

Help Guide – InfoEd Login & Portal Navigation

Logging Into InfoEd

Access InfoEd at infoed.utoledo.edu.

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

The Portal View

Once you are logged in, you will land on InfoEd's portal Home page. You will see a menu bar across the top, a menu list along the left side, and two permanent widgets (the white text boxes) in the center panel for Financial Conflict of Interest Disclosure and COI Entity Request.

The screenshot shows the InfoEd portal interface. At the top, there is a navigation bar with links: Home, My Profile, Locate My Records, Locate Records, Messages, Assignments, and Power BI. A search bar is located on the right side of the navigation bar. Below the navigation bar, the main content area is divided into three sections. On the left, there is a sidebar with two links: 'Proposals' and 'SPIN'. The central section is titled 'Financial Conflict of Interest Disclosure' and contains a detailed text block explaining the requirements for disclosure. Below the text is a 'Discloser Profile' table with the following information:

Discloser Profile	
ID	R9999970
Name	Nine M Faculty M.D.
Title	
Department	Test MC Department
Last Disclosure	Tuesday, Sep 19, 2023

Below the table are two buttons: 'View Previously Submitted Disclosure' and 'Update/Recertify Disclosure'. The right section is titled 'COI Entity Request' and contains a button labeled 'Request a new COI Entity'. At the bottom right of the page, there is a 'Portal Configurations' button.

Top Menu Bar (Purple Rectangle)

Home – Brings you back to your original screen and chosen widgets.

My Profile – Opens your profile information in the center panel. You can view your demographic data from Banner, your appointment (employment) data from Banner, and certification and training data from CITI. You can also assign delegates to act in your name.

Locate My Records - Opens a results list in the center panel with every record for which you are listed as Record Owner (e.g. PI). This function DOES NOT return results for proposals on which you are named as personnel other than PI.

Locate Records – Opens search criteria in a smaller window that allows you to use filters to search for any record to which you have access, including records for which you are the PI or for which you are personnel. For department chairs and college deans, Locate Records will also include records that include personnel from their department(s).

Messages – Opens a list of any messages the system has sent to you. Messages act like email in that they can be replied to, forwarded, or deleted. The system messages DO NOT affect the contents of your Office365 Outlook email. **All system messages are also delivered via email to your UT Office365 Outlook account.**

Assignments – Opens a list of tasks or reviews that have been assigned to you.

Power BI – (Future functionality.)

Quick Find – A feature that allows the logged in user to search by record number, owner, or title at the same time for any string of characters or numbers.

Left Menu (Red Rectangle)

Proposals – Opens the proposal-specific functions in the center panel (e.g. initiate new proposal).

SPIN – Opens the SPIN Opportunity database in a new tab in the browser.

Center Panel – Widgets (Blue rectangle)

Every user will have two permanent widgets (the white text boxes) displayed in the center panel; these are mandatory and cannot be removed.

Financial Conflict of Interest Disclosure Widget

Allows you to create or update your financial conflict of interest disclosure as required. The buttons at the bottom of the widget are context sensitive to the current status of your disclosure.

COI Entity Request Widget

Allows you to request a new entity for inclusion in your disclosure. The disclosure allows you to search for existing entities, and the COI Entity Request should only be used after the search within the disclosure is unsuccessful. New entity requests are reviewed before release for use.

Portal Configuration Button

Allows you to display additional widgets as well as reorganize the widgets on your portal to your liking.

Logging out of InfoEd

When you are ready to logout, click the Logout link in the upper right corner.

The screenshot displays the InfoEd user interface. At the top left is the University of Toledo logo. To the right, it says "Welcome Demo PI" and a "Logout" link is highlighted with a red rectangle. Below this is a dark blue navigation bar with links: Home, My Profile, Locate My Records, Locate Records, Messages, Assignments, Power BI, and Quick Find (with a search icon). The main content area is divided into three white widgets. The first widget on the left is titled "Proposals" and "SPIN". The middle widget is titled "Financial Conflict of Interest Disclosure" and contains text about disclosure requirements for university faculty, staff, and students. The right widget is titled "COI Entity Request" and contains a "Request a new COI Entity" button.