Submitting a Research Proposal in SAGe – step-by-step instructions

Democracy, Governance and Trust (T-AP DGT)

FAPESP configured its SAGe system to help Lead PIs submit proposals to the Trans-Atlantic Platform DGT Call. Nevertheless, some of the system's functionalities could not be eliminated because of other ongoing international calls. Hence, though some of the fields ask for text in Portuguese, please only enter text in English.

For doubts, please email t-ap@fapesp.br or chamada-tap@fapesp.br with subject "DGT call"

Please notice that SAGe fully supports Internet Explorer 7 or higher, Firefox 14 or higher, Chrome 20 or higher. It also may work in other web browsers, but that may depend on how your computer is configured.

> To submit a proposal to the T-AP DGT Call, you must first create an account in the SAGe System. If you have not yet done so, please check the document **Creating a User Account in SAGe in the Call webpage**

While entering data in SAGe, please keep in mind:

(a) Click the SAVE button periodically to save your data (it is at the bottom of every menu)

(b) To navigate back within SAGe , use only the little orange arrow on the left of each menu. Please do not use the browser back button (e.g., Chrome) because it will abort your SAGe session.

PROPOSAL SUBMISSION INSTRUCTIONS

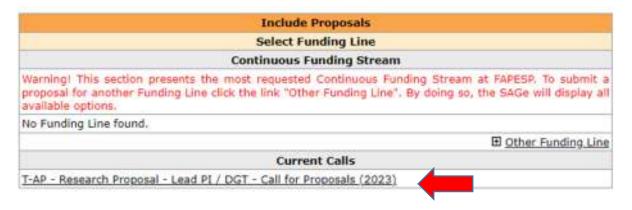1. Access https://sage.fapesp.br
2. Click on the UK flag:

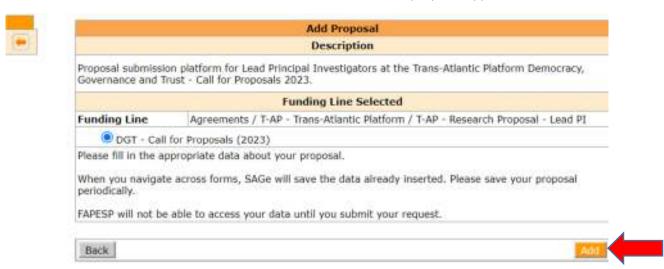3. Enter your SAGe registered ID and Password, and click OK.

4. At the Shortcuts menu, click on "New Proposal".

5. Click on "T-AP – Research Proposal – Lead PI/DGT – Call for Proposals (2023)
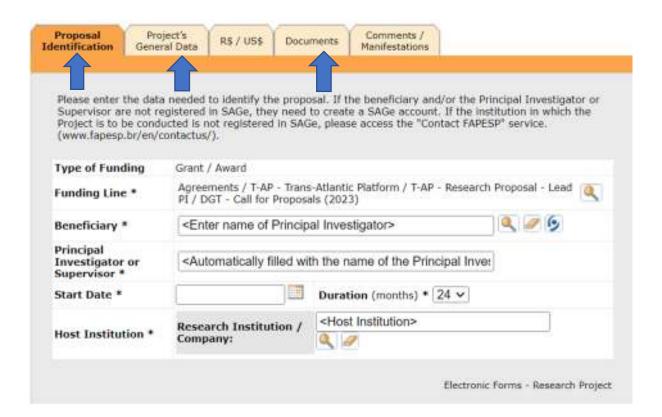

6. On the next screen, click on "Add" to start the creation of a proposal application.
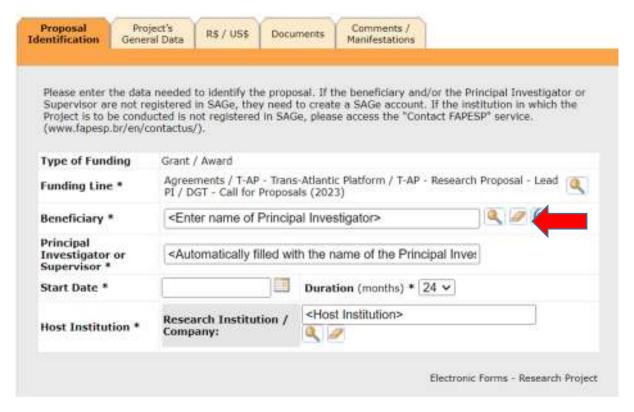
7. You will only need to provide information for the following three tabs: (a) "Proposal Identification", (b) "Project's General Data", and (c) "Documents". Please note that to illustrate our instructions, we created a proponent whose name is "Name Lead PI".

    Please do not provide any information under the R$ / US$ tab. This is reserved for other calls, and should be ignored.

8. How to fill in the **PROPOSAL IDENTIFICATION** TAB

8.1 Provide your name as registered – click on the magnifier for the "Beneficiary" field

8.2 Your name will now appear in the "Persons" tab. Please click on "Select".

8.3 The "Proposal Identification" tab will now contain your name. Please provide the additional required fields – Start Date, Duration in Months, Host Institution (again using the magnifier and searching for the Institution's name, as you did when creating an account in SAGe). The Host Institution should be the Lead PI's Institution.

Electronic Forms - Research Project

Fill in all fields marked with an *.

Back   Save

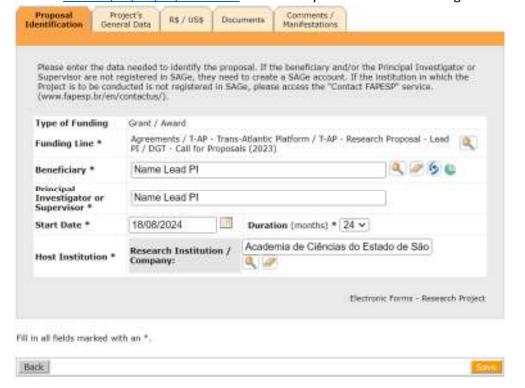8.4 – Please Click on "Save". The contents of the fields in the "Proposal Identification" tab will be saved. Please notice that if your institution is not already registered in SAGe, you will have to contact www.fapesp.br/en/contactus and ask for your institution to be registered.

Electronic Forms - Research Project

Fill in all fields marked with an *.

Back   Save
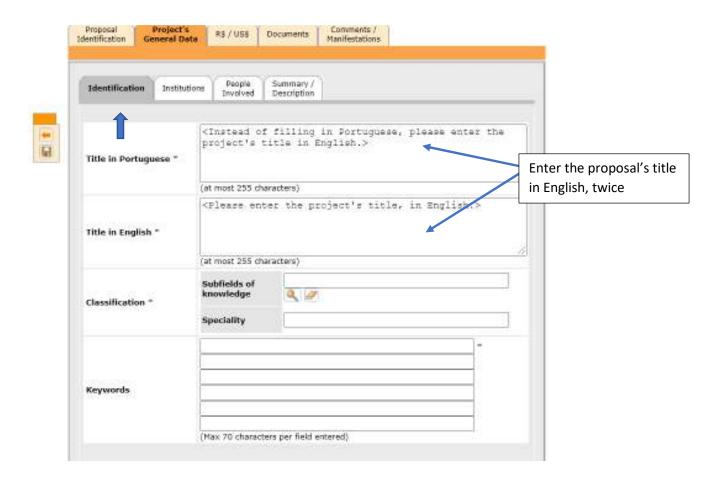
9. How to fill in the **PROJECT'S GENERAL DATA** Tab

Tab "Project's General Data" is composed of 4 subtabs – "Identification", "Institutions", "People Involved" and "Summary/description".

9.1 Select the "Identification" tab first. Fill in your project's title twice, in the fields "Title in Portuguese" and "Title in English". Please do not use the Portuguese language.

9.2. Next, provide "Subfields of knowledge", "Speciality" and "Keywords". For "Subfields of knowledge", and "Speciality", indicate the main research disciplines under which your proposal falls. You can only fill in one discipline per field.

"Subfield of knowledge" uses the official Brazilian classification of research disciplines. To provide this information, you will need to click on the magnifier and select from a menu.

9.3 Once you click on the magnifier for "Subfields of knowledge", you will be presented with a tree of fields. Choose the most appropriate one and click on "select" at the bottom of the tree. (Partial screen copy below)

9.4 Speciality and keywords are free-text fields. Please enter at least 3 keywords.

9.5 Go to the "Institutions" tab. Here, the name of the Host institution is already filled in, as provided by you in the "Proposal Identification" tab. Now, you must inform all funders involved in the proposal – for this version of the system, they are called "Partner Research Institutions". Click on "Add", and select as many funders as applicable from the pull-down menu. You cannot add multiple funders at once, you need to add one by one.

After selecting the desired funder, it will appear in the "Partner" list. You can add as many funders as applicable. Once a funder is selected, it disappears from the list. If a funder is added by mistake, click on the box at the right in the corresponding row, and choose "Delete". You must indicate at least 3 different funders. Additional funders appear on the second page of this menu, click "2"

9.6 Next, go to the "People Involved" tab. Your name is already there, as the lead PI. **Please note for that for the DGT call, you cannot add other people.** (All of the proposal's PIs are named in the pdf text of the proposal). Click on your name.

9.7 Fill in an estimate of the number of hours you will dedicate to the project and click on "Confirm".

Update team member	
Name	Name Lead PI
Role*	Principal Investigator (PI)
Hours per Week Dedicated to the Project*	
Link to Publons	
Link to MyCitations (Google Scholar)	
Link to ORCID	
Is there already a person defined to perform this task/play this role?*	◉ Yes ○ No

Fill in all fields marked with an *.

Cancel | Confirm

9.8 As the next step, please click on the "Summary/Description" tab of "Project's General Data" and provide a short version of your proposal's abstract (4,000 characters max). This abstract will be used by SAGe when generating the pdf of the entire proposal (see item 13). Though the screen requests "Abstract in Portuguese", provide an abstract in English, to be used during project evaluation to assign panelists to assess your proposal.

Modify proposal

Validate | Visualize | Submit

Proposal Identification	**Project's General Data**	R$ / US$	Documents	Comments / Manifestations

Identification	Institutions	People Involved	**Summary / Description**

Abstract in Portuguese *	This is an abridged version of my DGT proposal abstract, reduced to 4,000 characters.

Fill in all fields marked with an *.

Back | Save

Please do not enter information via the R$/US$ tab. This is strictly for other calls, and any information added here will not be taken into consideration.

10. How to fill in the **DOCUMENTS** tab

You have now finished filling in all the compulsory information in "Project's General Data". Disregard the budget information tab ("R$/US$") and go to the "Documents" tab.

Please note, you will need to upload five documents, according to the DGT call for proposals (see the Call website):
- The Research Proposal
- The Requested Budget
- The Additional Documents
- The Consent Form
- The Proof of Submission of a NOI (Notice of Intent to Apply)

The contents of the first three documents are described in the Call. The Proof of Submission of a NOI is the pdf file of the message you received when you submitted the NOI as an online form. If you do cannot find this file, please contact t-ap@fapesp.br or chamada-tap@fapesp.br For each such document, click on "Attach", and upload the corresponding file.

Download the template of the "Consent form", fill in your name and date, sign it, and upload the "Consent Form" to SAGe.

10.1 – For each file you upload, please click on "Attach", choose the file from your computer, and "Confirm". After it is successfully uploaded, the name of the file will appear in the "Documents" tab

10.2 – For each file, after clicking "Confirm", you will be asked whether you want to save the proposal. Please Click OK.

10.2.   SAGe checks all uploaded files for correct formatting, all must be in pdf. For each file you upload, please check if it has been correctly processed by downloading it using the green arrow. You may also delete and replace it with another file.

10.4 You may also upload other documents, if needed. To do this, click on "Add" under the heading "Other documents" at the bottom of the "Documents" tab.

Fill in all fields marked with an *.

11. Once you have uploaded all the required documents, please click on "Validate" at the top-level menu, and check if any information is missing (this appears in another pop-up window). If so, provide the requested information. In the example below, the error message says that you must provide the number of hours (see step 9.6) and attach four missing documents.

SUCCESSFUL VALIDATION

Success
Your proposal is valid, nothing keeps it from being submitted.

Close

12. If the validation is successful, you may click on "Visualize" to see the pdf file that SAGe generates from your proposal.

13. See below excerpts from a full proposal in pdf generated by SAGe' "Visualize" function.

Proposal Identification

Type of Funding	Grant / Award
Funding Line	Agreements / T-AP - Trans-Atlantic Platform / T-AP - Research Proposal - Lead PI / DGT - Call for Proposals (2023)
Beneficiary	Name Lead PI
Principal Investigator or Supervisor	Name Lead PI
Start Date	18/08/2024
Duration	24 month(s)
Research Institution / Company	Academia de Ciências do Estado de São Paulo/ACIESP/ACIESP

Project's General Data - Identification

Title in Portuguese	
My project title	
Title in English	
My project title	
Classification	
Grand area	Humanities
Area	Anthropology
Subarea	Anthropology of Afro-Brazilian Populations
Speciality	Another discipline
Keywords	keyword 1, Keyword 2, Keyword 3

Project's General Data - Institutions

Notice that all files that you uploaded are also available from this pdf, and "clickable" for download.

Please keep in mind that the result of "Visualization" appears in another pop-up window.

Documents

Document Type	Required Step	File Attachment	File Attachment Date	Converted File Attachment
Additional documents	Proposal Review	Additional-documents.pdf	27/06/2023	↓
Consent Form	Proposal Review	Consent-form-signed.pdf	27/06/2023	↓
Requested Budget	Proposal Review	Budget.pdf	27/06/2023	↓
Research Proposal	Proposal Review	Research-Proposal.pdf	27/06/2023	↓
Proof of NOI submission	Proposal Review	Receipt-NOI-submission.pdf	27/06/2023	

Other Documents

No file attached.

Clickable green arrows are documents that can be downloaded.

14. If you are satisfied that all is OK, click on "SUBMIT".

15. Confirm your mail and email addresses clicking on "YES"and "Confirm"

Proposal	
Your mail address is:	XXXXXXXXXXXXXXXXXXXXXXXXXXXX
Your e-mail address is:	XXXXXXXXXXXXXXXXX
Do you confirm these addresses?	○ Yes ○ No

15. Once you confirm, you will be presented with a screen concerning FAPESP's norms and reviewing procedures, that include your acknowledgement of the veracity of the information you provided. Click on "Confirm".

Submit Proposal

By clicking on the "Confirm" button I declare that: 1 - I am aware of and agree with the analysis procedure to be adopted under the terms of this submission and I authorize FAPESP to send this application to be reviewed by external experts, whose identity will be kept confidential; 2 - I have reviewed the information provided in this application and attached documents, all of which are correct and up-to-date; 3 - I am aware that requesting, obtaining, possessing and providing any documents and authorizations required to implement the proposed project, as determined by the legal authorities with jurisdiction in the places where the project will be carried out, managed or designed, is the sole responsibility of the Principal Investigator and the Co-Principal Investigators and their Institutions, and that such documents must be provided to FAPESP or the funding agency situated in the jurisdiction of the aforementioned legal authority upon request; 4 - I understand that any incorrect information provided may hinder the analysis and approval of this application.

Close   Confirm

16. Once you confirm, your proposal will be assigned a number and will become visible to the funding agencies participating in the T-AP DGT call. You will receive from SAGe a confirmation by email with relevant information on your proposal, and how to use SAGe to follow its processing.

If you do not receive this message within 1 hour of submission, please check your proposal and, if needed, contact t-ap@fapesp.br or chamada-tap@fapesp.br with subject "T-AP DGT Call"

Receipt

Your proposal was successfully received and has been assigned the process number shown below. To follow its processing within FAPESP, select the options "Processes/My processes" in the main menu. As soon as the analysis is finished, FAPESP will send an email communicating the results to the Beneficia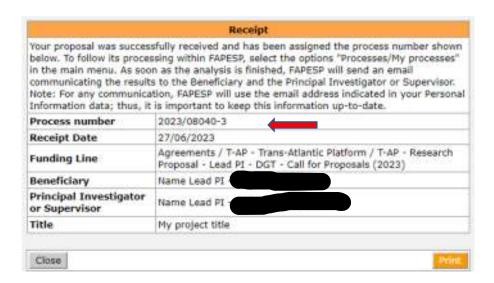ry and the Principal Investigator or Supervisor. Note: For any communication, FAPESP will use the email address indicated in your Personal Information data; thus, it is important to keep this information up-to-date.

Process number	2023/08040-3
Receipt Date	27/06/2023
Funding Line	Agreements / T-AP - Trans-Atlantic Platform / T-AP - Research Proposal - Lead PI - DGT - Call for Proposals (2023)
Beneficiary	Name Lead PI
Principal Investigator or Supervisor	Name Lead PI
Title	My project title

Close   Print

At any time, you can log in to your SAGe account and see your proposal clicking on "My Proposals" in the menu. Click on the proposal number to verify its contents, if needed. We suggest you keep a copy of this receipt by clicking on "Print". Your proposal has now become a PROCESS, with number

	New Initial Proposal	Reconsideration Request		Remove		Copy
#	**Funding Line**	**Title**	**Creation Date** ▼	**Status**	**Type**	**Process number**	**Created by**	
1.	T-AP - Research Proposal - Lead PI / DGT - Call for Proposals (2023)	My project title	27/06/2023	Submitted	New Proposal	2023/08040-3	Name Lead PI	☐

17. Until the deadline, you may also modify your proposal, by creating a copy thereof, and then modifying the copy and submitting it.

First, log in and select the proposal, and click on "Copy". A copy of that proposal will be generated, but some details may be omitted. Update the information you need, validate, and submit.

Please be aware that only ONE proposal by Lead PI can be submitted. For that reason, please delete the old proposal, to avoid having the wrong proposal evaluated.

In the screen below, the original proposal is numbered (2) (second row) and the updated proposal is in the first row. Indicate which one you want to remove, and click on Remove, to leave one single valid proposal for assessment.

To see other proposals, select "Search". To work on a proposal, start by clicking on the link of the corresponding Funding Line. To create a new proposal select "New Initial Proposal". To request reconsideration, select the proposal (with status "Rejected" or "Cancelled") and click on "reconsideration". To exclude one or more proposals, select them using the check box on the right, and click on "Remove". To copy a proposal, select it using the check box and click on "Copy".
Attention!!! The proceedings to request and use fellowship-quotas on a process are being refined. New processes must be submitted with the new format; in all other cases, the format will be updated according to solicitation and granting of changes in the quota. More information on the solicitation, granting and use of the quota are available on "Bolsa Concedida no Orçamento do Auxílio (BCO)", that can be accessed clicking the "Manuais" link, at the top of the page, using the Portuguese version. IMPORTANT! The rules to use the quotas were not changed, only the way they are handled by the system.

New Initial Proposal		Reconsideration Request		Remove		Copy	

#	Funding Line	Title	Creation Date	Status	Type	Process number	Created by	
1.	T-AP - Research Proposal - Lead PI / DGT - Call for Proposals (2023)	My project title	27/06/2023	Submitted	New Proposal	2023/08041-0	Name Lead PI	☐
2.	T-AP - Research Proposal - Lead PI / DGT - Call for Proposals (2023)	My project title	27/06/2023	Submitted	New Proposal	2023/08040-3	Name Lead PI	☑