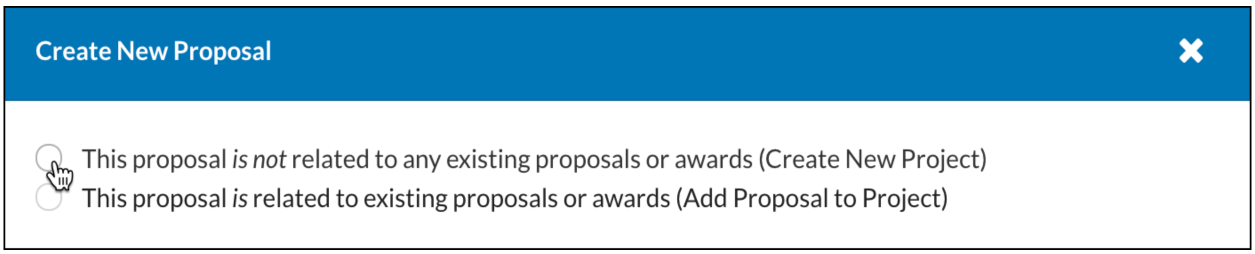
If you use the new Sponsored Projects platform primarily as a PI or researcher, you can easily create a new proposal from the dashboard.

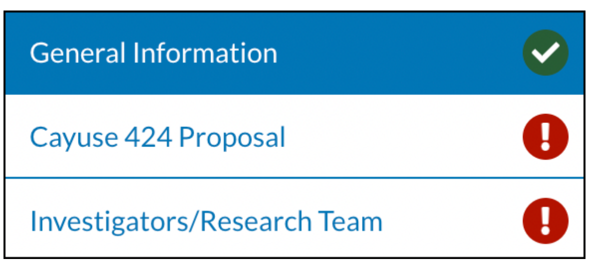
Creating a Proposal

1. From the **Sponsored Projects** dashboard, click on **Start New Proposal**.

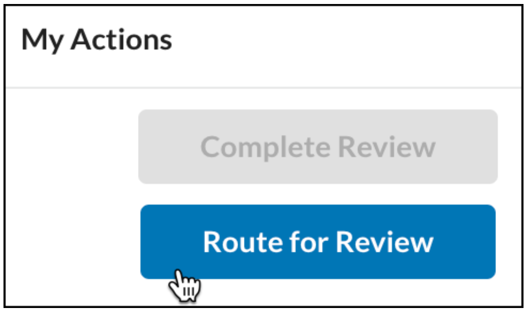
2. Select the type of proposal you would like to create. If you are creating a new proposal, enter a title for your project and click on **Create New Project**. If your proposal is related to an existing project, select the name of the existing project. Click on **Add New Proposal to Project**.



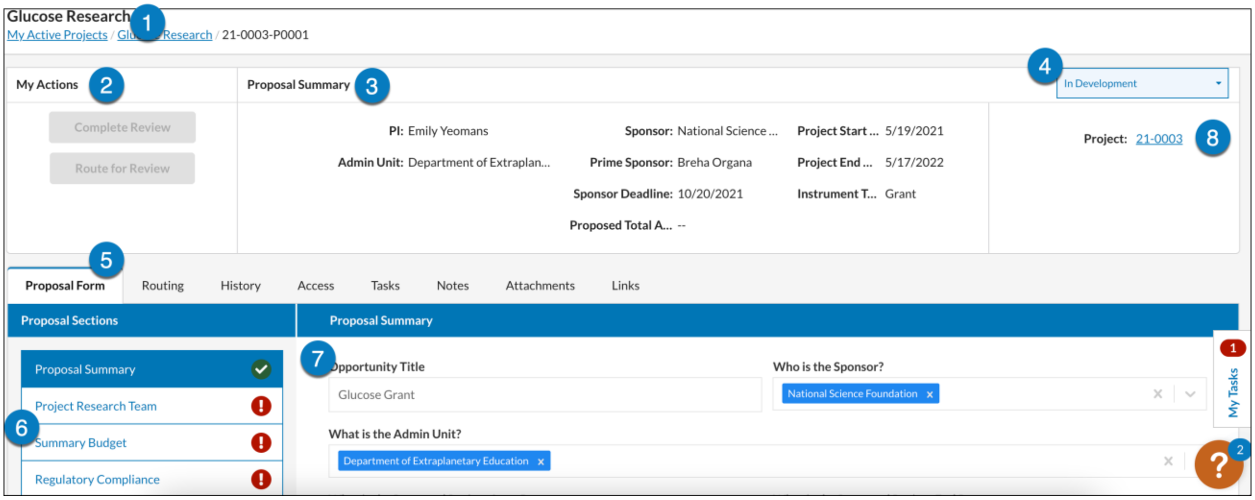
3. You will be directed to the new proposal for completion. Each **Section** of the **Proposal Form** will display a red exclamation point. Once completed, the section will display a green check mark.



4. Once all sections display a green check mark, you will have the option to **Route for Review**.



The Proposal Interface



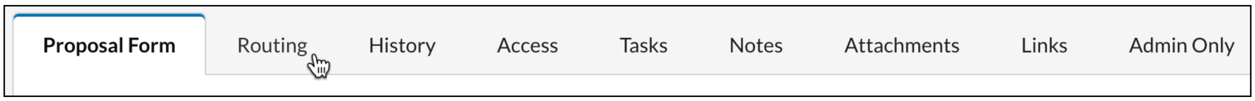
1. **Project Name:** This section also contains breadcrumbs back to the proposal's project, as well as the user's active projects.
2. **My Actions:** The **Route for Review** button will activate once each section beneath Proposal Sections has a green check mark. If the user has permissions to complete the review, the **Complete Review** button will activate once routing has finished.
3. **Proposal Summary**: This section will provide at-a-glance information, such as Sponsor, Deadlines, and Proposed Amount. The fields will remain blank until established at a project or proposal level.
4. **Status**: The status flag lets users know what phase the proposal is in: In Development, Under Review, Approved, Submitted to Sponsor, Under Consideration, Funded, and Closed.
5. **Proposal Tabs**: The proposal tabs provide additional information, and let you add additional assets to your proposal (see the Proposal Tabs section below for more information).
6. **Proposal Sections**: The proposal sections are configured through the Form Manager by a System Administrator. All sections must have a checkmark in order

to route the proposal for review. An exclamation mark means that the section contains a required field that hasn't yet been completed.

7. **Proposal Form:** The form is where users fill out their proposal information, and is configured through the Form Manager by a System Administrator.
8. **Connected Link:** Links to any connected project.

Additional Tabs

Proposal Forms include additional tabs that are optional to complete You may fill in the information in the tabs at any time.



- **Routing:** Administrators must configure **Routing Rules** prior to any user creating a new proposal. Information about the review process will display in this tab once routing has begun.
- **History:** View proposal status and history. Proposal status can also be viewed from the new Sponsored Projects dashboard.
- **Access:** Manage who can view or edit the proposal.
- **Tasks:** View open tasks relating to the proposal.
- **Notes:** Add comments to the proposal for reference.
- **Attachments:** Upload files relevant to the proposal.
- **Links:** Displays data from records in connected systems (Developer to set up).
- **Admin Only:** Add notes and attachments that are only visible to other Administrators (*tab only visible to SP System and SP Proposal Administrators*).