

Create an ESPR Request

Overview

To create a request in the Electronic Sponsored Projects Request (ESPR) system, follow the following steps.

1. To initiate any type of new request in ESPR, click **Create Request** on the top menu bar.



Office for Sponsored Research
[OSR Home](#)
 Evanston Office: 847-491-3003 OSR-Evanston@northwestern.edu
 Chicago Office: 312-503-7955 OSR-Chicago@northwestern.edu

2. **Select the request type** from the dropdown menu to begin your request.

3. **Select a request sub-type** (if applicable). The selection of some types of requests (e.g. Budget) will cause the appearance of a subtype dropdown menu from which you can select additional options.

Create Request

Request Type: Budget

If you need to request a new agreement (i.e. DUA, MTA, NDA, or subcontract) but are unsure as to the correct type to request, please reference: <http://osr.northwestern.edu/agreements/types>

Request Sub Type: Please Select Value

InfoEd Proposal #

Proposal Title:

800 characters remaining out of the max limit of 800 characters.
For a DUA, MTA, or NDA without a proposal title, enter "N/A".

Principal Investigator: NetID: Name:

Department/Center: Please Select Value

Originating Sponsor:

Sponsor:

Sponsor Award #:

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4. **For requests related to an existing project in InfoEd**, enter the InfoEd Proposal Number (i.e. the SP#); then click the "Get InfoEd Details" button to auto-fill data (e.g. title, PI) associated with that Proposal #. (Note: The department or center can be manually selected from the dropdown if the auto-filled department is incorrect.)

Create Request

Request Type: Budget

If you need to request a new agreement (i.e. DUA, MTA, NDA, or subcontract) but are unsure as to the correct type to request, please reference: <http://osr.northwestern.edu/agreements/types>

Request Sub Type: Carry-Forward of Unobligated Balance

InfoEd Proposal # SP54321MM

Get InfoEd Details

For Data Use Agreements (DUA), Material Transfer Agreements (MTA), Non-Disclosure Agreements (NDA), and/or if no Proposal # exists, enter "N/A".

Proposal Title: Cookie Experiments

800 characters remaining out of the max limit of 800 characters.
For a DUA, MTA, or NDA without a proposal title, enter "N/A".

Principal Investigator: NetID: JOB124 Name: Joy Baker

Department/Center: MCC Engg Science

Originating Sponsor: Great American Bake-off Institute

Sponsor: Great American Bake-off Institute

Sponsor Award #: GABI1234

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For DUA's, MTA's, and NDA's for which no Proposal Number exists, enter N/A in the InfoEd Proposal # field. Fill in the remaining fields as appropriate.

For both cases, click **Create Request** to initiate the request.

5. **Fill out the required fields/questions on the request entry screen.** Upon clicking 'Create Request', the entry screen for the selected request type will appear. Each type or sub-type of request requires different information be provided. Responses to certain questions will also prompt other related questions/fields to appear. Beyond the required information for any given request, additional information for OSR can always be entered and/or uploaded. If you are uncertain as to how to appropriately respond to a question, [contact your GO or Contracts Officer](#) for assistance.

Request: Budget Modification: Carry Forward of Unobligated Balance	
Tracking #	384
Institution #	SP54321MM
Principal investigator:	Joy Baker
Proposal title:	Cookie Experiments
Originating sponsor:	Great American Bake-off Institute
Sponsor:	Great American Bake-off Institute
Sponsor Award #:	GABI1234
Award Department:	MCC Engg Science
Request type:	Budget: Carry-Forward of Unobligated Balance
Request created by:	OSR Info
Amount to carry forward	<input type="text"/>
How will the carry-forward be used?	<input type="text"/> 1000 characters remaining out of the max limit of 1000 characters.
If sponsor prior approval is required, has the approval been obtained?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Has your Financial Status Report (FSR) been submitted? If no, provide additional information and/or upload correspondence with ASRSP in "Other Information" section (below)	<input type="radio"/> Yes <input type="radio"/> No

6. **Save or Submit the Request:** Once information is entered on the request entry screen, there are three options:
- Save Details** will save the information you entered, including uploaded documents. You can access the in-progress requests from the **My Requests** menu at a later time in order to edit or route it. Save Details does NOT route a request for approval.
 - Save & Submit for Routing** will route a completed request to the PI and approvers for review and approval.
 - Cancel & Back to Menu** will return you to the main menu without saving any new information entered or documents uploaded on the request entry screen.

Other Information & Uploads	
Upload current GM045 (optional):	<input type="button" value="Upload Current GM045"/>
Additional info for OSR (optional):	<input type="text"/> 1000 characters remaining out of the max limit of 1000 characters.
Upload additional info for OSR (optional):	<input type="button" value="Upload additional info for OSR"/>

Request Creation Errors: Required Information and Uploads

Required Information Error

If you have not provided all required information/uploads, when you click Save & Submit for Routing, a red error message will appear at the top of the screen indicating which fields still must be completed, and the system will prevent the request from being routed. You may save incomplete requests (by clicking “Save Details”) for later completion.

Request: Budget Modification: Carry Forward of Unobligated Balance	
The value in field 'If sponsor prior approval is required, has the approval been obtained?' is required.	
The value in field 'Has your Financial Status Report (FSR) been submitted?' is required.	
The value in field 'Amount to carry forward' is required.	
The value in field 'How will the carry-forward be used?' is required.	
Tracking #	384
Institution #	SP54321MM
Principal investigator:	Joy Baker
Proposal title:	Cookie Experiments

Document Uploads

ESPR allows for the upload of various file types, including PDFs, Word documents, or Excel spreadsheets.

ESPR document upload limits are as follows:

- Single file limit: 20MB
- Single field limit: 30 documents

Exceeding either of these limits will produce an error.

Document Naming Conventions and Special Characters

Certain characters (for example, @ and +) used in the name of a document that you are attempting to upload to a request will also result in an error. In these instances it may appear as if you successfully uploaded the document to a request; however, if someone clicks on the document to try to view it, a “file not found” or “invalid URL” error will appear. Therefore, as a general practice, **do NOT include any special characters in the file names of documents to be uploaded to an ESPR request.**

