Workspace Navigation

1. **Project / Record Number and Type**
   Refer to the type to make sure you are on the correct workspace.
   - **FP** = Funding Proposal
   - **BU** = Budget
   - **AWD** = Award

2. **Current State of the Record**
   Examples of states include:
   - **Draft**: Proposals and awards that are currently being drafted.
   - **Department Review**: Proposals that have been submitted and are awaiting assignment to an OSP specialist.
   - **Changes Requested**: Proposals that have been returned to the PI / DRA for edits.
   - **Pending Sponsor Review**: Proposals that have been submitted to the sponsor.

3. **Workflow Diagram**
   A visual representation of where a record currently sits in the workflow.

4. **Activities**
   Actions that can be taken on a given record.
Glossary

Activities
Actions that can be taken by a user on a given record. The list of available activities is on the left-hand side of each record below the current state and will depend on 1) the project’s current state and 2) the role(s) you’ve been granted as an end user. Some activities advance records through the workflow, while others check compliance information or send notifications.

Administrative Contact
The primary departmental/end user contact identified on each proposal and award available. Administrative contacts are selected by end users but can be updated by central staff as needed, based on the constituency list.

Dashboard
The landing page when first logging into UTRMS; a starting point for creating or (especially for central staff) finding items. The My Inbox tab in the dashboard lists items requiring your action. The left-hand sidebar lists recently viewed items and approaching deadlines, if applicable.

Help Text
Guidance / additional context found throughout UTRMS by clicking on the circled question marks.

History Tab
Located at the bottom of a workspace, the history tab shows all activities performed on a given project, including the name of the user who performed the activity and a timestamp.

ILM (In-Line Manual)
A robust help tool overlaying the base UTRMS software, used to generate the welcome pop-up, modify and enhance help text, and provide interactive walkthroughs (access via the “Get Help” button at the top center of the screen).

Module
Each component of UTRMS is a separate module: Agreements, COI, Grants, IACUC, and IRB.

SmartForm
Online forms that contain questions to collect demographic and budgetary information for the submission. They are called “Smart” forms because they are dynamic. Pages of the form will adjust based on information you’ve already entered. For example, if you answer “Yes” to the question “Will this application be submitted system-to-system?” on a Submission Information page, a Funding Opportunity Announcement page will be added to your proposal’s SmartForm.
Specialist
The identified central office contact on proposal (FP) award (AWD) records.

State
The current status of a record, highlighted in gold in the upper left corner and in the workflow diagram bubbles.

Wildcard Character
When completing SmartForms, you will need to search for people or organizations to answer some questions. Use the wildcard operator % to broaden your searches.

Using % on both ends of your search term will yield the most results. For example, searching for “defense%” will yield all organizations that begin with the word defense. Searching for “%defense%” will yield all organizations containing the word defense anywhere in their name.

Workflow Diagram
Also known as “the bubbles,” the workflow diagram is a visual representation of a record as it moves through states, for example, as a proposal moves from Draft to Pending Sponsor Review. Found in most workspaces, the highlighted state will update as records advance through the lifecycle.

Workspace
Each record (funding proposal, budget, SF424, award, modification, agreement, etc.) has its own workspace. Each contains a record ID, summary of information, workflow diagram, activities to be taken, and tabs of relevant details: history, reviewers, etc.

Please note: the concept of a “workspace” in UTRMS is unrelated to Grants.gov Workspace.