

Proposal Screens – Attachments & Routing

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General Notes

This document is intended to describe the steps in uploading attachments and submitting the proposal to the endorsement route. Capitalized words indicate an object in InfoEd. Italicized words indicate a field or parameter in that object or a reference to another document. Bold is used for emphasis in lists.

Common Objects or Terms in InfoEd

User: A person who can log in and use InfoEd

Portal: The landing page that is first seen after login, a.k.a. the Home page

Record: A generic term for an object in the system such as Proposal or COI Disclosure

S2S: An abbreviation for system-to-system submissions when a proposal can be sent directly from InfoEd to the sponsor

Widget: A generic term for the white text boxes on the portal screen (a wide variety of widgets are available in InfoEd with additional widgets developed as needed)

Attachments & Routing Menu Item

The Attachments and Routing Menu Item handles two functions – collecting additional supporting documentation and submitting the proposal for endorsement by researchers, chairs, deans, and other required signatures.

Attachments & Routing

Completed

Current Proposal Status: In Development

Components for Initial Application

Pre-Review Route: Ext. Funding Endorsement Route

Current Submission

FORM/DOCUMENT NAME	VIEW	STATUS	UPLOAD	REMOVE
GrantsGovInstructions		Completed		
Proposal Endorsement Form		Completed		Mandatory

[Add Institution Forms/Supporting Documents](#)

Note that the Proposal Intake/Endorsement eForm is included automatically in the list of attachments.

To Upload Additional Documents

It may be necessary to include additional documents with the Proposal that are not collected in the main proposal screens. Most often this happens when using non-S2S opportunities. Research plans, project narratives, or abstracts and scope of work agreements are examples of documents that may need to be uploaded here.

1. Click the “Add Institute Forms/Supporting Documents” link below the list of existing attachments. This will pop up a new window for collecting the documents.

Upload

Upload new document

Name

Location No file chosen

Category

Folder

Add Initial Application Components

Form Name	Type	Add
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2. Click the “Choose File” button and use the file explorer to select the desired file from your local machine or networked drives.
3. The *Name* field will populate based on the name of the document, but this can be changed here if necessary.
4. Choose the category for the type of file being added.
 - Proposal Documents
 - Notice of Award
 - Award Documents
 - Contract
 - Other
5. Select the folder to which to add the file. The default value is “[ROOT]” and is most often the only choice unless a folder structure has been established on the administrative side.
6. Click the “Upload” button.
7. Select whether to upload as a new document or to overwrite an existing document.
8. Click the “Close” button to complete the upload.

To Add Additional eForms

This functionality is not yet necessary or implemented.

To Submit the Proposal to Endorsement

Once the Setup Questions, Intake/Endorsement Form, Budget, and Personnel are complete, the Proposal is ready to be submitted for endorsement. The Endorsement process will collect signature approvals from all Key Personnel as well as the Chair and Dean of all Key Personnel's academic departments and colleges. While the Proposal is being endorsed, no changes can be made to the proposal.

1. Select the correct Pre-Review Route from the drop-down above the Form/Document grid list. Currently there is only one to choose, so it is the default value.

Attachments & Routing

Completed

Current Proposal Status: **Under Development (Assigned)**

Components for **Initial Application**

Pre-Review Route:

Current Submission

FORM/DOCUMENT NAME	VIEW	STATUS	UPLOAD	REMOVE
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2. Click the "Submit" button.
3. **If you are the PI of the Proposal**, a new certification window will pop up with the PI attestation statement in it. Read the statement and then select the "Accepted" radio button. You may need to adjust the size of the window to see all the text and the "Accepted" radio button.

Certification Close

I/We certify by signing below that:

- I/We have read and agree to abide by current University policies on conflicts of interest (3364-70-01), patents (3364-70-04), biohazardous materials (3364-70-06), and the use of human subjects (3364-70-05)/vertebrate animals (3364-70-10) in research, cost-sharing, and other University research policies as appropriate. I/We certify that the required actions regarding compliance with these policies have been taken.
- I/We have read and agree to abide by the University Policy on Integrity in Research and Scholarship and Procedures for Investigating Allegations of Misconduct in Research and Scholarship (3364-70-21).
- I/We will refrain from knowingly conducting activities that may constitute or result in the infringement of any patent, copyright, or other legal right during the project.
- I/We agree to provide a complete, accurate and truthful disclosure for this project as required by current UToledo policy and/or other regulations. I/We agree to disclose promptly to the Research and Sponsored Programs Office (i) any significant financial interest, as defined in chapter 510 of the National Science Foundation Grant Policy Manual, that would reasonably appear to be affected by the sponsored research and/or (ii) any significant financial interest in an entity whose financial interest would reasonably appear to be affected by the sponsored research.
- I/We agree to disclose promptly to the Research and Sponsored Programs Office and my/our immediate manager, department head, or chair any existing or new situations in which there is a divergence between my/our private interests and my/our professional obligations to UToledo or its students.
- I/ We acknowledge Article 6.0 of the Collective Bargaining Agreement, The University of Toledo Conflict of Interest patents (3364-70-04) and verify that the proposed project is in accordance with the applicable provisions of Chapter 102 of the Ohio Revised Code (Public Officers-Ethics), §2921.42 and §2921.43 of the Ohio Revised Code (Offenses Against Justice and Public Administration) and all other local, state, and federal laws.
- The statements contained herein are accurate, complete, and truthful to the best of my/our knowledge and belief.
- I/We certify that all proposed experiments, procedures, etc. involving human/animal subjects, recombinant DNA, or biohazards are contained in the regulatory protocols listed above OR that NO Regulatory Protocol is required. I/we will not seek a spending account until protocol approvals are secured. I/we acknowledge responsibility for acquiring and maintaining required regulatory compliance oversight for all aspects of the proposed work.

Accepted Declined

4. Click the "Continue" button.
5. The signature routing path will be calculated and presented in a pop-up window. You may need to adjust the size of this window to see all the steps and the "Submit" button.

Proposal **P-600312** - Demo PI "A study of groundwater supplies near Toledo OH" (In Development)

Refresh Route

Route Path - **Ext. Funding Endorsement Route** Add New Person to Review Path Submit

Step 1	Inform PI - Submission Receipt	Demo PI	Information Only	Insert After
Step 2	GC Endorsement Readiness Check	Jamie Vannatta	Approval Required	Insert After
Step 3	Inform PI - Passed GC Check	Demo PI	Information Only	Insert After
Step 6	Inform PI - Key Personnel Done	Demo PI	Information Only	Insert After
Step 7	Chair/Dean Endorsements	MC Test Chair	Approval Required	Insert After
	Chair/Dean Endorsements	MC Test Dean	Approval Required	Insert After
Step 8	Inform PI - Leadership Done	Demo PI	Information Only	Insert After
Step 10	Post Endorsement Review by GC	Jamie Vannatta	Approval Required	Insert After
Step 11	Notify PI Route Complete	Demo PI	Information Only	Insert After

No comments have been recorded yet

- Review the people in the route. Additional people can be added to the route if necessary, but the people calculated by the system cannot be removed from the route. See the next section in this document for how to add additional endorsers to the route. **Note: if the wrong name is listed for Chair and/or Dean or no name is listed for either the Chair or Dean, please email infoed@utoledo.edu with the relevant information so this can be corrected.**
- Once confirmed that all endorsers are listed, click the "Submit" button.

To add an additional endorsement signature request

Endorsement is collected in "Steps." Adding another endorser will add another step to the route.

- Determine where in the sequence the new endorser needs to be added and click "Insert After" at that point in the route. A new window will pop up.
- In the "Insert After" pop-up window, begin typing the name of the new endorser and select from the filtered list.

Add step Add Cancel

Informational Only
 Approval Required

- Select whether you want the person to have to approve the proposal (default) or just be informed of the proposal at that step.
- If Approval is required, select the appropriate attestation text from the drop down.
 - Chair Attestation
 - Dean Attestation
 - Key Person Attestation
 - PI Attestation

If the added endorser does not fit one of the attestation texts, such as a budget coordinator or departmental administrator, leave the drop-down field blank.

- Click the "Add" button in the upper right corner.
- Confirm that the additional endorser has been added appropriately and click "Submit" in the upper right corner to send the proposal into route.