



Progress Report Submission Guide

For Principal Investigators (Authorized Official role in OGX)

Version: 2020-11-20



About this guide

Purpose of this guide

The Progress Report Submission Guide for Principal Investigators contains information about uploading progress reports on the Oklahoma Grant Exchange – OGX website. Progress report formatting instructions are found on the Progress Report Page in OGX (see step 6 in "Upload progress report" section in this guide).

Users of this guide

Principal Investigators of OCAST projects (Authorized Official role in OGX)

Types of progress report submissions and deadlines

Progress report deadlines are provided in the current year project contract, unless otherwise provided as a result of a contract modification altering the contract end date. Progress report deadlines are strictly enforced; failure to submit progress reports by the deadline may result in project termination, deobligation of remaining funds, and ineligibility for future OCAST funding opportunities.

There are three types of progress reports:

- Annual progress reports
 Submitted 60 days prior to the end of each year of your project, except for the last year
- Final progress reports
 Submitted 30 days after the end of the final year of your project
- Interim progress reports
 Submitted as part of a contract modification request, or for mid-year updates when required

Please help us improve OGX with your feedback by completing our OGX Feedback Survey

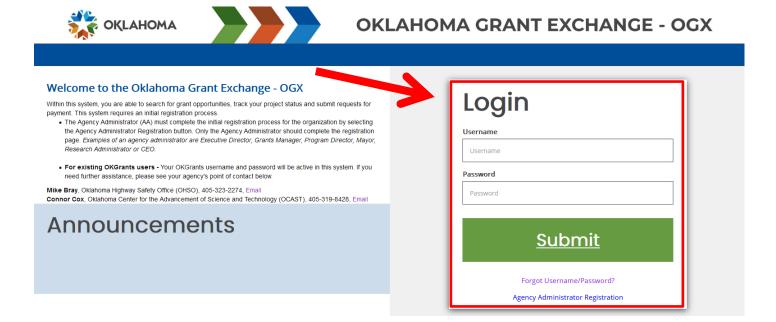
Login to your OGX account

To access the OGX system, go to https://www.ogx.ok.gov. Enter your username and password associated with your Authorized Official role and then click the **SUBMIT** button.

NOTE: If you have an existing user account in OKGrants, then you may login to OGX using your OKGrants User Name and Password. Upon login you may be asked to change your password; you may use the same password without issue. Be aware that the OGX portal does not save your User Name and Password. However, this option may be available for some browsers.



IMPORTANT: Only the Principal Investigator (Authorized Official role) may initiate and submit a progress report.

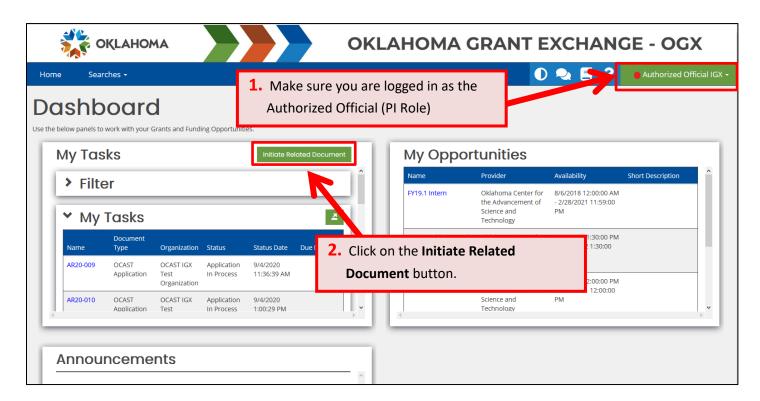


NOTE: If you do not remember your password, click the Forgot Username/Password? link and follow the instructions to have a new temporary password sent to you by the OGX system. If you are copying and pasting the temporary password from the OGX system email to the OGX site, please make sure that you are not copying an extra space when pasting the temporary password or else you will see an error message. If necessary, type enter the temporary password manually. Upon login, enter your new password in your profile page and save.

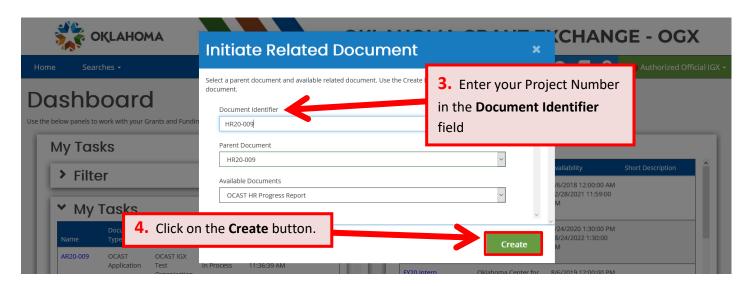
If you have attempted multiple login attempts and have been locked out of the system, please contact OCAST for assistance.

Upload your progress report

- 1. From the Home page "Dashboard," confirm that you are logged in as an Authorized Official (PI) and
- 2. Click the Initiate Related Document button.



- 3. Enter your Project Number in the **Document Identifier** field. The resulting **Parent Document** field should match, and the **Available Documents** field will show the associated Progress Report available.
- 4. Click the Create button.

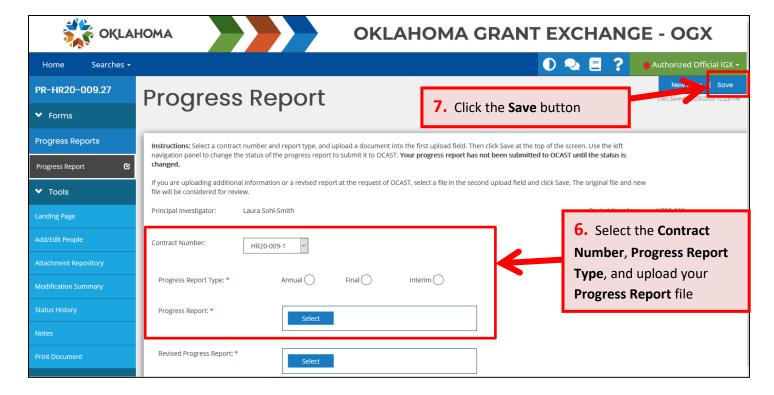




5. A Progress Report document is created and you will see its Document Landing Page. It is within this document that you will upload your progress report. In the navigation pane on the left, Click on **Progress Report.**



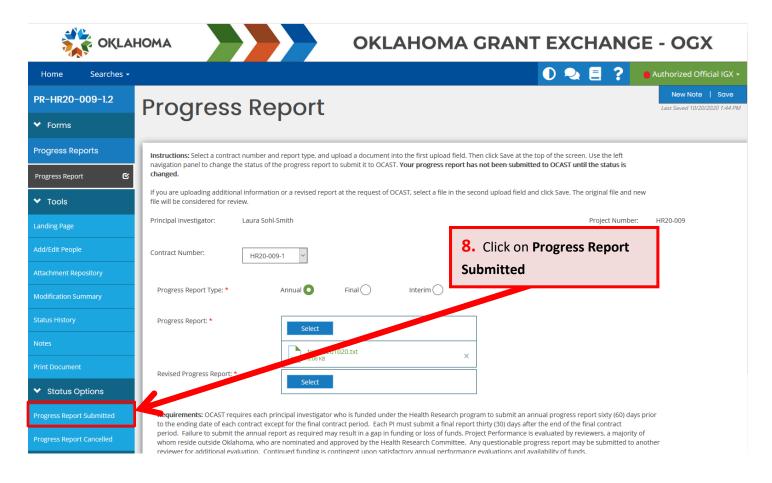
- 6. In the Progress Report page, select the current year **Contract Number** from the dropdown list, select the **Progress Report Type** (Annual, Final, or Interim) and click the **Select** button to upload your progress report file.
- NOTE: Progress report formatting guidelines are found on this page.
- 7. Click the **SAVE** button. OGX will notify you if any page errors are found. All errors must be addressed before proceeding.



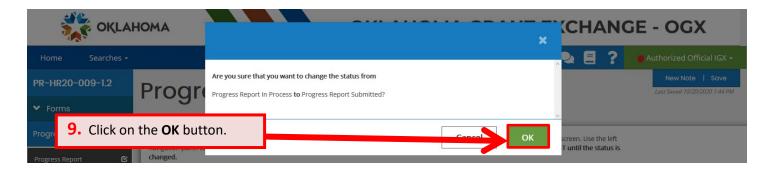


After saving, OGX will assign a unique, permanent document number to this progress report document; in this example, "PR-HR20-009-1.2" All progress report documents will have document numbers beginning with "PR-[...]" "

8. In the navigation pane on the left, click on Progress Report Submitted.

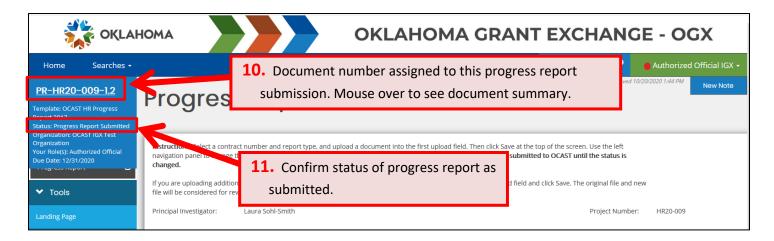


9. Click **OK** to confirm the status change of the Progress Report document.





- 10. Confirm that your progress report was successfully submitted by hovering the mouse pointer over the document number and
- 11. In the resulting info tip, confirm "Status: Progress Report Submitted."



Congratulations! Your progress report is now submitted.

One of the primary reviewers of your application will evaluate your progress report and complete an evaluation form in OGX. The evaluation process typically takes 2-3 weeks, and when completed you will receive a notification email from OGX.

