



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

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

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PROJECTS DASHBOARD

Image 1. ROAMWyo Projects Dashboard

SP Dashboard

1 In Development
Initial proposal is being filled out by researchers

1177 Active
Project has been awarded and research is being conducted

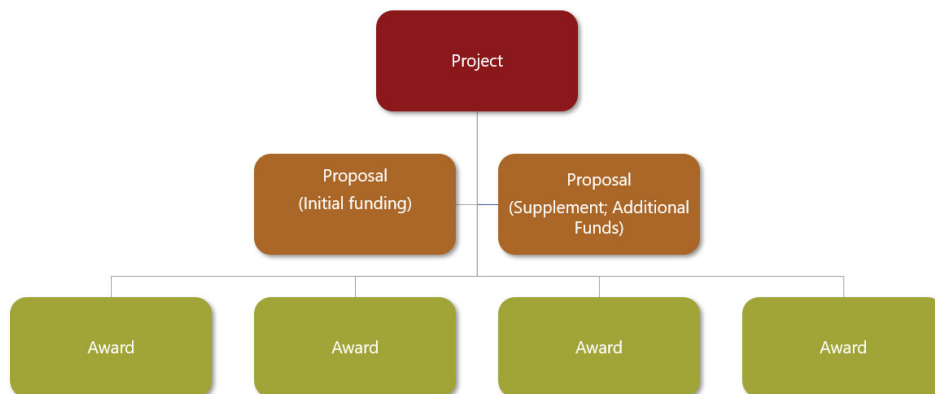
0 In Closeout
Project end date has passed and final closeout activities are in progress

334 Closed
Project has been closed out

Project Title	Project #	Status
abcde	23-1678	in-development
BAILEY	23-1677	in-development

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

The screenshot shows the ROAMWyo Proposals Dashboard interface. At the top left is the 'cayuse Sponsored Projects' logo. On the top right, there is a 'Products' dropdown menu (2) and a user profile section for 'Frances Faculty' (1). Below the logo is a navigation menu with 'Proposals' (3), 'Projects', 'Awards', and 'Reporting'. A 'Start New Proposal' button (6) is located on the right side. The main area contains eight status tiles (4) representing different stages of proposal development: '7 In Development', '5 Under Review', '3 Approved', '0 Submitted to Sponsor', '0 Under Consideration', '1 Funded', and '2 Closed'. Below the tiles is a search bar (5) and buttons for 'Set View' (9) and 'Download to CSV' (8). At the bottom, a table lists project details, including columns for Project Title, Proposal #, PI, Status, Sponsor, Prime Sponsor, Admin Unit, Project Start Date, Project End Date, and Proposal Status. A 'My Tasks' icon (7) and a help icon (3) are also visible.

Project Title	Proposal #	PI	Status	Sponsor	Prime Sponsor	Admin Unit	Project Start Date	Project End Date	Propos
Routing Test 3 - 1.13.23	23-0092-P0001	Frances Faculty	In Development	AB Sciex Pte. Ltd	AB Sciex Pte. Ltd	Bison Run	1/13/2023	12/31/2025	New
National Cancer									

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

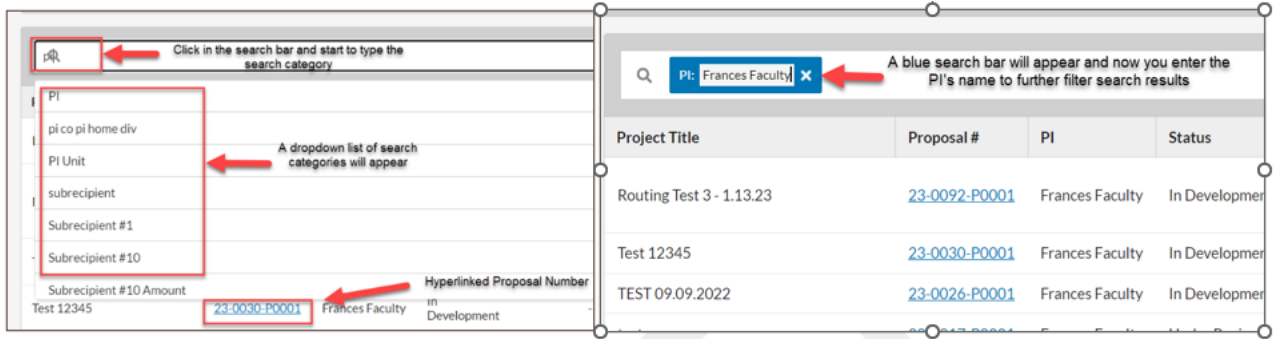
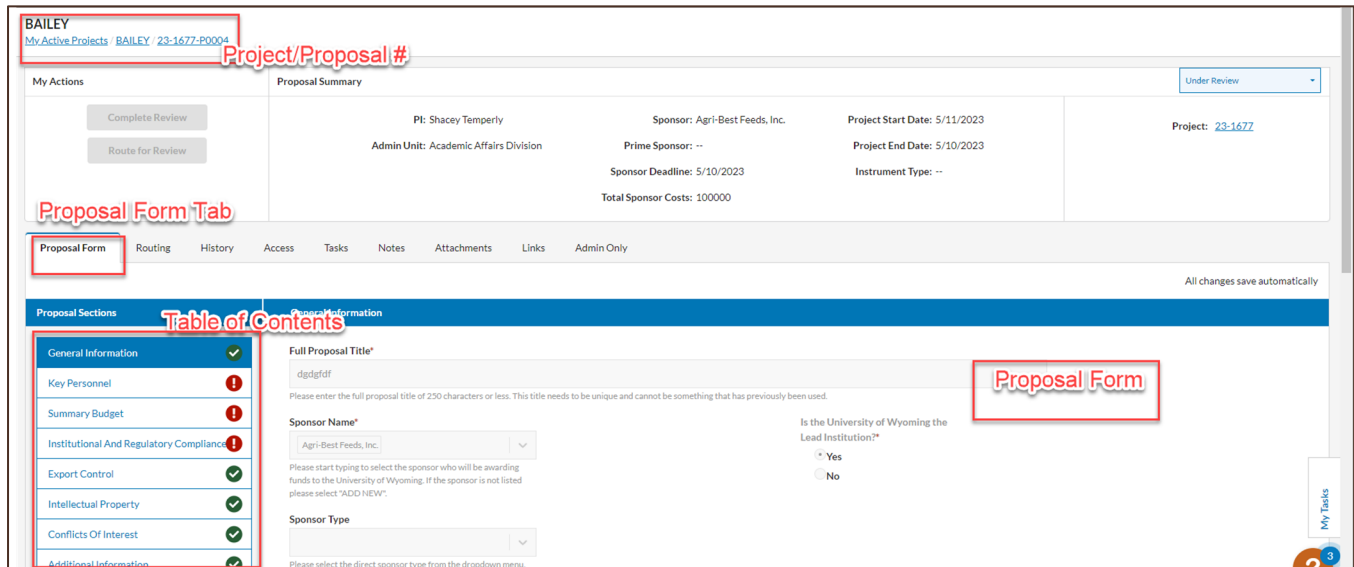


Image 3. Proposal Form Overview



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

BAILEY
[My Active Projects](#) / [BAILEY / 23-1677-P0004](#)

My Actions: Complete Review, Route for Review

Proposal Summary: PI: Shacey Temperly, Sponsor: Agri-Best Feeds, Inc., Project Start Date: 5/11/2023, Project End Date: 5/10/2023, Instrument Type: --, Project: [23-1677](#)

Proposal Form **Routing** History Access Tasks Notes Attachments Links Admin Only

Routing for Review

Team	Members	Decision	Date	Comment
Pre-Award	Ivonne Kalinski ✓	Approved	05/03/2023 4:36:11 pm	view
Final Approval	Ashlee Kuplik Farrell Rapp			

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

Image 5. Proposal Form History Tab

BAILEY
[My Active Projects](#) / [BAILEY / 23-1677-P0004](#)

My Actions: Complete Review, Route for Review

Proposal Summary: PI: Shacey Temperly, Sponsor: Agri-Best Feeds, Inc., Project Start Date: 5/11/2023, Project End Date: 5/10/2023, Instrument Type: --, Project: [23-1677](#)

Proposal Form Routing **History** Access Tasks Notes Attachments Links Admin Only

Currently Assigned: None ([edit](#))

Action	Name	Date	Comment
Certified	Andreas Deston	05/03/2023 4:44:54 pm	

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

Image 6. Proposal Form Attachments Tab

BAILEY
[My Active Projects](#) / [BAILEY / 23-1677-P0004](#)

My Actions: Complete Review, Route for Review

Proposal Summary: PI: Shacey Temperly, Sponsor: Agri-Best Feeds, Inc., Project Start Date: 5/11/2023, Project End Date: 5/10/2023, Instrument Type: --, Project: [23-1677](#)

Proposal Form Routing History Access Tasks Notes **Attachments** Links Admin Only

Add Attachment
To add an attachment, first select the type of attachment and then drop the file into the box or click "Upload file." Attachments with filetype .exe will not be accepted

Attachment Type: Application Package

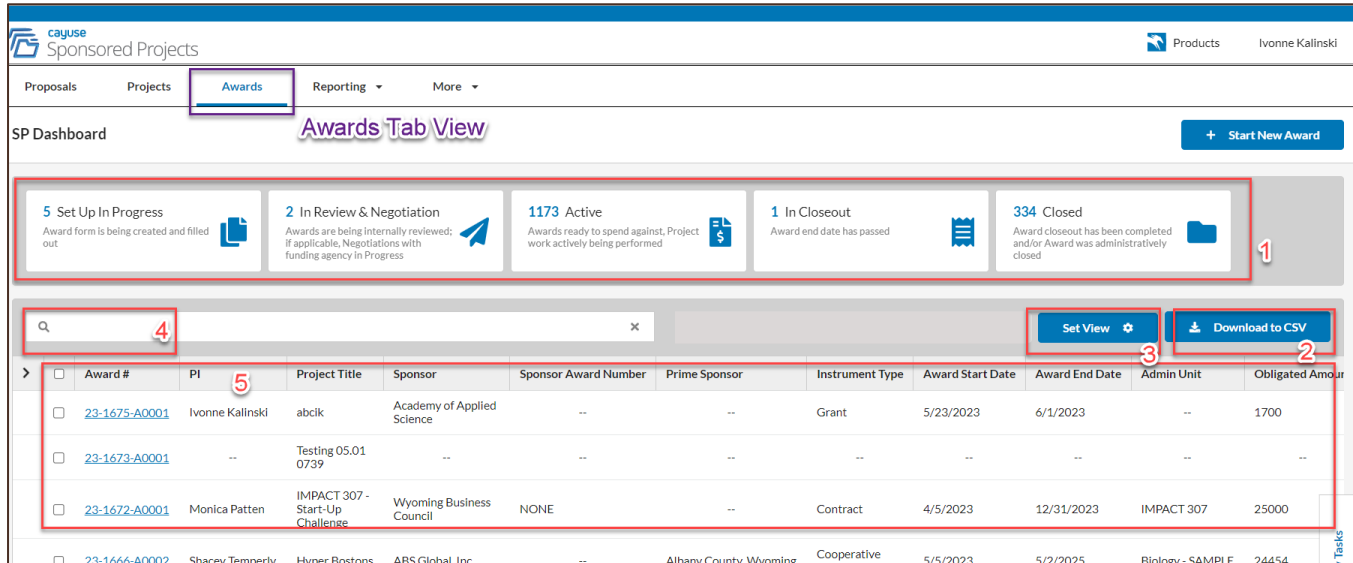
Drop files here to upload or [Upload File](#)

Attachment	Attachment Type	Date	By	Location
cayuse.ora.ora		05/03/2023 4:34:28 pm	Ivonne Kalinski	Attach any additional supporting documents

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

AWARDS DASHBOARD & FORM

Image 7. ROAMWyo Awards Dashboard



Award #	PI	Project Title	Sponsor	Sponsor Award Number	Prime Sponsor	Instrument Type	Award Start Date	Award End Date	Admin Unit	Obligated Amount
23-1675-A0001	Ivonne Kalinski	abclik	Academy of Applied Science	--	--	Grant	5/23/2023	6/1/2023	--	1700
23-1673-A0001	--	Testing 05.01 0739	--	--	--	--	--	--	--	--
23-1672-A0001	Monica Patten	IMPACT 307 - Start-Up Challenge	Wyoming Business Council	NONE	--	Contract	4/5/2023	12/31/2023	IMPACT 307	25000

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

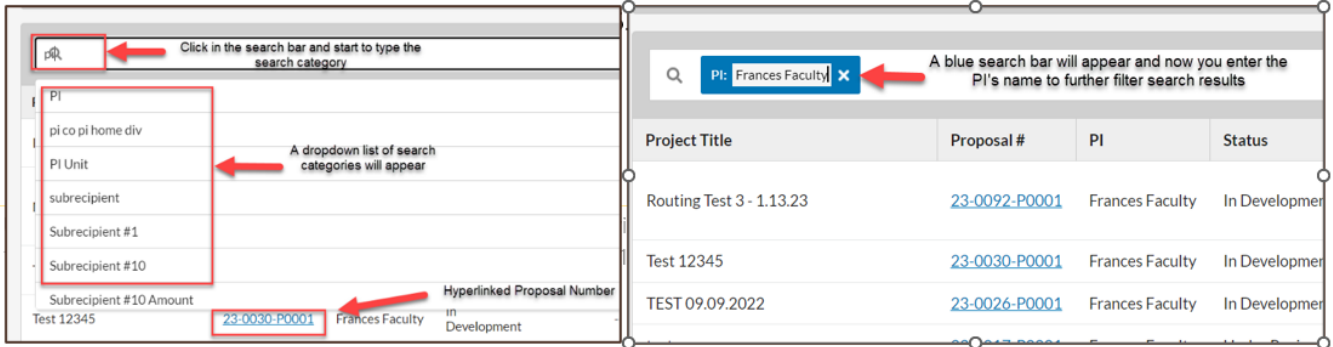
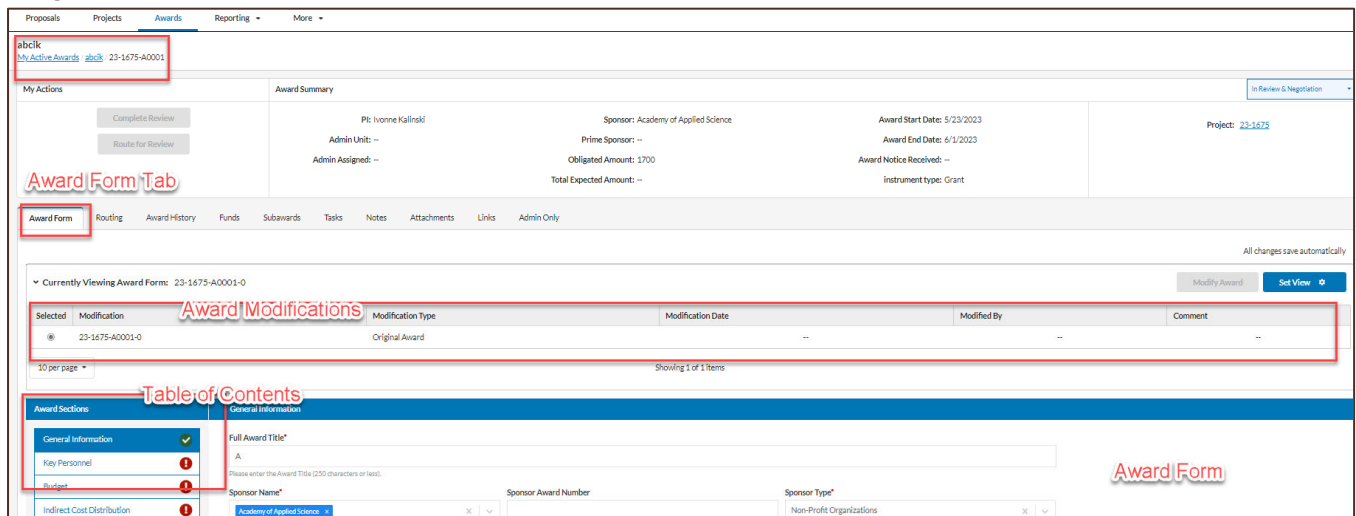


Image 8. Awards Form Overview



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

abcik
My Active Awards / abcik / 23-1675-A0001

My Actions: Complete Review, Route for Review

Award Summary: In Review & Negotiation

PI: Ivonne Kalinski, Sponsor: Academy of Applied Science, Award Start Date: 5/23/2023, Project: 23-1675
Admin Unit: --, Prime Sponsor: --, Award End Date: 6/1/2023
Admin Assign...: --, Obligated Amount: 1700, Award Notice Receiv...: --
Total Expected Amount: --, Instrument type: Grant

Award Form, Routing, Award History, Funds, Subawards, Tasks, Notes, Attachments, Links, Admin Only

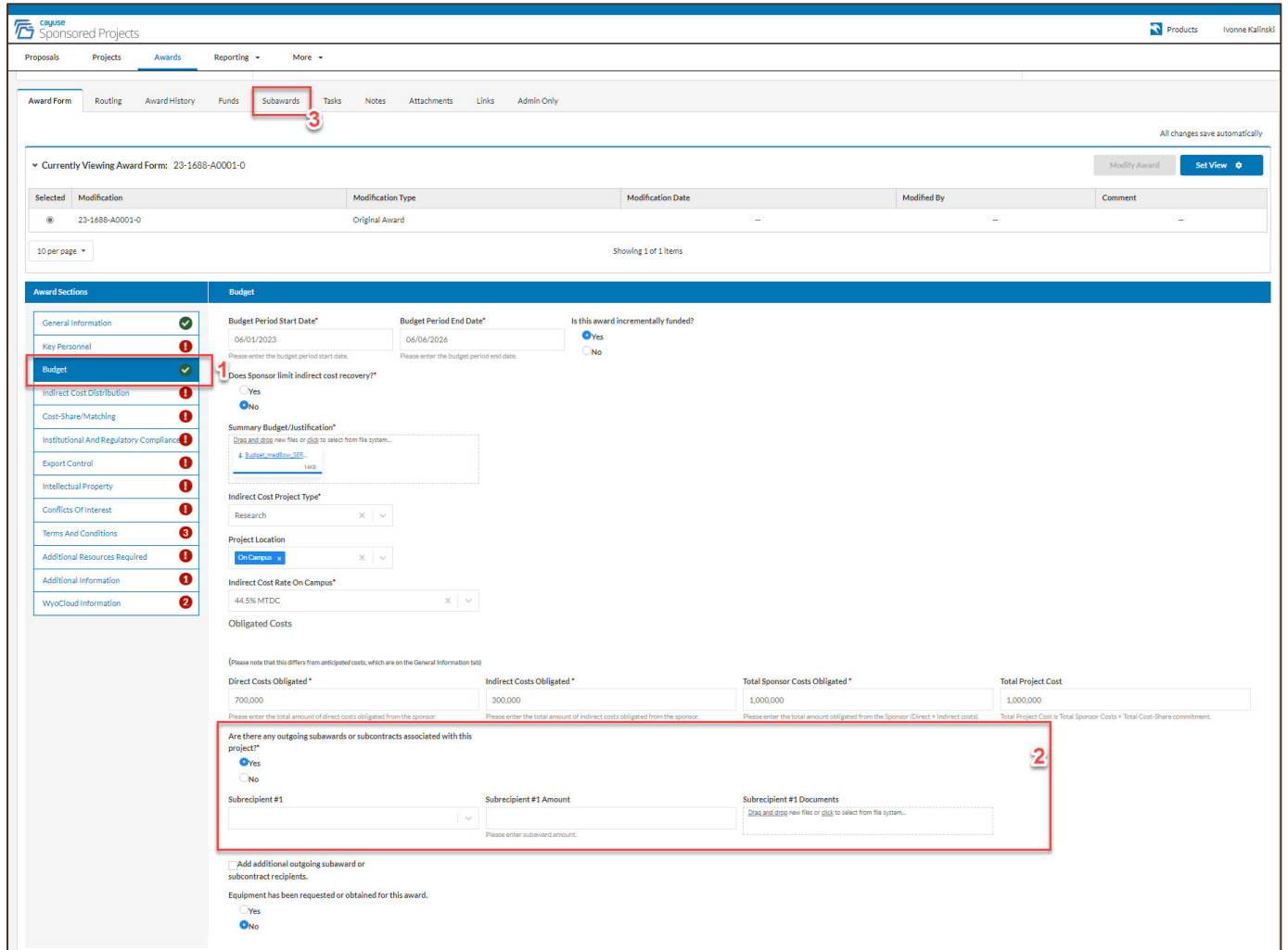
+ Add A Subaward

Subaward #	Subawardee	Subaward Begin Date	Subaward End Date	Total Expected Amount	Primary Admin contact	Primary Contact email
23-1675-A0001-SUB01	--	--	--	--	--	--

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



The screenshot shows the 'Sponsored Projects' interface. The top navigation bar includes 'Proposals', 'Projects', 'Awards', 'Reporting', and 'More'. The 'Subawards' tab is highlighted with a red box and the number 3. The main content area shows the 'Award Form' for '23-1688-A0001-0'. The 'Budget' section is highlighted with a red box and the number 1. It includes fields for 'Budget Period Start Date' (06/01/2023), 'Budget Period End Date' (06/06/2026), and a radio button for 'Is this award incrementally funded?' (Yes). Below this is a section for 'Does Sponsor limit indirect cost recovery?' with a radio button for 'No'. The 'Summary Budget/Justification' section contains a file upload field. The 'Indirect Cost Project Type' is set to 'Research'. The 'Project Location' is 'On Campus'. The 'Indirect Cost Rate On Campus' is '44.5% MTDC'. The 'Obligated Costs' section shows a table with columns for 'Direct Costs Obligated', 'Indirect Costs Obligated', 'Total Sponsor Costs Obligated', and 'Total Project Cost'. The values are 700,000, 300,000, 1,000,000, and 1,000,000 respectively. A red box and the number 2 highlight the question 'Are there any outgoing subawards or subcontracts associated with this project?' with radio buttons for 'Yes' and 'No'. Below this are fields for 'Subrecipient #1' and 'Subrecipient #1 Documents'. The 'Subrecipient #1' field has a dropdown menu and a text input field. The 'Subrecipient #1 Documents' field has a file upload button. The 'Add additional outgoing subaward or subcontract recipients' checkbox is unchecked. The 'Equipment has been requested or obtained for this award' radio button is set to 'No'.

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

Are there any outgoing subawards or subcontracts associated with this project?*

Yes

No

Please select one.

Subrecipient #1

Lehigh Agricultural and Biological Service... x

Please select subrecipient name. If the subrecipient is not listed, please select "Add New".

Add additional outgoing subaward or subcontract recipients.

Summary Budget/Justification*

Drag and drop new files or click to select from file system...

cavuse_logo.jpg 10KB

Please attach summary budget and justification.

Subrecipient #1 Amount

20,000

Please enter subaward amount.

Subrecipient Documents #1

Drag and drop new files or click to select from file system...

cavuse_logo.jpg 10KB

Please upload subrecipient documents.

Subrecipient fields completed within the Summary Budget section of the Proposal Form, will require the completion of a Subaward form in the Award set-up stage.

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

Sponsored Projects

Proposals Projects Awards Reporting More

Budget ✓

Indirect Cost Distribution 1

Cost-Share/Matching 1

Institutional And Regulatory Compliance 1

Export Control 1

Intellectual Property 1

Conflicts Of Interest 1

Terms And Conditions 3

Additional Resources Required 1

Additional Information 1

Wyocloud Information 2

Does Sponsor limit indirect cost recovery?*

Yes

No

Summary Budget/Justification*

Drag and drop new files or click to select from file system...

Budget_msd@ow_58- 14KB

Indirect Cost Project Type*

Research x

Project Location

On Campus x

Indirect Cost Rate On Campus*

44.5% MTDC x

Obligated Costs

(Please note that this differs from anticipated costs, which are on the General Information tab)

Direct Costs Obligated *	Indirect Costs Obligated *	Total Sponsor Costs Obligated *	Total Project Cost
700,000	300,000	1,000,000	1,000,000

Please enter the total amount of direct costs obligated from the sponsor. Please enter the total amount of indirect costs obligated from the sponsor. Please enter the total amount obligated from the Sponsor (Direct + Indirect costs). Total Project Cost is Total Sponsor Costs + Total Cost-Share

Are there any outgoing subawards or subcontracts associated with this project?*

Yes

No

Subrecipient #1

Subrecipient #1 Amount

Please enter subaward amount.

Subrecipient #1 Documents

Drag and drop new files or click to select from file system...

Add additional outgoing subaward or subcontract recipients.



Image 13. View the details of the Subaward form here

The screenshot displays the 'Award Form' interface with the 'Subawards' tab selected. A table lists the award modification details:

Selected	Modification	Modification Type	Modification Date
<input checked="" type="radio"/>	23-1688-A0001-0	Original Award	

Below the table, the 'Award Sections' sidebar is visible, with the 'Budget' section highlighted. The main content area shows the 'Budget' form with the following fields:

- Budget Period Start Date***: 06/01/2023
- Budget Period End Date***: 06/06/2026
- Is this award incrementally funded?**: Yes, No
- Does Sponsor limit indirect cost recovery?***: Yes, No
- Summary Budget/Justification***: Includes a file upload section with a file named 'Budget_medBow_SEB...' (14KB).
- Indirect Cost Project Type***: Research
- Project Location**: On Campus
- Indirect Cost Rate On Campus***: 44.5% MTDC

Red callouts and arrows provide instructions: '1. You are here' points to the 'Award Form' tab; '2. You learn that there is a Subrecipient listed in the Budget section of the award form' points to the 'Budget' section in the sidebar; '3. You complete the details in the Subaward form here' points to the 'Subawards' tab.



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

The screenshot displays the 'Subaward Form' interface. At the top, there are tabs for 'Subaward Form', 'Tasks', and 'Notes'. The 'Subaward Form' tab is highlighted with a red box and an arrow labeled 'Subaward Record'. Below the tabs is a 'Table of Contents' sidebar on the left, which lists the following sections with green checkmarks: General Info, Budget, Modifications, Subrecipient Contact Information, Single Audit, Subject To FFATA, and Risk Assessment. The main form area is titled 'General Info' and contains several fields: 'Subrecipient' (a dropdown menu with the placeholder 'Please start typing to select a subrecipient.'), 'Subaward Status' (a dropdown menu with the placeholder 'Please select a status.'), 'Subaward Title' (a text input field with the placeholder 'Full title of subaward'), 'Unit Responsible for Subaward' (a dropdown menu with the placeholder 'Please start typing to select a unit.'), and 'UW Responsible Administrator (internal)' (a dropdown menu with the placeholder 'Please start typing to select a contact person within the unit who will be responsible for processing subrecipient payments.').

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