InfoEd

University of Wyoming
Proposal Tracking (PT) / Award Tracking (AT)
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(Proposal Tracking (PT) contains the submitted budget/proposal to a sponsor, all project documents, and correspondence with both the sponsor and University personnel. PT houses Deliverables (reporting requirements from the sponsor), invoices, cash receipts and technical reports.) Also houses the fund, org, project ID, IC Rate/Base.

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(Award Tracking provides information regarding the actual budget and cost share if required. Here you can also see which OSP coordinator is assigned to the record/project you are looking at along with any additional personnel assigned to the project.)

Special Notes ........................................................................

• When navigating through the software, always click “Done” (upper left-hand corner) when possible. If you close a window, by clicking the “X” (upper right-hand corner), the window will close however the record will remain open and running in the background. This will slow your system and potentially lock others out of that particular record.

• AdHoc reporting is available via the Office of Sponsored Programs. If there is a report you need run, please contact OSP.

If you have any questions, would like additional training, or think you are missing something please call the Office of Sponsored Programs – 766-3131.
Accessing InfoEd

ON-CAMPUS Users:
Log into InfoEd
Production: https://infoed-prd.uwyo.edu
Dev (training): https://infoed-dev.uwyo.edu

OFF-CAMPUS Users: Must use VPN secure access using WyoSecure

When the screen refreshes, enter your UW Username and Password and click “Sign In”.

Welcome to the
University of Wyoming Secure Portal

Please sign in to begin your secure session.

Sign In
Enter the InfoEd production web address in the “Browse” window & click “Browse”:

You will see the InfoEd login screen (below). Type in your UW Username and Password to access InfoEd.
Proposal Tracking

Proposal Tracking (PT) contains the submitted budget/proposal to a sponsor, all project documents, and correspondence with both the sponsor and University personnel. PT houses Deliverables (reporting requirements from the sponsor), invoices, cash receipts and technical reports.

Click “Login” - Enter your User ID / password (user domain login), InfoEd main window opens:

1. Mouse over “Sponsored Projects” from the folder tree (left-hand side of window). An additional drop-down window will appear. Click “Locate Records” (A new window will open.)
2. From the “Available fields to search by”, click “Record Number”.

“Record Number” will now appear on the far right of the window under “Selected fields”.

You can have multiple selected fields to help narrow down your search if necessary.
3. By clicking “Locate My Records” this will show all results for you, the individual logged in, such as the primary PI or a Co-PI.

4. Mouse/hover over the proposal number you are looking for, a drop-down list will appear. Mouse over “Proposal Tracking” and then “View” to view the proposal information. (A new window will open). You are still in PT indicated by the yellow folders in the folder tree. In the upper right-hand corner a reddish-pink textbox states, “You have opened this proposal in view mode” if you see a green textbox that says “Edit mode” please call Sponsored Programs immediately.
a. “Attachments (#)” folder (from the folder tree). **PT is the only place attachments will be uploaded.**

   The following types of documents are viewable:
   
   i. Greensheet
   
   ii. Proposal
   
   iii. Award documents
   
   iv. Invoices, cash receipts, technical reports, etc.
   
   v. Any additional electronic files that have been attached by either the Research Office or Sponsored Programs. (NOTE: prior awards, with alpha-numeric budget IDs do not have all attachments in InfoEd.)

b. “Deliverables folder (from the folder tree) show all reports that are required by the sponsor, the date they are due and the ability to upload/complete the report submission for audit tracking. There is a checkbox, at the bottom of the screen for “No Deliverables Required”…should this sponsored project not require any type of deliverable, this will be checked.

c. “Communications” folder (from the folder tree) will house the Research Office award notice and any additional emails **sent through** the InfoEd PT module.
d. The **Sponsor** folder will provide information that used to be housed in the Awards Tracking module:

- **Project (# assigned by Sponsored Programs)** – used in POET
- **Organization (Department Name)** – used in POET
- **Salary allowed** (Yes/No – no will be blank)...if you are trying to load a budget for Payroll, and it isn’t valid, check to see if the this says yes or no. If there is no mention of salary or tuition, in the award budget, OSP will not check the box and it will not be loaded in HRMS.
- **Budget Journal Description**
- **Financing** (how OSP will bill/receive funding from the sponsor)
- **IC Rate/Base** (% of Indirect Cost to be assessed if applicable)
- **IC Base** (Modified Total Direct Cost (MTDC), Total Direct Cost (TDC), Lump, or NONE according to the awarded budget)
- **OSP Coordinator** (person you contact if you have question(s) about your sponsored project)
Award Tracking provides information regarding the actual budget, fund, org, project ID, and cost share if required. Here you can also see which OSP coordinator is assigned to the record/project you are looking at along with any additional personnel assigned to the project.

1. Mouse over “Award Tracking” from the folder tree (left-hand side of window). An additional drop-down window will appear. Click “Locate Records” (A new window will open.)

2. From the “Available fields to search by”, click “Record Number”.
“Record Number” will now appear on the far right of the window under “Selected fields”.

You can have multiple selected fields to help narrow down your search if necessary. Type in the project number and click “Search”.

3. By clicking “Locate My Records” this will show all result for you, the individual logged in, such as the primary PI or a Co-PI.
4. Mouse/hover over the award number you are looking for, a drop-down list will appear. Click on “Award Tracking” to view the award information. (A new window will open). You are in AT indicated by the blue folders in the folder tree.

NOTE: UW is not using the “Data Center” at this time.
1. **Summary** is just that, a summary of that Award record. The top portion provides:
   a. Award Number (UW budget ID)
   b. Award Received Date (date of award notice from sponsor)
   c. Start Date/End Date
   d. Sponsor
   e. Status (Awarded, pending setup / Awarded / Closed)
   f. CFDA
   g. ID No. (this comes from the sponsor when the PI creates a proposal in Proposal Development)
   h. Award Increments (reflects the various funding during the term of the award, i.e. increases/decreases)
   i. Proposal Information (is a link back to the PT record)
2. Award Increments/Versions
   a. Award Increment Detail (Award Date—for that increment, Award Number, Award Type, Start/End Date, Document Number—comes from sponsor)
   b. Award Versions (Shows original budget setup and any additional changes made along with the date the change was made. Click the “eyeglasses”, under “View” to see the detailed budget.)

The window will refresh with the budget detail page for that particular increment:

- **Budget Detail** (Object Code/Budget Category) comes from the award documents. If OSP does not have a detailed award budget it will be loaded as “Other Costs – B2000 and Indirect Cost – B8000” when applicable.
- **Project Cost** (total cost to complete the project – third column from the right)
- **Sponsor Cost** (shows a portion of the Sponsor’s Name – example above “National Ins”, any figures in the second column from the right, is what the sponsor is going to pay and in what areas if specified.)
- **Cost Share** (shows a portion of the Department’s Name – example above “School of Ph”, any figures in this column are what the department is responsible for (cost share) per the award document OR the proposal document.

- **Terms and Conditions** – if specified, in the award document, you can find what is required in this section. Sometimes there is a hyper-link that will take you to the specific Terms and Conditions.

- **Award Increment Version Status History** – OSP coordinators can also make comments in this section as to why the award increment was created.

3. **Related Proposals** – provides a link back to the proposal tracking module.

4. **Terms and Conditions** – same information provided on the Versions Detail page.

5. **Status History**

6. **Communications** – the OSP Award Notice, generated from InfoEd, is located in this folder.

7. **Personnel** – lists all personnel that should be associated with the project per the Greensheet. Assigned from the submitted proposal and OSP. The names are hyperlinked allowing you to click on the name and see their contact information.
8. **Snapshot** – a quick/condensed version of the AT record which also included any subprojects if applicable.