

- Click “Login”.

InfoEd eRA Portal Streamlining Electronic Research Administration


Home

Welcome to the InfoEd eRA Portal for Electronic Grants Administration

InfoEd is the leading provider of software solutions for managing sponsored programs.

Worldwide, over six hundred academic, medical and scientific institutions rely on InfoEd to support their grant and contract activity. InfoEd's proven web-based modules streamline processes, enable proactive monitoring of compliance, and enhance internal and external collaboration.

The company provides the most comprehensive and integrated line of sponsored programs software.





- Click “Proposals”.
 - Proposals are organized into 4 categories.
 - Pending, Active, Under Development, and Closed.
- Click on the  icon next to the category of the proposals you wish to view.

InfoEd eRA Portal Streamlining Electronic Research Administration

Back Save Log Out Help | **Proposals**

Proposals




Open By Institution Number [Advanced Search](#)


Status	Items	Open
All	0	
Pending	1945	
Active	3326	
Under Development	226	
Closed	8570	

- In addition to the four categories you can also open a proposal by the Institution number. Type the number in the text box and click “Go”.

Proposals

Open By Institution Number [Advanced Search](#)

Status	Items	Open
Pending	2194	
Active	3578	
Under Development	0	
Closed	8819	

- To view the entire proposal click on the  icon under tracking.
 - The proposal will be listed with the department it was submitted under.

Browse Results Create in P

11678 Records Found. Displaying pages 1 through 10 of 468


1 2 3 4 5 6 7 8 9 10 Next [11-20]>>


*Subproject Number- PI (Associated Department)	Sponsor	Account Number / Award Number	Requested Period	Awarded Period	Development	Tracking	Forward	In Use
17198 - Ronald Lumia(Mechanical Engineering)	Sandia National Laboratories	Not Available /	30-May-2004 - 29-May-2005	-None-				
48 - Frank Gilfeather(High Perf Comp & Edu...)	University of Illinois	8-90521 / 787	01-Oct-1997 - 30-Sep-2002	-None-				
51 - Frank Gilfeather(High Perf Comp & Edu...)	University of Illinois	8-90521 / 787	01-Oct-1997 - 30-Sep-2002	-None-				
52 - Frank Gilfeather(High Perf Comp & Edu...)	University of Illinois	8-90521 / 787	01-Oct-1997 - 30-Sep-2002	-None-				
13988 - David Wachter(New Found Unit0)	Default Sponsor	Not Available /	-None-	-None-				
131025 - Robert Duncan(Physics and Astronomy)	Unknown	Not Available /	-None-	-None-				


- Security levels within eRA Portal vary. Your screen's can differ.
- To view the entire list of proposals with in your security level click the "Go" button next to "Show All".


Personal


- Messages
- Profile
- Calendar
- Contacts
- Find Funding
- CV Database
- Projects
- Proposals
 - Pending
 - Active
 - Under Development
 - Closed
 - Advanced Search
 - Reports
 - Help - PD
 - Help - PT
- Protocols
- Help

Show All  Create in PT



Open By Institution Number 

Open By Account Number 


Open By Deadline 


Award No. 


Results per page: 25 50 75 100 500


or Apply Filters  


Browse by

Sponsor Name 

Sponsor Type 

Associated Department 



Principal Investigator 

PI Department 


Filters


Filters can be applied by customizing the following screens. You can choose to show all results or filter by any of the following options. Click the "Set" button next to any of the browse by fields and/or click the check box next to the proposal status options.


- To utilize any of the browse by options click the "Set" button next to the filter of choice.


or Apply Filters  


Browse by


Sponsor Name 


Sponsor Type 

Associated Department 

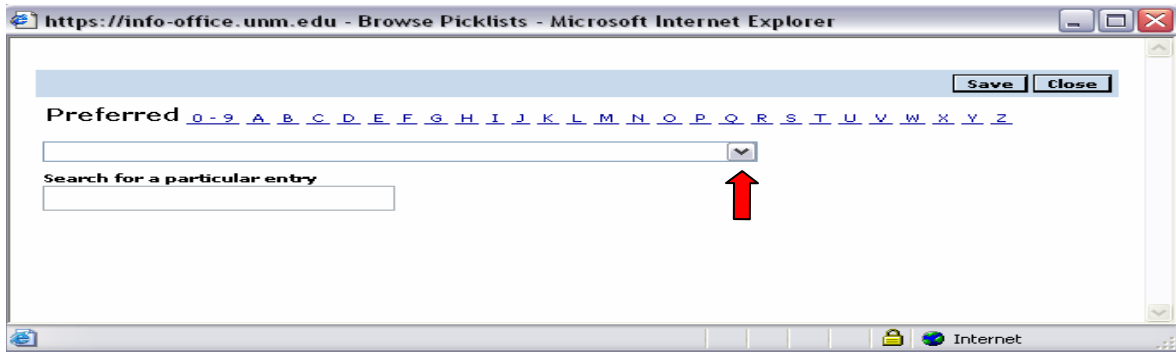
Principal Investigator 

PI Department 

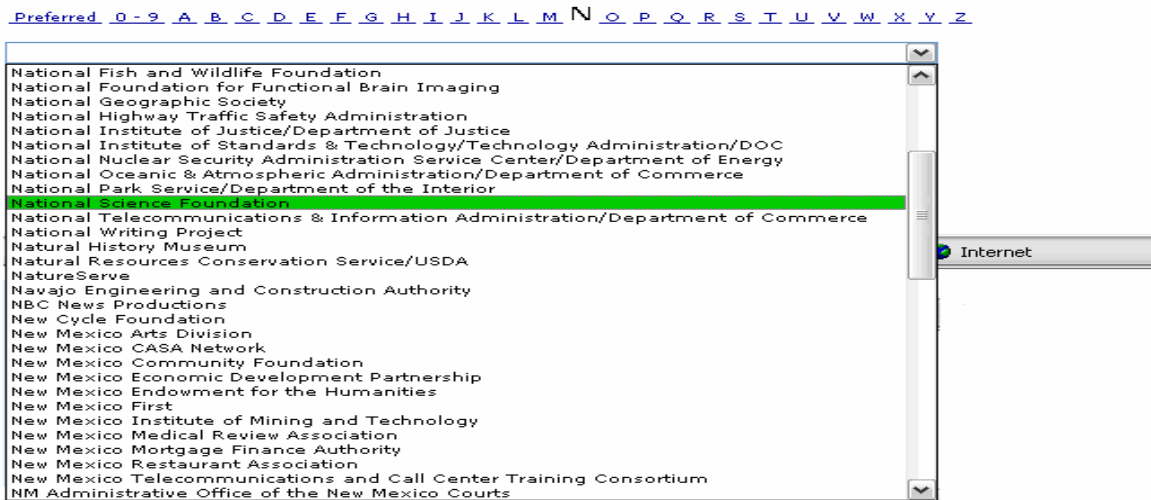
Investigator 

Investigator Department 

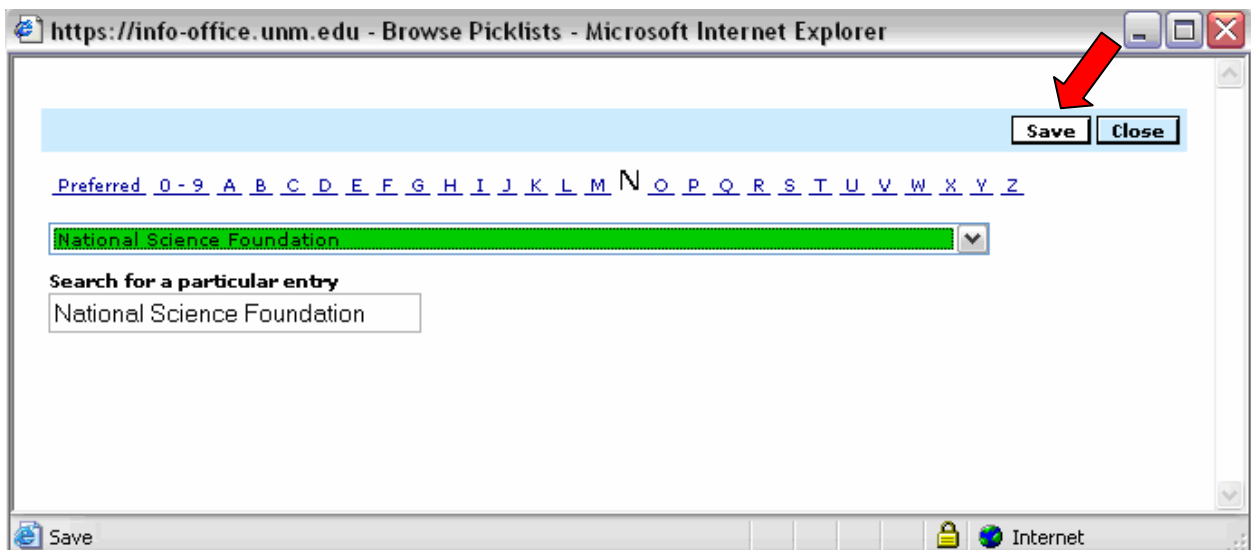
- Select the letter that corresponds to your search choice and click the drop down box.



- Scroll through the list and select an option.



- Click "Save".



- To apply the filter click “Go”.



or Apply Filters

Browse by

Sponsor Name National Science Foundation

Sponsor Type

Associated Department

Principal Investigator

PI Department

Investigator

Investigator Department

Proposal Status

Select All

Routing Completed Under Review

Pending Awarded

Disapproved Closed

Pre-Award Withdrawn

- The results will be displayed in the format shown below.

Browse Results

11678 Records Found. Displaying pages 1 through 10 of 468

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [Next \[11-20\]>>](#)

*Subproject Number- PI (Associated Department) Sponsor Title	Account Number / Award Number	Requested Period	Awarded Period	Development	Tracking	Forecast	In Use
17198 - Ronald Lumia(Mechanical Engineering) Sandia National Laboratories	Not Available /	30-May-2004 - 29-May-2005	-None-				
48 - Frank Gilfeather(High Perf Comp & Edu...) University of Illinois	8-90521 / 787	01-Oct-1997 - 30-Sep-2002	-None-				
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13988 - David Wachter(New Found Unit0) Default Sponsor	Not Available /	-None-	-None-				
131025 - Robert Duncan(Physics and Astronomy) Unknown	Not Available /	-None-	-None-				

- The remaining filter types under “browse by” will work in the same fashion.
 - The Associated Department - refers to the department the grant is housed under.
 - Principal Investigator - the main person on the grant.
 - The PI Department - the department the PI’s holds an academic appointment with.
 - Investigator – other investigators working on the grant.
 - Investigator Department - department the investigator holds an academic appointment with.
- In addition to the browse by function you can filter by the proposal status. The check boxes below can be used with the browse by options or on their own.

Proposal Status

Select All

Routing Completed Under Review

Pending Awarded

Disapproved Closed

Pre-Award Withdrawn

Revised Budget Requested Transfer to UNM Fdn

Disapproved (Internal) Under Development

Reports

- To access the reporting function click “Reports”.

The screenshot shows two side-by-side navigation menus. The left menu is titled 'Personal' and includes options like Messages, Profile, Calendar, and Projects. The right menu is titled 'Proposals' and includes an 'Open By Institution Number' field with a 'Go' button. Below this is a table with columns 'Status', 'Items', and 'Open'. A red arrow points to the 'Reports' option in the 'Proposals' sub-menu.

Status	Items	Open
Pending	2152	
Active	3572	
Under Development	0	
Closed	8815	

- Click “Reporting Tool”

The screenshot shows the 'Personal' navigation menu on the left and the 'Reports' navigation menu on the right. A red arrow points to the 'Reporting Tool' option in the Reports menu.

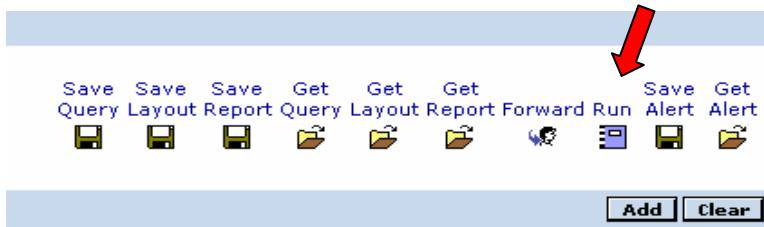
- To access the global reports created by OVPRED click “Get Report”.

The screenshot shows a toolbar with several buttons: Save Query, Save Layout, Save Report, Get Query, Get Layout, Get Report, Forward, Run, Save Alert, and Get Alert. A red arrow points to the 'Get Report' button.

- A list of frequently used reports will be displayed. To access the reports click the icon.

Open	Queue Name (* indicates Global)	Description
	Award History*	Edit Dates to Fit Period
	CESU Info*	Current & Pending by Sponsor
	Current and Pending Support*	Delete ended and disapproved
	FY02 Awards*	New Increments FY02
	FY02 Proposals*	New Proposals FY02
	FY03 Awards*	New Increments FY03
	FY03 Proposals*	New Proposals FY03
	FY04 Awards*	New Increments FY04
	FY04 Proposals*	New Proposals FY04
	FY05 Awards*	New Increments FY05
	FY05 Proposals*	New Proposals FY05
	FY06 Awards*	New award increments FY06
	FY06 Proposals*	Proposals submitted in FY06
	FY07 Awards*	New increments FY07
	FY07 Proposals*	New proposals FY07
	Infoed Lookup File*	Create Lookup File
	Pending Proposals*	Proposals with Status Pending
	Search by Spon Award Number*	

- Click “Run”.



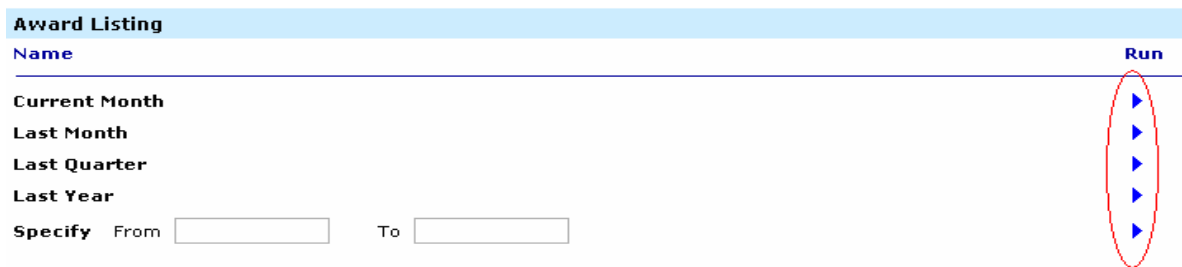
- The report may take some time to display depending on the amount of information it contains.

Quick Report

- Click “Award Listing” for a quick view of awards.

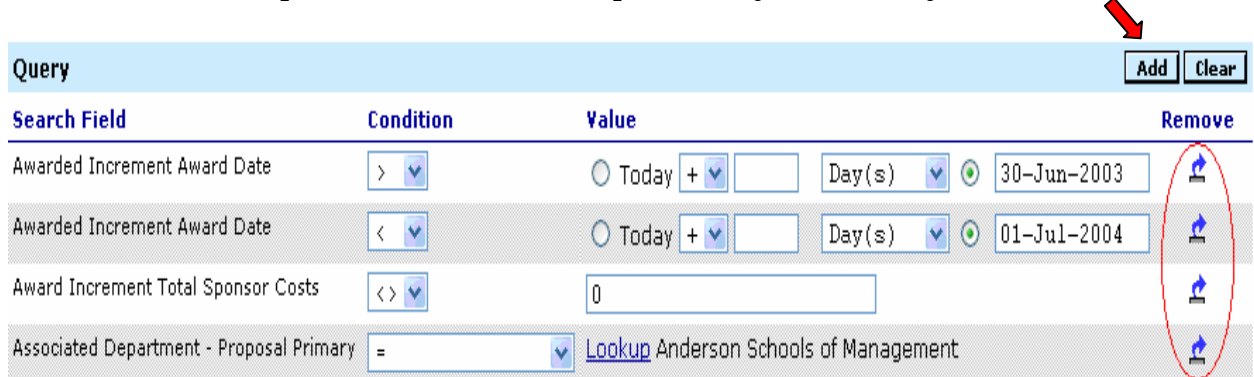


- Click the blue triangle to run the requested report.




Personal Reports

- To create your own report you will utilize some of the fields below.
 - To add query options click “Add” to remove query options click the arrow under remove.
 - Remember not all fields are in use. It is best to stay with the reports that have been previously created by OVPRED.

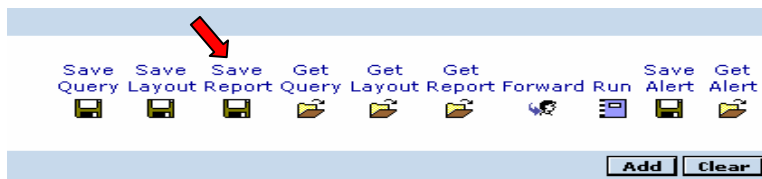


- To change the sort order of the report click “Reorder”. To add fields click “Add”, to clear this list and start fresh click “Clear”. To remove one of the fields click the arrow under remove.



Layout										Reorder	Add	Clear
Search Field	1	2	3	No Sort	Subtotal	Collapse	Live Link	Do Not Display	Remove			
Associated Department - Proposal Primary (Code - Institution)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>				
Associated Department - Proposal Primary	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>				
PI Full Name	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>				
Submitted Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>				
Institution Number	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Current Proposal Status	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>				
Sponsor Name	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>				
Project Title	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>				
Requested Total Sponsor Costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>				
Grand Total										<input type="checkbox"/>		

- Any report created here can be saved for future use. Once the layout is setup click on “Save Report”. Give it a name and a description of significance. This report will save under your profile for your use only.



- Once the report has been generated you have the option of copying all the information and pasting it into Excel. Simply highlight the information, right click – select copy; open Excel, right click – select paste.
 - With the information now in Excel you can manipulate the format to fit your department’s needs.
 - Any report you generate can be copied into Excel. Including the reports created by OVPRED.

Alerts

- To have a report sent to you via email you can setup an alert. Click on “Save Alert” name the Alert, and give a brief description. Chose the frequency, and a subject for the email message.

Save Alert: Save Close

Name:

Description:

RunTime:

Alert Status: Disabled


Frequency:

- Hourly
- Daily at
- Weekly at on
- Monthly at on

From:

Subject:

Body:



- Choose who will receive the message and click save. Remember the alert will be sent to the email address listed in your account. Initially it is best to send the report only to “self”. Once you receive the report it can be forwarded on.

Email Report

- Self
- Module Administrators
- Research Administrators
- PI
- Investigators
- Department Heads
- Department Administrators
- Individuals

Add **Remove**

- If you have any further question please email research@unm.edu