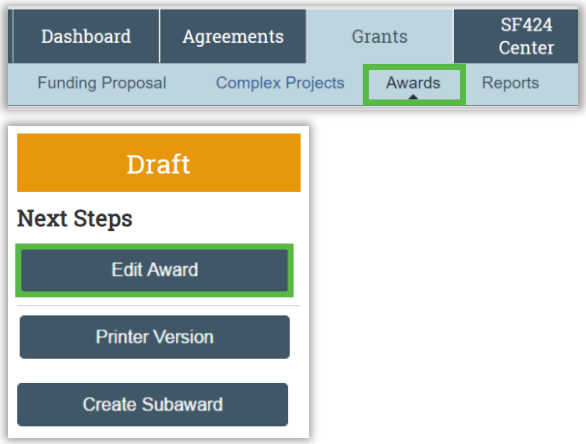
Create and Manage Deliverables

Deliverables created in the system as part of SR's award set-up or using the Manage Deliverables activity provide a way to track sponsor and Northwestern requirements for the award, such as deadlines, special reports, and progress reports. This job aid shows how to create and follow up on deliverables.

1. Create Deliverables During Award Set-up

When the award is in a Draft state, open the award from your CERES inbox or the Grants Awards page.

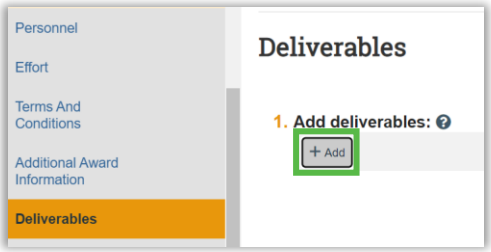
On the award workspace, click **Edit Award** to open the award SmartForm.



2. Create Deliverables

From the award SmartForm, navigate to the *Deliverables* page and then click **Add**.

The *Add Deliverable* form appears.



3. Add Deliverable Information

Complete the *Add Deliverable* form.

For question 1, create a name without period-specific descriptions, for example, "Progress Report." If you select multiple occurrences of the deliverable, the system automatically adds a suffix to the name indicating its place in the series.

For question 3, set the number of occurrences.

For question 4, select the frequency the deliverable must be produced.

Note: If you select Final or On Demand, the system creates only one occurrence even if you specified more than one occurrence above.

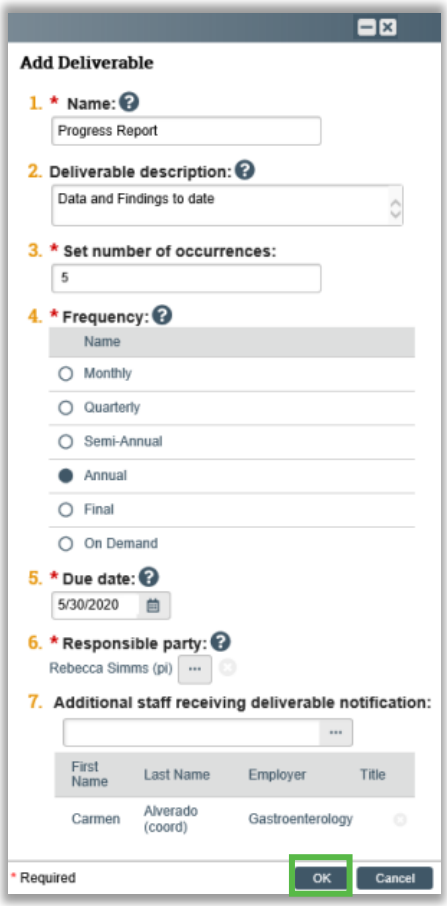
For question 5, if there will be multiple occurrences of the deliverable, specify the date the first occurrence is due. The system calculates the due dates for the other occurrences based on this date and the frequency.

For question 6, the Responsible Party can be reassigned if needed by clicking the ellipsis.

Once you have completed the form, click **OK**.

You can click a deliverable name to re-open it for further editing or click the **X** button to remove it.

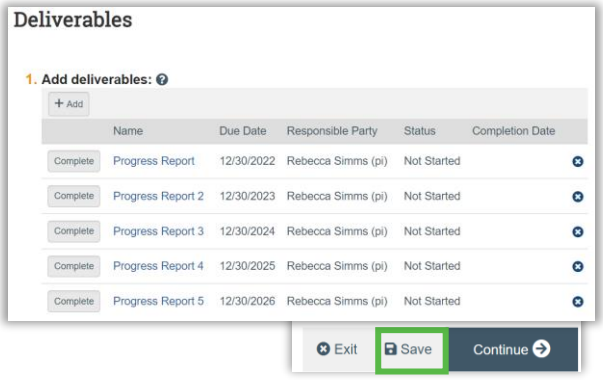
Review the *CERES Sponsored Research Grants Reference Guide* for more detailed information.



4. Save Deliverables

When finished adding deliverables, click **Save** or **Continue**.

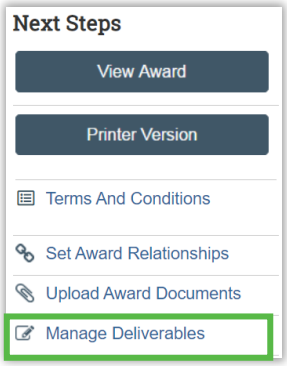
Note: The deliverables entered in the SmartForm appear on the **Deliverables** tab in the award workspace.



5. Manage Deliverables

The assigned specialist and department personnel with edit rights on the award can add and modify deliverables using the **Manage Deliverables** activity in the award workspace.

Note: CERES will send reminder emails to responsible parties 90, 60, and 30 days prior to the deliverable due date if the deliverable is outstanding.



6. Complete a Deliverable

When a deliverable is complete, the assigned specialist, the administrative contact, or anyone designated as an editor on the deliverable's parent award can mark it as complete.

From the parent award workspace, click the **Deliverables** tab.

On the Deliverables tab, click **Complete** for the deliverable. The *Edit Deliverable* form will open.

Drag the deliverable documents into the **Attach completed document(s)** field (or click **Add** and choose the file from your local drive).

Fill out the rest of the form and click **OK**.

On the Deliverables tab, the deliverable now shows as Completed.