

San Diego State University Research Foundation

InfoEd Reviewer Dashboard Electronic Routing Procedures



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Table of Contents

InfoEd Overview..... 2

Email Link..... 2

InfoEd Portal 3

Reviewer Dashboard 4

InfoEd Overview

Electronic routing form (e-form) reviewers include the PI, SDSU Co-PIs, chairs, deans and SDSU Division of Research Affairs. Each reviewer has the responsibility to ensure that each proposal is submitted within the constraints of the agency guidelines and SDSU research priorities.

For the PI – After the proposal e-form you initiated is completed by you and your development specialist (DS), and the associated routing information confirmed, your e-form is started on the **“Campus Route”**.

The **“Campus Route”** sends the completed e-form to you and to all the SDSU Co-PIs to acknowledge and certify before the e-form is routed on to the chair, dean, and SDSU Division of Research Affairs. Follow the steps below to acknowledge and certify the e-form.

For each SDSU Co-PI – The PI has named you in the proposal. Follow the steps below to acknowledge and certify the e-form.

For a chair, dean and SDSU Division Research Affairs – This routing e-form has criteria requiring your review and approval before the associated proposal can be submitted. Follow the steps below to review and approve the proposal materials* attached to the e-form.

***Note:** All proposal materials attached to the e-form are saved separately from the final proposal materials and will not be submitted to the agency.

There are two ways to access the reviewer dashboard:

Email Link

The reviewer (PI, chair, or dean) will receive an email with a **Proposal Approval Link**.

Click the **“Reviewer Dashboard”** link in the email notification:

The proposal referenced above is available for your review and approval. As you know, proposal submission deadlines are under time constraints, so please respond to this request within 24 hours.

Institution Number: D-0000004906

Title: TEST Testing Pre-1802-002 issue TEST

Principal Investigator: Paul Paolini

Sponsor: National Institutes of Health/DHHS

Deadline Date: 01-Mar-2018

If you are an approver, please click this link: Proposal Approval Link: [Reviewer Dashboard](#) If you are a delegate, please click the link to view the proposal: [Open Submission Package](#)

You will need to log into the InfoEd system. Your current action items will be displayed. Click on the yellow folder and the reviewer dashboard screen will display. Follow the instructions to review and record your approval.

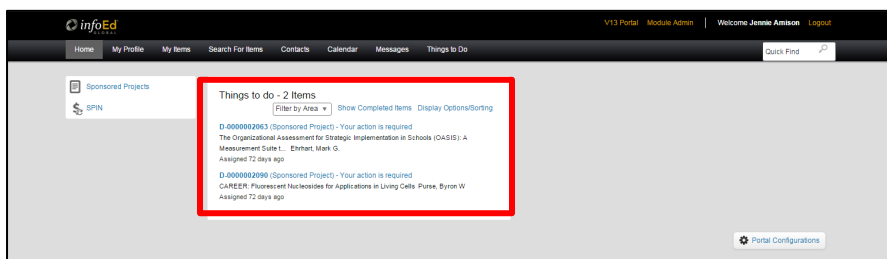
If you cannot see the link above, copy and paste the following URL into the address line of your internet browser: <https://infoed.sdsu.edu> and follow the instructions above.

InfoEd Portal

Log into InfoEd:



Once logged in, the home page will display any outstanding proposals that need review and action:



Click on the InfoEd ID hyperlink (begins with “D-###”) and you will be taken to the reviewer dashboard home screen.

Reviewer Dashboard

The Reviewer Dashboard will open

1. Select the **“Review”** tab
2. Click on the **link** to review each document
3. Once your review is complete, click **“Approve”**

Please **Do Not click “Disapprove”**. Thank you!
Contact the DS for any questions or clarification.

The screenshot shows the Reviewer Dashboard interface. On the left is a vertical navigation bar with tabs: HELP (blue), REVIEW (green, highlighted), and ROUTE (grey). The main content area displays details for a 'Proposal - Initial Application' with fields for Number, Title, Sponsor, and Submitted. Below this is a table of documents. Red callout numbers are placed as follows: 1 points to the 'Submitted' column header; 2 points to the 'Project Summary.pdf' link; 3 points to the 'Approve' button; and 4 points to the 'Close' button in the top right corner. A 'Comments I can see...' box shows 'No Comments have been recorded'. At the bottom left is an 'Add Comments' section with a text area and formatting tools. At the bottom right is a 'Select a decision:' section with 'Approve' and 'Disapprove' buttons.

Form/Document	Document Type	Submitted
Proposal Development Record		12-Feb-2018 1:39:49 PM
Project Summary.pdf	P03 Proposal	09-May-2018 9:36:58 AM Replace
Proposal Budget.xls	P04 Budget	09-May-2018 9:37:53 AM Replace
Routing Form SDSURF V1.1	P02 Proposal Routing Form	27-Jun-2018 2:44:45 PM PDF

Add Comments:
To be shared with everyone

Select a decision:

Approve

Disapprove

4. Click the **“Close”** button in the upper right hand corner to close the window.

The proposal will now route to the remaining approvers!