



## Sponsor Look-up / Company Profiles / Request New Sponsor

When starting a proposal, or contemplating a proposal, it is important to identify whether the sponsor exists in our system; and, if not, to request a new sponsor set-up.

All new sponsors are created in eSRA and then automatically sent to RAPID. eSRA and RAPID remain in synch.

A. Look-up a Sponsor in Company Profiles	<ol style="list-style-type: none"> <li>1. Select Company Profiles from Home Page</li> <li>2. Sort by Headings</li> <li>3. Search Using Filters (Basic or Advanced)</li> </ol>
B. View Sponsor Profile Details	<ol style="list-style-type: none"> <li>1. Click "Name" to see the Sponsor Profile</li> <li>2. Click "View Organization Profile" to view all the information available about this Sponsor</li> </ol>
C. Request New Sponsor	<ol style="list-style-type: none"> <li>1. "Request New Sponsor" from Home Page</li> <li>2. Enter basic information about the Sponsor Sponsor Name (required) Website URL, if available Reps and Certs (or explanation) Public Comments</li> <li>3. Request will be saved in "Sponsor Review" state</li> <li>4. Sponsor Administrator may request additional information</li> <li>5. You should be notified by email when the request has been approved and the new sponsor is active</li> </ol>

### IMPORTANT INFORMATION

Sponsors are identical in eSRA and in RAPID where a field exists in both systems. Each system contains additional information not required by the other system. RAPID contains billing information. eSRA contains multiple names for a sponsor such as acronyms and "also known as" names to assist with locating a sponsor.

This procedure contains specific steps and screen prints for reference.

The front page can be used for quick reference guide.

Caution Warning	Serious Warning	Notes	Tips	Important

## A. Look-up a Sponsor in Company Profiles

- Select Company Profiles from Home Page



### Company Profiles

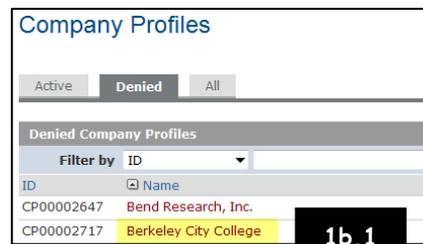
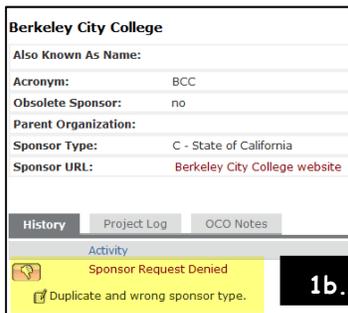


- The "Active" tab contains Sponsors that have been set-up activated in RAPID, including sponsors that might now be obsolete.

Active Company Profiles									
Filter by ID <input type="text"/> <input type="button" value="Go"/> <input type="button" value="Clear"/> <input type="button" value="Advanced"/>									
ID	Name	SmartForm	Date Created	Obsolete	RA ID	ID	Country	Acronym	Also Known As
CP00000007	3M Company	[Edit]	2/21/2012 12:50 PM	no	PM	310			
CP00002582	3Party DOW ORNL	[Edit]	8/13/2012 9:10 AM	no	KP	001			
CP00000008	4th WAVE IMAGING INC	[Edit]	2/21/2012 12:50 PM	yes	SF	700			

- The "Denied" tab shows sponsors where a request was made, but during the review process it was determined that a sponsor already exists, or was denied for any reason.
  - Click on the name to see details of the Profile.
  - The History section should provide the reason the new sponsor request was denied

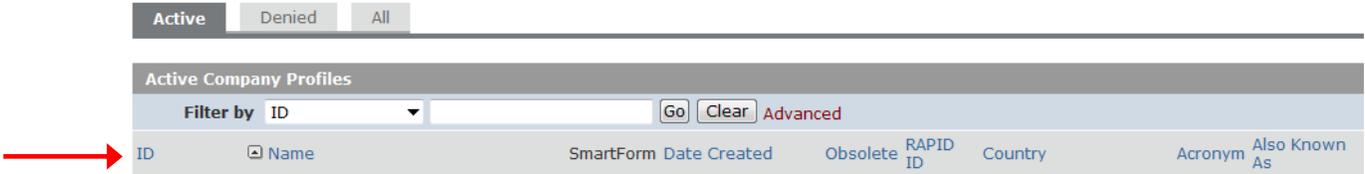
- All Company Profiles will also show Sponsor Requests being reviewed. Sort by "State." "Sponsor Review" requests will sort to the top of the list.



2. Sort by Headings

2a. Click on any heading and the entire list will sort alphabetically by that field. Click again for reverse alphabetical sort.

### Company Profiles



3. Search using Filters

3a. A basic search can be performed on any heading using Filters.

3b. Click on the arrow, then select the heading to use for your sort.

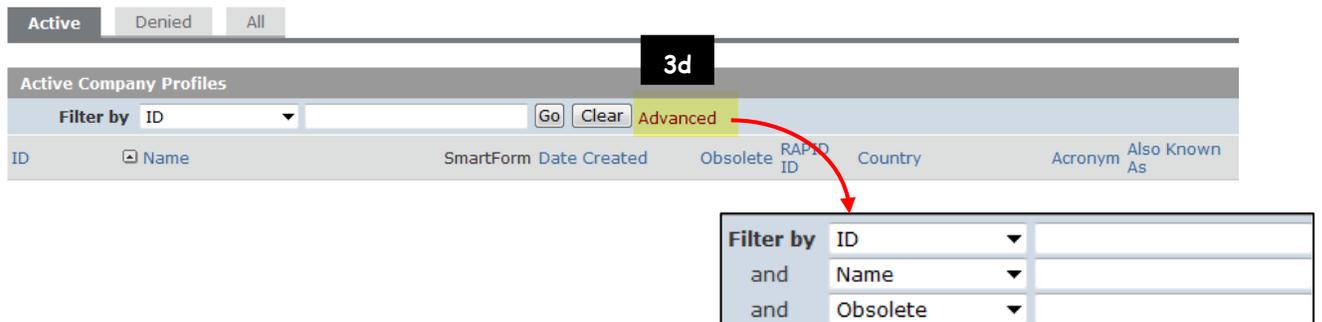
3c. Type the parameters of the search. % is a wildcard

### Company Profiles



3d. Create an advanced search using multiple filters.

### Company Profiles



## B. View Sponsor Profile Details

1. Click "Name" to see the Sponsor Profile

1a. Summary information will be displayed.

1b. History, as provided by the Sponsor Administrator, if any, will be viewable.

### Company Profiles

Active Denied All

Active Company Profiles

Filter by ID

ID	Name
CP00000007	3M Company

Sponsor Created

View Organization Profile

### 3M Company 1a

Also Known As Name:	Company Profile #	CP00000007
Acronym:	Date Created:	2/21/2012 12:50 PM
Obsolete Sponsor: no	Last Modified Date:	5/2/2012 4:38 PM
Parent Organization:	Country of Ownership/Control:	
Sponsor Type: P - Domestic Private Industry	RAPID Sponsor Code:	PM310
Sponsor URL:	DUNS#:	

History Project Log

1b

2. Click "View Organization Profile" to view all of the information available about this Sponsor.

- 2a. Scroll through all the information using the "Continue" button.
- 2b. "Jump To" a specific View of information for quicker access if you know exactly what information you need.

### C. Request Sponsor



Search in a variety of ways, with minimal information and use the % wildcard before requesting a new sponsor.

1. "Request New Sponsor" from Home Page



"Request New Sponsor" is only available to Resource Analysts, OSPIP Contracts Officers, and OSPIP Sponsor Administrators.

2. Enter basic information about the Sponsor.

2a. "Sponsor Name" is the only required field.



2b. Also provide the website URL, if available.



2c. The completed Reps and Certs should be attached to the Request for New Sponsor if available, or make a note about whether it has been sent to the sponsor and when.



2d. "Public Comments" entered here will be available to everyone that has access to Company Profiles and will remain with the Company Profile's final record.

2e. Help text is provided to the left in Gray.

2f. Click "OK" when done.

**eSRA Proposal System**

LAWRENCE BERKELEY NATIONAL LABORATORY

STAGING

U.S. DEPARTMENT OF ENERGY

New: Organization Profile

Print...
2f
OK
Cancel

**Sponsor Request Form**

1.a \* **Sponsor Name:**  2a

1.b **Also Known As:**

1.c **Acronym:**

1.d **Sponsor Website URL:** [None]  2b

1.e **Sponsor Contact Information:**

1.f **State/Province:** -- Select One --

1.g **Zip Code:**

1.h **Attachments:** 2c  
  

Document	Description
There are no items to display	

1.i **Public Comments:**  
 2d

Name of the sponsor. If this is a foreign sponsor, use the English language name. Please don't abbreviate.

Another 2e the sponsor (if any). If this is a foreign sponsor, type the language name. If the sponsor is a DOE M&O Contract, type the name of the DOE Laboratory in the 'Also Known As' field.

For example "IBM". Restricted to 10 characters.

This can be a signature block from an email. It does not need to be a full street address. It can contain name, title, company, email, phone, mailing address etc. This information may be used by the Sponsor Administrator to contact the organization to obtain further information on the type of sponsor.

If this is a foreign sponsor, please list the country in the contact information.

For U.S. or Canadian addresses, please specify the state or province.

For U.S. zip codes or foreign postal codes (such as Canada). For U.S. Addresses, please include the 9 digit zip code (5+4). **Lookup +4 Zipcodes**

Upload Reps and Certs or other sponsor-related documents relevant to the identification of or history of the sponsor. This information will be used to determine the type of sponsor.

Add any additional information that may help identify the sponsor or the reason a new sponsor record is being requested. For example, company X and company Y merged and are now company XY.

3. Request will be saved in the "Sponsor Review" state.

**Sponsor Review**



- 3a. Sponsor Administrator will be notified by email that a new request has been made. The request will also show in the inbox for the Sponsor Administrator.
- 3b. Sponsor Administrator will review the request, check for duplicates and may ask the RA or OSPIP CO to obtain the Reqs and Certs, if the sponsor is a company located in the U.S.
- 3c. You can track the status of your sponsor requests in the "My Sponsor Request" tab in your home workspace.

My Inbox	Proposals	Awards in Preparation	Awards	Award Mods	<b>My Sponsor Requests</b>	<b>3c</b>
My Sponsor Requests.						
Filter by		ID	<input type="text"/>	Go	Clear	Advanced
ID	Name	SmartForm	State			
CP00002604	Test new Sponsor Request	[Edit] <input type="checkbox"/>	Sponsor Review			
CP00002595	test new sponsor pb	[Edit] <input type="checkbox"/>	Sponsor Created			
CP00002594	PB Test Sponsor	[Edit] <input type="checkbox"/>	Sponsor Created			

4. Sponsor Administrator may request additional information

**Sponsor Admin Requesting Information**

- 4a. If Sponsor Administrator requests additional information, the requester should be notified by email and the request will show in the "My Sponsor Requests" tab in the state of "Sponsor Admin Requesting Information"
- 4b. Click on the "name" to go to the New Sponsor Workspace.

My Inbox	Proposals	Awards in Preparation	Awards	Award Mods	<b>My Sponsor Requests</b>
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My Sponsor Requests.

Filter by ID

ID	Name	SmartForm	State
CP00002604	<b>Test new Sponsor Request</b>	[Edit]	Sponsor Admin Requesting Information
CP00002595	test new sponsor pb	[Edit]	Sponsor Created
CP00002594	PB Test Sponsor	[Edit]	Sponsor Created

- 4c. Comments from the Sponsor Administrator (which also appear in the email you received) will be in the history section along with any attachment the Sponsor Administrator might include.
- 4d. Click on "Submit Information" button to provide the additional information that was requested.

**Sponsor Admin Requesting Information**

**My Activities**

**Test new Sponsor Request**

Also Known As Name:	Company Profile #	CP00002604
Acronym:	Date Created:	6/21/2013 12:54 PM
Obsolete Sponsor: no	Last Modified Date:	6/21/2013 12:56 PM
Parent Organization:	Country of Ownership/Control:	
Sponsor Type:	RAPID Sponsor Code:	
Sponsor URL:	DUNS#:	

**History**

Activity	Author	Activity Date
<input type="button" value="Hand"/> Additional Information Requested	Grossman, Teresa	6/21/2013 12:56 PM PDT

I can't locate this sponsor. Please provide URL or other additional information.

- 4e. Enter comments.
- 4f. Optionally, attach documents.
- 4g. Click "OK" to submit the information and route the request back to the Sponsor Administrator.

**Submit Information**

**Comments:** 4e

Type the additional information that was requested here. (Optionally, you can attach documents to send to the Sponsor Administrator.)

**Attachments:** 4f

Document	Description
There are no items to display	

4g

- 4h. State will change back to "Sponsor Review."
- 4i. The information provided will be included in email to the Sponsor Administrator and stored in the history section of the Sponsor Workspace.

**Sponsor Review**

**My Activities**

**Test new Sponsor Request**

<b>Also Known As Name:</b>	<b>Company Profile #</b>	CP00002604
<b>Acronym:</b>	<b>Date Created:</b>	6/21/2013 12:54 PM
<b>Obsolete Sponsor:</b> no	<b>Last Modified Date:</b>	6/21/2013 1:08 PM
<b>Parent Organization:</b>	<b>Country of Ownership/Control:</b>	
<b>Sponsor Type:</b>	<b>RAPID Sponsor Code:</b>	
<b>Sponsor URL:</b>	<b>DUNS#:</b>	

**History** Project Log

Activity	Author	Activity Date
Information Submitted <span style="float: right;"><span style="background-color: black; color: white; padding: 2px 5px;">4i</span></span>	Serrano, Elma L	6/21/2013 1:08 PM PDT
Type the additional information that was requested here. (Optionally, you can attach documents to send to the Sponsor Administrator.)		
Additional Information Requested	Grossman, Teresa	6/21/2013 12:56 PM PDT
I can't locate this sponsor. Please provide URL or other additional information.		

5. You should be notified by email when the request has been approved and the new sponsor is active.

5a. State will change to "Sponsor Created."

<a href="#">My Inbox</a> <a href="#">Proposals</a> <a href="#">Awards in Preparation</a> <a href="#">Awards</a> <a href="#">Award Mods</a> <a href="#">My Sponsor Requests</a>			
My Sponsor Requests.			
Filter by ID <input type="text"/> <input type="button" value="Go"/> <input type="button" value="Clear"/> <a href="#">Advanced</a>			
ID	Name	SmartForm	State
CP00002604	Test new Sponsor Request	[Edit] <input type="checkbox"/>	Sponsor Created
CP00002595	test new sponsor pb	[Edit] <input type="checkbox"/>	Sponsor Created
CP00002594	PB Test Sponsor	[Edit] <input type="checkbox"/>	Sponsor Created
<input type="button" value="⏪"/> <input type="button" value="⏩"/> 1 to 3 of 3 <input type="button" value="⏪"/> <input type="button" value="⏩"/>			