InfoEd: New Scholarly Endeavor Grant Application Instructions

I. Access InfoEd and Create a New Proposal


- Once logged into InfoEd, click “My Proposals” (left side of screen), and select “Create New Proposal.” (Note: If “Create New Proposal” is not visible, please contact Yvonne Callan: ycallan@unr.edu or 784-8262).

- The “New Proposal Questionnaire” screen will now appear in a pop-up window and present the user with a series of questions (detailed below).

II. New Proposal Questionnaire Screen Questions

- Step 0, Confirm PI: Confirm that the PI (principal investigator) shown on the screen is correct. To change the PI name, click the “Change PI” button, enter individual’s last name (matches appear) and click to select individual.

- Step 1, Create “New” Proposal is selected by default, so click the “Continue to Next Step” button to advance.

- Step 1 Continued: From the pick list, select “Setup Proposal Manually,” and click “Continue to Next Step.”

- Step 2, Select Proposal Type: From the pick list, select “New/Original,” and click “Continue to Next Step.”

- Step 3, Select a Sponsor: The sponsor will be “UNR OVPRI New Scholarly Endeavor Grants.” Begin entering the sponsor name in the field provided, and select “UNR OVPRI New Scholarly Endeavor Grants.” Next, click “Continue to Next Step.”
• Step 4: This step will be skipped, and the proposal number will be assigned by the InfoEd system.

• Step 5, Enter the Proposal’s Title: In the field provided, enter your project title. Then, click “Continue to the Next Step.”

• Step 6, Project Start and End Dates: Click the calendar icon to the right of each date field to select the start and end dates, and click “Continue to Next Step.”

• Step 7, Years and/or Budget Periods: Select “1” from the pick list, and click “Continue to Next Step.”

• Review the information entered in steps 0-7. If corrections are needed, use the button, “No, Go back and make changes.” If all information is correct, click “Yes, Create Proposal.”

• InfoEd will create the proposal record, and the “Setup Questions (Step 8)” will appear. Note that the proposal number is visible in the upper right corner of the screen.

• Step 8, Setup Questions: Follow the on screen instructions which address the “Deadline Information,” “General Proposal Properties” and “Additional Information” sections of the screen.

III. Add Additional UNR Key Personnel

You should now be on the Personnel screen. Here you will add any additional UNR key personnel to the proposal record.
To add an individual, enter their last name in the field provided and click to select. Next, make a selection from the “Role” pick list. Then, click the “Add” button, and the individual will be added to the “Key” section of the screen.

When done adding personnel, click the “Completed” box in the upper right corner of the screen.

IV. Upload Proposal Documents

Navigate to the Proposal Docs screen via the left navigation (click on the Proposal Docs bar). Here, applicants will upload all required proposal documents. Please follow the on screen instructions.

V. Complete the Transmittal Form

Navigate to the Transmittal Form screen via the left navigation. Here, applicants will complete the mandatory Transmittal Form. When you see the form (will largely be blank at first), select “e. R&I New Scholarly Endeavor Grant Application” from the “Select Submission Type” pick list. The form questions will then load. Some form fields will auto-fill. Complete any remaining, uncompleted form fields. Once all questions have been answered, check the "Complete" box in the upper right corner of the form.

VI. Finalize Screen

Navigate to the Transmittal Form screen via the left navigation. Here, you will build the Transmittal Form into a PDF, and then route the proposal for internal approval and receipt by the Research & Innovation office.

First, click the “Build” button.

After the Transmittal Form has been converted to PDF, InfoEd will advance you to the “Submit for Internal Review” section the screen. The Transmittal Form will appear in the “Form/Document Name” table as “Assembled Doc.” Next, initiate routing click the thumbs up icon to the right of “Submit Final Review.”
A pop-up window will appear showing the route path and the individual(s) to be contacted in each route step. You must click the “Submit” button to activate the route.

VII. Internal Review Route Steps and Approval Actions

- Step 1, Investigator Approval: UNR key personnel will be the first individuals to approve the proposal. Individuals included in Step 1 will receive an email notification to review and approve the proposal in InfoEd. In the email, follow the link to the “Reviewer Dashboard,” and once you have reached the “Reviewer Dashboard,” follow the instructions below.
- The main part of the “Reviewer Dashboard” (illustration below) is a table listing the proposal materials requiring review. Review an item by clicking the corresponding “View” button in the “Open” column.
- Once the proposal materials have been reviewed, click each radio button in the green, “Reviewed” column, and then click the “Save” button (computer disk icon) in the upper right corner of the screen.
- Now, locate the “My Decision is” pick list in the middle of the screen, select “Approved,” and then click the “Save” button in the upper right corner of the screen to log your decision.
- Once all investigators listed in the route Step 1 have approved the proposal, Step 1 will be satisfied, and the route will advance to the next step. In route Step 2, the chair(s)/director(s) representing the investigator department(s) will approve. Once route Step 2 is satisfied, the route will advance to Step 3 for dean/VP approval(s). Once Step 3 is satisfied, the route will advance to Step 4 where Yvonne Callan in the Research & Innovation (R&I)) will review the proposal materials for completeness. If the proposal is complete, Yvonne will approve the proposal, and all proposal
investigators will receive an email confirmation that their proposal has been received by R&I. This email is your official submission receipt. (Note: Applicants whose proposals have been selected for an award will be notified at a later date.)

VIII. Monitoring the Route Progress

- One can view the route progress by revisiting the “Finalize” screen of the proposal record. Once the “Finalize” screen fully loads, the routing progress” will appear at the bottom of the screen.

IX. User Support

- Please contact Yvonne Callan for assistance: ycallan@unr.edu or 775-784-8262.