

Help Guide – Introduction to the Reviewer Dashboard & Endorsement Process

Logging into InfoEd

Access InfoEd at infoed.utoledo.edu

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

Accessing your Reviewer Dashboard

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

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

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

Orientation to the Reviewer Dashboard

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

Dashboard Header

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

Dashboard Side Tabs

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

- x Review Allows you to access links to the proposal record, record comments (if applicable) included in the proposal. You can also click on the “Development” tab which will take you to the Proposal Development Record where there will be another link to the Proposal Development Record here which will contain the full proposal package. **IMPORTANT** Items in the list that have

a drop down menu must be changed to “Reviewed” or “Not applicable” before the decision buttons become active.

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

Chrome

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

Firefox

1. Open Firefox.
2. Click the