InfoEd New Scholarly Endeavor Grant Application Instructions

I. Access InfoEd and Create a New Proposal

A. Access InfoEd at https://unrprod.infoedglobal.com. Click the “Login” button on the left side of the screen, and when prompted, enter your NetID and password.

B. 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 Erika Waday, ewaday@unr.edu).

C. The “New Proposal Questionnaire” screen appears in a pop-up window, presenting the user with a series of questions (detailed below).

II. New Proposal Questionnaire Screen Questions

A. Step 0, Confirm PI: Confirm the PI (principal investigator) name listed is correct. If correct, continue to step B below.

To change the PI, click the “Change PI” button and a pop-up screen appears. Begin entering a last name, select the individual from the results, and then click the “Select” button. The PI listed in Step 0 should now reflect the individual previously selected. Now, continue to Step B below.

B. Step 1, Create “New” Proposal: Click the “Continue to Next Step” button to advance.

C. Step 1 Continued: From the drop-down list, select “Setup Proposal Manually,” and then click the “Continue to Next Step” button.

D. Step 2, Select Proposal Type: Confirm that “New/Original” is selected as the Proposal Type, and then click the “Continue to Next Step” button.
E. Select a Sponsor: The sponsor is “UNR Research & Innovation New Scholarly Endeavor Grant Program.” In the field provided, begin entering the sponsor name, and select sponsor from the results. Then, click the “Continue to Next Step” button.

F. Step 4 is skipped. The InfoEd system will assign the proposal number later in the setup questions process.

G. Step 5, Proposal Title: In the field provided, enter the desired name, and then click the “Continue to Next Step” button.

H. 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. Then, click “Continue to Next Step.”

I. Step 7, Years and/or Budget Periods: Confirm that “1” is selected as the number of years/budget periods, and click “Continue to Next Step.”

J. Review the information entered in steps 0-7. If all is correct, click “Yes, Create Proposal.” If corrections are needed, use the “No, Go back and make changes” button and/or the “Back” button (upper right of screen) to make corrections. Then, click “Continue to Next Step” to advance until you are able to select, “Yes, Create Proposal.”

InfoEd will then 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 (see illustration next page). Then, follow the on-screen instructions for completing the screen.
III. Personnel

Access the Personnel screen by clicking “Personnel” on the left navigation. On this screen, additional participating key personnel will be added to the proposal record. To add an individual, begin entering a last name in the “Name (Last, First)” field, and click on the desired person. Then, select from the “Role” drop-down list, and click “Add.” Repeat to add further personnel.

When all key personnel have been added, check the Completed” box in the upper right of the screen.

IV. Proposal Docs & Forms

Access the Personnel screen by clicking “Personnel” on the left navigation. On this screen, all application materials will be uploaded. To upload materials, follow the on-screen instructions.

V. Transmittal Form

Access the Transmittal Form screen by clicking “Transmittal Form” on the left navigation. On this screen is an internal form requiring completion.
Load the pertinent Transmittal Form fields, by selecting “R&I New Scholarly Grant Application” from the “Select Submission Type” drop-down list. The form fields and questions will load. Answer all questions and address any fields. When done, check the “Completed” box in the upper right of the screen.

**VI. Finalize**

Access the Finalize screen by clicking “Finalize on the left navigation. On this screen you will generate a PDF of the Transmittal Form and submit the application for internal review. Once on the Finalize screen, follow the on-screen instructions.

When you reach the Submit for Internal Review section of the Finalize screen, be sure to click the “Submit Final Review thumbs up” icon.

The pre-configured internal review route path will then appear listing the route steps. Be sure to click the “Submit” button to initiate the route.

**VII. Internal Review Route and Approval Actions**

A. The internal review route is comprised of the following steps:

   Step 1, Investigator Approvals: In this step, all University participating key personnel will review the application.

   Step 2, Chair/Director Approvals: In this step, the chair(s)/director(s) representing the key personnel in Step 1 will review the application.

   Step 3, Dean/VP Approvals: In this step, the dean(s)/VP(s) representing the key personnel in Step 1 will review the application.

   Step 4, R&I Receipt: In this step, Yvonne Callan in the Research & Innovation (R&I) office will review the application.

   Step 5, Application Received Notice: In this step, the key personnel in Step 1 will receive an email indicating that their application was received by the R&I office.
The route will automatically advance to the next step once the current step has been completed.

B. As principal investigator (PI), you will need to review the application in Step 1 of the internal review route. Once the application is submitted to the internal review route, you will receive an email notification to review your application in InfoEd. The email will contain a link to the “Reviewer Dashboard” where you perform your review. Follow that link, and once you have reached the “Reviewer Dashboard,” follow the instructions below.

C. The main part of the “Reviewer Dashboard” (illustration below) is a table listing the application materials requiring review. Review the materials by clicking the corresponding “View” buttons in the “Open” column. Then, indicate that you have reviewed the materials by clicking the radio buttons in the “Reviewed” column. Next, click the “Save” button in the upper right of the screen to log your review.

Now, locate the “My Decision is” drop-down 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. That’s it! You’ve just approved your application, and the remainder of the route will progress automatically. When the application is received by the R&I office, you will receive an email notification.

VIII. User Support

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