InfoEd Tips and Tricks

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How to Find Your Proposal

• You can run a report to list all of your proposals. See the SOPs for reports for details.
• You can search by PI or sponsor. Log in to PT and go to My Proposals > Search For and enter PI name in the PI field or sponsor name in the Sponsor/Scheme field. Click Locate or the enter key.
• You can use an * at the end of a proposal number such as 15-04*

Search by CU-B Project Number of Awarded Project

• Click on My Financials
• Click Search for Accounts
• Enter Account Number (Account Number is the term used in InfoEd for CU-B Project Numbers)
• Click Locate

Search by Sponsor Proposal Number

You can search by the sponsor proposal number from My Proposals > Search For. Click the arrows for Show Additional Search Options and enter the proposal number in “Sponsor Program #” box (see below).
Search by Co-PI

- Got to My Proposals > Search For screen.
- Click on Show Additional Search Options to open additional search fields.
- Find the Co-PI name in the Investigator field and click Enter or the Locate button.
- Search results will pull proposals related to the Co-PI.

Search with * Wildcard *

- Use can use a wildcard with at least three digits.
- For example, *155* will bring up any proposals with sponsor assigned proposal number containing these three digits in that order.

Creating a New PT Record

- Selecting PI – carefully select when have multiple appointments. If you’re not familiar with the correct one, you will need to check with the department or reference the PSR form to confirm you have the right org code.
- For Fellowships - Students as PI with chair approval

Agreements, Approvals, Attachments

- PAs will not use the Agreement folder
- Approvals – PAs will use this to indicate that these are part of the proposal. We do not upload any attachments in Approvals.
- Attachments folder – All attachments go here.
Attachments

- Error when uploading Excel file – If you get this error, try a different browser and/or closing the file if opened.

Detailed Budget

- PI time – leave blank

Status History

If you need to enter a Status History for a second time (not sure if this would ever come up but if it does . . . ), you cannot enter the same Status History for the same date right after entering a status.

To add, select the Status History, enter a new date and click Add. The Add button is not available if the date matches with the date of the same Status History that was just entered.

If you enter Status History A, enter Status History B, and then go back and enter a second Status History A, you can add with the same date (though this would likely never be needed).

When we go live, OCG staff will not have access to delete a status history and there is no way to edit a status history. If you have a status history that needs to be deleted, email the request to your manager with the reason it needs to be deleted. Managers will review and email the eRA Administrator to have it deleted.

Subawards

- Don’t add new subawardee institution/organization. This will need to be done by eRA Administrator – information needs to match up with other systems. Email information to have sub added.

- If you have a subaward on multiple years of a budget, set up Budget Period 1 with the subaward and then create additional years using “New Period” button. The sub will copy over from year to year.

- Do NOT enter any dollar amounts for subawards.
Child Proposals (Supplements and Continuations)

When creating a child proposal from within the original proposal using “Add New PT” (as in screenshot below), any information entered in the original proposal for IDC rate or cost share on the Budget Summary screen as well as any subawards (but not on the budget screens) will be copied over.

There are two solutions:

1. Some of the copied information may be useful, such as if the IDC rate and subawardees are the same between master and child proposals. You can use the “Add New PT” to create the record and then edit/delete items that need to be changed.

The best place to delete a subaward in this case is from the Budget Summary screen. Under the budget periods, you’ll see the subaward (“Consortium”) listed. At the top of the Consortium section there’s a trash can icon that will delete the subaward.

2. Create a new Master proposal for the supplement or continuation and then use the Master Record Control on the Proposal Summary screen to make the supplement or continuation proposal a child of the original, master proposal. You’ll need the proposal number of the master to do this.

Child Proposal vs. Related Proposals

• Create child proposals for supplements and continuations
• Relate renewals to the original proposal.
Checking Proposals for Award and Award Processing Status

There are several places to check if an award has been received:

1. In the results of a search from My Proposals, if an award has been received, the sponsor’s award number will show in the Award Number column of the search results.

2. In a PT record, click on the yellow Awards folder.

- The number in parentheses next to “Awards” of the PT Awards folder indicates the number of mods associated with this award.
- If an award has been received, there will be one blue AT “Award” folder.
- In the PT, yellow folder Awards screen, you will see award details including:
  - Approved start and end date
  - Total funded amount
  - Status of processing under “Award Information”
  - Any subs on award
  - Note that GOs and COs are currently using budget period 1 for ALL years of an award. Subsequent budget periods will not be used for out years.
3. Use an AT Record (blue folders) by clicking on the blue Award folder from PT

The AT Award Summary screen will show:
- Approved start and end date
- Total funded amount from all mods
- Related project numbers/account numbers in FT
- Award increment details

4. For converted records, all task actions from FM (formerly the information we got by using the “blue button”) have been converted to the FT Record > Setups > Attributes.

5. There are also several reports you can run. See the SOP for reports for details.

Find a SpeedType

Fastest route to find a SpeedType is to go to the PT record > Financials > Hover cursor over Account number. The window shows what that project is for (Main, Sub, Participant support, etc.), SpeedType and PI.

Resources

- [http://www.colorado.edu/vcr/resources/electronic-research-administration](http://www.colorado.edu/vcr/resources/electronic-research-administration)
- Boulder eRA website will be live for go live with documentation and tools – guides, crosswalk/navigation guide
- PT SOPs – will be called user guide
- Z drive > Administration – IT > InfoEd Documents > Go-Live Documentation