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What is InfoEd?

InfoEd is a comprehensive system for tracking and managing grant applications, with facilities for compliance, finance and reporting. InfoEd is a U.S. product which has undergone some modifications for use at UNSW.

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Can I arrange training on InfoEd?

InfoEd training is self paced.
Please refer to the training materials on the
GMO website:
http://www.gmo.unsw.edu.au/InfoEd/infoed_index.html

What is Proposal Tracking (PT)?

Proposal Tracking (PT) is the InfoEd component used by Grants Management Office to record and track research grants.



**What is the URL for InfoEd at
UNSW?**

<http://www.myresearch.unsw.edu.au>



What is my username and password?

Username and passwords will be provided by Grants Management Office.
Application forms can be found on the GMO website:

http://www.gmo.unsw.edu.au/InfoEd/infoed_index.html

I've forgotten my username and password. Who should I contact to reset?

Contact the I.T. Service Desk on x51333
Or email servicedesk@unsw.edu.au

I can't login to InfoEd despite using the correct username and password?

Usernames and passwords are case sensitive, check the Caps Lock and Num Lock on your keyboard.
If issues persist, please contact the I.T. Service Desk.

What access level do I have in InfoEd?

Researchers have access to see their own proposals.
All other personnel are granted access depending on the authorisation given on the Application for Access form.

**Will I be able to find and/or
view one of my
colleagues' proposals?**

No.

Unless you are a named investigator or have the
authorised access level.



Can I obtain a higher access level?

Yes.

However authorisation is required from your Associate Dean of Research.

Do I need to complete the Application for Access Form?

Yes.

Anyone wishing to access InfoEd must complete an application form. Forms can be found on the GMO website:

http://www.gmo.unsw.edu.au/InfoEd/infoed_index.html



How do I exit the proposal I'm viewing?

Click Done on the toolbar.

Where is the back button in InfoEd?

There is no back button.
Use the Side Bar to navigate between folders.
Some folders/screens will open in a new window therefore switching between windows is possible.



How do I move to a different screen within a proposal?

Click the required folder in the side bar.

What is the Side Bar?

This is the navigation tool seen as expanding/
collapsing folders on the left of the window.

How do I know which screen I am viewing?

The folder name in the Side Bar will be **bold**.

How do I find my proposals in InfoEd?

From the InfoEd main screen click:

- **My Proposals > Show/List:** this will list all proposals for which you are the primary CI.
- **My Proposals > Search For...** (6 search fields display – leave them blank).

Click **Locate:** all records for which you are the Primary CI and all records on which you are a named investigator display.

What does the Show/List function do?

Show/List displays a list of all proposals for which you are the **primary CI**.

What does the Search For function do?

Search For allows you to search for specific criteria entered in to the search fields.

Note: You will only be able to see proposals you have access to view, regardless of the search criteria you enter.

Can I see my previous successful grants and/or unsuccessful applications?

Yes.

Show/List displays all of your proposals regardless of their status e.g. successful, unsuccessful

Why can't I see my application ID?

When searching: Enter the application in ID in the search field: **Sponsor Program #**

When viewing a proposal: the Application ID can be seen at the top of the **Sponsor** screen.

Why can't I see my proposal?

- Check search criteria, some fields are case sensitive.
- If search results are displayed over multiple pages use the next and previous button to view all results.
- Have you received notification from Grants Management Office regarding the creation of your proposal? If not contact the relevant Grants Management Office team.

I'm an Administrator and can't find the proposal I'm looking for?

Check the correct search criteria has been entered; Proposal Number, Finance Reference
Check the Caps Lock and Num Lock keys – the Finance Reference is case sensitive.
Note: you will only see the proposals for which you have access to view. If in doubt please email GMO Operations.

How can I find records for collaborating institutions or partner organisations?

Records used to document contributions from collaborating institutions are known as **Related Proposals**, and are created only when it is known the proposal has been successful.
Refer to "How do I find a Related Proposal".

Where can I find the status of my proposal?

The Proposal Status can be found at the top right side of the **Summary** screen and in the **Status History** folder.

Where can I find the definition of a Proposal Status?

Proposal Status definitions can be found in the appendices section of the InfoEd PT Reference Guide.

The Guide can be found on the GMO Website:
http://www.gmo.unsw.edu.au/InfoEd/infoed_index.html

Why has my proposal not progressed from its current status?

Documentation and compliance checks are undertaken by Grants Management Office, Finance and Legal teams which will affect the status of a proposal.

Where will the sponsor and scheme name appear?

The Sponsor and Scheme name is visible in all search results and proposal headers.

Where can I locate the Sponsor Award number?

The Sponsor Award number can be seen on the Sponsor screen.

Please refer to the Terminology table for more information.

Where can I find personnel involved in a research project?

- Open the proposal
- Click the **Personnel** folder

When are personnel added to the proposal?

Personnel will be added to InfoEd at different stages:

- Prior to submission of application to the sponsor only the CI will be added
- Following submission of the application to the sponsor all UNSW personnel will be added
- Upon announcement (successful) external personnel will be added

What does the order of personnel signify?

The order of personnel is taken exactly as they appear in the application. The primary CI is indicated by the radio button.

Where can I find information on a project's remaining money?

View the **Awards** folder then click **Enterprise System Reporting**

- Select **Fiscal Year, Fiscal Period & report type**
- Click **Generate Report**
- Financial report will appear.

Where can I find information regarding the allocation of an Award?

The Award Detail folder contains data regarding the allocation of award for respective periods of the project.

Will I be able to print the award page?

Yes.

- Open the Awards screen
- Right mouse click
- Print

Where do I find information about the awarded funds?

Award information is outlined in the Awards folders.

What is the Finance Reference?

The Finance Reference is the NSS Finance Project Code or account number.
The Finance Reference is generated by the Finance Department when an application is successful.

Where is the Finance Reference?

The Finance Reference is located at the top right corner of the Summary screen.

It is also displays in the header of the record.

**Will the Budget screen show me
how much I have been awarded
in total?**

No.

The Budget screen shows the amount requested from the sponsor. The actual awarded amount can be seen on the Awards screen.



What's the difference between Budget and Award?

The Budget is the amount requested from the sponsor at the time of application. The Award is the actual amount awarded by the sponsor when the application is successful.

What is the Enterprise System Reporting?

This function runs a link to NSSFin and allows you to obtain financial reports for the project account.

How do I add an attachment to my InfoEd proposal?

You can not add attachments.
Grants Management Office teams will attach any documentation and communication specifically related to your research grant.

Where can I find the Award letter from the Sponsor?

In the Attachments folder.

How do I open an attachment?

- Go to **Attachments** folder
- Click the glasses to open the attachment

Where can I see when my project reports are due?

Deliverables folder

All reporting requirements for the project are listed here.

Can I print the Deliverables screen?

Yes.

- Open the Deliverables screen
- Right mouse click
- Print

Will I receive a reminder for each report due?

No.

InfoEd does not generate reminders for individual reports.

Can I view my own financial reports?

Yes.

You can use Enterprise System Reporting to generate standard reports, including Monthly Research Statements and Project Transaction Lists.



Can I generate my own reports using InfoEd?

No.

Contact the relevant Grants Management Office team with your reporting requirements.

What is a Related Proposal?

A record documenting funds from faculty, collaborating organisation or industry partner.

When will a Related Proposal be created?

Related Proposals are created when an application is successful.
Some examples include:
Industry Partner records in Linkage Projects, or
Collaborating Organisations in a LIEF Project.

How do I find a Related Proposal?

Click the **Related Proposals** folder in the Side Bar.



Why can't I see the budget in my Related Proposals?

The Budget folder within a Related Proposal is not populated.
The main proposal holds details of the requested amount from the sponsor.

Where can I find the cash and in-kind contributions for collaborating organisations in a project?

Submitted proposals: in the main proposal, Budget folder Detail folder, view the proposed cash and in kind contributions in the User Defined Fields

Successful: in the main proposal, Related Proposal folder, open related proposal, Click Award folder, Click Detail folder, view the proposed cash and in kind contributions in the User Defined Fields



How do I identify the main proposal amongst a group of Related Proposals?

- Related Proposals folder
- All Related Proposals are listed
- Check details in the Sponsor and Scheme column.

Why can I only see the CI in my Related Proposals?

The CI is the only named person in a Related Proposal. The main proposal contains all personnel involved in the project.

Why can't I see my Related Proposal/s?

Related Proposals are only created when an application has been announced as successful.

What is a Sub Project?

Record created to manage a component of a project which requires a separate account number.

When will a Sub Project be created?

Sub projects are created when an application is successful and includes either:

- an embedded Fellowship or Scholarship, or
- when funds are to be split across multiple sub accounts, or
- when investigators are from different faculties

How do I find a Sub Project?

Sub Projects folder from the Side Bar of the Parent Proposal

Or

- Show/List to display all your proposals
- Select Sub Project from the search results

How can I identify a Sub Project?

A watermark appears on each screen of the Sub Project
The Sub Project's Proposal Number has an extension of
the number -1, -2, etc.

How do I open my Sub Projects?

- Open Parent proposal
- Awards folder
- Scroll to the Sub Project's Award Information
- Click the open icon

What is the Parent Proposal?

The Parent Proposal is the main record which the Sub project is connected to.

Where can I find the reporting requirements within a Sub Project?

With the exception of APAI Progress and APAI Final reports all reporting requirements can be found in the Deliverables folder of the Parent proposal.

My project requires funds to be managed separately. How can I view this in InfoEd?

Separately managed fund can be viewed in Sub Projects.

Why can't I see my Sub Projects?

Sub Projects are only created when an application is announced as successful.

Why can't I open my Sub Project from Sub Projects folder of the Parent Proposal?

This is an identified issue in InfoEd which is currently in the process of being resolved.

Alternate ways to open a Sub Project:

- Open Awards folder
- Scroll to the Sub Project's Award Information
- Click the open icon of the required Sub Project



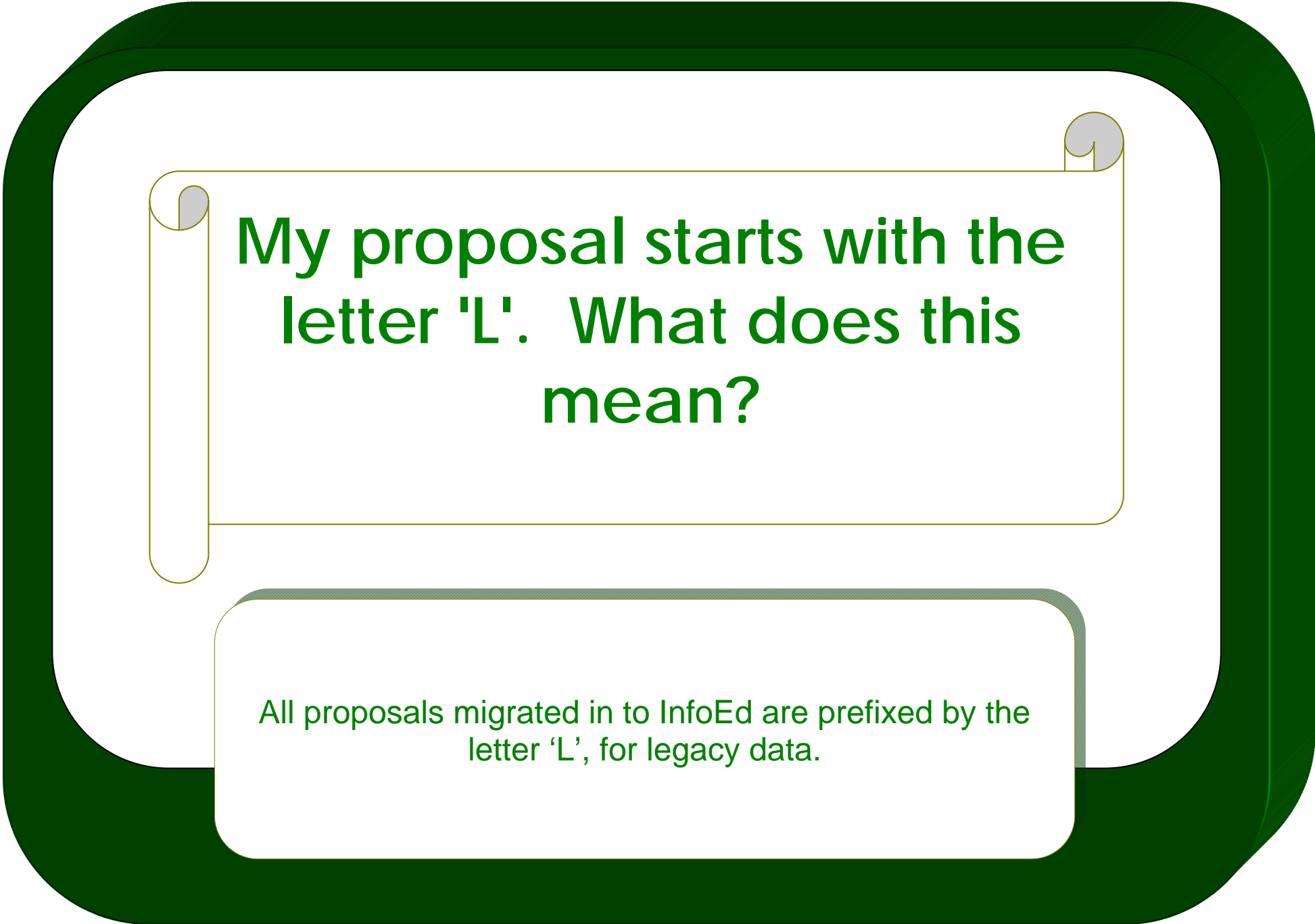
Why can't I edit my proposal?

UNSW personnel have view only access in Proposal Tracking.

What is a Proposal Number?

The Proposal Number is a unique ID generated by InfoEd. RG followed by 2 digits signifying the year. RG091234.

Proposal numbers may also begin with LYYYY####, indicating it is Legacy data.



**My proposal starts with the
letter 'L'. What does this
mean?**

All proposals migrated in to InfoEd are prefixed by the
letter 'L', for legacy data.

What is the Internal File?

TRIM research file number

Where can I find the Internal File number?

The Internal File number can be found on the top right hand side of the Summary folder.

What's the difference between a record and a proposal?

The words 'proposal' and 'record' are interchangeable. Both refer to details entered in InfoEd for a research application.

What are UDFs?

User Defined Fields are a UNSW customisation in InfoEd. UDFs can be found at the bottom of some screens within a proposal.

Who should I contact if I want to find out how to submit a research proposal?

Please refer to the Grants Management Office website.

www.gmo.unsw.edu.au

Why are some fields of my proposal blank?

Data is entered throughout various phases of a proposal. Some fields within a proposal are not used by UNSW and therefore they will remain blank.

Who do I contact if I see incorrect information?

Please contact Grants Management Office:
GMO Operations Team.
Incorrect personal information contact Human Resources.

How do I view the details of a proposal?

- Place the mouse pointer over the yellow folder
- Action icons display
- Click glasses
- The proposal will open in a new window.