# Table of Contents

Introduction to Razor\ Grant ................................................................. 2

Logging In ........................................................................................................ 3

STEP 1 – Creating a Proposal Document in Razor\ Grant ................................ 4
   The Proposal Process.................................................................................... 4

STEP 2 – Working with Grants Specialist ..................................................... 12

STEP 3 – Routing and Approving in Razor\ Grant ........................................ 13
   The Proposal Process.................................................................................... 13

Tracking Proposal Approval Progress ......................................................... 16

Quick Review ................................................................................................. 17
INTRODUCTION TO RAZORGrant

RazorGrant is an electronic system to create, route, and approve your proposal without leaving your computer. This guide was created to assist you with this process.

Some terms that you may not be familiar with used in this guide are:

- **Action List**: This is a list of all of your pending projects – proposals that are still in progress and proposals that require your approval.

- **Document Number (DN)**: The number that is electronically assigned by the system. This is found at the top right corner of the proposal screens. While you are working on your proposal, it is listed in your “Action List.” You may also search for your proposal using this number.

- **Tab**: Similar to Post-It flags. Tabs are found at the top of the proposal screen. They are individual sections of the proposal process.

- **Panel**: Similar to file folder tabs. Panels are found within each tab section. They have additional information that may be required to be completed. Panels can be shown or hidden, expanded or collapsed.
LOGGING IN

From any Internet browser, go to http://razorgrant.uark.edu. You will be redirected to a red UARK Central Login screen and the website will be listed at the top in a yellow bar.

To log in, use your UARK ID (your e-mail address without the “@uark.edu”) and your password.

Internet Explorer 9 users only:

Internet Explorer 9 needs to be in Compatibility Mode before you log in for RazorGrant (and many other websites) to work.

Look for the icon in the address bar that looks like a torn sheet of paper. Click on that icon and it will glow blue; you are now in compatibility mode and RazorGrant will work perfectly.

You can also use another browser. RazorGrant works without problem in Internet Explorer 8, Internet Explorer 10 and later, Chrome, Mozilla, and Safari.
STEP 1 – CREATING A PROPOSAL DOCUMENT IN RAZORGrant

The Proposal Process

From the Researcher TAB, click on “Create Proposal”

- Create Proposal
- Proposals in Route
- All My Proposals
- Create Proposal For Grants.gov Opportunity
Starting on the **Proposal** TAB, complete the first six items in the “Required Fields for Saving Document” PANEL:

1. Proposal Type (usually New)
2. Activity Type (Construction, Instruction, Other, Research)
3. Project Title (Scientific or Technical title – 81 characters or less)
4. Sponsor code (If needed, search by clicking ![Magnifying Glass Icon])
   
   → To find your sponsor, please enter part of the sponsor name in the “Sponsor Name” box, using the wildcard of * before and after the partial name.
   
   → If you cannot find the sponsor in the Sponsor Lookup, please search for “Sponsor to be entered” (code number 100085). Click the “return value” link and ask your Grants Specialist to add your sponsor.

When you click “return value,” you will be back on the Proposal TAB. Continue entering:

5. Project Start Date (Enter or use Calendar ![Calendar Icon])

6. Project End Date
Navigate to the “Sponsor & Program Information” PANEL, and click “show” to display.

Then enter:

1. Sponsor Deadline Date
2. CFDA number

Click “Save” at the bottom of the screen and your proposal is created in RazorGrant!
Here is what the proposal tab looks like when you have completed the required information:

<table>
<thead>
<tr>
<th>Required Fields for Saving Document</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Proposal Number:</strong></td>
</tr>
<tr>
<td><strong>Proposal Type:</strong></td>
</tr>
<tr>
<td><strong>Lead Unit:</strong></td>
</tr>
<tr>
<td><strong>Activity Type:</strong></td>
</tr>
<tr>
<td><strong>Project Title:</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Institutional Fields Conditionally Required</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Award ID:</strong></td>
</tr>
<tr>
<td><strong>Original Institutional Proposal ID:</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sponsor &amp; Program Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sponsor Deadline Date:</strong></td>
</tr>
<tr>
<td><strong>Sponsor Deadline Type:</strong></td>
</tr>
<tr>
<td><strong>Name:</strong></td>
</tr>
<tr>
<td><strong>ID:</strong></td>
</tr>
<tr>
<td><strong>NSF Science Code:</strong></td>
</tr>
<tr>
<td><strong>Sponsor Div Code:</strong></td>
</tr>
<tr>
<td><strong>Anticipated Award Type:</strong></td>
</tr>
<tr>
<td><strong>Agency Routing Identifier:</strong></td>
</tr>
<tr>
<td><strong>Opportunity Title:</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Organization/Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery Info</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Keywords</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>
Navigate to the **Key Personnel** TAB

Use the “Add Key Person” search to identify the PI and Co-PIs for this proposal

1. Click on the icon next to Employee Search → NOTE: Non-employees are not added to your RazorGrant proposal at this time.
2. Search for the UA employee you wish to add by typing in his/her last name and clicking on search. Once found, click on “return value”.

![Add Key Person search interface]

One item retrieved.

<table>
<thead>
<tr>
<th>Return Value</th>
<th>KcPerson Id</th>
<th>Full Name</th>
<th>User Name</th>
<th>Email Address</th>
<th>Directory Department</th>
<th>Directory Title</th>
<th>Office Location</th>
<th>Office Phone</th>
<th>School</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>return_value</td>
<td>100001</td>
<td>Test Person</td>
<td><a href="mailto:test1@email.edu">test1@email.edu</a></td>
<td>MASC</td>
<td>Assistant Professor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Yes</td>
</tr>
</tbody>
</table>
3. Choose the proper Proposal Role from the drop-box
   → The drop-box contains the roles “Principal Investigator,” “Co-Investigator,” and “Key Person.”
   ⇒ If you have a Key Person, you will be required to enter a text description (i.e., “Senior Personnel”) for that individual
4. Click “add person”

5. Repeat steps 2 to 4 for each Co-PI and Key Person.
6. For yourself only, answer your Proposal Person Certification questions by clicking “show” next to your name, then “show” next to “Proposal Person Certification (Incomplete)”

7. If you have co-PIs or Key Persons, you will need to let them know that they need to certify this proposal
   → Your Grant Specialist must first add them to the Permissions TAB before they can access the proposal.
Navigate to the Questions TAB

1. Click “expand all” and answer all the questions

2. Click “save”
3. Locate and note your Document Number from the upper right hand side of your screen

4. Send this DN to your Grant Specialist so that he/she can assist you with the remainder of your proposal
5. Click “close” at the bottom of the screen to exit the document
   a. If you close your browser instead of using the “close” button, you will lock the document and no one else will be able to answer certification questions or edit until it is unlocked
   b. You may either re-enter the document from your Action List and then “close,” or you may contact your Grant Specialist to unlock the document
STEP 2 – WORKING WITH GRANTS SPECIALIST

Continue working with your Grants Specialist to finalize the budget and proposal documents required by the Sponsor for submission. Final proposal documents should be submitted 5 days prior to Sponsor deadline to allow time for review, routing, and approval.

Benefits to early submission:

- 14 days prior to Sponsor deadline: If available, Hanover Grants can provide a review of your proposal by a technical expert.

- 5-14 days prior to Sponsor deadline: RSSP Grants Specialist can provide a thorough comparison of the submission requirements against the final proposal. They can also provide thorough review of the proposal budget to ensure that the budget is allowable, allocable, and reasonable.

- 2 days prior to Sponsor deadline (for Grants.gov submissions): Allows Grants.gov time to validate and allow for revision and resubmission if necessary.

Your Grant Specialist will:

- Work with you and answer your questions
- Help you interpret the solicitation
- Review the files you provide to him or her via e-mail
- Enter additional information into RazorGrant:
  - Add permissions for those listed on the Key Personnel TAB so that they can complete their certifications
  - Add your proposal and related Word, Excel, or PDF documents to the Abstracts and Attachments TAB
  - Add your budget to the Budget Versions TAB
  - Let you know when RazorGrant is ready for you to submit into routing for approval
- Obtain the AOR (authorized organizational representative) signature for your proposal
- Submit the final, official proposal to the sponsoring agency
STEP 3 – ROUTING AND APPROVING IN RAZORGRANT

The Routing and Approval is the next phase of RazorGrant. Routing and Approval takes place after the proposal is complete and ready for submission.

The Proposal Process

Routing and Approval

From the Researcher TAB:

1. Click on the “action list” button
2. Once in the Action List, click on the ID for the proposal you wish to submit

It will take you back into your proposal.
Navigate to the Proposal Actions TAB:

1. On the “Data Validation” PANEL click “show”
2. Click turn on validation

3. Fix Validation Errors, if any
   → You will not be able to submit into routing until all errors are fixed
   → If you are submitting on the same day the proposal is due, there will be a WARNING that the proposal is past the sponsor date; this is a quirk of the system and can be ignored.
4. Click on the “submit” button at the bottom of the screen
   → DO NOT hit the “cancel” button during proposal development. Selecting “cancel” stops the process, and you will be required to start over with a new proposal development document.
   → During Routing, if changes are found to be needed, the proposal may need to be sent through the Routing process again.
5. If you are submitting into routing on your deadline date, you will see a statement regarding submittal; answer “YES”

   Validation Warning Exists. Are you sure want to submit to workflow routing.

   ![Yes/No button]

6. Answer “NO” to the question “Do you want to receive future approval requests?”
   → This will automatically approve the proposal so that you do not have to return to the proposal again during routing

   Do you want to receive future approval requests?

   ![Yes/No button]

7. Click “close” on the bottom of the screen
8. Contact your Co-PIs to request that they access the proposal from their Action Lists and approve the proposal
9. After your Co-PIs have completed their approvals, notify your Department Chair and Dean that the proposal is now on their Action Lists for review and approval

You have completed the creation of your proposal and have successfully submitted it into routing!
TRACKING PROPOSAL APPROVAL PROGRESS

From the Researcher TAB:

1. Click on the “doc search” button
2. Enter your document number into the Document ID box and click “search”

3. Click on the Route Log icon
4. “Actions taken” show who has approved
5. “Pending Action Requests” lists on who’s Action List the proposal is currently waiting
6. “Future Action Requests” displays the routing stops
QUICK REVIEW

Step 1:
  1. Enter the following on the Proposal TAB:
     a. Proposal Type
     b. Activity Type
     c. Project Title
     d. Sponsor Code
     e. Project Start Date
     f. Project End Date
     g. Sponsor Deadline Date
     h. CFDA number
  2. On the Key Personnel TAB:
     a. Add PI, Co-PIs, and Key Persons
     b. Answer your Proposal Person Certification questions
  3. On the Questions TAB:
     a. Answer all questions
  4. Note the Document Number, and send to your Grant Specialist
  5. Save and close the proposal

Step 2:
  1. Work with your Grant Specialist to complete the proposal
  2. Provide final versions 5 days prior to Sponsor deadline date

Step 3:
  1. On the Proposal Actions TAB:
     a. Turn on validation
     b. Fix any errors
     c. Click on the submit button
     d. Answer “NO” to “Do you want to receive future approval requests?”
     e. Click on the close button
  2. Notify your Co-PIs, Chair, and Dean that the proposal is on or will soon be on their action lists