Locating and Opening a Proposal Record

InfoEd stores a wealth of grant proposal and award information that can be especially helpful for faculty and staff. This document details the process of locating and opening a proposal record.

**Step 1:** After logging in to InfoEd ([https://unrprod.infoedglobal.com/](https://unrprod.infoedglobal.com/)), click on the My Proposals bar to expand available options and select Search For. The Search For screen will then appear.

**Step 2:** Records are searchable by a number of criteria such as proposal number, investigator last name, sponsor name, etc. Enter search criteria in the corresponding search field and click Locate in the upper right area of the screen to reveal matching records.

**Step 3:** Locate the desired record. Using the computer mouse, hover over the file folder icon to expand available access options. Records can be opened for editing (pencil and paper icon) or view only (eyeglass icon) in either the Proposal Development (PD) module or Proposal Tracking (PT) module. PD is used by investigators to prepare a proposal while PT is used by sponsored projects staff to review and track a proposal. Depending upon one’s security access, a record may be available for view access only.

**Opening a Record in PD:** PD (Proposal Development) records are proposals prepared by project investigators. Viewing a PD record will reveal a variety of proposal information such as personnel, budget, the OSP-1 Transmittal eForm and any uploaded proposal materials. Note: Not every InfoEd proposal record will have an associated PD record since not all proposals in InfoEd begin as a PD record. If a proposal was not prepared in InfoEd and routed for internal approval in InfoEd, there will be no PD record. There will, however, be a PT record. Below is an example of a PD record. The red boxed area
reflects the different contents (or tabs) of the proposal which may be accessed simply by clicking on the desired content tab.

Opening a Record in PT: PT (Proposal Tracking) records are automatically created when a PD record is created. Office of Sponsored Projects (OSP) staff utilize the PT record to record the proposal review process. Users who are not OSP staff will only be able to access a PT in view mode. A PT record can be helpful if one needs to locate proposal and corresponding award materials. For example, if a proposal has been awarded, a copy of the award agreement will be stored in the PT record in the Attachments tab. Like in a PD record, users can access the different areas of the PT record by clicking on the desired tab. In the example PT record below, the red boxed area reflects the areas (or tabs) in the PT record. Note that the Attachments tab is boxed in blue.
Exiting a Record: When a user is done viewing a record, the record should be exited using the Done button which logs the user out of the record. If one exits a record by simply closing their browser window, the user will remain logged into the record.