Introduction to InfoEd
Getting started

• InfoEd is a web-based system: https://infoed.is.mcgill.ca/
  • Disable any pop-up blockers for this site!
• Log in using the same McGill credentials used to access your “@mcgill.ca” email account
Once logged in – locating files

- Click on “My Proposals” in the left-hand bar
- Click on “Search For”
Possible search parameters

- These fields are the most common search parameters
- To see more options, click on “Show Additional Search Options”
Searching in InfoEd

You can type search parameters into any field (or more than one field to search) or you can use the “Picklist” function which helps in selecting the appropriate parameters.
Searching for a proposal

To select PI from Picklist, click here

PI selected from drop-down menu

Once PI selected, click "Save"
### Additional search parameters

**Proposals - Search For**

<table>
<thead>
<tr>
<th>Property</th>
<th>Value</th>
<th>Property</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal number</td>
<td></td>
<td>Fund Code (Account Number)</td>
<td></td>
</tr>
<tr>
<td>Sponsor/Scheme</td>
<td></td>
<td>Proposal Status</td>
<td></td>
</tr>
<tr>
<td>PI</td>
<td></td>
<td>Primary Assoc Dept</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Set</td>
<td></td>
<td>Set</td>
</tr>
</tbody>
</table>

#### Additional Search Fields

<table>
<thead>
<tr>
<th>Title</th>
<th></th>
<th>Project Status</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsor Type</td>
<td></td>
<td>Deadline</td>
<td></td>
</tr>
<tr>
<td>Sponsor Program #</td>
<td></td>
<td>Requested Start Date</td>
<td></td>
</tr>
<tr>
<td>PI Department</td>
<td></td>
<td>Requested End Date</td>
<td></td>
</tr>
<tr>
<td>Investigator</td>
<td></td>
<td>Awarded Start Date</td>
<td></td>
</tr>
<tr>
<td>Investigator Dept.</td>
<td></td>
<td>Awarded End Date</td>
<td></td>
</tr>
<tr>
<td>Award Number</td>
<td></td>
<td>Award Date</td>
<td></td>
</tr>
<tr>
<td>Protocol Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proposal Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Approval Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

- Use `*` for wildcard
- Use `!` for Sounds Like (e.g. `!similar`)
Ready to search!

- Once the search parameters have been identified, click on “Locate”
- To clear all the search fields and start over, click “clear all”
Understanding the search results

Users can sort search results by clicking on the field they want to sort.

- Project Title
- Awarded Budget Period (actual grant period)
- Sponsor
- McGill Department
- McGill Fund Number
- Sponsor File Number
- Application Budget Period
- PT Number

Hold cursor over this icon to see current InfoEd status.
Opening a record

Note that users configured with “FST” access have view-only access. Only authorized users can edit a record in InfoEd.
Where can I find?

- **Summary**: General award details, OSR comments
- **Sponsor**: Funding source(s), Sponsor Program, Award Number
- **Personnel**: Researchers and partnering organizations involved in the project
- **Budget**: Budget requested in the proposal
- **Agreements**: Any agreements/sub-agreements associated with the file
- **Attachments**: All documents uploaded into the record
- **Status history**: Shows history of all statuses assigned to the file
- **Snapshot**: Collection of all information in the InfoEd record (not generally used at McGill)
- **Awards**: Awarded budget and award parameters including terms and conditions
- **Approvals**: Any human subjects, animal subjects, and/or biohazards associated with the project
- **Related Proposals**: Other InfoEd records associated with the project (for ex., contributions from other sources, etc.)
- **Keywords**: Keywords for the project (taken from the OSR checklist)
- **Locations**: McGill locations (buildings) involved in the research project

Always consult the Awards folder (not the Budget folder) for award parameters.
Summary screen

- Last date/time record updated
- Indicates type of Proposal (LOI, New Proposal, Competitive Renewal, etc.)
- Recovery = Indirect Costs (Accredited, McGill Established Rate, Sponsor Rate, etc.)
- Project Title
- Current Status in InfoEd
- See list of status for full list and definitions
- PT Number
- Special conditions or consideration can be highlighted here. Comments added to the record while being processed in OSIR
- McGill Department
- Grants Officer who worked on application
- Awards Administrator
- RFMS Fund Administrator
- If you're not sure who to contact, look at this section to see who worked on the file.
## Most common file statuses

<table>
<thead>
<tr>
<th>File Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Initiated:</strong></td>
<td>Record is in the process of being created.</td>
</tr>
<tr>
<td><strong>In Review:</strong></td>
<td>Record created and assigned to the Grants Officer for their review.</td>
</tr>
<tr>
<td><strong>Reviewed:</strong></td>
<td>Grants Officer has processed the file, and it is now pending “full log”.</td>
</tr>
<tr>
<td><strong>Logged-Submitted:</strong></td>
<td>All data entry completed. Co-applicants have been added to the file. <strong>Logged-Submitted also means that the file is pending a decision. If you know that a proposal was awarded, but the InfoEd Status is Logged Submitted, please contact OSR, as OSR may not be aware of the award.</strong></td>
</tr>
<tr>
<td><strong>Awarded:</strong></td>
<td>OSR has been informed that the proposal was successful and is processing the file. Most files in Awarded status are pending documents.</td>
</tr>
<tr>
<td><strong>OSR Approved:</strong></td>
<td>Awards OSR has processed the award and sent the action item to RFMS for action in Banner.</td>
</tr>
<tr>
<td><strong>RRF Fund Created:</strong></td>
<td>RFMS has created the Fund.</td>
</tr>
<tr>
<td><strong>RRF Fund Approved:</strong></td>
<td>RFMS has approved the Fund.</td>
</tr>
<tr>
<td><strong>RRF File Updated:</strong></td>
<td>RFMS has processed the award approval. Fund Opening Memo has been issued.</td>
</tr>
<tr>
<td><strong>OSR File Updated:</strong></td>
<td>OSR has updated its records to include the Fund Opening Memo.</td>
</tr>
<tr>
<td><strong>OSR Re-Approved:</strong></td>
<td>OSR has made a change to the award parameters of an existing award.</td>
</tr>
<tr>
<td><strong>RFMS Renewal Updated:</strong></td>
<td>RFMS has processed the change in award parameters.</td>
</tr>
</tbody>
</table>
In cases of sub-grants to McGill, the Originating Sponsor will be the original funder. For example, a sub-grant of NSERC funding to McGill from UBC (UBC is the administering organization for the NSERC grant) = Sponsor at the top of the Sponsor screen is UBC while the Originating Sponsor will be NSERC.
Personnel screen

- All Quebec-based Principal Investigators/Co-investigators are listed in Key Personnel
- Partnering Organizations are also listed in the Personnel Screen
Agreements screen

- All agreements/subaward agreements associated with the record can be found in the Agreements screen.
- To drill-down into a particular record, click on “Open” which will provide details related to the particular agreement.
## Agreements screen (continued)

### Edit Agreements/Contracts

- **Type of Agreement**
- **Agreement Conditions**
- **Agreement Comments**
- **Agreement Status History**
  - **Current status of the agreement**
  - **Historical details, including who worked on the file**
- **Document Summary**
  - **Documents related to the agreement.**
  - To view the document, click here. Opens in a new browser window.
• For proposals from 2010-11 onwards, attachments section should include the OSR Checklist, a copy of the proposal, Notice of Award, as well as any relevant correspondence.
  • For records without attachments, please contact OSR.
• Agreements/contracts are also found in the attachments section.
• OSR naming conventions are “PT Number – description of the document”
Versioning in InfoEd

- InfoEd allows users to save multiple versions of documents under one document, users can drill down and see previous versions of a document:

Although the most recent version will open from the main attachments screen, you can always view previous versions by clicking on the documents here.
Awards screen

This is the folder that shows the awarded amounts as well as the award period (actual start date and end date).

Funding period

If Indirect Costs are being recovered, they would be indicated here.

Installment Period

Direct costs per installment

Total Awarded (Directs + Indirects)

Note - as of 2011-12, Awards OSR no longer uses "Renewal", only installment.

Approved = Awards OSR has approved the installment and sent it to RFMS for action in Banner.

If the Status indicates "NOD Received", Awards OSR has not yet released the installment.
Understanding Awards Approvals in InfoEd

### Conditional

- **Project Period**: 01-Jan-2013 to 31-Dec-2014
- **Installment year**: 2013
- **NOD Received**: 30-Mar-2013

Awards OSR has given the authorization to RFMS for all installment years, but "conditional" indicates that payment of future installments are conditional upon the PI satisfying requirements of the agency.

### NOD Received

- **Project Period**: 01-Nov-2011 to 31-Mar-2014
- **End date for each installment year**: 31-Oct-2012, 31-Mar-2013, 31-Mar-2014
- **NOD Received**: 30-Mar-2013

NOD Received indicates that Awards OSR has not approved the installment year. New Notice of Award or amended agreement is expected.
Terms and Conditions

• The Terms and Conditions delineate the award parameters and are used highlight governing terms and conditions
• Since spring 2012, Awards OSR has been adding Terms and Conditions for most awards
• Since spring 2013, Awards OSR has been uploading the “Notification of Ts and Cs to PI” into InfoEd which confirms that the PI was informed of the governing terms and conditions
Approvals screen

- All approved protocols (human subjects, animal subjects, or biohazards) associated with the project are included in this section.
- **Protocol Number:** the file number assigned by the office issuing the approval
- **Approved to:** date when the ethics approval expires. Always check the end date.
Related Proposals screen

- Any other InfoEd records associated with this record are linked in the Related Proposals section.
- To view other record, click on “Open” and the record will open in its own browser window.
Closing a record

To properly close a record, you must click “Done”. Otherwise, the record remains locked for other users.
Why hasn’t the award been approved yet?

• Before contacting OSR/RFMS regarding the status of a file, always check InfoEd first.
• OSR puts notes in InfoEd clarifying the status of the file, which will help to understand the status of the file.
• If the proposal is “Logged-Submitted”, it is likely that OSR is not aware that the funding was awarded. Contact OSR.
• If the proposal status is OSR-Approved, it means that the file has been assigned to RFMS for action.

If there is no record of the proposal in InfoEd, OSR likely has no idea that this proposal was submitted and/or awarded funding! Contact OSR ASAP.
Most Common Delays for Awards Approvals

- OSR/RFMS is not aware that the grant was awarded
- New Fund Request sent to Finance or Notice of Award sent to RFMS rather than to OSR
- Limited information provided to OSR: email with few details, detective work required
- Grant application bypassed OSR: need copy of application, completed OSR checklist, and any supporting documentation PI may have received from sponsor
- Negotiation of grant agreement: clarification or unacceptable Ts&Cs
- Compliance certificates missing
  - PI should begin process ASAP upon notification of results
- Other conditions required by sponsor: receipt of matching contribution, confirmation of appointment, multi-party agreements with partners
- RFMS is missing information from OSR to complete fund opening
Still have questions?

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