**Onboarding Timeline**

Meetings are in UTWR - 517 unless otherwise noted

Week 1

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| **Topic** | **Goals** | **Time** | **Attendees Needed** |
| **Monday, September 17, 2018** | | | |
| Grants & Agreements Onboarding Kick-off | * Introductions * Review Project Approach * Review Onboarding Timeline * Review Project Goals & Responsibilities | 1:00pm – 2:00pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff * Grants Accounting Staff |
| Grants Navigation & Roles Overview | * Basic Navigation Overview * Inbox vs Workspace * Roles Overview | 2:00pm – 2:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff * Grants Accounting Staff |
| Funding Proposal | * Funding Proposal SmartForm | 2:30pm – 4:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| **Wednesday, September 19, 2018** | | | |
| Funding Proposal | * Funding Proposal SmartForm | 8:30am – 10:30am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| Budget | * Create Budget (Sponsored, Sub, Cost Share) | 10:30am – 12:00pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| **Wednesday, September 19, 2018** | | | |
| Budget | * Create Budget (Sponsored, Sub, Cost Share) | 1:00pm – 2:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| Funding Proposal | * Funding Proposal Workflow * Funding Proposal Activities * Funding Proposal Notifications | 2:30pm – 4:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| **Thursday, September 20, 2018** | | | |
| Funding Proposal | * Funding Proposal Workflow * Funding Proposal Activities * Funding Proposal Notifications | 8:30am – 10:00am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| SF424 | * SF424 Functionality | 10:00am – 12:00pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |

Week 2

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| **Topic** | **Goals** | **Time** | **Attendees Needed** |
| **Monday, September 24, 2018** | | | |
| Funding Proposal | * Review Homework #1 * Funding Proposal / Budget Simulation | 1:00pm – 2:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| SF424 | * Review SF424 Functionality | 2:30pm – 3:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| Pending Sponsor Review | * Pending Sponsor Review Workflow * Pending Sponsor Review Activities * Pending Sponsor Review Notifications | 3:30pm – 4:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| **Tuesday, September 25, 2018** | | | |
| Awards | * Award SmartForm | 1:00pm – 3:00pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| **Wednesday, September 26, 2018** | | | |
| Funding Proposal / Budget / Pending Sponsor Review | * Q/A Sessions * Demo Additional Scenarios | 11:00am – 12:00pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Grants Accounting Staff |
| Awards | * Award SmartForm | 1:00pm – 2:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Grants Accounting Staff |
| Awards | * Award Workflow * Award Activities * Award Notifications | 2:30pm – 4:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Grants Accounting Staff |
| **Thursday, September 27, 2018** | | | |
| Subawards | * Subaward SmartForm | 8:30am – 10:00am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Grants Accounting Staff |
| Subawards | * Subaward Workflow * Subaward Activities * Subaward Notifications | 10:00am – 12:00pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Grants Accounting Staff |

Week 3

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| **Topic** | **Goals** | **Time** | **Attendees Needed** |
| **Wednesday, October 3, 2018** | | | |
| Awards / Subawards | * Awards / Subawards Simulation | 1:00pm – 2:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| Renewal Proposal | * Renewal SmartForms | 2:30pm – 4:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| **Thursday, October 4, 2018** | | | |
| Continuation Proposals | * Continuation SmartForm | 8:30am – 10:00am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| Continuation Proposals | * Continuation Workflow * Continuation Activities * Continuation Notifications | 10:00am– 11:30am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| Award Mod Requests | * Award Mod Request SmartForm * Award Mod Request Workflow * Award Mod Request Activities * Award Mod Request Notifications | 1:00pm – 3:00pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| **Friday, October 5, 2018** | | | |
| Award Modifications | * Award Modification SmartForm | 8:30am– 10:30am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| Award Modifications | * Award Modification Workflow * Award Modification Activities * Award Modification Notifications | 10:30am– 12:00pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |

Week 4

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| **Topic** | **Goals** | **Time** | **Attendees Needed** |
| **Monday, October 8, 2018** | | | |
| Renewals / Continuations / Award Modifications | * Simulation | 1:00pm – 3:00pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| Awards / Subawards / Renewals / Continuations / Award Modifications | * Q/A Sessions * Demo Additional Scenarios | 3:00pm – 4:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| **Tuesday, October 9, 2018** | | | |
| Log Correspondence Activity | * Review how to log communication w/sponsor outside the system * Review how to set reminders | 1:00pm – 1:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| Reports | * Funding Proposal Reports | 1:30pm – 3:00pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team |
| Reports | * Funding Award Reports | 3:00pm – 4:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team |
| **Wednesday, October 10, 2018** | | | |
| Grants Settings | * Review Grants Settings | 8:00am – 9:30am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team |
| Integrations | * Review integration w/Huron IRB | 9:30am – 10:30am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * IRB Team |
| Integrations | * Review integration w/CITI | 10:30am – 11:30am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team |
| **Thursday, October 11, 2018** | | | |
| Follow-Up | * Follow-up sessions, as needed | 8:30am – 12:00am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff * Grants Accounting Staff |

Week 5

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| **Topic** | **Goals** | **Time** | **Attendees Needed** |
| **Monday, October 15, 2018** | | | |
| Agreements Overview | * Overview * Definitions / Terminology * Workspace vs. Inbox * Security / Roles | 1:00pm – 2:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| Agreements | * Creating an Agreement * Agreements SmartForm | 2:30pm – 4:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| **Tuesday, October 16, 2018** | | | |
| Agreements | * Agreements Workflow * Agreements Activities * Agreements Notifications | 8:30am – 10:30am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| Agreements Settings | * Review Settings in Agreements | 10:30am – 12:00pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| **Wednesday, October 17, 2018** | | | |
| Amendments | * Creating an Amendment * Amendment SmartForm | 8:00am – 9:00am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| Amendments | * Amendments Workflow (Approving vs. Activating) * Amendments Activities * Amendments Notifications | 9:00am – 11:00am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| DocuSign | * Demo of DocuSign Functionality | 10:30am – 12:00pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| **Thursday, October 18, 2018** | | | |
| Email Catcher | * Review Email Catcher Functionality | 8:30am – 9:30am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| Reports | * Review Agreements Reports and determine if additional reports are needed * Homework #1 | 9:30am – 11:30am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |

Week 6

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| **Topic** | **Goals** | **Time** | **Attendees Needed** |
| **Monday, October 22, 2018** | | | |
| Agreements | * Simulation | 1:00pm – 3:00pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| Agreement Types | * Review Requirements for Additional Review Types and New SmartForm Views | 3:00pm – 4:30pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| **Tuesday, October 23, 2018** | | | |
| Agreement Types | * Review Requirements for Additional Review Types and New SmartForm Views | 1:00pm – 3:00pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| Integration | * Review Integration w/Grants * CPIP | 3:00pm – 4:30am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff |
| **Wednesday, October 24, 2018** | | | |
| Integration | * Define Need for Integration w/Cobblestone | 8:30am – 10:30am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff * UCF Legal Team |
| Agreements / Amendments | * Q/A Sessions * Demo Additional Scenarios | 10:30am – 12:00pm | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff * UCF Legal Team |
| **Thursday, October 25, 2018** | | | |
| Follow-Up | * Follow-up sessions, as needed | 8:30am – 12:00am | * Contracts & Grants Leadership Team * Grants Accounting Leadership Team * Contracts & Grants Staff * Grants Accounting Staff |