

## Navigation and Basic Tasks 10.0

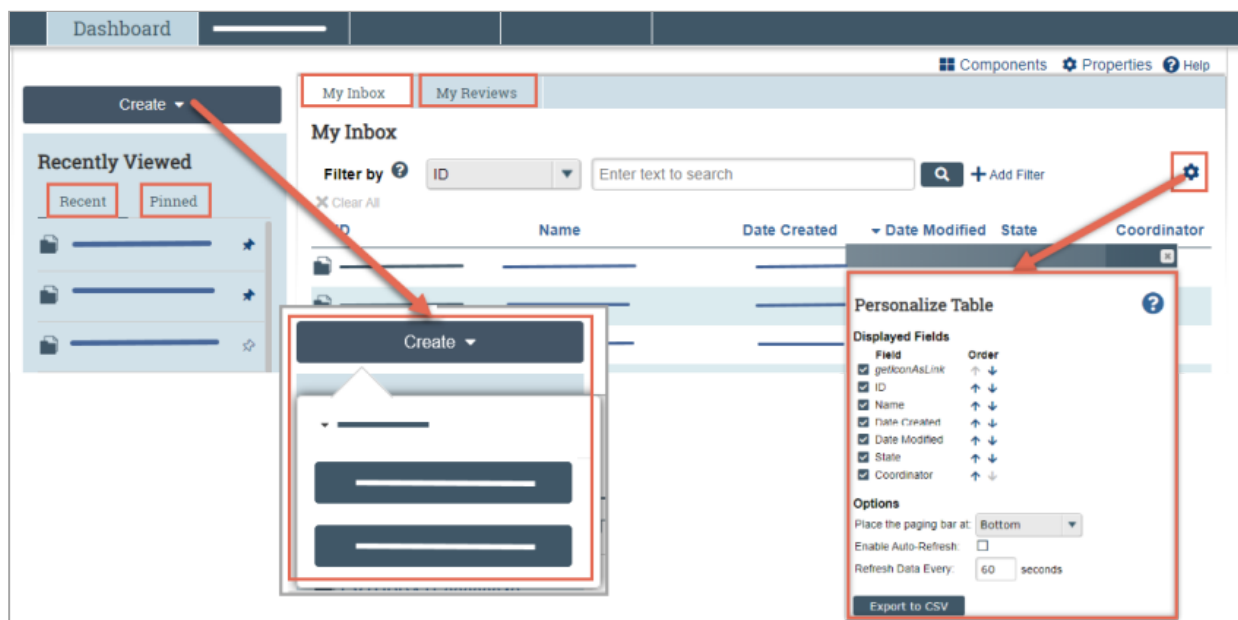
### Show me: [Basic Navigation](#)

When you first log in, you will be on your Dashboard, which is the starting point for finding items and performing many basic tasks.

#### To find key items

From your Dashboard, you will see:

- **My Inbox:** Items that require you to take action.
- **My Reviews:** Items assigned to you to review. These are a subset of the items in My Inbox.
- **Create menu and buttons:** Actions you can perform. The menu will not show if you do not have access to any buttons.
- **Recently Viewed:**
  - **Recent:** The last several items you viewed. Scroll through this list to find an item you worked on recently.
  - **Pinned:** You can pin the items in Recently Viewed section for quick and easy access. This is where those pinned items are listed.
- **Personalize Table:** You can alter the tables displayed on the dashboard by using the Personalize Table gear icon.



#### To identify what action is needed

1. Review the state column of records in My Inbox.

The state gives a clue as to what to do next. For example, "Department Review: Response Pending from PI" means the department reviewer is waiting for you to respond to review comments they made on a funding proposal. You can open it, and make any needed changes, and then resubmit it to the department reviewer.

ID	Name	Date Created	Date Modified	State
				Department Review
				Department Review: Response Pending from PI
				Specialist Review

### To open a record awaiting your action

1. From My Inbox, click the record name.
2. The workspace for the record opens.

**Tip:** A list of activities you can perform appears on the left.

### To view record history

1. From the record workspace, click the **History** tab.
2. The history lists the actions performed on the record to date, including comments or generated documents added.

### To find a funding proposal not on the Dashboard

1. In the Top Navigator, click **Grants**.
2. In the Sub-Navigator, click either **Funding Proposal** or **Complex Projects**, depending on the type of proposal you're looking for.
3. To further narrow your search, you can:
  - a. Sort the records in various ways by clicking the column headings.
  - b. Filter the records by name, state, or other attributes, using the filter tool at the top of the list. See [Find Data by Filtering 10.0](#).
4. Click the name of the desired funding proposal.  
The proposal workspace opens.