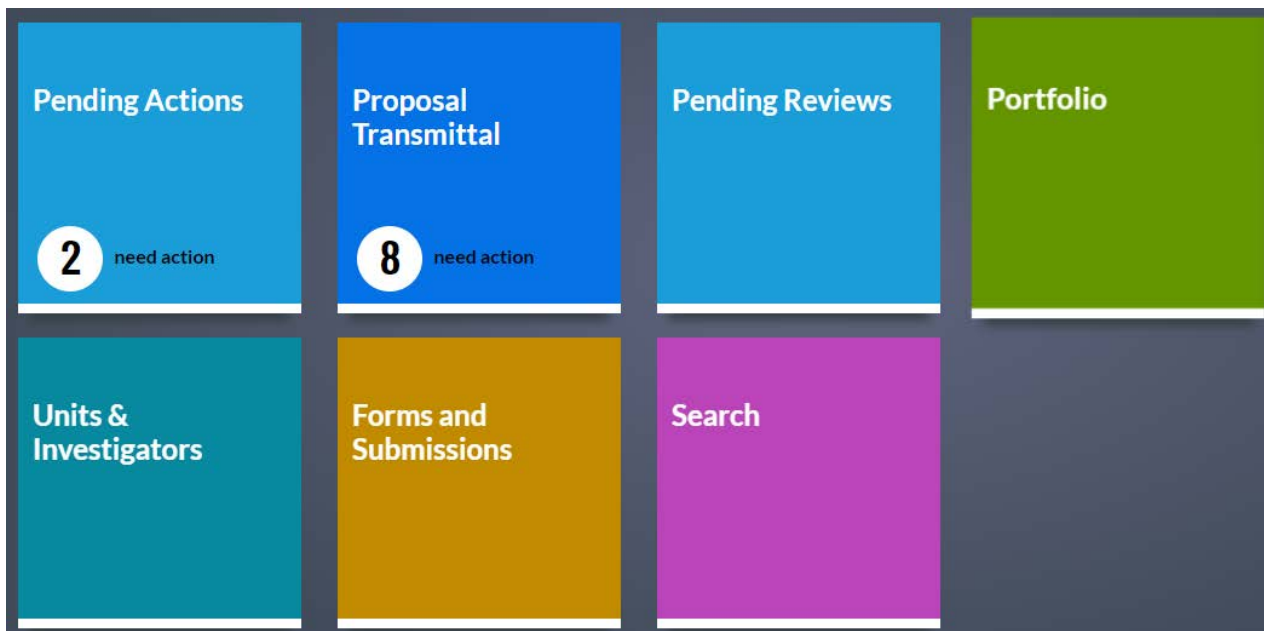


Navigating & Searching myResearch Portal

Dashboard (Most will not see all buttons)



- Pending Actions – Primarily for Approvers, will only show if you have Pending Actions from *myProposals* including PI/Faculty/Deans/Department Heads.
- Proposal Transmittal – Primarily for Business Managers, will only show if you have proposals that need action from *myProposals*.
- Pending Reviews – Central Office use only.
- Portfolio – Shows proposals where PI/Faculty/Researchers are listed as personnel.
- Units & Investigators – View all documents where Business Managers have unit access.
- Forms and Submissions – Various links to other sponsor research tools.
- Search – Search all documents based on various criteria

Search

1. Search

myResearch Portal Proposal Transmittal Portfolio Units & Investigators Submissions **Search**

Search Portfolio: Administrative

Enter search terms into at least one field.

2. Criteria

Title	Banner Grant Code	Campus
Sponsor	Institution ID <small>(Proposal, Agreement, or Subaward #)</small>	Unit
Sponsor Number (IP or Award)		Investigator


Include Clear All Selections

Proposals <input checked="" type="checkbox"/> In-Development <input checked="" type="checkbox"/> Central Office Review <input checked="" type="checkbox"/> Pending with Sponsor <input type="checkbox"/> Awarded <input type="checkbox"/> Non-Funded <input type="checkbox"/> Withdrawn	Agreements <input checked="" type="checkbox"/> Pending <input checked="" type="checkbox"/> Active <input type="checkbox"/> Closed <input type="checkbox"/> Withdrawn <input type="checkbox"/> Expired	Subagreements <input checked="" type="checkbox"/> Pending <input checked="" type="checkbox"/> Active <input type="checkbox"/> Closed <input type="checkbox"/> Expired
--	---	--

3. Include

Search Reset

4. Search & Reset

1. Search - Click the Search button or Search link to open the Search Screen.
2. Criteria – Type in or press the down arrow to select items in each field.
 - Title – Project Title.
 - Sponsor – Funding Sponsor’s Name.
 - Sponsor # (IP or Award) – Search by either the Sponsor Award Number or Proposal Tracking Number. The Sponsor Award Number is issued by the Sponsor. This number can be found on an IP (Institutional Proposal) or an Award record. The Proposal Tracking Number is automatically assigned by the Sponsor upon submission.
 - Banner Grant Code – Post Award assigned number in Banner.
 - Intuition ID (Proposal, Agreement, or Subward #) – Field that will search based on IP, Proposal Transmittal, Agreement, or Subward #.
 - Campus – Select a campus (only visible if you have access to more than one campus).
 - Unit – Name of the unit.
 - Investigator – Name of the PI or Co-PI.
 -  – Button for accessibility for screen readers.
3. Include – Check items to limit the status of the search. By default, several items are already selected. Click the **Clear All Selections** box to clear all checked boxes in Include.
 - Proposals
 - In-Development – Proposals created in *myProposals* but not yet submitted to Central Office.
 - Central Office Review – Proposals submitted to Central Office but still under review.
 - Pending with Sponsor – Proposals submitted and approved by Central Office then submitted but not yet funded by sponsor.
 - Awarded – Proposal submitted and approved by Central Office and were awarded by sponsor.
 - Non-Funded – Proposals submitted and approved by Central Office and rejected or never funded by sponsor.
 - Withdrawn – Proposals submitted and approved by Central Office and withdrawn from sponsor consideration at the department’s or sponsor’s request.
 - Agreements/Subagreements
 - Pending – Under review by negotiator or awards processor and pending approval and signature.
 - Active – Executed awards/contacts and/or accepted by the Board of Trustees and are still within the active term of the award/agreement. If a funded award, also still active in Banner.
 - Closed – Executed and/or accepted by the Board of Trustees and are now closed in Banner or if unfunded have expired/terminated.
 - Withdrawn – Submitted to Central Office but were administratively withdrawn by either the department, sponsor or Central Office prior to acceptance or full execution.
 - Expired – Executed and/or accepted by the Board of Trustees are at least 60 days past the period of performance end date or termination date but not yet closed in Banner or marked as Closed in myProposals.
4. Search & Reset - Click the **Search** button to initiate your search. Click the **Reset** link to reset the search.

Filter Results

myResearch Portal Proposal Transmittal Portfolio Units & Investigators Submissions Search

Filter Results

5. Export Options [Filter Records](#)

Copy CSV Excel Print Show 50 rows Column Visibility 6. Views

Showing 1 to 21 of 21 entries (filtered from 350 total entries) 7. Filter Results

Principal Investigator	Sponsor	Project Title	Banner Grant Code	Transaction	Status	Amount	Start Date	End Date	View Personnel	Actions
	NSF (Natl Science Fdn)		Box	Award or Agreement	Active					
	NSF (Natl Science Fdn)			Proposal	Pending					
	NSF (Natl Science Fdn)			Proposal	Pending					

8. Actions

5. Export Options – Click a button to export the data.

6. Views

- Show 50 rows – Click to select to show more, less or all rows.
- Column visibility – Click to select more columns to view. NOTE: Column visibility must be selected for every search. These preferences are not saved/

7. Filter Results – Click the **Project Title** to open the record and view more information. Click a column heading to sort. Click on the **View Personnel** icon



to view additional personnel on the record.

8. Actions

- Financial Details icon – View more details on the award.
- Non-Funded icon – Notify Central Office that a proposal is non-funded.