

## General Information for First-Time InfoEd Users



### **Before getting started with InfoEd, please read this section!**

It provides general information about the InfoEd system, and important instructions on updating your computer settings. In most cases, it will be necessary to adjust your computer settings for best results with the InfoEd system.

➔**Profile required:** Each InfoEd user must set up an InfoEd Profile in order to use the system. A username and password will be assigned, and this information should not be shared with anyone. If you do not have a Profile, contact the Office of Research Information for assistance.


➔**Check your internet browser:** InfoEd supports most browsers for Macs and PCs (including Internet Explorer, Mozilla/Firefox, Safari, etc), but settings should be modified for best results with InfoEd.

- Set your browser to refresh with every page. (*In Internet Explorer, click on the Tools Menu, select Internet Options, select Settings, choose "Every Visit to the Page", click okay twice to exit.*)
- Turn off all pop-up blockers. InfoEd uses pop-up windows throughout the system, and these must not be blocked by the browser settings.



➔**Icons:** InfoEd uses many icons throughout the portal. See list attached.

➔**Adobe software:** You will not need the full Adobe Acrobat conversion software. InfoEd converts documents for you into PDF files as they are uploaded, and over 200 formats are supported. However, Adobe Reader is recommended for viewing uploaded documents after PDF conversion. This free software is available at <http://www.adobe.com>.

➔**Save your entries:** In most cases, the InfoEd system does not automatically save your entries for you.

- Use the Save icon  (located in the upper left corner) to periodically save your work. If you forget, you will be prompted to save *before* leaving each page.
- Be patient. At times saving a page may take several seconds. Be sure to wait for your page to refresh after hitting the Save icon before proceeding to the next page. If you do not do so, your entries will not save properly.

➔**Go back, exit, and log out:** Use the icons within InfoEd instead of the buttons on your browser to go back a page, exit, or log out.

- Use the Back icon  to return to the previous page.
- Use the Done icon  to properly exit from the proposal or protocol.


- Don't close the browser. This will get you out of the record, but it will leave the proposal/protocol open (and others may not access it until the system times out).


➡ **Multiple users:** It is possible for more than one person to work on a proposal and/or protocol at the same time. However, only one person at a time may edit a specific section of the proposal/protocol. Others in that section will have view only access to that section.

➡ **Help with InfoEd:** If you have questions or need assistance, please contact the Office of Research Information Management. We may be reached at (305) 243-2314) or by e-mail at [resinfo@med.miami.edu](mailto:resinfo@med.miami.edu). You may also find answers to your questions by clicking on the Help tab on the Main Menu within the module you are using.


## Icons


The following icons are used throughout the InfoEd eRA Portal.


 **Back.** Used in conjunction with each module's Side Bar. Selecting Back will bring the user back (or up) one level in the hierarchy of the item being viewed. At the highest hierarchical level of an item (Summary page, General page, etc.), Back will not appear.


 **Save.** Located in the Stationary Tool Bar ~ commits actions/input completed on the current page.


 **Logout.** Located in the Stationary Tool Bar ~ allows user to exit from the current module.


 **Help.** Located in the Stationary Tool Bar ~ allows the user to access the InfoEd Help System.

 **Support.** Located in the Stationary Tool Bar ~ allows the user to access the Institution Defined Support System.


 **Show/Hide.** Located in the Stationary Tool Bar ~ selecting this will reveal field level help.

 **Field Help.** Located in the Stationary Tool Bar ~ when Show has been selected, for Field level Help, these icons appear next to each field. Placing the cursor on these icons will activate a popup description of the field.


 **Admin Help Unlock/Lock.** Located in the Stationary Tool Bar ~ this icon is shown for Module Administrators only. Selecting this icon will reveal/hide the field level help administration system.


 **Open.** Used throughout the system ~ allows users to open designated items in detail.


 **Unread Message.** Used within Messages ~represents an unopened message.


 **Read Message.** Used within Messages ~represents a message that has been opened.


 **Unopened Task.** Used within Message, Tasks ~ represents an unopened task.


 **Opened Task.** Used within Message, Tasks ~ represents a task that has been opened.

 **Reply.** Used within the system to reply to the sender of the message within the Message InBox or from within the modules.


 **Reply to All.** Used within the system to reply to the all listed on the message within the Message InBox or from within the modules.

 **Next.** Used within the Messaging system to allow the user to move thru unread items in the message box without opening each item individually.

 **Previous.** Used within the Messaging system to allow the user to move thru unread items in the message box without opening each item individually.

 **Forward.** Used within the system to forward messages within the Message InBox or from within the modules.

 **Message Close.** Used within the Messaging system to allow the user to close the message detail pop up box.


 **Attachment.** Indicates an attachment is included with the Message.

 **View.** Will open the corresponding item in read only mode.


 Represents a PDF Document within the system.

 **Replace.** Indicates that the replace functionality may be used.

 **Profile.** Used within the Clinical Trials Personnel section, this item grants view into the contact information for the designated individual.

 **Edit.** Open any corresponding form or screen in Edit format, if security level permits.

**X** Used throughout the system in columns where the listed functionality is not available.


 **Go.** Saves the selection made and moves forward appropriately.


 **Upload.** Upload documentation to the module.

[Open Word Links](#). These links are used throughout the system in place of visual icons.

## Remove and Delete

In order to give the user a clear understanding of eliminating items from the system ~ the term "Delete" has been split into two distinct functionalities.

 **Delete.** When the delete icon is shown ~ this indicates to the user that the item represented, if this button is clicked, will be completely eliminated from the system.

 **Remove.** When the remove icon is shown ~ this indicates to the user that the item represented, if this button is clicked, will only be disassociated from the current item. The item will remain within the system for future associations.