Locating an Existing Record In InfoEd

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General Notes

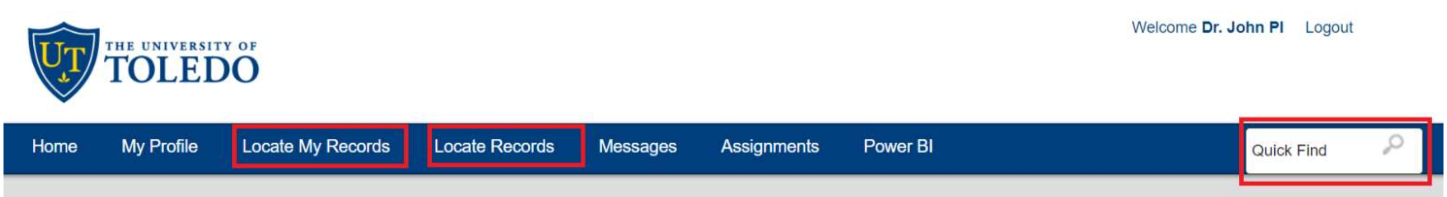
This document is intended to describe how to locate a record in InfoEd. Capitalized words indicate an object in InfoEd. Italicized words indicate a field or parameter in that object or the name of additional reference documents. Bold is used for emphasis in lists.

Common Objects or Terms in InfoEd

User: A person who can log in and use InfoEd
Portal: The landing page that is first seen after logging in, a.k.a. the Home page
Record: A generic term for an object in the system such as a Proposal or a COI Disclosure
S2S: An abbreviation for system-to-system submissions when a proposal can be sent directly from InfoEd to the sponsor
Widget: A generic term for the white text boxes on the portal screen (a wide variety of widgets are available in InfoEd with additional widgets developed as needed)

Locating an Existing Record to View or Edit

InfoEd has three mechanisms for finding records that already exist. All are in the top blue bar menu.



Locate My Records

Allows the user to find any records on which they are the record owner. In the context of Disclosures, the Record Owner is the discloser. In the context of Proposals or Awards, the Record Owner is the PI only. Click "Locate My Records" to be immediately presented with a list of records you own.

Locate Records

Allows the user to use filters to find any records for which the user has permissions. If the user has a role on a proposal other than PI, they can use "Locate Records" to find that record. Department admins, department chairs, and college deans will have access to records on which people in their departments or colleges are listed.

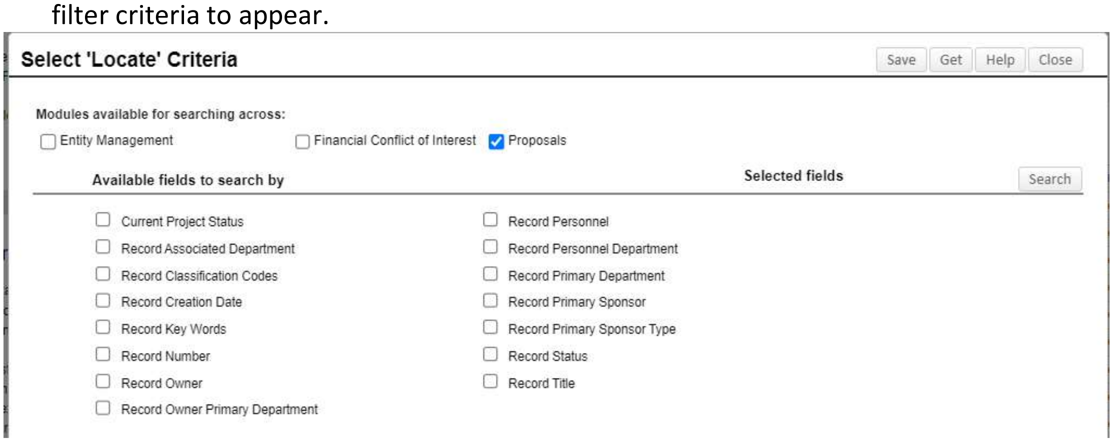
Quick Find

Allows the user to search for a string of numbers or characters. The fields searched are record owner, record title, and record number. The records returned have the string of characters in one of those three fields. Only those records that the logged in user has access to will be display in the returned results.

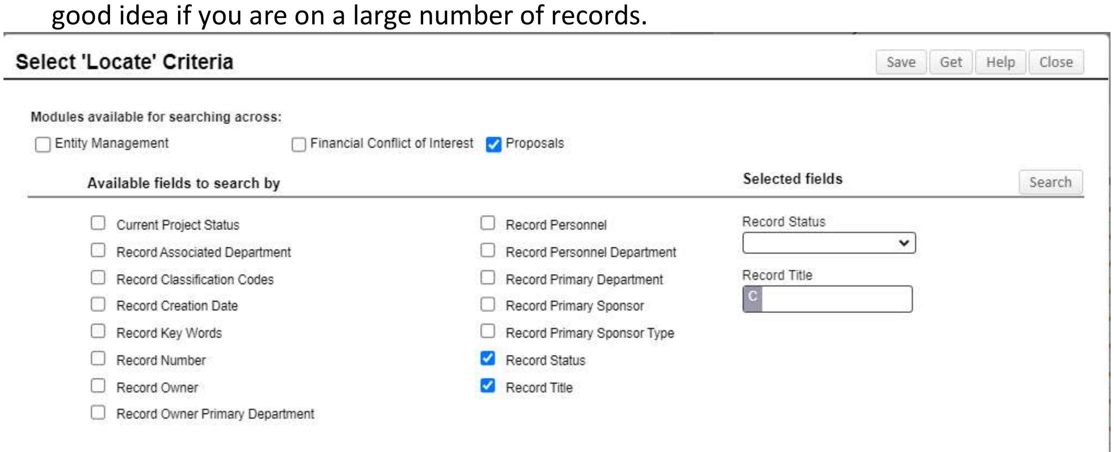
Locate Records – Search using Filters

Click Locate Records to bring up the search and filter window.

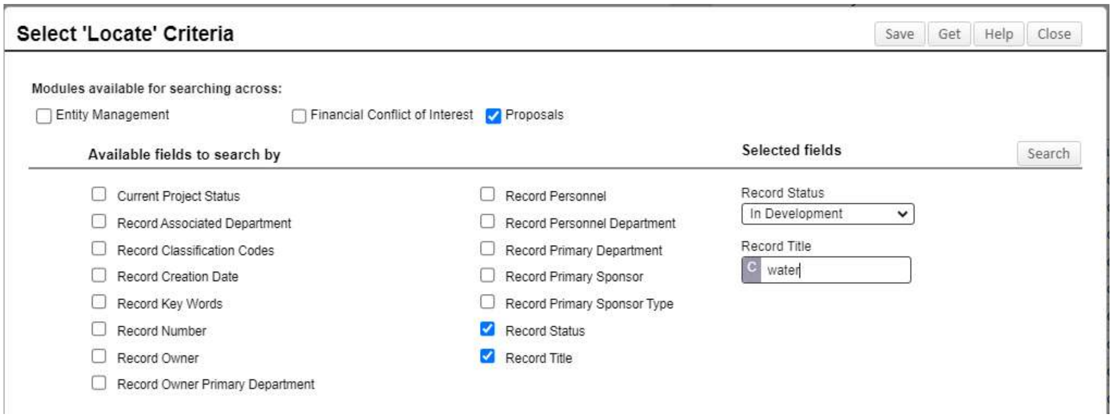
1. Select the module by clicking the appropriate checkbox, which will usually be "Proposals." This will cause a list of filter criteria to appear.



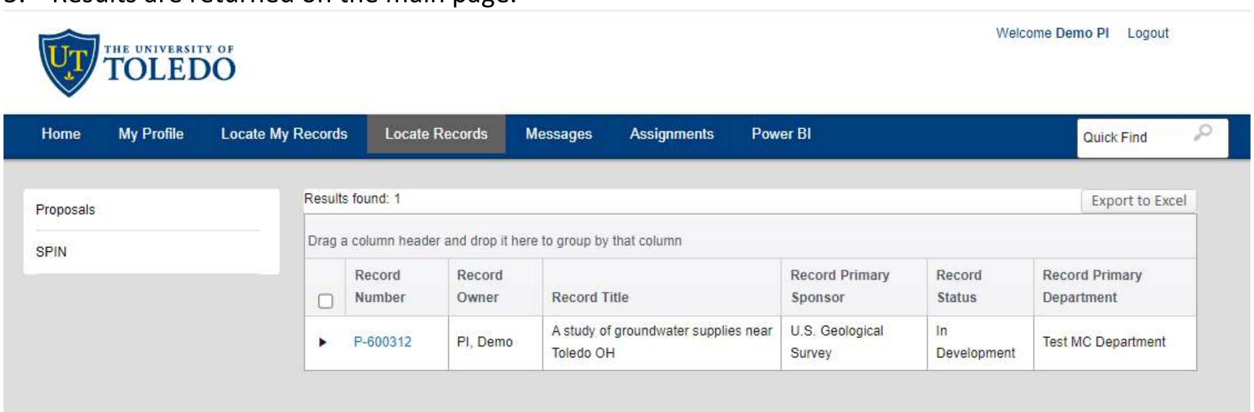
2. Select one or more criteria you wish to use as a filter. Note: Selecting filter criteria is not required but may be a good idea if you are on a large number of records.



3. Put the filter data in the selected fields, e.g. a specific status or part of the record title. Note: The filter criteria are applied in an *AND* fashion and will return results that meet ALL criteria selected. This below example can be read as “list all records that I have access to where the current status is ‘In Development’ and the title contains the characters ‘water.’” Fields are not case-sensitive.

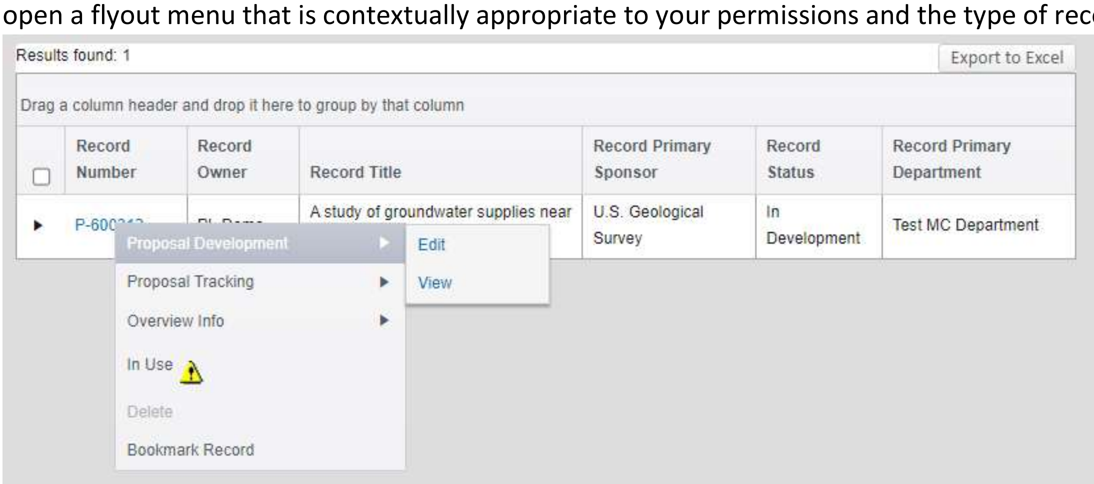


4. Click the Search button on the right.
5. Results are returned on the main page.



Opening a Record in View or Edit

Once you have search results, click on the desired link in Record Number or Record Type column on the left. This will open a flyout menu that is contextually appropriate to your permissions and the type of record selected.



For Proposals, most of the work for the researcher is done in Proposal Development. Hover over that menu item to get another flyout menu with the selection of “Edit” or “View.” Click “Edit” or “View” as appropriate. The record will open in a new window. The search will be preserved on the main portal screen “behind” the record window.

Important Notes on Record Access In InfoEd

Records can only be opened for editing by one person at a time. If someone else has the record open for editing, the next person to open it can only open it in “View” mode, even though the “Edit” mode appears to be available.

The “In Use” item in the flyout menu will tell you who currently has the record open. If there is no “In Use” menu item, the record is available to open in “Edit” mode.

If you select “View Mode,” even if you are the only one in the record, you will not be able to make changes or submit to route.

If another user forgets to use the “Done” button on a record and just leaves the proposal open or walks away, the record will be unlocked automatically after 60 minutes of inactivity.