

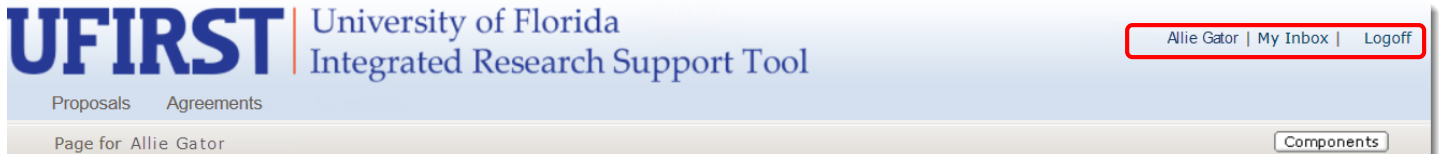
## How Do I Navigate and Search UFIRST?

UFIRST is a powerful tool with several navigation and search features.

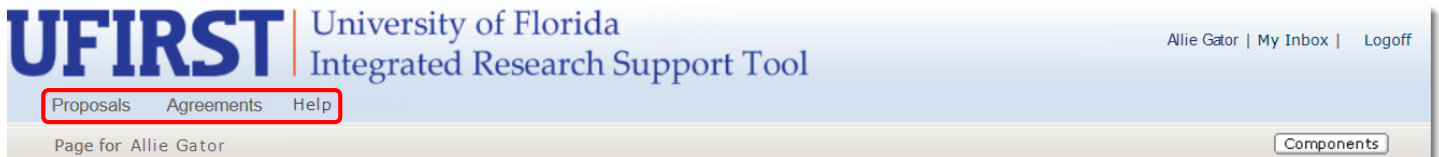
### Navigating UFIRST

#### Primary Menus

- UFIRST has two primary menus found on the top of the screen, **User Menu** and **Main Menu**.
- The User Menu allows the user to access the user's **Profile**, **My Inbox** and the **Logoff** button.



- The Main Menu allows the user to access the Proposals and Agreements Worklists as well as additional Help features.



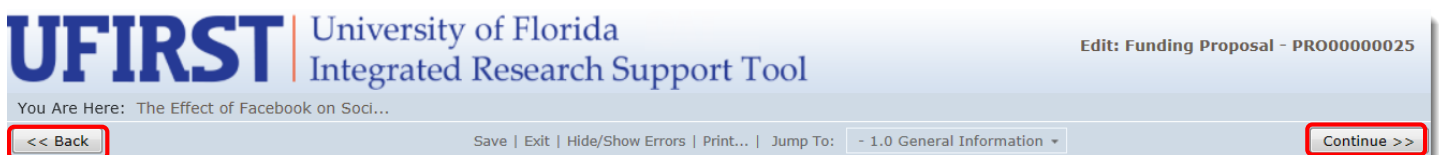
#### Breadcrumbs

- Breadcrumbs provide a trail for the user to follow back to a starting point within the system. The breadcrumb is arranged as Home page > Section Page > Subsection Page.
- Breadcrumbs are also used in SmartForms. Each of the links in the SmartForms can be clicked on to navigate to a previous section.



#### SmartForms Menu

- In addition to the breadcrumbs, the SmartForm sections have a top screen navigation that includes a Jump To menu.
- When editing a SmartForm (e.g., Funding Proposal) navigation is controlled by both the system **Back** and **Continue** buttons. Do NOT use browser controls to navigate within UFIRST as these types of controls do not save your work.



*Jump To Menu*

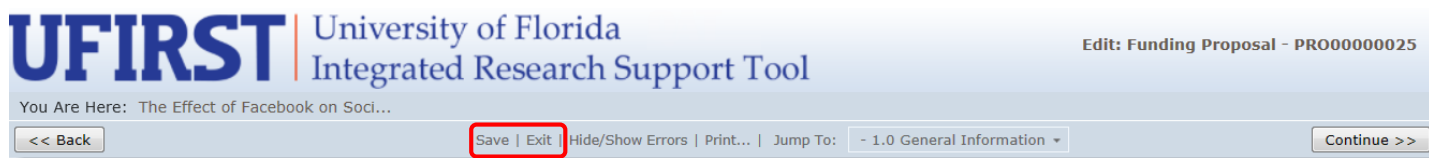
- The **Jump To** menu allows you to navigate directly to a specific page in the SmartForm. This is convenient when you are editing information on an already completed SmartForm.
- The Jump To menu is available in all Smartform and Budget Grid sections.



*Save and Exit*

The SmartForm navigation controls also allow you to Save, Exit, Hide/Show Errors, and Print the screen you are viewing.

- The **Save** link in the SmartForm menu allows you to save your work at any time during the completion process.
- When you click the **Save** link, it acts as a refresher of the information entered or updated. It will also recalculate figures on the budget grids.
- **Exit** closes the current section of the SmartForm while returning you to the appropriate workspace.
- You can select to exit and save changes or exit and ignore changes when you click this link.

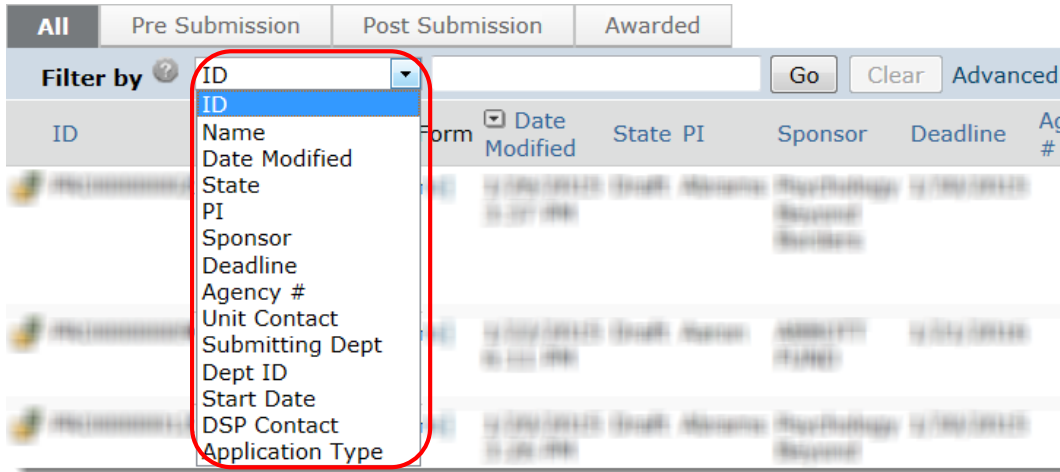


**Search Features**

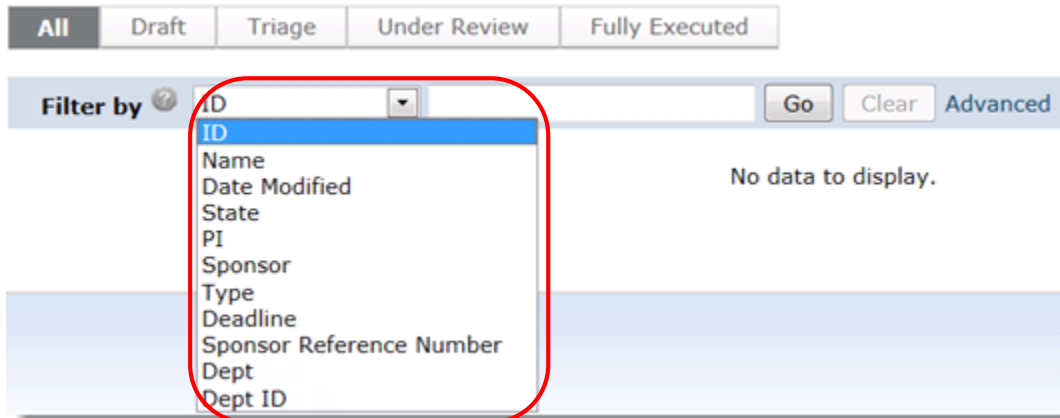
- There are search functions throughout UFIRST that will facilitate locating a proposal or agreement, names of personnel, departments, and sponsors.
- All search options have Wildcard (%) and Type-ahead features.
  - The Wildcard feature allows you to do a search when you are not certain how the information is stored in the system. By default, UFIRST assumes that you are searching for text that **Begins with** the text you type. If you are looking for text that is contained anywhere in the field, type % then the information you are looking for. A best practice is to ALWAYS use the % when using search boxes.
  - The Type-ahead feature displays potential matches as you begin typing in the text box provided.
- In the **My Inbox**, **Proposals**, and **Agreements** tab there is a Filter By field that allows you to search by a specific category.

*Worklists*

- This section contains lists of all records in UFIRST (Proposals only in the Proposals Worklist, Agreements only in the Agreements Worklist).
- In the **Proposals** tab, you can locate proposals by using any of the following criteria:



- In the **Agreements** tab, you can locate agreements by using any of the following criteria:



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