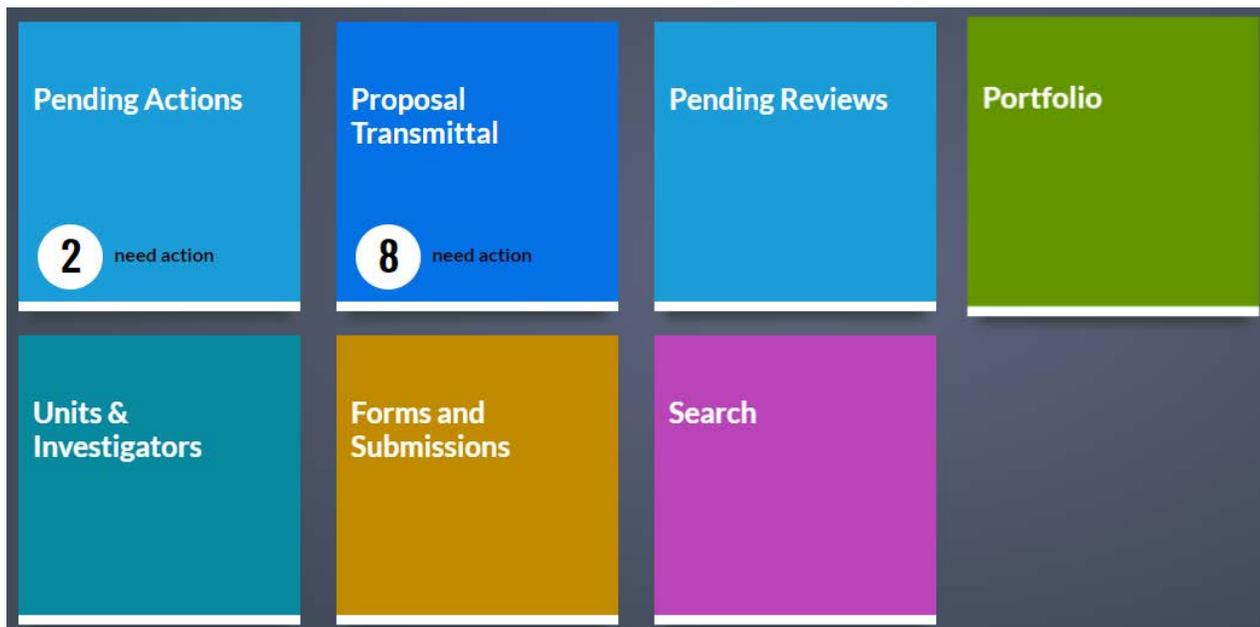I ⊙ ▲ | **UNIVERSITY OF ILLINOIS SYSTEM**

Navigating & Searching in myResearch Portal

Dashboard (Most users 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

myResearch Portal

Proposal Transmittals   Units & Investigators   Submissions   Search

1. Search

2. Criteria

Quick search   >

| Institution ID | Investigator | Lead Unit | Sponsor |

Enter Banner grant code, proposal, or award #

For additional criteria or to search multiple fields, try the advanced search option

Advanced

Subawards

2 Results

3. Results Count

5. Sort

| STATUS | LEAD UNIT | FUNDING | CAMPUS |
| Select | Select | Select | Select |

lead unit only ✕   in development ✕   pending ✕   active ✕   expired ✕

4. Filters

ORDER BY PROJECT

Start Date (newest)

1. Search – Click the Search button from the dashboard or Search link to open the Search screen

2. Criteria – Type in search criteria and hit Enter/click the magnifying glass or type in search criteria and select from the list, then hit Enter/click the magnifying glass.

- **Quick Search**
  - o Institution ID (Proposal, Agreement, or Subaward #) – Field that will search based on IP, Proposal Transmittal, Agreement, or Subaward #.
  - o Investigator – Name of the PI, Co-PI or Co-I.
  - o Lead Unit – Name of the lead unit on the project.
  - o Sponsor – Funding sponsor's name.
- **Advanced**
  - o Investigator – Name of the PI, Co-PI or Co-I.
  - o Lead Unit – Name of the lead unit on the project.
  - o Opportunity ID – ID of the funding opportunity announcement.
  - o Project Title – Title of the project.
  - o Sponsor – Funding sponsor's name.
  - o Sponsor # – ID number provided by the sponsor.
- **Subawards**
  - o Search by 5-digit subaward ID or subrecipient name.

3. Results Count – Number of project records returned.

4. Filters – Check items to limit the status of the results. By default, several items are already selected.

- **Status**
  - o In development
    - ➢ Proposals created in myProposals but not yet submitted to Central Office or submitted to Central Office but still under review.
  - o Pending
    - ➢ Proposals submitted and approved by Central Office, then submitted but not yet funded by sponsor.
    - ➢ Awards/Subawards that are under review by a negotiator or awards processor and pending approval and signature.
  - o Active
    - ➢ Proposals submitted and approved by Central Office and were awarded by sponsor.
    - ➢ Executed awards/contracts 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.
  - o Expired
    - ➢ Awards/Subawards 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.
  - o Closed/inactive
    - ➢ Awards/Subawards executed and/or accepted by the Board of Trustees and are now closed in Banner or if unfunded have expired/terminated.
    - ➢ Awards/Subawards submitted to Central Office but were administratively withdrawn by either the department, sponsor or Central Office prior to acceptance or full execution.
    - ➢ Proposals submitted and approved by Central Office and rejected or never funded by sponsor.
    - ➢ Proposals submitted and approved by Central Office and withdrawn from sponsor consideration at the department or sponsor's request.
- **Lead Unit**
  - o Lead unit only
- **Funding**
  - o Funded
  - o No-dollar
- **Campus** (you will only see those campuses for which you have access)
  - o UIUC
  - o UIC
  - o UIS
  - o System Office (U, C or S)

5. Sort (Order by Project)

- Start date (newest)
- Start date (oldest)
- End date
- Investigator

Results

1 **2** **4** **6**

● **Tamimie, Kamil**
Pending   651921367

5
Portal Test Project #4
#108565 - Award

National Science
Foundation
798-X531499-22

• • •

3
Mechanical Sci &
Engineering-U (1-917000)

6

● **Tamimie, Kamil**
Pending   651921367

Mechanical Sci &
Engineering-U (1-917000)

Portal Test Project #4
#108565 - Award

National Science
Foundation

⊗

7
Bachman, Bryan (COI)
Central Office Contact: Sarah
Hasib

8
Project Proposals and Subawards

9
11/01/2022 - 10/30/2026

$793,000

10
🔄 Mark as non-funded

💲 View financial details

⚙ Includes 1 subaward(s)

1. **Color-coded project status indicator**

2. **Name and UIN of the project Principal Investigator**

3. **Lead unit 3-digit name (6-digit org code)**

4. **Project Title**
   Most recent Institution ID

   Award stage - Institution award ID or Banner grant code
   Pending Proposal Stage - Institutional Proposal (IP) #
   Proposal Transmittal Stage - Proposal Transmittal (PD) #

5. **Sponsor Name** (direct sponsor)
   Sponsor ID # (if available)

6. **Expand/Collapse Button**

7. **Name(s) of additional project personnel (project role) Name of Central Office Contact assigned to project**

8. **Link to related projects section of the summary page**

9. **Period of Performance Start - End Dates**
   Project Funding Amount (Awards - Obligated Total Amount)

10. **Action Link Icons:**

    Mark as non-funded
    Click this button and a new email window will open (using your email client) with an auto-populated email message to the central office requesting that a proposal be marked as "non-funded"

    View financial details
    For awarded projects, click button to go directly to the award financial details page

    Includes _ subaward(s)
    Counts the number of subawards linked to a project. Click button to open a pop-up menu with a list of the project's subawards

Quick Search: Institution ID

Type any complete Institution ID number associated with a project and return on project record displaying information which reflects the most advanced phase of the project lifecycle. Click the magnifying glass or press 'Enter' to run the search.

Examples:
- **For an active award that has an assigned Banner Grant Code:**
    - Enter a Banner Grant Code, Award ID, Institutional Proposal (IP) #, or Proposal Transmittal (PD) #
- **For a pending award yet to be assigned a Banner Grant Code:**
    - Enter an Award ID, Institutional Proposal (IP) #, or Proposal Transmittal (PD) #
- **For a proposal that is pending with a sponsor:**
    - Enter an Institutional Proposal (IP) # or Proposal Transmittal (PD) #
- **For a proposal that is currently in development prior to submission to the central office:**
    - Enter a Proposal Transmittal (PD) #

**Quick Search:** Investigator
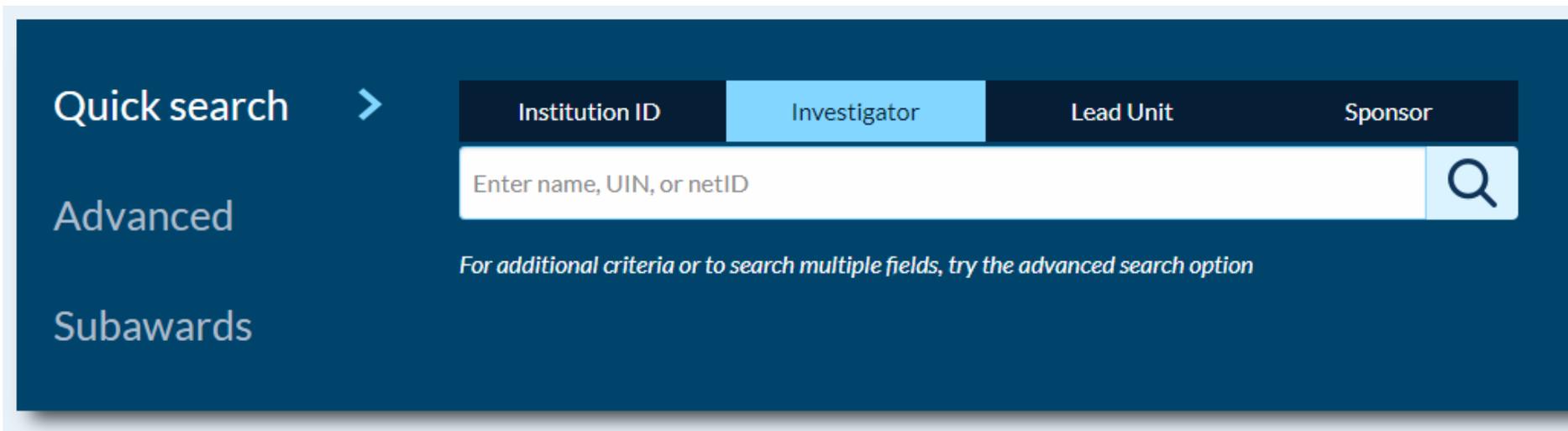
Type the name, UIN or NetID of an Investigator for whom you have permissions to view their portfolio. Select the correct name from the pick list and click the magnifying glass or press 'Enter' to run the search.

Notes:
- First names will **NOT** correctly populate the pick list. Must use last name, UIN or NetID.
- A name search will work as an automatic wildcard search - partial last names will begin to populate the pick list. No asterisk is required.
- Only accepts an Investigator's **complete** UIN or NetID.
- Includes results if the investigator's role is listed as PI, PI (Contact), Multiple PI, co-PI, or co-I. Searching by someone with a "Key Person" role on a project will **NOT** return results.
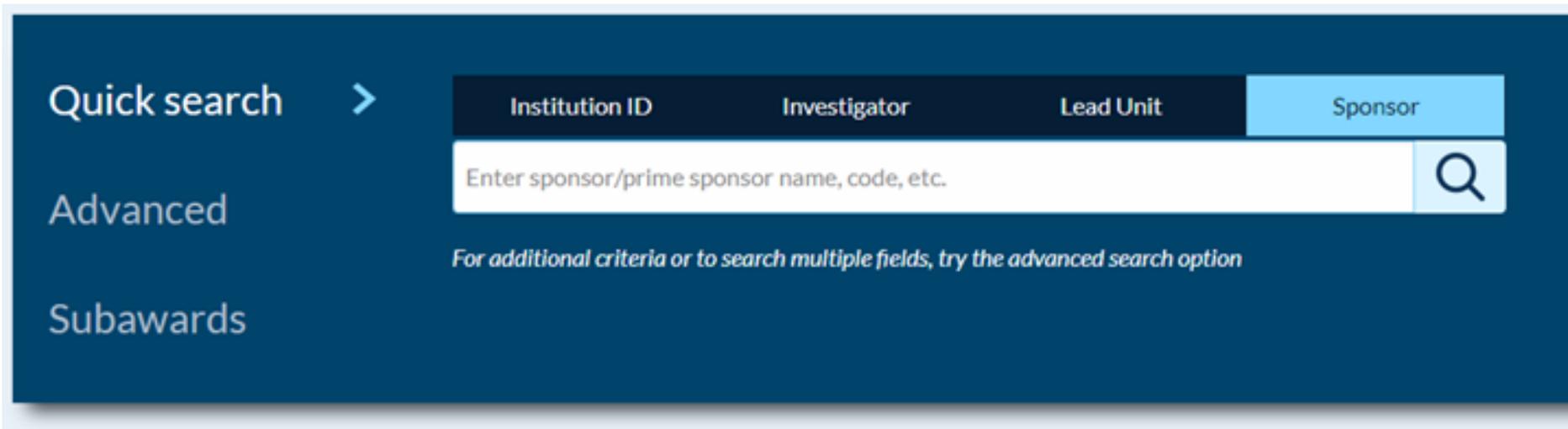
Quick Search: Lead Unit
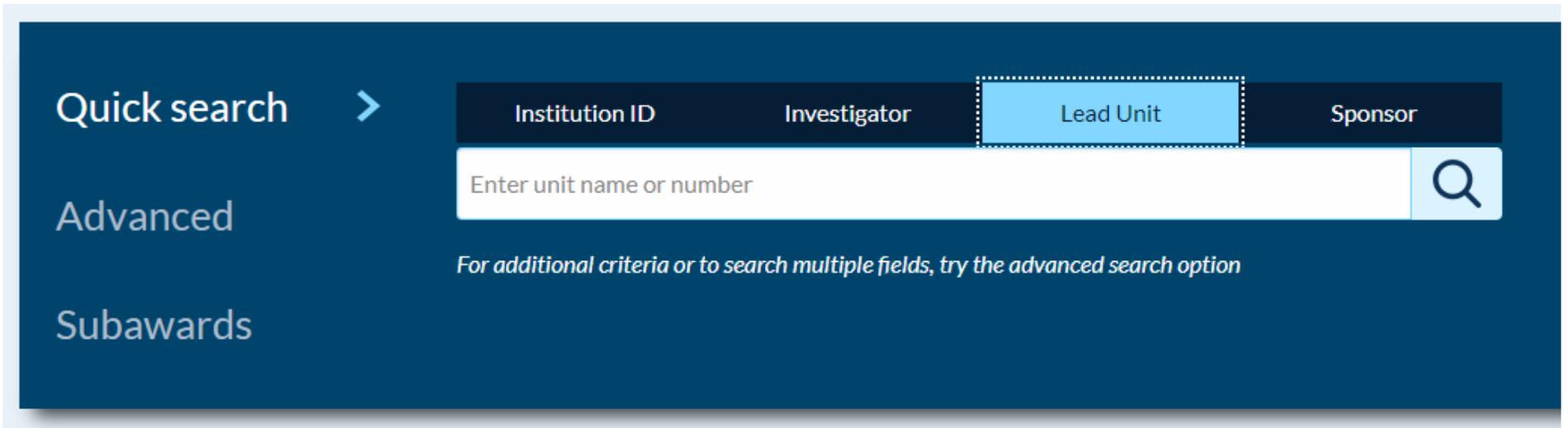
Type either a unit name or org code. Select the correct unit from the pick list and click the magnifying glass or press 'Enter' to run the search.

Notes:
- This field is an automatic wildcard search. It accepts partial entries for both unit name and org code with no asterisk required.
- Selecting a 3-digit org code from the pick list will return results from all 6-digit orgs beneath it in the unit hierarchy.
    - Example: Searching for "1-934" will return results for 1-934, 1-934000, 1-934001
- Lead Unit filter will not affect results since the initial search only looks at projects where the selected unit is listed as the lead.

Quick Search: Sponsor

Begin typing the name or acronym. Select the correct option from the pick list and click the magnifying glass or press 'Enter' to run the search.

Notes:
- This field is an automatic wildcard search. It accepts partial entries for both sponsor name and acronym with no asterisk required
- Notable sponsor acronyms are now included, but some are more effective than others. (e.g., must scroll to find NSF, but UCLA pops up immediately)
- For additional help locating a sponsor by name, click here.
- This field searches by both the Sponsor and Prime Sponsor, but only the direct sponsor will show in the results.
  Projects returned based on the Prime Sponsor will display with an asterisk:
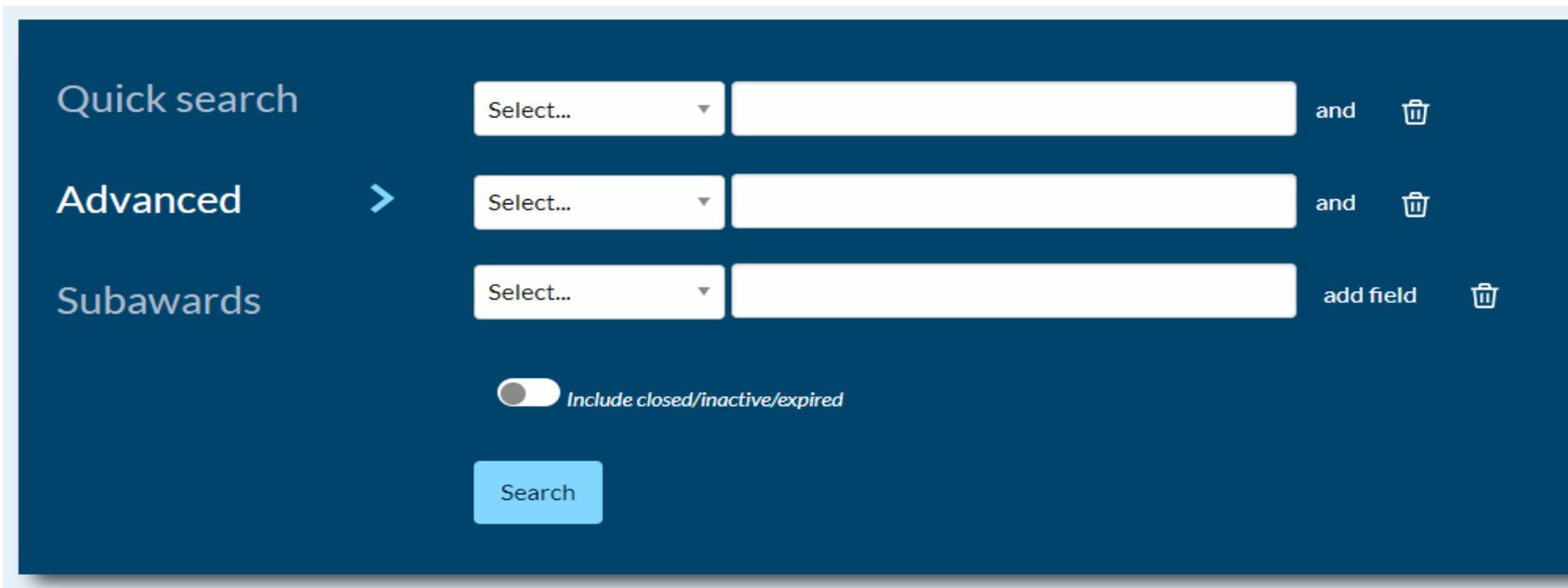

✳ Public Health Institute   ✳ Note: The sponsor you searched for may appear as a prime sponsor, not the direct sponsor. Those results are marked with a star next to the direct sponsor name.

Advanced Search: Search Criteria
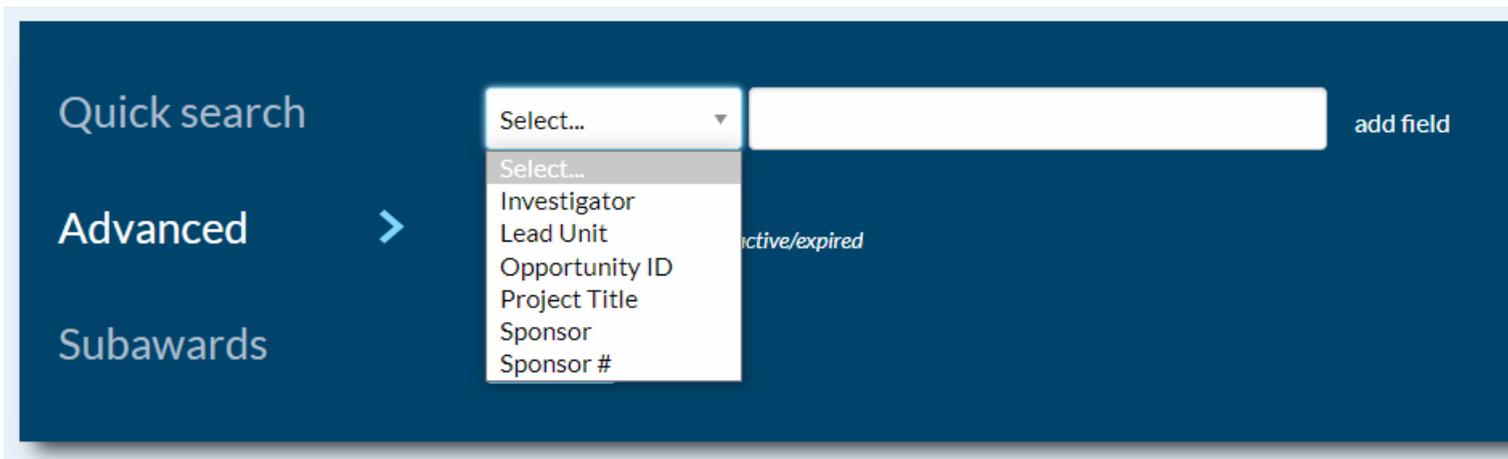
- **Investigator (same as quick search)**
- **Lead Unit (same as quick search)**
- **Sponsor (same as quick search)**
- **Opportunity ID**
    - Search for projects based on the ID of the funding opportunity announcement
    - Opportunity IDs are entered into an optional text field in myProposals, so results using this search field may be inconsistent
    - Not an automatic wildcard search—does not accept partial IDs
    - Tip: Try removing dashes, spaces, etc. from the ID number if your initial search is unsuccessful
    - Examples
        - PA-20-195
        - NSF 21-538
        - DE-FOA-0001820
        - HR001121S0034
        - Winter 2020 Pilot Award

- **Project Title**
    - This field is an automatic wildcard—type a partial word and you'll get results if available, no asterisks necessary
    - The more of the title you type, the more precise the search. Type only the word "and" and you may receive thousands of results. Enter too much of the title and you're susceptible to typos or differences in punctuation and spacing

- **Sponsor #**
    - Enter the ID number provided by the sponsor
    - This could be the sponsor's final proposal # or an award ID #
    - This is also an optional text field in myProposals, so formatting of the ID may not be exact
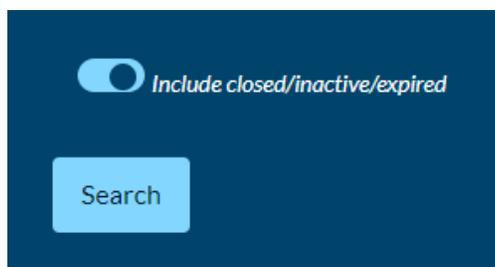
Advanced Search: Multiple Search Criteria

- Click 'add field' to create a new row (MAX of 6)
- In each row, select the search field from the drop-down and type appropriate information in the search box
  - Each additional parameter uses an "and" statement—in other words, it narrows your results
- Click the Trash icon [🗑] in order to remove the row.

Closed/Inactive/Expired Slider
- Toggle the slider to determine whether your search results will include closed awards, expired projects (awarded projects that are past the project end date but not yet marked "closed"), and inactive projects (projects that have been voided or withdrawn plus declined proposals).
- The statuses can be more finely adjusted using the status filter once the search has run. The default search includes only in-development, pending, and active projects.

Subawards
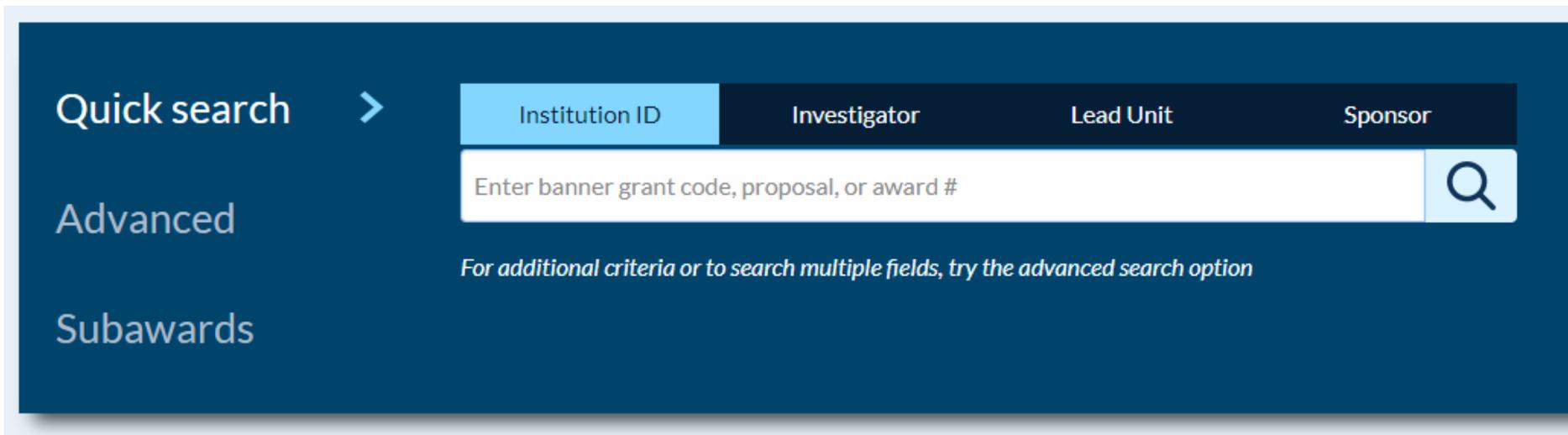
- Type either a subrecipient name or the 5-digit institutional subaward ID in the search field and click the magnifying glass or press 'Enter' to run the search.
- The Project result card will show the subrecipient name, but the title and award number of the prime award
- This field accepts partial subrecipient names, but will not produce a pick list to choose from
  - Example: typing "florida" will display results for:
    - ➢ Florida International University
    - ➢ Florida State University
    - ➢ Lutheran Services Florida
    - ➢ University of Florida
    - ➢ University of Southern Florida
- The ID number must be 5 digits long
- Searching by ID number will bring back a precise record, while a subrecipient search brings back all records with that recipient, including some you may not have access to view
- The project's result will show the subrecipient name but the title and award number of the prime award