# Finding a Proposal

How Can I Find a Proposal Previously Created?

The Proposal Development (PD) # or Proposal ID # is the most efficient way to find a proposal in the system. When creating Proposal records, best practice is to record this number and keep track of your PDs. Users are granted access to proposals based on the user's home unit (SAP Cost Center) and roles.

To Search for a proposal the user previously created:

☐ Click on the **Proposal** tab in the top menu row.
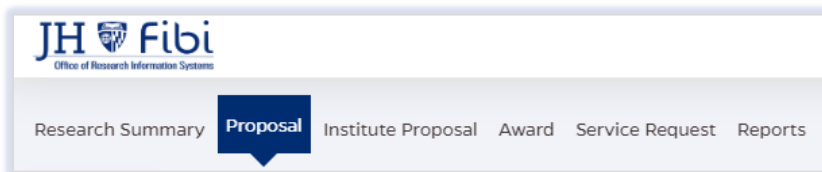
The list will automatically default to the **My Proposals** tab in the second row of the menu. This list is in order by PD number. However, the user can sort these lists by ID, Title, Principal Investigator, Lead Unit, Proposal Type, Sponsor, or Deadline.

☐ To sort, click on the grey arrow ↓⅑ or ↓ᴬᴢ next to the column heading.

- o Click the grey arrow once and the list will sort in order from A-Z or 1-9.
- o Click the arrow again and the list will sort in reverse order.
- o Click the arrow a third time to turn off the sort.
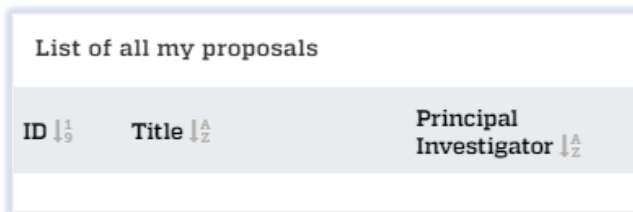
Lists can also be sorted by multi-level criteria. Lists are sorted by the order in which the criteria are clicked.

To Search for a proposal from the Proposal Search Tab:

☐ Click on the **Proposal** tab in the top menu row.
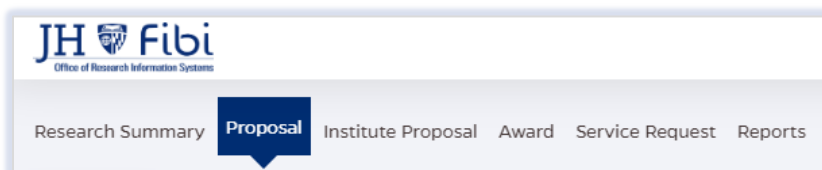
☐ Choose the **Proposal Search** tab on the second menu row.

☐ Click on the **Search** field and begin entering either the Proposal ID, Title, PI's last name, or Sponsor. A dropdown will populate with options. Click on the appropriate option in the dropdown list.

To Create a List of Proposals waiting for Approval:

To create a list of all of proposals with the status of **Approval in Progress**, complete the following steps:

☐ Click on the **Status of Proposal** field and choose **Approval in Progress** from the dropdown.
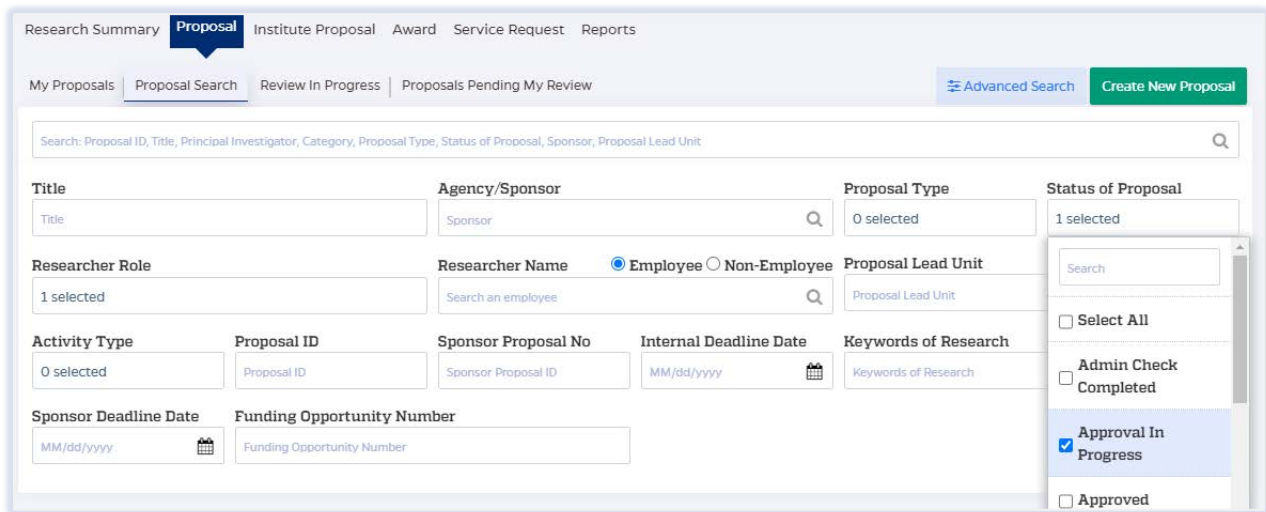
☐ Click on the **Search** button.

If more criteria are required, visit the appropriate field and choose from the dropdown or enter text as desired. Multiple criteria can be selected.