InfoEd Version 15

Highlights of Changes

Last Updated: 11/15/17
InfoEd will undergo a major upgrade the weekend of Saturday 11/18 and Sunday 11/19. InfoEd will be shut down beginning Friday 11/17 at 5 pm through the weekend. While we hope the system would be up on Monday, 11/20, it is unlikely to be up until Tuesday, 11/21 the earliest.
InfoEd Version 15 – Highlights of Changes

- Set Up Tab: Select a Sponsor (i.e., Funding Agency) Using Progressive Text
- Personnel Tab: Default is on Key Personnel
- Budget Tab: Option to Enter Entire Budget onto Main Budget Tab or Into Individual Tabs by Period; Other Changes
- Subawards are Added Differently
- Eform is a Stand Alone Tab

See following slides for details.
General Change – Looking for Help?

Need assistance and want to open up a Ticket with Research IT from your proposal? Click on the Support icon. Both icon styles appear on different tabs in InfoEd v. 15.
Tabs That Remain the Same or Little Change

- Brief Lay Summary
- Research or Program Plan and Progress Report Tabs
- Classification Codes
- Finalize – Approval is the same.

There is a new validation feature for S2S applications. Additional instructions are to follow.
Tabs That Are Different

- Set Up
- Personnel
- Budget
- Internal Documents – Eform Moved to a Standalone Tab
For internally funded projects, known as an “Icahn School of Medicine” projects, start typing “Icahn…,” in the box, the option “Icahn School of Medicine” appears below, click on it, and then press the “Continue” button.
Personnel Tab – Replacement of “Personnel Wizard” with Progressive Typing Box

OLD V. 13 VERSION

New V. 15 VERSION

Begin typing in box to select Personnel Name.
Personnel Tab – Default Set to Key Personnel

When adding personnel, change the default from key to another option when appropriate. Always click on the “Save” button to save changes.
Personnel Tab – “Create Profile” is Only for New TBNs and TBDs

Only use this Create Profile feature to create new “to be named” positions. Begin typing to see if your “TBN” or “TBD” is already there. To add any new TBN or TBD positions or to add new personnel, please follow the standard process of opening up an InfoEd Ticket > Help Topic: InfoEd / New Personnel Request.

Policy Reminder!
For applications that do not require a budget tab, you can omit non-key personnel, TBN positions and consultants.
Personnel Tab – Subaward Personnel are Added Differently

**OLD V. 13 VERSION**

<table>
<thead>
<tr>
<th>Name / Role</th>
<th>% Effort</th>
<th>Order</th>
<th>Organization / Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allison Guttik (P1)</td>
<td>0.00</td>
<td>1</td>
<td>Yale School of Medicine at Mount Sinai/Grants and Contracts Office</td>
</tr>
</tbody>
</table>

**NEW V. 15 VERSION**

![Personnel Tab](image)

More information about these changes are on the following slides.
Steps to Add A Subaward with Personnel
1. Click on Proposal Element icon.
2. Click on Add Subaward Link.
3. Type in Name of Subaward.
4. Select Subaward Name.
5. Click on Select Subaward.
6. Type in Subaward PI first.
7. Select Subaward PI.
8. Click Continue.
Personnel Tab – Subaward Personnel are Added Differently (continued)

Now that you’ve added the subaward institution and the subaward PI …

9. You’ll see the subaward added in the “Budget Structure” section.
10. Add staff to the subaward “SubAward: SUB…” It is now set as the default. Make sure to select it from the drop down if you are adding subaward personnel at a later time.
11. Choose appropriate “Personnel Type” from drop down menu, begin typing name in the “Name” field and select “Role.”
12. Choose appropriate role and personnel type.
13. Click on “Save.”

Policy Reminder!
Do Not Add a Subaward on a Subaward.
Reminder - When adding personnel, change the default from key to another option when appropriate. Always click on the “Save” button to save changes.

Reminder - Only use this Create Profile feature to create new “to be named” positions. It is rare that you will use this feature on subawards. To add any new personnel, please follow the standard process of opening up an InfoEd Ticket > Help Topic: InfoEd / New Personnel Request.

Procedure Reminder! Entering all subaward personnel positions may not be necessary. Please review the data entry section in GCO’s SOP on Subawards.
Budget Tab – Initial Screen

OLD V. 13 VERSION

Note: As in the current version, a modular budget tab appears only when a user chooses the modular budget option in the set up tab.

NEW V. 15 VERSION

See next slide for info on new capabilities.
Budget Tab

New Features: Options to enter budget information on this initial screen and on period tabs. Both of these features are new.

Procedure Reminder!
Entering all budget details may not be necessary. Please review the budget section in GCO’s Application Checklist Instructions.
Steps to Adding Personnel Costs

1. Click on Detail.
3. Add Calendar Months.
4. Another option is to change to Percent Effort in the drop down menu to calculate.
5. Select Mount Sinai’s Fringe Benefit rate from the drop down arrow.
6. Another option if the funding agency requires a fringe amount that is less than Mount Sinai’s, data enter the amount instead.
7. Click on Save or Save and Close.

Note:
Even though the user entered info in Period 1, the data is populated for all the years.

Not needed? Simply delete or change it.
Steps to Adding Bulk Entry Non Personnel Costs

1. Click on Add Bulk Entry.
2. Option to add a description (e.g., lab supplies).
3. Add the amount.
4. Select Budget Category from drop down.
5. Repeat 2-4 in other rows to add more costs.
6. Click on Add to Save.

New Feature: Option of entering many costs at once in “Add Bulk Entry.”
Budget Tab > Non-Personnel Costs > Add Item

Adding Costs Individually – Not Bulk

OLD V. 13 VERSION

NEW V. 15 VERSION

See following slide for data entry instructions.
Budget Tab > Initial Screen > Non-Personnel Costs > Add Item

Adding Costs Individually – Not Bulk

Steps to Add(ing) Items in Non Personnel Costs

1. Select a Budget Category from drop down.
2. Click on Add Item.
3. Add an Amount.
4. Click on Save or Save and Close.

Note:
When a user enters $ amount in Period 1 only, the data is populated for all the years.

Not needed? Simply delete or change it.
Modular Budget – Default Set to 10 Modules, 10 x 25,000 = $250,000

Please change the default “Modules” setting to the appropriate amounts.
F&A Tab – Adding Facilities and Administrative Fees (F&A) via Manual Entry

OLD V. 13 VERSION

User enters a F&A $ amount.

NEW V. 15 VERSION

User has the option of entering a F&A rate (e.g., 10%, 15% etc.) or an amount.
F&A Tab – Adding F&A via Manual Entry

Steps to Adding F&A via Manual Entry
1. Click on Manual F&A.
2. To calculate F&A based on a rate, add the Rate and the Base. The F&A Amount will calculate based on this info.
3. Another option is add the Amount instead (i.e., w/o rate and base).
4. Type in Indirect Cost Type. “General” is a fine option for non-federal research grants.
5. Click on Save.
6. Data enter future years.

Note:
As is the current process, continue to use the already set (i.e., default) F&A rate, rather than manual entry, for on campus federal research grants.

Completed
Initial Budget Tab > Subawards

Below is a snapshot of the Initial Budget Screen. Since the user already added a subaward in the Personnel tab, you’ll see the subaward included budget tab below.

Click on Detail to add the subaward’s budget details.
Budget Tab > Subawards Tab – Same Features

The subaward budget tab has the same budget features (e.g., Personnel, Non-Personnel, F&A) that has been presented.

Procedure Reminder! Entering all subaward budget details may not be necessary. Please review the data entry section in GCO’s SOP on Subawards.
Eform – Standalone Tab – No Longer Part of Internal Documents

OLD V. 13 VERSION

The eForm is no longer part of the Internal Documents tab. As is the current process, users complete the “New/Competitive…” or the “Non-Compete..” eForm depending on your project type.
Training

We are working on additional options.

The weekly InfoEd Class required for new InfoEd users will be presented on InfoEd version 15. Any current users are welcome to attend the weekly class to view the demos.

InfoEd Class Schedule
InfoEd Training Policy
End