



## QUICK REFERENCE GUIDE - SPONSORED PROGRAMS MODULE (July 2011)

### Creating a New Routing Form

Please use the following guide to help you complete the Form Preparation and Form Routing steps.

#### Step 1: Form Preparation

1. Log in to NUgrant at [nugrant.unl.edu](http://nugrant.unl.edu)
2. In NUgrant home page, in Sponsored Programs section, select “Add a New Form”
3. Determine if the new Form will be part of an existing Project record or will create a new Project record

#### To Add a new Form to *existing Project*

4. Select “Yes” to question: Is this a new form for an existing project? and choose existing Project ID
5. New Form is created with much of the information pre-populated from the Project record

OR

#### To Create a new Form as part of a *new Project*

4. Select “No” to question: *Is this a new form for an existing project?*
5. New blank Form is created, which also creates a new Project record

#### To complete Form pages

6. Verify or complete all relevant fields (mandatory fields are indicated by \*) on the 10 Form pages
7. Select checkbox “Check if page is complete” at bottom of each page
8. Use navigation buttons at bottom of pages or in the left column to move through Form
9. On the final page select “Save” when complete
10. You will see a green box indicating Step 1 Complete
11. To move to Step 2, Routing, you select the “Next” arrow in this green box

#### Step 2: Routing

An approval route is the path taken by a Form to obtain UNL internal approvals prior to submission of a proposal to an external sponsor.

There are two main kinds of routes – administrative and cost share. Administrative routes may include a department chair/head, center/unit director and dean/vice chancellor. Cost share routes include any cost share approvers necessary for the proposal Form.

#### To Select an Administrative Route for a Form

1. Each department represented by a Senior/Key Person must have an approval route (Approval routes are automatically added when the department has only one route available)
2. To add a route not automatically listed, select “Add an Administrative Route”
3. Select the appropriate route from the list and choose “Add” button
4. Repeat as needed

#### To Select a Cost Share Route for a Form, when required

1. Select “Add a Cost Share Route”
2. Select appropriate route in list and choose “Add” button
3. Fill in the amount to be approved by individual(s) in the list
4. Repeat as needed

(If no predetermined routes are shown, or a new route needs to be created, contact your departmental or college liaison or the NUgrant staff.)

#### To Start Form routing

5. After required routes are added, select the “Start Routing” button at the bottom of the page
6. You will see a green box indicating you have successfully started routing the Form
7. To view the progress of the route, select the “Next” arrow in this green box
8. You may return to this view by selecting the “Sign Off and Review” link in the left column of the Form

#### VCR Center Routes

VCR Center routes are automatically added based on the selection of a VCR Center on the Routing Form page 1.