**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
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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
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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
 |