

Accessing or Deleting Previously Created Proposal Records

Browsing for an Existing Proposal Record

Step 1:

- Log on to <https://www.infoed.uconn.edu>, enter your login information, and click the **Proposals** button on the portal navigation panel. You have now accessed the area of the system that houses data pertaining to research proposals. On this screen, you can create a new proposal, browse for an existing proposal or delete an existing proposal.

Step 2:

- If you know the record number for the proposal you are searching for (InfoEd refers to it as “Institution Number”), type it in the text field, click the **Go** button (located next to the text field) and **proceed to step 6**. If you do not know the log number, **proceed to step 3**.

Step 3:

- Notice the row in the middle of the screen entitled “**All Proposals**” and its corresponding **Folder Icon** located under the word “**Open**”. (Note: If you do not see this folder, **proceed to step 6**.) Click the folder icon and **proceed to step 4**.

Step 4:

- You are now at the proposal browse screen, which offers a number of additional search options. If you would like to see a list of all proposals you have access to, simply click the **Go** button next to the words “**Show All**” and **proceed to step 6**.
- If you would like to narrow your search and know any of the information relating to the search options located at the top section of the screen (“Open by Institution Number”, “Open by Account Number”, “Open by Deadline”, “Award Number”), type the information in the appropriate text field, click its corresponding **Go** button and **proceed to step 6**. If you do not know any of this information or would like to **search for your proposal using more general criteria**, **proceed to Step 5**.

Step 5:

- The browse filters located under the blue bar labeled “**Or Apply Filters**” (Sponsor Name, Sponsor Type, Primary Assoc. Dept., Principal Investigator, PI Department, Investigator, Investigator Department) can also be used to search for a proposal. To make use of any of these options, click the corresponding **Set** button and choose the appropriate selection from the alpha-split list that appears in the pop-up window.
- You will now be directed to the previous screen. If you **would like to further refine your search**, **repeat step 5** using any of the remaining browse filters. Finally, to run your search, click the **Go** button located in the blue bar labeled “**Or Apply Filters**”.

Step 6:

- When you see the proposal you are looking for in the **Browse Results** list, click the **View Icon** or **Edit Icon** located under the **PD Brackets (for Proposal Development mode)** or **PT Brackets (for Proposal Tracking/Administrative mode)** on the right-hand side of the screen. You have now accessed the record and can navigate through it using the blue proposal navigation panel on the left side of the screen.

Deleting an Existing Proposal Record

Step 1:

- Log on to <https://www.infoed.uconn.edu>, enter your login information, and click the **Proposals** button on the portal navigation panel. You have now accessed the area of the system that houses data pertaining to research proposals. On this screen, you can create a new proposal, browse for an existing proposal or delete an existing proposal.

Step 2:

- Browse for the proposal using the methods described above in the previous section of these instructions.

Step 3:

- When the record appears, click its **trash can icon**  toward the right side of the screen.

Step 4:

- Click the blue “**Continue**” button