

Initiate Workflow

Purpose:

This job aid will help you initiate Workflow for a Grant Proposal in Core-CT.

Steps	Screenshots			
 Navigate to the Maintain Proposal page > Proposals > Maintain Proposal OR C Grants Workcenter > Create Proposal 	: Nav Bar > Menu > core-CT Financials >	Core-CT F Grants M	Financials Ianageme	> Grants nt >
2. Select Core-CT Financials then select the Grants Management Tile	Core-CT Financials ~	eProcurement	Procurement Contracts	Registr Contracts
		Purchasing	Accounts Payable	General Ledger and KK
		Accounts Receivable	Billing	Customer Contracts
		Grants Management	Project Costing	
3. Select Grants Workcenter Tile				
	Grants Management	Approvals	Grants WorkCenter	GM Navigation Collection
		0		<u>Ç</u>
		Award Profile	Proposal Development	
4. Then, Create Proposal				

-	New Window Halo Decrement
Grants WorkCenter ③ «	rentrikun [regi] residen
Main Reports/Queries	Welcome to the Grants WorkCenter
🎄 My Work 🛛 😔 🗄	
Links O i	Twescree to the work-effect in swork-effect has one inask rame and one work-weat in eliask rame is on the side displaying the pagelets assigned to the Work-effect and the 'Work-Weat' displays transaction pages such as this page.
 Enter and Maintain Proposals 	Each pagelet may have the following actions depending on its configuration: Hide/Show, Reload, Personalize.
Create Proposal	Within each pagelet there may be "Open the content in a new window", "Collapses a group of links" and
Enter Proposal Budget Detail	"Expands a group of links" actions available depending on the pagetet.
Copy Proposal	
Copy Proposal Version	
Copy Proposal Budget Period	
Submit Proposal	
 Negotiate and Generate 	
Award Neoptiate Award	
P Generate Award	
Establish and Maintain Award	
P Award	
IP Contract	
Establish Project General Info	
P Update Project Activity	
Project Budgets	
P Mestone Notification	
 Modify Awards 	
Create Continuation	
P Maintain Limits	
 Monitor Awards 	
Review Project Budgets	
A Modifications	
@ Contract Summary	
# Contract Details	
Contract Amendments	



Initiate Workflow

Screenshots

Steps

5. Use the lookup icon to select a valid **Business Unit**.

6. Use the lookup icon to select a valid **Proposal ID** or enter any other search criteria.

7. Click the Search button.

an Existi	ing Value						⊕ Add a New Value
ch Criteria	a						
iy informatii	on you have and c	lick Search. Leave	lields blank for a list of all	values.			
ecent earches	Choose from recei	nt searches	~ 0 ~	Searches	Choose from saved sear	thes	~ //
	*Business Unit	= •		Q			
	Proposal ID	begins with 🐱		Q			
	Version ID	begins with 🗸		Q			
	PI ID	begins with \checkmark		Q			
	Sponsor ID	begins with 🐱		Q			
	Туре	= 🗸	~				
	Status	= 🗸	~				
	Department ID	begins with \checkmark		Q			
	Short Title	begins with 🐱					
Ten	nplate Proposal	begins with \checkmark					
	Show	v fewer options					
	🗆 Case	e Sensitive					

8. Click on the **Resources** tab and verify that the accurate **Professionals** are included as **Workflow Eligible**.

Propogal	Projects <u>B</u> udgets	Resources Certifications	Reports Attachments										
Prop	osal ID CON0000151		Version ID Currency	V101 USD									
roject										a i k k	1 of 6 🗸 🔿	IK	View All
Project ID	00000000000280		Title FY24 Bureau	u of Labor	Statistics - LM	I							
Resource						QI		1 of 1 \checkmark \rightarrow \rightarrow	View All				
Comr	*Type OTHER C	L	Ø					[+ -				
			1.										
Subrecipient						QI		1 of 1 ♥ > >	View All				
Subrecipient	ipient	م 🗎 🖻 🖷 🎒				QI		toft ♥ > > I	View All				
Subrecipient Subrec	ipient	Q 🖹 🗆 🕿 🏭				Q I		toft♥ >> I	View All		K C 1.4 of 4		
Subrecipient Subreci Professional IIII Q Research	Employee ID	م 🖪 🕫 🖝 🚛	*Other Role		Contact PI	Q Primary PI	K K	Reporting Role	View All	Workflow Eligible	IC C 1-4 of 4	v >	
Subrecipient Subreci Professional E: Q Research	Employee ID	Q B C Corey R.	•Other Role	Q	Contact PI	Q Primary PI	K < Credit %	Reporting Role	View All	Workflow Eligible	K < 1-4 of 4 Details	+	Э
Subrecipient Subreci Professional Research	Employee ID 121212 C 131313 C	Q B C Corp R B Evven, Corp R A Holaye, Ashtey	Other Role Principal Investigator Fiscal Officer	Q Q	Contact PI	Q Primary Pl	K <	Reporting Role	View All	Workflow Eligible	K < 1-4 of 4 Details	✓ >	Э
Subrecipient Subreci Professional EP Q Research	Employee ID 121212 C 131313 C 141414 C	Q B C Corp R. A Bovens Corey R. A Halaye Ashley A Richard Brian	Other Role Principal Investigator Fiscal Officer Branch/Section Chief	Q Q Q	Contact PI	Q Primary Pl	K < [Reporting Role	View All	Workflow Eligible	K K Indefa	>	к



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Screenshots

Steps

9. Click on the **Proposal** tab.

10. Click on the Start Approval Process button.

Proposal Projects Budgets	Resources Certifications Reports Attachments
Proposal ID Description Reference Award Number	CON0000151 Version ID V101 UI Currency USD Add to My Proposals Federal Award Identification Number
*Title Long Description	FY24 labor stat Start Approval Process FY24 labor stat Ø
*PI ID	239 characters remaining 121213 Q Bowens, Corey R.
*Sponsor ID	FED019 Q Health and Human Services (HHS) Status
Pre-Award Administrator	Q *Proposal Status Draft V
Purpose	Q Generate Status Not Generated
*Proposal Type	New V
Confidence %	Facilities & Admin Requested Foreign Application/Component
Due By Budget Express	Additional Information CFDA

11. Click the **Yes** button in the popup message.

Are you sure you want	to trigger Compo	nent Approval P	Process? (9395,1190)
This will trigger Propos	al Component Ap	proval Workflov	v process.
	Yes	No	
			5

12. The **Proposal Status** displays **Pending Approval** and the proposal fields are locked for editing.

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*Title Long Description	FY24 labor stat Start Approval Process FY24 labor stat B
*PI ID	239 characters remaining 121212 Q Bowens,Corey R.
*Sponsor ID Pre-Award Administrator	FED019 Q Health and Human Services (HHS) Status Q *Proposal Status Pending Approval
Purpose	Submit Status: Not Submitted Q Generate Status Not Generated
*Proposal Type Confidence %	New