

InfoEd: Introductory Proposal Development

In this introductory session, attendees will learn the “shortcut” approach to creating a proposal record in InfoEd. Topics covered include initiating the creation of a new InfoEd proposal record, adding project personnel, entering total project direct and indirect costs, uploading proposal materials and routing the proposal for internal approval. Upon completion of this class, attendees will receive access to prepare proposals in InfoEd. Note: The InfoEd proposal entry shortcut approach detailed below can be used for all proposals that are *not* system-to-system (S2S) Grants.gov applications. S2S Grants.gov applications are Grants.gov applications completed directly in InfoEd using InfoEd’s Grants.gov application template and submitted through Grants.gov from InfoEd. They are not Grants.gov applications that utilize the interactive PDF application template downloaded from Grants.gov.

Step-By-Step Instructions

1. Log into InfoEd

- <https://unrprod.infoedglobal.com/>

2. Create Proposal

- Select “My Proposals”
- Select “Create New Proposal”



3. Complete “New Proposal Questionnaire”

- Step 0: If PI listed is correct, continue to next step. If PI listed is incorrect, click the “Change PI” button and choose PI from alpha directory. To locate personnel, click letter of last name, make pick list selection, then click “Select.”
- Step 1: Select “Create a New Proposal” and click the "Continue to Next Step" button.

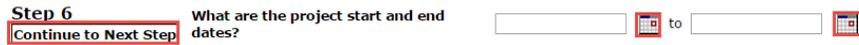
A screenshot of the 'New Proposal Questionnaire' Step 1. The title is 'New Proposal Questionnaire ?'. Step 0 asks to confirm the PI of the proposal to be 'Investigator, Pete' or to click a 'Change PI' button. Step 1 asks to 'Create a "New" Proposal or "Copy From Existing"?'. There is a 'Continue to Next Step' button on the left and a 'Do you want to...' dropdown menu on the right with options 'Create a New Proposal' and 'Copy From Existing Proposal'.

- Step 1 Continued: Select “Setup Proposal Manually,” and click the “Continue to Next Step” button.

A screenshot of the 'Step 1 Continued...' dropdown menu. It shows a list of options: 'Select from Grants.Gov Opportunities', 'Select from Grants.Gov Opportunities', 'Select from all SPIN Opportunities', and 'Setup Proposal Manually' (highlighted with a blue box). There is also a 'Continue to Next Step' button.

- Step 2: Select proposal type from pick list, and click the “Continue to Next Step” button.
- Step 3: Select sponsor from alpha directory. Locate sponsor by clicking first letter of sponsor name, make pick list selection, and click the “Continue to Next Step” button. Note: If unable to locate sponsor, please contact your pre-award research administrator in the Office of Sponsored Projects.
- Step 5: Enter proposal title in field provided, and click the “Continue to Next Step” button.

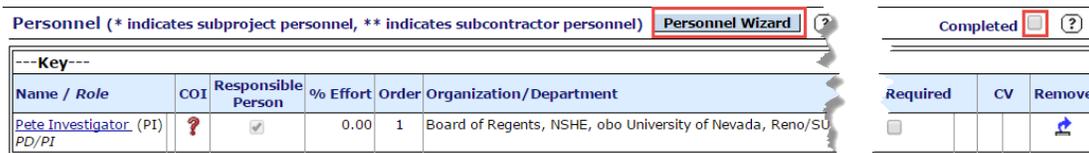
- Step 6: Enter project start and end dates in fields provided or select dates via the calendar icon.



- Step 7: Select "1" budget period from the pick list, and click the "Continue to Next Step" button.
- Review proposal information. If proposal information thus far is correct, click the "Yes, Create Proposal button." If corrections are needed, click the "No, Go back and make changes" button, make necessary changes and continue through until you are able to click the "Yes, Create Proposal" button.
- Step 8: Answer all questions on the "Setup Questions" screen, and then click the "Save and Continue" button towards the bottom on the screen.

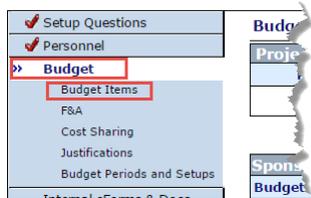
1. Personnel

- Using the "Personnel Wizard" button, add all remaining UNR key, named personnel one by one (the principal investigator will already be listed). It is not necessary to add TBD graduate students or undergraduates to this section or anyone else who is not key to the project.
- Check the "Completed" box in the upper right area of the screen when finished.



2. Budget

- Select "Budget" from left side menu, and then select "Budget Items."



- In the "Non-Personnel Costs" section of the screen, click the button labeled, "Click to add."



- You should now be on the "Budget Detail" screen where you will enter project total direct costs. In the "Description" field, type in "Total Direct Costs," and then select "Other Costs" from the "Sponsor Budget Category" picklist.



- In the "Purchase/Usage Schedule" are of the screen, use each row to enter total project costs for each budget period. Leave the "Units/Qty" at "1," and enter the total direct cost figure for the entire project period in the corresponding "Price/Charge Each" field. The "Charge Start Date" should already reflect the project start date, but enter the project end date in the "Charge End Date" field. Then, click the "Save" button in the upper left of the screen to save your changes.

Purchase/Usage Schedule ?				
Units/Qty	Price/Charge Each	Total	Charge Start Date	Charge End Date
1	150,000.00	150,000.00	01-Jul-2016	30-Jun-2018

- Next, return to the "Budget Items" screen by selecting it from the left side menu. The total direct cost figures entered on the previous screen should now appear in the "Non-Personnel Costs" area of the screen and correspond to their respective budget period. To continue, check the completed box in the upper right corner of the screen.

Budget Items ?		Completed <input checked="" type="checkbox"/> ?		
<i>"Initial" Budget Version</i>				
		Period 1	Total	
Personnel Costs				
Open	Name / Role	Type	Effort	
	Investigator, Pete PD/PI	Key	0.00	\$0.00
			Total	\$ 0.00
Non-Personnel Costs				
Open	Budget Category	Item		
	Other Costs	Total Direct Costs	\$150,000.00	\$150,000.00
			Total	\$ 150,000.00

F&A

- Navigate to the "F&A" screen by selecting it from the left side menu.
- Select "Manual (lump sum by period)" from the "Sponsor Calculation Method" picklist.

Facilities and Administration Costs	
Sponsor Calculation Method	
Manual (lump sum by period)	▼
Auto (predefined schemes)	
Auto (predefined bases/rates)	
Auto (line-by-line)	
Manual (lump sum by period)	
Manual (line by line)	
Directs & F&A	

- In the bottom section of the screen, enter the F&A total for project period in the box provided within the "F&A Totals" row. Then, click the "Save" button in the upper left of the screen, and check the "Completed" box in the upper right of the screen.

	Period 1
Direct Cost Totals	\$ 150,000.00
F&A Base Totals**	\$ 150,000.00
F&A Totals	65,250.00
Grand Totals	\$ 215,250.00

- Navigate to the “Cost Sharing” screen via the left side menu, and check the “Completed” box on the screen.
- Navigate to the “Justifications” screen via the left side menu, and check the “Completed” box on the screen.

3. Internal eForms & Docs

- Navigate to the “Internal eForms & Docs” screen via the left side menu.
- Open the OSP-1 form in the “Form Name” section towards the bottom of the screen.

Form Name (?)	Document Type (?)	Open Status (?)
MANDATORY - OSP-1 Transmittal Form	OSP Forms	 Incomplete

- Complete all form questions and check the “Completed” box in the upper right corner of the form when done, and the form will close, and you’ll be returned to the “Internal eForms & Docs” screen.
- Back on the “Internal eForms & Docs” screen, click “Add Institution Forms/Support Documents.” This link acts as an upload button for your proposal materials.

Form Name (?)
MANDATORY - OSP-1 Transmittal Form
Add Institution Forms/Supporting Documents

- Now, you will begin uploading your proposal documents. You will need to upload all sponsor requested materials plus any required UNR forms. At the very the least, your proposal materials will consist of the project statement of work, line-item budget and budget justification. To upload a document, follow these steps when the upload screen appears:
 1. Enter the document name in the “Name” field.
 2. Locate and select the file by clicking the “Choose File” button.
 3. Choose the type of document from the “Category” picklist.
 4. Select “Proposal Documents” from the “Folder” picklist
 5. Click the “Upload” button. Once the document has uploaded, you will see the following message in red font at the top of the upload screen: “Please click ‘close’ to complete the upload of you documents”. Once you see this message, click the “Close” button. Repeat the above process to upload further documents.

Upload [Upload](#) [Close](#)

Upload new document

Name

Location No file chosen

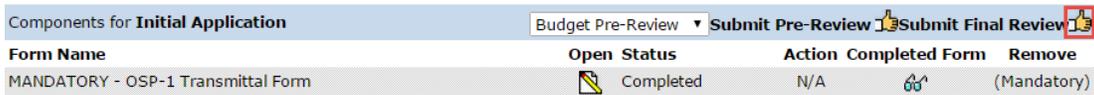
Category

Folder

After uploading all documents, check the “Completed” box in the upper right of the “Internal eForms & Docs” screen. Note: Uploaded documents will appear in the “Form Name” section on the “Internal eForms & Docs” screen.

4. Finalize and Route for Internal Review and Approval

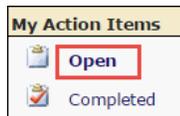
- Navigate to the “Finalize” screen.
- Click the “thumbs-up” icon to the right of the text, “Submit Final Review.”



- You must accept the certifications, so click the “Accepted” radio button at the bottom of the certifications.
- You will see the route steps appear. To activate the route, click the “Submit” button. Next, exit the proposal record by clicking the “Done” button in the upper left corner of the screen.

5. Approve Proposal

- The PI will be the first person to approve the proposal. To approve as PI, access the “My Open Action Items” screen. To do this, click “Open” underneath “My Action Items” on the right side of the main InfoEd screen.



- The screen will refresh, and you should see an item appear in the “My Open Action Items” screen. On that action item, click the yellow file folder icon.



- The reviewer dashboard will appear where you will approve your proposal. To approve the proposal, click the radio button in the green “Reviewed” column. Then, click the “Save” button in the upper right corner. Now, select a decision from the “My Decision is:” picklist. Next, accept the certifications, and then click the “Save” button in the upper right corner one last time. That’s it! You’ve just completed your proposal in InfoEd, routed it for internal review and have completed step 1 of the routing process.

