

# UD Financials Job Aid

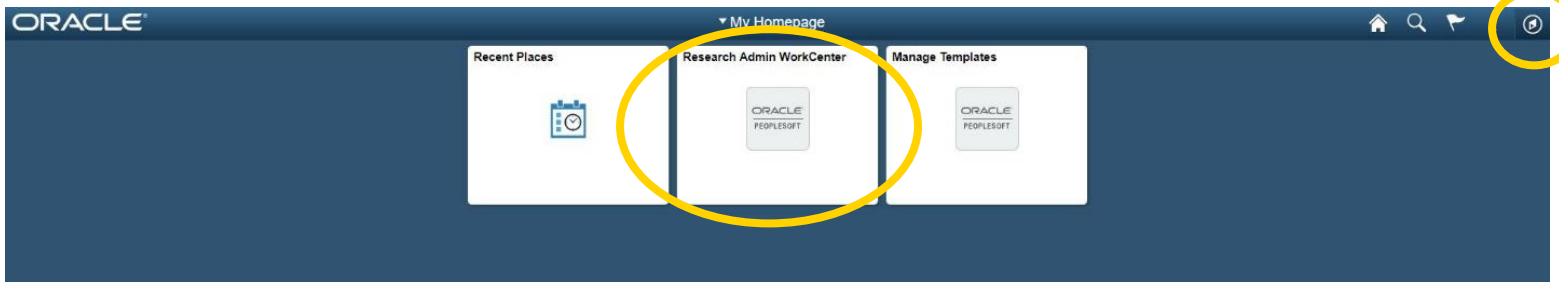
## Research Admin: Proposal Entry Activity Guide

**Overview:** The Proposal Entry Activity Guide was developed to ease the process of entering a proposal into UD Financials. The business process of entering and maintaining a proposal remains largely the same as it was prior to the 2018 UD Financials upgrade; the intent of the Activity Guide is to reduce clicks and consolidate all of the pages that are used to enter a proposal into one location.

The Activity Guide is a substitution for the “legacy” process for entering and maintaining proposals prior to the UD Financials upgrade. Users still have the ability to use the legacy process if they choose.

### Navigation

- To access the Activity Guide, navigate to the Research Admin WorkCenter, either via the tile on your homepage, or through the NavBar on the top right of the homepage (Grants > Research Admin WorkCenter) .



- Once in the Research Admin WorkCenter, click the “Express Proposals” link under the “Proposal” folder within the “Links” pagelet.



## Express Proposals Page

- When you click on the “Express Proposals” link, a new tab/window will open, taking you to the Express Proposals search page.



**Note:** If the tab/window does not open, make sure your browser’s pop-up blocker is not preventing it from opening

- Click the “Add a New Value” tab in order to start a new proposal.

**Express Proposals**

Find an Existing Value | **Add a New Value**

Business Unit UOD01

Proposal ID NEXT

Version ID V101

Add

Find an Existing Value | Add a New Value

A screenshot of the Express Proposals web interface. At the top, the title 'Express Proposals' is displayed. Below it are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is highlighted with a yellow circle. Underneath the tabs are three input fields: 'Business Unit' with the value 'UOD01', 'Proposal ID' with the value 'NEXT', and 'Version ID' with the value 'V101'. Below these fields is an orange 'Add' button. At the bottom of the form area, the same two tabs are shown again, with 'Add a New Value' being the active tab.

- There are three fields on the “Add a New Value” tab: **Business Unit, Proposal ID, and Version ID**. These should be defaulted to “UOD01” “NEXT” and “V101”



**Do not change these fields.**

- Click the “Add” button.
- There are 10 blank fields that require entry (**Institution ID** should default to “UOD01”).

**Title:** This will be the **Short Title/Description** used throughout the proposal. This is **not** the full title as submitted to the sponsor (that is its own field and will be populated later).

**PI ID:** Use the “Look Up” icon to search for the PI ID associated with the project.

**Sponsor ID:** Use the “Look Up” icon to search for the sponsor of the project.

**Start/End Date:** Select the start and end dates of the project.

**Department:** This field should auto populate when the **PI ID** is selected.

**Subdivision:** This field should auto populate when **PI ID** is selected.

**Keyword:** Use the “Look Up” icon to select the key word associated with the proposal from a list of key words available to the PI.

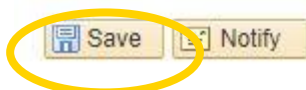
**Due Date Type:** Select either “SPNS – Sponsor Deadline” or “TRGT – Target Deadline.”

**Due Date:** Select the date the proposal is due to the sponsor by.

- After all 11 fields have information populated within them, click the “Save” button to launch the Activity Guide.

UOD Express Proposal

Business Unit	UOD01	Proposal ID	NEXT	Version	V101
*Title	Test Proposal Title				
*PI ID	10004	*Sponsor ID	0115		
*Start Date	09/01/2018	*End Date	08/31/2019		
*Department	02160	*Subdivision	02101		
*Institution ID	UOD01	*Keyword	SI_HEALTH		
Due Date Type	SPNS	Due Date	05/01/2018		



## Activity Guide Layout

- When the Activity Guide launches, the first page you will be taken to is the “Proposal” page. This is the 1st step of 11 necessary to submit a complete proposal.
- On the left side of the screen is the Task Panel, which lists the 11 steps of the Activity Guide. Each step is a single page that requires information prior to submission. On the top of the steps is a progress bar that will fill as you complete each step.
- On the right side of the screen is the page associated with the step. This page is no different than when it is navigated to outside of the Activity Guide.
- On the top right of the screen are four yellow buttons: **Previous**, **Next**, **Exit**, and **Mark Step Complete**.
  - **Previous**: Takes the user back one step. For example, if the user is on the “Project” step, clicking **Previous** will take the user to the “Keywords” step.
  - **Next**: Takes the user forward one step. For example, if the user is on the “Proposal” page, clicking **Next** will take the user to the **Additional Information** step.



**NOTE:** Navigation is also possible by clicking on the step within the Task Panel. If the user wants to navigate from the Proposal step to the Attachments step, clicking “Attachments” is a quicker way to navigate than clicking **Next** 9 times.

- **Exit**: Allows the user to leave the Activity Guide and complete the proposal later. Clicking **Exit** will prompt the user to save if they haven’t done so, and will take the user to the Express Proposals search page.
- **Mark Step Complete**: Indicates that all the information required on a page has been input, and the step is complete. Clicking this will partially fill the progress bar and causes a green checkmark to appear next to the step that was just completed.

**Task Panel**

**Navigation Buttons**

Period	*Start Date	*End Date	Target Sponsor Budget
1	09/01/2018	08/31/2019	

## Returning to a Proposal in Progress

- You are able to save and exit the Activity Guide anytime after completing the Express Page without having to worry about losing the proposal in-progress.
- In order to return to a proposal, whether that proposal is in-progress or complete, navigate to the “Express Proposals” link in the Research Admin WorkCenter.
- On the “Find an Existing Value” tab, enter any information you have for the proposal.
- Once you locate the proposal you are looking for, you will land on the Proposal Overview page. This page shows the progress of each step of the proposal you are working on.
- Click on “Go to Activity Guide Instance” to re-enter your proposal.
- If you click the yellow “**Add to My Proposals**” button on the **Proposal** step, the proposal will be added to your **My Proposals** page. However, if you click this button and exit out of the activity guide, you **cannot** return to the proposal through the Express Search Page. You must return to the proposal either via “Maintain Proposal” or the **My Proposals** page.

UOD Express Proposal

Business Unit UOD01 Proposal ID 18A00993 Version V101

\*Title

\*PI ID  \*Sponsor ID

\*Start Date  \*End Date

\*Department  \*Subdivision

\*Institution ID  \*Keyword

Due Date Type  Due Date

[Go to Activity Guide Instance](#)

Activity Guide Instance					
Action Item	Status		Template	User ID	Created Date/time
Proposal	Completed	✓	RO Proposal Entry Activity Guide	rbarthol	03/15/18 11:53AM
Additional Information	Completed	✓	RO Proposal Entry Activity Guide	rbarthol	03/15/18 11:53AM
Location	Completed	✓	RO Proposal Entry Activity Guide	rbarthol	03/15/18 11:53AM
Keywords	Completed	✓	RO Proposal Entry Activity Guide	rbarthol	03/15/18 11:53AM
Project	Completed	✓	RO Proposal Entry Activity Guide	rbarthol	03/15/18 11:53AM

## Submitting the Proposal and Completing the Activity Guide

The process for submitting a proposal and routing it to UD Web Forms remains the same as it was prior to the Activity Guide. The last step of the Activity Guide, “Change Status,” is specifically the user to change the **Proposal Status** from “Draft” to “Pending Approval.” Changing the status and clicking “Save” will route the proposal to the Web Form, where the process for approval remains exactly the same.

## Activity Guide Tips and Tricks

- Users still have the option to enter proposals outside of the Activity Guide, through the “Maintain Proposal” page. The pages in the Activity Guide are exactly the same as the pages in “Maintain Proposal.”

If a proposal is started in the Activity Guide, it can be continued outside of the Activity Guide if the user desires (using “Maintain Proposal”). If any changes are made while outside of the Activity Guide, those changes will be reflected in the Activity Guide if the user re-opens the proposal through the “Express Proposals” link.

- The Activity Guide will assume your proposal has one budget period, with the start and end dates being the dates provided on the Express Page. If your proposal has more than one budget period, you can add additional budget periods on the **Proposal** step. The “Build Periods” button will initially be grayed-out, but deleting the first budget period row will allow you to adjust the dates, input the number of periods, and build the periods.
- If a proposal is started *outside of* the Activity Guide, it **cannot** be continued in the Activity Guide. A proposal cannot be worked on in the Activity Guide if it is not created using the Express Proposals page.
- If the user navigates to a different tab while on a step (for example, clicking on the “Projects” tab while on the “Proposal” step), they can still enter and save information.

This information will still appear when the user eventually navigates to the step the tab is featured on.