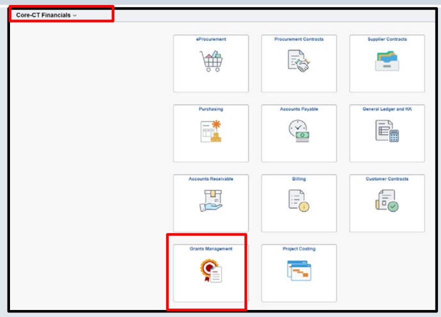
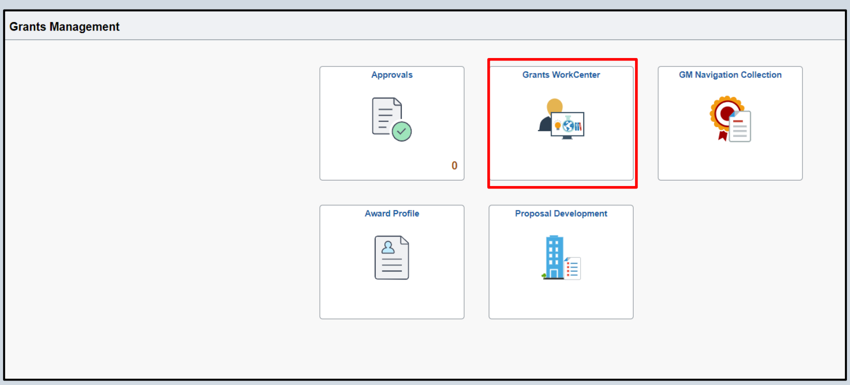
Create a Grant Proposal

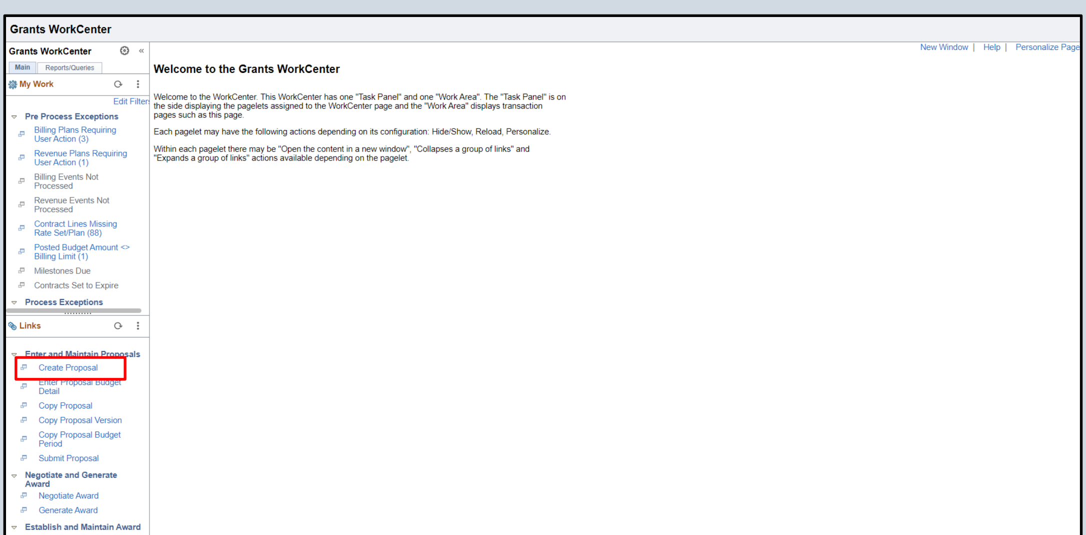
Purpose:
This job aid will help you create a Grant Proposal in Core-CT.

Steps	Screenshots
1. Navigate to the **Maintain Proposal** page: ***Nav Bar > Menu > Core-CT Financials > Grants > Proposals > Maintain Proposal*** OR ***Core-CT Financials > Grants > Grants Workcenter > Create Proposal***	
2. Select ***Core-CT Financials*** then select the ***Grants Management Tile***	

3. Select ***Grants Workcenter*** Tile



4. Select ***Create Proposal***



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5. Select the **Add a New Value** tab. 6. Use the lookup icon to select a valid **Business Unit**. 7. Click the **Add** button.	

8. Enter a description in the **Description** field (20 char. max).

9. Enter a proposal title in the **Title** field.

10. Enter a long description in the **Long Description** field (254 char. max).

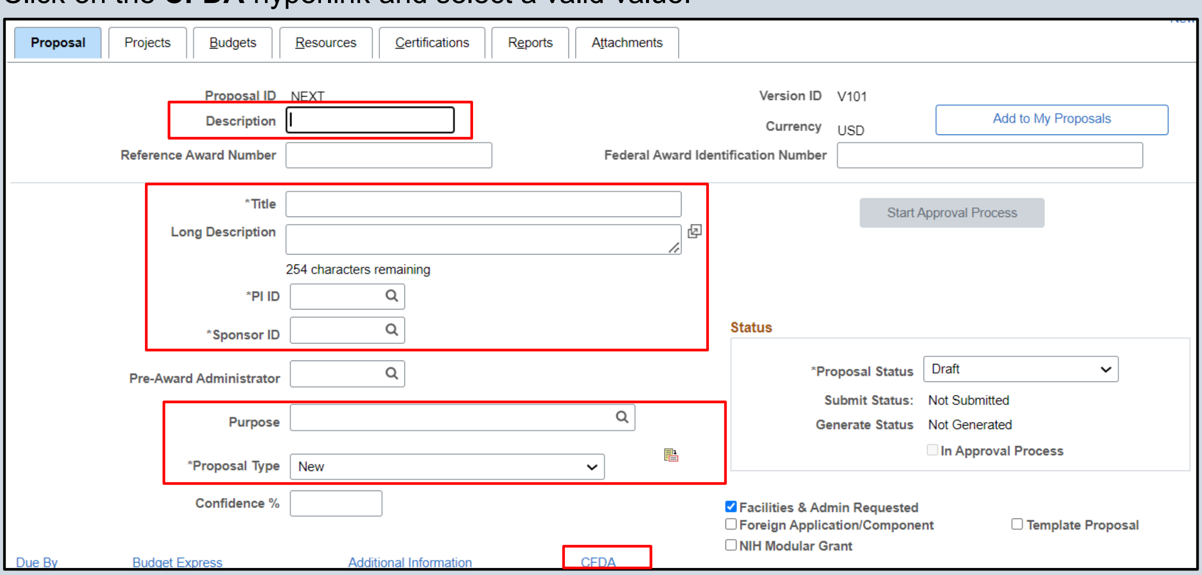
11. Click on the **PI ID** lookup and select a valid value.

12. Click on the **Sponsor ID** lookup and select a valid value.

13. Click on the **Purpose** lookup and select a valid value.

14. Select a valid **Proposal Type** from the dropdown menu.

15. Click on the **CFDA** hyperlink and select a valid value.



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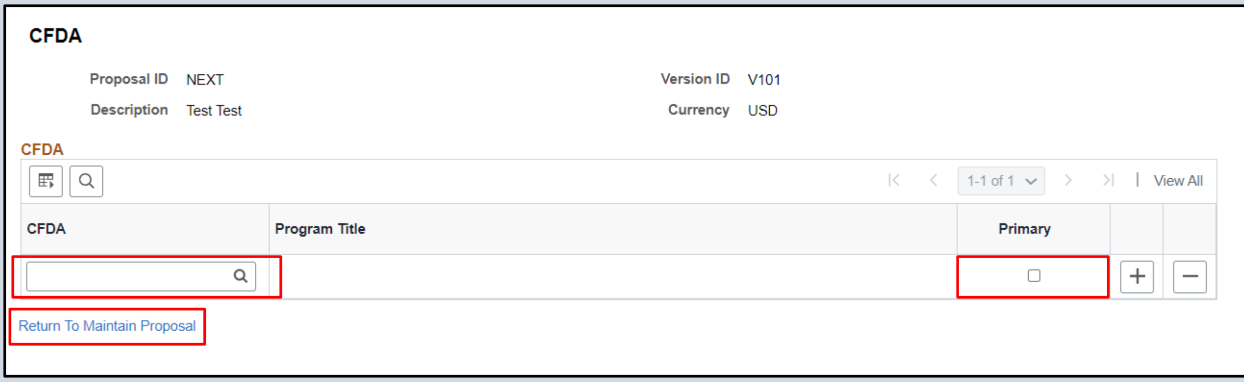
Steps	Screenshots

16. Click on the lookup to select a valid **CFDA** number.

17. Click the checkbox for **Primary**.

18. Click on the **Return to Maintain Proposal** hyperlink.



19. Enter a **Start Date** and **End Date** or use the **Calendar** icons to select dates.

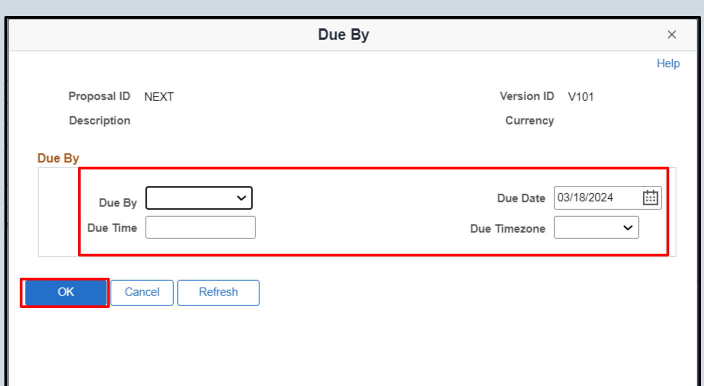
20. Enter the number of budget periods in the **No. Periods** field.

21. Click the **Build Periods** button.

22. Click the **Due By** hyperlink.

23. Enter the **Due By**, **Due Date**, **Due Time** and **Due Timezone** to inform Approvers when the proposal is due.

24. Click the **OK** button.



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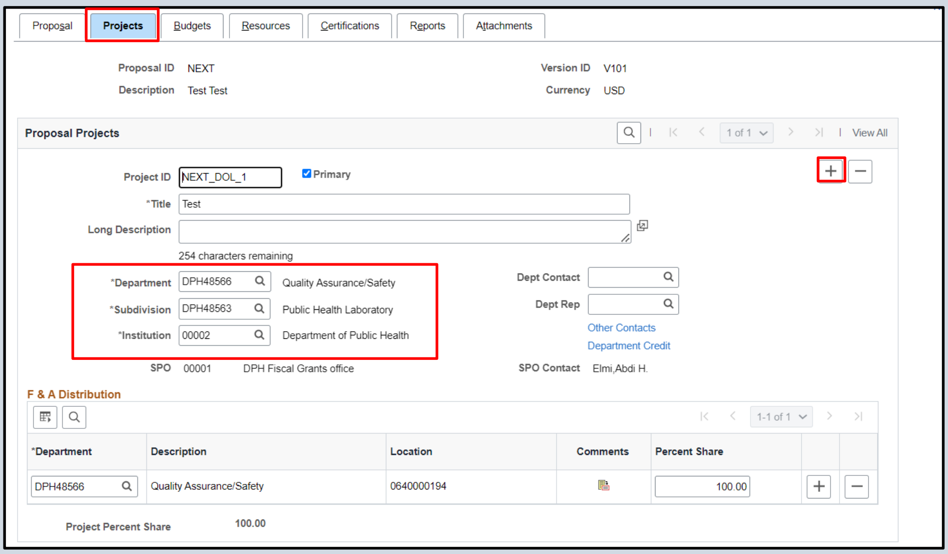
25. Click on the **Projects** tab.

26. The **Department**, **Institution** and **Subdivision** fields default based on the PI selection. Click on the lookup icons to select a different **Department**, **Institution** and **Subdivision**, if necessary.

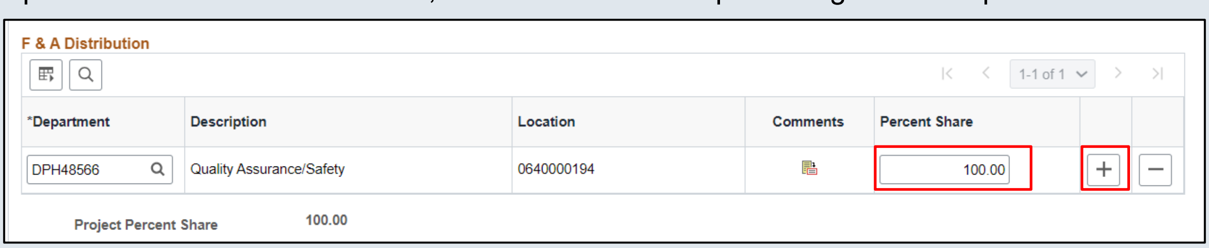
27. To add additional projects, click on the "**+**" button to add additional projects.



28. In the **F & A Distribution** section, the **Department** field defaults based on the PI selection. Click on the lookup icons to select a different **Department** for Facilities and Administration Distribution, if necessary.

29. If multiple departments will share the F&A Distribution, click on the "**+**" button and use the lookup icon to select another **Department**.

30. Update the **Percent Share** value, so that the total sum percentage for all departments is **100%**.



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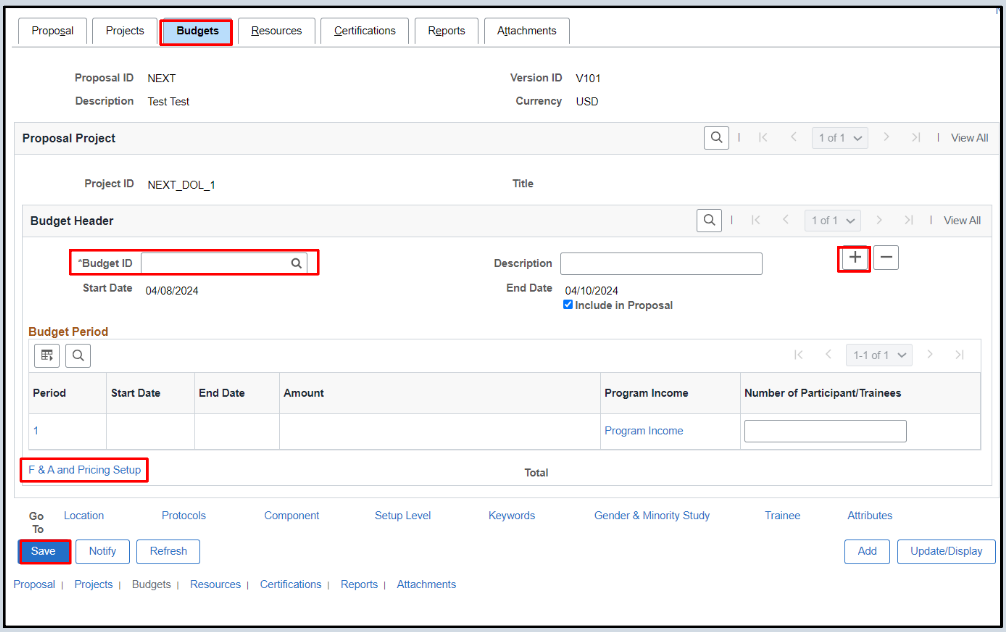
31. Click on the **Budgets** tab.

32. Click on the **Budget ID** lookup icon to select a **Budget ID (Activity)**.

33. To add additional Activities, click on the “**+**” button and use the lookup to select a **Budget ID**.

34. Click the **Save** button. The Budget Periods will populate for the remainder of the project.

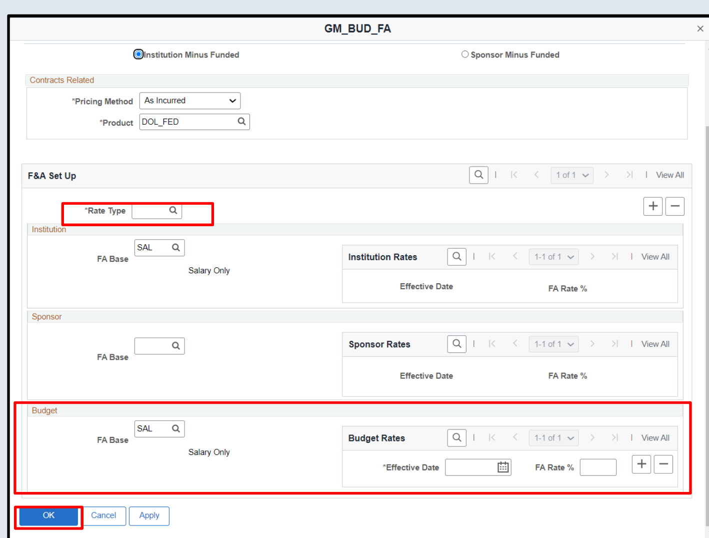
35. Click on the **F & A and Pricing Setup** hyperlink.



36. Click on the **Rate Type** lookup to select **GRANT** as the Rate Type.

37. Verify that the **FA Base** and **Budget Rates** are accurate.

38. Click the **OK** button.



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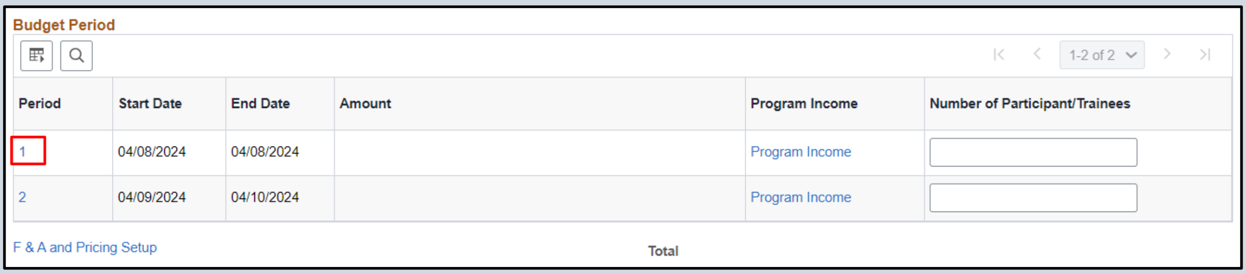
Steps	Screenshots

39. Click the **1** hyperlink to add the budget for that **Budget Period** for that **Activity**.



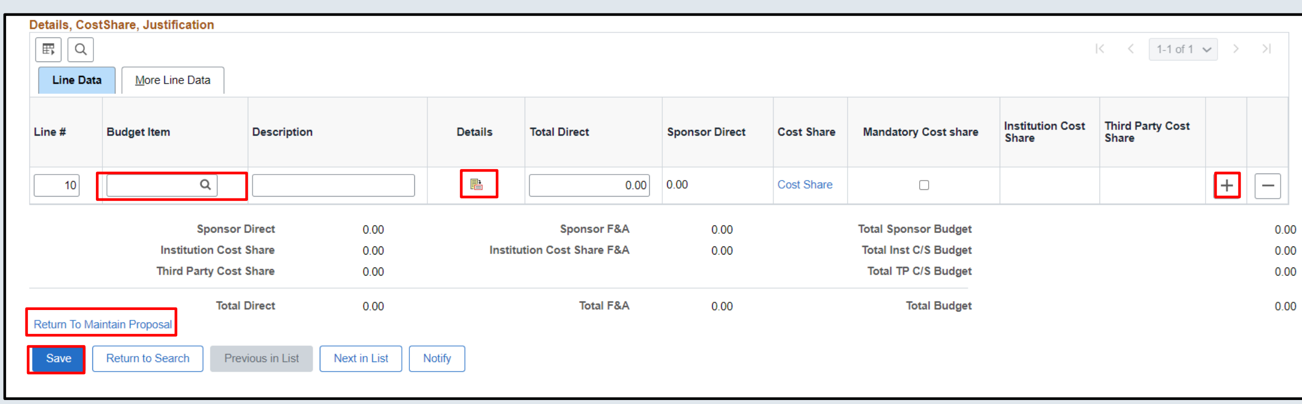
40. Click on the **Budget Item** lookup icon to select a Budget Item.

41. Click on the **Details** icon to enter in Details about the Budget Item or enter in a high-level **Total Direct** amount.

42. Click the "**+**" button to add additional Budget Items for that Activity and repeat steps 40-43.

43. Click the **Save** button. The totals for that Budget Item will display below.

44. Click the **Return to Maintain Proposal** hyperlink.



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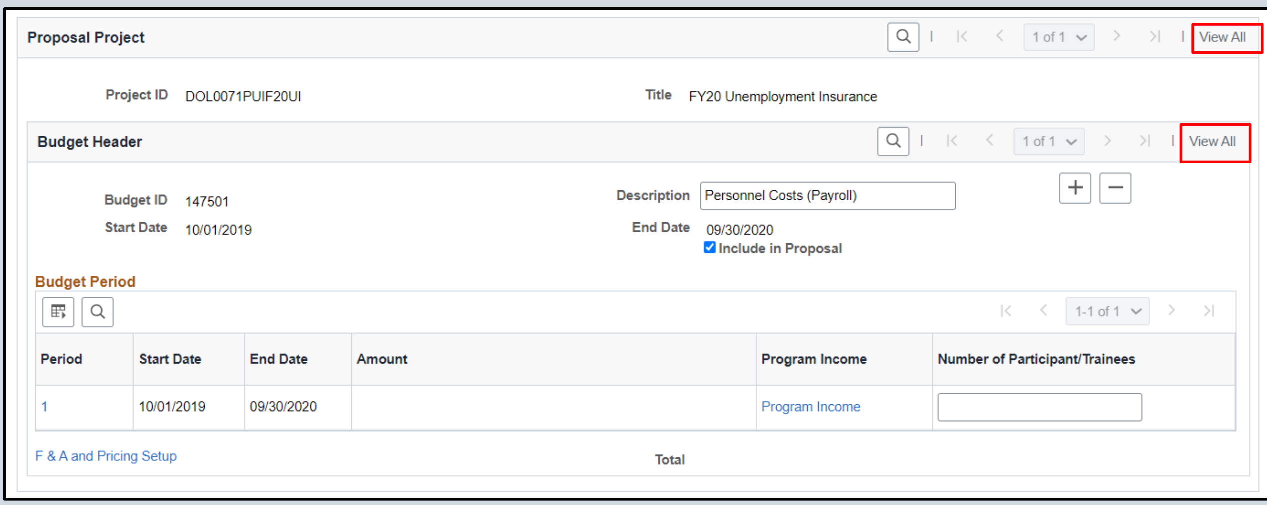
Steps	Screenshots

45. If multiple Budget IDs were created, in the **Budget Header** section, click the **View All** hyperlink to view multiple **Budget IDs**.

46. If multiple Projects were created, in the **Proposal Project** section, click the **View All** hyperlink to view multiple projects.

47. If multiple Budget IDs, Budget Periods or Projects were created, repeat steps 39-43 as needed to continue entering a budget.



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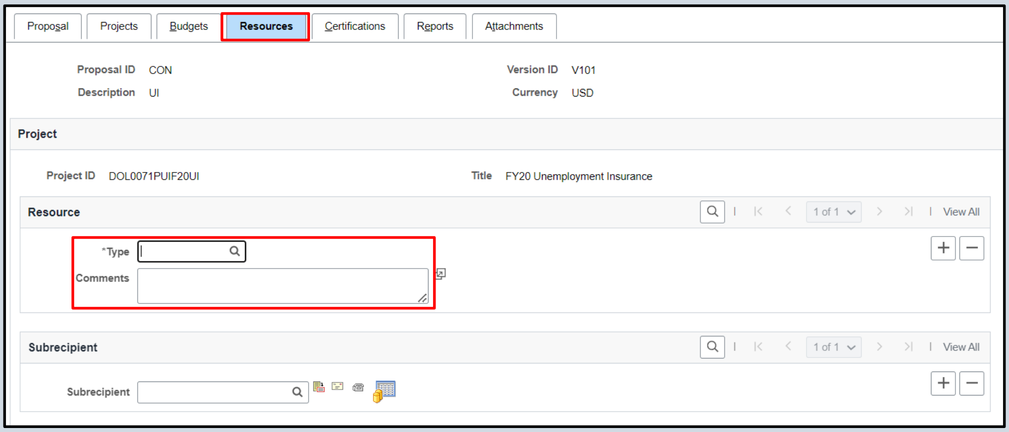
48. Click on the **Resources** tab.

49. In the **Resource** section, click the **Type** lookup icon to select a Resource Type.

50. Enter in **Comments**.



51. In the **Professional** section, the PI will automatically display from the Proposal tab.

52. Click the "**+**" button to add additional Professionals. If Workflow is being used, there needs to be rows assigned for each role in the Workflow (ex. Principal Investigator, Branch/Section Chief, Fiscal Officer, etc.)

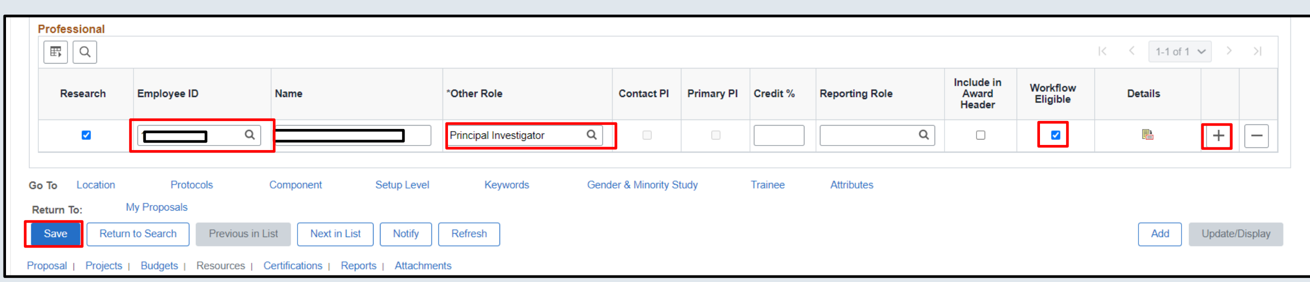
53. Click the **Employee ID** lookup icon to select the employee.

54. Click the **Other Role** lookup icon to select the employee's role in the proposal.

55. Click the **Workflow Eligible** checkbox if the employee should be included in the Workflow.

56. Repeat steps 52-55 as needed for all key Professionals involved with this Grant Proposal.

57. Click the **Save** button.



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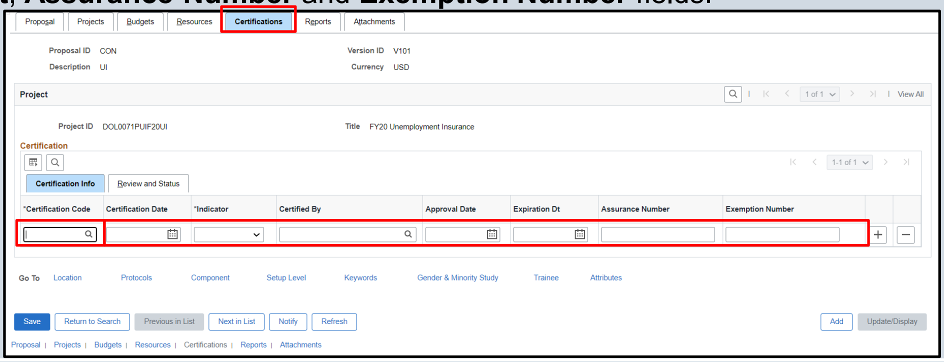
Create a Grant Proposal: Optional Pages

Steps	Screenshots

58. Optional: To enter Certifications, click on the **Certifications** tab.

59. Click on the **Certification Code** lookup icon to select the Certification type.

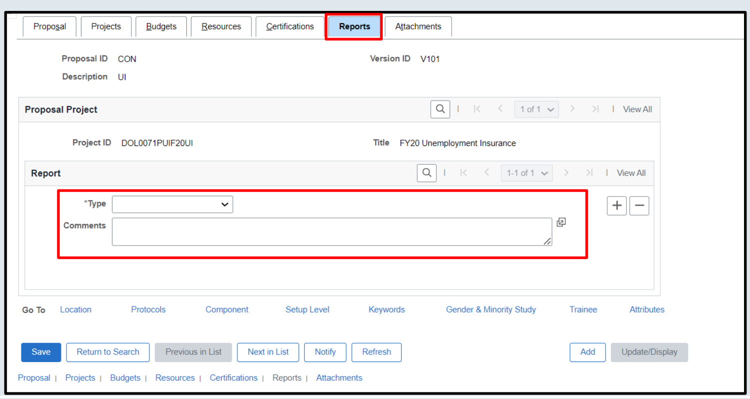
60. Enter additional information in the **Certification Date**, **Indicator**, **Certified By**, **Approval Date**, **Expiration Dt**, **Assurance Number** and **Exemption Number** fields.



61. Optional: To notify anyone viewing the proposal that a report is required, click on the **Reports** tab.

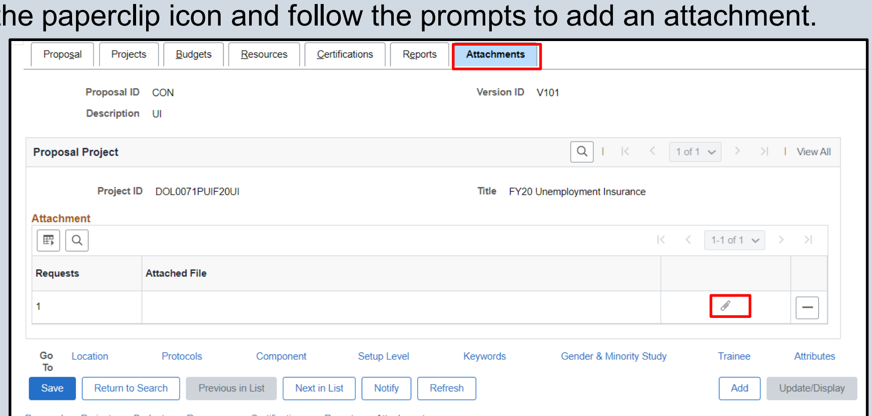
62. Select a Report **Type** from the dropdown menu.

63. Enter in **Comments**.



64. Optional: To add an attachment to the proposal, click on the **Attachments** tab.

65. Click on the paperclip icon and follow the prompts to add an attachment.



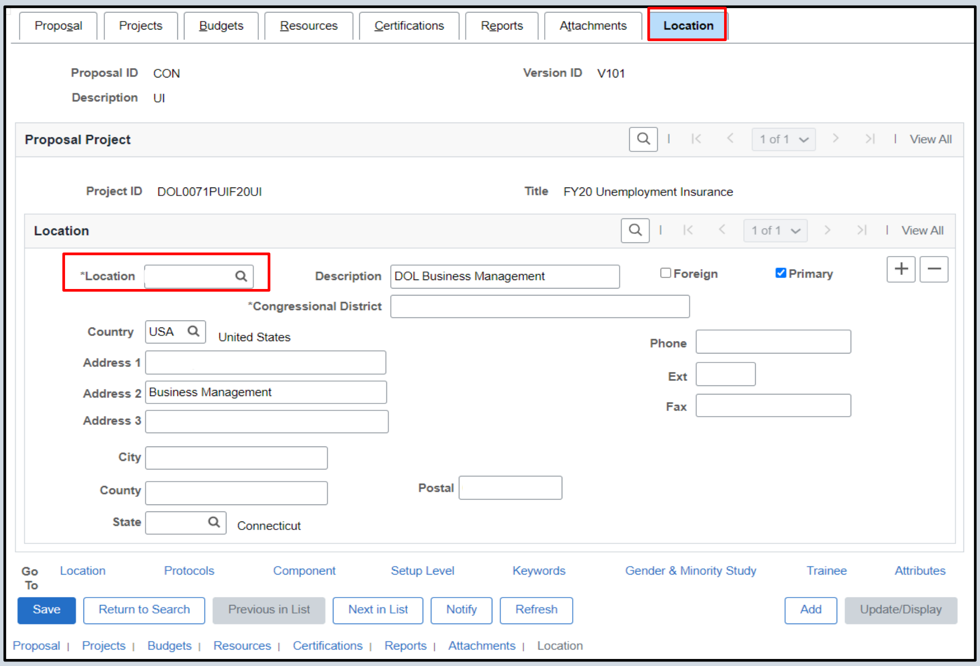
Create a Grant Proposal: Optional Pages

Steps	Screenshots

66. Optional: To view or update the project location, click on the **Location** hyperlink.

67. Click on the **Location** lookup icon to select a different location.

*Note: For tabs that do not display at the top of page use the options in the **Go To** section of the page to navigate*



68. Optional: To add keywords to the proposal, click on the **Keywords** hyperlink.

69. Click on the **Keyword** lookup icon to select a keyword.