

Initiate Workflow

Purpose:

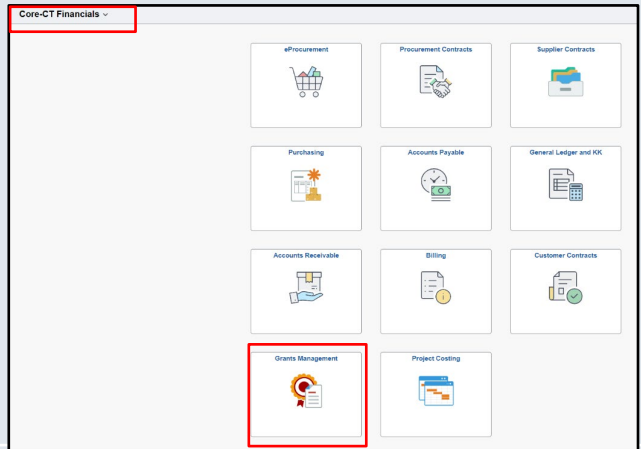
This job aid will help you initiate Workflow for a Grant Proposal in Core-CT.

Steps

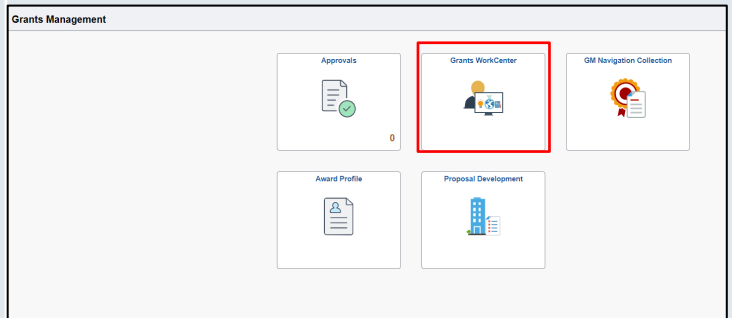
Screenshots

1. Navigate to the **Maintain Proposal** page: **Nav Bar > Menu > Core-CT Financials > Grants > Proposals > Maintain Proposal OR Core-CT Financials > Grants Management > Grants Workcenter > Create Proposal**

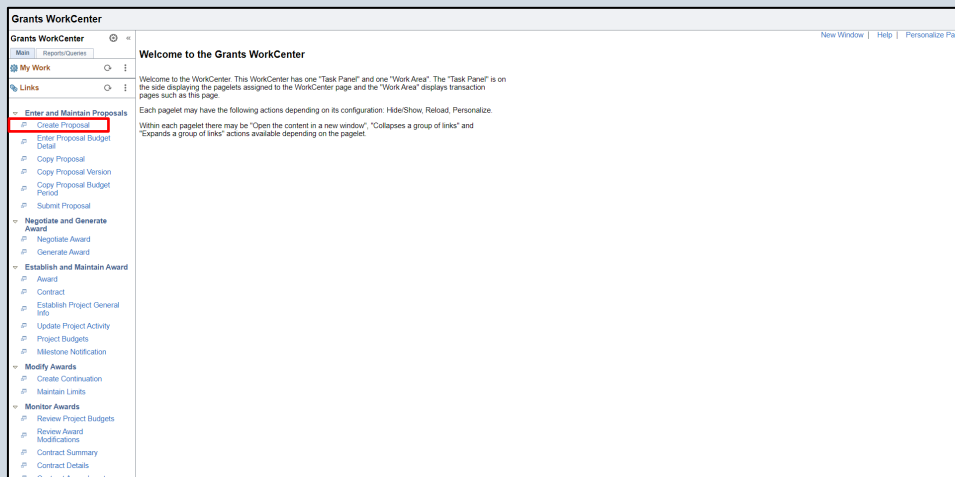
2. Select **Core-CT Financials** then select the **Grants Management Tile**



3. Select **Grants Workcenter Tile**



4. Then, **Create Proposal**



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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.

Screenshots

Maintain Proposal

Find an Existing Value ⊕ Add a New Value

Search Criteria
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches Saved Searches Choose from saved searches

*Business Unit

Proposal ID begins with

Version ID begins with

PI ID begins with

Sponsor ID begins with

Type

Status

Department ID begins with

Short Title begins with

Template Proposal begins with

[^ Show fewer options](#)

Case Sensitive

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

Proposal Projects Budgets **Resources** Certifications Reports Attachments

Proposal ID CON0000151 Version ID V101
Description LRI Currency USD

Project | 1 of 6 |

Project ID 00000000000200 Title FY24 Bureau of Labor Statistics - LMI

Resource | 1 of 1 |

*Type OTHER

Comments

Subrecipient | 1 of 1 |

Subrecipient

Professional | 1-4 of 4 |

Research	Employee ID	Name	*Other Role	Contact PI	Primary PI	Credit %	Reporting Role	Include in Award Header	Workflow Eligible	Details		
<input type="checkbox"/>	<input type="text" value="121212"/> <input type="button" value="Q"/>	<input type="text" value="Bovens Corey R."/> <input type="button" value="Q"/>	<input type="text" value="Principal Investigator"/> <input type="button" value="Q"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Details"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/>	<input type="text" value="131313"/> <input type="button" value="Q"/>	<input type="text" value="Ndlaye Ashley"/> <input type="button" value="Q"/>	<input type="text" value="Fiscal Officer"/> <input type="button" value="Q"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Details"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/>	<input type="text" value="141414"/> <input type="button" value="Q"/>	<input type="text" value="Richard Brian"/> <input type="button" value="Q"/>	<input type="text" value="Branch/Section Chief"/> <input type="button" value="Q"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Details"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/>	<input type="text" value="123456"/> <input type="button" value="Q"/>	<input type="text" value="Flaherty Patrick J."/> <input type="button" value="Q"/>	<input type="text" value="Project Manager"/> <input type="button" value="Q"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Details"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

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

10. Click on the **Start Approval Process** button.

The screenshot shows a web form for a proposal. At the top, there are tabs: **Proposal** (highlighted with a red box), **Projects**, **Budgets**, **Resources**, **Certifications**, **Reports**, and **Attachments**. The form contains several fields: Proposal ID (CON000151), Description (UI), Reference Award Number, Federal Award Identification Number, Version ID (V101), Currency (USD), and an **Add to My Proposals** button. Below these are fields for Title (FY24 labor stat), Long Description (FY24 labor stat, 239 characters remaining), PI ID (121212), Sponsor ID (FED019), Pre-Award Administrator, Purpose, Proposal Type (New), and Confidence %. A **Start Approval Process** button is highlighted with a red box. On the right, a **Status** section shows Proposal Status (Draft), Submit Status (Not Submitted), Generate Status (Not Generated), and an for In Approval Process. At the bottom, there are checkboxes for Facilities & Admin Requested, Foreign Application/Component, and NIH Modular Grant, along with links for Due By, Budget Express, Additional Information, and CFDA.

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

The screenshot shows a confirmation popup message with the text: "Are you sure you want to trigger Component Approval Process? (9395,1190) This will trigger Proposal Component Approval Workflow process." Below the text are two buttons: **Yes** (highlighted with a red box) and **No**.

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

The screenshot shows the same proposal form as in step 10, but with the **Proposal Status** dropdown menu set to **Pending Approval** (highlighted with a red box). The **Start Approval Process** button is now disabled. The rest of the form fields and layout are identical to the previous screenshot.