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. Remember your access level determines what you can see.

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** - This is the unique ID generated by InfoEd when a new record is created.
2. **Sponsor** - To select a specific sponsor and scheme.
3. **CI** - To specify the name of the Chief Investigator, i.e. the Primary CI.
4. **Finance Ref** - This refers to the Project Code. This field is case sensitive.
5. **Investigator** - 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**: to return records with a Finance Ref commencing RMM12...
- **Title**: to return records in which these words are contiguous in the Project Title.

**SET FIELDS...**
Some search fields display a **Set** link, which allows you to select data from a pick list.

1. Click **Set** to display the pick list window.
2. Click the relevant letter of the alphabet then:
   - choose from a drop down list, or
   - type what you are looking for in the **Search for** a particular field.
3. When you have found the item, click **Select** or **Save** to close the pick list and display the data in the search field.
4. Click **Locate** to display search results.

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 **Enterprise System Reporting** folder.
2. Click **Generate Report**.
   - The Enterprise System Reporting window displays and is populated with the Finance Reference.
   - Specify the Fiscal Year.
   - Select the Fiscal Period.
   - Select the Report Desired from the drop down list.
   - 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.
3. **View**, **print** and **/or save** the report.
4. **Close** the report window.
5. **Sign Out** of the New South Financials system.
6. **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 Attachments (9) folder.
The Attachments screen displays.
2. 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.

- Click the Deliverables (4) folder.
The Deliverables screen displays a list of items and their status (e.g. pending, submitted).

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 -1, -2, -3. e.g. RG091234-1, RG091234-2

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.

- 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.