

Linking Collaboration to Research Data

Overview

The University of Alberta is increasingly driven by interdisciplinary research teams. However, our legacy systems primarily track the Nominated Principal Applicant (NPA), leaving the vital contributions of co-investigators invisible in institutional data.

To address this, we are evolving our systems to align with Budget Model 2.0. These changes, planned to go live in Peoplesoft on **March 23 (2026)**, will:

- **Accurately Track Collaborations:** Integrate team data with institutional research metrics.
- **Fair Revenue Allocation:** Ensure research revenue is shared across all participating Faculties based on actual contribution.
- **Modernize PeopleSoft:** Replace the generic "Co-PI" label with specific roles that reflect the nature of each researcher's work that can be aligned with roles specified by major sponsors.

The Shift: From Lead-Only to Team-Based Credit

Currently, the research metrics used to drive faculty budget allocations are linked only to the nominated principal applicant. To recognize that collaboration drives high-impact research, we are introducing a "Researcher Contribution" function in PeopleSoft.

During the proposal phase, teams will now select roles that correlate to the extent of their contribution. This ensures that when researchers from different Faculties collaborate, the resulting revenue and data metrics are shared proportionately among all contributing units.

***Implementation Timeline:** Immediate use focuses on enhanced reporting. Full integration into the Budget 2.0 allocation process is targeted for Fiscal 2028.

Investigator Roles & Guidelines

Researchers must now select the most accurate role for collaborators from the following categories:

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Standard Roles (For Non-Tri-Agency Sponsors)

Use these roles for any sponsor other than NSERC, CIHR, SSHRC, or TIPS-NFRF.

Role	Responsibility Level	Impact on Proposal
Nominated Principal Applicant (NPA)	Lead: Responsible for design, administration, and the majority of the work.	Primary lead and account holder.
Co-Principal Applicant (CPA)	Co-Lead: Near-equal responsibility for design and execution.	Essential: Project would be significantly altered without them.
Co-Applicant (CA)	Essential Collaborator: Leads specific aspects (e.g., analysis, equipment).	Significant: Removal requires major adjustments to the proposal.
Collaborator (C)	Contributor: Provides specific expertise, materials, or personnel.	Supporting: Strengthens the project but is not essential to core work.

Sponsor-Specific Roles (Tri-Agency)

When applying for Tri-Agency funding, roles in PeopleSoft must mirror the sponsor's definitions to ensure seamless alignment.

- **NSERC:**
 - * **Applicant:** The lead coordinator for financial and administrative aspects.
 - **Co-applicant:** May lead some of the research; member of the core applying group.

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- **Collaborator:** Expected to contribute to the intellectual direction or training.
- **CIHR:**
 - * **Nominated Principal Applicant:** The administrative and intellectual lead.
 - **Principal Applicant:** Responsible for leading intellectual direction (often multiple).
 - **Co-Applicant:** Actively participates but does not direct the overall project.
 - **Knowledge User:** Specifically for those using research to inform health policy or practice.
- **SSHRC:**
 - * **Applicant/Project Director:** Primary responsibility for intellectual and financial direction.
 - **Co-Director:** Shares intellectual leadership and planning with the Director.
 - **Co-Applicant/Co-Investigator:** Makes significant intellectual or financial contributions.
- **TIPS-NFRF:**
 - **Nominated Principal Investigator (NPI):** Administrative lead; must be an independent researcher.
 - **Co-Applicant:** Contributes to execution; may include practitioners or educators.
 - **Collaborator:** Contributes to execution but **cannot** be supported by grant funds.

Questions? Please contact your **Research Administration Specialists** by email at rsoinfo@ualberta.ca

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The following screenshots demonstrate the changes made on the Request for New Research Project page that will gather the new information for the research team members. For more information on how to request a new research project, [please refer to our website](#).

Scenario A: Tri-Agency Sponsors

1. **Select Sponsor:** Choose CIHR, NSERC, SSHRC, or TIPS-NFRF.

External

External	
<input type="text"/>	<input type="text"/>
1	<input type="text"/>

Internal Sponsor

2. **Assign Roles:** The dropdown menu will automatically update to show only the roles specific to that sponsor (as defined above).

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External


	*Sponsor	Other Sponsor
1	<input type="text" value="Other"/>	<input type="text" value="Alberta Innovates"/>


3. Add Team: Use the "UofA Co-Investigator(s)" section to add members and assign their **Standard Roles**.

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UofA Co-Investigator(s)



Co-Investigator(s)
Acknowledgement Details






	Resource	Employee ID	Name
1	Nominated Principal Applicant	0192195	Riqoxuip, Huhmioq
2	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin-bottom: 5px;"> ✓ Co-Applicant Co-Principal Applicant Collaborator </div>	<input style="width: 80%; border: 1px solid #ccc;" type="text"/> 	


Attachment: application/proposal as one PDF file.

4. You may add as many team members as necessary by clicking the “+” button.

UofA Co-Investigator(s)



1-1 of 1


View

Co-Investigator(s)


	Resource	Employee ID	Name	Department	Description	Faculty	Description	
1	Nominated Principal Applicant	0192195	Riqoxuip, Huhmioq	610100	VPR Research	610000	VPR VP Research	+

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Scenario B: Non-Tri-Agency Sponsors

1. **Select Sponsor:** Choose "Other" for any non-Tri-Agency sponsor.


External

	*Sponsor	Program
1	NSERC <input type="text"/>	<input type="text"/>

2. **Assign Roles:** The dropdown menu will automatically update to show only the roles specific to that sponsor (as defined above).

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CIHR

Co-Investigator(s) Acknowledgement Details 

	Resource	Employee ID	Name
1	Nominated Principal Applicant	0192195	Riqoxuip,Huhmioq
2	<input type="text"/>	<input type="text"/>	

Attac application/proposal as one PDF file.

Attac

- Co-Applicant
- Knowledge User
- Principal Applicant
- Principal Knowledge User

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NSERC

UofA Co-Investigator(s)

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Co-Investigator(s) Acknowledgement Details ▶▶

	Resource	Employee ID	Name
1	Applicant	0192195	Riqoxuip,Huhmioq
2	<input checked="" type="checkbox"/> Co-Applicant <input type="checkbox"/> Collaborator	<input type="text"/>	

Att and final application/proposal as one PDF file.

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SSHRC

Co-Investigator(s)		Acknowledgement Details	
Resource	Employee ID	Name	
1	Applicant/Project Director	0192195	Riqoxuip, Huhmiox
2	<input type="text"/>	<input type="text"/>	

Attachment: application/proposal as one PDF file.

Attachment:

- Co-Applicant/Co-Investigator
- Co-Director
- Collaborator

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TIPS - NFRF

Co-Investigator(s)		Acknowledgement Details		▶
	Resource	Employee ID	Name	
1	Nominated Principal Investigat	0192195	Riqoxuip,Huhmioq	
2	<input type="text"/>	<input type="text"/>		

Atta application/proposal as one PDF file.

Attac

- Co-Applicant
- Co-Principal Investigator
- Collaborator