

## GETTING STARTED: INFOED PROPOSAL SETUP

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This job aid prepares Research Administrators to create a proposal record in InfoEd. A proposal should *always* be setup in InfoEd even if the proposal does not end up being submitted. Sponsored Research uses this basic information to track upcoming proposals based on deadlines entered in the system and balance workload appropriately among staff.

Start by gathering the information below, then answer the questions on the Setup tab in InfoEd, especially the deadline information.

If further help or step-by-step instruction is needed, refer to the [New Proposal Questionnaire and Setup Questions Training Guide](#) found under [InfoEd Proposal Development Curriculum](#) in myHR Learn.

### GETTING STARTED CHECKLIST

You will need the following information to complete the Set-Up Questions tab in InfoEd.

1. PI Name and Department
2. Proposal Type (*see key below*)
3. Sponsor
4. Solicitation (*if applicable*)
5. Proposal Title
6. Project Start and End Dates

### PROPOSAL TYPE KEY

Proposal Type	Description
New	A proposal with a unique workscope and budget that has not been submitted to the sponsor previously
Preliminary Proposal	A preliminary proposal which is sometimes required to be submitted for specific programs/sponsors and typically outlines the overall project, includes minimal (if any) budget information, and requires institutional endorsement
Competitive Renewal	A proposal to continue support of a project beyond the initial commitment made when the award was issued. A renewal generally requires submission of a new proposal to the sponsor and usually requires a competitive review.
Supplemental Request	A request for an increase in the amount of funding and possibly an extension of time for an existing project.
Continuation	Request for continued support from a sponsor for a previously awarded project that is currently under way. Such a request is generally contingent on the investigator making satisfactory progress and the sponsor having funds available to meet initial estimate of outyear funding.
Revised	The Revised proposal type is used when submitting a proposal to modify the existing award by increasing or decreasing funds or duration of the award.
Non-Funded Negotiations	A proposal that fits the category of a Material Transfer Agreement (MTA) or Confidential Disclosure Agreement (CDA) and will not result in funding.
Resubmission	Resubmission of a proposal that has undergone revision in response to comments from the sponsor and will undergo competitive review or be reconsidered for funding.

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### INFOED PROPOSAL SETUP FAQ'S

If any information needs to be updated after the initial creation, simply uncheck the Complete Box on the Setup Questions tab in InfoEd and make the necessary changes. In addition, refer to the FAQ's below for how to update some specific items.

#### How can I change the PI after I create an InfoEd Record?

On the Personnel page, add the new person by searching for them in the personnel list. You can do this with any role, as long as you select **key**. Once the individual is added, use the radio button to switch the PI designation to the new person. Then delete the former PI or update their role to the correct value.

#### How can I change the proposal type after I create an InfoEd Record?

Uncheck the Complete Box on the Setup Questions tab, then click on the sponsor list hyperlink to change the sponsor. This will create a pop-up that also has an option to change proposal type.

#### How can I change the budget periods/dates after I create an InfoEd Record?

This is achieved by updating the number of periods or dates of periods in the budget. Once the budget is open, select the Setup Tab. Controls for dates and periods are located there. You will then need to complete the budget tab for the updates to reflect across the proposal (such as on the Proposal Routing Form or SF424).

#### How can I change the proposal title after I create an InfoEd Record?

If the proposal is system-to-system (s2s) and has an SF424 page, the title can be changed there. If not, it can be changed on the Proposal Routing Form. Add the Proposal Routing form to the Internal Documents tab. The title will change once the form is completed.

If you are working on a non-funded negotiation (CDA, MTA, DUA) change the title on the Generic Face Page tab.

#### What if my proposal deadline changes?

Uncheck the Complete Box on the Setup Questions tab and update the deadline field with the new information. Then complete the tab again. This will automatically update all of Sponsored Research's tracking mechanisms for submission monitoring.

#### What do I do if my proposal won't be submitted?

Contact Sponsored Research Business Systems & Operations Team with the pertinent information. SR will update your proposal record to indicate it is not moving forward. Email the BSO Team at [osr-info@northwestern.edu](mailto:osr-info@northwestern.edu).

#### Have a questions that wasn't answered above?

Email the Sponsored Research Business Systems & Operations Team at [osr-info@northwestern.edu](mailto:osr-info@northwestern.edu).