

InfoEd Proposal Development Record Guide

Last Updated: July 2025

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Purpose

This guide is intended to support principal investigators, department administrators, and coordinators in creating a new Proposal Development (PD) record in InfoEd. To submit proposals in InfoEd, users must have an active account. If you are unsure of your current access or need to request it, please contact your Grant and Contract Administrator.

Contact Information

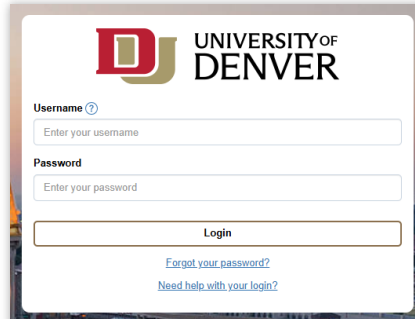
ORSP Office Email: orsp@du.edu

Find contact information for your specific Grant and Contract Administrator here:

<https://www.du.edu/orsp/spa/people>

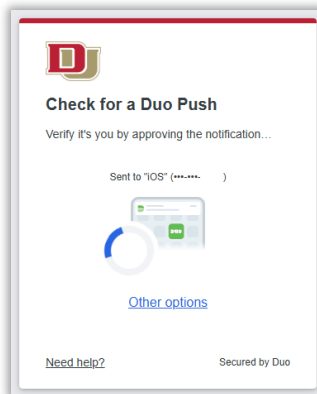
Step 1: Login to InfoEd

1. In your preferred internet browser, navigate to pioneerera.du.edu.
2. Enter your DU email address and password. Select *Log in*.



The login form features the University of Denver logo at the top. Below it, there are two input fields: 'Username' with a help icon and 'Password'. Each field has a placeholder text 'Enter your username' and 'Enter your password' respectively. A 'Login' button is positioned below the password field. At the bottom, there are two links: 'Forgot your password?' and 'Need help with your login?'.

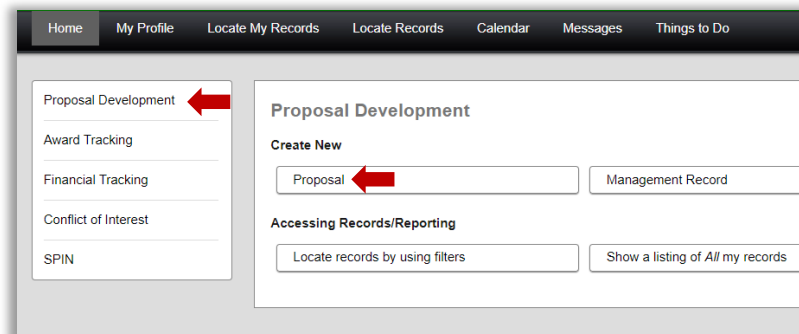
3. You will be redirected to multifactor authentication to complete the log in process.



The Duo Push screen displays the Duo logo and the title 'Check for a Duo Push'. Below the title, it says 'Verify it's you by approving the notification...'. A status bar indicates 'Sent to "iOS" (***-***-***)'. A central graphic shows a smartphone with a green checkmark and a blue circular arrow. Below this, there is a link for 'Other options'. At the bottom, there is a 'Need help?' link and the text 'Secured by Duo'.

Step 2: Create a new proposal development (PD) record.

1. Select *Proposal Development* in the sidebar of your home page.
2. Select *Proposal* under *Create New*. Your new proposal setup page will open in a new window.

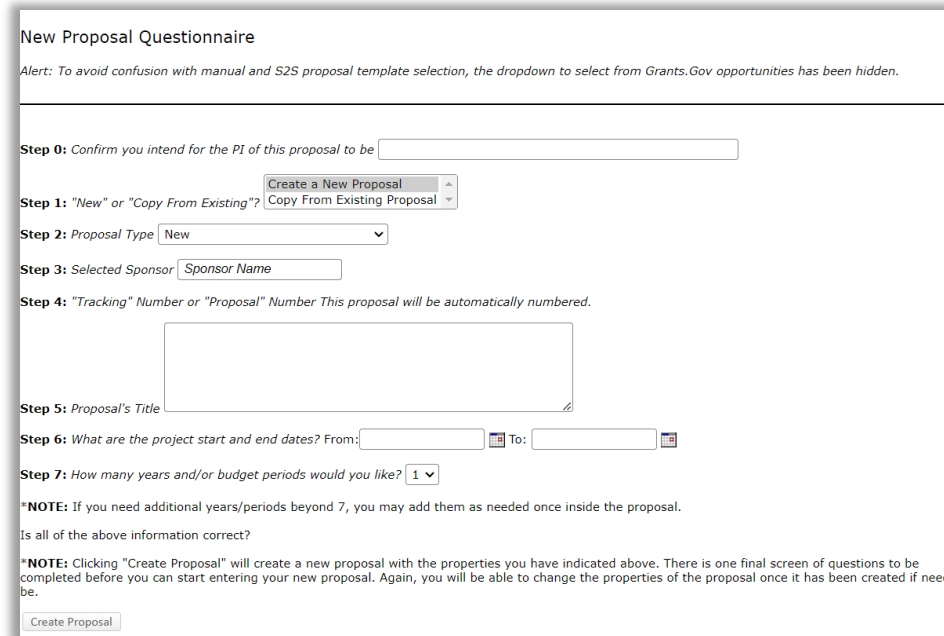


The dashboard has a top navigation bar with links: Home, My Profile, Locate My Records, Locate Records, Calendar, Messages, and Things to Do. On the left is a sidebar with a list of options: Proposal Development, Award Tracking, Financial Tracking, Conflict of Interest, and SPIN. A red arrow points to 'Proposal Development'. The main content area is titled 'Proposal Development' and contains two sections. The 'Create New' section has two buttons: 'Proposal' and 'Management Record', with a red arrow pointing to 'Proposal'. The 'Accessing Records/Reporting' section has two buttons: 'Locate records by using filters' and 'Show a listing of All my records'.

Step 3: New Proposal Questionnaire

Proposal creation in PD module involves defining some basic information that includes PI name, proposal type, sponsor name, proposal title, start and end dates, and number of periods.

Important: Never close the browser when working on the new proposal questionnaire. To ensure proper record creation, you should complete all steps and click *create proposal*. Exiting the pop-up will cancel proposal creation.



New Proposal Questionnaire

Alert: To avoid confusion with manual and S2S proposal template selection, the dropdown to select from Grants.Gov opportunities has been hidden.

Step 0: Confirm you intend for the PI of this proposal to be

Step 1: "New" or "Copy From Existing"? Create a New Proposal Copy From Existing Proposal

Step 2: Proposal Type New

Step 3: Selected Sponsor Sponsor Name

Step 4: "Tracking" Number or "Proposal" Number This proposal will be automatically numbered.

Step 5: Proposal's Title

Step 6: What are the project start and end dates? From: To:

Step 7: How many years and/or budget periods would you like? 1

*NOTE: If you need additional years/periods beyond 7, you may add them as needed once inside the proposal.

Is all of the above information correct?

*NOTE: Clicking "Create Proposal" will create a new proposal with the properties you have indicated above. There is one final screen of questions to be completed before you can start entering your new proposal. Again, you will be able to change the properties of the proposal once it has been created if need be.

Create Proposal

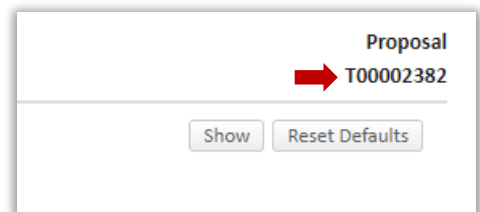
1. **Step 0:** By default, the person creating the proposal is listed as the PI. To modify this, click in the text box and begin typing the desired PI's name. Select the correct name from the search list. If the PI's name is not included in the search, contact your grant and contract administrator to add them to the database. The PI can be changed later if needed.
2. **Step 1:** Select *Create a New Proposal*. A new proposal is a blank or empty proposal. If you choose to copy from an existing proposal, a previously created proposal is used as a template, if security permits. Some information from the existing proposal will be copied into the new proposal. ORSP strongly suggests selecting *Create a New Proposal*.
3. **Step 2:** Select the type of proposal for *Proposal Type*. Similar to Step 1, the standard selection is *New* unless it falls under the other types.
4. **Step 3:** Type the sponsor's name in the search box, select the desired sponsor from the listing. If the desired sponsor does not appear in the search results, contact your grant and contract administrator to add the new sponsor to the

database. In the meantime, you can choose *Default Sponsor* and continue entering your proposal but remember to correct the sponsor's name when the new sponsor is added to the database.

5. **Step 4:** No action required. The Tracking Number or Proposal Number for a proposal will be automatically generated.
6. **Step 5:** Enter the proposal's title.
7. **Step 6:** Click the calendar icon to select project start and end dates or manually enter the dates in the format "DD-MM-YYYY". The dates can be adjusted after the proposal is created, if necessary.
8. **Step 7:** The system will automatically assign the number of budget periods based on the dates entered. The assignment is based on a full calendar year. You may adjust the number of periods in the pick list.
9. Review your responses for accuracy and select Create Proposal.
 - a. *Note: Additional budget periods may be added later in the Budget section. You will still be able to modify some of the information you entered here, after proposal creation.*
10. After you click *Create Proposal*, wait for the page to finish configuring all the steps. Once it is complete, your proposal record will be created and will automatically open in a new window.

Step 4: Setup Questions

After you click *Create Proposal*, the *Setup Questions* page will appear. From this point, the proposal record will be available in InfoEd for view/edit. You can search for your proposal in InfoEd using the proposal tracking number (found in the top, right corner of the record; TXXXXXXXX) or the PI name.



1. Submission Mechanism/Form Information: If this project is a flow through project (a subcontract or subgrant), select Yes.
2. Deadline Information: Indicate whether the submission has a deadline by selecting Yes or No. If yes, select the deadline type and enter the deadline date and time.



3. General Proposal Properties: Indicate whether your proposal will involve the use of Human Subjects and/or Laboratory Animals.
4. Budget Setup Information: Please review the program types listed below, choose an appropriate program type, and indicate whether the project is considered on or off campus. To be considered off-campus, 50% or more of the university employee personnel effort (including cost-shared effort) is performed in facilities neither owned nor leased by the University. Remote work does not qualify as off campus.

ARC-Academic Research Center: Research and scholarship activities that include rigorous inquiry, experiment, or investigation to increase the scholarly understanding of the discipline involved.

OSA-Other Sponsored Agreements: Service and training activities that primarily benefit non-DU students/personnel. These include the following: Community outreach projects; Curriculum development/evaluation for outside entities; Travel and Conference grants; Service, development or training that are generally work for hire.

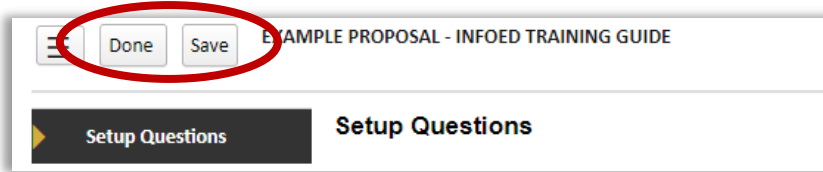
SI-Sponsored Instruction: Teaching and training activities funded by external sponsors for the benefit of DU students/personnel. Includes agreements which support curriculum development as well as teaching/training activities whether offered toward a degree or certificate.



5. Additional Information: Select whether you will submit the proposal to the sponsor or request ORSP's assistance with submission. *Note: ORSP is required to submit all federal proposals.*
6. Select *Save and Continue* in the bottom, left corner.
7. In the side navigation bar next to the *Setup Questions*, a white check mark implies that the screen has been completed. The screen will now be available in "View Only" mode. This triggers all other tabs of the proposal to appear. Click on the desired tab to navigate further.

IMPORTANT NOTES FOR ALL TABS

Save and Done Buttons: Select *Save* to save your progress before you advance to the next tab. Select *Done* only when you want to exit out of the proposal record. Closing the record using the X in the top, right corner does not mean that you have exited out of the proposal record. Always use the *Done* button to exit the record properly.

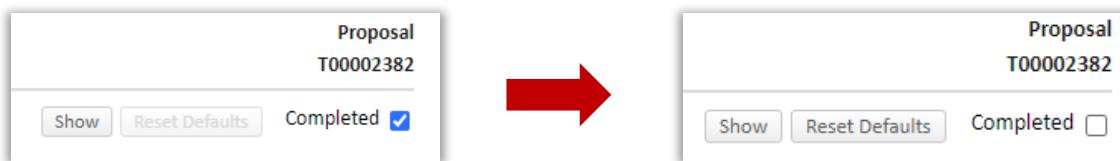


Done Save EXAMPLE PROPOSAL - INFOED TRAINING GUIDE

Setup Questions Setup Questions

Completed Check Box: As you finish answering the questions in each tab, indicate so by checking the *Completed* checkbox in the upper right corner of that screen. When all the tabs have been completed, you will be able to submit the final application.

Deselect the *Completed* checkbox on each screen to make edits. The screen will refresh and will be available to edit. Re-select the checkbox when you are finished.



Proposal T00002382

Show Reset Defaults Completed ☒

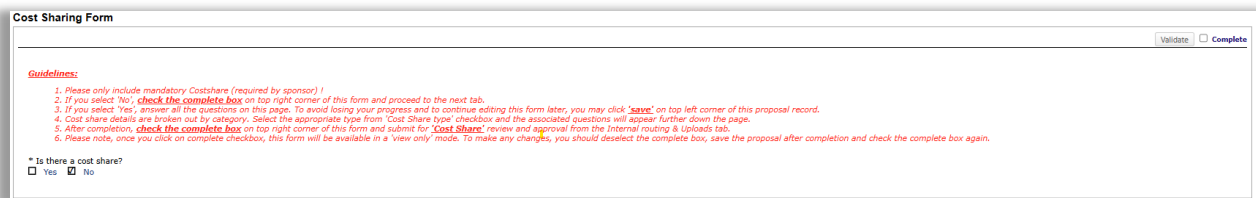
→

Proposal T00002382

Show Reset Defaults Completed ☐

Step 5: Cost Sharing Form

1. Select Yes or No to indicate whether Cost-Share is applicable.
2. If no, select *Complete* and move on to the next tab. If yes, complete the rest of the form.



Cost Sharing Form

Validate ☐ Complete

Guidelines:

1. Please only include mandatory Costshare (required by sponsor) !

2. If you select 'No', check the **complete box** on top right corner of this form and proceed to the next tab.

3. If you select 'Yes', answer all the questions on this page. To avoid losing your progress and to continue editing this form later, you may click 'save' on top left corner of this proposal record.

4. Cost share details are broken out by category. Select the appropriate type from 'Cost Share type' checkbox and the associated questions will appear further down the page.

5. After completion, check the **complete box** on top right corner of this form and submit for 'Cost Share' review and approval from the Internal routing & Uploads tab.

6. Please note, once you click on complete checkbox, this form will be available in a 'view only' mode. To make any changes, you should deselect the complete box, save the proposal after completion and check the complete box again.

* Is there a cost share?

☐ Yes ☒ No

3. Make sure that the *PI Name*, *Department*, *Sponsor*, and *Proposal Title* are correct.



Proposed Cost-Sharing Commitment Form

PI Gear, McKenzie
Department University of Denver

* Sponsor
Default Sponsor

Proposal Title
EXAMPLE PROP

4. Select the correct cost share type. Once a type of cost share is selected, more questions related to the cost share type selected will appear.
 - a. University Cost-Sharing – The cost share will come directly from the University, such as tuition, F&A Recovery, etc.
 - o Select the type of cost-sharing: mandatory or voluntary.

I. University Cost-Sharing

A) The proposed cost-share budget must be completed by category and reflect the budget proposed to the sponsoring agency.

B) If applicable, University personnel costs must be identified by individual(s) and percentage of time devoted to the project.

C) The source of cost-sharing must be completed. The source may be identified by:

- 1) an University account number (if known);
- 2) approved Department or Dean's Office accounts;
- 3) waiver of indirect costs. All waivers must be discussed and approved by the appropriate University Dean's Office.

Type of Cost-Sharing:

▼

Identify Personnel by Name)

	Year 1(Amount \$)	Year 2(Amount \$)	Year 3(Amount \$)	Year 4(Amount \$)	Year 5(Amount \$)	FOAP or Source of Cost-Sha
Mandatory						
Voluntary						

- Complete the cost share budget for each line item for each year. This is not your total budget, just the amount that will be cost shared. At the end of each line item, enter the FOAP or source of cost share.

Category (Identify Personnel by Name) Add						
Personnel:	Year 1(Amount \$)	Year 2(Amount \$)	Year 3(Amount \$)	Year 4(Amount \$)	Year 5(Amount \$)	FOAP or Source of Cost-Sharing
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
X						
Fringe Rate Add						
Fringe Rate:	Year 1(Amount \$)	Year 2(Amount \$)	Year 3(Amount \$)	Year 4(Amount \$)	Year 5(Amount \$)	FOAP or Source of Cost-Sharing
<input type="text"/> %	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
X						
Tuition						
Tuition:	Year 1(Amount \$)	Year 2(Amount \$)	Year 3(Amount \$)	Year 4(Amount \$)	Year 5(Amount \$)	FOAP or Source of Cost-Sharing
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Equipment						
Equipment:	Year 1(Amount \$)	Year 2(Amount \$)	Year 3(Amount \$)	Year 4(Amount \$)	Year 5(Amount \$)	FOAP or Source of Cost-Sharing
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other Direct Costs Add						
Other Direct Costs:(Specify)	Year 1(Amount \$)	Year 2(Amount \$)	Year 3(Amount \$)	Year 4(Amount \$)	Year 5(Amount \$)	FOAP or Source of Cost-Sharing
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
X						
Total Direct Costs						
Total Direct Costs:	Year 1(Amount \$)	Year 2(Amount \$)	Year 3(Amount \$)	Year 4(Amount \$)	Year 5(Amount \$)	FOAP or Source of Cost-Sharing
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Indirect Cost Rate						
Indirect Cost Rate:	Year 1(Amount \$)	Year 2(Amount \$)	Year 3(Amount \$)	Year 4(Amount \$)	Year 5(Amount \$)	FOAP or Source of Cost-Sharing
<input type="text"/> %	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total University Cost Sharing						
Total University Cost Sharing:	Year 1(Amount \$)	Year 2(Amount \$)	Year 3(Amount \$)	Year 4(Amount \$)	Year 5(Amount \$)	FOAP or Source of Cost-Sharing
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Cost Sharing Contribution						
<input type="text"/> \$						
Total Project Costs (Including University Cost Share Funds)						
<input type="text"/> \$						

- b. Third Party Cost-Sharing – The cost-share will come from a third-party source. The organization providing cost-sharing must be named and its respective contribution identified. Verification of third party cost-sharing

should be provided by a letter committing the organization to cost-share, signed by an authorized official.

- Fill in the organization. Select *Add* to add an additional organization.
- Enter the amount of cost sharing and the source (Industry, Foundation, Foreign, etc.).

II. Third Party Cost-Sharing

If cost sharing is proposed by third-party sources (i.e. the University is not a contributor), this section must be completed. The organization providing cost-sharing must be named and its respective contribution identified. Verification of third party cost-sharing should be provided by a letter committing the organization to cost-share, signed by an authorized official.

Organization

[Add](#)

Organization:

X

Amount of Cost-Sharing:

\$

Source of Cost-Sharing:

- c. Related University Cost-Share Accounts – The cost share will come from another University account/grant fund. The account must be related to the current proposed project. Please note that other Federal projects may not be used for cost sharing in proposals to Federal agencies, unless specifically approved by the sponsor.
- Enter the FOAP. Select *Add* to add an additional FOAP.
 - Enter the PI's name in the Investigator line and Title of the Project or brief descriptor.

III. Related University Cost-Share Accounts

If cost sharing is proposed by use of another University account in total, this section must be completed. The technical relationship between the two (or more) projects must be established. The accounts must be identified and the PI must certify to their relatedness. Please note that other Federal projects may not be used for cost sharing in proposals to Federal agencies, unless specifically approved by the sponsor.

University FOAP

[Add](#)

University FOAP:

X

Investigator:

Title of Project/Account Description:

5. After you have completed this tab, select *Complete* in the top right corner.

- Once the Cost Sharing Form and/or the F&A Waiver Form are complete, you must complete and submit the *Internal Routing & Uploads* Tab. This can be done prior to the completion of the other tabs.

Step 6: F&A Waiver Form

- Indicate if an F&A waiver is requested, Yes or No.

F&A Cost Waiver Request

Guidelines:


- If you select 'No', **check the complete box** on top right corner of this form and proceed to the next tab.
- If you select 'Yes', answer all the questions on this page. To avoid losing your progress and to continue editing this form later, you may click 'save' on top left corner of this proposal record.
- After completion, **check the complete box** on top right corner of this form and submit for 'IDC Waiver' review and approval from the Internal routing & Uploads tab.
- Please note, once you click on complete checkbox, this form will be available in a 'view only' mode. To make any changes, you should deselect the complete box, save the proposal after completion and check the complete box again.

* Is there a F&A waiver?
☐ Yes ☐ No

- If a waiver is requested, enter the due date and complete the F&A Waiver Questionnaire. Be sure to include a link to the funding opportunity and specify where the F&A restriction can be found (on the website, a specific page number in the funding opportunity announcement, etc.)

F&A waiver questionnaire

1a.Link to Funding Announcement or Application Guidelines

(or) 

1b.Sponsor F&A Letter Upload

*
 2.Is there a limit on the number of applications from an Institution?
☒ Yes ☐ No

*
 3.Full DU Negotiated F&A Cost Rate

(FY25 Rate Summary)

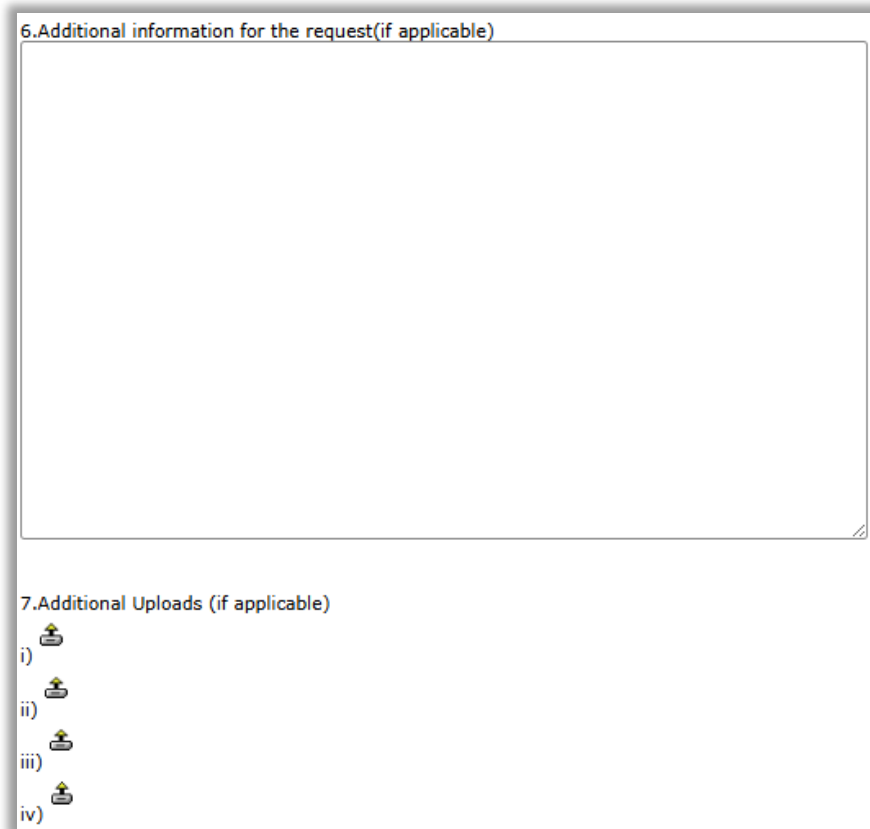
*
 4a.Is there an agency capped rate?
☒ Yes ☐ No

Please provide the location(section/page number) of the IDC restriction

*
 4b.If so, what is the rate?
 %


*
 5.Total Budget


3. Additional information and/or uploads can be added if needed.





6. Additional information for the request (if applicable)

7. Additional Uploads (if applicable)

i) 

ii) 

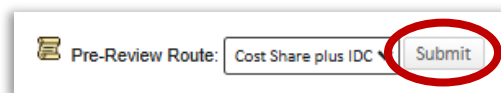
iii) 


iv) 

4. Select *Completed*.
5. As with the Cost Sharing Form, once the Cost Sharing Form and/or the F&A Waiver Form are complete, you must complete and submit the *Internal Routing & Uploads* Tab. This can be done prior to the completion of the other tabs.

Step 7: Internal Routing & Uploads

1. Once the Cost Sharing and F&A Waiver forms are complete, a Pre-Review Route will show up in this tab. If there is no Cost Share or F&A waiver, the route will include notifications only. Select *Submit*.



 Pre-Review Route: Cost Share plus IDC **Submit**

2. A new window with the route path will pop up. Routing steps are sequential and automatic. All designated approvers listed on this screen will be notified with a link to the approval page via email. Review the route.

Proposal **T00002382 - Mckenzie Gear** "EXAMPLE PROPOSAL - INFOED TRAINING GUIDE" (Under Development)

[Refresh Route](#) Route Path - **IDC Waiver** [Add New Person to Review Path](#) [Submit](#)

Step 7	ORSP	Mckenzie Gear	Approval Required	Insert After
Step 8	Executive Director	Dr. Corinne Lengsfeld	Approval Required	Insert After
Step 9	Notifications	Mckenzie Gear	Information Only	Insert After

3. Add additional people as needed using *Add New Person to Review Path* or *Insert After*, this will prompt a new window to open. In this window, you can find the individual who should be added to the route and select whether their approval is required (Approval Required) or if they should only be notified of the submission (Informational Only).

Add step [Add](#) [Cancel](#)

☐ Informational Only
☒ Approval Required

4. Select *Submit* when finished reviewing the route.

Proposal **T00002382 - Mckenzie Gear** "EXAMPLE PROPOSAL - INFOED TRAINING GUIDE" (Under Development)

[Refresh Route](#) Route Path - **IDC Waiver** [Add New Person to Review Path](#) [Submit](#)

Step 7	ORSP	Mckenzie Gear	Approval Required	Insert After
--------	------	---------------	-------------------	------------------------------

5. At any point in time, you may check in the Internal Routing & Uploads Tab who is reviewing/notified, approver's decision and comments under *Active Routing Progress*. You may also continue working on other tabs until you are notified.

[Active Routing Progress](#) [Open Full](#)

6. Back in the main tab, select *Completed* in the top right corner.

Step 8: Personnel

1. The key PI will be automatically listed on this screen upon proposal creation.

All Certifications and Training

Senior/Key

	PI	NAME/ROLE	MAIL	ALERT	COI	RESPONSIBLE	ORGANIZATION / DEPARTMENT
⋮	⊙	Mckenzie Gear PD/PI * Certifications and Training			?	<input checked="" type="checkbox"/>	University of Denver University of Denver

- To add additional personnel, type last name in the 'Name' field and select the correct individual from the search results. Select the individual's role from the *Role* drop-down and click *Save*.

Add Personnel [hide]

Proposal Element Proposal Structure
Prime

Add To:
☒ Budget Period (1)

Personnel Type
Key

Create Profile Name (Last, First) Role
Begin typing to select Personnel Name... Co-PD/PI

Save



Create Profile Name (Last, First) Role
default Co-PD/PI

Save Profile, Default - University of Denver -

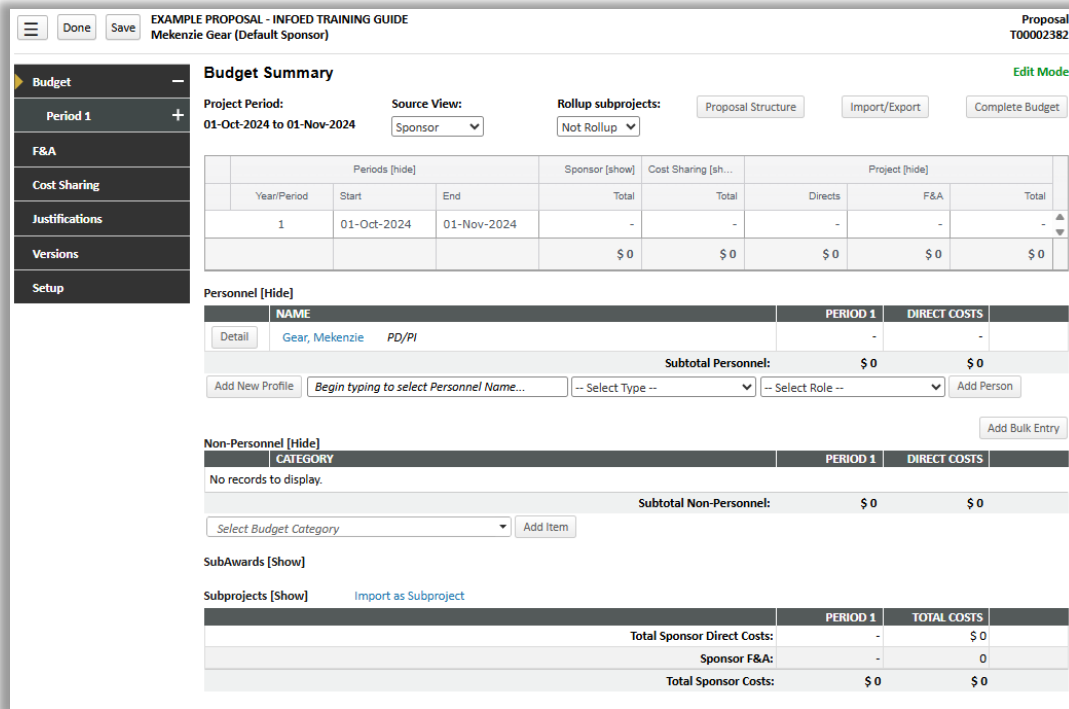
- You can track effort here and upload a CV/Biosketch and/or CPS Documents, although these are not required for submission. You can remove personnel by selecting the red X under *Remove*.

	% EFFORT	CV/BIOSKETCH	CURRENT/PENDING SUPPORT	REMOVE
	0%			

- When finished, select *Completed* in the top right corner.

Step 9: Budget

1. When *Budget* is selected from the menu on the left, a new window will pop up. Use the black side bar on the left to navigate through the budget tab the same way you would the proposal record.



Budget Summary

Project Period: 01-Oct-2024 to 01-Nov-2024 | Source View: Sponsor | Rollup subprojects: Not Rollup

Periods [hide]			Sponsor [show]	Cost Sharing [sh...]	Project [hide]		
Year/Period	Start	End	Total	Total	Directs	F&A	Total
1	01-Oct-2024	01-Nov-2024	-	-	-	-	-
			\$ 0	\$ 0	\$ 0	\$ 0	\$ 0

Personnel [Hide]

NAME	PERIOD 1	DIRECT COSTS
Gear, McKenzie PD/PI	-	-
Subtotal Personnel:		\$ 0

Non-Personnel [Hide]

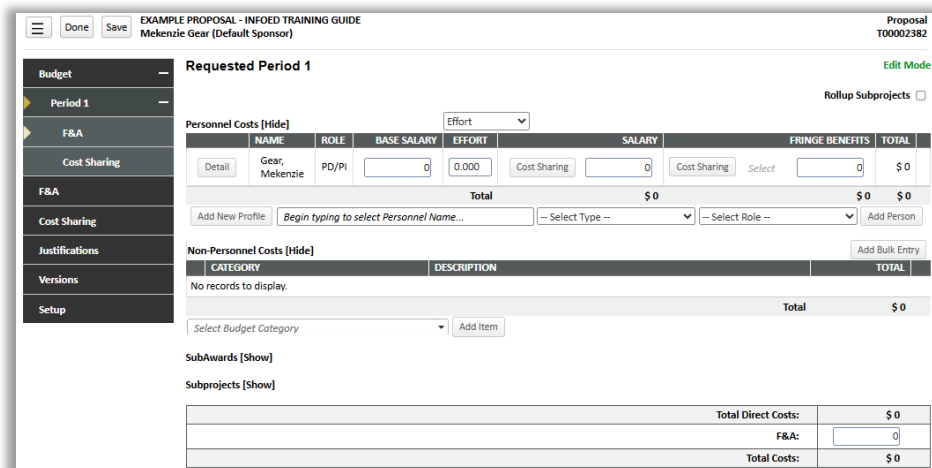
CATEGORY	PERIOD 1	DIRECT COSTS
No records to display.		
Subtotal Non-Personnel:		\$ 0

SubAwards [Show]

Subprojects [Show] [Import as Subproject](#)

	PERIOD 1	TOTAL COSTS
Total Sponsor Direct Costs:	-	\$ 0
Sponsor F&A:	-	0
Total Sponsor Costs:	\$ 0	\$ 0

2. The number of periods that you entered in the *New Proposal Questionnaire* screen will show in the side bar under *Budget*. Click on each period to enter the corresponding budget.



Requested Period 1

Rollup Subprojects ☐

Personnel Costs [Hide]

NAME	ROLE	BASE SALARY	EFFORT	SALARY	FRINGE BENEFITS	TOTAL
Gear, McKenzie	PD/PI	0	0.000	0	0	0
Total				\$ 0	\$ 0	\$ 0

Non-Personnel Costs [Hide]

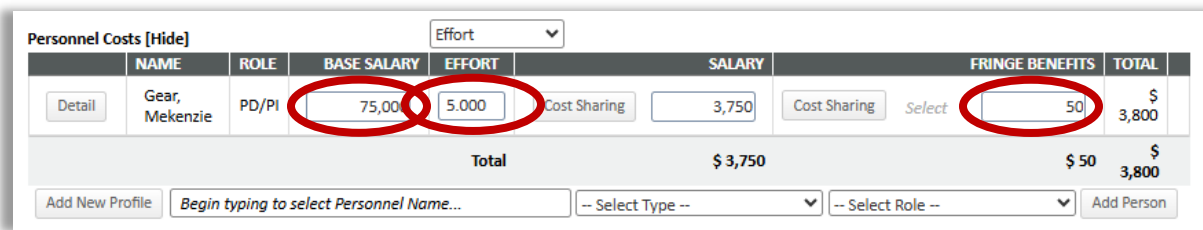
CATEGORY	DESCRIPTION	TOTAL
No records to display.		
Total		\$ 0

SubAwards [Show]

Subprojects [Show]

Total Direct Costs:	\$ 0
F&A:	0
Total Costs:	\$ 0

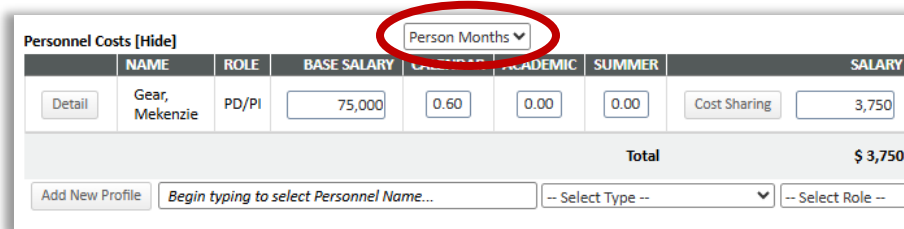
3. Personnel Costs: Use the *Personnel Costs* tab to enter base salary and effort to calculate salary for the project for each personnel. Enter fringe benefits.



Personnel Costs [Hide]		Effort							
	NAME	ROLE	BASE SALARY	EFFORT		SALARY		FRINGE BENEFITS	TOTAL
Detail	Gear, Mckenzie	PD/PI	75,000	5.000	Cost Sharing	3,750	Cost Sharing	Select 50	\$ 3,800
Total						\$ 3,750		\$ 50	\$ 3,800

Add New Profile Begin typing to select Personnel Name... -- Select Type -- -- Select Role -- Add Person

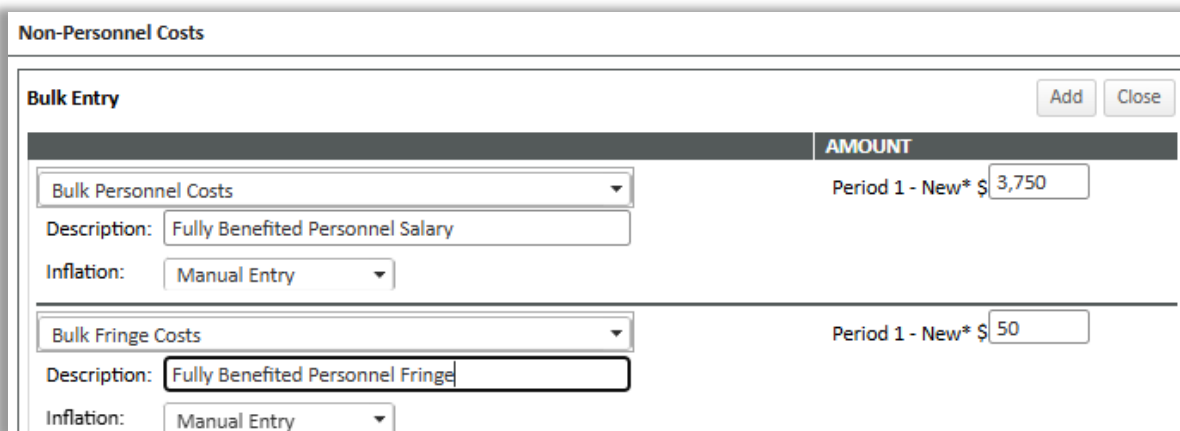
You can change *Effort* to *Person Months* by using the drop-down menu.



Personnel Costs [Hide]		Person Months							
	NAME	ROLE	BASE SALARY	PERSON MONTHS	ACADEMIC	SUMMER		SALARY	
Detail	Gear, Mckenzie	PD/PI	75,000	0.60	0.00	0.00	Cost Sharing	3,750	
Total								\$ 3,750	

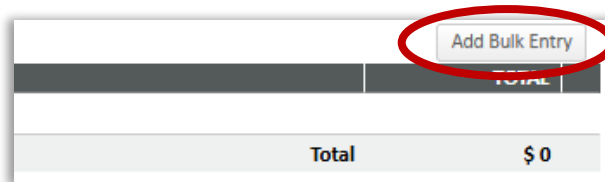
Add New Profile Begin typing to select Personnel Name... -- Select Type -- -- Select Role --

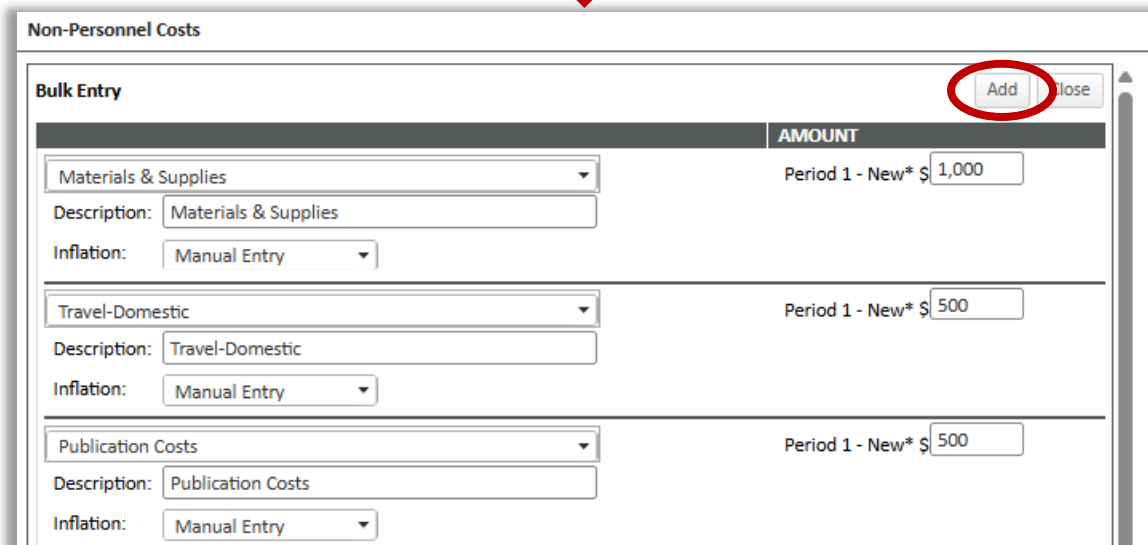
Personnel Costs Caveat: It's not uncommon to experience issues entering personnel into InfoEd. In these instances, ORSP recommends using the Non-Personnel Costs tab and entering salary and fringe as *Bulk Personnel* and *Bulk Fringe* respectively. Please separate salaries out by what fringe rate they will be receiving. For example, you can lump all fully benefited salaries in one *Bulk Personnel* line and lump all the fully benefited fringe in a *Bulk Fringe* line. The same can be done with non-benefited and student salaries and fringe. Please do not lump all three types together. You can use the *Description* line to identify which type of salary you are entering. Always reach out to your grant and contract admin if you have questions about entering the budget. Details on how to use *Bulk Entry* can be found in the next step.



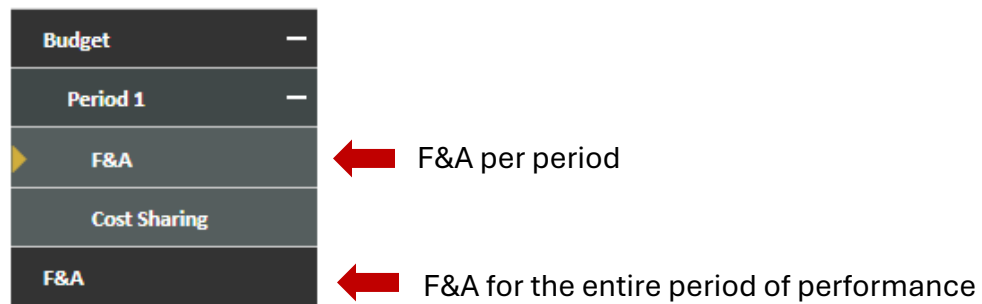
Non-Personnel Costs	
Bulk Entry Add Close	
Bulk Personnel Costs Description: Fully Benefited Personnel Salary Inflation: Manual Entry	Period 1 - New* \$ 3,750
Bulk Fringe Costs Description: Fully Benefited Personnel Fringe Inflation: Manual Entry	Period 1 - New* \$ 50

- Non-Personnel Costs: Use *Add Bulk Entry* to enter all other budget categories. Select the correct budget category from the drop-down menu and enter a description and a dollar amount. Select *Add* when finished.





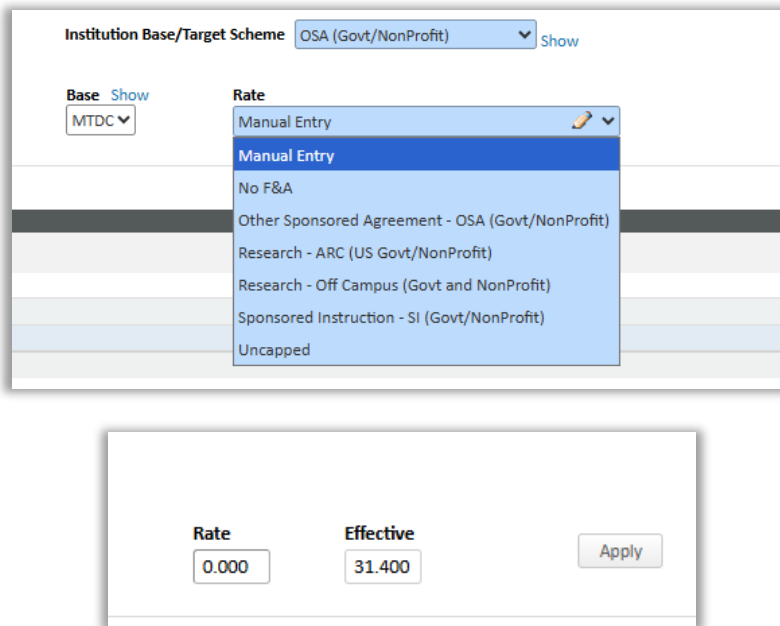
- F&A: You can look at the F&A tab per period or across the entire period of performance.



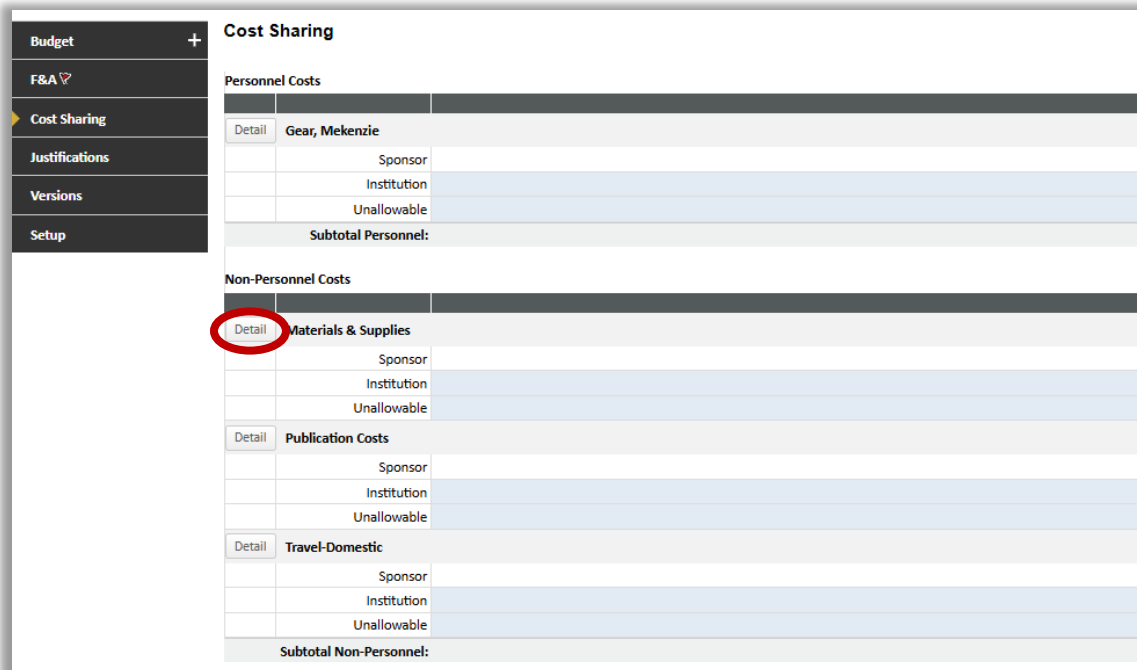
In the F&A tab, you will see that F&A is calculated automatically based on the program type selected during setup. Make sure that the program type selected is correct.



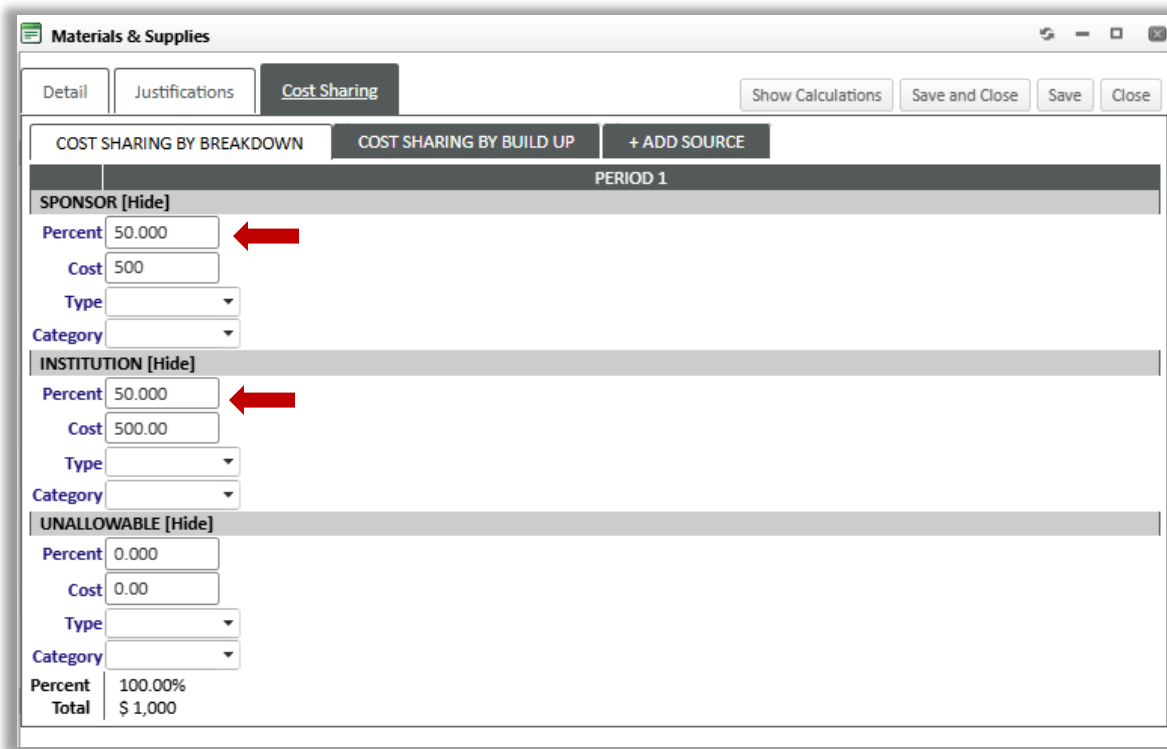
If there is an F&A Waiver, select *Manual Entry* from the *Rate* drop-down menu, enter the rate in the *Rate* box, and select *Apply*. If there is no F&A, select *No F&A* from the *Rate* drop-down menu and select *Apply*. This will automatically apply the correct F&A rate to the budget.



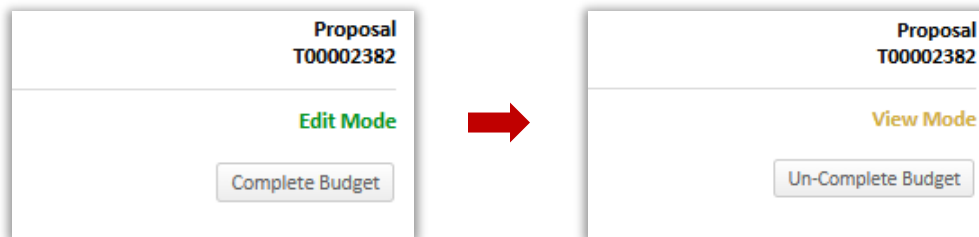
6. Cost-Sharing: Cost Sharing can be entered using the Cost Sharing tab by selecting *Detail* next to each line item that will be cost shared.



Percent can be used to adjust the amount paid by each party (sponsor, institution, etc.). Select *Save and Close* when you are finished.



- When you have completed the budget tab, select *Complete Budget* in the top right corner and then *Done* in the top left. If you need to edit the budget again, you will need to select *Un-Complete Budget*.



Step 10: PRA Form

The sections of the PRA form are listed below. Be sure to complete each section thoroughly. Items marked with asterisks are required to complete the PRA Form tab.

- Submission Information
- Project & Budget Information

3. HERD Survey Classifications
4. Human Subjects
5. Vertebrate Animals
6. Biosafety
7. Technology Transfer
8. Export Control
9. Research Security
10. Project Summary/Abstract

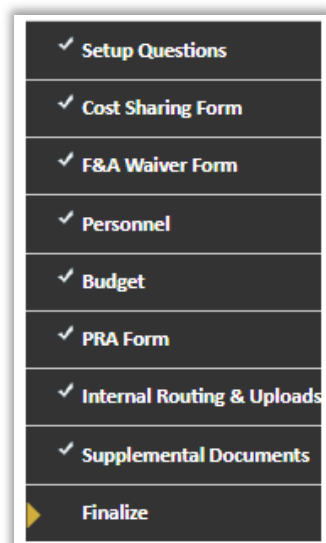
Select *Complete* when finished.

Step 11: Supplemental Documents

This section is optional. You may add any additional documents for record keeping purposes. Select *Complete* when finished, even if nothing has been uploaded.

Step 12: Finalize

1. In order to complete this step, all other pages must be completed (all must have 'complete' checked). White checks will appear on tabs that are complete. In addition, if you submitted a cost-share or F&A waiver form, those routes must be completed before this step.



2. Click *Build* to convert all forms, waivers, and supplemental documents to a single PDF.


Finalize

[Build PDF / Form Pages](#)
[Assemble Application](#)

Document	Page Count	Sequence	Edit
Cost Sharing Form	1	<input type="text" value="1"/>	
F&A Cost Waiver Request	1	<input type="text" value="2"/>	
PRA Form	3	<input type="text" value="3"/>	

[Submit for Internal Review](#)

3. Select *Submit for Internal Review*.


Submit Final Review

4. A window will open with the route path. Adding additional people works the same way as *Internal Routing & Uploads* - use *Add New Person to Review Path* or *Insert After*. Select *Submit* in the pop-up window when you are finished reviewing the route.

Proposal **T00002382** - Default Profile "EXAMPLE PROPOSAL - INFOED TRAINING GUIDE" (No Waiver/No Cost Share)

[Refresh Route](#)

Route Path - Budget and PRA Final Review		Add New Person to Review Path	
Step 2	PI (was not submitter)	Default Profile	Approval Required Insert After
Step 14	ORSP	Peter Stansbery	Approval Required Insert After
Step 15	Notifications	Peter Stansbery	Information Only Insert After
	Notifications	Default Profile	Information Only Insert After

[Submit](#)

No comments have been recorded yet

Like *Internal Routing and Uploads*, final routing steps are sequential and automatic. All designated approvers listed on this screen will be notified with a link to the approval page via email. At any point in time, you may check who is reviewing/notified, approver's decision and comments under *Active Routing Progress*.