



1. NAVIGATION BASICS

This procedure is about navigating in various parts of the eSRA system.

A. Top Banner Actions	1. "My Home" button
	2. Log off
B. Top Navigation Bar	1. Grants
	2. Researcher Profile
	3. Company Profile
C. Proposal Workspace	1. Proposal Title Section
	2. Current State
	3. Activities
	4. Summary Information
	5. Information Tabs
D. eSRA Proposal	1. Back and Continue
	2. Save and Exit
	3. Hide/Show Errors
	4. Print
	5. Jump To:
	6. Bottom Navigation
E. Submission to Sponsor	1. Submission to Sponsor Tab (OSPIP COs only)
	2. Link to SF424 Proposal Workspace

IMPORTANT INFORMATION

- eSRA can be used with any web browser, but works best with Internet Explorer.
- Separate instructions are being written for navigating within individual views and keyboard shortcuts for ergonomic issues and efficiency.

				
Caution Warning	Serious Warning	Notes	Tips	Important

A. Top Banner Actions

Top Banner Actions are available from any Workspace, but not when editing a proposal or profile. Each user has a home workspace using a template based on their assigned role(s).

1. "My Home" goes to the user's home page.



"My Home" is where you will be when you log-in to eSRA from your browser. If you link into eSRA from an email notification, you will land in the proposal workspace referenced in the email notification.

- 1a. The user's current role will be in the top orange box.
- 1b. All roles available to the user are listed below. The contents of the inbox are based on the user's role. For example: A PI that also has the role of Division Reviewer will see different proposals in the inbox based on what role s/he is logged in as.
- 1c. Proposal Tabs sort proposals based on their status. A proposal may be listed on more than one tab.
- 1d. Create a new Proposal is done from the Home Page.

2. Log off

eSRA Proposal System
LAWRENCE BERKELEY NATIONAL LABORATORY

Cynthia Sylvester | My Home | **Logoff**

Grants Researcher Profile Company Profile

Page for Cynthia L Sylvester Layout

Resource Analyst

My Roles
OCO
Registered User
Resource Analyst

[New Funding Submission](#)

Page for Cynthia L Sylvester
Welcome to your eSRA Proposal System Personal Workspace. From this workspace you can manage your proposals that are:

- My Inbox – This Tab allows you to view all proposals that require action by you or someone on your proposal team.
- Due Today – This Tab will allow you to manage your proposals that are due today.
- In Progress – This Tab will allow you to track the proposals you are working on for submission.
- Submitted – This Tab will allow you to track your submitted proposals.
- Awarded – This Tab will allow you to track your awarded proposals.
- Declined – This Tab will allow you to track your declined proposals.

[My Inbox](#)
[Due Today](#)
[In Progress](#)
[Submitted](#)
[Awarded](#)
[Declined](#)

Proposals that require action

ID	Name	SmartForm	State	Due Date	Principal Investigator	Date Modified
FP00000168	PHG Copy of FP158	[Edit]	Preparation	10/5/2012	Williams	3/15/2011 3:50 PM

B. Top Navigation Bar

The Top Navigation Bar is available from the Home page and Workspaces (Proposal Workspace, Grants Workspace, Researcher Profile Workspace, and Company Profile Workspace)

1. Grants lists all grants the user has access to

2. Researcher Profile contains the information on LBNL researchers.



A Researcher Profile is not required for all researchers. A PI must have a Researcher Profile and anyone that needs a Person Profile in a Grants.gov application. See Researcher Profile Step-by-Step Instructions for more information.

eSRA Proposal System
LAWRENCE BERKELEY NATIONAL LABORATORY

Cynthia Sylvester | My Home | Logoff

Grants Researcher Profile **Company Profile**

1 Page for C 2 Sylvester 3

Resource Analyst

My Roles
OCO
Registered User
Resource Analyst

New Funding Submission

Page for Cynthia L Sylvester

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- Declined – This Tab will allow you to track your declined proposals.

My Inbox Due Today In Progress Submitted Awarded Declined

Proposals that require action

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3. Company Profile



Users have read-only access to company profile information. The eSRA Sponsor Administrator provides updates to the Company Profiles and can be reached at sponsors@lbl.gov

eSRA Proposal System
LAWRENCE BERKELEY NATIONAL LABORATORY

Cynthia L Sylvester | My Home | Projects | Logoff

Grants Researcher Profile **Company Profile**

Company Profile

Layout Properties Permissions Subscribe Help

Company Profile

Active Denied All

Active Company Profiles

Filter by Name [Go] [Clear]

Name	SmartForm
ACME, inc.	[Edit]
Click Commerce, Inc.	[Edit]

C. Proposal Workspace

1. Proposal Title section

1a. Proposal's Nickname will appear in the list of proposal in the Home Inbox and on the Grants list.

1b. Proposal #

2. Current State

2a. Proposal components associated with the current state.

3. Activities available in the current state based on the role of the user.

4. Summary information includes Proposal Information, Budget Totals, and SF424 Information

The screenshot shows the Proposal Workspace interface. Callout 1a points to the proposal title 'Test using Blakely NASA example'. Callout 1b points to the proposal number 'FP00000324' and the state 'Funding Proposal'. Callout 2 points to the 'CURRENT STATE' section, which is currently set to 'Preparation'. Callout 2a points to the 'PROPOSAL INFORMATION' tab. Callout 3 points to the 'My Activities' sidebar, which lists various actions like 'Administration', 'Copy Funding Proposal', 'Update SF424', etc. Callout 4 points to the summary information section, which includes 'PROPOSAL INFORMATION', 'BUDGET TOTALS', and 'SF424 INFORMATION'.

PROPOSAL INFORMATION		BUDGET TOTALS		SF424 INFORMATION	
Primary Sponsor:	National Institutes of Health	Starting Date:	11/1/2012	SF424 Tracking#:	
PI:	Eleanor A Blakely	Number of Periods:	5	SF424 Received Date/Time:	
OCO:	David A Garcia	Total Direct:	\$1,209,825	SF424 Status Updated:	
RA:	Karen Dickinson-Mazzei	Total Indirect:	\$395,526	SF424 Current State:	Pre-Submission
Status of Science:	Draft	Total LBNL Costs:	\$1,605,351	PDF Version	
Submission Deadline:	10/5/2012	FAC Costs:	\$48,161		
NIH Application #:		Total Project Costs:	\$0		
		Sponsor Costs:	\$0		
		Awarded Total:	\$0.00		

5. Information Tabs contain information about the proposal

- 5a. Proposal Information is the main proposal page
- 5b. PIF – Proposal Information Form Tab provides answers to the questions relevant to LBNL review.
- 5c. Approvals – For a list of approvals including approver and date
- 5d. Comments lists all the comments that have been entered for the proposal
- 5e. Attachments – A list of most of the attachments uploaded in the proposal. (Currently the biosketches for key persons and subcontract documents are not in this listing.)
- 5f. Contacts – The LBNL people associated with the proposal including contact info
- 5g. Submission to Sponsor – link to the submission workspace (used by OSPIP)
- 5h. New Sponsor Requests – when a new sponsor is required for the proposal
- 5i. Change Log tracks who made which changes in a proposal
- 5j. History Log tracks actions taken on the proposal

The screenshot shows a web application interface for proposal management. At the top, there are navigation tabs for 'Grants', 'Researcher Profile', and 'Company Profile'. Below this is a breadcrumb trail: 'Grants > Test using Blakely NASA...'. The main header area contains a row of tabs labeled 5a through 5i, with 5a being the active tab. Below the tabs is a 'CURRENT STATE' section with a 'Preparation' button. To the left is a 'My Activities' sidebar with various actions like 'Administration', 'Copy Funding Proposal', 'Update SF424', etc. The main content area is divided into three columns: 'PROPOSAL INFORMATION', 'BUDGET TOTALS', and 'SF424 INFORMATION'. A red box highlights the tabs and the 'PROPOSAL INFORMATION' section. Below this, another red box highlights a '5j' tab and a 'History' section, which currently shows 'The query produced no results.'

PROPOSAL INFORMATION		BUDGET TOTALS		SF424 INFORMATION	
Primary Sponsor:	National Institutes of Health	Starting Date:	11/1/2012	SF424 Tracking#:	
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NIH Application #:		Total Project Costs:	\$0		
		Sponsor Costs:	\$0		
		Awarded Total:	\$0.00		

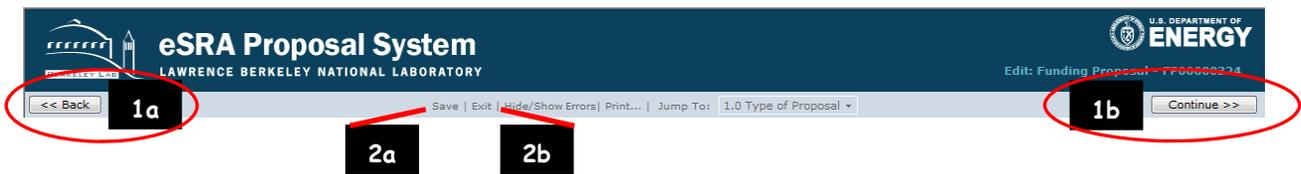
D. eSRA Proposal The eSRA Proposal contains the information entered in eSRA, some of which will be used to create the

Submission to the Sponsor and some of which will be used to create the PIF for internal review of the proposal.

1. Back and Continue

1a. "Back" goes to the previous View without saving the updates to the current View.

1b. "Continue" goes to the next View and saves the updates to the current View.



2. Save and Exit

2a. "Save" saves the updates to the current View, but does not navigate anywhere.

2b. "Exit" navigates out of the proposal and back to the Proposal Workspace. The user is prompted to save (or not) if there have been updates in the current View.



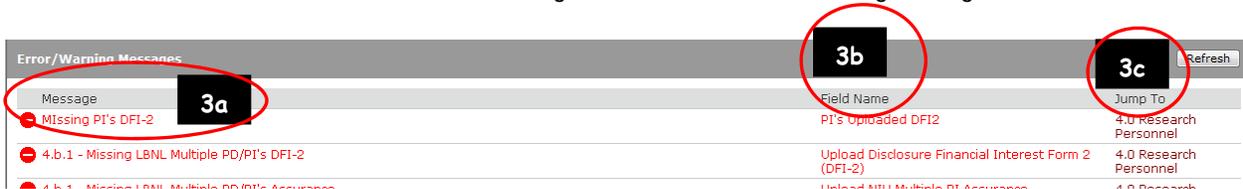
3. "Hide/Show Errors" validates the eSRA proposal against required fields and business rules and displays the results.

3a. Error or warning message

3b. Field that contains the error

3c. View that contains the error (with a hypertext link to jump to that location)

3d. Click "Hide/Show Errors" again to close the "Error/Warning Message" window.



4. "Print" will print the current View only.



5. "Jump To:" pulls down a list of all Views in this proposal that the user can navigate to by jumping directly to that View.

E. Submission to Sponsor

eSRA will create all or part of the actual submission to the sponsor.

See the Proposal Preparation Instructions (still in development) for instructions on creating the submission to the sponsor.

1. "Submission To Sponsor" Tab is only available to OSPIP Contract Officers

2. Link to SF424 Proposal Workspace

