

Basic Step or Navigation	Description of Task to Complete at that Step
Navigate to	Grants > Proposals > Maintain Proposal
Click Add a New Value	
Click Add	
Screen is on Proposal Tab	
Enter Description	Enter a short description for the grant (a total of 30 characters is available)
Enter Title	Enter a proposal title (a total of 56 characters is available) following established naming conventions
Select PI ID	Select the PI (Principal Investigator) or grant manager
Select Sponsor ID	Select the grantor/sponsor necessary for this proposal
Select Pre-Award Administrator	Select yourself (or the appropriate person) from the look-up
Select Purpose	Select the purpose value that corresponds to the proposal approval workflow necessary for the proposal. The following purpose values can be selected and will require the corresponding routing.
Click Due By (hyperlink)	Enter Due Date , click OK to return to Proposal page
Click CFDA (hyperlink)	Select an CFDA for federal proposals
Facilities & Admin Requested	Uncheck for school grants and private grants less than \$100,000, leave checked for all others or if you are unsure. (Note: if you uncheck the box, you will get a confirmation message when saving this proposal.)
Enter Start Date / End Date-	Enter the start date and end date of the grant activities
Enter No. Periods	Enter '1'
Click Build Periods	Click this button
Click Projects tab	
Select Project Type	Select the revenue source from the matrix
Select Department	Select the location where grant activities will take place, click yes to update Subdivision and Institution when prompted
Click the Budgets tab	
Select a Budget ID	Use the four-digit fiscal year of the first month of grant activities.
Enter a Budget ID Description	Enter a Budget ID description within the 30 character maximum, e.g. Fiscal Year 2014
Click Save	
Click hyper-linked number "1"	This opens the Budget Detail Page.
On the Line Data tab, select a Budget Item field	Select only from the menu the categories (see reverse) of the proposal budget
Enter Total Direct dollars	Enter the total amount budgeted for the selected category
Click Plus sign to add another row	Repeat as many times as needed until the budget is complete
Click Save	In the bottom left corner of the screen
Click Return to Maintain Proposal	In the bottom left corner
Click Attachments tab	
Click the paper clip icon	The following documents should be attached to each proposal: <ol style="list-style-type: none"> Sponsor's Request for Proposals and/or application instructions SPPS' final project narrative Sponsor Forms (with signature) Final Budget Narrative (if not included in project narrative) Non-Standard Attachments (Not 501c3 letter, audit statements or board) Any memoranda of understanding, contracts, etc. to be submitted SPPS Board of Education Consent Agenda Item SPPS' pre-approval form
Click Browse	Navigate to the file to attach, select file , click Open
Click Plus Sign	To add another row and attachment (repeat as many times as necessary)
Click Save	
Click Resources tab	
Click Plus Sign	Under Professionals section at the end of the row with the PI, repeat to add as many rows as needed for the Purpose Type (see reverse)
Select Other Roles	Following purpose type, select in each row one of the roles for approval
Enter Employee IDs	For each "other role" identified, select the appropriate employee to fill that role
Verify Workflow Eligible	Be sure the Workflow Eligible box is checked for each row
Click Save	
Click Proposal tab	
Click Start Approval Process	Click the Yes button (in the pop-up box) to initiate the workflow process
End of process	Have a nice day!

PURPOSE TYPES

Purpose Type:	(CMD) CMD Special	(CNREA) REA Contract Approval	(CNTR) Contract Approval	(OFF) Funded Programs	(ENTLM) Entitlement Grants	(DISTR) District Wide	(PLAY) Playground	(SCHLG) School Grant	(SCPED) Special Education	No purpose selected
Corresponding Approvals:										
Grant Initiator (GRIN)		•	•	•		•			•	•
Program Lead (PRGL)						•				
Principal (PRIN)							•	•		
Contract Coordinator (CADM)		•	•							•
Development Director (CMD)	•					•	•	•		
Research Director (REA)	•	•				•	•	•		
General Counsel (LEGA)		•	•							•
Other Senior Administrator (CHIE)		•	•			•			•	•
Assistant Superintendent (ASUP)						•	•	•	•	
Chief Engagement Officer (ENGO)	•									
Chief Academic Officer (CAO)				•		•		•	•	
Chief of Staff (COS)	•					•	•	•	•	
Deputy Superintendent (DEPU)						•	•			
Superintendent (SUPT)	•	•	•	•		•	•	•	•	•

PROJECT TYPES / REVENUE SOURCES

Type	Grants
PD	Title I Entitlements ONLY
AC	Federal Grants
001	Department of Education Grants (except Title VII and Johnson O'Malley)
002	Title VII ONLY
003	Non Education Grants (DOJ, DOT, EPA, HHS, etc.)
004	Johnson O'Malley ONLY
PR	Special Education Entitlement Grants ONLY
PA	All Other Grants
001	Federal funding from MDE – NOT district wide (SIG)
002	Federal funding from MDE – ONLY district wide (Most Grants)
003	Federal funding from a State Agency (could be UMN)
004	MDE Grants (not Federal)
005	Perpich Center for the Arts, MN State Arts Board
006	Non Education State Grants (MDH, MAELC, other UMN)
007	All Private Grants (Travelers, 3M, Ecolab)
008	All City or County Grants (STAR, Children's Collaborative)

BUDGET CATEGORIES

Budget Item	Description
ALL_INCLUSIVE	All Inclusive
SUB<25	Contractual \$25,000 or less
SUB>25	Contractual- Greater than \$25K
EQUIPMENT	Equipment
FRINGE_FTE	Fringe Benefits - FTE Based
FRINGE_PERCENT	Fringe Benefits - Percentage B
INDIRECT	Indirect
OTHER	Other
PERSON_ADDSTI	Personnel - Additional Stipend
PERSON_LIC	Personnel - Licensed
PERSON_UNLIC	Personnel - Unlicensed
STUDENT_TRNSPRT	Student Transportation
SUPPLIES_STAFF	Supplies - Staff
SUPPLIES_STUDNT	Supplies - Students
TRAVEL	Travel