InfoEd Proposal Development Walkthrough: Developing Proposals for Internal Program Support

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infoEd
InfoEd International, Inc.

Table of Contents

System Requirements

The following items should be noted when using the InfoEd system:

- InfoEd supports both Macintosh and PC but has specific internet browser requirements as specified below.

- InfoEd requires an internet connection and supports the following internet browsers: Internet Explorer; Firefox; Netscape. Other browsers, such as Safari, are known to be unstable when running the InfoEd system. It is strongly recommended you use one of the supported browsers.

- All files uploaded to InfoEd must have page margins of exactly 8.5 X 11. If working with scanned documents, it may be necessary to manually adjust your page margins to meet these specifications. Documents that do not conform will generate an error message or otherwise fail to upload.

Accessing the System

InfoEd eRA Portal Streamlining Elec...

Navigate your browser to **www.infoed.uconn.edu** and proceed to log in. If you do not know your login information, contact the Office for Sponsored Programs (OSP) at 860-486-4175 or 860-486-3622

Login

| Home |
| » Login |
| SPIN |
| GENIUS |

Login

Username _____

Password _____   [Login]

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IMPORTANT: Before you begin, please be sure to read the guidelines for applying to UConn's internal funding program at **http://research.uconn.edu/ips/lrge_sml_grants.php** In addition, it is helpful to prepare the following information before creating a proposal in the InfoEd system. Each bullet item below should be prepared as a SEPARATE DOCUMENT (i.e. MS Word, etc.)

- Cover Letter (if resubmitting a Large Grant application)
- Proposal Abstract (i.e. brief summary of proposed work)
- Proposal Project Plan (i.e. detailed description of proposed work)
- Budget (be sure to include intramural and extramural support information; CV/bioksetches for PI and additional investigators)
- Other Miscellaneous Attachments as Desired

Creating a Proposal

InfoEd eRA Portal — Streamlining Electronic Research Administration

2a. To create a new proposal in the system, click the "Create Proposal" button.

Back Save Log Out Help New Portal

1. Click the "Proposals" tab on the blue panel to access the Proposal Browse/Create screen.

Personal
Messages
Profile
Calendar
Contacts
Find Funding
CV Database
Projects
» Proposals
    All Proposals
    Advanced Search
    Reports
    Help – PD
    Help – PT
Protocols
Help
Administration

Proposals   [Create Proposal] [Create in PT] [Reports]

Open By Institution Number [Go]   [   ]   **Advanced Search**

Status   Items   Open

All Proposals   9888

2b. To browse for a proposal you've already created, type its log number in the text field and click "Go".

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Creating a Proposal (Continued)

https://www.infoed.uconn.edu - Create New Proposal - Microsoft Internet Explorer

Marcus Santodonato- Office for Sponsored Programs
Show

Proposal
----TBD----

1. By default, the system will assign the logged in user as the PI for the proposal. If you are creating this proposal on behalf of someone else, click here to select the appropriate PI.

Cancel

New Proposal Questionnaire

Back

This proposal will be created with **Santodonato, Marcus** as the PI.   Change PI

| Step 1 | "New" or "Copy From Existing"? | Create a New Proposal |

Step 1 Continued....   I need to locate a funding Opportunity

I need to locate a funding Opportunity
I know this proposal is going to be submitted to Grants.Gov
Neither of the Above

Continue to Next Step

2. *It is important that you always select "Neither of the Above" as the answer to this question.

4. Click here if you need to go back to any previous step and change your information.

3. Click this button to proceed to each additional step and provide the information requested (see next pages for additional illustration).

Done

Internet

Creating a Proposal (Continued)

*IMPORTANT: You must always select "University of Connecticut Research Foundation (UCRF)" as the sponsor for the proposal.

Creating a Proposal (Continued)

1. **Click here when you have provided all necessary information.**

2. **Click here if you've made a mistake or need to change any information.**

Creating a Proposal (Continued)

http://infoedts02.osp.uconn.edu - Setup Questions - Microsoft Internet Explorer

Done Back Save Help Show

A pilot study to examine the relationship between early childhood intervention programs and academic achievement.

Marcus Santodonato- Office for Sponsored Programs (University of Connecticut Research Foundation (UCRF))

Proposal
PD08-0003

To log out of your proposal and return at a later time, click the "Done" icon

Setup Questions (Step 8)

Setup Questions   **Please answer all questions below and click SAVE.**

Each proposal is broken down into several sections based upon what the sponsor and your institution requires. Once each section **Completed** checkbox in the upper right corner of that section. When all sections have been completed, you will be able to produce

1. Write down the log number for your proposal. You will need it if you wish to browse for your proposal at a later time (as illustrated on page 5).

Submission Mechanism/Form Information

Proposal Sponsor is set to **University of Connecticut Research Foundation (UCRF)**. Click here t

Submission Mechanism/Screen Template **UConn Internal Funding Program Cover Sheet**

2. Answer all questions on this page. *Note that all questions might not be relevant to internal funding proposals.

Yes   No
○   ◉   Has your sponsor given a specific reference for this proposal?

Select Mechanism

[▼]

Mechanism Opt In/Out
○   ◉   Is this a US federal sponsored project?

Not relevant to internal funding proposals. Leave blank.

Deadline Information

Yes   No
◉   ○   Is there a Deadline for this Submission?

Deadline Type: [Electronic Receipt ▼]
Deadline Date: 01-Mar-2008
Deadline Time: 5:00:00 PM
Deadline TimeZone: [(GMT-5:00) Eastern Standard Time   ▼]

3. If any departments or centers other than the PI's primary are involved, add them to the appropriate locations.

General Proposal Properties

Yes No
◉   ○   Will you be including a **Cover Letter** in your proposal as an attachment?

○   ◉   Will your proposal include any **Subcontractors**?

○   ◉   Will you be working with other internal departments or divisions as **Subprojects**?

◉   ○   Will your proposal involve the use of **Human Subjects**?

◉   ○   Will your proposal involve the use of **Laboratory Animals**?

○   ◉   Are you a new investigator?

Associated Departments   Add
    Office for Sponsored Programs
PI Departments   Add
    Office for Sponsored Programs
Associated Centers/Programs   Add
    None Identified

Budget Setup Information

What kind of budgeting model would you like to use? [Budget by Total Project ▼]

Is this a flow through Project?   Yes ○ No ◉

Select the Program Type [Research   ▼]

Since you will be uploading your budget into the system, it doesn't matter how you respond to this question.

Done   Internet

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Cover Letter

**Cover Letter(Required For
...Resubmission Only) - Microsoft Internet Explorer**

A pilot study to examine the relationship between early childhood intervention programs and academic achievement

Marcus Santodonato- Office for Sponsored Research Foundation(UCRF))

Proposal
PD09-0107

Done Back Save Help Show

- Setup Questions
- » **Cover Letter(Required For ...Resubmission Only)**
- Abstract
- Project Plan
- Budget and Other Attachments
- Finalize: e-Coversheet & ...Submit for Review

Cover Letter

You have now created a proposal record in the system. The tab highlighted in white indicates which screen of the proposal you are viewing. You will need to click each tab accordingly as you progress through these instructions.

Completed ☐

You have indicated that a **Cover Letter** was going to be part of this proposal/application. Use this screen to upload an electronic version of the document that you want to use for this purpose. Clicking the ⏏ icon will allow you to select a file for this purpose. You will not be able to mark this section **"Completed"** without uploading a document. If you do not wish to include a **Cover Letter** please visit the Setup page to change your answer to the question.

Cover Letter Document

Upload

⏏

Upload Cover Letter

E:\PD Internal Funding Tes | Browse... | ⏏

All uploaded documents will be automatically converted

4. Check box when finished.

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1. If you have chosen to include a cover letter, the "Cover Letter" screen will appear as the first screen for the proposal. Click here to begin uploading your letter.

2. Click to locate the file on your computer.

3. Click to upload the file. *Note: All files uploaded throughout the system will automatically convert to Adobe .PDF format.

Internet

10

Abstract

Abstract - Microsoft Internet Explorer

Done Back Save Help Show

A pilot study to examine the relationship between early child[...] programs and academic achievement

Marcus Santodonato- Office for Sponsored Programs (Unive[...] Research Foundation(UCRF))

Proposal
PD09-0107

On this screen, you must upload a brief abstract describing the scope of the proposed work. *Note: The file should ONLY contain the abstract and not the entire project plan.

✔ Setup Questions

✔ Cover Letter(Required For ...Resubmission Only)

» **Abstract**

Project Plan

Budget and Other Attachments

Finalize: e-Coversheet & ...Submit for Review

Abstract

Upload "Project Summary" Documentation

E:\PD Internal Funding Test Docume | Browse... |

Completed ☐

3. Check box when finished.

1. Click to locate the file on your computer.

2. Click to upload the file.

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*Note: DO NOT include page numbers on any document you upload to the system. All documents will be automatically assembled and numbered for you during the "Finalize" stage.

Done

🔒 🌐 Internet

Project Plan

Project Plan - Microsoft Internet Explorer

Done Back Save Help Show

A pilot study to examine the relationship between early programs and academic achievement

Marcus Santodonato- Office for Sponsored Programs Research Foundation(UCRF))

Proposal
PD09-0107

On this screen, you must upload a file containing a comprehensive description of the project plan for the proposed work.

- Setup Questions
- Cover Letter(Required For ...Resubmission Only)
- Abstract
- **» Project Plan**
- Budget and Other Attachments
- Finalize: e-Coversheet & ...Submit for Review

Project Plan

Draft Version ▾   **Completed** ☐

Upload Project Narrative

E:\PD Internal Funding Tes   Browse...   ↥

3. Click to upload the file.

Name Project Plan for

All uploaded documents will be automatically converted to PDF.

1. Type a name for the file you are uploading

2. Click to locate the file on your computer.

4. Select whether the project plan is in "Draft" or "Final" form. *Note: You may begin the internal routing process (explained later) with a draft version and replace it with the final version as soon as it is complete. To replace the file with a new version, repeat steps 1-5.

5. Check box when finished.

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*Note: DO NOT include page numbers on any document you upload to the system. All documents will be automatically assembled and numbered for you during the "Finalize" stage.

Internet

Budget and Other Attachments

Budget and Other Attachments - Microsoft Internet Explorer

Done Back Save Help Show

A pilot study to examine the relationship between early childhood intervention programs and academic achievement

Marcus Santodonato- Office for Sponsored Programs (University of Connecticut Research Foundation(UCRF))

4. Check box when finished.

Proposal
PD09-0107

- ✔ Setup Questions
- ✔ Cover Letter(Required For ...Resubmission Only)
- ✔ Abstract
- ✔ Project Plan
- » **Budget and Other Attachments**
- Finalize: e-Coversheet & ...Submit for Review

Other Attachments

Completed ☐

Upload Other Attachments *(optional)*

E:\PD Internal Funding Tes   Browse...

3. Click to upload the file.

Name Budget

All uploaded documents will be automatically conve

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*You may upload as many files to this screen wish. At a minimum, the information you provide should include: (1) a detailed budget with line item justifications (2) the % effort for all personnel, and (3) CV/Biosketches for all Key Personnel. You should also provide any research compliance approval letters, appendices or other miscellaneous document in this area. *Note: You may upload all information as one comprehensive file or split it into separate files according to your preference.*

1. Type a name for the file you are uploading

2. Click to locate the file on your computer.

Note: DO NOT include page numbers on any document you upload to the system. All documents will be automatically assembled and numbered for you during the "Finalize" stage.

Internet

Assembling the Proposal Application File

Done Back Save Help Show

A pilot study to examine the relationship between early childhood intervention programs and academic achievement

Marcus Santodonato- Office for Sponsored Programs (University of Connecticut Research Foundation(UCRF))

Proposal
PD09-0107

- ✔ Setup Questions
- ✔ Cover Letter(Required For ...Resubmission Only)
- ✔ Abstract
- ✔ Project Plan
- ✔ Budget and Other Attachments
- »✔ Finalize: e-Coversheet & ...Submit for Review

Finalize

Build PDF / Form Pages

Assemble Application

Document	Page Count	Sequence	Page Numbers	Edit / Build
Cover Letter(Required For ...Resubmission Only)	1	1	1	
Abstract	1	2	2	
Project Plan	5	3	3	
Budget and Other Attachments	1	4	8	

Final Proposal (Built:03-Oct-2008 10:19:51 AM)

This section allows you to ... components should have been generated ... and converted (if necessary) into ...

The first step is to indicat... to be assembled in. A default ord... quence if you like.

You may also indicate which pages you would like numbers to appear on the bottom of, and what the starting point is for those numbers. If you do not want sections to be numbered, leave the box for that section blank. Page numbers are sequential within a given section.

The **"Build"** button will construct one composite document based upon the preferences ... nt carefully. This is your final proposal. If there are ... ct them at this point. Sequencing or page ... om this screen. Other problems may require you to ... ke changes. It will be necessary to "un-check" the ... nges. You may build the proposal as many times ... l be saved.

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1. Click here if your screen did not automatically navigate to the "Assemble Application" section of the "Finalize" screen.

4. Click here to view a copy of your final proposal application package.

2. Type in the sequence you wish each section of your proposal to appear, as well as the appropriate page number that starts each section. Make sure to click the "Save" icon 💾 afterwards. *Tip: To calculate the correct page number for the start of each section, add the "Page Number" column for the previous section to the "Page Count" column for the previous section.

3. Click "Build" to assemble each section into one inclusive file.

IMPORTANT: If you make any changes to any screen in the proposal after completing this screen, you will need to repeat steps 1-4 above.

Finalize – Preparing the e-Cover Sheet

**Finalize: e-Coversheet &
...Submit for Review - Microsoft Internet Explorer**

Done Back Save Help Show

A pilot study to examine the relationship between early childhood intervention programs and academic achievement

Marcus Santodonato- Office for Sponsored Programs (University of Connecticut Research Foundation(UCRF))

Proposal
PD09-0107

- Setup Questions
- Cover Letter(Required For ...Resubmission Only)
- Abstract
- Project Plan
- Budget and Other Attachments
- » **Finalize: e-Coversheet & ...Submit for Review**

Finalize

Build PDF / Form Pages

Assemble Application

Submit for Internal Review

This row contains the proposal document you built on the previous screen is labeled as "Assembled Doc". You can view it by clicking the View icon 👓.

Once your proposal has been com... ...play in two modes: Un-submitted and Submitted.

The screen is in **Un-submitted** mode when your proposal has not yet been routed. You can determine this by visually identifying a "thumbs up" on the screen. If it is there, then the proposal has not yet been submitted.

The screen is in **Submitted** mode when your proposal has been submitted and you can see the approval path it is on. Your Administrators have configured the approval path that they feel is appropriate for your proposal. If you have any questions regarding this process, please contact them.

Current Proposal Status: **All Proposals**

Components for **Initial Application**   Submit 👍

Form Name	Open	Status	Action	Completed Form	Remove
Assembled Doc	N/A	Completed	⬆	👓	↪

Add Institution Forms/Supporting Documents

1. In addition to your proposal document, you will need to complete an electronic Proposal Cover Sheet. Click this link to get started.

https://www.infoed.uconn.edu/Protocol/popUpGetAddComponent.asp?ObjectID=584B50C33D179622E040007 - Microsoft In...

Upload   Upload   Close
Upload new document

Name [   ]

Location [   ] Browse...

Category [Agreement ▾]

Folder [ROOT] ▾

Add Initial Application Components   Add

Form Name	Type	Add
Internal Funding Program Cover Sheet	Conditional Use	☐

2. Click the check box for the "Internal Funding Program Cover Sheet" and then click the "Add" button.

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Finalize – Preparing the e-Cover Sheet (Continued)

https://www.infoed.uconn.edu/EForm/EFormGetEditFormData.asp?System=PT&SystemEFormId=584B879CF89 - Microsoft Internet Explorer

Updated By: **Marcus Santodonato** @ 10/2/2008 3:55:42 PM

MENU

Save

Check In/Out

Quest Hist

Form Hist

Print

PAGES

Internal Research Funding Cover Sheet   ☐ Complete

Page 1

General Information

*1. Project Title

A pilot study to examine the relationship between early childhood intervention programs and academic achievement

Choose a title that is descriptive and specific, rather than general. If the request is for a sabbatical leave project, note (sabbatical) in the title.

2. Requested Funding Period: FROM/TO   *

-Jul-2009   30-Jun-2010

The maximum requested period is one year. For large grants, the "start date" should correspond with the semi-annual competition timetables, January 1 for the October deadline, or June 1 for the February deadline.

The maximum amount for a small grant request is $1,500. Please select whether this is a large or small grant proposal

*UCRF Grant Type [Large Grant ▾]

*4. Requested Total Amount [26,808.00]

*5. Will the PI's academic department administer and oversee the grant account?

Yes ☑ No ☐

If not, please select the department that will be overseeing the grant

🖉 ↪

Note: All departments are listed under the letter "D" and begin with "Dept"

*6. Sabbaticals (For Large Grants Only). Is this a sabbatical leave support request?

Yes ☐ No ☑

7. REVIEW PANEL ASSIGNMENT

Please review the application form instructions (http://www.rac.uconn.edu/largeandsmall.html) before answering this question. The council assigns the proposal to one of five standing review panels representing each of five research areas (life science, physical science, engineering, social science, humanities and fine arts). Some proposals may fall into two or more research areas. Indicate below the research areas covered by your proposal based on your based on the focus of the RESEARCH AREA and not the HOME DEPARTMENT. PLEASE CHECK ALL THAT APPLY

Engineering ☐   Social Sciences ☑   Humanities and Fine Arts ☐   Life Sciences ☐   Physical Sciences ☐

8. If you are an assistant professor and within 3 years of your appointment, please indicate your start date and the amount of your start up funds package (if applicable).

Hire Date [   ]   Amount of Start [0   ]

Done   🌐 Internet

1. Click the "Menu" button to access the menu bar. You will need to click the "Save" Icon 💾 after answering the questions on this screen. Interaction with the other icons is not necessary.

2. If you experience problems entering data into this form, make sure the "Lock" Icon 🔒 is unlocked and that you are using an internet browser that InfoEd supports (See system requirements page)

3. Answer all questions on this screen.

4. Check box when finished (give system a moment to refresh) and then close the window to return to the main proposal window.

**Finalize: e-Coversheet &
...Submit for Review - Microsoft Internet Explorer**

Done Back Save Help Show

A pilot study to examine the relationship between early childhood intervention programs and academic achievement

Marcus Santodonato- Office for Sponsored Programs (University of Connecticut Research Foundation(UCRF))

Proposal
PD09-0107

- Setup Questions
- Cover Letter(Required For ...Resubmission Only)
- Abstract
- Project Plan
- Budget and Other Attachments
- » **Finalize: e-Coversheet & ...Submit for Review**

Finalize

Build PDF / Form Pages

Assemble Application

Submit for Internal Review

1. Click here to begin the submission process.

Once your proposal has been completed, it can be electronically routed internally for necessary approvals. This page will display in two modes: Unsubmitted and Submitted.

The screen is in **Un-submitted** mode when your proposal has not yet been routed. You can determine this by visually ide... then the proposal has not yet been submitted.

The screen is in **Submitted** mode when your proposal has been submitted and you can see the approval path it is on. Yo... path that they feel is appropriate for your proposal. If you have any questions regarding this process, please contact them.

2. Click here to submit the proposal for internal approval (see next page for more details).

Current Proposal Status: **All Proposals**

Components for **Initial Application**   Submit 👍

Form Name	Open	Status	Action	Completed Form	Remove
Internal Funding Program Cover Sheet	📝	Completed	N/A	👓	➤
Assembled Doc	N/A	Completed	📤	👓	➤

Add Institution Forms/Supporting Documents

Tip: If the e-coversheet still displays a status of "incomplete" even after you have completed it, refresh your internet browser by clicking the tab for the screen you are currently viewing. Then, proceed with the submission.

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Done   🔒 🌐 Internet

You must manually select all individuals who are required by institutional policy to approve the proposal prior to submission to the VPRGE Office (Contact VPRGE for more information on this policy). The routing path from that point forward will be automatically configured for you.

1. Click this link to add the first person that the proposal needs to be submitted to (i.e. a co-investigator, your department head, etc.). *Note: If you are not the PI, you should always add the PI as the first person.*

5. Click "Submit when finished."

3. If you make a mistake at any time, click "Refresh Route".

2. Select the appropriate individual from the list and indicate whether you wish to require his/her approval or just notify the individual. Then, click the "Select" button.

4. To add the remaining individuals, click the "Insert" icon for the person you wish the next individual to appear *AFTER*.

**Finalize: e-Coversheet &
...Submit for Review - Microsoft Internet Explorer**

Done Back Save Help Show

A pilot study to examine the relationship between early childhood intervention programs and academic achievement

Marcus Santodonato- Office for Sponsored Programs (University of Connecticut Research Foundation(UCRF))

Proposal
PD09-0107

- ✔ Setup Questions
- ✔ Cover Letter(Required For ...Resubmission Only)
- ✔ Abstract
- ✔ Project Plan
- ✔ Budget and Other Attachments
- »✔ Finalize: e-Coversheet & ...Submit for Review

Finalize

> *Once the proposal has been submitted for internal approval, each reviewer will receive an e-mail prompting him/her to log into the system and approve the proposal. *IMPORTANT You can monitor the proposal's progression through the route using the "Routing Progress" table below and should follow up with any unresponsive parties as necessary.*

Once your proposal has been completed, it can be electronically routed internally for necessary approvals. This page will display in two modes: Un-submitted and Submitted.

The screen is in **Un-submitted** mode when your proposal has not yet been routed. You can determine this by visually identifying a "thumbs up" on the screen. If it is there, then the proposal has not yet been submitted.

The screen is in **Submitted** mode when your proposal has been submitted and you can see the approval path it is on. Your Administrators have configured the approval path that they feel is appropriate for your proposal. If you have any questions regarding this process, please contact them.

Current Proposal Status: **All Proposals**

Components for **Initial Application**

Form Name	Open	Status	Action	Completed Form	Remove
Internal Funding Program Cover Sheet	📝	Completed	N/A	👓	↪
Assembled Doc	N/A	Completed	⬆	👓	↪

[Add Institution Forms/Supporting Documents]

Routing Progress

PD09-0107 - Marcus Santodonato "A pilot study to examine the relationship between early childhood intervention program achievement"

Step Number/Name	Who	Notified	Completed
Inserted Step	Marcus Santodonato	03-Oct-2008 10:00:49 AM	03-Oct-2008 10:05:30
Inserted Step	Test Co-Investigator	03-Oct-2008 10:05:30 AM	
Inserted Step	Test PI Department Head		

> *Notice that the co-investigator was notified but has not yet recorded his/her approval. The proposal WILL NOT move on to the next step until this is complete.*

> **IMPORTANT: MAKING PROPOSAL CORRECTIONS AFTER SUBMITTING - You DO NOT need to re-submit your proposal if you need to make a change prior to the deadline after it has been submitted. However, you must notify Larisa Hull Zagorski (Larisa.hull@uconn.edu 860-486-6378) and any relevant reviewers of the change to ensure the correct version is forwarded to the review panel. Also, be sure you have re-built the final proposal file after making your changes as illustrated on page 14.*