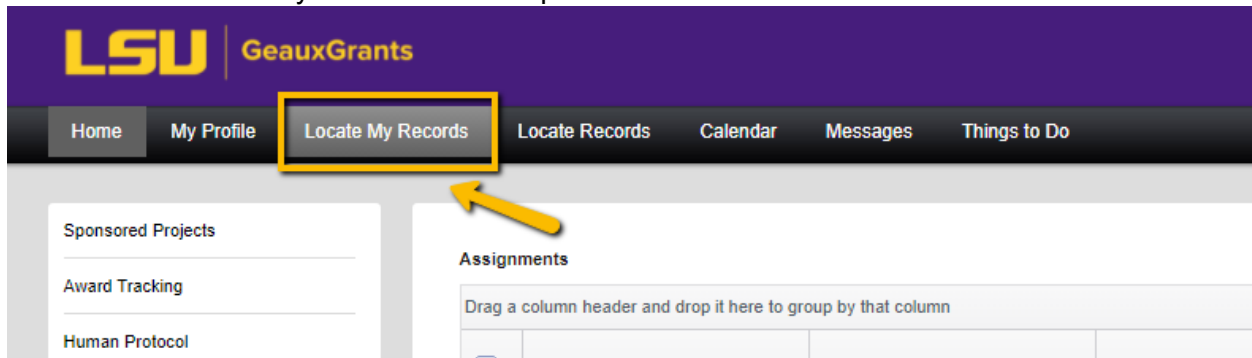


Search Options for Sponsored Projects and Award Tracking Modules

Locate My Records

- Click Locate My Records in the top menu.



- Will show list of all records for which you are a Record Owner (i.e. Principal Investigator).
- To see records where you are a Co-Investigator, you will need to do a search by Record Personnel.

Records I am Named On Widget

- Home screen widget shows all records you are named on this includes as PI, Co-Investigator or Personnel.

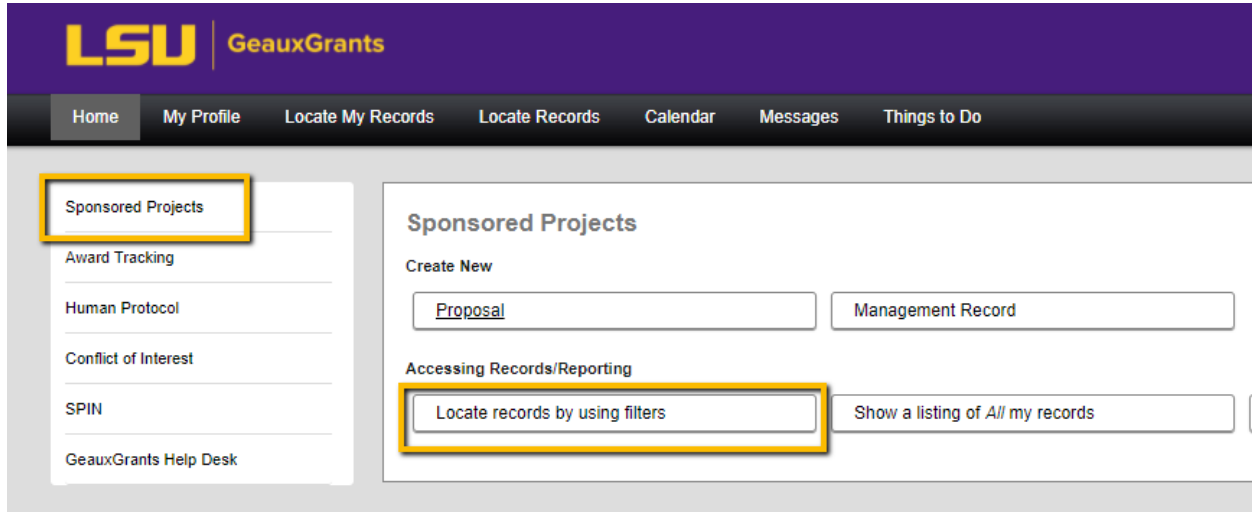
The image shows a full screenshot of the GeauxGrants home page. The 'Records I am Named On' widget is highlighted with a yellow arrow. The widget displays a table of records with columns for Record Number, Record Type, and Assigned. Below the table, there are sections for GeauxGrants Help, Help & Training, and Policy Documents.

Record Number	Record Type	Assigned
AWD-AM220158	Award	
AWD-AM220084	Award	
AWD-49800-1	Award	
AWD-49801-1	Award	
AWD-AM210783	Award	
AWD-AM220140	Award	
COIAM01151	Conflict of Interest	
AM210783	Proposal	
AM210993	Proposal	
49800-1	Proposal	
49801-1	Proposal	
AM220084	Proposal	

- You can filter by Record Number and Record Type to sort.

Sponsored Projects Search (proposals)

- Click Sponsored Projects in left menu and then click “Locate records by Using Filters.



- You can search by one field or multiple fields to narrow your search.
- For date fields, the between option allows to search between 2 dates
- You can also click on grey section of look-up to change criteria.

Select 'Locate' Criteria Save Get Help Close

Modules available for searching across:

Award
 Conflict of Interest / PM-11
 Human Protocol
 IACUC

Sponsored Project

Available fields to search by	Selected fields
<input type="checkbox"/> Record Creation Date <input type="checkbox"/> Record Number <input type="checkbox"/> Record Owner <input type="checkbox"/> Record Owner Primary Department <input type="checkbox"/> Record Associated Departments <input type="checkbox"/> Record Personnel <input type="checkbox"/> Record Personnel Department <input type="checkbox"/> Record Primary Department <input type="checkbox"/> Record Primary Sponsor <input type="checkbox"/> Primary Sponsor Type <input type="checkbox"/> Record Status <input type="checkbox"/> Record Title <input type="checkbox"/> AT Award Increment Award Number <input type="checkbox"/> Awarded End Date	<input type="checkbox"/> Awarded Start Date <input type="checkbox"/> Deadline <input type="checkbox"/> Grant Coordinator Information <input type="checkbox"/> Grants.gov ID Number <input type="checkbox"/> Keywords <input type="checkbox"/> Opportunity Number <input type="checkbox"/> Originating Sponsor <input type="checkbox"/> Originating Sponsor Type <input type="checkbox"/> OSP Specialist <input type="checkbox"/> Proposal Type <input type="checkbox"/> Sponsor Program <input type="checkbox"/> Sponsor Proposal Number <input type="checkbox"/> Subaward Institution <input checked="" type="checkbox"/> Submitted Date

Submitted Date

- = Exact match
- > Greater than
- >= Greater than or equal to
- < Less than
- <= Less than or equal to
- <> Not equal to
- B Between**
- O Outside

- Below is a crosswalk of Sponsored Project Search Fields and Output.

Available fields to search by:	Search Output:
Record Associated Departments	Department(s) of Record Personnel or investigator allocation.
Record Creation Date	Date Proposal record was created.
Record Number	LSU Proposal Number
Record Owner	Principal Investigator (PI) of Proposal
Record Owner Primary Department	Principal Investigator's Primary Department listed on proposal
Record Personnel	Personnel listed on Personnel tab.
Record Personnel Department	Departments of the Personnel listed on the Personnel tab.
Record Primary Department	PI's Department that will administer award in Workday
Record Primary Sponsor	Sponsor to which proposal is submitted
Record Primary Sponsor Type	Type of Sponsor (i.e. Federal, For Profit, Non-Profit)
Record Status	Current Status of Proposal (I.e. Routing, Submitted, Approved to Submit)
Record Title	Title of Proposal
AT Award Increment Award Number	Sponsor Award Number
Awarded End Date	Current End Date of Award
Awarded Start Date	Start Date of Award
Deadline	Proposal Deadline
Grant Coordinator Information	Department Grant Coordinator listed on proposal
Grants.gov ID Number	Grants.gov Tracking Number
Keywords	Proposal Keywords from the LSU Questionnaire #19
Opportunity Number	Sponsor Funding Opportunity Announcement
Originating Sponsor	Original Sponsor when LSU is a subrecipient.
Originating Sponsor Type	Type of Original Sponsor (i.e. Federal, For Profit, Non-Profit)
OSP Specialist	OSP Specialist assigned to the record
Proposal Type	Proposal Type (i.e. New, Continuation-New, Modification/Prior Approval Request, etc.)
Sponsor Program	Search by agency wide programs (e.g. NSF CAREER, NIH R01, BOR RCS).
Sponsor Proposal Number	Sponsor Proposal Tracking Number
Subaward Institution	Proposed Subaward Institution Name
Submitted Date	Date Proposal was Submitted to sponsor or emailed to PI/Dept Admin to submit to the sponsor

Award Tracking (awards)

- Click Award Tracking in left menu and then click "Locate records by Using Filters."

The screenshot shows the GeauxGrants web interface. At the top, there is a navigation bar with links: Home, My Profile, Locate My Records, Locate Records, Calendar, Messages, and Things to Do. On the left side, there is a sidebar menu with the following items: Sponsored Projects, Award Tracking (highlighted with a yellow box), Human Protocol, Conflict of Interest, SPIN, and GeauxGrants Help Desk. The main content area is titled 'Award Tracking' and contains a 'Create New' section and an 'Accessing Records/Reporting' section. In the 'Accessing Records/Reporting' section, there are two buttons: 'Locate records by using filters' (highlighted with a yellow box) and 'Show a listing of All my records'.

- You can search by one field or multiple fields to narrow your search.
- For date fields, the between option allows to search between 2 dates
- You can also click on grey section of look-up to change criteria.

- Below is a crosswalk of Award Tracking Search Fields and Output.

Available fields to search by:	Search Output:
Record Associated Departments	Department(s) of Record Personnel or investigator allocation.
Record Creation Date	Date Award was created.
Record Number	LSU Proposal Number
Record Owner	Principal Investigator (PI) of Proposal
Record Owner Primary Department	Principal Investigator's Primary Department listed in Workday
Record Personnel	PI and Co-Investigators on award
Record Personnel Department	Departments of the Record Personnel
Record Primary Department	PI's Department that will administer award in Workday
Record Primary Sponsor	Sponsor to which proposal is submitted
Primary Sponsor Type	Type of Sponsor (i.e. Federal, For Profit, Non-Profit)
Record Status	Overall Award Record Status (e.g. Awarded or Closed).
Record Title	Title of Proposal
Award Date	Initial Award Received Date
Award Increment Status	Status of Award Increment (See Overviews - Award on GeauxGrants Helpdesk for definitions of Award Increment Status)
End Date	Current End Date of Award
ID#	Sponsor Award Number
Start Date	Start Date of Award

Save Frequent Searches

- You can save frequently run searches by selecting the Available Fields to Search By and then clicking Save in top right.

Select 'Locate' Criteria Save Get Help Close

Modules available for searching across:

Award Conflict of Interest / PM-11 Human Protocol IACUC

Sponsored Project

Available fields to search by	Selected fields
<input type="checkbox"/> Record Creation Date	Record Personnel
<input type="checkbox"/> Record Number	= <input type="text"/>
<input type="checkbox"/> Record Owner	Record Primary Sponsor
<input type="checkbox"/> Record Owner Primary Department	= <input type="text"/>
<input type="checkbox"/> Record Associated Departments	
<input checked="" type="checkbox"/> Record Personnel	
<input type="checkbox"/> Record Personnel Department	
<input type="checkbox"/> Record Primary Department	
<input checked="" type="checkbox"/> Record Primary Sponsor	
<input type="checkbox"/> Primary Sponsor Type	
<input type="checkbox"/> Record Status	
<input type="checkbox"/> Record Title	
<input type="checkbox"/> AT Award Increment Award Number	
<input type="checkbox"/> Awarded End Date	

- Name the Search and click Save

Save Search Save Cancel

Enter a name for this saved search

9 of 30 characters remaining

- To access your Saved Searches, you can either:
 - 1) Click Get from Locate Records Using Filters:

Select 'Locate' Criteria Save Get Help Close

Modules available for searching across:

Award Conflict of Interest / PM-11 Human Protocol IACUC

Sponsored Project

Available fields to search:

- Record Creation Date
- Record Number
- Record Owner
- Record Owner Primary D
- Record Associated Depa
- Record Personnel
- Record Personnel Depar
- Record Primary Departm
- Record Primary Sponsor
- Primary Sponsor Type
- Record Status
- Record Title
- AT Award Increment Awa
- Awarded End Date

Load Search Close

Saved Browse Searches	Module	
Personnel and Sponsor	Sponsored Project	Del

Search

- 2) Add Saved Browse Template widget to Home Screen. See [Update Your Profile & Home Screen](#) for instructions on how to add Home Screen widgets.

- PM 11 - Outside Employment
- PS 98 - Financial Conflicts of Interest in Research

Saved Browse Template

Saved Browse Searches	Module	
Personnel and Sponsor	Sponsored Project	Del