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Welcome

InfoEd Global is the leading provider of software solutions for managing sponsored programs. Worldwide, over six hundred academic, medical and scientific institutions rely on us to support their grant and contract activity. InfoEd Global's proven web-based modules streamline processes, enable proactive monitoring of compliance, and enhance internal and external collaboration.

InfoEd Global's eRA Portal connects investigators and administrators across departments, campuses, and continents, facilitating seamless research collaboration from concept-to-commercialization. This web-based portal provides a single convenient gateway to all of InfoEd Global's modules, creating a central online hub where the parties can jointly manage proposals, protocols, clinical trials, intellectual property disclosures, and other related records.
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Manual Conventions

Navigating to a particular setup often involves several separate clicks. Navigation instructions are abbreviated: **Profile > Employment > Add New**. The latter would be read as: “Select Profile, then Select Employment, and then Select Add New.”

Bolded words or terms direct users to click on a particular item or link. For example, “Click on Profile to open your profile for editing.”
1. Configuring Your Internet Browser

It is very important that your internet browser is properly configured to work with the InfoEd Global Suite. If the browser is not properly set up, unexpected results and errors may appear. It is because of this that we begin by making a quick check through your browser’s settings an essential setup before you begin to use the InfoEd Global software.

Of particular importance is the setting dictating how your browser caches files; this setting has different names and is found in different locations depending on the browser (Internet Explorer, Mozilla Firefox, and Safari) being used. However each browser may require a bit more tweaking for optimal performance with the InfoEd Global Suite. The following sections detail the necessary settings for each of the three internet browsers supported by InfoEd Global:

- Microsoft Internet Explorer (see 1.1. Internet Explorer).
- Mozilla Firefox (see 1.2. Mozilla Firefox).
- Apple Safari (see 1.3. Safari).

Note: while it may be possible to access and use the InfoEd Global Suite’s modules with other browsers, we only support these three; browsers other than these may cause unexpected errors.

1.1. Internet Explorer

Configuring Microsoft’s Internet Explorer (IE) browser for optimal performance with the InfoEd Global Suite primarily takes place with the Internet Options. Here we set up a few options to ensure that nothing is blocked from within IE.

To access the Internet Options menu, select Tools from the menu ribbon located at the top of the screen.

Once the Tools menu has opened, access the Internet Options by selecting Internet Options; the options replace the Tools menu.
Each of these screens in the Internet Options menu contains myriad setups used to tweak Internet Explorer. Of these, we are only interested in four settings located in different tabs:

- **General** – here we will set IE to always check for a new version of each page (see 1.1.1. IE General).
- **Security** – here we will set InfoEd Global.org as a trusted site (see 1.1.2. IE Security).
- **Advanced** – here we will enable friendly error messages (see 1.1.3. IE Advanced).
- **Privacy** – here we will turn off the popup blocker (see 1.1.4. IE Privacy).
1.1.1. IE General

In the General options for IE, we are altering the default options so that the browser will always check for a new version of each page that its user visits. While this does slow internet browsing by a small amount, it does ascertain that you will always have the most up to date information entered in every record or configuration to which you navigate in the InfoEd Global Suite.

Click the **Settings** button in the Browsing History section to open the Temporary Internet Files and History Settings screen.

We are only interested in altering the cache’s behavior; the other settings may be left alone. Select the radio button for “Every time I visit the webpage” and then click the **OK** button to register the change.
1.1.2. IE Security

In the Security options for IE, we are adding InfoEd Global.org to the list of trusted sites. This ensures that none of the functions of the InfoEd Global Suite’s modules will be blocked, either in part or in full, by the browser.

Click the **Security** tab in the Internet Options menu to open the Security screen.

By default the Security screen opens displaying the options for overall internet security. Select the **Trusted sites** icon to display the security settings for trusted sites and then click the **Sites** button to open the Trusted Sites listing in a new popup window.
Enter “infoed.org” (do NOT use the normal www in front of infoed.org) in the field provided and click the **Add** button to add it to the list of trusted websites. Your screen refreshes and infoed.org is now considered a trusted site by Internet Explorer.

Once the site has been added, ensure that the checkbox for “Require server verification (https:) for all sites in this zone” is unchecked. Click the **Close** button to register your changes and close the Trusted Sites screen.
1.1.3. IE Advanced

In the Advanced options for IE, we are disabling the default behavior for displayed HTTP error messages. Doing so causes the browser to always display the maximum amount of information about any encountered errors.

Click the "Advanced" tab in the Internet Options menu to open the Advanced screen.

Scroll down the list of settings until you reach "Show friendly HTTP error messages" and uncheck its checkbox. Click the "Apply" button to register your changes.
1.1.4. IE Privacy

Though the InfoEd Global Suite displays and requests information for a user through the use of various popup windows, Internet Explorer’s popup blocker does not normally interfere with the system’s function. However if you have performed all of the previous setups for Internet Explorer and are still having problems with modules not acting as they should, this final configuration may help.

Click the **Privacy** tab in the Internet Options menu to open the Privacy screen.

![Internet Options Privacy Tab](image)

Turn off the popup blocker by unchecking the box next to “Turn on Pop-up Blocker” and then clicking the **Apply** button.

**Note:** turning off the popup blocker could also expose your computer to other annoying popup windows on other internet sites; consequently, we only advocate performing this configuration if nothing else has fixed your browser’s issues with the InfoEd Global Suite.
1.2. Mozilla Firefox

Configuring Mozilla’s Firefox browser for optimal performance with the InfoEd Global Suite primarily takes place with the Options menus. Here we perform a few setups to ensure that the InfoEd Global Suite’s modules function as they should.

To access the Options menu, select **Tools** from the menu ribbon located at the top of the screen.

Once the Tools menu has opened, access the Options by selecting **Options**; the Options menu replaces the opened Tools menu.

Each of these screens in the Options menu contains myriad setups used to tweak Firefox. Of these, we are only interested in three settings:

- **Privacy** – here we will clear the cache (see **1.2.1. Firefox Privacy**).
• **Advanced** – here we will alter the default settings to eliminate Firefox’s cache completely (see 1.2.2. Firefox Advanced).

• **Content** – here we will turn off the popup blocker (see 1.2.3. Firefox Content).

### 1.2.1. Firefox Privacy

In the Firefox Privacy options, we are clearing the existing cache and altering the default setups such that the browser will no longer store cached versions of accessed web pages. While this can slow internet browsing by a small amount, it does ascertain that you will always have the most up to date information entered in every record or configuration to which you navigate in the InfoEd Global Suite.

Click the **Privacy** icon in the Options menu to open the Privacy screen.

The Privacy screen displays the options for overall internet privacy, including how Firefox handles cookies and your browsing history. Click the clear your recent history link to begin; the Clear Recent History screen opens in a new popup window.
Select “Everything” from the Time range to clear pick list, ensure that the checkbox next to Cache is checked, and click the button to clear Firefox’s cache.

1.2.2. Firefox Advanced
With the cache cleared in the previous setup, we now use the Advanced options to alter Firefox’s cache.

Click the icon in the Options menu to open the Advanced screen.
Change the number listed for Offline Storage to 0. By reducing the size of the space used to maintain the browser’s cache to 0 MB, we effectively disable it completely. This guarantees that you will always see the newest version of every screen in the InfoEd Global Suite, rather than a previously stored copy.

1.2.3. Firefox Content

Though the InfoEd Global Suite displays and requests information for a user through the use of various popup windows, Firefox’s popup blocker does not normally interfere with the system’s function. However if you have performed all of the previous setups for Firefox and are still having problems with modules not acting as they should, this final configuration may help.

Click the icon in the Options menu to open the Content screen.

Turn off the popup blocker by unchecking the box next to “Block pop-up windows” and then clicking the button.

**Note:** turning off the popup blocker could also expose your computer to other annoying popup windows on other internet sites; consequently, we only advocate performing this configuration if nothing else has fixed your browser’s issues with the InfoEd Global Suite.
1.3. Safari
Configuring Apple’s Safari browser for optimal performance with the InfoEd Global Suite primarily takes place within the menus accessible from the menu ribbon at the top of the screen. However, one of the menus that we will use is not enabled by default in Safari and will have to be enabled from the Preferences.

To access the Preferences, select>Edit from the menu ribbon located at the top of the screen.

Once the Edit menu has opened, access the Preferences by selecting Preferences; the Preferences menu replaces the opened Edit menu.

The configurations in the multiple screens available in the Preferences control how Safari interacts with web sites as well as your computer. We will only use one of the options located on the Advanced screen.
Click the **Advanced** icon to open the Advanced screen.

Check the checkbox for “Show Develop menu in menu bar;” once checked, the menu appears in your menu ribbon. Close the Preferences by clicking the **X** icon in the top right corner.

With the Develop menu activated, Safari may now be configured quickly with just a few clicks. Begin by opening the Edit menu by selecting **Edit** from the menu ribbon.

Click Empty Cache to empty Safari’s cache of visited websites. Depending on your version of Safari, you may be asked to confirm deletion; if so, confirm the deletion. With the cache emptied, you will be assured that you are seeing the new version of a website and not a cached copy of it.

However the cache will again refill as Safari is used to access websites; so, to prevent having to regularly clear it, we will disable it completely from the Develop menu that we enabled from the Preferences.

Click **Develop** to open the Develop menu.
Scroll down and select **Disable Caches** to keep Safari from recreating its cache. Disabling caching can slow down internet browsing slightly as your browser will always re-download each visited website; however, this also guarantees that you will always have the most recent information entered in every setup and record. Safari is now configured for use with the InfoEd Global Suite.

**Note:** Safari’s popup blocker does not normally interfere with the InfoEd Global Suite’s function. However, if you have performed the setups for Safari and are still having problems with modules not acting as they should, then disabling the popup blocker might fix the problem.

Disable the popup blocker by opening the Edit menu and selecting **Block Pop-up Windows**. The checkmark will disappear.
2. The eRA Portal

This Portal provides the first necessary system security for all of parts of the InfoEd Global Suite by restricting login. In addition to providing security, by serving as the central access point the eRA Portal also offers quick access to SPIN, GENIUS, profile information, and personal links.

Beginning with the main Portal screen, the InfoEd Global eRA Portal gives investigators access to all research items within the system, and also allows for the use of project clustering, organizing the investigator workload. There are five navigation buttons on the left side:

- **Home** — return to the eRA Portal at any time; useful for quickly returning to the main screen from inside any of the other areas available from the portal.

- **Login** — open the login screen, allowing you to access your organization’s version of InfoEd Global; requires a username and password (see 2.1. Login).

- **Get Profile** — obtain a username and password to gain access to your organization’s version of InfoEd Global (see 2.2. Get Profile).

  **Note:** this button may not be present if the Personnel Administrator has chosen to disable it for added system security. If it is disabled, the only way that new users may gain access to the system (or existing users may again request their login information) is by contacting the administrator(s).

- **SPIN** — opens the Sponsored Programs Information Network (SPIN) screen; useful for finding funding opportunities. Search from over 4,000 federal, non-federal, private, non-profit, and international sources. While SPIN access from the eRA Portal does not require a username or a password, it is moderated by IP address range. If access is denied you, you will have to login and use SPIN from inside the system.

  **Note:** please see the SPIN User’s Guide for more information on using this tool.

- **GENIUS** — search through any profile or bio-sketch information made public by any client of InfoEd Global; useful for finding collaborators or experts in a particular field. Just like SPIN access, GENIUS access from the eRA Portal does not require a username or a password and is also moderated by IP address range. If access is denied you, you will have to login and use GENIUS from inside the system.

  **Note:** please see the SPIN User’s Guide for more information on using this tool.
2.1. Login

The procedure for logging into the InfoEd Global Suite through the eRA Portal is basically identical to that used with any other secure website to which you have logged in.

Click the **Login** button to begin the process; your screen refreshes to display the Login screen.

Enter your username and password in the respective fields and click the **Login** button to log into the system. If you do not have username and password, or if you have forgotten them, you can use the Get Profile function to retrieve them (see 2.2. Get Profile).

2.2. Get Profile

This functionality enables a user to request a username and password from the system. The Get Profile function differs slightly based upon whether or not you are an existing system user:

- **Existing users** – most users already using the InfoEd Global Suite will primarily use this function as a way to request their username and password in the event that they have forgotten it (see 2.2.1. Get Profile – Existing User).

- **New users** – users new to the InfoEd Global Suite can use this function to request a username and password (see 2.2.2. Get Profile – New User).

**Note:** the system and password will grant a new user extremely limited access to the system. The user will be able to login to the system, but will not be able to access or even view any modules or existing records until an administrator grants the user security privileges (to enable module access) and workflow privileges (to enable record access).

2.2.1. Get Profile – Existing User

The Get Profile Login screen takes the appearance of an electronic questionnaire; as a user answers a question, the next one appears. Once all four have been answered, the person’s login information will be emailed to the address entered in their profile. If no email address has been entered, a user will have to request their login information directly from an administrator.

Existing users are those users who have already submitted an initial registration form through the Get Profile Login screen or who have already been added to the list of internal personnel by their organization’s Personnel Administrator. Existing users will generally not use this functionality except if they lose or forget their username or password.
Please see 2.2.2. Get Profile – New User if you are a new user who has never accessed the system before for information on requesting login information.

Click the **Get Profile** button to begin the process; your screen refreshes to display the Get Profile Login screen.

Select your state or province from the pick list and click the **Continue** button; the screen refreshes to display the next question.

Select the name of your institution from the pick list and click the **Continue** button; the screen refreshes to display the next question.

Next you are asked to select your profile; click the **Set** button to begin doing so. The Personnel alpha split list opens in a new popup window.
Select the letter of your last name from the letters across the top and scroll through the pick list to highlight your name. The list may also be filtered by position; the Positions list directly corresponds with GENIUS. Or use “Search for a particular entry” to find a specific entry. This will ONLY search through the letter chosen. As each letter is typed into the search field, the pick list will adjust to the first item in the list that matches the entry.

Regardless of which method you use to find your name, highlight it in the pick list and click the button; the popup window closes, refreshing the screen with the final question.

**Note:** if you have logged into the system previously and cannot find your name in the Personnel alpha split list, you will have to contact your administrator for assistance. If you are a new user requesting access, please see 2.2.2. Get Profile – New User for more information.

Based on the answers given to the first three questions, the system displays the identifying information for that profile at the bottom of the screen. After examining that information, you may answer the final question by selecting “yes this is my profile” or “no this is not my profile” from the pick list; one of the following will occur:

- If you select yes, the system will email your username and password to the email address displayed.
• If you select no, your screen will refresh, returning you to the third question and enabling you to again search the Personnel alpha split list for your profile. If you cannot find your profile in the list, please see 2.2.2. Get Profile – New User.

2.2.2. Get Profile – New User
The Get Profile Login screen takes the appearance of an electronic questionnaire; as a user answers a question, the next one appears. Once all four have been answered, the person’s login information will be emailed to the address entered in their profile. If no email address has been entered, a user will have to request their login information directly from an administrator.

New users are those users who have never before accessed the system and are requesting access. Please see 2.2.1. Get Profile – Existing User if you have already accessed the system (or have previously requested access as a new user) and cannot remember your login information.

Click the button to begin the process; your screen refreshes to display the Get Profile Login screen.

Select your state or province from the pick list and click the button; the screen refreshes to display the next question.

Select the name of your institution from the pick list and click the button; the screen refreshes to display the next question.
Check the checkbox next to “Profile Not Found in List.” Your screen refreshes to display the first time registration from.

These fields enable you to enter the minimum information required for creation of your profile; you could later add additional information or edit the existing information in your profile, assuming that the administrator allows users to do so.

Using the available fields, you may specify such information as:

- **Last Name** – given or family name; field limited to a maximum of 25 characters.
- **First Name** – the name by which you are known; field limited to a maximum of 25 characters.
- **Middle Name** – a middle name, if any, is often used to distinguish between people who have identical first or last names; field limited to a maximum of 25 characters.
• **Email Address** – the email address as it will appear in the system; an email address is vital both for contacting you as well as for sending you your login information. Email addresses may be up to eighty (80) characters long, and must be in the following format: “something@anything.atleast_2_characters”

**Note:** without entry of a valid email address, it is not possible to receive or retrieve login information without the aid of an administrator.

• **Primary Department** – used to specify the primary department for which you work. Click the **Set** button to begin the process; the Departments list opens in a new popup window.

![Departments Popup Window](image)

You can locate the department to assign to the person either by navigating the tree diagram to find the desired department or by selecting one of the letters along the top screen to populate the pick list only with the departments beginning with that letter. With the pick list narrowed, you may select a department from the list and click the **locate** button to instantly expand the tree diagram and highlight the selected department.

Regardless of which method you use to find and select a department, checking the radio button next to the department that you wish to assign and clicking the **Select** button will close the popup window and assign that department to the new profile being created.

• **Username** – depending on the choices your institution’s administrator has made concerning the generation of new usernames and passwords, this field may not be displayed:

  o If it IS NOT shown in the registration form, your username will either be assigned by an administrator or randomly generated by the system.

  o If this field IS shown on the registration form, you may enter the username of your choice.

**Note:** the minimum length of usernames is subject to administrator configuration; the maximum length permitted for usernames is 20 alphanumeric characters.

All usernames are case sensitive and may not be the same as your password for security purposes.
• **Password** – depending on the choices your institution’s administrator has made concerning the generation of new usernames and passwords, this field may not be displayed:
  
  o If it IS NOT shown in the registration form, your password will either be assigned by an administrator or randomly generated by the system.
  
  o If this field IS shown on the registration form, you may enter the password of your choice.

  **Note:** the minimum length of passwords is subject to administrator configuration; the maximum length permitted for passwords is 20 alphanumeric characters.

  All passwords are case sensitive and may not be the same as your username for security purposes.

• **Re-Enter Password** – all passwords are case-sensitive; you must reenter them in this field to confirm that it is exactly what you meant to type.

Once you have entered the information to your satisfaction, click the **Continue** button to submit your request. Your screen refreshes to display a confirmation screen.

The confirmation screen displays a summary of information you submitted, although the username and password fields (if displayed) are left blank to help keep your login information secure.

When you create a profile, an Administrator may need to validate your profile before you can begin to receive SMARTS matches or before your profile information can be available in the GENIUS database of investigator profiles. In addition an administrator may configure the system such that, even with a username and password, you may still be unable to login until your profile has first been validated by an administrator.

**Note:** please see your administrator to find out what is necessary to gain access to the system, especially in those systems where the Get Profile function has been disabled.
3. The InfoEd Global Suite

Once accessed through the eRA Portal, the InfoEd Global Suite is further subdivided into two additional interfaces, which are also referred to as portals since they serve as a central area leading off to the various modules of the InfoEd Global Suite such as Proposal Tracking, Research Outputs, Technology Transfer, etc. Both portals house the same functions, with mostly cosmetic differences; these portals are:

- **New Portal** – this portal was designed to be the primary user interface and, as such, most of the modules’ records have migrated to here and are accessible from this main area. It has a different layout and navigation style than the Old Portal and can also be configured by users to better suit their tastes in color and layout. Please see 4. The New Portal for more information on the New Portal and its functions.

- **Old Portal** – also sometimes referred to as the management portal; it primarily functions as the home of the administrative configurations for the InfoEd Global Suite. Most users will actually never access this area since all of the user tools that can be accessed here are also accessible from the New Portal; however, the Technology Transfer (TT) module is still only accessible from here. Please see 5. The Old Portal for more information on the Old Portal and its functions.

4. The New Portal

The portal that you see after you log in is determined by the administrator, as they may configure it so that users see the either portal by default. However, once you have logged in, you will most likely find yourself at the New Portal, as most of the modules are accessible from here exclusively.

This portal’s design includes navigation bars on the top, left, and right of the window with collapsible menus for each module and tool to provide easier navigation as well as to keep the screen from requiring a large amount of vertical scrolling.

When logging into the New Portal, the My Open Action Items screen will be open by default.
Framing this main screen of the New Portal along the top, right, and left sides are several different menus and links leading you elsewhere in the system, enabling you to access different tools and data, including any of the InfoEd Global Suite’s modules licensed by your organization.

**Note:** depending on your organization’s InfoEd Global licensing agreement, your screen may display more or fewer navigation links on the left side; for example, “My Research Outputs” only appears if the Research Outputs module is licensed by your organization.

### 4.1. Left Navigation Menus
The left navigation menus contain links to administrator tools, to common module record-related tasks, to your profile information, to program settings, and to administrative notes posted to the system for all to read. Each section of the left navigation menus will be listed and examined in the following sections. However many of these menus are solely for those modules and are detailed more in those modules’ manuals.

**Note:** some parts of the left navigation menus may not appear on your screen depending on your security settings. In addition, of the parts that you are able to access, some information may not be editable or delete-able as configured by your administrator.

#### 4.1.1. My Projects
Projects are a way for you to create customized sets of records, even if they are not from the same module. These sets would be ideal for following a project completely, for example by linking together the grant proposal, the disclosure made for a technology arising from the grant, the protection filings used to secure the technology’s intellectual rights, the clinical trials in which the technology was tested, the licensing agreements under which others have gained the rights to utilize the technology, etc. By making these records all a single project, data would be shared between the records, greatly reducing data entry and the potential for clerical errors.

**Note:** the Project functionality is under construction and will be fully documented in a future release once it is completed.

This menu can be disabled from the Settings in Profile (see [Settings](#)).

#### 4.1.2. Module Menus
The menus for each module licensed by your organization appear between the My Projects and My Profile menus. Clicking any of these menus expands them fully, displaying the links leading to the module’s tools and records. These menus are detailed fully in the User’s Guide for that respective module.

#### 4.1.3. My Profile
The links in the My Profile section also begin hidden since the menu is collapsed; these links perform actions more directly related with the users, allowing them to edit their profile, view files they are a part of, set funding alerts, and change the appearance of the portal. Each link is detailed separately in the following section.
Edit Profile
As the name implies, profiles are a collection of screens that you can use to log information related to you, such as educational background, current duties, publications, etc. This information can become a searchable part of the GENIUS database, enabling users at other institutions to find you based on your skill sets or abilities; this can greatly facilitate collaboration.

Note: administrators determine how much, if any, profile information entered into the system is publicly searchable.

Users are able to open their profiles to view the information and, in some cases, to edit any of the information entered on any of the screens.

Note: personnel administrators can lock profiles, preventing them from being edited.

Click the Edit link to display your profile, refreshing your screen to display the General detail screen of the profile.

At the top of all profile screens, three common buttons are visible:

- **Institution Contact** – clicking this button opens a new popup window containing the contact information for the institution contact; this information is entered and maintained by the administrator and is not editable here.

- **Full Profile** – clicking this button opens a new popup window containing all the information from your profile so that it can be viewed or printed out in one place. This is also a handy way to check for any data entry errors made without wading through each screen individually.

- **Save** – clicking this button verifies any of the changes made to the entered information and saves the profile.

Profiles consist of multiple screens used to log information related to a single person and his or her abilities and expertise. Each of these screens is examined individually in the sections that follow.

Note: administrators can hide some screens, disable them, lock them, or even make them mandatory; you may not see all of these screens or be able to edit information on some or all of the screens that you do see.
Profile – General Detail

This screen is very large and is designed to contain a great deal of information about the person. In an effort to maximize the screen capture’s legibility, it will be presented in sections.

Note: based on your security privileges, you may not see all of these sections documented for the General Details screen of a profile or even some of the fields.

The first section is named General and primarily is used to capture your contact information.

Included on this screen are fields for the person’s first, middle, and last names, phone number and other contact information, centers, departments, and locations to which the person is assigned, and many other traits.

The available fields on this section of the screen primarily deal with mailing address, contact information, and other general traits used for identification. The fields are fairly straightforward; however, there are five functions onscreen that may not be as readily evident:

- **Image upload** – clicking the 📷 icon opens a new popup window from which you may browse your computer’s hard drive to find an image to attach to your profile.
- **Delete Image** – clicking the ⚪️ icon removes an uploaded image and deletes it from the system.
- **Set ID** – clicking the ✉️ button opens a new popup window in which you may enter or edit an entered employee identification number, if applicable.
- **Change** – clicking the 🏷️ icon unlocks the profile, making its screens editable again.
- **Check In** – clicking the 📅 icon locks the profile, making its screens view only again.
- **History** – clicking the icon opens a new popup window containing your profile’s history; from this screen you can see when your profile was checking in and out and by whom. You may also view the contact information for the people who checked it in and out.

The next section helps track addresses, titles, departments, locations, and centers and programs to which you are associated.

All of these fields are also fairly straightforward. The values in the pick lists and those that can be selected in departments, centers/programs, and locations are all drawn from lists entered and maintained by the administrators.

The next two sections, positions and roles and responsibilities in portal, go hand in hand.

These two sections are view only and display information about the roles and positions assigned to you based on the role assignments and assigned security privileges granted you by the administrators.

The final section is named Security.
This section displays your username. If the administrators have allowed it, you may also click the button to open a new popup window in which you could alter your username.

**Note:** my username is blanked out in the screen capture to protect our system’s security. Your screen will display your username.

**Profile – Electronic Signature**
As implied by its name, the Electronic Signature screen is used to create and manage an electronic signature for a user. This signature is intended for use during the routing and review processes, enabling reviewers to sign off on their approval of a record or its review.

**Note:** functionality for the electronic signature has not yet been finalized. We are working with our client base to determine the best and most useful method to utilize these signatures and how records should behave once signed electronically.

Clicking **Electronic Signature** opens the signature manager screen in a new popup window.

On this screen you may see a history of all documents signed with this signature as well as create a new signature by clicking the button; your screen refreshes to display the Electronic Signature Management screen.
Using the available fields, you may create the electronic signature by entering the name that will appear when the signature is used and a password used to confirm the signature’s use.

**Note:** this screen and its available fields will likely change as the functionality for electronic signatures is finalized.

**Profile – Advisees**

As its name implies, this screen is designed for the tracking and managing of a list of people for whom you serve an advisory role of some sort.

Separate entries may be created for each advisory relationship by clicking the **Add New** button; each entry may include names, advisory level, and start and end dates for the relationship.
Profile – Appointments

This profile screen is only displayed in organizations who have licensed the Conflict of Interest (COI) module of the InfoEd Global Suite. You may use it create separate time periods for each conflict disclosure filled out, populating each time period with any positions to which you were appointed during that period.

When a position is created, you are then able to specify a salary, hours spent performing the duties for that appointment, and other details related to the position. These details are part of the information the COI module uses to detect possible conflicts based on research activities, module records in which you are listed, and other system data.
Profile – Backups

As indicated by its name, this screen enables the entry of your backups. Backups are often configured in many organizations in case of illnesses or other absences, enabling business to continue while people are out of the office for whatever reason.

Each added backup can be sequenced by entering numbers in the sequence boxes or removed by clicking the appropriate icon.

**Note:** these listed backups cannot access the person’s records or sign or approve things in the person’s stead unless specifically granted that delegation right. Please see your administrator or the Enterprise Administration manual for more information on delegation and its assignment.
Profile – Biosketch

This section is designed to aid in the management of your biosketches by providing a central area for their listing and storage.

These biosketches may be maintained either by uploading a custom file or by downloading one of the templates created by an administrator, filling it out, and re-uploading it. Any existing biosketches uploaded here may also be edited as necessary.
Profile – Certifications

This screen lists any certifications assigned to you in any of the modules of the InfoEd Global Suite. Certifications can be created by the administrator to represent tangible certifications (such as a commercial driver’s license) or as a way to track specialized information (such as having taken a class in working in a specific software environment).

These certifications may be opened for viewing, but none of the information can be edited here, regardless of any administrative privileges that you may have. All certifications can only be edited in the module in which they were created and assigned.
Profile – Classification Codes
This section of the profile enables the assignment of classification codes to categorize your work, research, area of expertise, etc. These classification codes are created and managed by the administrator, making it much easier to craft a system that works best for the individual organization.

Note: depending on administrator configuration, there may be multiple classification categories, each of which could contain classifications. Please see your administrator if you have any questions about the created categories or classification codes.

Clicking the Add button opens a new popup window containing the codes created by the administrator, enabling you to browse and select applicable ones.

Once any code has been added, the Remove button appears; you may check the checkbox for any added code and click this button to remove that code from your profile.
Profile – Collaborators
On the Collaborators screen you may create separate entries for the people with whom you have collaborated.

Clicking the **Add New** button opens a new popup window in which you can create a new collaboration entry. Each entry may include the collaborator’s name, the organization for which that person works, and the type of collaboration.

Once an entry has been added, you may click the **Edit** icon to open it for editing or check its checkbox and click the **Delete** button to permanently delete that entry.

Profile – Courses Taught
Courses Taught enables the creation of separate entries for each course that you have taught during your career.
Clicking the **Add New** button opens a new popup window in which you can create a new course entry. Each entry may include the year, reference number, title, and a description.

Once an entry has been added, you may click the edit icon to open it for editing or check its checkbox and click the delete button to permanently delete that entry.

**Profile – Creative Activities**

Creative Activities enables the creation of separate entries to log and track the creative activities you have undertaken.

Clicking the **Add New** button opens a new popup window in which you can create a new course entry. Each entry may include the year in which the activity took place, a title for the activity, the name of the institution or organization where the activity took place or for whom the activity was undertaken, a location where the activity took place, and an abstract summarizing the activity and its purpose.

Once an entry has been added, you may click the edit icon to open it for editing or check its checkbox and click the delete button to permanently delete that entry.

**Profile – Custom Category**

This profile section is unique, as it contains custom categories created for the entry and tracking of information that is not part of a profile by default; these help enhance the data capture of a profile to include information required by the organization. Custom Category can be very large, depending on the number of custom categories created by the administrator.
Each of these listings represents one of the categories created and configured by the administrators in the Institution Custom Fields setup; each listing also displays how many entries were made using the custom fields.

**Note:** not all organizations will have need of custom profile fields.

Clicking on the icon or on the category name refreshes the screen to display the detail screen for that category.

On this screen you can edit or delete any existing entries or click the button to add new ones. Each added entry consists of all the fields configured for that custom field category, up to 25 fields at maximum.

### Profile – Delegates

**Note:** this screen can be disabled completely by an administrator.

This screen enables the assignment of internal personnel to act on your behalf. Depending on how your organization handles delegation, delegates can be assigned a variety of privileges to the records of the person for whom they serve as a delegate.

The access privileges for each delegate may be set using these fields.

Assignable privileges include the type of access granted to your records assigned to the delegate, whether or not the delegate has the authority to sign or approve items for you, and the sort of access granted to your calendar.

**Note:** the assignable privileges may be altered by the administrator configurations; for example, administrators may forbid users from assigning signing authority to their delegates.
At the bottom of the screen are listed any people who serve as delegates for you and the types of access that they have been granted, as well as the names of any people for whom you serve as a delegate.

**Profile – Education**

The Education screen enables you to create a separate entry to log each part of your educational background.

Your educational background may be transcribed using separate entries for each degree conferred.

Clicking the **Add New** button opens a new popup window in which you can create a new education entry. Each entry can contain information such as degree earned, field of study, location, year conferred, etc. In addition to the created entries, a user may specify a degree to be reported as their degree when applying for funding through Grants.gov by selecting the corresponding radio button for one of the degrees entered.

**Note:** only one degree may be specified for Grants.gov; selecting a different degree replaces the previous selection.

Once an entry has been added, you may click the **Edit** icon to open it for editing or check its checkbox and click the **Delete** button to permanently delete that entry.
Profile – Employment
The Employment screen enables the logging of your employment history.

Clicking the **Add New** button opens a new popup window in which you can create a new employment entry. Each employment entry may include start and end dates, position name, title, employer, description, and a checkbox for indicating which employment entry represents the current employer.

Once an entry has been added, you may click the **Edit** icon to open it for editing or check its checkbox and click the **Delete** button to permanently delete that entry.

Profile – Honors & Awards
The Honors & Awards screen enables the logging of any awards granted to you.

Clicking the **Add New** button opens a new popup window in which you can create a new honor/award entry. Each entry may contain the period for which the honor or award is applicable, its name, and a reason for its award.

Once an entry has been added, you may click the **Edit** icon to open it for editing or check its checkbox and click the **Delete** button to permanently delete that entry.
Profile – Languages
This screen enables the creation of separate entries for each language with which you are proficient.

Clicking the **Add New** button opens a new popup window in which you can create a new language entry. In these entries you are able to select your proficiency in reading, writing, and speaking the language from a pick list populated with values drawn from values entered in the Codes and Tables by the administrators.

Once an entry has been added, you may click the **Edit/View** icon to open it for editing or check its checkbox and click the **Delete** button to permanently delete that entry.

Profile – MD Information
The MD Information screen enables the logging of various numbers such as the Provider ID, Medicare and Medicaid ID, Federal ID, etc. Not all users will be able to enter information here.

This information is not used or imported to any other part of the system. Logging it is primarily a matter of convenience, ensuring that you have all of this information in one place for when you need it.
Profile – Memberships
The Memberships screen can be used to log separate entries containing the related details of any committees upon which you serve.

Clicking the **Add New** button opens a new popup window in which you can create a new membership entry. Each entry may include the name and period of the committee, start and end dates, function, description of the committee or its activities, and a checkbox to indicate if this membership is current.

Once an entry has been added, you may click the **Edit** icon to open it for editing or check its checkbox and click the **Delete** button to permanently delete that entry.

Profile – Other Information
This screen contains fields in which you may specify some personal information that often is imported into module records, such as proposals, when the person is assigned to them.

These details include such data as gender, ethnicity, race, and disabilities.
Profile – Patents
The Patents screen enables the creation of separate entries for each patent issued to you. Clicking the **Add New** button opens a new popup window in which you can create a new patent entry. Each entry may include the patent’s number, title, granting country, an abstract, and the date upon which the patent was awarded.

Once an entry has been added, you may click the **Edit** icon to open it for editing or check its checkbox and click the **Delete** button to permanently delete that entry.

Profile – Portal Preferences
This screen enables the configuration of the portal’s behavior. The many available options include such traits as whether or not an email is sent to the person when they are assigned a record or task or which types of locations/resources, contacts, and sponsors are available when the person browses for them.
Profile – Professional Associations and Societies
This screen enables the creation of separate entries for each professional society or association to which you belong.

Clicking the **Add New** button opens a new popup window in which you can create a new association entry. Each entry may include the name of the association, start and end dates, and a description of its function.

Once an entry has been added, you may click the **Edit / View** icon to open it for editing or check its checkbox and click the **Delete** button to permanently delete that entry.

Profile – Professional Licenses and Certifications
The Professional Licenses and Certifications screen enables the creation of separate entries for each professional license or certification that the person has earned.

Clicking the **Add New** button opens a new popup window in which you can create a new entry. Each entry may include the name of the license, certifying institution, start and end dates, and a description of the license or certification.
Once an entry has been added, you may click the **edit** icon to open it for editing or check its checkbox and click the **delete** button to permanently delete that entry.

**Profile – Publications**
The Publications screen enables you to log the bibliographic details of any items that you have published.

In addition to the standard fields used for tracking bibliographic information, you may also upload this information to the Research Outputs (RO) module if your organization licenses it.

**Profile – Resources**
As implied by its name, this screen enables you to log any resources available for their use.

Using the fields available on this screen, it is easy to account for any resources available to you such as laboratories, computers, clinics, offices, and other equipment and facilities.
Profile – Research Interests
The Research Interests screen enables the creation of separate entries for any research in which you are specifically interested.

Clicking the **Add New** button opens a new popup window in which you can create a new entry. Each entry may include the year, title, location, and a description of the interest. Not all of these fields will be applicable to each interest.

Once an entry has been added, you may click the **Edit/View** icon to open it for editing or check its checkbox and click the **Delete** button to permanently delete that entry.

Profile – Reviewed Works
The Reviewed Works screen enables the creation of separate entries for any works reviewed by you or for any works that you have helped review.

Clicking the **Add New** button opens a new popup window in which you can create a new entry. Each entry may include the year, title, authors, references, and an abstract of the work.

Once an entry has been added, you may click the **Edit/View** icon to open it for editing or check its checkbox and click the **Delete** button to permanently delete that entry.
Profile – Sponsor Credentials
This screen enables the creation of separate entries for the logging of any sponsor-related credentials that you may have. These credentials are used when applying for funding, often for purposes of identification or for access to specific systems for example.

Clicking the **Add New** button opens a new popup window in which you can create a new entry. Each entry may include the name of the credential, its type, and sponsor.

Once an entry has been added, you may click the **Edit / View** icon to open it for editing or check its checkbox and click the **Delete** button to permanently delete that entry.

Profile – Sponsored Funding
The Sponsored Funding screen enables the creation of separate entries for the logging of any funding that has been awarded to you.

Clicking the **Add New** button opens a new popup window in which you can create a new entry. Each entry may include a project number, PI, source, project title, major goals, approval dates, proposed costs, grant status, effort percentage for the person, and other related details used to identify and describe the funding.

Once an entry has been added, you may click the **Edit / View** icon to open it for editing or check its checkbox and click the **Delete** button to permanently delete that entry.
Related Objects
This function displays a visual representation of all records in the system with which you are involved, regardless of module.

Clicking the Related Objects link opens the relationship explorer in a new popup window.

Since this relationship explorer is for you, your name appears in the central box. Surrounding it are boxes representing all the modules licensed by your organization. Within each box are listed the record numbers and statuses of each record with which you are associated in that module.

Clicking on any hyperlinked record number opens that record in a new popup window, from which you may work in that record; regardless if you access a record from this diagram or from within the module itself, the actions that you may undertake in the record are based on the workflow privileges granted you for that module.

You may also click on the icon to open the relationship explorer for that particular record. This diagram is very similar to your own relationship explorer, except that the record is in the central point, which enables the display of all items and people related to that record.
**SMARTS**

The SMARTS preferences enable you to adjust how you receive these notifications, as well as how they are selected.

Clicking the SMARTS link refreshes your screen to display the SMARTS Preferences.

Using the Preference screen and the other screens now accessible by the onscreen links, Keywords, Applicant Types, Award Types, Geographical Restrictions, Sponsor Types, and Locations Tenable, you can fully configure how the system determines which opportunities it should send to your email and how those messages will appear.

**Note:** please see the SPINPlus User’s Guide (accessible by clicking the Help link on the SPIN screen) for more information on configuring these setups.
Settings
These settings alter the appearance of the New Portal screen and enable you to turn some menus on and off.

The configurable options are fairly straightforward:

- **Portal Login** – select which portal you will see after you login to the system; you will not be able to alter this option if the administrators have removed your access to the Old Portal.

- **Results Per Page** – select the number of results you would like to see onscreen in any lists. This option affects such items as messages, action items, module records, etc.

- **Sort Action Items** – select the order in which you would like to see your action items displayed. This will determine whether newer action items appear at the top or at the bottom of your action items list.

- **Web Portal Tabs** – determine which menus and tools no longer appear onscreen for you by unchecking the checkboxes for any unwanted items. You may see more or fewer available menus based on how many and which modules your organization licenses.

- **Color Schemes** – select a color scheme for your portal screen by checking the desired radio button.
Click the **Save** button to register any changes made; your screen refreshes to reflect the configurations selected.

### 4.1.4. Administrative Notes

This menu only appears when there is an admin note posted to the module; clicking on the note will display more information about that note, as well as information about when it was posted and by whom.

These notes can be either black or red, based on the importance the administrator assigned when creating them; red notes are those considered high priority. You may click on an administrative note to open a popup window that will show more in depth information and often additional instructions entered by the administrator when the note was created.

These notes are enabled and configured by Organizational administrators; more information about configuring and enabling these notes may be found in the Enterprise Administration manual.

### 4.1.5. Administration

If you have admin privileges to any of the InfoEd Global Suite’s modules, this menu will appear. Like the other menus, it begins collapsed and clicking on it expands it to reveal any links that it contains. Clicking on one of those links refreshes your screen to the Old Portal, displaying the selected administrative area. These administrative areas are divided into two basic categories:

- **Enterprise** – Enterprise consists of Organizational Admin, Personnel Admin, Security Admin, and Sponsor Admin. These administration areas are the figurative backbone of the InfoEd Global Suite, enabling the customization and maintenance of such system items as the personnel list, time zone, list of sponsors, user security, and other background system functions that affect all modules within the system. Please see the Enterprise Administration manual for more information on these configurations.

- **Module** – these administration areas enable the customization and maintenance of each individual module that your organization has licensed. Such traits as numbering system, module pick lists, and forms and form sets can be configured for that particular module. NO configurations made in module administration areas can affect any other module or part of the system. Please see the administration manual for the module (Proposal Tracking, Research Outputs, etc.) for more information on its configurations.

### 4.2. Top Navigation Menu

The navigation menu located across the top of the screen contains links leading to various search functions; they enable users to search for funding or experts, as well as logout and access the help files and admin setups in the Old Portal. It consists of two parts, the stationary tool bar and the SPIN links. From left to right, these links are:

- **Exit** – clicking the Exit icon will log you out of the system.
• 🎯 – clicking the Help icon will take you to the online User’s Manual for the RO module.

• 📚 – clicking the Portal icon will take you to the Old Portal, where you can access your messages and profile, view your calendar, find funding, and access the admin setups for the module (if you have the proper security privileges). Most users will never need to visit the Old Portal since all of those tasks can also be performed from this main New Portal screen; and, as such, this icon may be disabled by the system admin.

• 📞 Support – clicking this icon opens a new popup window containing the support website. By default this link leads to www.infoed.org, but the administrator can configure it to lead to any other website or disable the icon, and its link, completely.

• 💸 Find Funding – clicking this icon opens a new popup window containing SPIN, where you can search for funding opportunities.

• 🚀 CV Database – clicking this icon refreshes the screen to the CV Search Criteria screen, where you can search through the curriculum vitae database by keyword, institution, country, research, etc. to find people with particular knowledge.

• Administrative Note – if an admin has posted an administrative note that they designated high priority, it will be printed in bold red text and scroll in a box that appears to the right of these icons.

4.3. Right Navigation Menus
The right navigation menus, most of which can be disabled by the user, contain links to action items, to workflow maps, to your messages, and to your contacts. Each section of the right navigation menus will be examined from top to bottom in the following sections.

4.3.1. My Calendar
Unlike the other menus, the My Calendar menu is always open (unless disabled in the Settings in the My Profile menu). The calendar can be used to schedule deadlines, meetings, due dates, and many other tasks.

This menu can be disabled from the Settings in Profile (see Settings).
After logging into InfoEd Global, the New Portal screen displays the My Calendar on the right side. The Calendar shows the current month with today's date highlighted in yellow. If there are any events scheduled, the day will be shown with a grey background (unless changed in the calendar options). If you select a day to look at, the day will show on the calendar in boldface type.

To scroll to the next or previous month, click on the for the previous month and the for the next month.

You can go to any month and year to view by setting the month and year in the drop down list under the Calendar. The Calendar will refresh to the chosen month and year.

To view Calendar details, you can choose to look at a 7-day period or a 1-day period. If you choose 1-day, you can choose to show the following increments of time: 1 hour, 30 minutes or 15 minutes.

The following is an example of a 7-day period. You can scroll to past or future 7-day periods by clicking on the left or right arrow next to the period being displayed. You can print the calendar for this period by clicking on the printer icon.
You cannot create calendar events from the 7-day calendar view, but you can view, edit or print the information.
Creating and Editing a Calendar Event

To create a new calendar event, select the day on My Calendar and choose 1-day and chose the increment of time that you want to view events on the calendar: 1 hour, 30 minutes, or 15 minutes.

Click on a time in the day. This will open the Calendar Event popup window.

You can then enter the following information about the event:

**Description:** The text you enter in this field will appear on your calendar. The Description text field appears for all event types. Note that the default description for Event Type “Blackout” is “Unavailable”.

**Start Date:** This shows the date you selected for the event, but can be edited.
Start Time: This shows the time you selected for the event, but can be edited.

Duration: Select the duration of the event in 15 minute increments.

Event Type: Use the pick list to choose an Event Type. There are five different event types users may choose from when creating a calendar event:
- Administrative Note: Allows users to set a basic reminder on their own (or another user’s) calendar.
- Appointment: Appointments allow users to choose personnel and locations for reservation on a calendar.
- Black Out: Allows users to choose all customizable fields available for appointments. The Event Type in this case signifies that certain users and locations are unavailable for the time selected.
- New Patient Visit: Allows users to choose all customizable fields available for appointments. The Event Type in this case signifies that certain users and locations are unavailable for the time selected.
- Personal Event: Allows users to choose all customizable fields available for appointments. The Event Type in this case signifies that certain users and locations are unavailable for the time selected.

Note: Appointments, Black Outs, New Patient Visits, and Personal Events will display on the calendar according to the time set for the event. Administrative Notes will display at the bottom of the screen for the date entered. Not all event types will be available. The variety of event types to which users have access is dependent upon which InfoEd Global modules your institution uses, and the security rights of the individual user.

Background Color: Allows users to select the display color for an event as it will appear in calendar view.

Priority: Users choose from either “Normal” or “High” by selection with the pull down pick list. Selecting “High” priority for an event will flag an event as such as it appears on the calendar with a ! sign. The default Priority is Normal.

Event Description: Detail information about the event can be entered here.

When you are done entering information in the popup, click Save. The screen will refresh and a message will indicate that the Calendar event is saved. The screen now gives you the option of adding locations and persons to the event.
**Location**: To add a location to the event, click on the plus sign +. This will open a popup with the Locations picklist.

If you want to close the popup without choosing a location, click Close. You can select a location by clicking the radio button for that location, click Select. The Calendar Event screen will refresh with the location added. To remove a location, click the Remove icon next to the location name.

**Assigned To**: The event is automatically assigned to the user. To add other persons to the event, click on the link Add. This will open a popup with the Personnel picklist.
If you want to close the popup without choosing a person, click Close. You can select a person by locating the name either clicking on the alpha that corresponds to the first letter of the last name or by doing a search. Once you have clicked on the person’s name in the drop down list, click Select. The Calendar Event screen will refresh with the person added. The event will be added to the person’s Calendar. To remove a person, click the Remove icon next to the person’s name.

Email an invite to assigned user(s). Selecting the checkbox will send the “invite” email upon saving this page.

When you are done entering information in the popup, click Save and then Close.  
**Note:** The following is an example of the email that is sent to an assigned user:

![Example email](image)

Once you have closed the event, the Calendar will refresh to show the event.
To view the Event Description or to edit or delete the event, click on the description. This will open the Calendar Event. To delete the event, click Delete. To edit, make changes, click Save and then Close. To close the event without making changes, click Close.

**Compliance Notes**

Compliance Notes are shown on the Calendar (located at the bottom of the day’s schedule) for those institutions that are currently using InfoEd Global’s Compliance modules (Human Subjects, Lab Animals, and Environmental Health & Safety).

The Compliance Notes field links the user to protocols that were submitted for a given day. Compliance Notes are pink at the bottom of each individual day field.

The name of the module and the number of items submitted that day will appear in the hyperlink. Click the desired hyperlink to view the item details.

This will activate the Compliance Notes Detail popup (below).
The following information is shown:

- **Number**: The Institution Number of the submission.
- **Title**: The Title of the protocol.
- **PI**: The Principal Investigator of the protocol.
- **Department**: The PI’s Department.
- **Primary Sponsor**: The Primary Sponsor of the protocol.

In addition to the above fields, the option to **Edit** and/or **View** the protocol in the development or management module may appear. A user’s security is set by the Administrator and will determine the user’s access.

**Tasks**

The bottom section of the Calendar also shows Tasks Due Today. The link here is to the Task as a Calendar event and can be edited in the Calendar the same as other Calendar events. This does not affect the Task itself, only how it is viewed on the Calendar.

The Task detail will be in Messages>Tasks and can be accessed by clicking on the Open icon.
4.3.2. My Action Items
This menu can be disabled from the Settings in Profile (see Settings).

Action Items refers to items that are awaiting the user’s review and/or approval, for example, protocols or proposals. Generally when the user logs into InfoEd Global and into the New Portal, My Action Items that have an Open status will be shown.

My Action Items appears under My Calendar on the right side of the screen and is always visible. Clicking on My Action Items opens the box to give the option to see Open or Completed action items.

Action Items come from other InfoEd Global modules and are not created or edited in the New Portal, with the exception of approving or disapproving an item which would move it from the Open Action Items to Completed Action Items.

Open – clicking the Open link refreshes the screen to the My Action Items screen, which displays all open action items assigned to you.
Action Items display:

- **Open** – clicking the icon opens the Action Item
- **Assigned/Due** – this column displays summary information about the Action Item, including:
  - when the items were assigned
  - when the items are due (assuming that a deadline has been set up in Workflow Status Deadlines)
  - how many open action items there are currently for this user in that module
  - By default, the title, if any, will appear at the bottom of this column. However, some modules will overwrite the title with the name of the assigned primary sponsor, if any
- **Item** – this column displays the Institution Number for the record to which this Action Item is related
- **PI Name** – this column displays the name of the PI assigned to this record
- **Type** – in some modules where reviews are created, it is beneficial to know the type of review selected, such as “Board Review,” when those are specified they will appear here
- **Outstanding Reviews** – the number of outstanding reviews, if any
- **Action Required** – what action is required, if any

Clicking on the icon in any of these action items opens a popup window containing the item requiring action.
Action items vary in appearance depending on the module in which they were created and in function based on how they were configured by the workflow administrators. But they normally display at least some of the following:

- **Item Name** – this appears at the top left of the popup window and identifies the module record to which this action item applies
- **Instructions** – if any specific instructions were associated with the action item, they will be displayed here. Instructions are not mandatory and will only appear if an administrator has configured them.
- **Action Item information** – this table contains background information about the record for which an action is required. The information presented here varies greatly by module, but normally includes such details as:
  - **System** – the module in which the action item was generated
  - **Item** – the type of record in which your action is requested
  - **Action Item Operating Status** – the status of the action item at this point in the Workflow
  - **Number** – the Institution Number of the record in which your action is required
  - **Submitted By** – the name of the person who submitted the item to workflow
  - **Open** – clicking the 📝 icon opens the record (proposal, protocol, etc.) in a new popup window, allowing you to peruse and review it
- **Your Action/Decision** – once an item has been reviewed, you can set your action/decision:
- **Next Status** – you may choose an appropriate status from the pick list based on your decision; however, this list may not be editable if the workflow administrator has configured it as such.

- **Assign to** – if enabled by the workflow administrator, you may choose the next person to send the action item to once you have completed your review. However, some administrators choose to configure the path taken by action items and will disable your ability to select the next assigned person.

- **Comments** – if you have any comments, they can be entered here.

- **Assignment History** – this a table showing the activity on this Action Item, including Assigned date and time, and if completed, the Completed date and time; Duration; Action; Who completed the action; and Comments.

To close the Action Item without saving, click the **Close** button. To complete the action item, follow the Instructions, select the Next Status, Assign To the next person (if not automatically assigned), add Comments if applicable, and then click **I am Done** at the top. This will complete the Action Item for you and move the item to your Completed list.

**DON'T FORGET TO MENTION I AM DONE**

If you want someone else to see this item, you can click on **Forward**. You will be able to add one or more persons to the assignment list for this Action Item.

Locate a person by clicking on the letter that corresponds to the first letter of their last name, then use the drop down list to locate the person. After locating the person, click **Select**. This will add the person to the Assignments for the item and it will add the item to the person's Action Item list. The person will not be added as part of the Workflow previously set up for the item so they will not need to select a Next Status, but they will be able to view the item.

**Completed** – clicking the Completed link under My Action Items refreshes the screen to the My Action Items screen and displays action items that you have completed.
4.3.3. My Workflow Maps

You may access any workflow maps created in the system by any administrator in this area; like most of the New Portal menus, this menu can be disabled from the Settings in Profile (see Settings). Workflow maps are visual representations of the lifecycle of a particular process, such the path that a record takes after it has been modified.

The maps are displayed in a list when you click My Workflow Maps to expand the menu fully.

Click the icon to open that workflow map in a new popup window, allowing you to view the map and/or print it out.
Workflow maps cannot be created, edited or deleted from here. They are created and managed by administrators with access to Workflow Administration. Please see the Admin Tools Manual for more information on creating and working with Workflow Maps.

Many workflow maps are simply images, but administrators may also create workflow maps in which specific information, such as statuses, are linked to individual cells. These cells have clickable hyperlinks that enable users to see a list of all records to which they have access that meet that specific criterion; clicking that link opens a new popup window that displays summary information about these records.
From this screen you can view the people assigned to the record, as well as open the record itself. Your access to the record (i.e. view, edit, delete) are determined by your assigned workflow privileges.

### 4.3.4. My Messages

From this menu, you can access the messaging portal to send and read messages. Throughout the project lifecycle, the InfoEd Global Suite’s Messaging Center enables communication between various users. These project-oriented messages link to items within the InfoEd Global Suite and allow Investigators and Administrators to efficiently manage project communications as well as track and respond to project-oriented requests.

This menu can be disabled from the Settings in Profile (see Settings).

Clicking **My Messages** expands the menu fully, displaying the messaging portal’s links.

The My Messages menu functions identically to most any of the email program interfaces to which you are used to, with separate folders for the various categories of messages and another link from which you may access messaging preferences. Clicking on any folder refreshes your screen, displaying all messages of that category.

Once a folder is opened, any messages (or tasks) of that category can then be opened for reading, forwarded, deleted, replied to, saved, etc.
Messaging Preferences
The Messaging Preferences enable you to decide how the messaging portal behaves, as well as setup a few options that could be useful from a courtesy or a workflow standpoint.

Access the Messaging Preferences by selecting Preferences from the My Messages menu; your screen refreshes to display the Message Preferences screen.

From the Message Preferences window, users may tweak a few options:

- **Configure an email signature** – by checking the Activate My Signature checkbox and entering the desired text, you may enable that text as a signature on any messages that you send.
  
  As you type your text, you will see a preview of your signature in the box on the right. Once you are satisfied, click the **Save** button to register your changes.

- **Configure an autoreply** – by checking the Send Auto-Reply Message to all incoming messages and entering the desired text, you may enable that text as an automated response to any incoming messages.
These are ideal for when you are going to be out of the office for any significant period of time. Once you are satisfied with your message, click the button to register your changes.

- **Configure a message format** – this pick list contains three possible formats for messages that you receive from which you can choose:
  - **Multipart** – this format of message contains two versions of the same message, one as plain text and the other as HTML.
  - **Plain Text** – this format of message only contains text; no pictures or hyperlinks are transferred in this type of message.
  - **HTML** – this format of message may contain text, pictures, and hyperlinks.

- **BCC all outbound** – you may BCC (blind carbon copy) a person on ALL outgoing messages by using this configuration; click the icon to open the Personnel Alpha split list in a new popup window.

  Select the letter of the person’s last name from the letters across the top and scroll through the pick list to highlight the person’s name. Or use “Search for a particular entry” to find a specific entry. This will ONLY search through the letter chosen. As each letter is typed into the search field, the pick list will adjust to the first item in the list that matches the entry. The list may also be filtered by position; the Positions list directly corresponds with GENIUS.

Regardless of which method is used to find the person, highlight his or her name in the pick list and click the [Select] button; the window closes, refreshing the BCC all outbound field with the name of the person selected.

Once a person has been added, you may cancel adding them as the BCC on all outgoing messages by clicking the [ ] icon to remove their name.

- **Forward all** – all internal messages may be forwarded to someone by using this configuration. Click the [ ] icon to open the Personnel Alpha split list in a new popup window.
Select the letter of the person’s last name from the letters across the top and scroll through the pick list to highlight the person’s name. Or use “Search for a particular entry” to find a specific entry. This will ONLY search through the letter chosen. As each letter is typed into the search field, the pick list will adjust to the first item in the list that matches the entry. The list may also be filtered by position; the Positions list directly corresponds with GENIUS.

Regardless of which method is used to find the person, highlight his or her name in the pick list and click the [Select] button; the window closes, refreshing the Forward All field with the name of the person selected.

Once a person has been added, you may cancel forwarding messages to them by clicking the icon to remove their name.

4.3.5. My Contacts
The My Contacts menu grants access to the Contact Portal, enabling a user to perform many tasks that are related to maintaining and logging contacts; in addition, users with administrative privileges may also configure contact portal security. Contact portal security controls how users may use the contact portal and which privileges they are allowed in it. This menu can be disabled from the Settings in Profile (see Settings).

Note: only users granted access to the Contact Portal in their security matrix will see this menu.

Clicking My Contacts expands the menu fully, displaying the links to which you have access.

Each of these three links leads to a different function and are covered separately:

- **Search** – clicking this link refreshes your screen to display the search function
- **Add New** – clicking this link begins the process of creating a new entry in the Contact Portal.
- **Contact Portal Security** – only visible to users who have been assigned Contact Portal Administrator credentials, this link enables the user to configure how the Contact Portal can be used by the people who can access it.
Search
You may build queries to search the Contact Portal based on traits such as entity name, phone number, email, etc.

Clicking Search refreshes your screen to display the search function.

To build a query, select a trait to search by selecting it from the pick list and then enter your search text in the field to its right. Partial items are accepted, so if you only know a part of the contact’s name, for example, you may still search based on what you know. Once your query is configured, click the Search button to view the results.

From your results, you can click the icon to open that contact’s information or you can try a different type of query if you didn’t get the expected results.

Add New
In the Contact Portal, you can add any contacts related to this record. This is useful not only because their information is harder to lose when entered into the system, but also because, once entered, you can send messages to these contacts from within the InfoEd Global Suite (in the messaging portal) or from within any module record (from the Communications section) with which they are associated.

Depending on your security privileges, any additions (contacts, sponsors, and external entities) made in the Contacts section will function as follows:

- If you have not been assigned “on the fly” profile access, your entry will be a temporary one. This means that you can’t report using this entry, can’t use the browse search to find
any records using this entry, and that anyone else wanting to use this entry in their record
will have to add it again because the entry is not a permanent part of the database yet.

- If you have been assigned “on the fly” profile access, the entry will become a permanent
entry and will be able to be used just like any other entry. The system will also display
and flag any temporary additions for you, allowing you to view the entry and decide
whether to make it permanent or, if there are multiple ones of the same name, to make
one permanent and collapse the others into that one.

Click the Add New link to begin the process of adding a new contact; your screen refreshes
to display the Add Contact screen.

At this screen, your path diverges based on the type of contact entry you wish to add:

- **New Sponsor** – originally this was only available to sponsor administrators, but, through
  the Contact Portal, some users may now create new sponsors that may then be
  associated with people and module records (see **New Sponsor**).

- **New External Entity** – these are similar to sponsors in that they are external
  associations, but differ in that they do not offer funding or have never sponsored any
  research with which a member of your organization is associated (see **New External
  Entity**).

- **New External Contact** – as the category name implies, these are any contacts that are
  not a part of your organization (see **New External Contact**).

- **New Internal Contact** – these are contacts within your organization; ordinarily personnel
  administrators add new people to the organization’s list of personnel, but the Contact
  Portal does allow some users to perform this function as well (see **New Internal
  Contact**).

**New Sponsor**
Sponsors are external entities who are currently sponsoring, or who have sponsored in the past,
any research product with which any member of your organization is associated.
Selecting Create New Sponsor and clicking the **Continue** button begins the process of creating a new sponsor.

Click the **Close** button to cancel sponsor creation and close the popup window.

Or enter as much information as you possibly can to make a useful sponsor record and click the **Save** button to create the new sponsor. You may then close the popup window; your screen refreshes as the system saves the new entry.

**New External Entity**

As implied by its name, an external entity is one that you do business with but that is outside of your organization, be they a materials supplier, staffing firm, other research organization, etc. These are NOT sponsors, even though, by their definition, sponsors are external entities.

Selecting Create New External Entity and clicking the **Continue** button begins the process of creating a new external entity.

Click the **Close** button to cancel sponsor creation and close the popup window.
Or enter as much information as you possibly can to make a useful entity record and click the **Save** button to create the new entity. You may then close the popup window; your screen refreshes as the system saves the new entry.

**New External Contact**

External contacts are any people with whom you interact that are not a part of your organization.

Selecting Create New External Contact and clicking the **Continue** button begins the process of creating a new external contact.

The only field on this screen that MUST be entered to successfully create a contact is the entity/sponsor field; but, the more information that you can add to the entry, the more useful that it would be. In particular, without adding an email address, you can’t email this person from within the system; and of course, without a name, finding this contact or differentiating it from the others would be next to impossible as well.

Update the Entity/Sponsor field by clicking **Set**; this will open an alpha split list from which you can search for and find the desired entity/sponsor to assign to this new contact.
Clicking the **Close** button will cancel the assignment of the entity/sponsor and close the popup window.

Search for the entity/sponsor using the letters at the top; if desired you can use the Filter By function to narrow the list to sponsors only or entities only. Select the desired entity or sponsor and click the **Select** button to add it to the profile that you are creating. Once added, the popup window closes and your screen refreshes with the selected entity or sponsor, enabling you to continue creation of the external entity entry.

However if the entity/sponsor that you are looking for does not exist, and you have the required security privileges, you can add a new one by clicking the **Add New** button; your screen refreshes to display a new Add Contact screen.

Since external contacts may belong either to a new sponsor or an external entity, those are the only options available. Select the type that you wish to create (based on the contact that you are adding) and click the **Continue** button. For help on either creation type, please see New Sponsor or New External Entity.

Once you have created the desired entity or sponsor and closed the popup window, your contact record refreshes and the created entry is selected as the entity/sponsor; you will be back at the Contact – New screen (see above).
New Internal Contact

Internal contacts are people within your organization; ordinarily they are already entered in your system and are a part of the personnel list; however, if, for whatever reason, they are not present, you may add them with this function.

Selecting Create New Internal Contact and clicking the Continue button begins the process of creating a new internal contact.

Click the Close button to cancel contact creation and close the popup window.

Or enter as much information as you possibly can to make a useful contact record. To update the Department field, click the Set link; the Departments tree opens in a new popup window. From here you can search for and find the desired department to assign to this new contact.
You can locate the department to assign to the person either by navigating the tree diagram to find the desired department or by selecting one of the letters along the top screen to populate the pick list only with the departments beginning with that letter. With the pick list narrowed, you may select a department from the list and click the **Locate** button to instantly expand the tree diagram and highlight the selected department.

Regardless of which method you use to find and select a department, checking the radio button next to the department that you wish to assign and clicking the **Select** button will close the popup window and assign that department to the new profile being created. You will then be back at the contact new screen.

Once you have completed creating your new internal contact, click the **Save** button to create it. You may then close the popup window; your screen refreshes as the system saves the new entry.
Contact Portal Security

Contact Portal Security enables anyone who assigned as a Contact Portal Administrator to control access to the powerful new contact portal accessed from the My Contacts box located in the New Portal. Since so much information is accessible from the contact portal, it is important to keep these assignments in mind because the privileges assigned here to the default user profile determine what privileges are granted to every user given access to the contact portal.

**Note:** you can create an additional entry for a person, group, or role and configure their contact portal access; people configured in this manner do not receive the privileges granted to the default user.

Access Contact Portal Security by selecting **Contact Portal Security** from the My Contacts menu.

<table>
<thead>
<tr>
<th>Add User</th>
<th>Security</th>
<th>General</th>
<th>Related Items</th>
<th>Financials</th>
<th>Privileges</th>
<th>Classification</th>
<th>Docket Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add User</td>
<td>Edit</td>
<td>View</td>
<td>View</td>
<td>View</td>
<td>Edit</td>
<td>Edit</td>
<td>Edit</td>
</tr>
<tr>
<td>Add User</td>
<td>Edit</td>
<td>View</td>
<td>View</td>
<td>View</td>
<td>Edit</td>
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<tr>
<td>Add User</td>
<td>Edit</td>
<td>View</td>
<td>View</td>
<td>View</td>
<td>Edit</td>
<td>Edit</td>
<td>Edit</td>
</tr>
<tr>
<td>Default User</td>
<td>Edit</td>
<td>View</td>
<td>View</td>
<td>View</td>
<td>Edit</td>
<td>Edit</td>
<td>Edit</td>
</tr>
<tr>
<td>Anderson, Donald</td>
<td>Edit</td>
<td>View</td>
<td>View</td>
<td>View</td>
<td>Edit</td>
<td>Edit</td>
<td>Edit</td>
</tr>
<tr>
<td>Waldin, Jeffrey</td>
<td>Edit</td>
<td>View</td>
<td>View</td>
<td>View</td>
<td>Edit</td>
<td>Edit</td>
<td>Edit</td>
</tr>
</tbody>
</table>

Three possible actions may be undertaken on this screen:

- **Add a User or Group** – clicking the User, User Group, or User Role links open the appropriate pick list, enabling you to search for and add the group or user of your choice. Once a group or user has been added, you may perform the other two available actions.

- **Remove User or Group** – clicking the icon removes the user or group from the table.
  
  **Note:** removing a user or a group does not remove them from the system, only from this configuration.

- **Assign Access** – you can assign edit or view access to the various information available in the contact portal by clicking on each box to shuffle through the three types of access available for assignment:
  
  - **View** – view access grants the person or group the ability to see the information entered in those parts of the contact portal, but not alter it in any way.
  
  - **Edit** – edit access grants the user or group the ability to see and alter the information entered in those parts of the contact portal.
  
  - **Blank** – blank or none access removes access to the information entered in those parts of the contact portal.

This setup can be relatively tricky in that all users gain the access specified for the group, unless you specifically add them separately and grant them different privileges.

For example, in the screen capture pictured above, all users with access to the contact portal will have the access privileges granted to the Default User with the exception of Anderson, Donald and Waldin, Jeffrey. These two users will instead have the access privileges granted specifically to their profiles.
5. The Old Portal

The portal that you see after you log in is determined by the administrators, as they may configure it so that users see either portal by default. But since the Old Portal is primarily used by administrators, most users will probably never log in here by default or even see the Old Portal.

However in organizations that license the Technology Transfer (TT) module, administrators may choose to have some users log in and see the Old Portal since TT only exists here and is not present in the New Portal like the other modules of the InfoEd Global Suite.

When logging into the Old Portal, the Messaging screen will be open by default.

This portal’s design differs from that of the New Portal in that the majority of its navigation is all on the left side, although there are a few navigation icons and links located in a menu along the top of the screen as well.

It is primarily the links in the left navigation bar that lead you elsewhere in the system and enable you to access the different tools and data to which you have access; but the top navigation menu does allow for a small amount of navigation as well.

**Note:** Depending on your organization’s InfoEd Global licensing agreement, your screen may display more or fewer navigation links on the left side; for example, “Tech Trans” only appears if the TT module is licensed by your organization.
5.1. Top Navigation Menu

In the Old Portal, the top navigation menu consists of two parts that we refer to as the stationary tool bar and the navigation path. These two parts work together to help you identify where you are in the system as well as to help you perform some other minor navigation and standard tasks.

This information is always open at the top of the screen.

In both Portal and New Portal, the Stationary Tool Bar is a consistent and important tool central to successful navigation within your institution’s InfoEd Global Suite. It is always located in the upper left corner of the screen, whether in the Old or New Portal, and is always a series of icons:

- **Back** – like your browser’s back button, clicking the icon returns you to the previous screen visited.
- **Logout** – clicking the icon logs you out of the system completely.
- **Help** – clicking the icon opens the Portal help in a new popup window.
- **New Portal** – this icon acts as a toggle; depending on which portal you are in, clicking the icon will move you to the other portal. Since we are in the Old Portal, clicking the icon takes you to the New Portal.
- **Support** – clicking the icon opens a new popup window containing the support website. By default this link leads to www.infoed.org, but the administrator can configure it to lead to any other website or disable the icon, and its link, completely.

The navigation path appears to the right of the stationary tool bar when you have navigated away from the main Old Portal screen; it does not appear in the New Portal at all.

This path helps you keep track of where you are in the system and also doubles as a way to return to any of the screens that you navigated through on the way to this one. For example, in the path displayed above, it shows that you are in the pending area of Technology Cases in the TT module. You could choose to return to the either the main Technology Cases screen or the Tech Trans screen by clicking the appropriate hyperlink; the navigation path would then update to reflect your new location.
5.2. Left Navigation Bar

The left navigation bar (also sometimes called left navigation menu) is the major method used to travel through the Old Portal’s many screens. Just as with the New Portal, many of the menus here in the Old Portal expand when clicked on and contract when another one is clicked; this keeps the amount of vertical scroll to a minimum.

**Note:** this is a custom screen capture created to show the two parts of the left navigation bar, as well as how one menu collapses when the other is selected.

In this portal, the left navigation bar consists of two distinct parts:

- **Personal** – this is the user’s side of the Old Portal and is also the menu open by default when this portal is accessed. From this menu a user may access any of the tools, functions, and modules to which they have been granted access; this includes messaging, profile, and the Technology Transfer module (if it is licensed by your organization).

- **Administration** – this is the administrator’s side of the Old Portal and is only accessible by personnel who have been granted some sort of admin access, whether to the system-wide Enterprise configurations or only to the module-specific ones.

  **Note:** there are multiple levels of administrators in the InfoEd Global Suite. Having admin access to a module, or even to part of Enterprise, does not automatically grant you access to all other administrative areas. Please see the Enterprise Administration manual for more information on administrators and how they are assigned these privileges in Security Admin.

Just as you would with any other link, clicking on a menu or link takes you to that area. You will only see the links and menus for places to which you have been granted access; no other links will be visible to you.
5.2.1. Messages
Throughout the project lifecycle, the InfoEd Global Suite's Messaging Center enables communication between various users. These project-oriented messages link to items within the InfoEd Global Suite and allow Investigators and Administrators to efficiently manage project communications as well as track and respond to project-oriented requests.

When you first login to the Old Portal, you are in the messaging portal by default. However you may also access it by clicking Messages.

Messaging in the Old Portal is slightly different than that of the New Portal because you have to click the name of the person before you will see the message category folders. This is done to help keep the mailbox interface separate for those users who has been granted access to another user's messages, such as by being assigned as a delegate in that person's profile (see Profile – Delegates).

Once a person's name is selected, your screen refreshes to display the category folders.

Messaging in the InfoEd Global Suite functions identically to most any of the email program clients to which you are used to, with separate folders for the various categories of messages. Clicking on any folder refreshes your screen, displaying all messages of that category. Once a folder is opened, any messages (or tasks) of that category can then be opened for reading, forwarded, deleted, replied to, saved, etc.
5.2.2. Profile
Clicking the Profile menu refreshes your screen to the General screen of your profile in the New Portal interface. Please see 4.1.3. My Profile for more information on the profile and its multiple screens.

5.2.3. Calendar
Calendar gives the user the ability to track scheduled events, appointments, reminders, tasks and Administrative Notes. It also includes the ability to view multiple calendars.

Embracing standard calendar functionality, the Portal Calendar function expands to include the ability to manage individual events directly related to the components within individual modules. The Calendar also incorporates a Delegate-Access feature, allowing others to assume calendar access as well as the ability to set Location/Resource events.

To being, click on the Calendar tab from the Portal side bar.

The Calendar will open, set to the user's name. The default date will equal "Today's" date. The Calendar tab is broken into three (3) main sections: Filter, Month View and Full Day View.

The Calendar Filter contains options for the Person (includes user and other persons that the user is a delegate for), Location/Resource, and Range.
Next choose the desired time frame from the RANGE pull down pick list. You have the option of choosing either Today’s Calendar (selected by default) or This Week’s Calendar for the current week. When you have selected the desired elements, click the Apply button.

The Month View in Calendar allows users to select, view, and edit any date within the selected month. By default when accessed, the calendar will be set to the current month and day. The date that appears in black indicates today’s date. All other dates will appear in blue, indicating that they are selectable to users. Click on an individual date to view the scheduled events for that day. Click on the left arrow or right arrow keys to scroll to previous or future months, respectively.

Users also have the option of printing the selected time period for a calendar by selecting the Print Calendar button that appears in the top right corner of the main calendar page.

**Creating and Editing a Calendar Event**

To create a new calendar event, select a time slot (allotted in 15 minute intervals throughout the day) with your cursor and click once.

This will activate the Add/Edit Calendar Event popup window.

Description: The text you enter in this field will appear on your calendar. The Description text field appears for all event types. Note that the default description for Event Type “Blackout” is “Unavailable”.

![Calendar Screen](image-url)
Resources: The Resources box allows you to tailor the event to your needs. The Resources box appears for all event types except for “Administrative Note”.

- Start Date and Start Time - correspond to the slot you selected on the calendar main page.
- Duration - You may choose a duration in 15 minute increments from the pull down pick list. Event durations can be scheduled for up to 9 hours, provided you have no scheduling conflicts.
- Assigned To: This will list the personnel to whom the event has been assigned. If you are creating an event through your own calendar view, the event will automatically be assigned to you. You may assign additional personnel by selecting the Assign Additional… link. This will activate a personnel selection popup. You may select additional personnel for the event by using the alphabetical split list and the pull down menu, or by searching for particular personnel using the text field below. Once you have found the desired personnel, click on the Select button to return to the Event Detail menu. You may repeat this as many times as desired to add personnel to your event.
- Where: Clicking on the Item for link allows the user to indicate a location for the event. Selecting this link will activate a Location Selection popup window. You may select a location from the hierarchy tree that appears or by using the text field to search for the desired location. When you have found the desired location, click the Select button.

Event Type: Use the pull down pick list to choose an Event Type. There are five different event types users may choose from when creating a calendar event:

- Administrative Note: Allows users to set a basic reminder on their own (or another user’s) calendar.
- Appointment: This is the default Event Type. Appointments allow users to choose personnel and locations for reservation on a calendar.
- Black Out: Allows users to choose all customizable fields available for appointments. The Event Type in this case signifies that certain users and locations are unavailable for the time selected.
- New Patient Visit: Allows users to choose all customizable fields available for appointments. The Event Type in this case signifies that certain users and locations are unavailable for the time selected.
- Personal Event: Allows users to choose all customizable fields available for appointments. The Event Type in this case signifies that certain users and locations are unavailable for the time selected.

Note: Appointments, Black Outs, New Patient Visits, and Personal Events will display on the calendar according to the time set for the event. Administrative Notes will display at the bottom of the screen for the date entered. Not all event types will be available. The variety of event types to which users have access is dependent upon which InfoEd Global modules your institution uses, and the security rights of the individual user.

Background Color: Allows users to select the display color for an event as it will appear in calendar view.

Priority: Users choose from either “Normal” or “High” by selection with the pull down pick list. Selecting “High” priority for an event will flag an event as such as it appears on the calendar with a ! sign. The default Priority is Normal.
When you are finished selecting the settings for the event, click the Save button followed by the Close button. The page will automatically refresh, with the event saved and embedded in your calendar as a selectable link.

From the menu under Calendar View for the personnel selected, you may select an event for viewing and/or editing by clicking on the event link. This will open the Edit Calendar Event popup window, allowing you to view the personnel and locations associated with the event, or make changes to any of the menu options.
You may delete personnel or locations that have been associated with the event by selecting the delete icon that appears next to them. You may also add new personnel and/or locations by clicking on the corresponding link. You may also change the properties of the event as it appears on the calendar (Event Type, Background Color, Priority). After making any changes, click the Save button followed by the Close button.

The Add/Edit Calendar Event popup window also allows users to cancel events and remove them from a calendar by clicking the Delete Event button.
A popup will appear so you can confirm the deletion. Click OK to delete. A message stating the Event deleted successfully will appear. To close the popup click Close Window. The event will no longer be on the calendar.

**Compliance Notes**

Compliance Notes are shown on the Calendar (located at the bottom of the day’s schedule) for those institutions that are currently using InfoEd Global’s Compliance modules (Human Subjects, Lab Animals, and Environmental Health & Safety).

The Compliance Notes field links the user to protocols that were submitted for a given day. Compliance Notes are pink at the bottom of each individual day field.

The name of the module and the number of items submitted that day will appear in the hyperlink. Click the desired hyperlink to view the item details.

This will activate the Compliance Notes Detail popup (below).

**Number:** The Institution Number of the submission.
**Title:** The title of the protocol.
**PI:** The Principal Investigator of the protocol.
Department: The PI’s department affiliation.
Primary Sponsor: The Primary Sponsor of the protocol.

In addition to the above fields, the option to Edit and/or View the protocol in the development or management modules may appear. A user’s security is set by the Administrator and will determine the user’s access.

**Tasks**
The bottom section of the Calendar also shows Tasks Due Today. The link here is to the Task as a Calendar event and can be edited in the Calendar the same as other Calendar events. This does not affect the Task itself, only how it is viewed on the Calendar.

The Task detail will be in Messages>Tasks and can be accessed by clicking on the Open icon.

5.2.4. Contacts
Though clicking this link refreshes your screen to display a contacts interface, this functionality has been rolled into the messaging portal and is no longer necessary as an area of its own. This link will likely be removed completely.
5.2.5. Find Funding
Clicking this link expands the Find Funding menu to display its two links and also refreshes your screen to display the Find Funding screen.

From this screen, you may perform two actions:

- **SPIN** – clicking on the SPIN link located onscreen or in the left navigation bar opens a new popup window containing the SPIN interface.

On the SPIN screen you may create queries to search for available funding, locate experts, search patents, among other functions.

**Note:** please see the SPINPlus User’s Guide (accessible by clicking the Help link on the SPIN screen) for more information on using this useful tool and its myriad functions.
• **SMARTS** – clicking on the SMARTS link located onscreen or in the left navigation bar expands the left navigation bar and refreshes the screen, displaying the SMARTS Preferences.

Using the Preference screen and the other screens now available in the left navigation bar, Keywords, Applicant Types, Award Types, Geographical Restrictions, Sponsor Types, and Locations Tenable, you can fully configure how the system determines which opportunities it should send to your email and how those messages will appear.

**Note:** please see the SPINPlus User’s Guide (accessible by clicking the Help link on the SPIN screen) for more information on configuring these setups.
5.2.6. CV Database
The CV (Curriculum Vitae) Database enables you to search through any GENIUS profile made public; in doing so you can more easily search for people who have specific knowledge, skills, expertise, or other traits that would aid a future or ongoing project.

**Note:** only those profiles made public by an administrator are searchable on the global GENIUS network; additionally, administrators may also choose to block specific information while making other information public.

On the Locate Experts screen you may create queries to search for experts based on area, keywords, and many other traits.

**Note:** please see the SPINPlus User’s Guide (accessible by clicking the Help link on the Locate Experts screen) for more information on using this useful tool and its queries.

5.2.7. Projects
Projects are a way for you to create customized sets of records, even if they are not from the same module. These sets would be ideal for following a project completely, for example by linking together the grant proposal, the technology disclosure, the protection filings used to secure its rights, the clinical trials in which it was tested, the licensing agreements, etc. By making these records all a single project, data would be shared between the records, greatly reducing data entry and the potential for clerical errors.

**Note:** the Project functionality is under construction and will be fully documented in a future release once it is completed.
### 5.2.8. Module Menus

The module menus in the left navigation bar of the Old Portal begin to appear just after the Projects menu and before the Help link.

<table>
<thead>
<tr>
<th>Module</th>
</tr>
</thead>
<tbody>
<tr>
<td>InfoEd</td>
</tr>
<tr>
<td>CV Database</td>
</tr>
<tr>
<td>Insights</td>
</tr>
<tr>
<td>Proposals</td>
</tr>
<tr>
<td>Protocols</td>
</tr>
<tr>
<td>Tech Trans</td>
</tr>
<tr>
<td>Help</td>
</tr>
<tr>
<td>Administration</td>
</tr>
</tbody>
</table>

Since all of the other modules in the InfoEd Global Suite are located only within the New Portal; clicking on any menu other than Tech Trans takes you to the Proposals, Human Subjects, Animal Use, or Safety Protocols areas of the New Portal, based on the link selected.


However, because it is only located in this portal, clicking the Tech Trans menu maximizes the TT module’s menu and opens the TT Portal screen, enabling you to see your action items and access any of the TT module’s components (Disclosures, Technology Cases, etc.).

For more information on any of these modules, please see the User’s Guide for that respective module.

### 5.2.9. Help

Clicking this link opens this help file in a new popup window. You can also access this help file by clicking the 🔄 icon located at the top left of the screen in both the New Portal and the Old Portal.

### 5.2.10. Administration

If you have admin privileges to any of the InfoEd Global Suite’s modules, this menu will appear. Once it is clicked, the Personal menu is minimized and the Administration menu is maximized, revealing the links to all administrative areas to which you have access. Clicking on one of those links refreshes your screen, displaying the selected administrative area. These administrative areas are divided into two basic categories:

- **Enterprise** – Enterprise consists of Organizational Admin, Personnel Admin, Security Admin, and Sponsor Admin. These administration areas are the figurative backbone of the InfoEd Global Suite, enabling the customization and maintenance of such system items as the personnel list, time zone, list of sponsors, user security, and other background system functions that affect all modules within the system. Please see the Enterprise Administration manual for more information on these configurations.

- **Module** – these administration areas enable the customization and maintenance of each individual module that your organization has licensed. Such traits as numbering system, module pick lists, and forms and form sets can be configured for that particular module. NO configurations made in module administration areas can affect any other module or part of the system. Please see the administration manual for the module (Proposal Tracking, Research Outputs, etc.) for more information on its configurations.
6. Appendices

The following are included in the appendices of this manual:

- Icon Key
- Glossary
6.1. Icon Key

- **Add Item**: This icon allows users to add an item or object to a list or collection.
- **Add New**: Used to initiate the creation of new items within the system (contacts, protocols, etc.).
- **Administrative**: This icon appears next to components that the user has administrative rights to. Clicking on the link adjacent to it provides users with access to project management-related data.
- **Attachment**: Indicates that a message contains an attached document or image. Allows a user to access the attachment by clicking on the icon.
- **Back**: Returns users to the screen most recently accessed, previous to the current screen.
- **Barcode**: Allows users to generate individual, unique, and scannable barcodes for generated protocols.
- **Change**: Assuming access has been granted by an administrator, this icon provides users with the ability to change their profile information.
- **Check-In**: When changes are in progress, clicking on this button will “check-in” the profile, and implement the changes within the record.
- **Close Message**: Closes the window that contains the message.
- **Collapse Arrow**: Collapses menus to simplify screen views.
- **Completed Action Items**: Indicates Action Items that have been completed.
- **Delete**: Allows users to delete items from the system.
- **Draft Messages**: This icon provides user access to the Message Center Draft Messages Folder, where messages that have been written, but not sent, are stored.
- **Edit**: Provides users with access to an item in order to perform editing tasks.
- **Expand Arrow**: Expands menus to allow users to access all details within a menu.
- **Expand View**: Expands the frame within the screen to allow users to have a fuller view of a Workflow Map.
- **Financials**: Allows users to access financial tracking features within the system.
- **Forward**: Opens a new message window in order to send a previously received message to a new recipient.
- **Group**: Clicking on this icon allows users to view the other users affiliated with an item or object.
Help: Allows users to immediately access online help documentation.

History: Allows users to view the “check-ins” and “check-outs” of their profile records.

Institution Support: Provides users with access to their institutions’ support systems.

Load: Allows users to view other users’ calendars for scheduling purposes.

Logout: Allows users to sign out of the system.

Message Center Inbox: This icon provides user access to the Message Center Inbox, which shows all incoming messages.

Module Help: If help is available within the currently-opened module, this icon will be present, allowing users to access help on demand.

New Portal/Portal: Allows users to toggle between the old and new portals.

Next Message: Advances a user to the next message in his or her inbox.

Open: Allows users to open and view items within the system.

Open Action Items: Indicates Action Items that are still in process.

Previous Message: Re-directs a user to the previous message within his or her inbox.

Print: Allows users to send the currently-opened item to their local printer.

Read Message: Indicates that a message has previously been opened by a user. Allows user to re-open the message.

Read Task: Indicates that there is task that has been previously accessed by a user. Allows a user to re-access the task by clicking on the icon.

Recycle Bin: This icon provides user access to messages which have been recently moved to be deleted in the near future.

Remove: Clicking on this icon will remove an item from a list or modular component.

Reply: Opens a new message window to allow a user to reply to the sender of a received message.

Reply to All: Opens a new message window to allow a user to reply to the sender of a received message, as well as to all other recipients of the message.

Report On: Initiates the process for generating reports.

Run Report: Clicking this will run the report that is shown next to the icon.

Save: Allows users to retain changes made to the current project, setup, or communication.
**Saved Messages:** This icon provides user access to the Message Center Saved Messages Folder, which contains messages that a user has decided to save for future reference.

**Sent Messages:** This icon provides user access to the Message Center Sent Messages Folder, which retains copies of all messages that have been sent by the user.

**Settings and Preferences:** Provides users with access to the user preferences menu, which allows for the customization of various features within the system.

**Show/Hide Help:** Clicking this button will reveal rollover help (?) buttons for each field, which provide explanations of information requested by the system.

**Unlock/Lock:** These icons allow users to lock or unlock protocol fields in order to edit them.

**Unread Message:** Indicates that a message or alert has not yet been opened by a user, and allows user to open the message.

**Unread Task:** Indicates that there is task that has not yet been opened by a user. Allows a user to access the task by clicking on the icon.

**Upload:** Provides users with access to an interface for uploading files to the system.

**View:** Allows users to view (but not edit) a selected item.

**View/Search:** Allows users to search for particular items within the system.

**Workflow Map:** Provides users with access to their Workflow Maps.
### 6.2. Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>alpha split list</td>
<td>A type of list in the InfoEd Global Suite. Entries are broken up by the system and filed under their first letter; great for use when there are a large number of different entries.</td>
</tr>
<tr>
<td>checking</td>
<td>Checking refers to the process of clicking on a checkbox field to fill it with a green checkmark. Checking an already checked checkbox is called un-checking.</td>
</tr>
<tr>
<td>component</td>
<td>The Technology Transfer module is divided into smaller units, each of which is referred to as a component rather than as a module to limit confusion.</td>
</tr>
<tr>
<td>disabled</td>
<td>When an administrator turns off a section, sub-section, or field for all users in the admin setups; this is referred to in the manual as disabled.</td>
</tr>
<tr>
<td>hidden</td>
<td>When an administrator alters a user’s or group of users’ security to not display a section to that set of users; this is referred to in the manual as hidden.</td>
</tr>
<tr>
<td>InfoEd Global Suite</td>
<td>Refers explicitly to the InfoEd Global software package as a whole.</td>
</tr>
</tbody>
</table>
| left navigation bar   | The left navigation bar is always located on the left side of many records and in both the New and Old Portal; as its name implies, it is used to identify where you are in the record as well as to select where you are going next.  
This is the primary mode of navigation in both the Old Portal and in most module records. |
| Management Portal     | In some older documents, the Old Portal is referred to as the Management Portal.                                                            |
| module                | The InfoEd Global Suite is divided into parts referred to as modules.                                                                        |
| navigation path       | Only appearing in the Old Portal, the navigation path helps you keep track of where you are in the system and also doubles as a way to return to any of the screens that you navigated through on the way to this one. Please see 5.1. Top Navigation Menu for more information. |
| new portal            | The new portal is the user’s side of the InfoEd Global Suite; it has a different appearance than does the management portal.                  |
| **Old Portal:** | The Old Portal is home to the administrator tools and setups; it has a much different look to it than does the new portal. Most users will not ever see or access this portal.  
**Note:** the Old Portal is also referred to as the “Management Portal” in some InfoEd Global documentation. |
| **on the fly profiles:** | This is an administrative security setup that allows a user to mimic an administrator's ability to create permanent personnel profiles from within a record.  
Without this privilege, all profiles created by the user are temporary and must be approved by an administrator before becoming permanent entries in any database. |
| **parent:** | Refers to an item from which other items are created or linked; i.e. parent disclosure or parent folder. |
| **pick list:** | Another type of list in the InfoEd Global Suite; all entries are shown in one big list. This list is best used when there are relatively few entries to display. |
| **popup window:** | Refers to the new browser windows created by the InfoEd Global Suite to obtain additional information from the user. |
| **Portal:** | In some older documentation, the Old Portal is often referred to as Portal. |
| **record:** | Refers generically to items created in the modules of the InfoEd Global Suite; a protection filing is a record, as is a proposal, an agreement, etc. |
| **review path:** | Synonymous with routing; this term refers to the administrator-customizable list of people who will examine and/or approve a particular record. |
| **routing:** | Synonymous with review path; this term refers to the administrator-customizable list of people who will examine and/or approve a particular record. |
| **stationary toolbar** | The stationary toolbar is located in the upper left of your screen and includes icons for Back, Save, Logout, Help, New Portal, and Support. |