approval. The approving official's contact information is included in the checklist. The required certification form is located on the SRInsider at:
<http://srinsider/iso/eco/Exp%20Form%201.3%20Export%20Control%20Review.pdf>.

Proposal and Initiation Sheet Part II (PIRS II)

When the proposal is ready for final review prior to submission, the PM completes the PIRS II. To access PIRS II, log into Proposal Tracker, and select “New PIRS II.” **REMEMBER THAT THE PREPARER OF THE PIRS I WILL HAVE TO INITIATE THE PIRS II FORM AS WELL.** Choose the correct proposal from the list provided. Based on the information submitted on the PIRS I, certain information will be pre-filled. This may include the proposal number and charge numbers for the various groups identified as those who will perform work on the proposal.

COMPLETION OF FIELDS: Required fields are marked by an asterisk (*). Please indicate if the proposal has been submitted under the Quick Quote Process by checking the appropriate box. Include a validity date for the proposal. All commercial proposals should generally include language that states that the proposal is valid for a period of 90 days from the date of submission. Proposals in response to government solicitations normally have mandated validity periods. The government-required validity date should be included on the PIRS II. If you have trouble determining an appropriate validity period for your proposal, please contact your contract administrator.

EXPORT CONTROL REVIEW: “Has the Export Control Review been performed” question must be answered. The Export Control Review and Certification form is **mandatory** for all proposals and must be completed, submitted, and a copy uploaded into PIRS II. As stated in PIRS I paragraph 6, the Export Control Review and Certification form is available on SRInsider under “Export Control.”

IDENTIFICATION OF APPROVAL LEVELS: The requestor should identify all approval levels required on the proposal in accordance with Division requirements. These approvals should include the appropriate Division level management, the Contract Administrator responsible for the proposal, and the Director of Contract Administration.

ATTACH PROPOSAL FILE: Select **Proposal File Management to attach the proposal files that are to be sent with the PIRS II form.** Select “**UPLOAD**” and either type in the file address and name or use the browse function. Attach the final version of the proposal for review and approval. Do not include any salary information (rates or salaries listed by employee name). Click the SUBMIT button.

PROPOSAL APPROVAL: Emails will be sent to all “approvers” notifying them that a proposal is awaiting review. A link to the PIRS II and associated file(s) is included in the email. Approvers may select the **Proposal File Manager** to be taken to the proposal files that need to be reviewed. After review, the proposal can be approved or rejected by clicking the appropriate button. Email notification will be provided to the requestor and all other reviewers.

REPORTS: Reports are available online. The summary level report shows data at the top level for each proposal with only the lead department identified. The detail level report identifies all departments working on the proposal and the proposed amount of effort for each. All Proposal Tracker reports can be easily downloaded into Excel by using the “File/Save As” function for easy sorting.