

Help Guide – Introduction to the Reviewer Dashboard & Endorsement Process

Logging Into InfoEd

Access InfoEd at infoed.utoledo.edu.

This will take you to the Tower login page. Log in using your UTAD username and password.

Accessing Your Reviewer Dashboard

When a proposal requires your endorsement, you will receive an email notification from infoed@utoledo.edu (or urfo@utoledo.edu for URFO programs). The email is sent from a system account, but you CAN reply to it (if needed) and the reply will be sent to a monitored mailbox.

In the email you will see a link to your Reviewer Dashboard, which allows you to review relevant details about the proposal and submit your endorsement decision and any comments (if applicable). If you are already logged into InfoEd, you can click directly on the Reviewer Dashboard link in the notification email and it will open automatically in a new window. If you are not already logged into InfoEd, when you click the link you will be prompted to login with your UTAD credentials first and then the Reviewer Dashboard will open. You can also access the Reviewer Dashboard by navigating to the “Assignments” tab in the top menu bar of your InfoEd portal where you will see a list of all proposals requiring your endorsement.

***Please note: You will need to turn off the popup blocker on your browser BEFORE accessing the Reviewer Dashboard! See Appendix A at the end of this Help Guide for browser-specific instructions on turning off the blocker.**

Orientation to the Reviewer Dashboard

The Reviewer Dashboard contains links to all the information needed for a thorough review of the proposal, including budget and personnel details.

Dashboard Header

The header contains basic information about the item for review. For proposals, this includes the Record Number (link to the Proposal Development (PD) record), the PI name, the title of the project, and the sponsor.

Dashboard Side Tabs

The Dashboard automatically opens to the Review screen. However, there are three screens available in total along the left side of the dashboard:

- **Review:** Allows you to access links to the proposal record, record comments (if applicable), and submit your endorsement decision
- **Help:** Contains general instructions for the reviewer dashboard
- **Route:** Shows the full endorsement route for this proposal

Review Materials Links

In this section, you will find a list of the documents and eForms included in the proposal. You can review these here, or there will be another link to the Proposal Development Record here which will contain the full proposal collated in one package. **IMPORTANT:** Items in the list that have a drop-down menu must be changed to “Reviewed” or “Not applicable” before the decision buttons become active.

Comment Panes

There are four text areas for collecting comments to provide back to the PI, other reviewers, and administrators. You can put your comments in the box for the appropriate audience, but the comments may be visible to everyone. Your name will be attributed to your comments.

Decision Buttons

Once you have reviewed all the materials and then made your comments, you can complete your review by clicking one of the decision buttons.

- **Approve:** Approve as is, no requested changes. This decision allows the route to proceed forward.
- **Approve with Modifications:** Approve assuming that the modifications in the comments can be made. This decision allows the route to proceed forward but records the requested modifications in comments. The GC will review the requested modifications and decide how best to accommodate them.
- **Disapprove:** Indicates you are not willing to endorse the proposal at this time. If you click Disapprove, the route stops, and the PI gets an immediate email with the comments from the route. The proposal will return to “In Development Status.” The PI can re-submit the proposal, but it will need to come back through the route again. Do not choose Disapprove unless you are certain that you cannot conditionally approve it.

Certification Text

When you click either Approve or Approve with Modifications, you will be presented with certification text relevant to your role on the project. You must accept the certification text to finalize your approval. If you choose Decline, the route will neither proceed nor exit; it will remain in the same place until the certification text is accepted, or the route is disapproved.

Appendix A – How to turn off Pop-Up Blockers in your preferred web browser

Chrome

1. Open Chrome.
2. At the top right, click the vertical ellipses to get to the main menu.
3. Click Settings.
4. Click Privacy and security.
5. Click Site Settings.
6. Scroll down, click Pop-ups and redirects.
7. In the “Allowed to send pop-ups and use redirects” section, click Add.
8. Type <https://infoed.utoledo.edu> in the box and click Add.

Firefox

1. Open Firefox.
2. Click the hamburger menu in the upper right corner of the browser.
3. Click Settings.
4. Select the Privacy & Security panel.
5. Scroll down to the Permissions section.
6. In the “Block pop-up windows” line, click the Exceptions button.
7. In the address box, type <https://infoed.utoledo.edu>.
8. Click Allow.
9. Click Save Changes.

Edge

1. Open Edge.
2. Click the ellipses icon in the upper right corner of the browser.
3. Click Settings.
4. Click Cookies and Site Permissions.
5. Click Popups and redirects.
6. In the Allow box, click the Add button.
7. Type <https://infoed.utoledo.edu> in the box.
8. Click Add.

Safari

1. Open Safari
2. Open the site <https://infoed.utoledo.edu>
3. Click Settings.
4. Click Websites.
5. Click Pop-up Windows on the left. You may need to scroll down to see Pop-up Windows.
6. In the pop-up menu for the InfoEd website, choose Allow: Pop-ups for the website.