

Search Options for Sponsored Projects and Award Tracking Modules

Locate My Records

• Click Locate My Records in the top menu.

LS	Ge	auxGrants					
Home	My Profile	Locate My Records	Locate Records	Calendar	Messages	Things to Do	
Sponsored	l Projects						
Award Trac	cking		gnments g a column header and	dron it here to ar	oup by that colum	n	
Human Pro	otocol	Dia		arop it note to gr			

- 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.

											Welcome Test (L17	') Mike Tiger Logout
me My Profile Locate M	My Records	Locate Records	s Calendar Me	ssages Things to [)o							Quick Find
sored Projects												
rd Tracking		ignments									Open	Your action items
n Protocol	Drag	a column header an	id drop it here to group by	hat column								
		Module	Record Number	Record Owner	Object T	Assignment Type	T Re	cord Status	Y Subject		T	Assigned
ct of Interest		Award Tracking	AWD-AM220158	Tiger, (L17) Mike the	Award Increment	Action Item	PI	Award Review	Award Number: AWD-AM220158 - A	WARD NEEDS YOUR ACTI	ON	18-Aug-2021 2:37:23 F
	•	Proposal Tracking	49801-1	Tiger, (L17) Mike the	Agreement	Action Item	PI	Review	Proposal Number: 49801-1 - New sul approval	baward or subaward amen	idment needs your	19-Aug-2021 11:07:42 AM
xGrants Help Desk	•	Proposal Tracking	49801-1	Tiger, (L17) Mike the	Agreement	Action Item	PI	Review	Proposal Number: 49801-1 - New sul approval	paward or subaward amen	idment needs your	20-Aug-2021 2:02:09 F
act Info	•	Proposal Tracking	AM220174	Tiger, (L17) Mike the	Initial Application	Dashboard	R	uting	Review needed for Other Miscellaner Tiger due	ous Agreement AM220174;	PI Test (L17) Mike the	23-Aug-2021 5:02:07 F
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cedesk@lsu.edu sored Projects d Tracking c ISponsored Programs 578-3760 jsu.edu an Subjects Review	Please PM-1	e refer to <mark>Syster</mark> 11 forms can be crea	m Messages for impo		s and updates to	o GeauxGrants.]		Record Number AWD-AM220158 AWD-AM220084 AWD-49800-1	A A A	ward ward ward	
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• 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.

LSU Gea	auxGrants	
Home My Profile	Locate My Records Locate Records Calendar Messages Things to Do	
Sponsored Projects Award Tracking Human Protocol	Create New Proposal Management Record	
Conflict of Interest	Accessing Records/Reporting	
SPIN	Locate records by using filters Show a listing of All my records	
GeauxGrants Help Desk		

- 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.

elect 'Locate' Criteria			Save Get Help	Clos
Nodules available for searching across:				
Award Conflict of	Interest / PM-11 UHuman Protocol			
Sponsored Project				
Available fields to search by		Selected fields		Searc
Record Creation Date	Awarded Start Date	Submitted Date		
Record Number	Deadline		= Exact match	
Record Owner	Grant Coordinator Information		> Greater than	
Record Owner Primary Department	Grants.gov ID Number		>= Greater than or equa < Less than	ai to
Record Associated Departments	Keywords		<= Less than or equal to	0
Record Personnel	Opportunity Number		<> Not equal to	
Record Personnel Department	Originating Sponsor		B Between	
Record Primary Department	Originating Sponsor Type		O Outside	
Record Primary Sponsor	OSP Specialist			
Primary Sponsor Type	Proposal Type			
Record Status	Sponsor Program			
Record Title	Sponsor Proposal Number			
AT Award Increment Award Number	Subaward Institution			
Awarded End Date	Submitted Date			

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.

LS	Gea	auxGrants				
Home	My Profile	Locate My Records	Locate Records	Calendar	Message	es Things to Do
_						
Sponsored Award Track	king	Awa Create	rd Tracking			
	10001	Acces	sing Records/Reportin	g		
Conflict of I	nterest	Lo	cate records by using	filters		Show a listing of A// my records
SPIN						
GeauxGran	ts Help Desk					

- 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.

elect 'Locate' Criteria			Save Get Help C
Modules available for searching across: Award Conflict of Inter Sponsored Project	rest / PM-11 🗌 Human Protocol 📄 IA	cuc	
Available fields to search by		Selected fields	Se
 Record Creation Date Record Number Record Owner Record Owner Primary Department Record Associated Departments Record Personnel Record Personnel Department Record Primary Department Record Primary Sponsor 	 Primary Sponsor Type Record Status Record Title Award Date Award Increment Status End Date ID # Y Start Date 	Record Owner Start Date B	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 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 Sponsored Project	Interest / PM-11 🗌 Human Protocol 🗌 IA	Acuc	
Available fields to search by		Selected fields	Search
 Record Creation Date Record Number Record Owner Record Owner Primary Department Record Associated Departments Record Personnel Record Personnel Department Record Primary Department Record Primary Sponsor Primary Sponsor Type Record Status Record Title AT Award Increment Award Number Awarded End Date 	 Awarded Start Date Deadline Grant Coordinator Information Grants.gov ID Number Keywords Opportunity Number Originating Sponsor Originating Sponsor Type OSP Specialist Proposal Type Sponsor Program Sponsor Proposal Number Subaward Institution Submitted Date 	Record Personnel Record Primary Sponsor	

• Name the Search and click Save

Department Grants.gov ID Number	=
Save Search	Save Cancel
Enter a name for this saved search Personnel and Sp 9 of 30 characters remaining	ponsor
Proposal Type	

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



2) Add Saved Browse Template widget to Home Screen. See <u>Update Your Profile &</u> <u>Home Screen</u> for instructions on how to add Home Screen widgets.

Saved Browse Templa	e
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