UNIVERSITY OF DENVER

Sponsored Programs Administration

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.

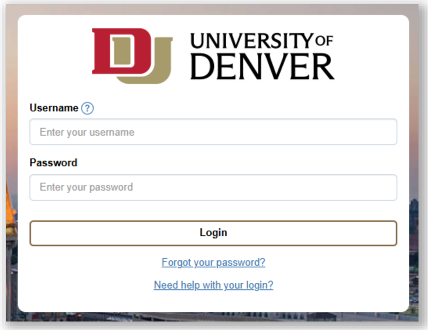
Contact Information

ORSP Office Email: orsp@du.edu

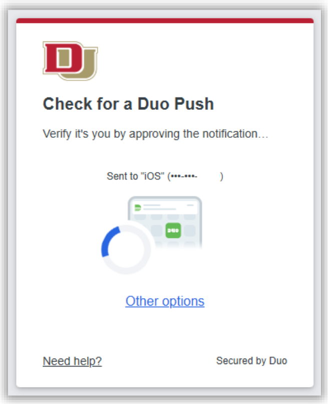
Find contact information for your specific Grant and Contract Administrator here: https://www.du.edu/orsp/spa/people

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*.

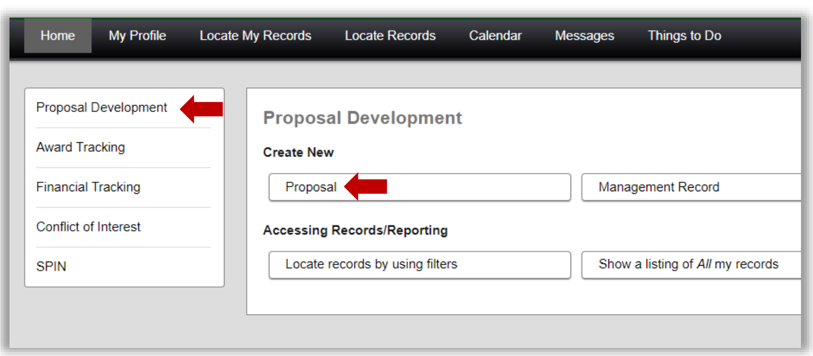


3. You will be redirected to multifactor authentication to complete the log in process.



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

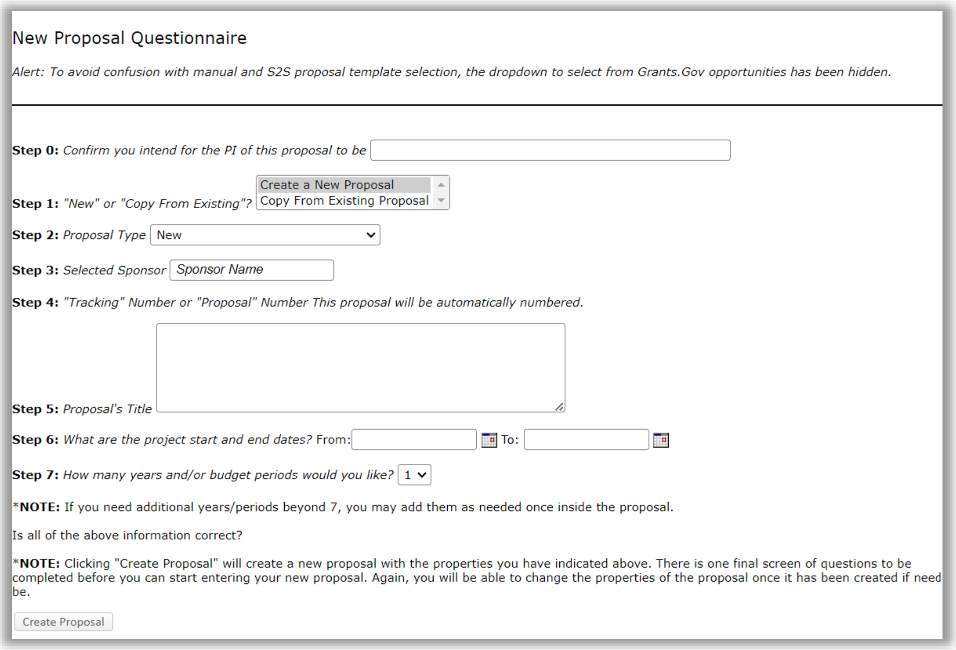
1. Select *Proposal Development* in the sidebar of your home page.
2. Select *Proposal* under *Create New*. Your new proposal setup page will open in a new window.



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

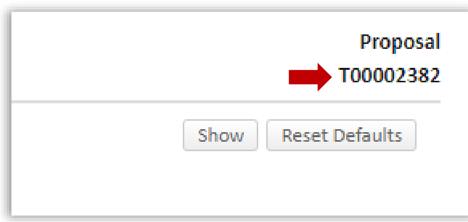
1. **Step 0:** By default, the person creating the proposal is listed as the PI. To modify this, click in the text box and begin typing the desired PI's name. Select the correct name from the search list. If the PI's name is not included in the search, contact your grant and contract administrator to 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. <u>ORSP strongly suggests selecting *Create a New Proposal*.</u>
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.

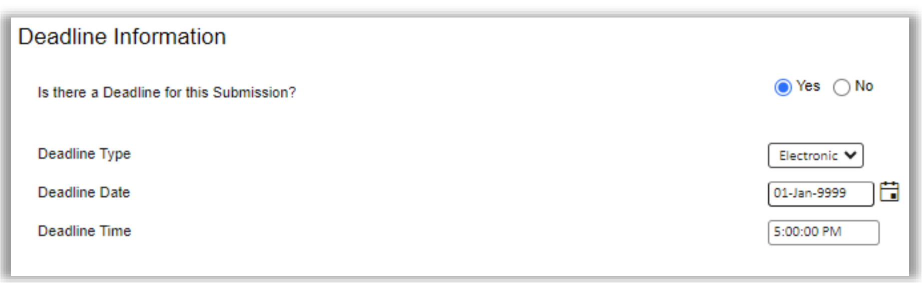
5. **Step 4:** No action required. The Tracking Number or Proposal Number for a proposal will be automatically generated.
6. **Step 5:** Enter the proposal's title.
7. **Step 6:** Click the calendar icon to select project start and end dates or manually enter the dates in the format "DD-MM-YYYY". The 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.

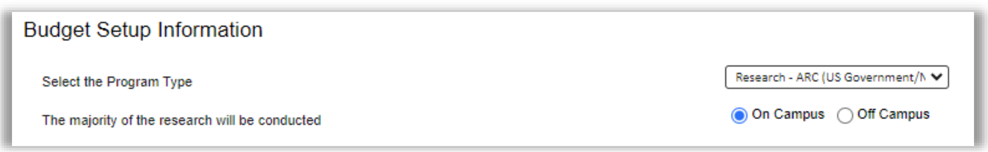


3. General Proposal Properties: Indicate whether your proposal will involve the use of Human Subjects and/or Laboratory Animals.
4. Budget Setup Information: Please review the program types listed below, choose an appropriate program type, and indicate whether the project is considered on or off campus. 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.

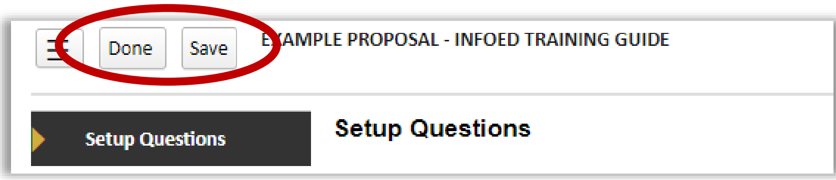
    SI-Sponsored Instruction: Teaching and training activities funded by external sponsors for the benefit of DU students/personnel. Includes agreements which support curriculum development as well as teaching/training activities whether offered toward a degree or certificate.



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.

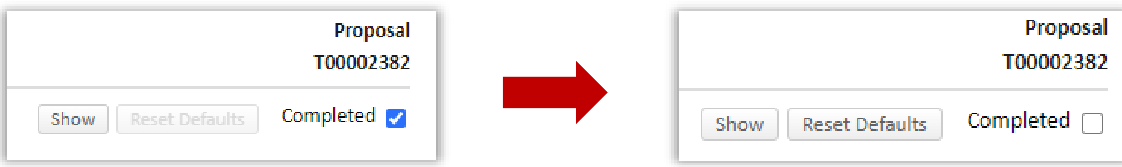
IMPORTANT NOTES FOR ALL TABS

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.



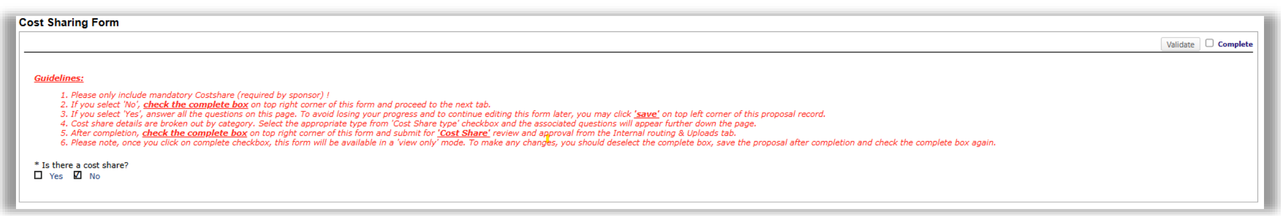
Completed Check Box: As you finish answering the questions in each tab, indicate so by checking the *Completed* checkbox in the upper right corner of that screen. When all the tabs have been completed, you will be able to submit the final application.

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.

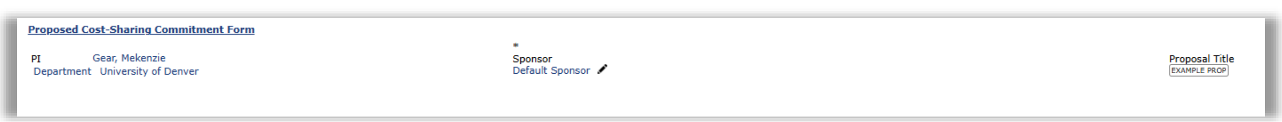


Step 5: Cost Sharing Form

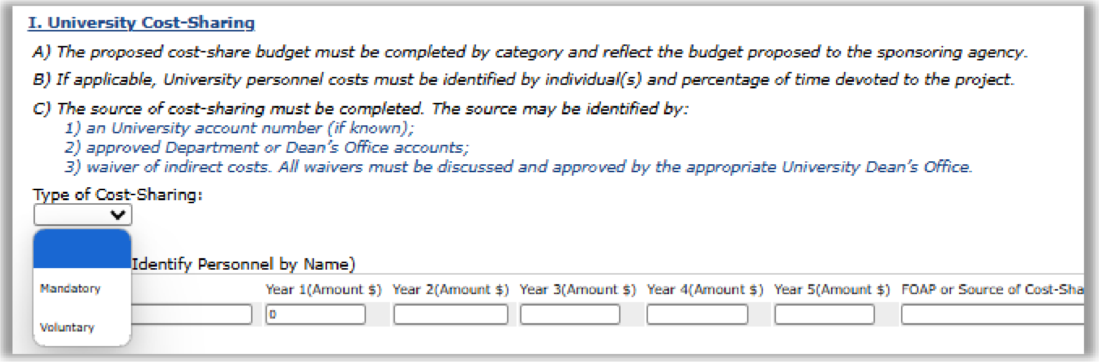
1. Select *Yes* or *No* to indicate whether Cost-Share is applicable.
2. If no, select *Complete* and move on to the next tab. If yes, complete the rest of the form.



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



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.
        - 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:

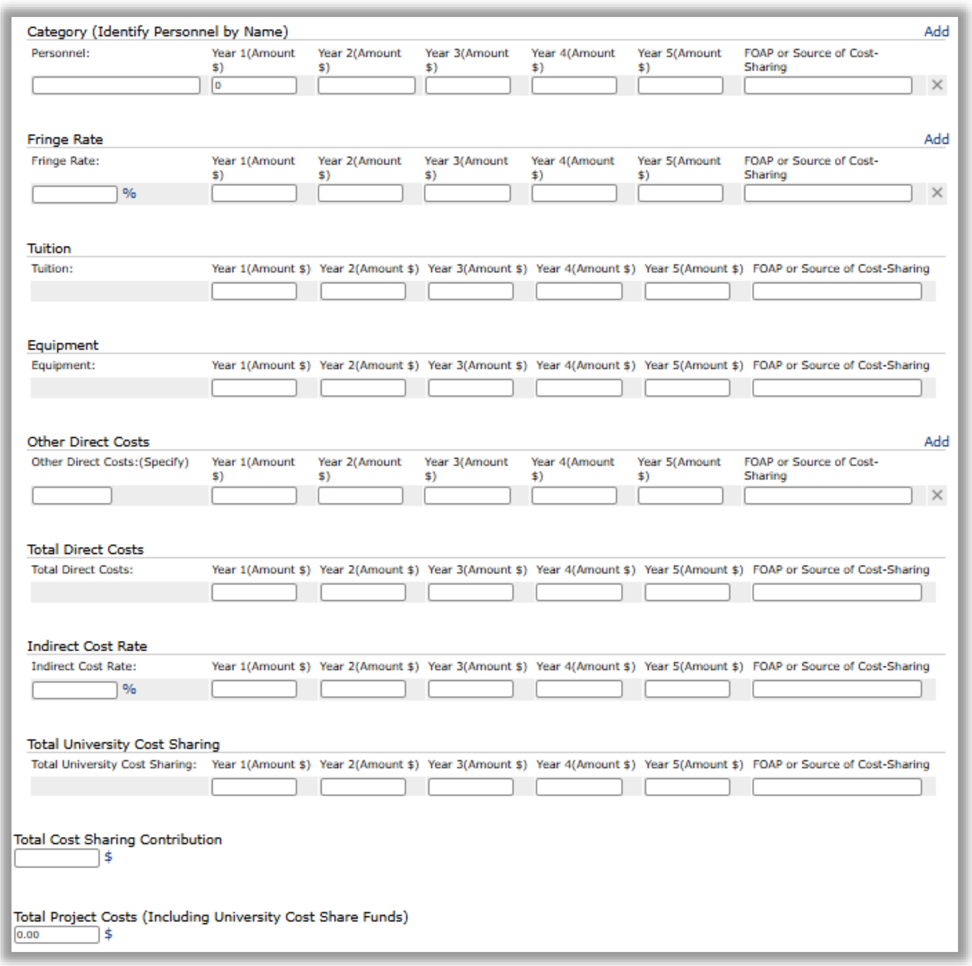
Mandatory

Voluntary

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
	0					

- 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	
	0						×

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	
%							×

Tuition

Tuition:	Year 1(Amount $)	Year 2(Amount $)	Year 3(Amount $)	Year 4(Amount $)	Year 5(Amount $)	FOAP or Source of Cost-Sharing

Equipment

Equipment:	Year 1(Amount $)	Year 2(Amount $)	Year 3(Amount $)	Year 4(Amount $)	Year 5(Amount $)	FOAP or Source of Cost-Sharing

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	
							×

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

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
%						

Total University Cost Sharing

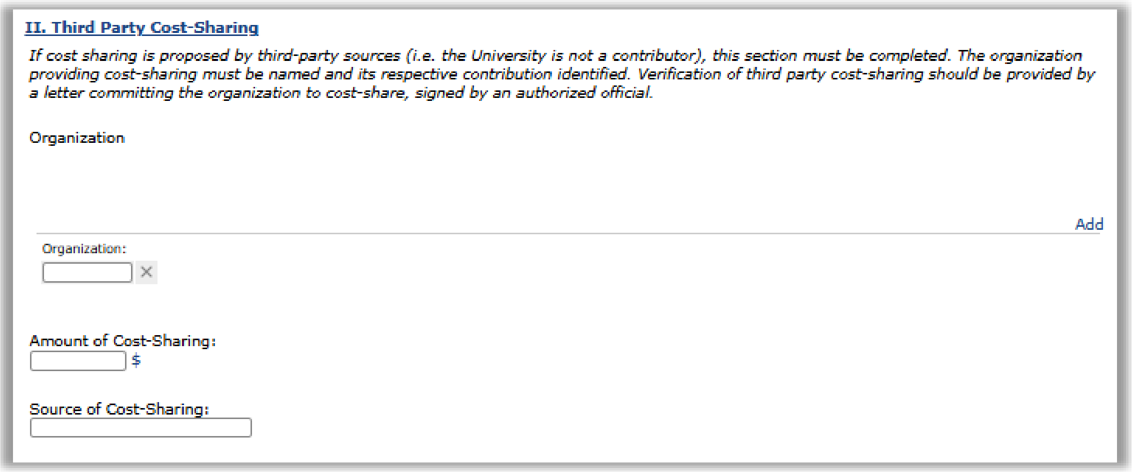
Total University Cost Sharing:	Year 1(Amount $)	Year 2(Amount $)	Year 3(Amount $)	Year 4(Amount $)	Year 5(Amount $)	FOAP or Source of Cost-Sharing

Total Cost Sharing Contribution
$

Total Project Costs (Including University Cost Share Funds)
0.00 $

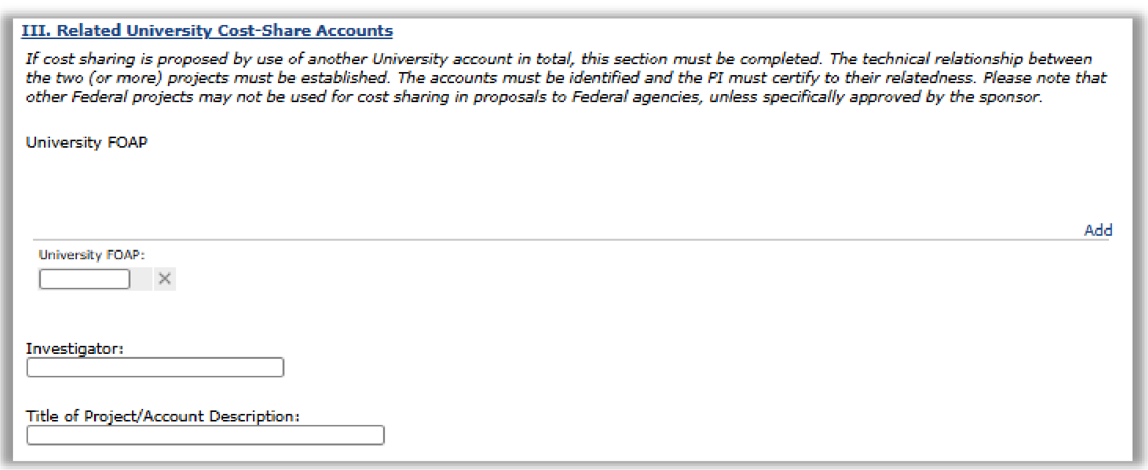
b. Third Party Cost-Sharing – The cost-share will come from a third-party source. The organization providing cost-sharing must be named and its respective contribution identified. Verification of third party cost-sharing should be provided by a letter committing the organization to cost-share, signed 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.).



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.

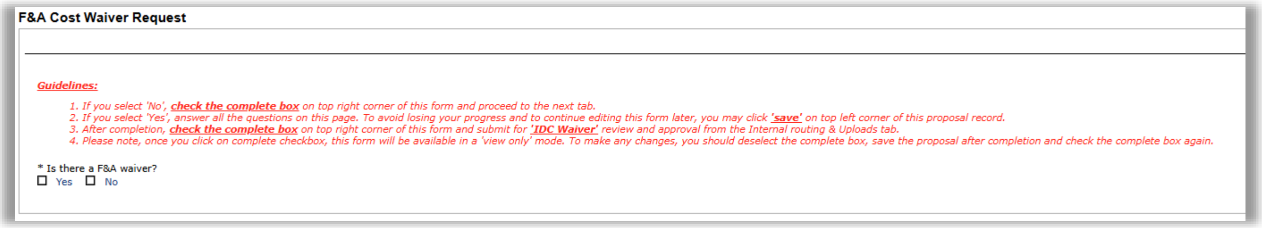


5. After you have completed this tab, select *Complete* in the top right corner.

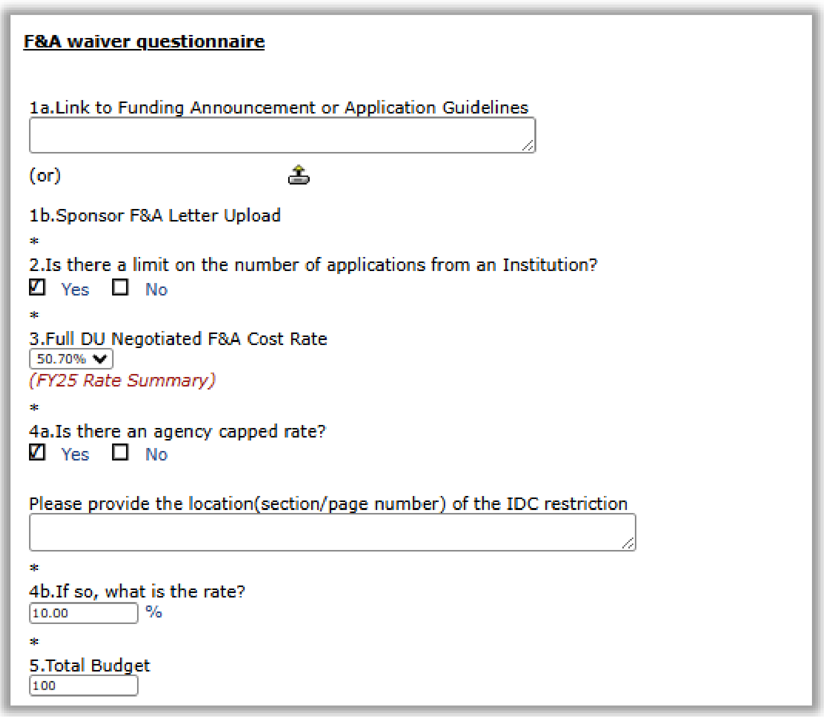
6. Once the Cost Sharing Form and/or the F&A Waiver Form are complete, you must complete and submit the *Internal Routing & Uploads* Tab. This can be done prior to the completion of the other tabs.

Step 6: F&A Waiver Form

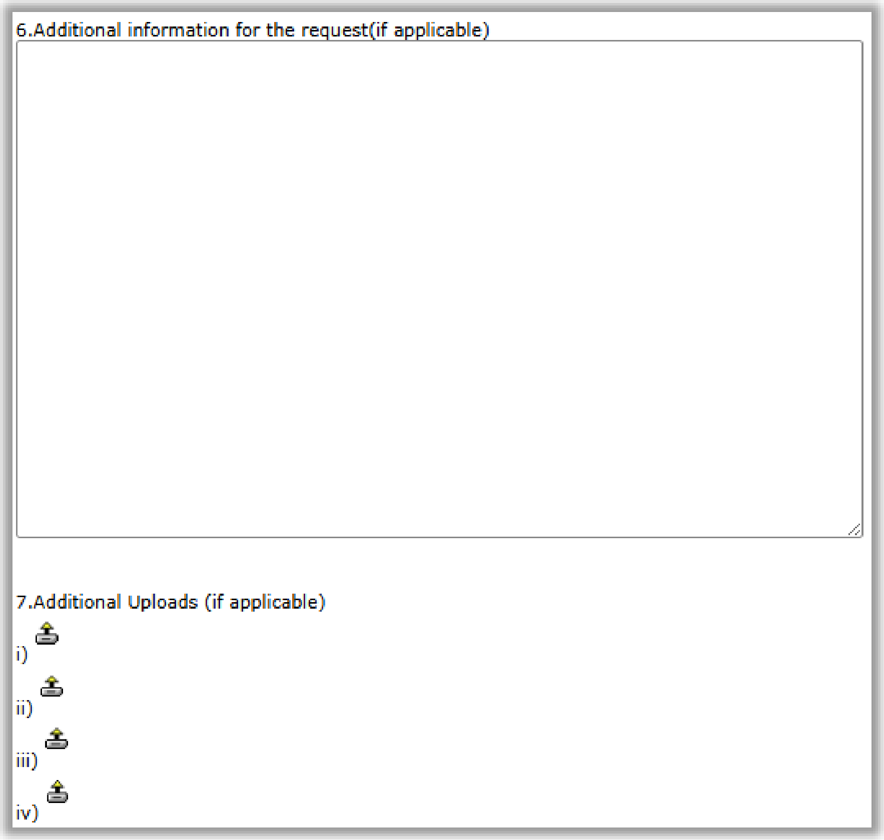
1. Indicate if an F&A waiver is requested, *Yes* or *No*.



2. 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.)



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

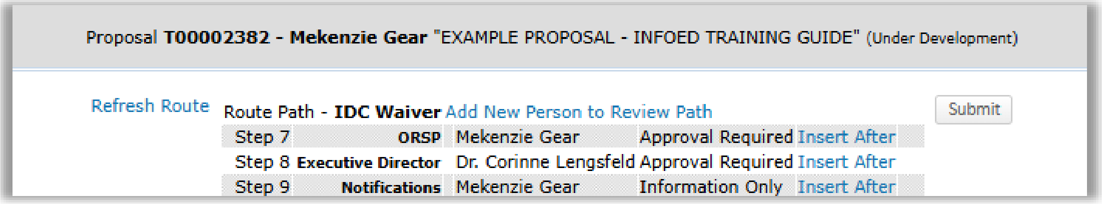


4. Select *Completed*.
5. As with the Cost Sharing Form, once the Cost Sharing Form and/or the F&A Waiver Form are complete, you must complete and submit the *Internal Routing & Uploads* Tab. This can be done prior to the completion of the other tabs.

Step 7: Internal Routing & Uploads

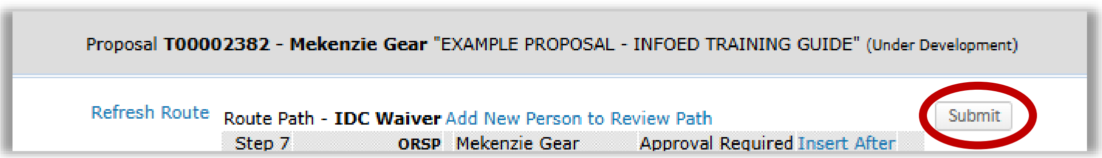
1. One the Cost Sharing and F&A Waiver forms are complete, a Pre-Review Route will show up in this tab. If there is no Cost Share or F&A waiver, the route will include notifications only. Select *Submit*.

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.



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).

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



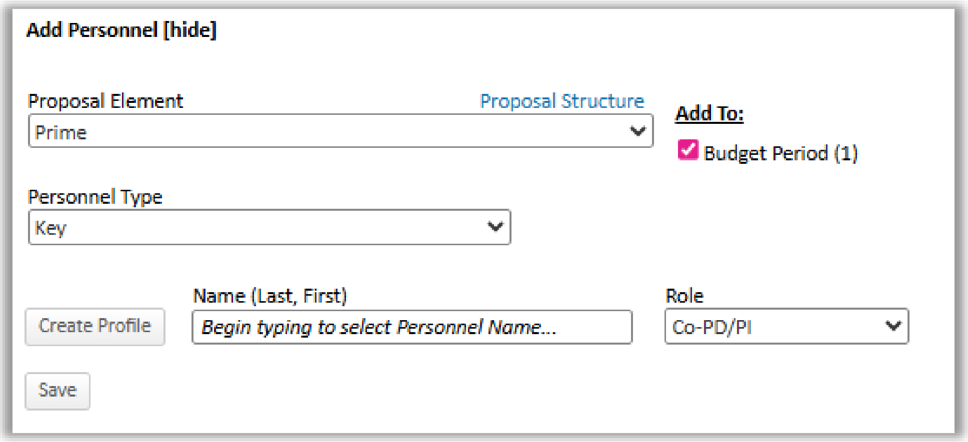
5. At any point in time, you may check in the Internal Routing & Uploads Tab who is reviewing/notified, approver's decision and comments under *Active Routing Progress*. You may also continue working on other tabs until you are notified.

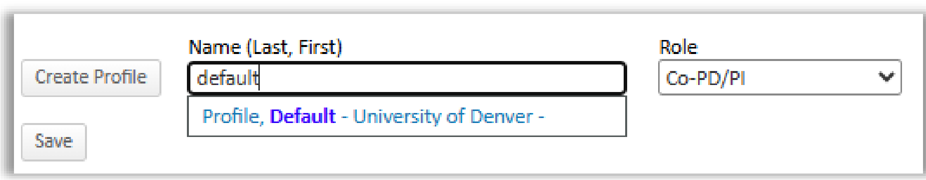
6. Back in the main tab, select *Completed* in the top right corner.

Step 8: Personnel

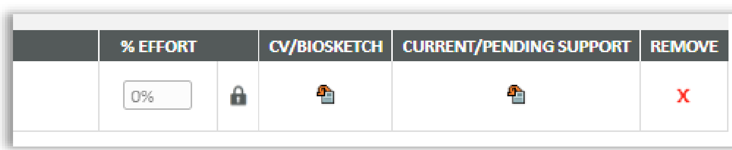
1. The key PI will be automatically listed on this screen upon proposal creation.

2. 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*.





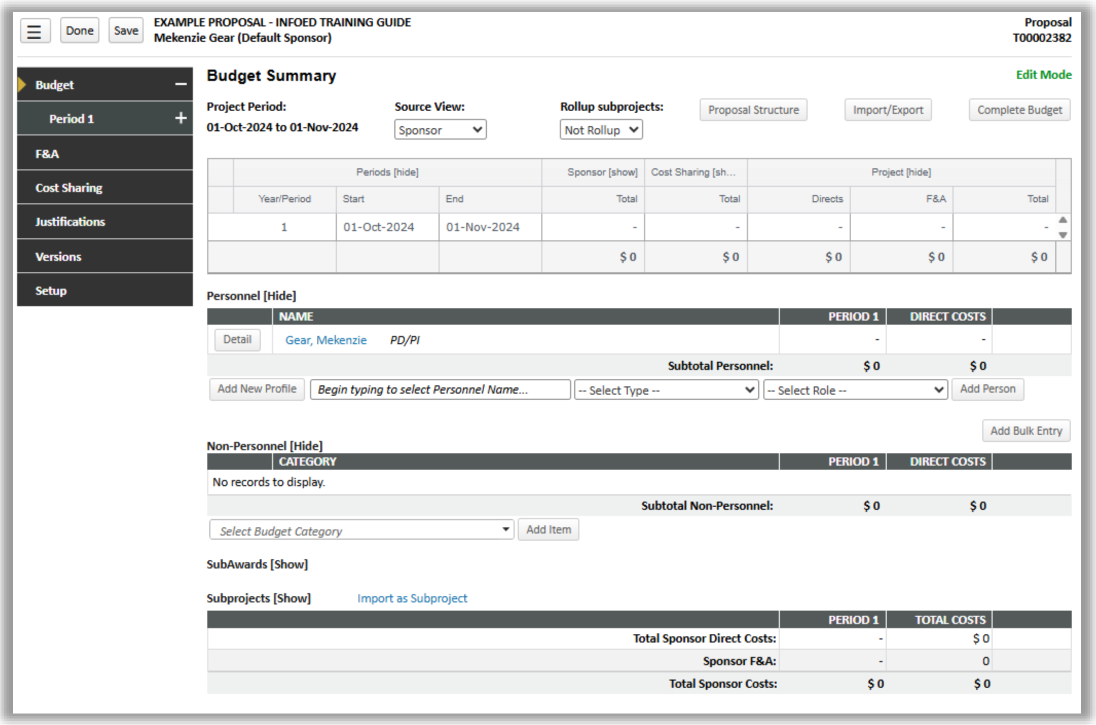
3. You can track effort here and upload a CV/Biosketch and/or CPS Documents, although these are not required for submission. You can remove personnel by selecting the red *X* under *Remove*.



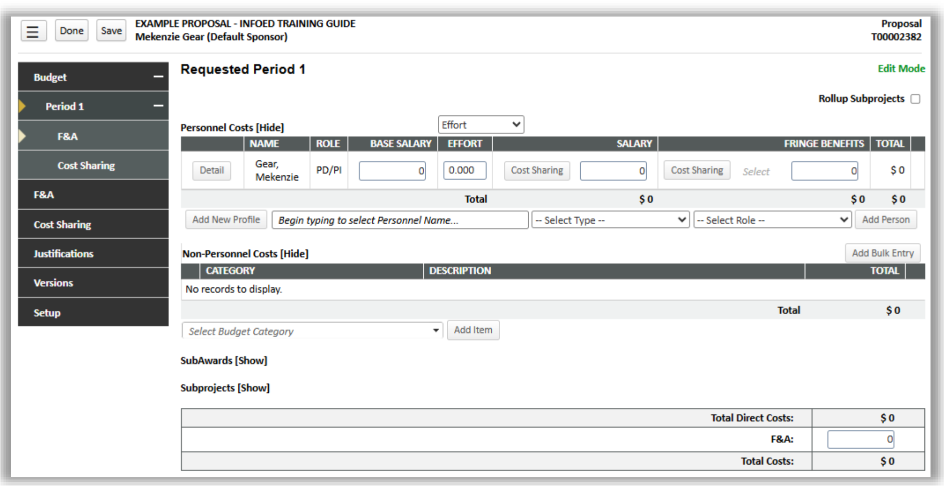
4. When finished, select *Completed* in the top right corner.

Step 9: Budget

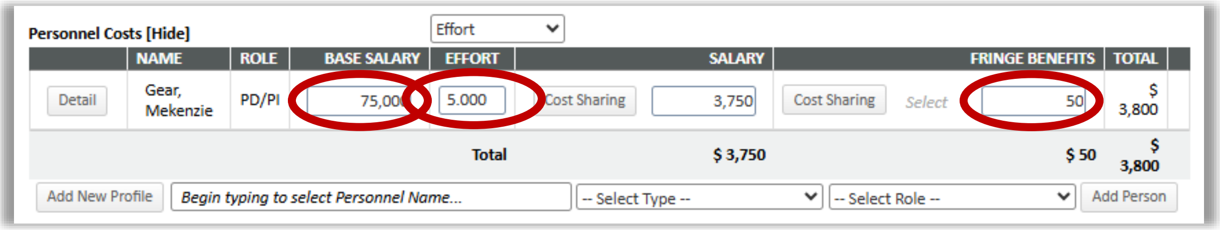
1. When *Budget* is selected from the menu on the left, a new window will pop up. Use the black side bar on the left to navigate through the budget tab the same way you would the proposal record.



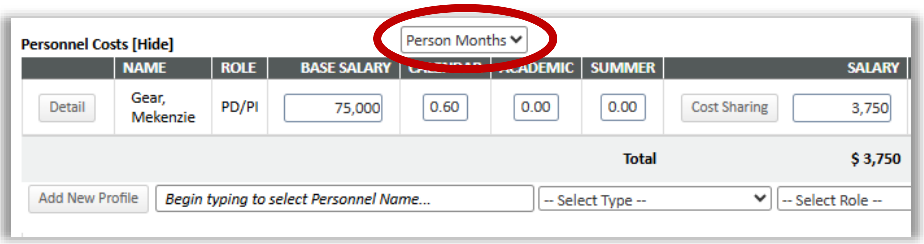
2. The number of periods that you entered in the *New Proposal Questionnaire* screen will show in the side bar under *Budget*. Click on each period to enter the corresponding budget.



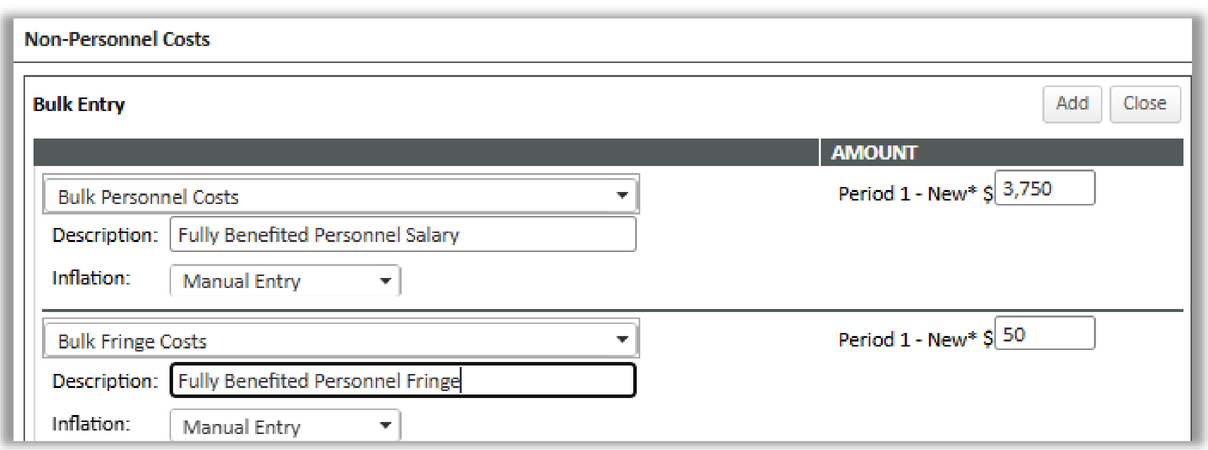
3. Personnel Costs: Use the *Personnel Costs* tab to enter base salary and effort to calculate salary for the project for each personnel. Enter fringe benefits.



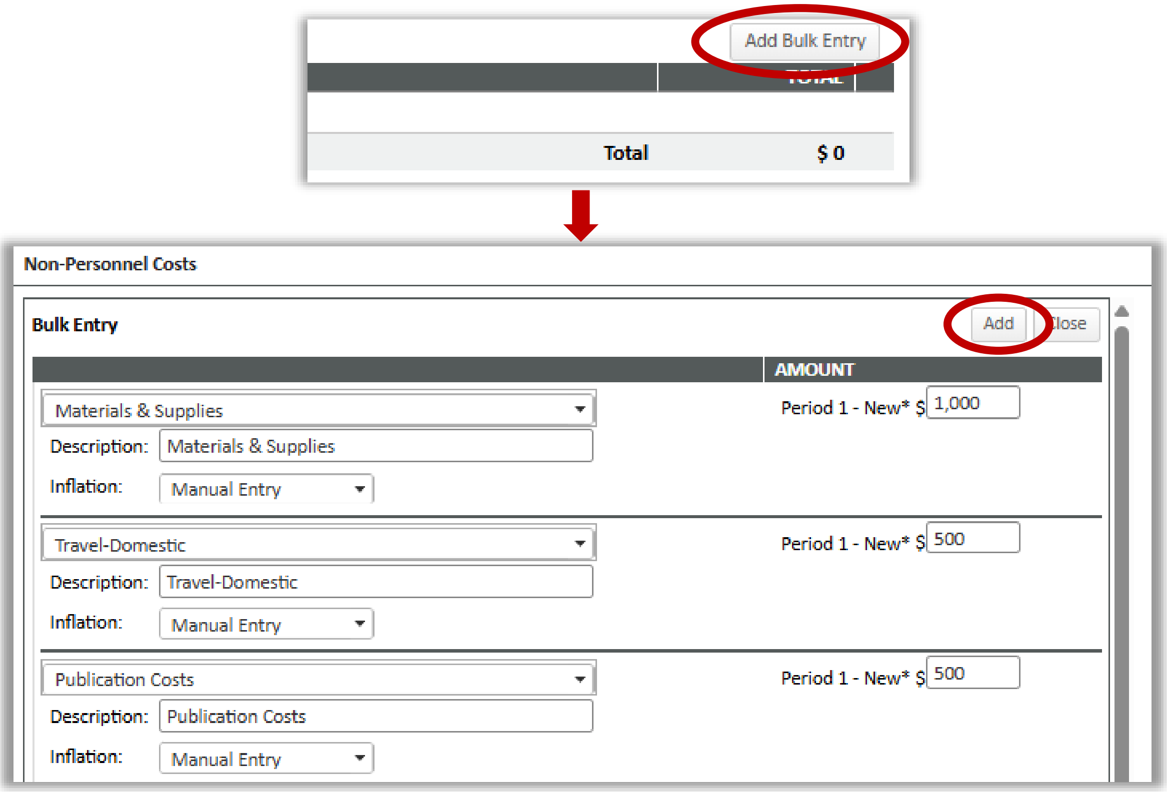
You can change *Effort* to *Person Months* by using the drop-down menu.



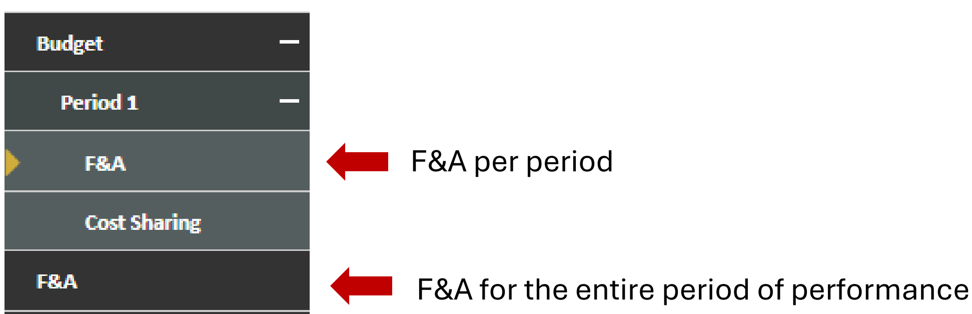
Personnel Costs Caveat: It's not uncommon to experience issues entering personnel into InfoEd. In these instances, ORSP recommends using the Non-Personnel Costs tab and entering salary and fringe as *Bulk Personnel* and *Bulk Fringe* respectively. Please separate salaries out by what fringe rate they 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.



4. 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.

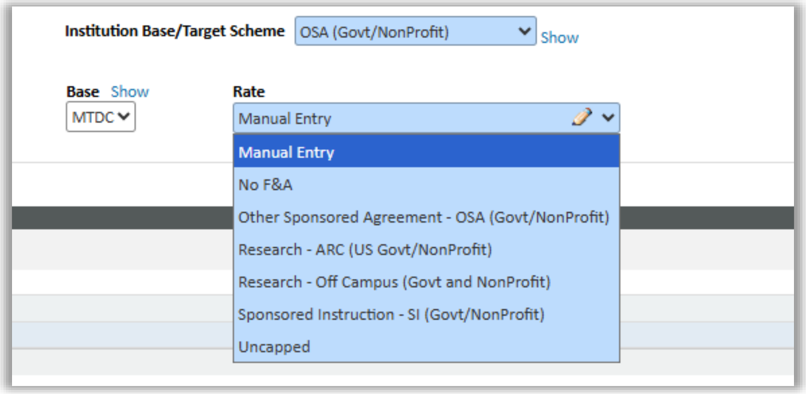


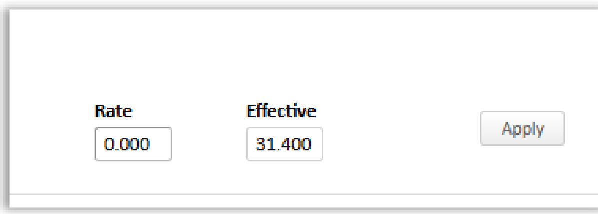
5. F&A: You can look at the F&A tab per period or across the entire period of performance.



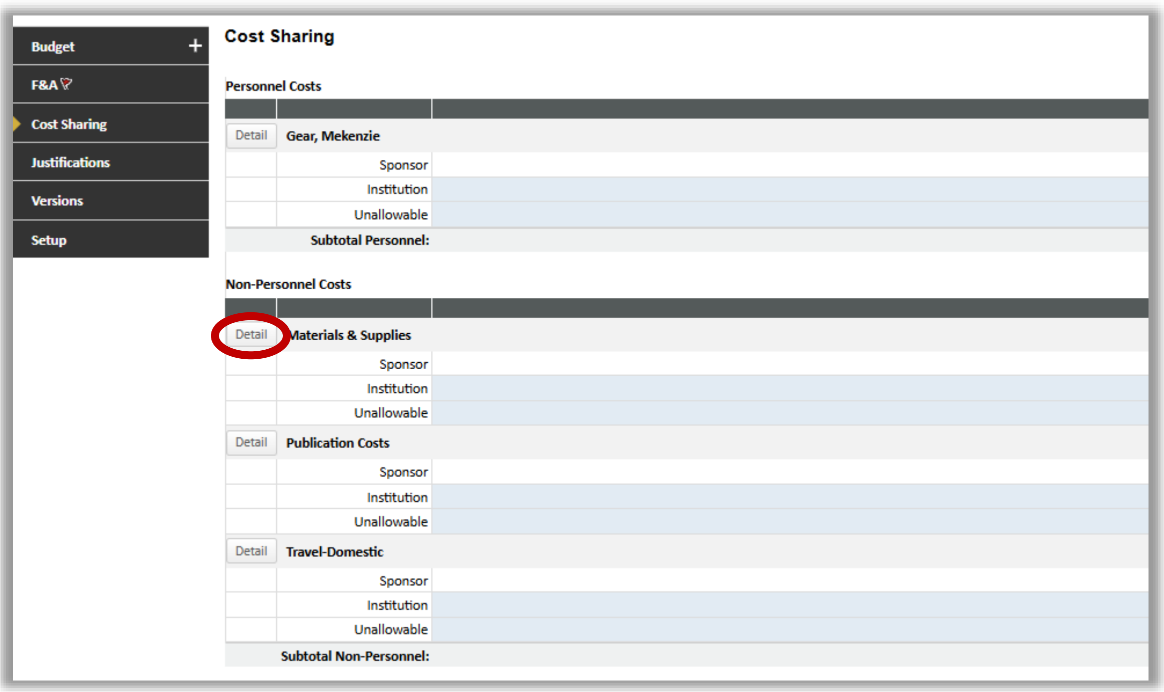
In the F&A tab, you will see that F&A is calculated automatically based on the program type selected during setup. Make sure that the program type selected is correct.

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 from the *Rate* drop-down menu and select *Apply*. This will automatically apply the correct F&A rate to the budget.

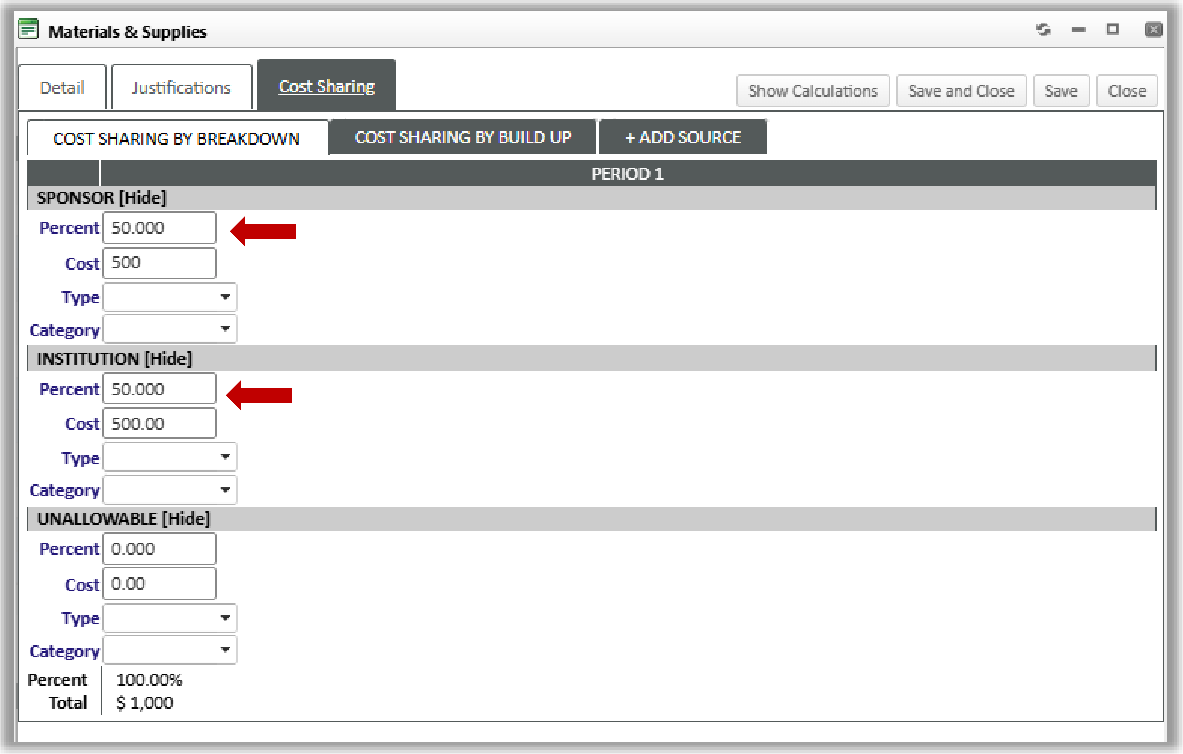




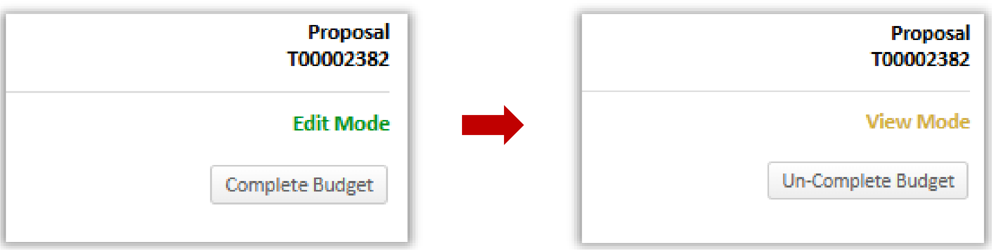
6. Cost-Sharing: Cost Sharing can be entered using the Cost Sharing tab by selecting *Detail* next to each line item that will be cost shared.



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



7. 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.

1. Submission Information
2. 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

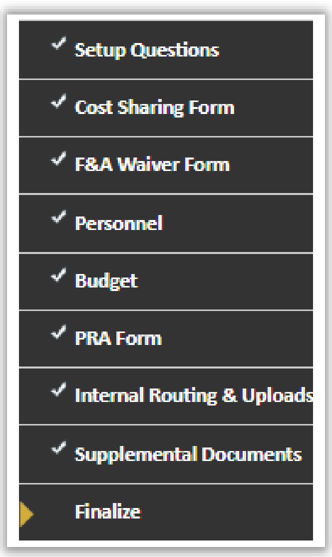
Select *Complete* when finished.

Step 11: Supplemental Documents

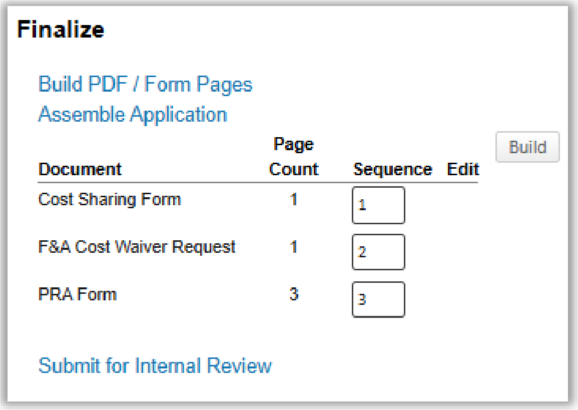
This section is optional. You may add any additional documents for record keeping purposes. Select *Complete* when finished, even if nothing has been uploaded.

Step 12: Finalize

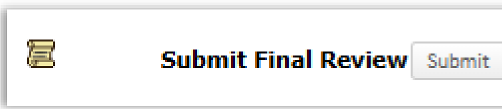
1. In order to complete this step, all other pages must be completed (all must have 'complete' checked). White checks will appear on tabs that are complete. In addition, if you submitted a cost-share or F&A waiver form, those routes must be completed before this step.



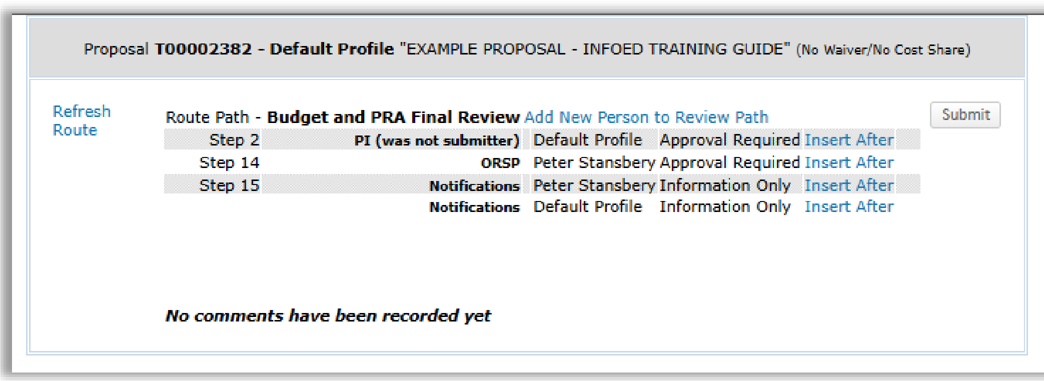
2. Click *Build* to convert all forms, waivers, and supplemental documents to a single PDF.



3. Select *Submit for Internal 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.



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*.