

# Funding Proposal Navigation and Basic Tasks

 [Navigate the General Dashboard Video](#) (opens in a new tab)

 [Navigate the Funding Proposal Workspace Video](#) (opens in a new tab)

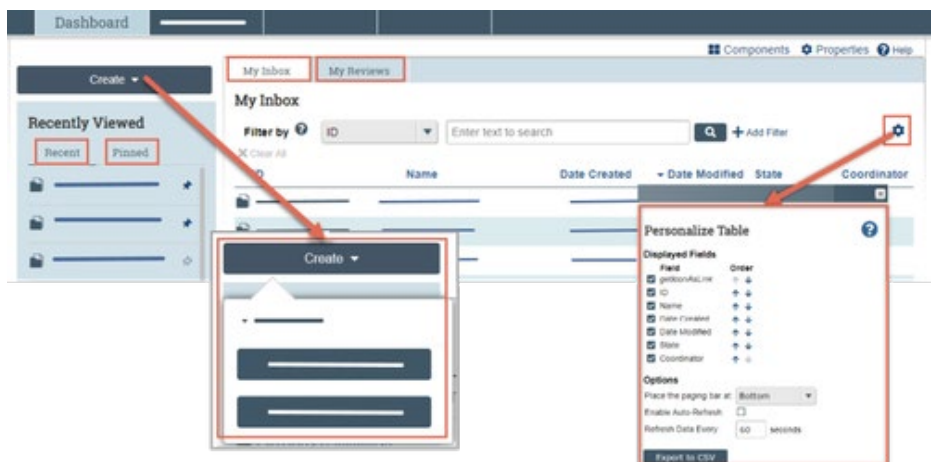
 [Navigate the Budget Workspace Video](#) (opens in a new tab)

When you first log in, you will be on your Dashboard, which is the starting point for finding items and performing many basic tasks.

## To find key items

From your Dashboard, you will see:

- **My Inbox:** Items that require you to take action.
- **My Reviews:** Items assigned to you to review. These are a subset of the items in My Inbox.
- **Create menu and buttons:** Actions you can perform. The menu will not show if you do not have access to any buttons.
- **Recently Viewed:**
  - **Recent:** The last several items you viewed. Scroll through this list to find an item you worked on recently.
  - **Pinned:** You can pin the items in Recently Viewed section for quick and easy access. This is where those pinned items are listed.
- **Personalize Table:** You can alter the tables displayed on the dashboard by using the Personalize Table gear icon.



## To identify what action is needed

Review the state column of records in My Inbox.

The state gives a clue as to what to do next. For example, “Department Review: Response Pending from PI” means the department reviewer is waiting for you to respond to review comments they made on a funding proposal. You can open it, and make any needed changes, and then resubmit it to the department reviewer.

My Inbox

Filter ? ID [ ] Go + Add Filter x Clear All

ID	Name	Date Created	Date Modified	State
[ ]	[ ]	[ ]	[ ]	Department Review
[ ]	[ ]	[ ]	[ ]	Department Review: Response Pending from PI
[ ]	[ ]	[ ]	[ ]	Specialist Review

## To open a record awaiting your action

1. From My Inbox, click the record name.
2. The workspace for the record opens.

**Tip:** A list of activities you can perform appears on the left.

## To view record history

1. From the record workspace, click the **History** tab.
2. The history lists the actions performed on the record to date, including comments or generated documents added.

## To find a funding proposal not on the Dashboard

1. In the Top Navigator, click **Grants**.
2. In the Sub-Navigator, click **Funding Proposal**.
3. To further narrow your search, you can:
  1. Sort the records in various ways by clicking the column headings.
  2. Filter the records by name, state, or other attributes, using the filter tool at the top of the list.
4. Click the name of the desired funding proposal.

The proposal workspace opens.