

**UFIRST** | University of Florida  
Integrated Research Support Tool

## **RSH279: UFIRST INTRODUCTION**





The University of Florida Integrated Research Support Tool (UFIRST) is the proposal, award and agreement management system used at UF.

UFIRST can be accessed via this website:  
<http://grants.research.ufl.edu>

This course serves as the introduction to the UFIRST system and is the first of the UFIRST course series. To learn more about the UFIRST series, click [Sponsored Programs Course Catalog](#).

By the end of this course, you will be able to:

- Locate and edit your profile information
- Define and locate security roles
- Successfully navigate the system
- Locate records and relevant data

To pass this course, you must obtain at least 80% on the final assessment.

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For questions -  
Email: [UFIRST@research.ufl.edu](mailto:UFIRST@research.ufl.edu)  
Phone: 352-392-9267  
Website:  
<https://research.ufl.edu/ufirst.html>

Resources:

[Grants Toolkit](#)

[UFIRST site](#)



# Chapter 1

## What is UFIRST? & Editing Profile Information

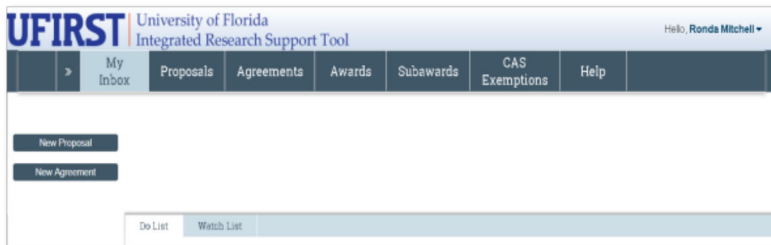


UFIRST is the University's system for approving and tracking all sponsored project and research proposals, agreements and awards.

Data in UFIRST is stored securely and is visible only to parties with a business purpose to access the data.

UFIRST functions include:

Collecting institutional proposal data	Routing proposals for chair, director and dean approvals prior to submission to sponsors
Submitting Federal grant applications via the SF424 electronically to grants.gov	Collecting sponsored and research-related agreement information
Tracking negotiations on all sponsored and research-related agreements	Collected institutional award data
Hosting Notices of Awards (NOAs)	Facilitating tracking of award management requests such as prior approvals







Every employee at UF has access to UFIRST and can login using their Gatorlink credentials. Within UFIRST you have a profile that includes Human Resource and SF 424 Submission information.

Your profile information determines what you can see and do within UFIRST.

**To view your profile:**

1. Log into UFIRST
2. Click your name located in the upper, right corner
3. Choose My Profile

**UFIRST** | University of Florida  
Integrated Research Support Tool

My Inbox | Proposals | Agreements | Awards | Subawards | CAS Exemptions | Help

Hello, [Ronda Mitchell](#) ▾

- My Profile
- Logoff





It's important that you review your profile information to confirm it's accurate and displays professionally.

Most of the data in the HR and SF 424 sections are populated from myUFL.

### Changes to the HR information CANNOT be made within UFIRST.

Your name, title, phone and email come from your directory profile in myUFL. To change them, login to myUFL and navigate to Main Menu > My Account > Update My Directory Profile.

Your employer, salary, fringe benefit, FTE, and appointment are all based on your primary UF job.

If any of this is incorrect, contact your local HR person.

#### HR Information

**First**

Ronda

**Middle:**

Clemons

**Last:**

Mitchell

**Title:**

Instructional Designer III

**Annualized Salary:****Fringe Benefit Category:**

Exempt TEAMS/USPS

**FTE:**

1

**Appointment:**

12 Month

**Employer:**

HR-TRAINING-DEVELOPMENT

**Phone:**

352/273-1756

**Email:**

rmitchell@ufl.edu

**Created:**Friday, March 13, 2015 11:32:26 PM

**Modified:**Monday, October 22, 2018 5:37:02 PM

**Active:** Yes

**Is PI eligible:** No

**Roles:**

Registered User

Study Staff



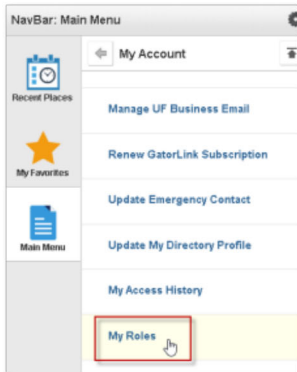


All security roles are maintained in the ARS, the University's electronic Access Request System.

## Access Request System

If you don't have the appropriate roles, contact your Department Security Administrator (DSA) to request them.

If you are unsure who your DSA is, you can access a list of current DSAs in myUFL under Main Menu > My Account > My Roles.



### My Roles

UFID: 41839908

GatorLink Username: rmitcheil

Name: Mitchell,Ronda Clemons

Access to the myUFL portal and university systems is based on the roles you are assigned. Roles determine what appears in the myUFL Menu, including what appears in your "My Self Service" folder.

Roles are assigned by your college or department. If you do not have a role you think you should have, please contact your Department Security Administrator using the following link:

[Department Security Administrator List](#)

You have the roles shown below:

Role Name	Description
UF_CS_USER	Universal role that allows user to sign-on
UF_EL_TRAINING_ADMIN	This is a core office role granting access within the Enterprise Learning module to: * Correct courses and person profiles * Update program information * Update training resources * Update result tracking * Update student enrollments * Update content catalog * Run training reports
UF_EMS_ALL_FACULTY_STAFF	This role provides university faculty and staff with access to the EMS Room Scheduling System to request and reserve space for events. The role is automatically assigned and can't be requested via the Access Request System (ARS).
UF_ENTITLE_FERPA	This role is automatically assigned to users who have completed University of Florida FERPA training and will be removed when their FERPA training expires.
UF_ENTITLE_SSN-PII	This role is automatically assigned to users who have completed University of Florida training about protecting SSNs and other Personally Identifiable Information (PII) and will be removed when such training expires.
UF_ER_HRPR_ACCOMPLISHMENTS	This is an end user role available to authorized training personnel who require access to protected compliance training data. This is a restricted role requiring approval by HR.
UF_ER_PA_APPLICATION_ACCESS	Contains information regarding the assignment of PeopleSoft Security Roles
	This is an end user role available to Human Resource Services OFFICE only. It allows





The Division of Sponsored Programs (DSP) recognizes that for many reasons, you may want the way your name, title and other personal information displays on application forms to differ from your HR profile. The data in the SF 424 section of your profile will appear on SF 424 proposal forms created through UFIRST SF 424.

## SF 424 data CAN be edited in UFIRST.

To change any data in the SF 424 section, simply enter the correct information in the appropriate fields.

Be sure these data are accurate and professional in appearance.

SF 424 Submission Information	Business Address:
Application Honorific: <input type="text"/>	Street/PO Box: <input type="text" value="207 Grinter Hall"/> <input type="text" value="Box 115500"/>
Application First Name: <input type="text" value="Ronda"/>	City: <input type="text" value="Gainesville"/>
Application Middle Name: <input type="text" value="Clemons"/>	County: <input type="text"/>
Application Last Name: <input type="text" value="Mitchell"/>	State/Province: <input type="text" value="FL"/>
Application Suffix: <input type="text"/>	Zip/Postal: <input type="text" value="32611-5500"/>





## SF 424 Profile Delegation

You can delegate management of your SF 424 profile section to any other UF employee.

To do so, at the bottom of the page, simply type the last name of the individual to whom you want to delegate in the Profile Delegates field and select the desired person from the list.

**Profile Delegates:**

Hartman

Last Name	First Name	Organization	Dept ID	Title
Hartman	Crystal	AG-SCHL-FOREST RES / CONSERV	60460000	Biological Scientist II
Hartman	Darlene	AG-EREC-BELLE GLADE	60740000	Agricultural Assistant III
Hartman	Gary	AG-EREC-BELLE GLADE	60740000	Maintenance Generalist II
Hartman	Jacqueline	AG-SCHL-FOREST RES / CONSERV	60460000	OPS-Spons Prjs Non-Clerical
Hartman	Kathleen	AG-SCHL-FOREST RES / CONSERV	60460000	CO AST PROF
Hartman	Kathryn	AG-YOUTH,FAMILIES& COMMUNITIES	60330000	Administrative Spec III
Hartman	Marissa	HR-TRAINING-DEVELOPMENT	62010700	Human Resources Assistant
Hartman	Paige	SA-RECREATIONAL SPORTS	04020000	STU AST - NON-CLERICAL & A
Hartmann	Anath	CJC-GRADUATE STUDIES / RESEARC	23010200	ACADEMIC LUMP SUM PAYMENT
Hartmann	Arik	AG-WILDLIFE ECOLOGY / CONSERV	60470000	OPS-Spons Prjs Non-Clerical





For more advanced searching, click the Ellipsis icon to open a separate window where you can filter by parameters other than last name.

Examples of other parameters include First Name, Organization, Dept ID, or Title.

Click the Advanced link to filter search results by multiple search parameters. Such as, filtering by Last Name *and* Organization.

Click the button below to see a demo of searching for SF 424 delegates.

UFIRST Search Demo

**Profile Delegates:**

Hartman

⋮

Last Name First Name Organization

Select One or More Persons

Filter by: Last Name [ ] Go Clear **Advanced**

Display All

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	Last Name	First Name	Organization	Dept ID	Title
<input type="checkbox"/>	Aadland	Kelsey	AG-MICROBIOLOGY / CELL SCI	60100000	GRADUATE AST-R
<input type="checkbox"/>	Aagard	Tammy	EM-ENROLLMENT MANAGEMENT ADMIN	03010000	ASSOCIATE VICE PRESIDENT
<input type="checkbox"/>	Aalaei Andabili	Seyed	MD-MED CENTRAL-HOUSESTAFF	29050102	RESIDENT
<input type="checkbox"/>	Aamodt	David	HP-SLP LANG & HEARING SCI	33060000	OPS-Spons Prjs Non-Clerical
<input type="checkbox"/>	Aaron	Allene	DN-PATIENT ACCOUNTING	34010603	OFFICE MGR
<input type="checkbox"/>	Aaron	Jessica	LS-SPANISH/PORTUGUESE STUDIES	16880000	ASO PROF
<input type="checkbox"/>	Aaronson	Kelly	MD-PEDS-PULMONARY	29092000	FL WORKS EXPERIENCE
<input type="checkbox"/>	Aaronson	Patrick	JX-EMERGENCY MEDICINE-JAX	30290000	CO AST PROF
<input type="checkbox"/>	Abadal	Grant	MD-RADIOLOGY	29130000	RESIDENT
<input type="checkbox"/>	Abakar Basher	Abdalgani	JX-MEDICINE AT JAX	30050000	CLIN AST PROF
<input type="checkbox"/>	Abarriche	Dahomey	HP-CLINICAL / HLTH PSYCHOLOGY	33070000	CO CLIN AST PROF
<input type="checkbox"/>	Abarca	Jamie	MD-MEDICINE-ADMINISTRATION	29050100	Business Admin Specialist I
<input type="checkbox"/>	Abbas	Syed	JX-SURGERY-JACKSONVILLE	30140000	ADV CLIN POSTDOC ASO
<input type="checkbox"/>	Abbate	Jessica	PH-CENTER QUALITY MEDICINE MOT	32060500	OPS - Contract Services
<input type="checkbox"/>	Abbey	Craig	PV-THE CENTER (LOMBARD)	02130000	OPS Exempt
<input type="checkbox"/>	Abbott	John	EO-MECHANICAL / AEROSPACE ENG	19020000	SR LECTURER
<input type="checkbox"/>	Abbott	Patricia	MD-RADIOLOGY	29130000	PROF

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OK Cancel





# Remember!

The information in the HR section is coming directly from myUFL, not UFIRST.

If something is wrong, it must be corrected in myUFL. Edit in myUFL via Main Menu > My Account > Update My Directory Profile or contact your local HR person.

## HR Information

**First**  
Ronda  
**Middle:**  
Clemmons  
**Last:**  
Mitchell  
**Title:**  
Instructional Designer III

## Annualized Salary:

**Fringe Benefit Category:**  
Exempt TEAMS/USPS  
**FTE:**  
1  
**Appointment:**  
12 Month

**Employer:**  
HR-TRAINING-DEVELOPMENT  
**Phone:**  
352/273-1756  
**Email:**  
rmitchell@ufl.edu

**Created:**Friday, March 13, 2015 11:32:26 PM  
**Modified:**Monday, October 22, 2018 5:37:02 PM  
**Active:** Yes  
**Is PI eligible:** No

**Roles:**  
Registered User  
Study Staff



# Chapter 2

## Security Roles & Affiliations



All employees are able to access UFIRST and create proposals or agreements to route for approval.

To do anything broader in support of a department or PI, you must have the appropriate security roles and affiliations.

UFIRST security roles are requested by your DSA.



After you have the appropriate security role, your UFIRST Grant Workflow Administrator (GWA) affiliates you with the appropriate departments in UFIRST.

[Click for a detailed list of UFIRST security roles](#)





## UFIRST Security Roles

**Study Staff & Registered User** - these roles are automatically assigned to all UF employees and are all that most faculty and research staff need. These roles allow base level access into UFIRST to create, view and edit UFIRST records that you have:

- created yourself
- been identified as primary admin contact
- been listed as a key person
- been invited to view or edit records
- been assigned as an Ad Hoc approver

Required Training: None

**Grant Workflow Administrator (GWA)** - Individuals with this role affiliate Grant Administrators and Grant Approvers to their appropriate division, department, college or center/institute in UFIRST. Each college typically only has one or two GWAs who are chosen by DSP in conjunction with the leadership of each college.

A list of GWAs can be found [here](#).

myUFL Security Role: UF\_N\_GM\_WORKFLOW\_ADMINISTRATOR

Required Training: None





## UFIRST Security Roles

**Grant Administrator** -This role is typically granted for department or college Research Administrators, Grant Specialists, Coordinators, Fiscal Specialists or their equivalent, Office Managers, Program Managers, etc. who have a responsibility for an entire unit (division, department, college, shared service center, etc.).

With this role, you can view and edit records in UFIRST that include personnel in your department or college (collectively referred to as units). As this role depends on you being affiliated with a particular department or college, you must be affiliated by your GWA.

myUFL Security Role: UF\_GM\_Proposals

### Required Training:

RSH220  
RSH230  
RSH260

### Recommended Training:

RSH279  
RSH280  
RSH281  
RSH282





## UFIRST Security Roles

**Grant Approver** - As UFIRST is used to approve sponsored proposals, each college or division must decide at what level within their unit they will assign approval responsibilities.

Each proposal requires only one unit approval, but internally, units can decide to have up to four (i.e. Division, Department, Administrative Review, College Review). Once such a decision is made, every individual within the unit with authority must have this role to approve proposals.

Typically only chairs, directors, deans or their approved delegates have this role. We strongly recommend back up in each unit in order to ensure that when the primary approver is unavailable, the proposal does not stop moving forward.

myUFL Security Role: UF\_N\_GM\_Grants\_Approver

Required Training: None

Recommended Training:

RSH279

RSH220

RSH230

RSH260





## UFIRST Security Roles

**Unit Fiscal Authority (UFA)** - Within the Approver set for each unit is a special approver titled the Unit Fiscal Authority. Individuals with this role approve cost share in proposals or advanced spending authority (temps) for their division, department or college. As with the Grants Approver, they are linked to the appropriate unit by their GWA.

myUFL Security Role: UF\_N\_GM\_Grants\_Approver

Required Training: None

Recommended Training:

RSH279

RSH220

RSH230

RSH260

**Additional Viewer** - Units can add personnel who have Read Only access across all modules (Proposals, Awards, Agreements, Subawards, CAS Exemptions).

You must be linked to a division, department or college by your GWA to see any records. Any person with Study Staff can be made an Additional Viewer in UFIRST without any ARS roles.





To check what roles you have in UFIRST, view the HR information of your UFIRST profile.

In this example, this person has the Registered User and Study Staff roles.

HR Information	
<b>First:</b> Ronda	<b>Employer:</b> HR-TRAINING-DEVELOPMENT
<b>Middle:</b> Clemons	<b>Phone:</b> 352/273-1756
<b>Last:</b> Mitchell	<b>Email:</b> rmitchell@ufl.edu
<b>Title:</b> Instructional Designer III	<b>Created:</b> Friday, March 13, 2015 11:32:26 PM
<b>Annualized Salary:</b>	<b>Modified:</b> Monday, October 22, 2018 5:37:02 PM
<b>Fringe Benefit Category:</b> Exempt TEAMS/USPS	<b>Active:</b> Yes
<b>FTE:</b> 1	<b>Is P-eligible:</b> No
<b>Appointment:</b> 12 Month	<b>Roles:</b> Registered User Study Staff

If you notice something wrong with your assigned roles, contact your DSA. If you have the right roles but don't believe you are seeing all the records you should contact your GWA.



# Chapter 3

## UFIRST Navigation

## INBOX

Once logged into UFIRST, you will see the Navigation bar at the top of the window. The Navigation bar allows you to move from module to module within UFIRST quickly. By default, you will land on My Inbox.



The Inbox displays a list of items that need your attention or that are in the state that needs some tracking or follow up.

There are seven sections in the Inbox, one for each module in UFIRST.

- Proposals
- Agreements
- Awards
- Award Modifications
- Fund 214s (Non Federal Clinical Trial Awards)
- Subawards
- CAS Exemptions



Each section has a Do List and a Watch list.



The **Do List** are records that require you to act before any further processing can occur.

The **Watch List** provides records for which we believe you need quick access. These include records on which you are the Primary Contact but you have completed your entry and routed for further processing. They are not submitted (in the case of proposals) or executed (in the case of agreements and subawards), but they are not currently awaiting your action.

## NAVIGATION BAR

My Inbox	Proposals	Agreements	Awards	Subawards	CAS Exemptions	Help
-------------	-----------	------------	--------	-----------	-------------------	------

The Navigation bar will display tabs that allow you to access the different modules in UFIRST.

Proposals	Packages of informational materials, comprised primarily in digital form, submitted in response to Request for Proposals (RFPs) from sponsors.
Agreements	Commitments between UF units and external parties that include the use or exchange of UF resources in support of research or any other type of sponsored activities. Agreements may or may not be linked proposals.
Awards	Proposals that have been accepted by sponsors and NOAs have been received.
Subawards	Funding provided by UF units to subrecipients for the purpose of carrying out programmatic segments of sponsored projects.
CAS Exemptions	Requested exemptions from Cost Accounting Standards.



## WORKLIST

When you select any module from the Navigation bar, you will land on the All records worklist within that module.

You will only see records within that module that you have security to see.

Your security is driven by your role (all records in your unit if you are a Grant Administrator) and data within the specific records (i.e, if you are the primary unit contact listed on the record).

Proposals							
All Proposals							
Pre Submission							
Post Submission							
Awarded							
424 Applications							
Filter by ?							
ID							
Enter text to search for							
+ Add Filter							
ID	Name	Smart Form	Date Modified	State	PI	Sponsor	De
PRO00025718	Stats	SmartForm	5/24/2019 10:17 AM	Draft	Daniels	NATL INST OF HLTH	6/5
PRO00025721	_FundingProposal - 5/23/2019 8:47:55 PM	SmartForm	5/23/2019 4:48 PM	Draft	Snowden	NATL SCIENCE FOU	
PRO00025693	ECMO Test 2	SmartForm	5/23/2019 1:24 PM	Cost Share Review	Pearson	NATL INST OF HLTH	



## WORKLIST TABS

Each worklist includes subsets of records grouped into lists by a higher level of workflow, such as Pre-Submission, In Progress or Active Awards.

### Proposals

All Proposals

Pre Submission

Post Submission

Awarded

424 Applications

### Agreements

All Agreements

In Progress

Executed Agreements

### Awards

All Awards

Awards In Progress

Active Awards



On certain modules you may notice an ellipsis at the end of the worklist tabs. This indicates there are more lists available to view.

In the below example when we click on the ellipsis within the Agreements module, we can now see Legacy Agreements.



## HELP

The Help Navigation button will display additional UFIRST resources, contact information and training requirements.

»	My Inbox	Proposals	Agreements	Awards	Subawards	CAS Exemptions	Help
---	-------------	-----------	------------	--------	-----------	-------------------	------

### UFIRST Help

Links for obtaining assistance using this application

- UFIRST Manual coming soon
- UFIRST Toolkits
- UFIRST Training Course
- Grant Workflow Administrators - Key UFIRST contacts for each major unit
- Other Sponsored Programs Training Courses

**If you still have questions, please contact:**

352.392.9267

-or-

[ufirst@research.ufl.edu](mailto:ufirst@research.ufl.edu)

Or visit: <http://research.ufl.edu/faculty-and-staff/initiatives/ufirst.html>

**The unit responsible for maintaining the content of this application:**

University of Florida

Office of Research- Division of Sponsored Programs

219 Grinter Hall

Gainesville, Florida 32611



## WORKSPACE

Click on the title or ID of an item listed in your Inbox to open that item's workspace. An item's workspace is the "command center" and the starting point for all activities. In this example, we selected a proposal's title from the Inbox and were taken directly to that proposal's workspace.

A record's workspace contains a lot of information.

Click each letter to learn more about each area on a workspace.

**A** Effects of ballroom dance on psychological well-being of women over 50 PRO00023782 Funding Proposal

The PI has not yet certified this proposal.

**B** Draft

**C** SmartForm ▼  
Edit Proposal SmartForm  
Access Budget Workspace

**D** Create...  
New Agreement

**E** Summary Key Personnel Budget Summary Cost Share Summary ...

**F**

Proposal Information	Budget Information	Primary Unit Contact
Principal Investigator: Ronda Mitchell	Project Period: 6/3/2019-6/2/2024	Name: Email: Phone:
Submitting Department: HR-TRAINING-DEVELOPMENT	Number of Periods: 5	<b>DSP Contact</b> Name: Email: Phone:
Submitting Department ID: 62010700	Total Direct: \$0	<b>Compliance Information</b> Human Subjects: Animal Subjects:
Sponsor: NATL INST OF HLTH	Total Indirect: \$0	
Prime Sponsor:	Total: \$0	
Deadline: 5/3/2019	<b>Cost Sharing Information</b> Cost Sharing Direct: \$0 Cost Sharing Indirect: \$0 Cost Sharing Total: \$0 Cost Sharing Type:	
Opportunity Limited?: Opportunity ID		
Opportunity Name		
<b>Additional Commitments</b>		



## SMARTFORMS

SmartForms are where you view/enter/edit the details of proposals, agreements, awards, subawards and CAS exemptions.

In this example, you see the first section of a proposal SmartForm.

1.0 General Information	
Use "N" as wild card search.	
<div>1.0</div> <div><b>* Principal Investigator / Program Director / Fellow:</b> Ronda Mitchell <input type="text"/></div> <div><b>Identify the Mentor / Responsible Faculty Member:</b> <input type="text"/></div> <div><b>If Sponsor requires FCOI Disclosure, attach form DSP-5 : [None]</b> <input type="button" value="Upload"/></div>	<div>Only use the Mentor field for fellowships, training grants, dissertation awards or similar student augmentation awards where a student or post-doc must be listed as PI on the application.</div> <div>For multi-PI applications, select the contact PI.</div> <div>The Contact PI will be responsible for relaying communications between all of the PIs, University Officials and the Sponsor, where appropriate.</div> <div><a href="#">DSP-5 form</a></div>
<div>2.0</div> <div><b>* Submitting Department:</b> HR-TRAINING-DEVELOPMENT <input type="text"/></div> <div><b>Submitting Department ID:</b> 62010700</div>	<div>The Submitting Department will determine the workflow approval path.</div>
<div>3.0</div> <div><b>Primary Unit Administrative Contact:</b> <input type="text"/></div>	<div>Individual available to answer questions about the submission.</div>
<div>4.0</div> <div><b>* Short Title of Proposal:</b> <input type="text"/></div>	<div>Displayed throughout SmartForm and</div>

Simply complete the presented fields with the relevant data. If you are confused by what a field is asking for, there is help text and links available to the right of each question.







All SmartForms are dynamic, meaning the choices you make on the form will determine the further questions presented. For example, if you say no to involvement of human subjects, you will not be asked further questions regarding the identification of related data. If you say you are not traveling internationally, you will not be asked further questions about the duration and location of that travel.

Each page within a SmartForm is indicated by a number and description.

For example,  
1.0 General Information,  
1.2 Other Grant Program Information, 2.2 Personnel.

Then within that page are questions to be answered also indicated by numbers, such as 1.0, 2.0, 3.0, etc.

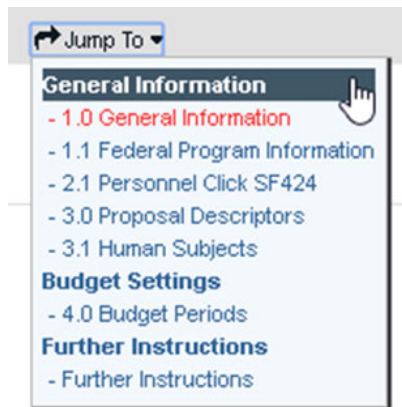
The screenshot displays a SmartForm interface. At the top, there is a navigation bar with buttons for 'Back', 'Save', 'Exit', 'Hide/Show Errors', and 'Print'. A 'Jump To' dropdown menu is open, showing a list of sections: 'General Information', '1.0 General Information' (highlighted), '1.2 Other Grant Program Information', '2.2 Personnel', '3.0 Proposal Descriptors', '3.3 Primary Purpose', 'Budget Settings', '4.0 Budget Periods', 'Further Instructions', and 'Further Instructions'. On the left side of the form, a sidebar lists sections: '1.0' (highlighted), '2.0', and '3.0'. The main content area shows the '1.0 General Information' section, which includes a search bar, a list of questions with checkboxes, and an 'Upload' button. The questions are: 'Principal Investigator / Program Director / Fellow:' (with 'Ronda Mitchell' selected), 'Identify the Mentor / Responsible Faculty Member:', 'If Sponsor requires FCOI Disclosure, attach form DSP-5 : [None]', 'Submitting Department:' (with 'HR-TRAINING-DEVELOPMENT' selected), 'Submitting Department ID:' (with '62010700' entered), and 'Primary Unit Administrative Contact:' (with 'Kelsey Aadland' selected).



Remember, due to the dynamic nature of SmartForms, each field you complete may reveal additional fields/pages requiring completion or hide fields/pages not needed.

Let's compare two federal proposals that display different pages depending on the answers given to certain questions on the SmartForm.

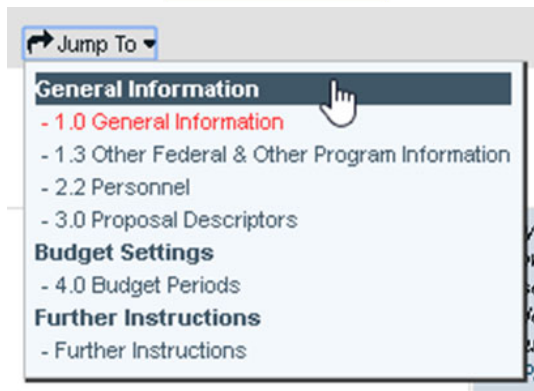
### NIH Proposal



Jump To ▾

- General Information**
  - 1.0 General Information
  - 1.1 Federal Program Information
  - 2.1 Personnel Click SF424
  - 3.0 Proposal Descriptors
  - 3.1 Human Subjects
- Budget Settings**
  - 4.0 Budget Periods
- Further Instructions**
  - Further Instructions

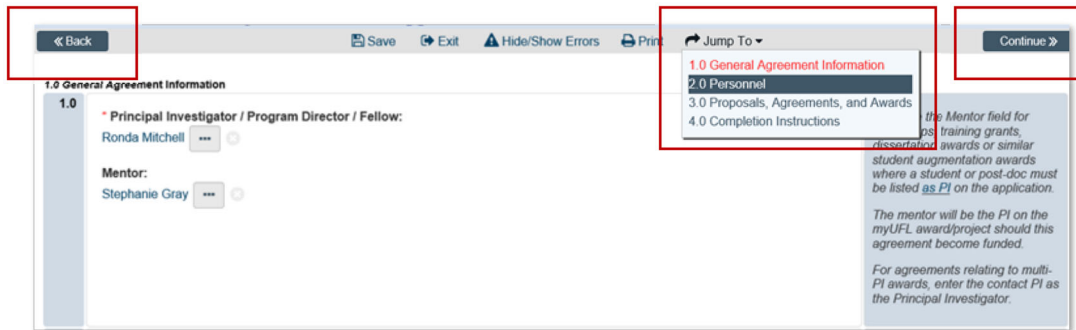
### NSF Proposal



Jump To ▾

- General Information**
  - 1.0 General Information
  - 1.3 Other Federal & Other Program Information
  - 2.2 Personnel
  - 3.0 Proposal Descriptors
- Budget Settings**
  - 4.0 Budget Periods
- Further Instructions**
  - Further Instructions

You can move through a SmartForm by clicking the Continue or Back buttons or you can choose to move to a particular section of the SmartForm by choosing the Jump To drop down field at the top of the SmartForm.



The screenshot displays a SmartForm interface with a top navigation bar. On the left, a red box highlights the '<< Back' button. In the center, a 'Jump To' dropdown menu is open, showing a list of sections: '1.0 General Agreement Information' (highlighted in red), '2.0 Personnel', '3.0 Proposals, Agreements, and Awards', and '4.0 Completion Instructions'. On the right, a red box highlights the 'Continue >>' button. The main content area shows the '1.0 General Agreement Information' section, which includes a red asterisk next to the title '\* Principal Investigator / Program Director / Fellow:' and a text input field containing 'Ronda Mitchell'. Below this is a 'Mentor:' section with a text input field containing 'Stephanie Gray'. To the right of the form, a text box provides instructions: 'the Mentor field for proposals training grants, dissertation awards or similar student augmentation awards where a student or post-doc must be listed as PI on the application. The mentor will be the PI on the myUFL award/project should this agreement become funded. For agreements relating to multi-PI awards, enter the contact PI as the Principal Investigator.'

Note that depending on the SmartForm, you may not be able to continue or jump to additional sections until all required fields are completed on the current page. Required fields will be indicated by a red asterisk.



Click the button to the right to work through a simulation navigating through UFIRST.

Navigation Simulation



# Chapter 4

## Searching, Filtering, and Final Assessment



As you use UFIRST, you will have access to multiple proposals, agreements, awards, etc. Within each module and from the worklist, you can filter and search to quickly locate desired records.

Create...

New Proposal

## Proposals

All Proposals

Pre Submission

Post Submission

Awarded

Filter by ?

ID

Enter text to search for



+ Add Filter

x Clear All

Export

No data to display.



Use the Filter by drop down field to choose what element you would like to search for. The search options change depending on what module you are in.

Examples of the different filter parameters per module are listed below.

## Proposals

All Proposals
Pre Submission
Post Submission

Filter by ?

- ID
- Name
- Date Modified
- State
- PI
- Sponsor
- Deadline
- Agency #
- Unit Contact
- Submitting Dept
- Dept ID
- Start Date
- DSP Contact
- Application Type
- Ready to Submit To Sponsor

ID

PRO00025722

PRO00025718

SmartForm 3

## CAS Exemptions

All CAS Exemptions
CAS Exemptions In Progress

Filter by ?

- ID
- Name
- Date Modified
- Project State
- Sponsor
- Award ID
- Project ID
- Project Manager
- Project Responsible Unit
- Unit ID
- Project Contact
- CAS Owner

ID

CAS00000971

CAS00000970

SmartForm 3



You can also add additional filters by click the Add Filter link at the end of the search field to create “and conditions” for the search action. For example, you can search for records that match a specific PI *and* a particular date range.

The screenshot shows a search interface with a tabbed menu at the top: 'All Proposals' (selected), 'Pre Submission', 'Post Submission', and 'Awarded'. Below the tabs, there is a 'Filter by' section. The first filter is 'PI' with a dropdown arrow, followed by a text input field containing 'John%'. To the right of this input is a magnifying glass icon and a red-bordered button labeled '+ Add Filter'. Further right is a link that says 'x Clear All'. Below the first filter, there is an 'and by' section with 'Date Modified' and a dropdown arrow, followed by a text input field containing '>1/1/2019'. To the right of this input is a link that says 'x Remove Filter'. At the bottom right of the filter section is a dark blue button labeled 'Export'.

Wildcards and operators are available to help you search more effectively.

The wildcard (%) can be used in place of unknown data. For example, in the image above using the wildcard after John will find all PIs with the name Johnson, Johnston, Johnsen, etc.







Operators are characters that will return specific results.

You can see the operators you can use and examples on how to use them by clicking the question mark next to the Filter by field label.

Click the button below to see a demo of how to search for records in UFIRST.

Searching Demo

#### Filter by Text

Type the first part of the text you want to find. Use % as a wild card.

Typing `Gre` finds "great," "Green," and "Greetings." Typing `%ack` finds "tack" and "Blackwell."

#### Filter by Dates

Type the date, such as `5/23/2015`. Filter to the minute by including the time, such as `5-23-15 1:42 PM`.

#### Use Comparison Operators to Make Your Filter More Efficient

Valid Operators: `=`, `>`, `>=`, `<`, `<=`

Filter a date field with `> 5/23/2015` to find all values after that date. Filter a numeric field with `!= 0` to find non-zero values.

#### Use Boolean Operators for Complex Searches

Valid Operators: `-or`, `-and`

Find any of several text values, such as filtering a name column with `Shawn -OR Shaun`.

Find everything between two numbers, such as filtering a numeric column with `> 10000 -and <= 50,000`.

