**Quick Start Guide: InfoEd Proposal Tracking (PT)**

**ACCESS**
- UNSW personnel have **view only** access in PT.
- Your InfoEd access level determines what proposals you can see.

**LOG IN TO INFOED**
1. Open your Internet Browser and enter the following URL:
   http://www.myresearch.unsw.edu.au
2. Type your **User name**, then **Password**. (Both are case sensitive).
3. Click **Login**.

**SEARCH FUNCTIONS**
A number of options can be used to search for records.
- **SHOW LIST...**
  - Select **My Proposals > Show List**.
    - This option displays results only if you are identified as the **Primary CI** on proposals.

- **LOCATE...**
  - Select **My Proposals > Search For** (leave all search fields blank), then click **Locate**.
  - This will display a list of all proposals your InfoEd access level permits you to see.
  - If you are a **researcher**: results display proposals on which you are the **Primary CI** and others on which you are a named investigator.
  - If you are a **Dept. Administrator**: results display all proposals your access level permits you to see.

- **SEARCH FOR...**
  - Select **My Proposals > Search For** then enter criteria in one or more search fields.
  - **Some search fields are:**
    1. **Proposal number** RG171532
       - This is the unique ID generated by InfoEd when a new record is created.
    2. **Sponsor** Discovery Project
       - To select a specific sponsor and scheme.
    3. **CI** Smith, Sarah (Faculty of )
       - To specify the name of the Chief Investigator. i.e. the **Primary CI**.
    4. **Finance Ref** RG171532
       - This refers to the Project Code. This field is case sensitive.
    5. **Investigator** Jones, Harold (Sch of )
       - To specify the name of any investigator. Results will display proposals on which this person is:
         - the **Primary CI**, and
         - proposals on which they are a named investigator.
       - Click **Locate** to generate search results.
       - To clear existing search criteria and the search results click **Clear All**.

- **WILDCARD * (ASTERISK)...**
  - The * wildcard can be used to replace text and/or digits when an exact match is not known. **e.g.**
    - Finance Ref **RG17** to return records with a Finance Ref commencing RG17...
    - Title **“the effects of myocardial...** to return records in which these words are contiguous in the Project Title.

**OPEN A PROPOSAL**
1. From the search results, place the mouse pointer over the folder icon to display the action icons:
2. Click **.**
   - The proposal opens in a new window in **view only mode**. The Summary screen displays by default.

**FINANCIAL REPORTS**
1. Click the **folder.**
2. Click **Enterprise System Reporting**
   - The Enterprise System Reporting window displays and is populated with the Finance Reference.
3. Specify the **Fiscal Year.**
4. Select the **Fiscal Period.**
5. Select the **Report Desired** from the drop down list.
6. Click **Generate Report**
   - InfoEd automatically logs in to the New South Financials system, and a series of processing messages display.
   - Your request is placed in a queue and may take a little time depending on the level of demand.
   - When complete, the report is generated in PDF format and opens in a new window.
7. **View, print and /or save** the report.
8. **Close** the report window.
9. **Sign Out** of the New South Financials system.
10. **Close** the New South Financials window.

**ATTACHMENTS**
The Attachments screen contains a variety of documents associated with the proposal. The actual content will vary depending on the type of application and also the stage of the application/research project.
1. Click the **folder.**
2. The Attachments screen displays.
3. Click **to open an attachment.

**DELIVERABLES**
The Deliverables screen displays a schedule of reports due to be delivered to the sponsor over the duration of the project.
1. Click the **folder.**
2. The Deliverables screen displays.
3. **Click to open an attachment.**
SUB-PROJECTS
Sub Projects are additional records directly associated with the main InfoEd record. They are created when a successful application includes e.g. an embedded Fellowship and/or Scholarship. The Sub Project holds the same Proposal Number as the main proposal, and is appended by -A, -B -C. e.g. RG171532-A, RG171532-B.

1. Click the SubProjects (1) folder.
   The Sub Projects screen displays.
2. To open, click

RELATED PROPOSALS
Related Proposals create a two way link between 2 or more proposals. Related Proposals are typically used (though not exclusively) for Linkage and LIEF projects, when a PT record is created for each contributing organisation in the project.

1. Click the Related Proposals (3) folder.
   The Related Proposals screen displays.
2. To open, click

KEY PROJECT STATUSES
From the search screen, click Show Additional Search Options to display the Project Status field.

- **Pre-Submission**
  The application is underway but not yet submitted to sponsor.

- **Submitted (pending)**
  The application has been submitted and is awaiting outcomes.

- **GMO Release Pending**
  The application has been successful and post award administration in process for the release of funding (e.g., Acceptance of Grant Form, legal review).

- **Successful Under Management**
  The application has been successful, and the project is underway.

- **Pending Closure**
  Project is undergoing close out procedures.

- **Closed**
  The project and the account are closed.

CLOSE A PROPOSAL
- Click (top left of the proposal screen).

LOG OUT of INFOED
- Click (top left of the search screen).

FURTHER INFORMATION
For more information on these and other topics, please see the InfoEd PT Reference Guide available on the GMO website.