

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

Transatlantic Platform Recovery, Renewal and Resilience in a Post-Pandemic World (RRR)

ONLY LEAD PIs NEED TO SUBMIT VIA SAGE

FAPESP configured its SAGe system to help Lead PIs submit proposals to the Transatlantic Platform RRR 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.

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 RRR 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**.

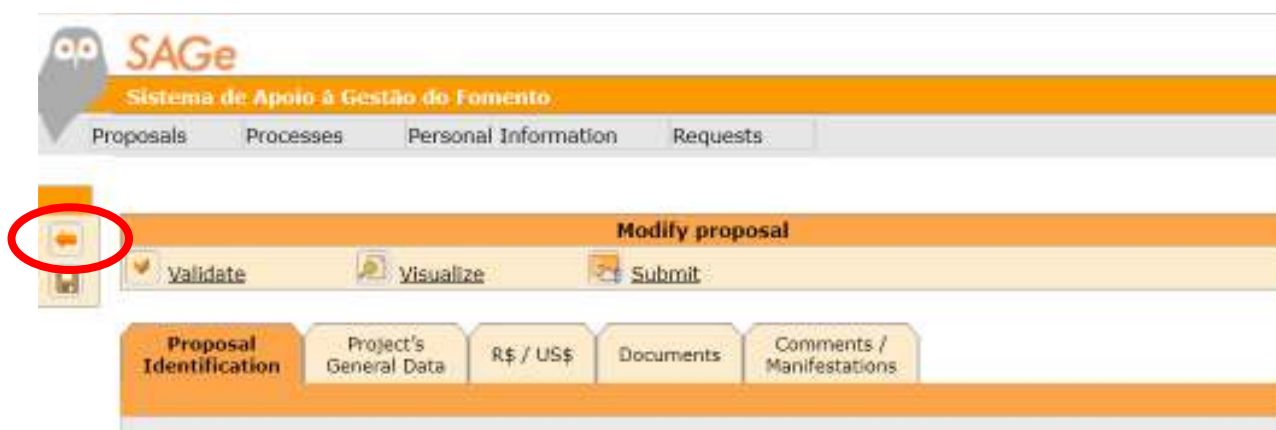
While entering data in SAGe, please keep in mind:

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

Fill in all fields marked with an *.



- (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”.

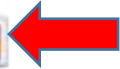
The screenshot shows the SAGe system interface. At the top, there is a header with the SAGe logo and the text "Sistema de Apoio à Gestão do Fomento". Below the header, there is a navigation bar with tabs for "Proposals", "Processes", "Personal Information", and "Requests". The "Proposals" tab is active, showing a "New Proposal" section with a table of proposals. A "Shortcuts" menu is visible, listing "Investigator's Tasks", "Processes pending my review", "My Proposals", and "New Proposal". A red arrow points to the "New Proposal" link in the shortcuts menu. There are also two warning boxes: one about enabling pop-ups and another about updating mailing addresses.

5. Click on “T-AP Research Proposal – Lead PI/ RRR Call for Proposals (2021)”

The screenshot shows the SAGe system interface. At the top, there is a header with the SAGe logo and the text "Sistema de Apoio à Gestão do Fomento". Below the header, there is a navigation bar with tabs for "Proposals", "Processes", "Personal Information", and "Requests". The "Proposals" tab is active, showing a "Select Funding Line" section. The "Continuous Funding Stream" section is expanded, showing a warning message and a "No Funding Line found" message. A red arrow points to the "T-AP - Research Proposal - Lead PI / RRR - Call for Proposals (2021)" link in the "Current Calls" section.

6. On the next screen, click on “Add” to start the creation of a proposal application.

Add Proposal	
Description	
Proposal submission platform for Lead Principal Investigators at the Trans-Atlantic Platform Recovery, Renewal and Resilience in a Post-Pandemic World (RRR) Call for Proposals.	
Funding Line Selected	
Funding Line	Agreements / T-AP - Trans-Atlantic Platform / T-AP - Research Proposal - Lead PI
<input checked="" type="radio"/> RRR - Call for Proposals (2021)	
Please fill in the appropriate data about your proposal.	
When you navigate across forms, SAGe will save the data already inserted. Please save your proposal periodically.	
FAPESP will not be able to access your data until you submit your request.	
<input type="button" value="Back"/>	<input type="button" value="Add"/>



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".

Proposal Identification	Project's General Data	R\$ / US\$	Documents	Comments / Manifestations
Please enter the data needed to identify the proposal. If the beneficiary and/or the Principal Investigator or Supervisor are not registered in SAGe, they need to create a SAGe account. If the institution in which the Project is to be conducted is not registered in SAGe, please access the "Contact FAPESP" service. (www.fapesp.br/en/contactus/).				
Type of Funding	Regular Research			
Funding Line *	Agreements / T-AP - Trans-Atlantic Platform / T-AP - Research Proposal - Lead PI / RRR - Call for Proposals (2021)			
Beneficiary *	<input type="text" value="<Enter name of Principal Investigator>"/>			
Principal Investigator or Supervisor *	<input type="text" value="<Automatically filled with the name of the Principal Inves"/>			
Start Date *	<input type="text"/>	Duration (months) *	24 v	
Host Institution *	Research Institution / Company:	<input type="text" value="<Host Institution>"/>		
Electronic Forms - Research Project				










Fill in all fields marked with an *.

<input type="button" value="Back"/>	<input type="button" value="Save"/>
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8. How to fill in the **PROPOSAL IDENTIFICATION TAB**

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

Please enter the data needed to identify the proposal. If the beneficiary and/or the Principal Investigator or Supervisor are not registered in SAGE, they need to create a SAGE account. If the institution in which the Project is to be conducted is not registered in SAGE, please access the "Contact FAPESP" service. (www.fapesp.br/en/contactus/).

Type of Funding	Regular Research
Funding Line *	Agreements / T-AP - Trans-Atlantic Platform / T-AP - Research Proposal - Lead PI / RRR - Call for Proposals (2021)
Beneficiary *	<Enter name of Principal Investigator>    
Principal Investigator or Supervisor *	<Automatically filled with the name of the Principal Inve>
Start Date *	<input type="text"/>  Duration (months) * 24 <input type="text"/>
Host Institution *	Research Institution / Company: <input type="text"/>  

Electronic Forms - Research Project

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

Persons		
Name	CPF	Country
<input checked="" type="radio"/> Name Lead PI		Antarctica

8.3 The “Proposal Identification” tab will now contain your name. Please provide the additional required fields – Start Date, Duration in Months, Research Institution (again using the magnifier and searching for the Institution’s name, as you did when creating an account in SAGE).

[Proposal Identification](#) | [Project's General Data](#) | [R\\$ / US\\$](#) | [Documents](#) | [Comments / Manifestations](#)

Please enter the data needed to identify the proposal. If the beneficiary and/or the Principal Investigator or Supervisor are not registered in SAGE, they need to create a SAGE account. If the institution in which the Project is to be conducted is not registered in SAGE, please access the "Contact FAPESP" service. (www.fapesp.br/en/contactus/).

Type of Funding	Regular Research	
Funding Line *	Agreements / T-AP - Trans-Atlantic Platform / T-AP - Research Proposal - Lead PI / RRR - Call for Proposals (2021)	
Beneficiary *	<input type="text" value="<Enter name of Principal Investigator>"/>	
Principal Investigator or Supervisor *	<input type="text" value="<Automatically filled with the name of the Principal Inves:"/>	
Start Date *	<input type="text" value=""/>	Duration (months) * 24
Host Institution *	Research Institution / Company:	<input type="text" value="<Host 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.

[Proposal Identification](#) | [Project's General Data](#) | [R\\$ / US\\$](#) | [Documents](#) | [Comments / Manifestations](#)

Please enter the data needed to identify the proposal. If the beneficiary and/or the Principal Investigator or Supervisor are not registered in SAGE, they need to create a SAGE account. If the institution in which the Project is to be conducted is not registered in SAGE, please access the "Contact FAPESP" service. (www.fapesp.br/en/contactus/).

Type of Funding	Regular Research	
Funding Line *	Agreements / T-AP - Trans-Atlantic Platform / T-AP - Regular Research Grant / Call for Proposals (2021)	
Beneficiary *	<input type="text" value="Name Lead PI"/>	
Principal Investigator or Supervisor *	<input type="text" value="Name Lead PI"/>	
Start Date *	<input type="text" value="18/08/2022"/>	Duration (months) * 24
Host Institution *	Research Institution / Company:	<input type="text" value="<Host Institution>"/>

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". There is no need to fill in the **"Institutions" subtab**.

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.

The screenshot shows the 'Project's General Data' tab with the 'Identification' subtab selected. The form contains the following fields:

- Title in Portuguese ***: A text input field with a placeholder: "<Instead of filling in Portuguese, please enter the project's title in English.>". A blue arrow points to this field.
- Title in English ***: A text input field with a placeholder: "<Please enter the project's title, in English.>". A blue arrow points to this field.
- Classification ***: A section containing two subfields:
 - Subfields of knowledge**: A text input field with a magnifying glass icon.
 - Speciality**: A text input field.
- Keywords**: A multi-line text input field with a placeholder: "(Max 70 characters per field entered)".

A callout box on the right side of the form contains the text: "Enter the proposal's title in English, twice". Two blue arrows point from this box to the 'Title in English' and 'Title in Portuguese' fields.

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.

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

Identification Institutions People Involved Summary / Description

Title in Portuguese *
My project title
(at most 255 characters)

Title in English *
My project title
(at most 255 characters)

Classification *
Subfields of knowledge
Speciality

Keywords
(Max 70 characters per field entered)

9.3 Once you click on the magnifier for “Subfield 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)

SAGe - Google Chrome

Not secure | intranet.venon-us9.fapesp.br/SAGe_WEB/knowledgeSubAr...

Select Fields / Subfield of knowledge

- Display the whole Tree
- Agricultural Sciences
- Biological Sciences
- Health Sciences
- Mathematical and Physical Sciences
- Humanities
 - Anthropology
 - Anthropology of Afro-Brazilian Populations
 - Rural Anthropology
 - Urban Anthropology

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

The screenshot shows a web-based form for proposal identification. At the top, there are tabs for 'Proposal Identification', 'Project's General Data', 'RS / US\$', 'Documents', and 'Comments / Manifestations'. Below these, there are sub-tabs for 'Identification', 'Institutions', 'People Involved', and 'Summary / Description'. The 'Identification' sub-tab is active. The form contains the following sections:

- Title in Portuguese ***: A text area containing 'My Project title' with a note '(at most 255 characters)'.
- Title in English ***: A text area containing 'My project title' with a note '(at most 255 characters)'.
- Classification ***:
 - Subfields of knowledge**: A dropdown menu showing 'Anthropology of Afro-Brazilian Populations' with two small icons below it.
 - Speciality**: A text input field containing 'Another discipline'.
- Keywords**: Three stacked text input fields, each containing 'Keyword1', 'Keyword2', and 'Keyword3' respectively. A note '(Max 70 characters per field entered)' is at the bottom.

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

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

Identification Institutions **People Involved** Summary / Description

Team

To include a new team member, click on "Add". To change information about a team member, click on that person's name. To eliminate a person from the team, use the check box associated with the person's name and click on "Delete". If you want to include a team member who is not yet registered in SAGE, this person must first request his/her registration in SAGE.

Add Delete

Name	Role	Hours per Week Dedicated to the Project	Duration	Primary Occupation
Name Lead PI	Principal Investigator (PI)	0	18/08/2022 to 17/09/2024	

* With Research Overhead - Fringe Benefits

Fill in all fields marked with an *.

9.6 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*	<input type="text"/>
Link to Publons	<input type="text"/>
Link to MyCitations (Google Scholar)	<input type="text"/>
Link to ORCID	<input type="text"/>
Is there already a person defined to perform this task/play this role?*	<input checked="" type="radio"/> Yes <input type="radio"/> No

Fill in all fields marked with an *.

9.7 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).

The screenshot shows a web interface for modifying a proposal. At the top, there is a navigation bar with 'Validate', 'Visualize', and 'Submit' buttons. Below this is a main menu with tabs for 'Proposal Identification', 'Project's General Data', 'R\$ / US\$', 'Documents', and 'Comments / Manifestations'. The 'Project's General Data' tab is selected, and within it, the 'Summary / Description' sub-tab is active. A text input field is present with the text: 'Here is the abstract of my proposal to the RRR Call, abridged to 4,000 characters.' To the left of this field is a label 'Abstract in Portuguese' with an asterisk. A blue arrow points to the 'Summary / Description' tab.

Fill in all fields marked with an *.

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 four documents, according to the RRR call for proposals (see T-AP website):

- The Research Proposal
- The Requested Budget
- The Additional Documents
- The Consent Form

The contents of the first three documents are described in the Call. 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 filled “Consent Form” to SAGE – please keep in mind that only PDF files are accepted.

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

←
📄

Please include here all the documentation needed to submit your proposal.

Documents

Select the appropriate document. The option "Download Template" will provide you with a model for the corresponding document. Choose "Attach" to attach a file, and "Remove" to eliminate a document from the process. The documents you are attaching can only be visualized after they are converted to PDF, by clicking on the icon of the converted file. Select option "Not applicable" to indicate that you will not attach a document. This option is only available for documents that are marked as non-compulsory, and whose status is "Proposal Review".

Document Type	Required Step	File Attachment	File Attachment Date	Converted File Attachment	Operation
Additional documents * As required by national addenda, grouped by funder. [PDF up to 5 MB]	Proposal Review				Attach 📄
Consent Form * To be signed by the Lead PI. [PDF up to 5 MB]	Proposal Review				Attach 📄 Download Template ↓
Requested Budget * See call text for contents [PDF up to 5 MB]	Proposal Review				Attach 📄
Research Proposal * See call text for contents. [PDF up to 5 MB]	Proposal Review				Attach 📄

Other Documents

If you need to attach additional documents to your proposal, click on "Add". To remove a document, click on "Delete". Any document attached can only be visualized after it has been converted to PDF. For visualization, click on the corresponding icon.

[Add](#) + [Delete](#) 🗑️

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

Warning
After the upload, read the document to make sure that it has been attached correctly. The Investigator must ensure the integrity of the attached documents.

Add Document

Document's Name Choose File No file chosen

Attention!
If your file name contains invalid characters, they will be replaced by the underscore (_) character.

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

Your proposal will be saved. Do you want to continue?

10.3 SAGe checks all uploaded files for correct formatting, only accepting PDF documents. For each file you upload, please check if it has been correctly processed by downloading it using the green arrow under column “Converted file attachment”. You may also delete and replace it with another file.

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

Please include here all the documentation needed to submit your proposal.

Documents

Select the appropriate document. The option "Download Template" will provide you with a model for the corresponding document. Choose "Attach" to attach a file, and "Remove" to eliminate a document from the process. The documents you are attaching can only be visualized after they are converted to PDF, by clicking on the icon of the converted file. Select option "Not applicable" to indicate that you will not attach a document. This option is only available for documents that are marked as non-compulsory, and whose status is "Proposal Review".

Document Type	Required Step	File Attachment	File Attachment Date	Converted File Attachment	Operation
Additional documents * As required by national addenda, grouped by funder. [PDF up to 5 MB]	Proposal Review				Attach
Consent Form * To be signed by the Lead PI. [PDF up to 5 MB]	Proposal Review				Attach Download Template
Requested Budget * See call text for contents [PDF up to 5 MB]	Proposal Review				Attach
Research Proposal * See call text for contents. [PDF up to 5 MB]	Proposal Review	MyResearchProposalforTAP.pdf	09/04/2021		Delete

Other Documents

If you need to attach additional documents to your proposal, click on "Add". Any document attached can only be visualized after it has been converted to PDF. For visualization, click on the corresponding icon.

To check if file was correctly processed

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.

Other Documents

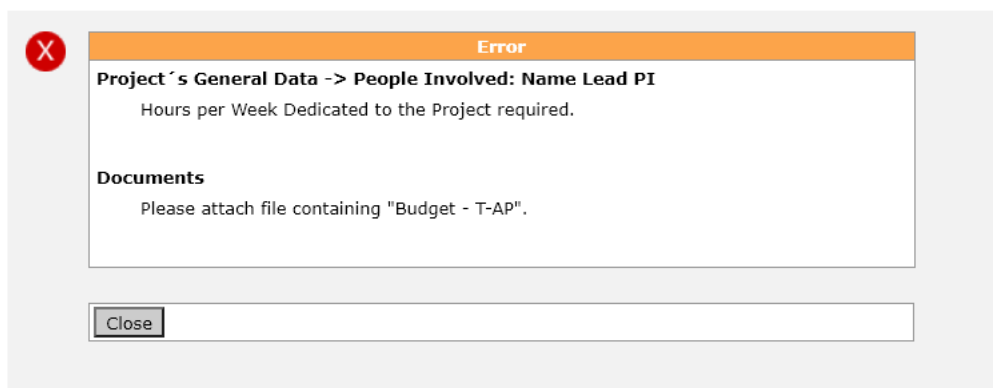
If you need to attach additional documents to your proposal, click on "Add". To remove a document, click on "Delete". Any document attached can only be visualized after it has been converted to PDF. For visualization, click on the corresponding icon.

[Add](#) [Delete](#)

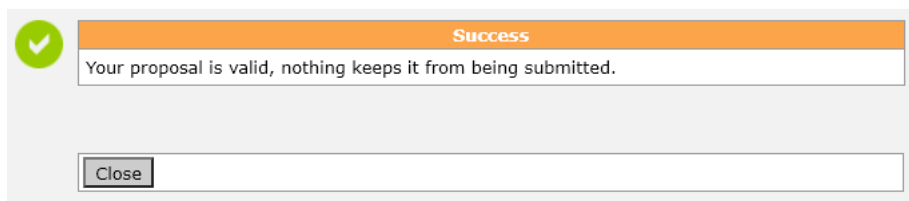
No file attached.

Fill in all fields marked with an *.

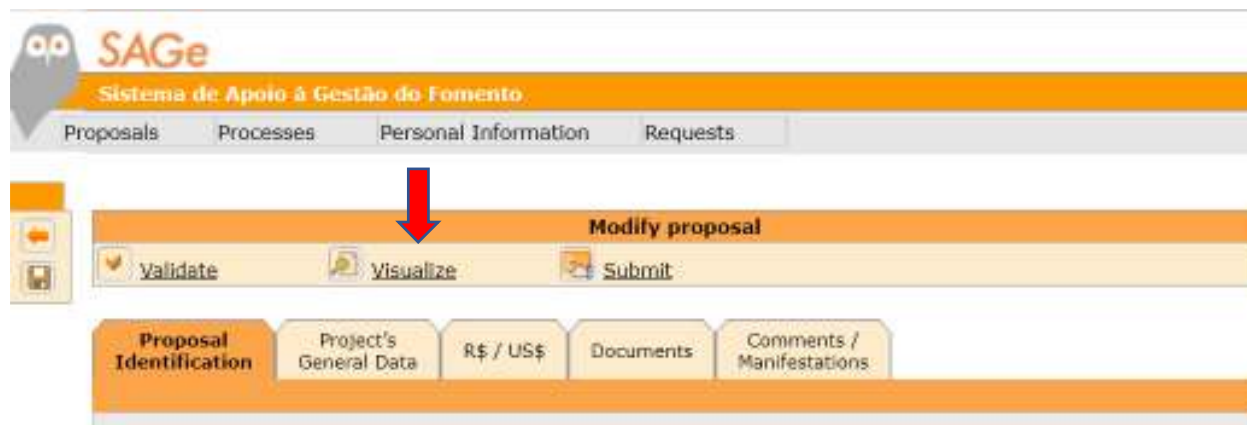
- 11 Once you have uploaded all the required documents, please click on “Validate” at the top-level menu, and check if any information is missing. If so, provide the requested information. In the example below, the error message says that you must provide the number of hours (see step 9.6) and attach a missing document.



SUCCESSFUL VALIDATION



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	Regular Research
Funding Line	Agreements / T-AP - Trans-Atlantic Platform / T-AP - Regular Research Grant / Call for Proposals (2021)
Beneficiary	Name Lead PI
Principal Investigator or Supervisor	Name Lead PI
Start Date	18/08/2022
Duration	24 month(s)
Research Institution / Company	Instituto de Computação/IC/UNICAMP

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	Keyword1, Keyword2, Keyword3

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

Documents

Documents				
Document Type	Required Step	File Attachment	File Attachment Date	Converted File Attachment
Additional documents	Proposal Review	DocumentsrequiredbyAddenda.pdf	09/04/2021	
Consent Form	Proposal Review	ConsentFormSigned.pdf	09/04/2021	
Requested Budget	Proposal Review	TAP-ConsolidatedBudgets.pdf	09/04/2021	
Research Proposal	Proposal Review	MyResearchProposalforTAP.pdf	09/04/2021	
Other Documents				
No file attached.				

Clickable green arrows are documents that can be downloaded.

Comments / Manifestations

Comments

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:	XX
Your e-mail address is:	XXXXXXXXXXXXXXXXXXXX
Do you confirm these addresses?	<input type="radio"/> Yes <input type="radio"/> 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 Investigators and their host 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 in this application 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 RRR 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.

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 Beneficiary 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	2021/00003-6
Receipt Date	28/03/2021
Funding Line	Agreements / T-AP - Trans-Atlantic Platform / T-AP - Regular Research Grant - Call for Proposals (2021)
Beneficiary	Name Lead PI - XXXXXXXXXXXX
Principal Investigator or Supervisor	Name Lead PI - XXXXXXXXXXXX
Title	My project title

Close
Print