

## 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

- Open your Internet Browser and enter the following URL:  
<http://www.myresearch.unsw.edu.au>
- Type your **User name**, then **Password**. (Both are case sensitive).
- 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 .

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:**

- Proposal number** 

This is the unique ID generated by InfoEd when a new record is created.
- Sponsor**  

To select a specific sponsor **and** scheme.
- CI**  

To specify the name of the Chief Investigator. i.e. the **Primary CI**.
- Finance Ref** 

This refers to the Project Code. This field is case sensitive.
- 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  to generate search results.
  - To clear existing search criteria **and** the search results click .

#### ➤ 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.

Property	Value	Property	Value
Proposal number	<input type="text"/>	Finance Ref	<input type="text"/>
Sponsor	<input type="text"/>	Proposal Status	<input type="text"/>
CI	<input type="text"/>	Primary Assoc Dept	<input type="text"/>

 Show Additional Search Options

- Click **Set** to display the pick list window.
- 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.
- When you have found the item, click  or  to close the pick list and display the data in the search field.
- Click  to display search results.

### OPEN A PROPOSAL

- From the search results, place the mouse pointer over the folder icon to display the action icons:



- Click . The proposal opens in a new window in **view only mode**. The Summary screen displays by default.

### FINANCIAL REPORTS

- Click the  **Awards (2)** folder.
- Click **Enterprise System Reporting**. 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.
- View, print** and /or **save** the report.
- Close** the report window.
- Sign Out** of the New South Financials system.
- Close** the New South Financials window.

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

### 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  **Done** (top left of the proposal screen).

### LOG OUT of INFOED

- Click  **Exit** (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.