INFOED – PART II
PROFILE MAINTENANCE & FUNDING OPPORTUNITY SEARCHES

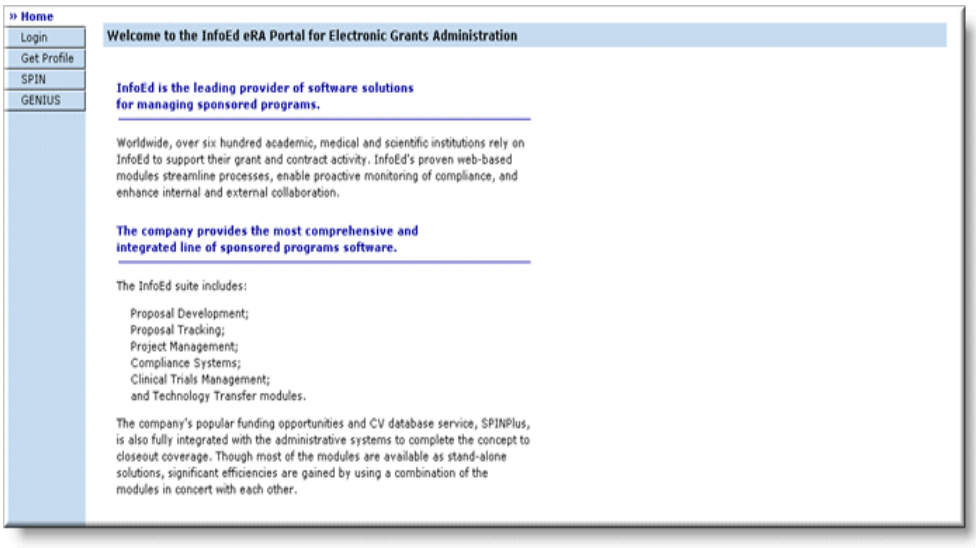
INTRODUCTION

Each user within the InfoEd Suite has a profile within the system. A username and password are created for each profile in order to grant access to the system. If you do not have these, please contact kalina.mathurin@bmc.org to obtain them. An InfoEd username and password allows you to access InfoEd Proposal Development (PD) and Proposal Tracking (PT) programs (See Part I), **to maintain your profile, to search the web for funding opportunities (SPIN/SMART), and to send and receive e-mails.** Part II of this manual outlines the procedures for these last three items.

LOGGING IN

InfoEd is accessible on any computer with an internet connection. You can access the site directly at https://infoed.bmc.org/ or you may go to the Grants Administration web page http://internal.bmc.org/grants/ (internal webpage) or http://www.bmc.org/grants.htm (external webpage) and click on the InfoEd link. This will take you to the InfoEd Home Page (below).

► **Beginning with the home page, select the** Login **tab on the left-hand side of the screen.**

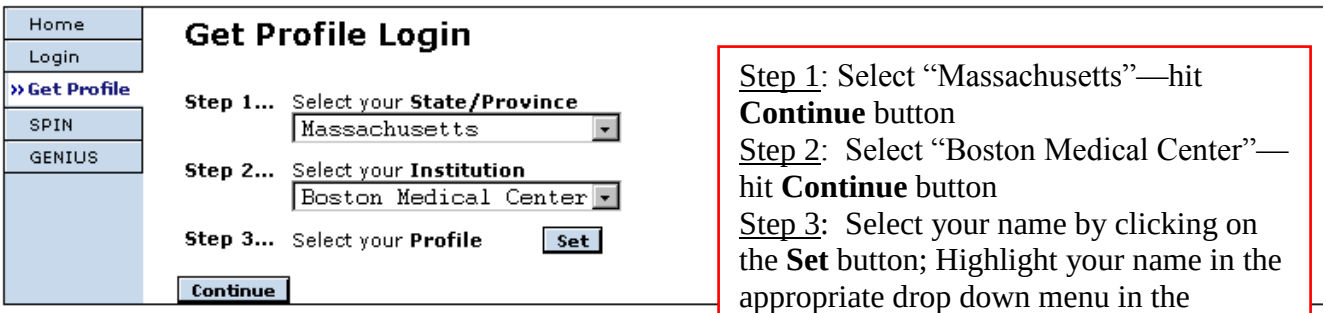


► **Sign into the system by entering your username and password, then click on the Login button on right.**

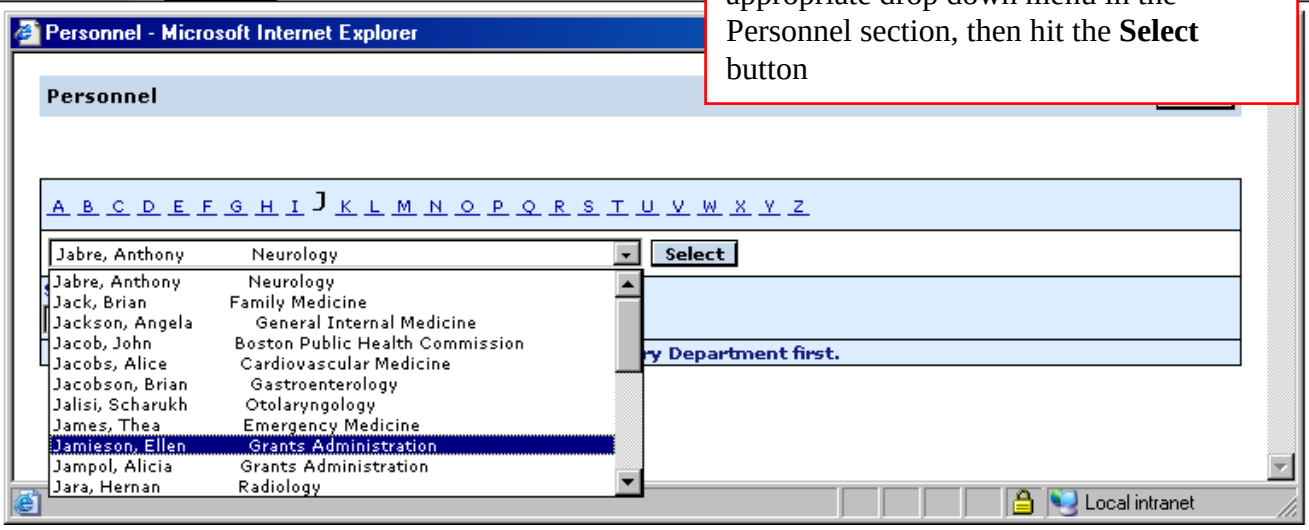
► **If you have forgotten or lost your password, please follow the steps on the next page**

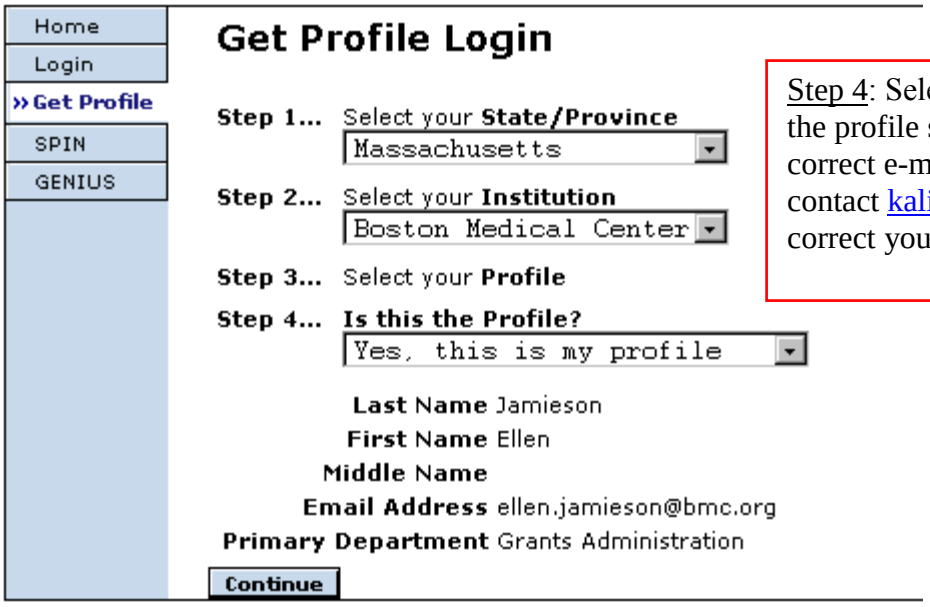
GET PROFILE LOGIN

Click on the "Get Profile" tab, then at each STEP select the following information



Step 1: Select "Massachusetts"—hit **Continue** button
Step 2: Select "Boston Medical Center"—hit **Continue** button
Step 3: Select your name by clicking on the **Set** button; Highlight your name in the appropriate drop down menu in the Personnel section, then hit the **Select** button



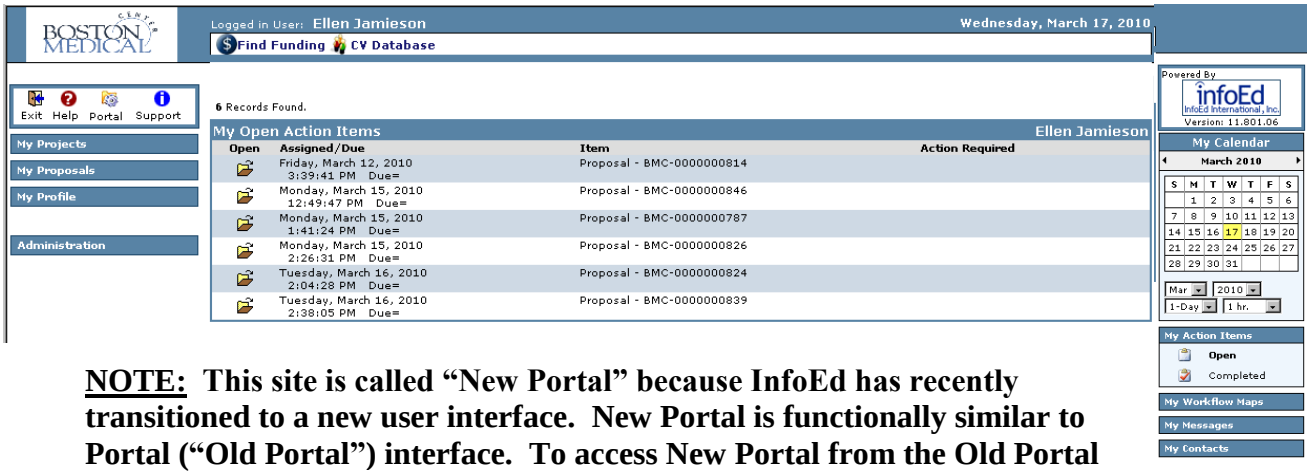


Step 4: Select "Yes, this is my profile", if the profile selected above contains your correct e-mail address. If not, please contact kalina.mathurin@bmc.org to correct your profile

► **After you answer Step 4, click on the "Continue" button and an e-mail will be sent to you containing your Username and Password.**

"NEW" PORTAL

Once you log in, you will be at the main InfoEd interface (called New Portal). This site is unique to each user depending on your access level. InfoEd is divided into different sections, or "modules", which are accessed using the toolbars.



NOTE: This site is called "New Portal" because InfoEd has recently transitioned to a new user interface. New Portal is functionally similar to Portal ("Old Portal") interface. To access New Portal from the Old Portal site, click on the

icon in the Toolbar at the top of the page. Clicking on Proposals tab or Profile tab on the Old Portal site (Figure 2) will also take you to New Portal.

The **New Portal Side Bar** (Figure 1) is composed of four segments: **My Projects**, **My Proposals**, **My Profile**, and **Administration**. The Administration section is only available to Module Administrators (Research Administration) and those selected with Access Setups (Research Business Analyst).

Figure 1: New Portal sidebar

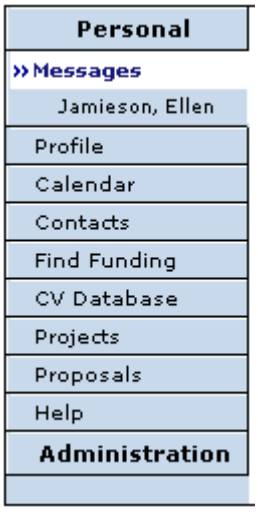
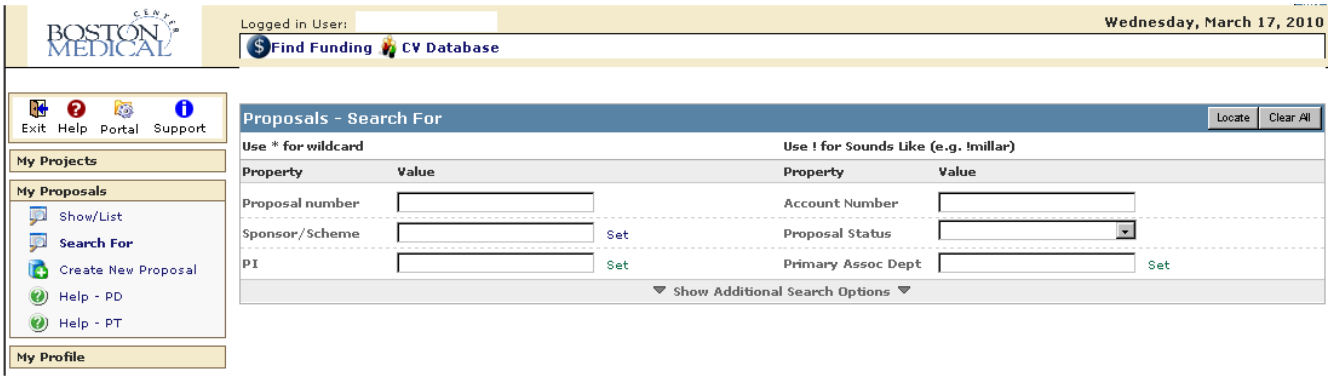


Figure 2: Old Portal sidebar

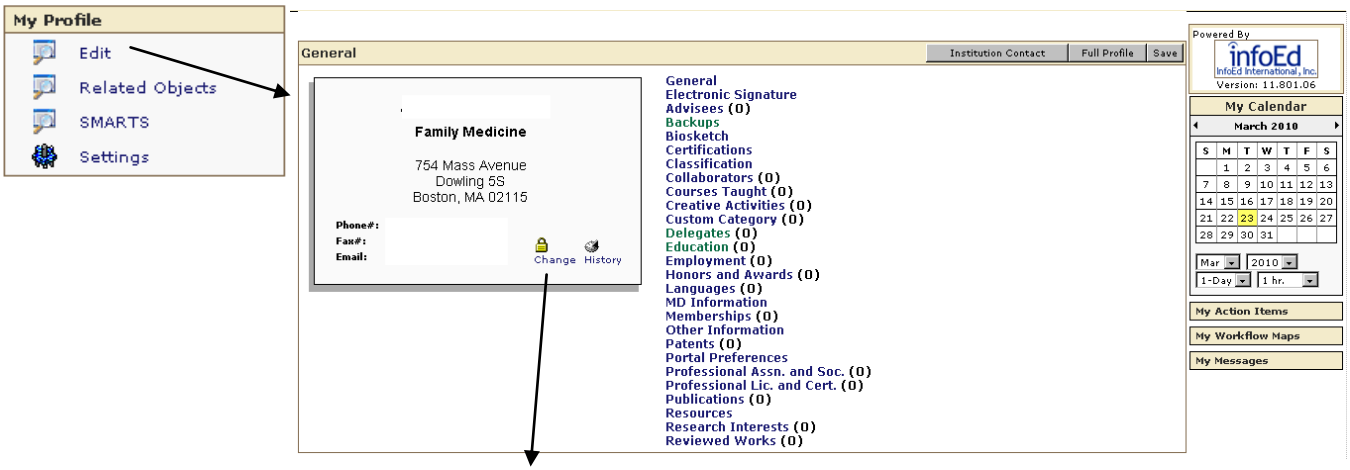
EXAMPLE: If you are in **Old Portal** (Figure 2), by clicking on the Proposals tab you will be sent to New Portal. If you are in **New Portal** (Figure 1), by clicking on My Proposals, then **Search For** will achieve the same results.



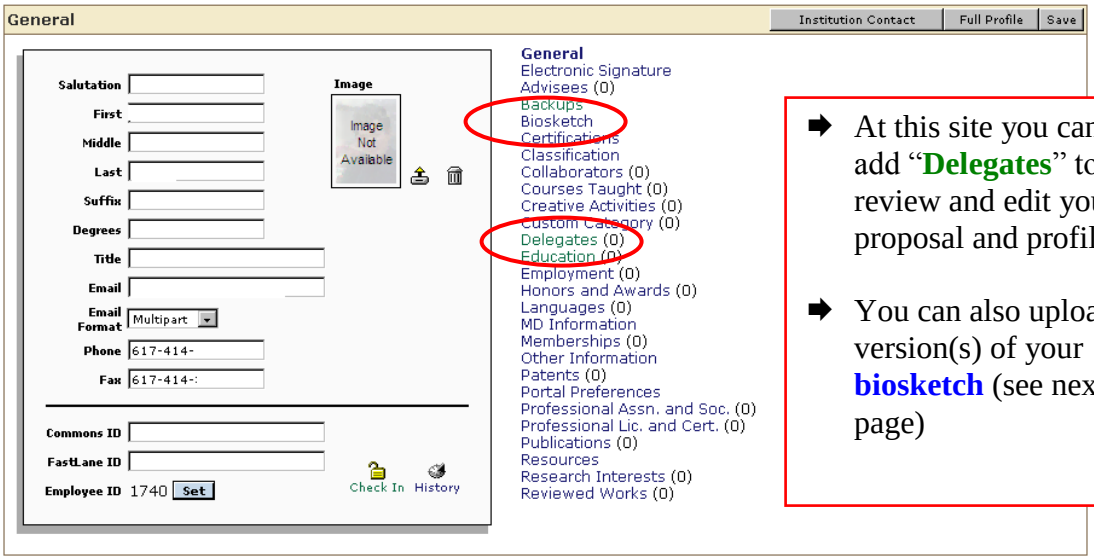
UPDATING YOUR PROFILE

The information in your "Profile" is what populates the *Face Page* and *Personnel* sections of your SF424 proposal in InfoEd. This information includes your faculty title, location, eRA commons ID, phone number, department, etc. Therefore, please make sure this information is up-to-date and correct in InfoEd by taking the following steps.

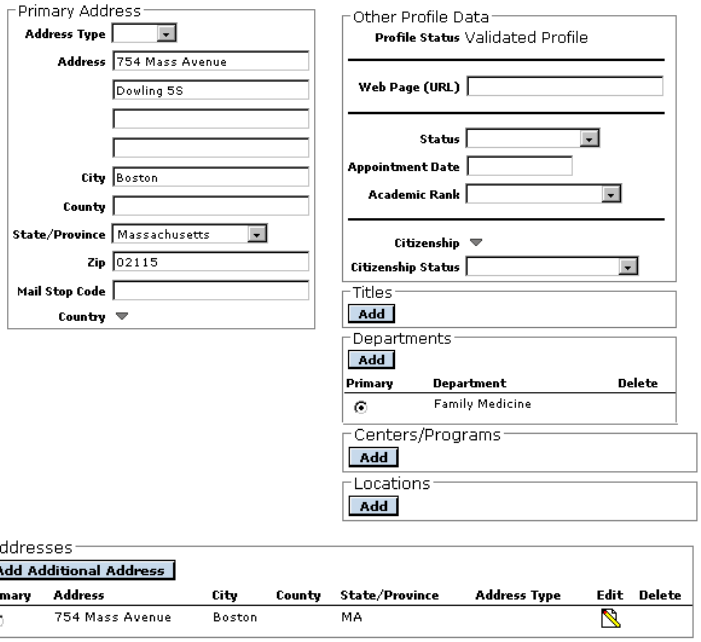
- If you are in **Old Portal** (Figure 2 on previous page), by clicking on the Profile tab you will be sent to New Portal. If you are in **New Portal** by clicking on My Profile, then **Edit** will achieve the same results.



- To edit your profile click on the Change icon. You will see the following screen (next page). You can update any of the fields in your profile, but please make sure the information you enter is what you want the Federal Sponsors to see. Hit the Save button in the upper right hand corner when you are done.
- **Do not change your Department unless you have discussed this change with the Grants Administration Office. Contact either Gretchen Hartigan (4-2880) or Ellen Jamieson (4-5646) if you wish to add or delete Department information.**



- At this site you can add "**Delegates**" to review and edit your proposal and profile
- You can also upload version(s) of your **biosketch** (see next page)



Position(s)

No Records Found

Roles and Responsibilities In Portal

Assigned Roles	System	Department
Access New Portal	Proposals,	Boston Medical Center
Department Administrator	Proposals,	Family Medicine

Security Set

Username **JeCollins**

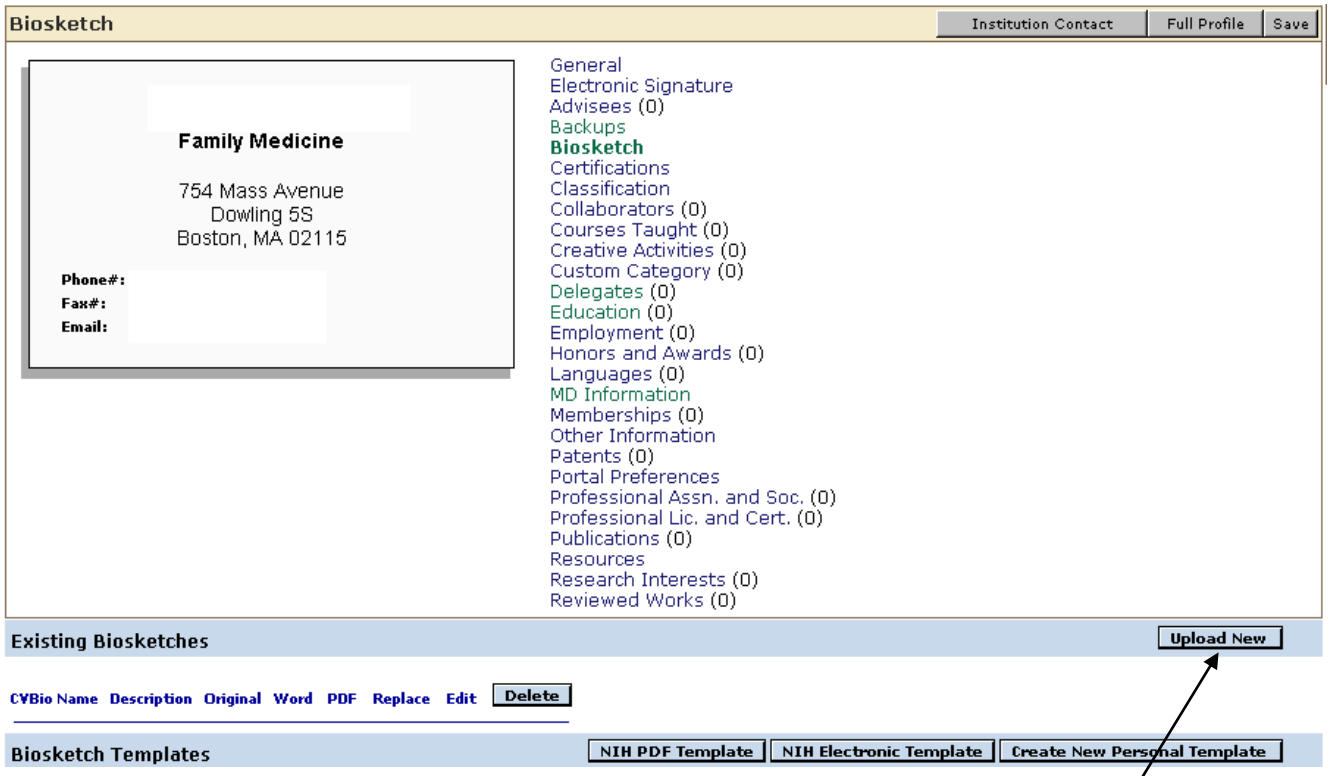
Room Usage Percent

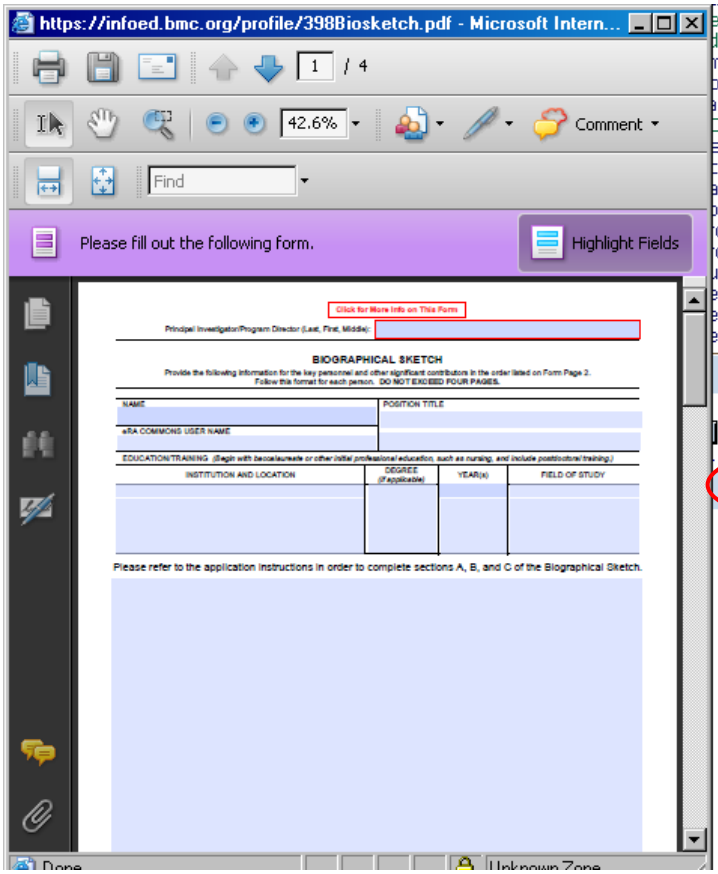
Room Usage Add

Building/Room	Percent Used	Facility Usage Type	Square Footage	Edit	Delete
No Records Found					

BUMC/BMC Employee ID

***Uploading Biosketches in Profile*:** By clicking on the **Biosketch** you get the following screen.





➡ You can either:

1) Upload an Adobe version of your biosketch by clicking on the **Upload New** button; or

2) Click on the **NIH PDF Template** and update and save the Abobe document that pops up

NIH PDF Template

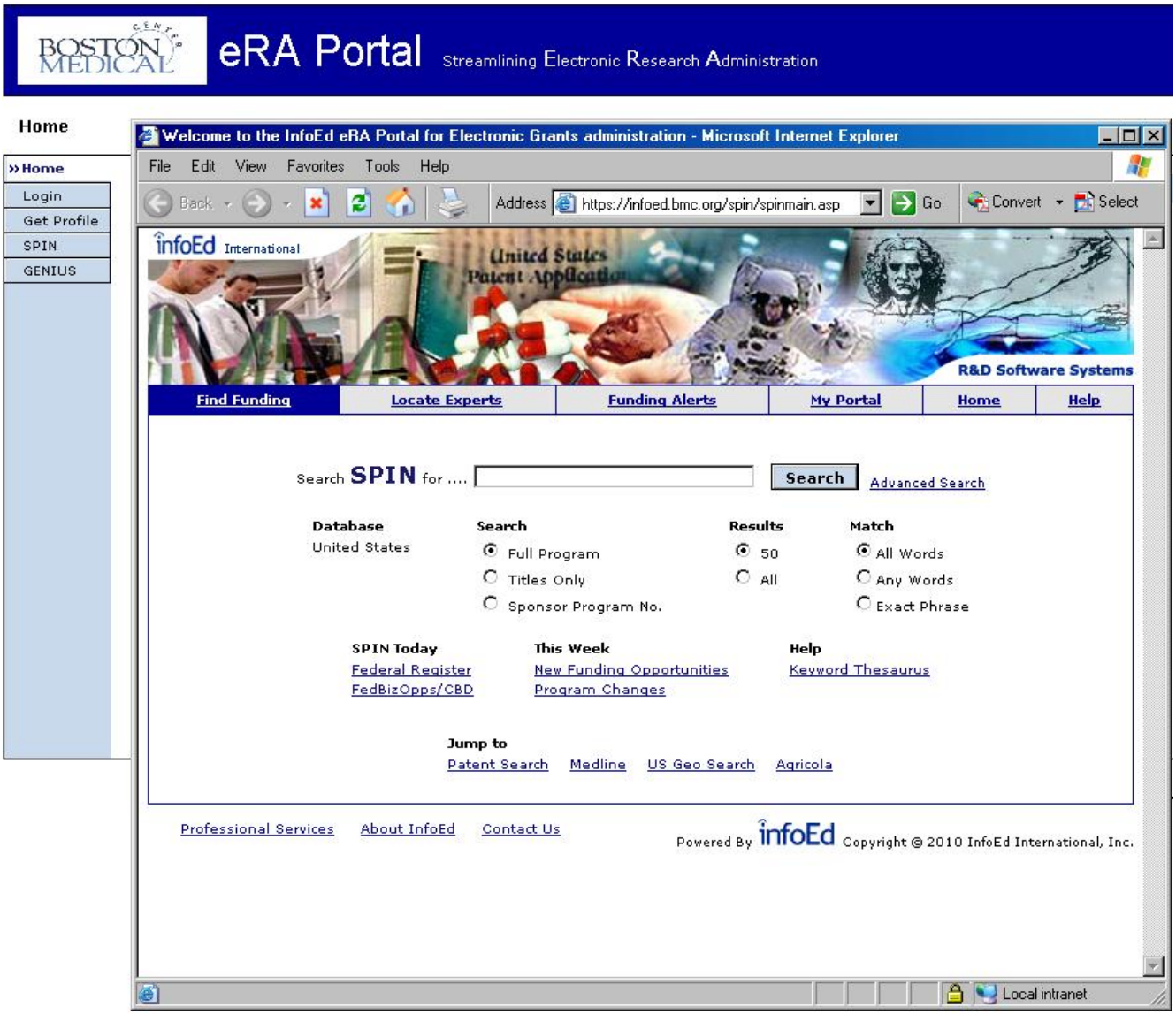
➡ Don't Forget to hit the **Save** button in the upper right hand corner when you are done.

FUNDING OPPORTUNITY SEARCHES

To search for funding opportunities in InfoEd, you can either use the InfoEd SPIN or InfoEd SMART programs. For accessing the InfoEd SPIN/SMART program searches or updates, you will have to log into InfoEd. If you do not have a Username or Password, please contact Kalina Mathurin (kalina.mathurin@bmc.org) in the Grants Administration Office.

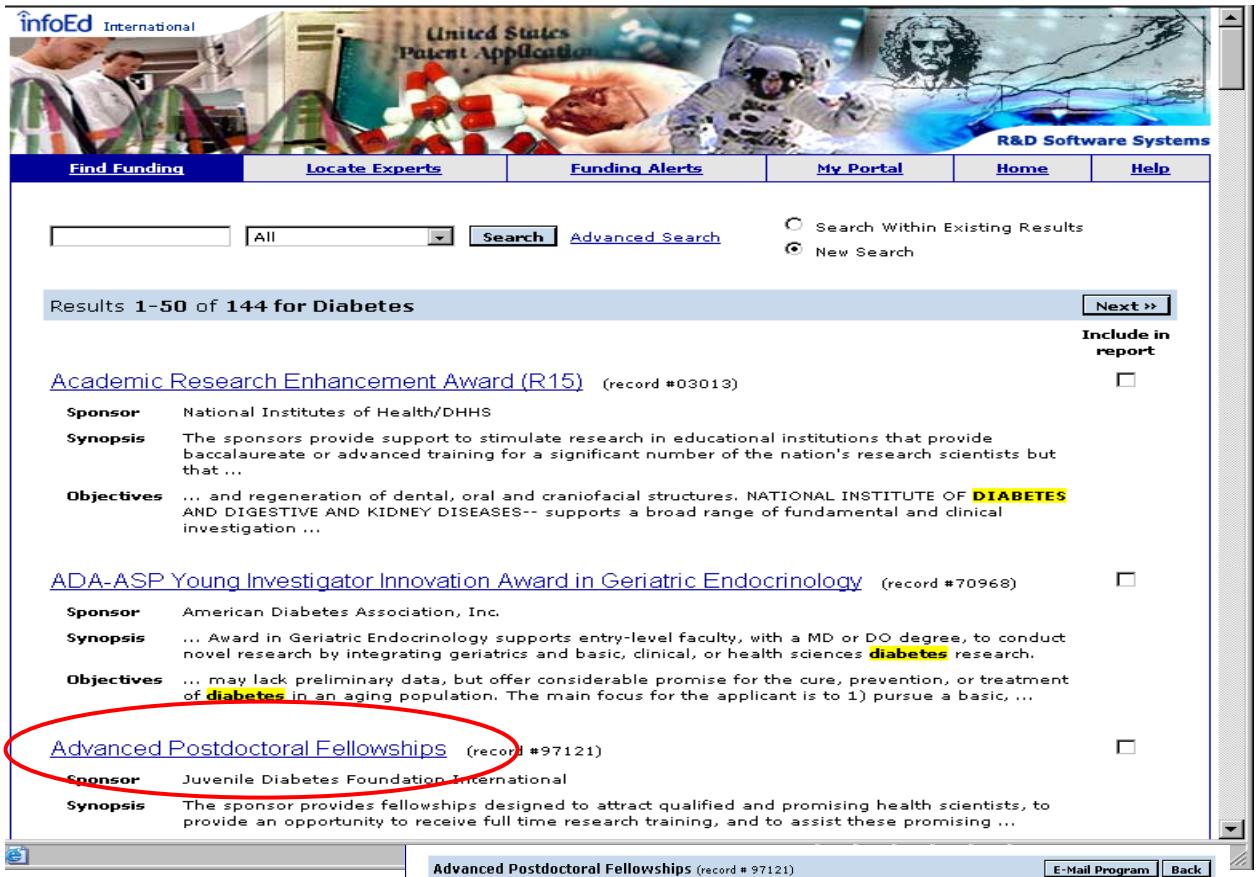
Searching for Funding Opportunities with InfoEd SPIN

➡ Click on the SPIN tab on the InfoEd home page, and the following screen will pop up.

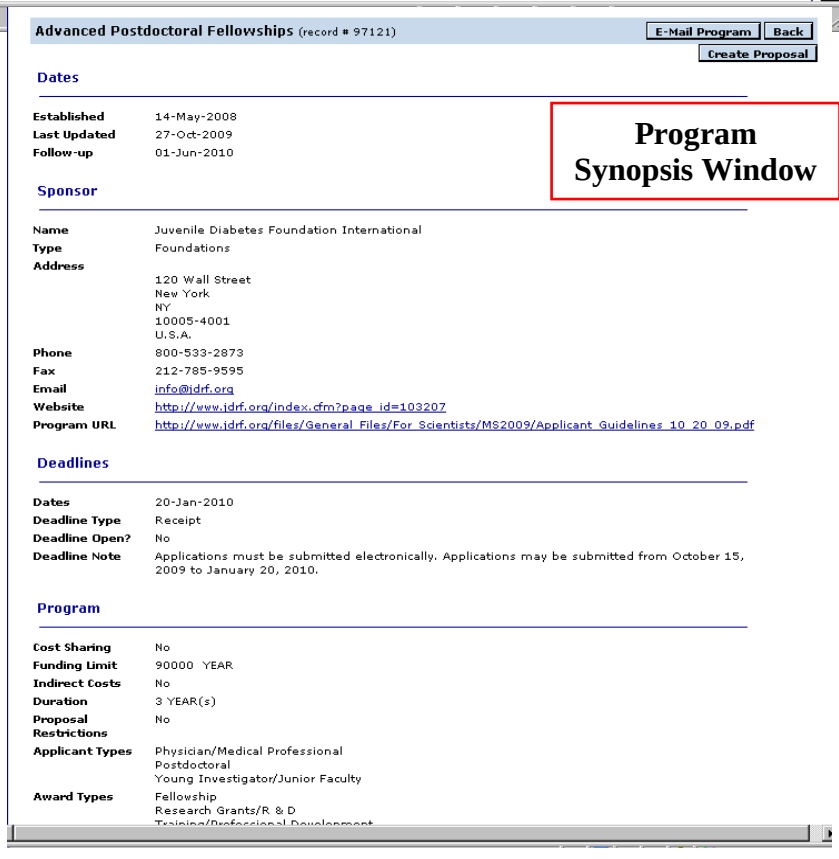


➡ To do a **basic research funding search** on a specific research field, type in the terms you want to search on after "Search SPIN for" (example here = Diabetes), and hit the **Search** button. You will get the window on the next page

- You can search within this window for the opportunities you might be interested in, or start a new search.



- By clicking on the Opportunity you would like to pursue (in this example = Advanced Postdoctoral Fellowships), you will get the **Program Synopsis Window**



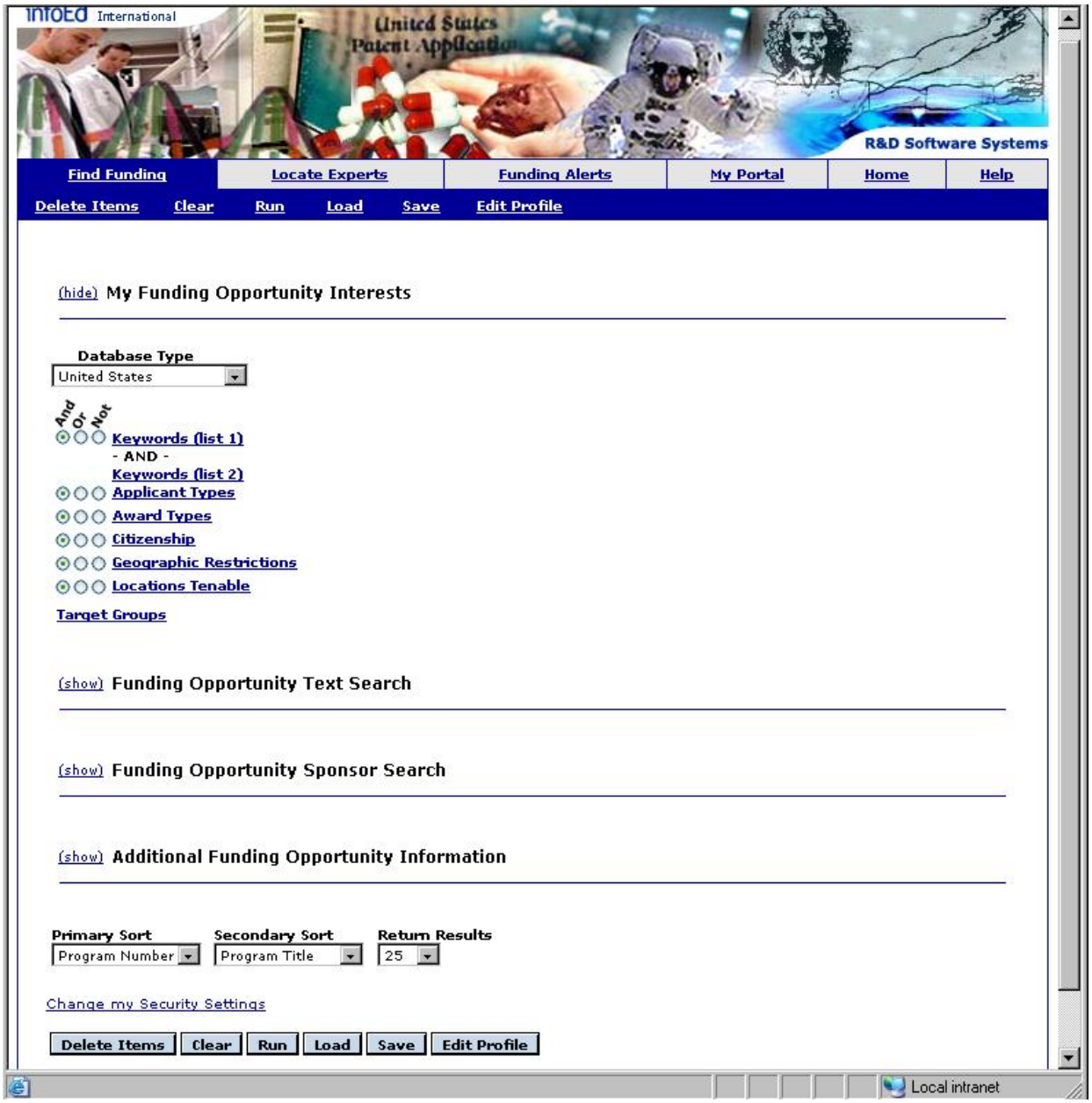
Program Synopsis Window

- If the funding opportunity is the one that can be sent "system to system" in InfoEd (example, the sponsor is NIH, CDC or AHRQ), click on the **Create Proposal** button on the top of the page, and it will take you directly to the *Proposal Development* "Steps" (See Part I – Proposal Development)

- If the opportunity is one you can only submit to Grants.gov as an Adobe forms package, example HRSA grants, then click on the Program URL to obtain the required application, and use the Generic Sponsor option in InfoEd.

- To do an Advanced Search on a specific research field, type in the terms you want to search on after "Search SPIN for" (example here = Diabetes), and hit the **Advanced Search** link.

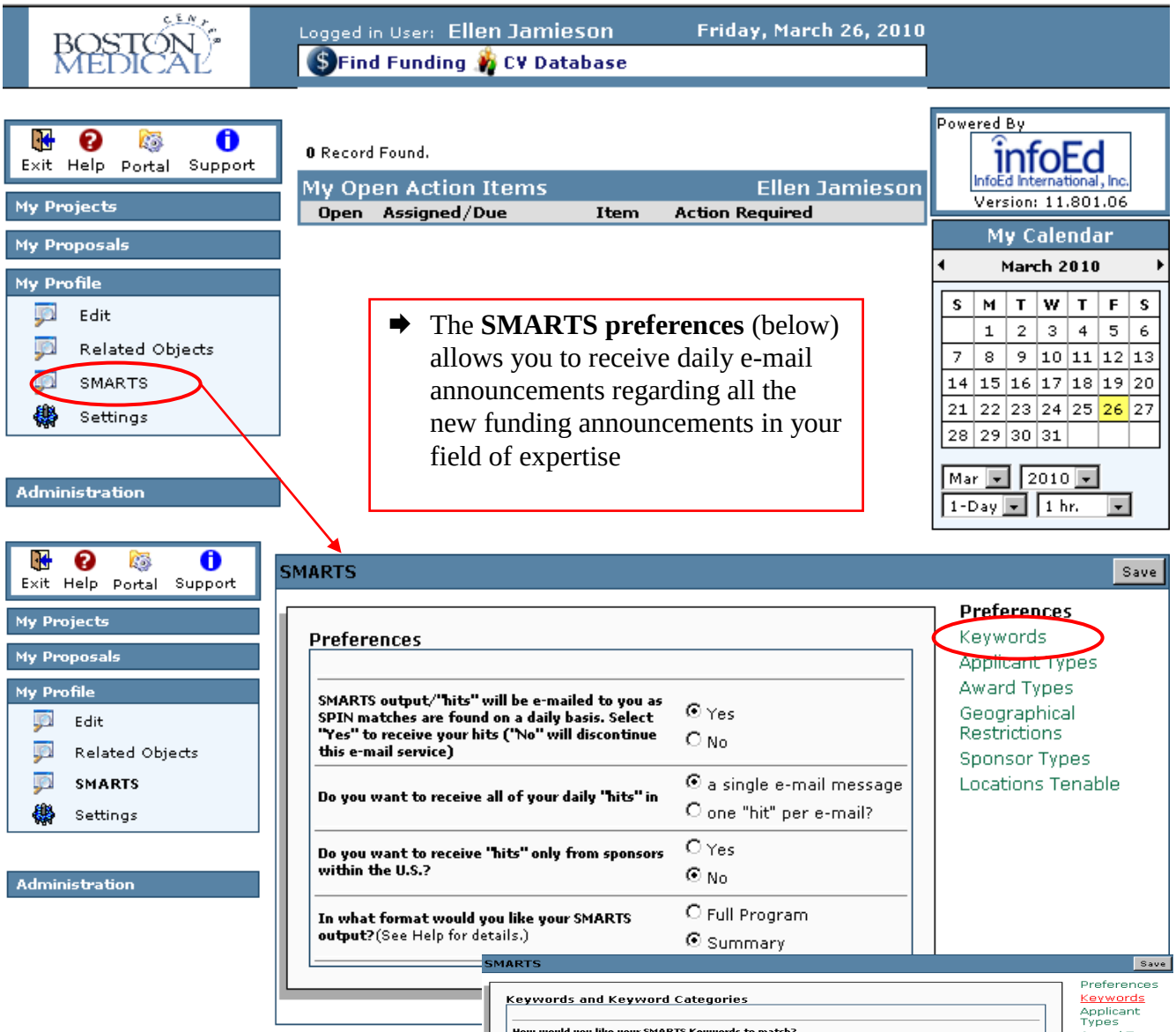
- You will get the window below.

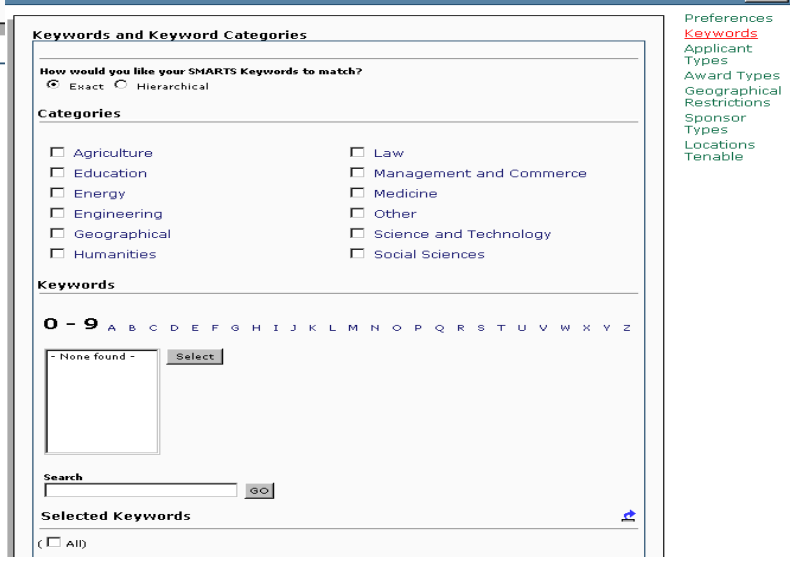


- In this Window, you can narrow down your search by selecting specific criteria for your field of expertise. Once you pick the fields you want, hit the Run button. You will get a list of opportunities—see previous page for example windows.

Funding Opportunity Updates through InfoEd SMARTS

- Notifications of Funding Opportunities can be sent to your e-mail account by using InfoEd SMARTS windows under **My Profile** and selecting **SMARTS**



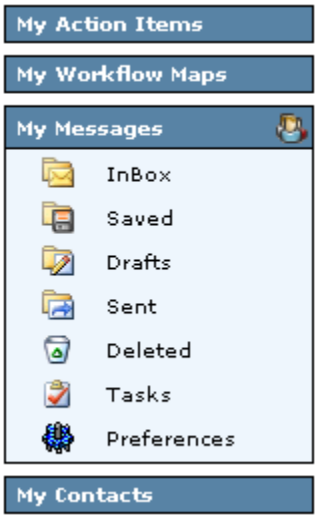


- You can focus on the specific funding announcements in your field of interest by clicking on each of the Preference Categories and choosing the "options" you want narrow your search on. An example of this can be seen in the Keywords window to the right of this text. Once you have selected your categories, hit the Save button.

MESSAGING AND E-MAILS

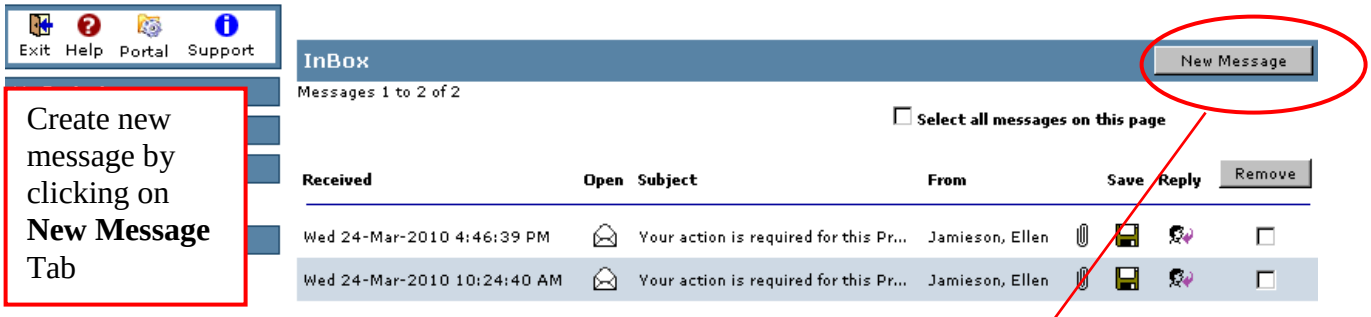
InfoEd also has a message and e-mail system that can be used to communicate with the Grants Office, other Research Collaborators and their staff, and Research Administrators.

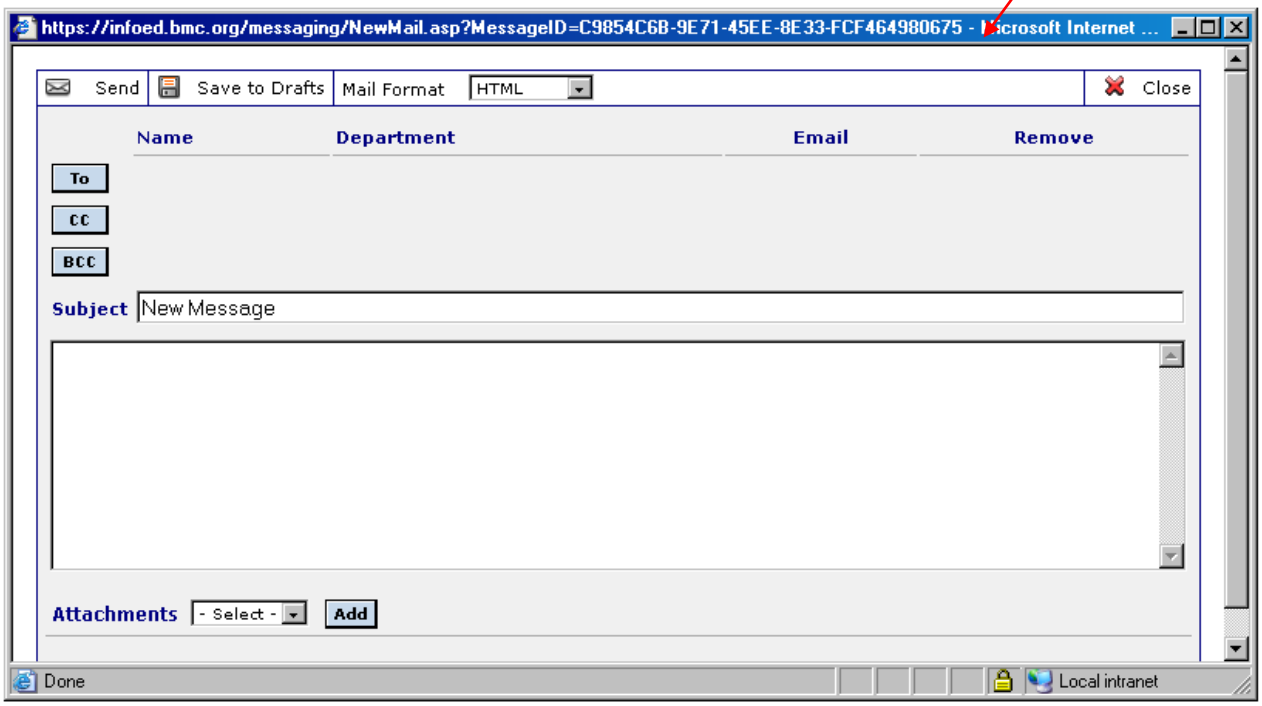
- On the far right of the logged in screen is a bar called My Messages. By clicking on this tab you get the following links: **InBox, Saved, Drafts, Sent and Deleted,** which will connect you to the InfoEd messaging system.



- By clicking on **InBox, Saved, Drafts, Sent or Deleted tabs** you get the screen below. You can either open and read your messages by clicking on the little envelope, or you can create a new message by clicking on the New Message tab.

- You can remove your messages by either selecting each individual message by clicking on the checkbox next to the message, or by clicking on the check box next to "Select all messages on this page" and clicking on the **Remove** button.





- By Clicking on the **To** button you will get the BMC Personnel Alphabetized Directory of all Investigators and Administrators who have profiles in InfoEd (**Figure 1**). Once you have used the drop down menu to select your correspondent, hit the **Select** Button next to the drop down menu, and your message window should now look like **Figure 2**.

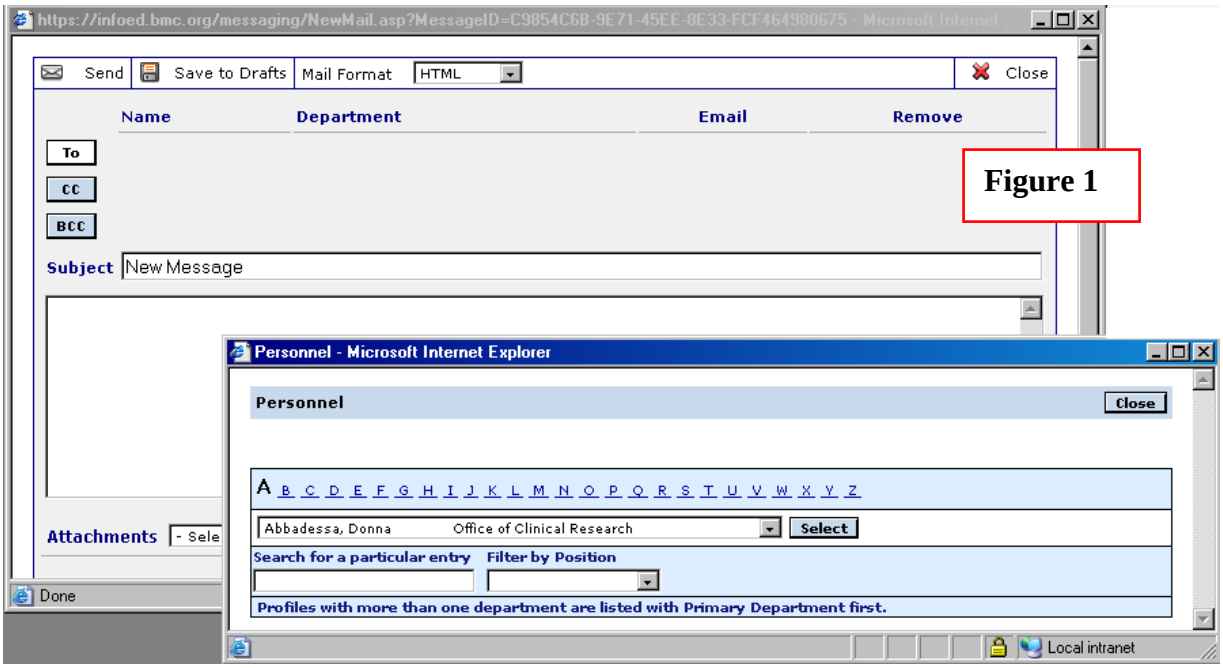


Figure 1

- Please note that the Email checkbox is "checked". If you uncheck this box, the message will not be sent to the recipients outside Email account (for BMC, this is Outlook). You can also upload attachments by clicking on the Add Button. Once you have completed the message, and **Subject** line, hit the **Send** button.

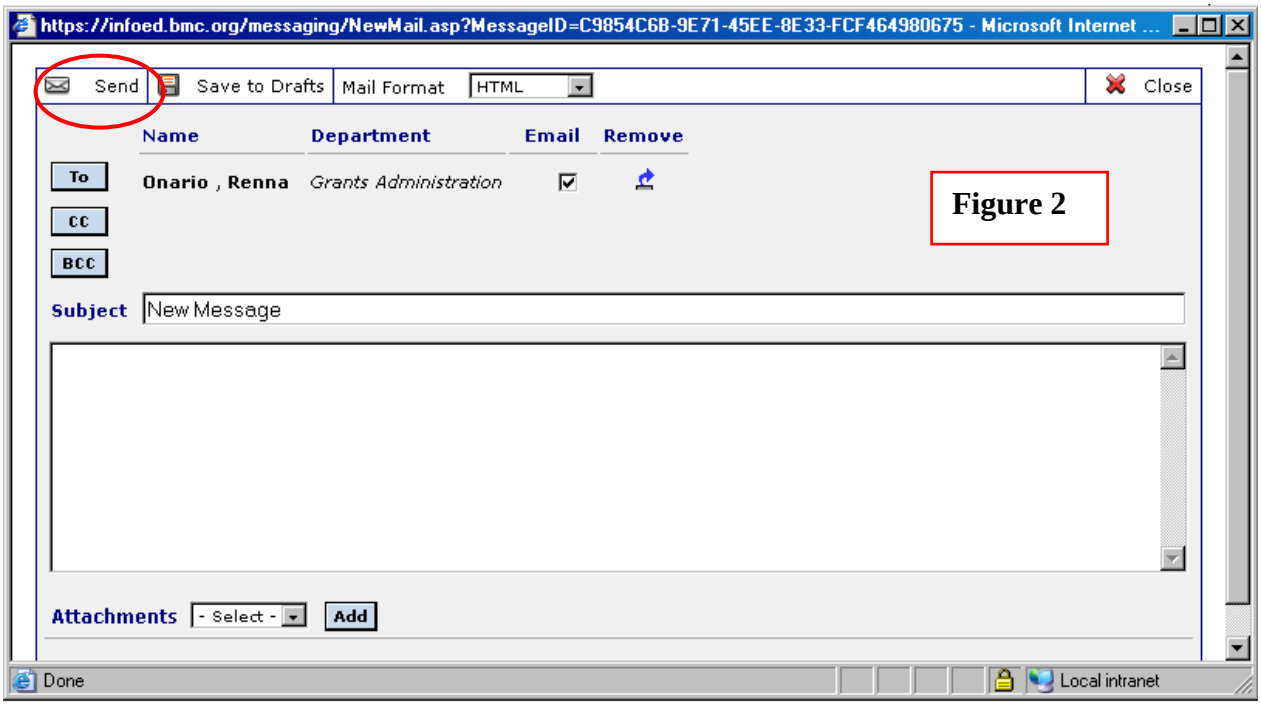


Figure 2