ROAMWyo

Research Organization
Administration and Management

Sponsored Projects (SP) Module:

Viewing Proposals & Awards

University of Wyoming
Research & Economic Development Division (REDD)
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Title:	Process Owner:	Approved By:
Sponsored Projects (SP) Module: Viewing Awards & Proposals	University of Wyoming, Research & Economic Development Department	Farrell Rapp, Director, Research Services
Date Approved:	**Effective Date:**	**Date of next review:**
5/30/2023	6/1/2023	5/31/2024

Purpose: This purpose of this document is provide an overview of the process for the ROAMWyo Sponsored Projects Module.

Table of Contents

PROJECTS DASHBOARD **2**

PROPOSALS DASHBOARD & FORM **3**

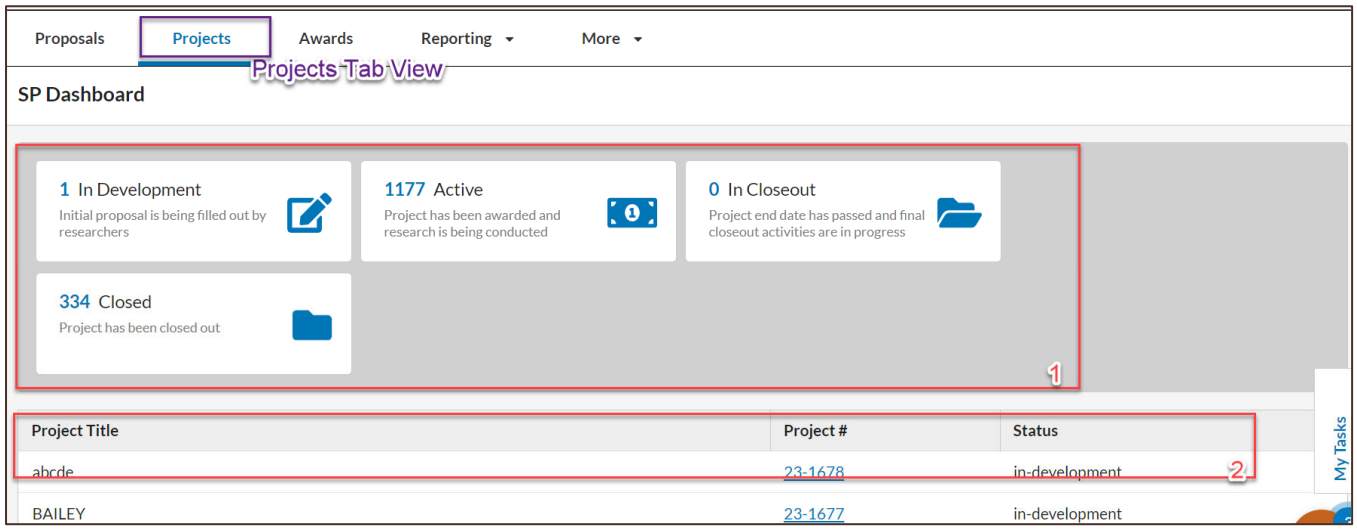
AWARDS DASHBOARD & FORM **6**

SUBAWARDS **9**

ROAMWyo

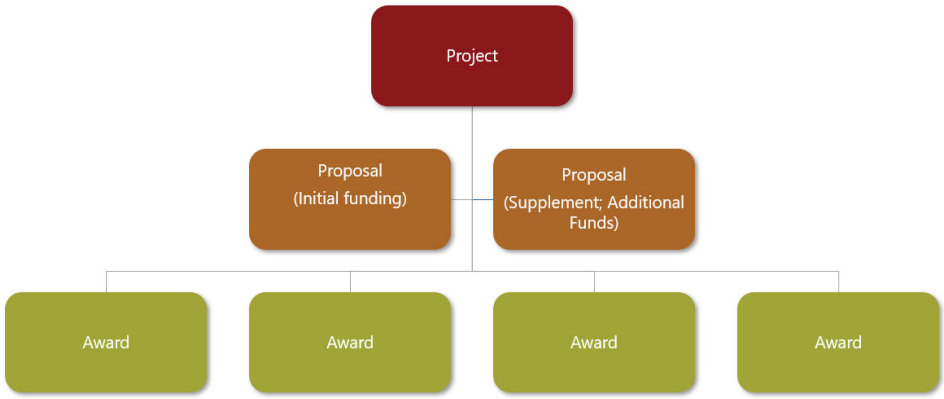
PROJECTS DASHBOARD

Image 1. ROAMWyo Projects Dashboard



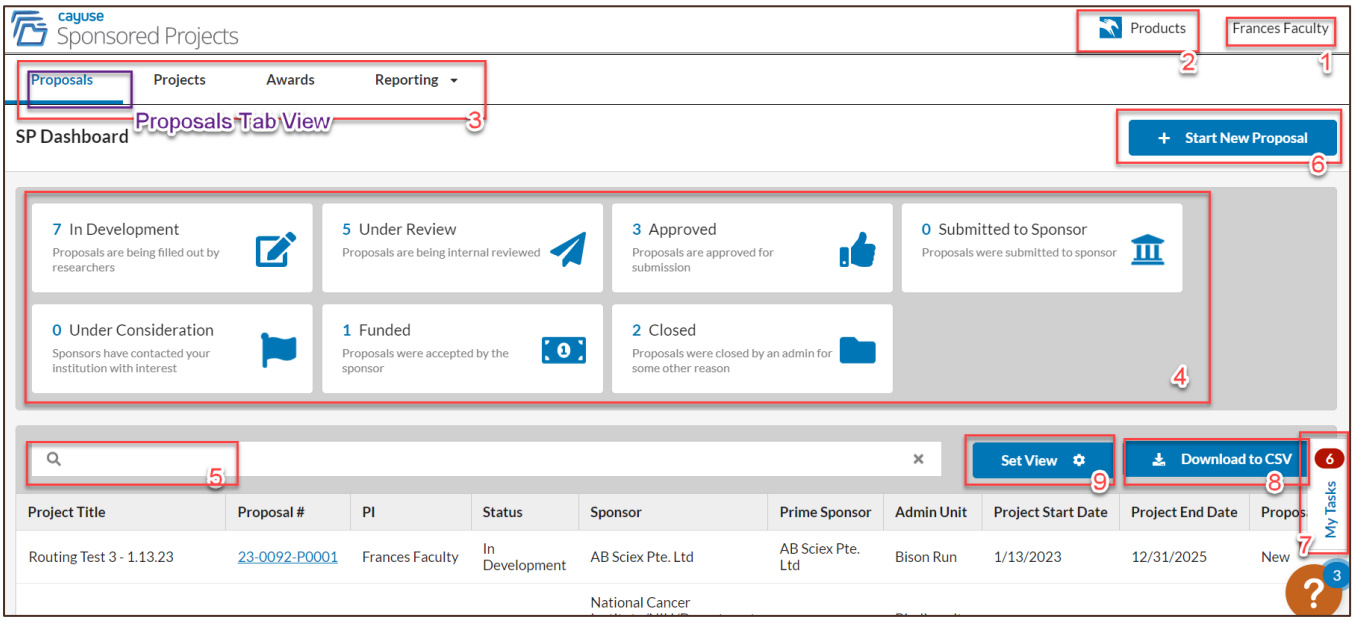
1. **Status Tiles** direct the user to proposals organized by progress status.
    a. **In Development:** a researcher or department administrator is completing a new proposal form
    b. **Active:** projects have received funding and research is being conducted
    c. **In Closeout:** Pre-Award Services are collecting final reports and preparing the award for final closeout
    d. **Closed**: a project which research work has concluded and final reports have been submitted.
2. **Project Listing** select the hyperlinked project number to view project details.

Note: Project is the overarching umbrella for a group of proposals and awards related to the same area of study under one sponsor (Project → Proposal → Award). A proposal is a request for funding from an individual sponsor to carry out a specified objective, or a request for a supplement or additional funding for an existing award. An Award is funding received from an individual sponsor to carry out a proposed specified objective. Proposal: Award can be 1:1 or 1: Many.



PROPOSALS DASHBOARD & FORM

Image 2. ROAMWyo Proposals Dashboard



1. **Username** expands into a dropdown menu and includes the user's profile section
2. **Product Selector** expands into a dropdown menu to toggle between ROAMWyo modules
3. **SP Menu** directs the user to the **Proposals, Projects, Awards,** and **Reporting**
4. **Status Tiles** direct the user to proposals organized by progress status
    a. **In Development:** a researcher or department administrator is completing a new proposal form
    b. **Under Review:** a proposal form is under internal review
    c. **Approved**: a proposal form has been approved
    d. **Submitted to Sponsor**: proposal has been submitted to Sponsor
    e. **Under Consideration:** Sponsor has contacted the institution with interest in funding.
    f. **Funded:** Proposal was accepted for funding by the Sponsor
    g. **Closed:** Proposal record has been closed.
5. **Search Bar** is used to search for projects and proposals. Follow the steps below to initiate a search.
    a. Click in the Search bar to reveal a list of search categories to choose from
    b. Scroll through the category list to select how you want to filter the list or type in the filter category, for example type "PI" to search by PI
    c. Select the relevant search category from the list
    d. Enter, in the blue search box, the PI's name to search by
    e. Select the hyperlinked proposal number to open the record
6. **+Start New Proposal** begins the proposal development process (see SP: Proposal Development SOP)
7. **My Tasks** a shortcut to the User's task list
8. **Download to CSV** exports the proposal list to an Excel file

9. **Set View** customizes the User's view (The list can show a maximum of eleven columns at a time and the view will have to be readjusted at the start of each session)

Image 2a and 2b. Search Functionality

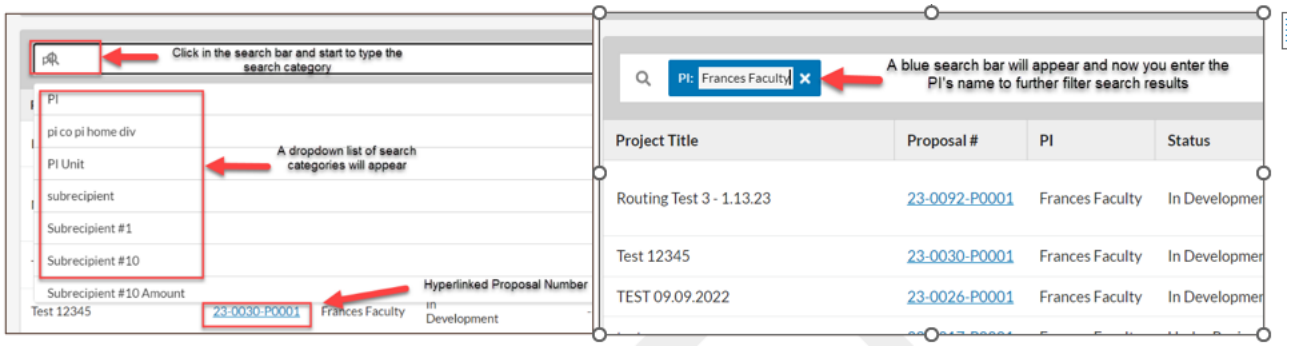
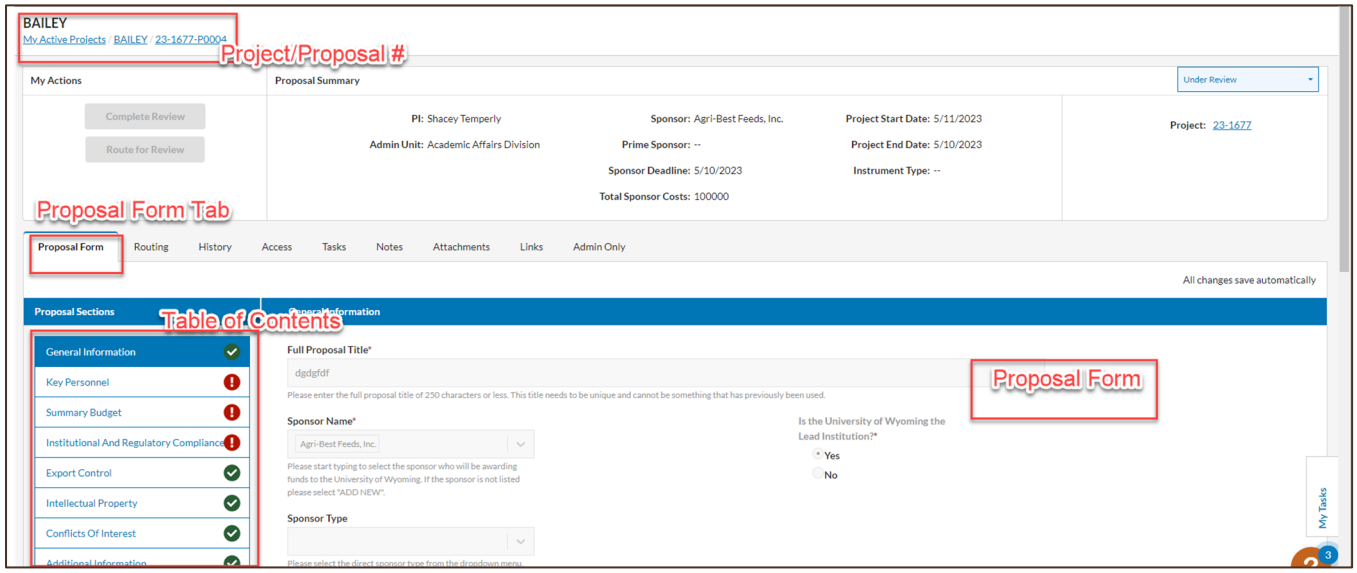
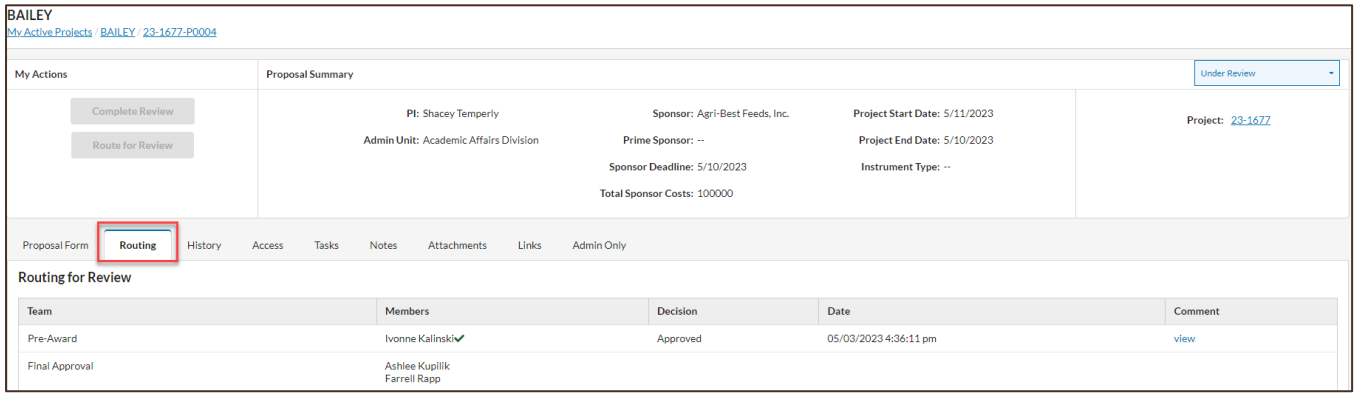


Image 3. Proposal Form Overview



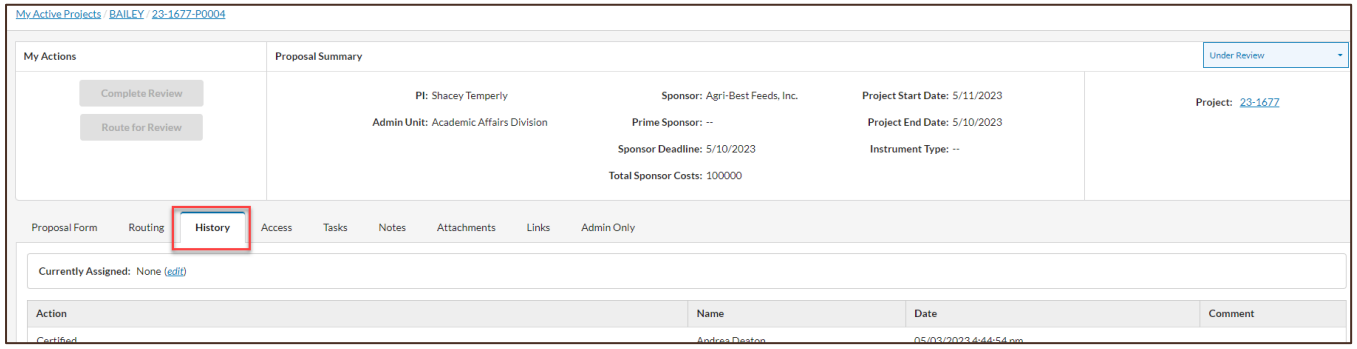
Use the **Proposal Form** tab to view a proposal record. Use the **Table of Contents** to navigate to the various form sections.

Image 4. Proposal Form Routing Tab



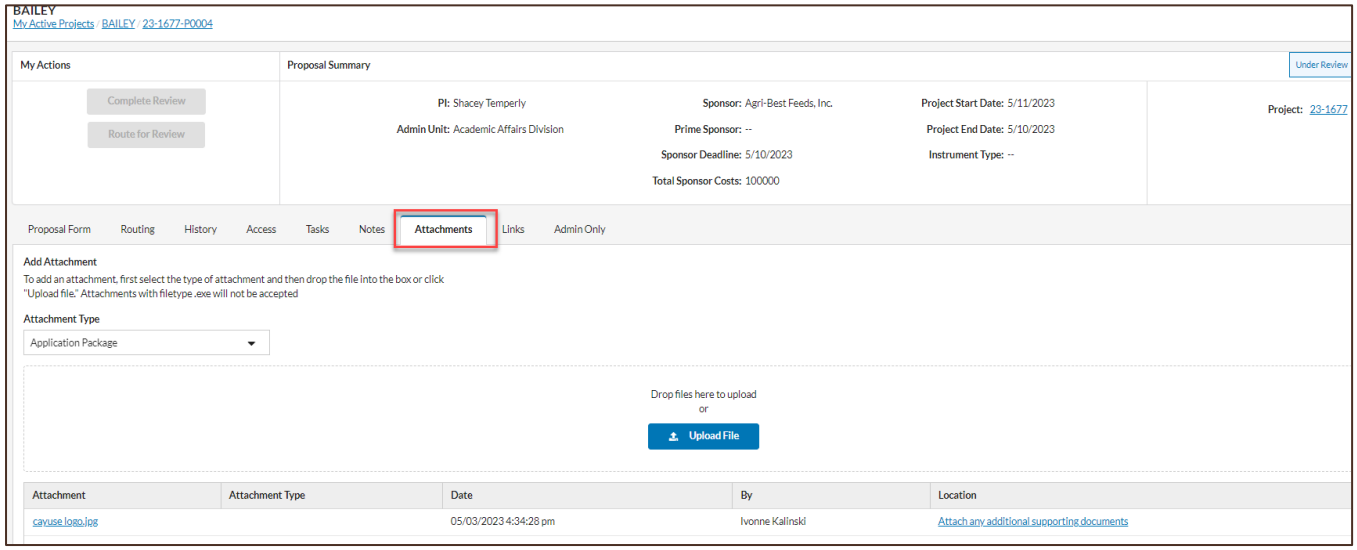
Use the **Routing tab** to see where the proposal is in the routing process.

Image 5. Proposal Form History Tab



Use the **History tab** to view the historic activity on the proposal (certifications, status changes, comments, etc.).

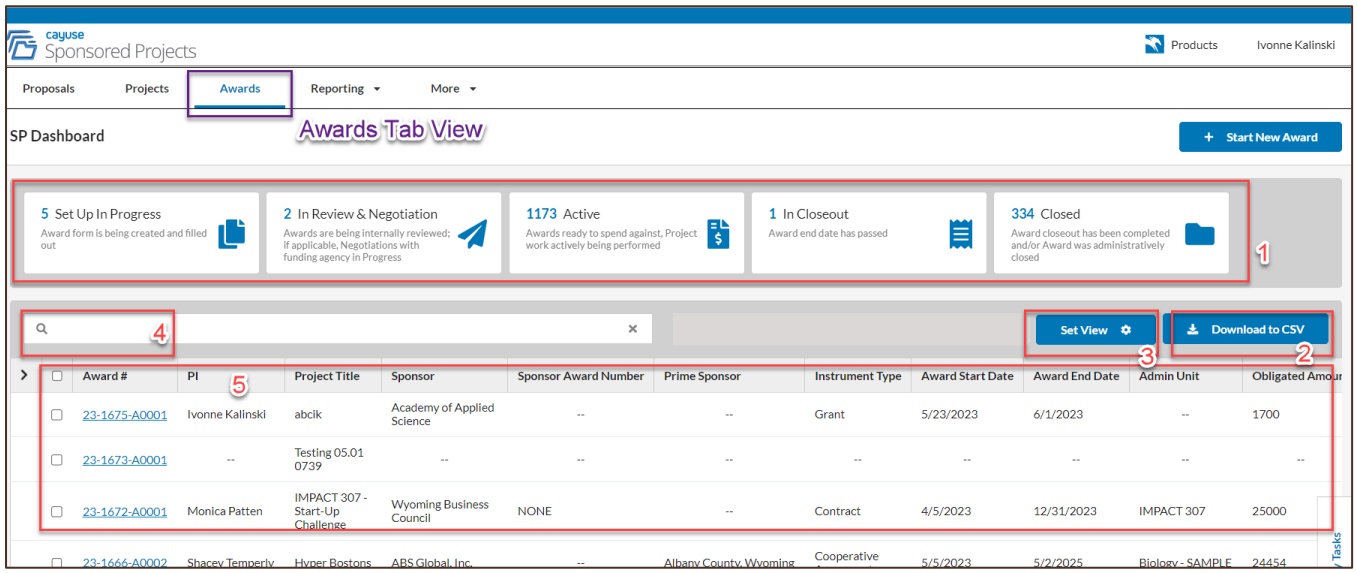
Image 6. Proposal Form Attachments Tab



Use the **Attachments tab** to view attachments related to the proposal.

AWARDS DASHBOARD & FORM

Image 7. ROAMWyo Awards Dashboard



1. **Status Tiles** direct the user to proposals organized by progress status
    a. **Set Up In Progress:** Award form is being created and filled out by the Pre-Award Services team, including the review and negotiation of any award terms and conditions
    b. **In Review & Negotiation**: NOT being used as labeled. **ONLY** being used to send notifications to particular units. Awards are being review and negotiated in the Set Up In Progress status tile
    c. **Active:** Award is active
    d. **In Closeout:** Award end date has passed and is in the process of being closed.
    e. **Closed**: Award closeout has been completed and/or award was administratively closed.
2. **Download to CSV** exports the proposal list to an Excel file
3. **Set View** customizes the User's view
4. **Search Bar** is used to search for projects and proposals. Follow the steps below to initiate a search.
    a. Click in the Search bar to reveal a list of search categories to choose from
    b. Scroll through the category list to select how you want to filter the list or type in the filter category, for example type "PI" to search by PI
    c. Select the relevant search category from the list
    d. Enter, in the blue search box, the PI's name to search by
    e. Select the hyperlinked proposal number to open the record
5. **Awards Listing** select the hyperlinked award number to view award details

Image 7a and 7b. Search Functionality

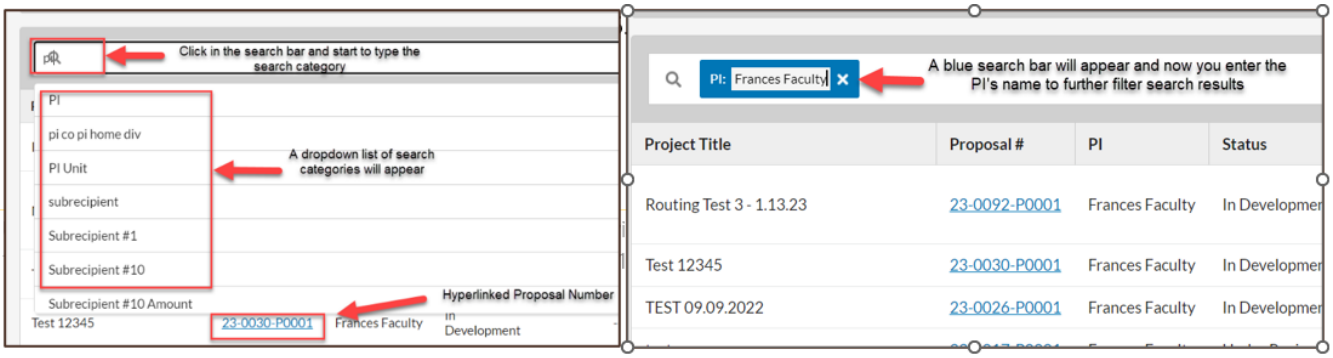
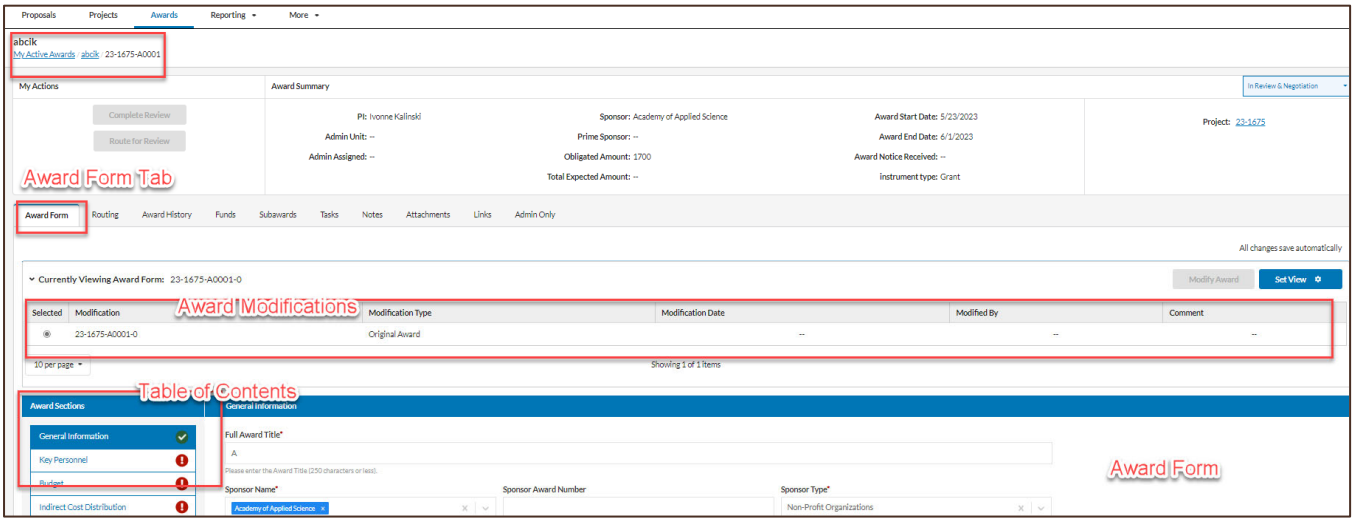
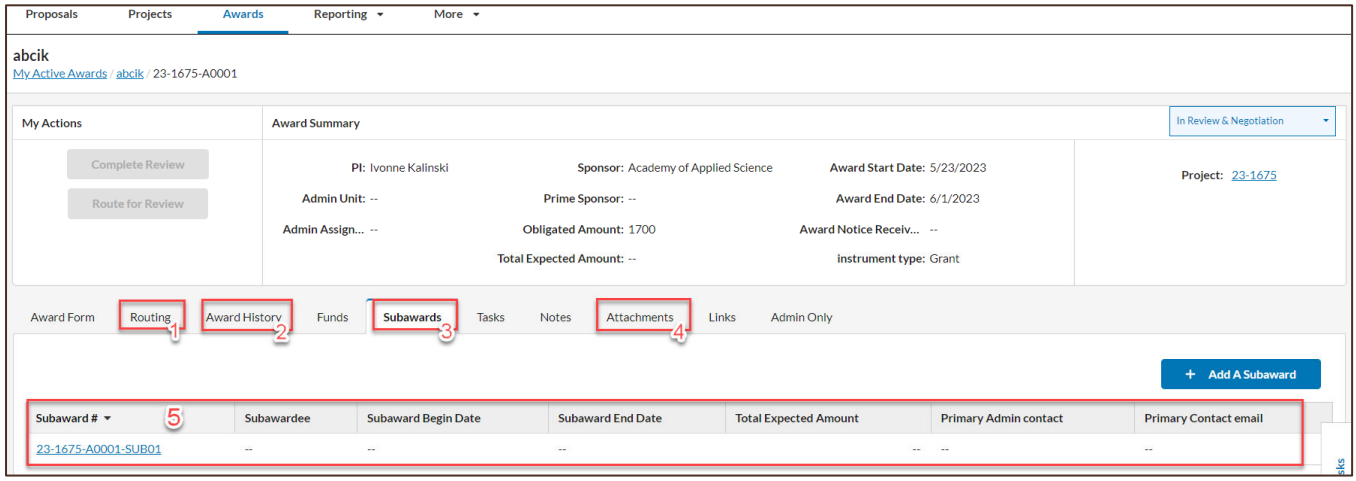


Image 8. Awards Form Overview



The Award form is created by Research and Economic Development Division Pre-Award Services; therefore, you will only have viewer access for awards and award modifications.

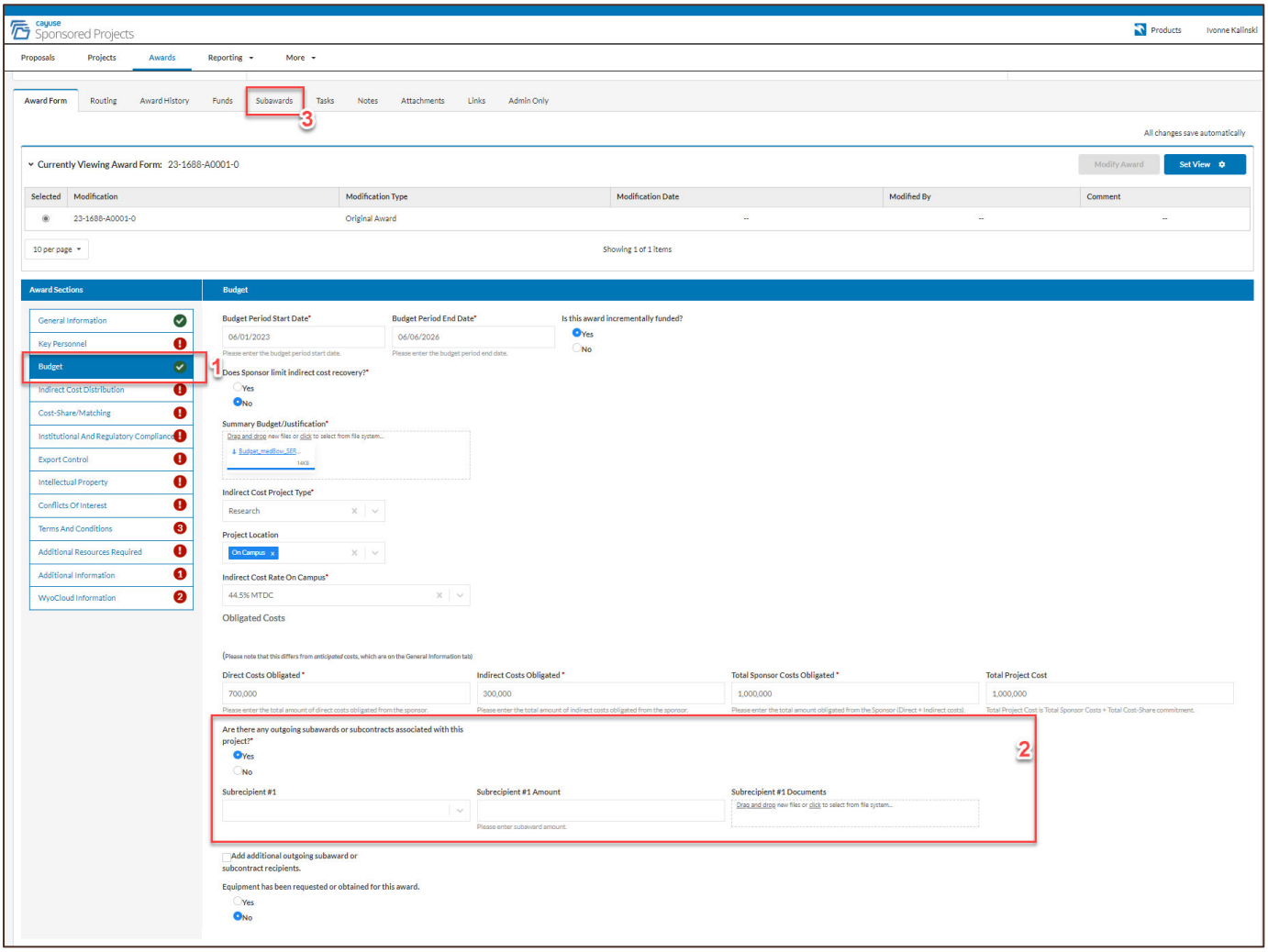
Image 9. Award Record Tabs



1. **Routing** tab is used to see where the Award is in the routing process. There is currently no routing of the award form.
2. **Award History** is used to see the history of activities related to the award
3. **Subawards** is used to view the subaward information
4. **Attachments** is used to store attachments relevant to the award and its activities
5. **Subawards Listing** select the hyperlinked award number to view award details

SUBAWARDS

Image 10. Where Subaward Information is stored



1. First navigate to the **Budget** section, where the Subawards are first mentioned (see Image 12)
2. Scroll down to **"Are there any outgoing subawards or subcontracts associated with this project?"** to learn if the award includes Subaward(s). If yes, the Subaward details are required to be entered in the Subawards form. (see this Budget section close-up in Image 11)
3. **Subawards** tab is where the Subaward Form is located and includes the subaward details (see Image 14 for a look inside the Subawards form).

Image 11. Summary Budget section of the Proposal Form - where a subaward recipient is first indicated

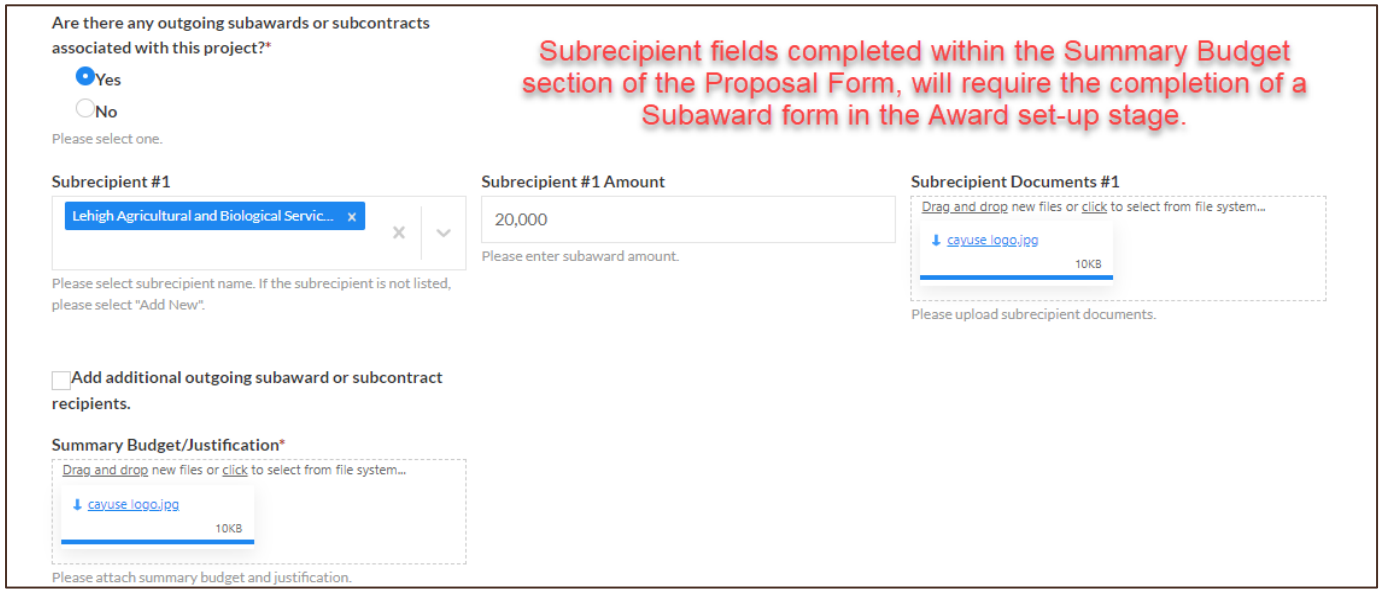


Image 12. Award Form - where a subaward recipient is indicated initially on an award form during set-up

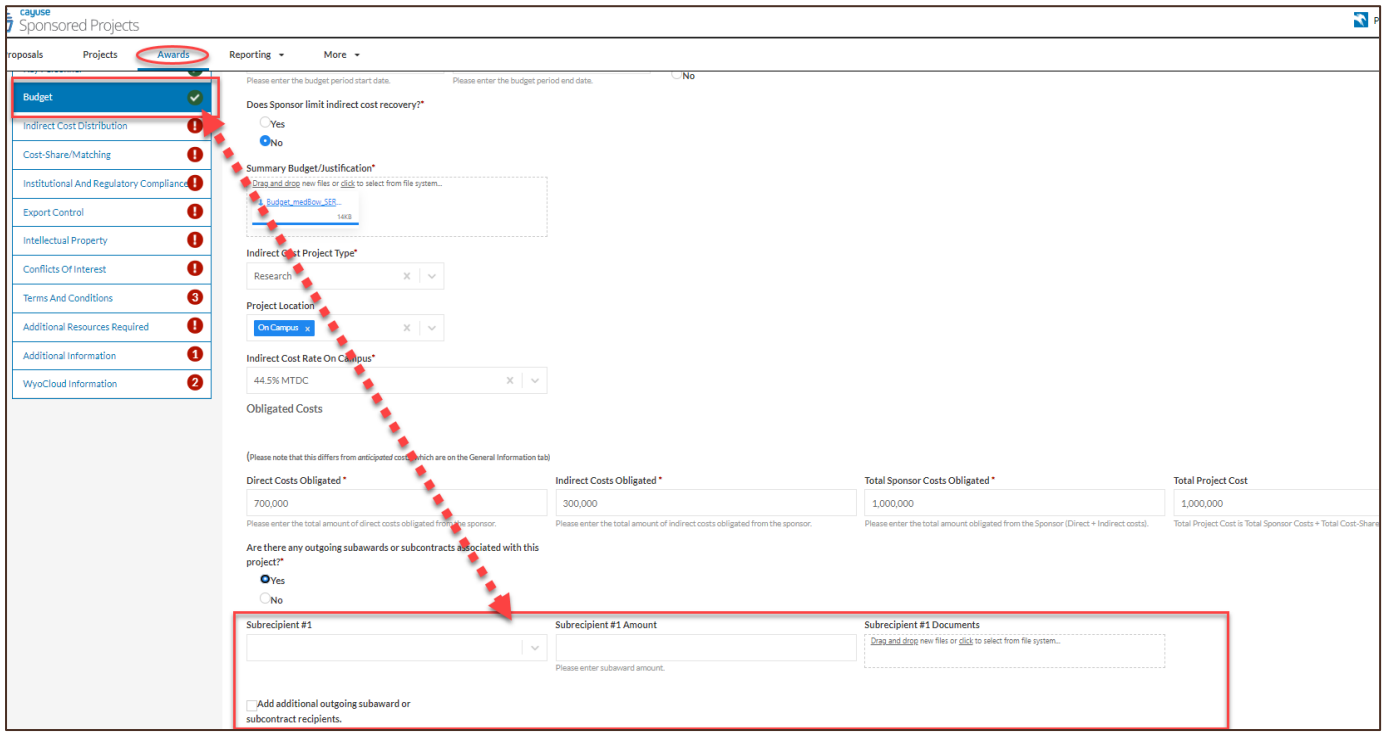


Image 13. View the details of the Subaward form here

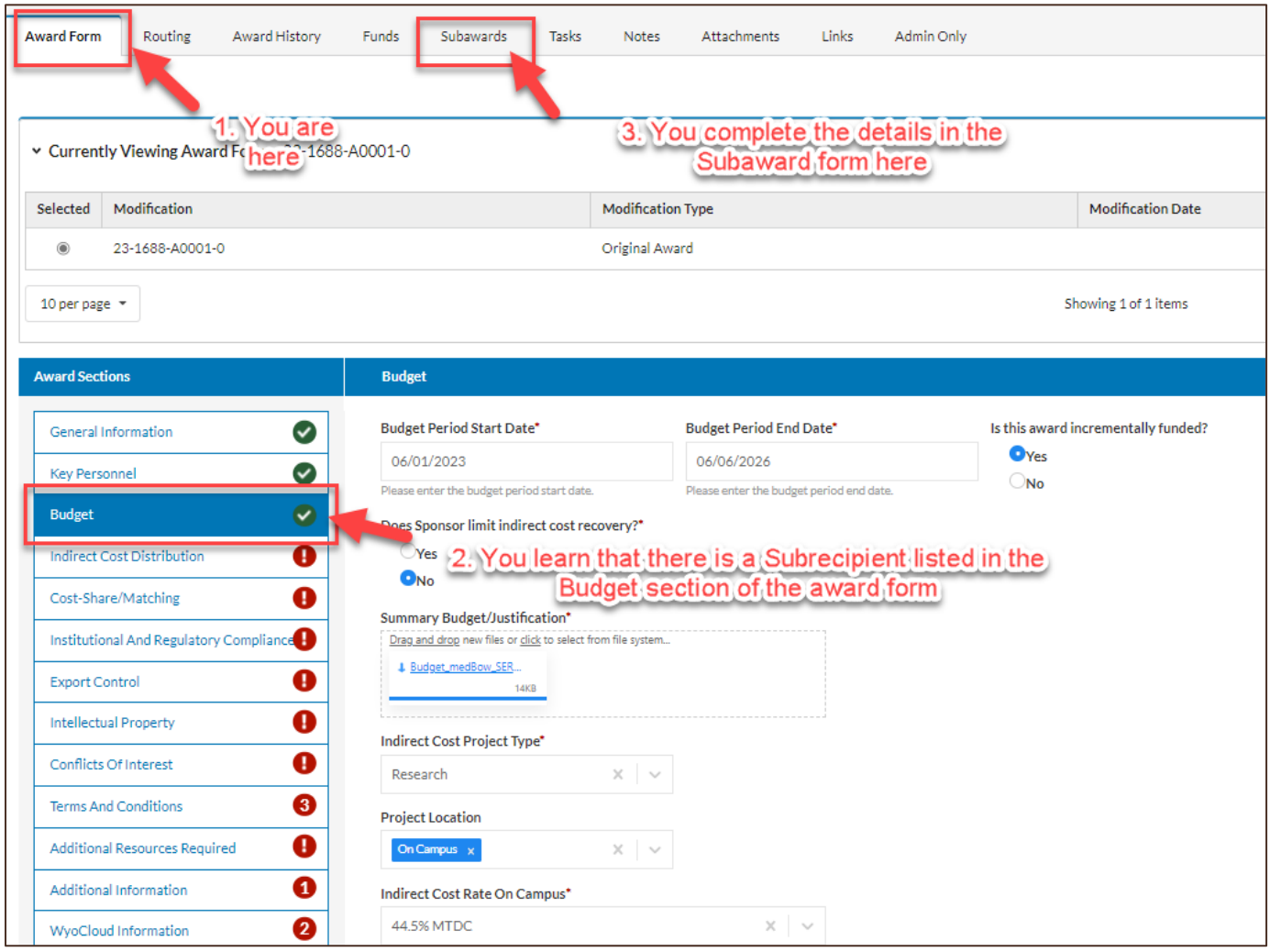


Image 14. Inside the Subaward Form (step 3 in Image 13)

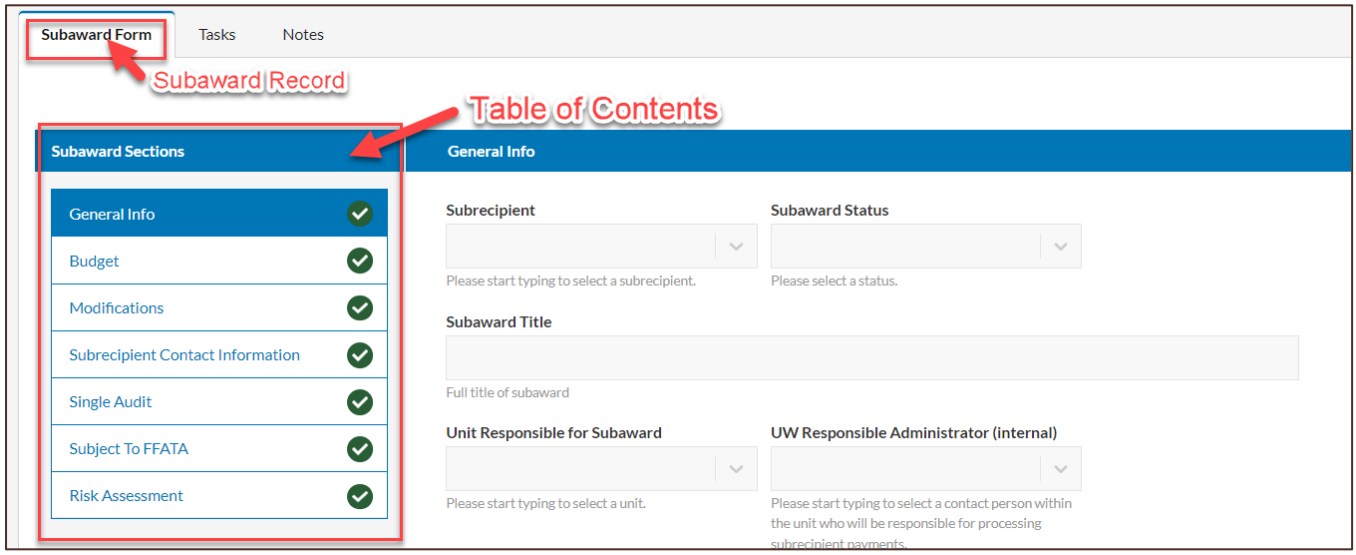


Table of Contents for Subaward Sections. Subaward records are created and completed by the Pre-Award Services staff.