

InfoEd Reviewer Dashboard Reference Guide

***Important:** If you are completing a review from home or off the Clemson network, you must first establish a VPN Connection (<https://cuvpn.clemson.edu>) to reach the reviewer dashboard.

As an approval step on an InfoEd proposal submission route, you will be presented with a reviewer dashboard to view and approve the various elements of the proposal submission. The first indication that your review and approval is required will be an email similar to the one below.

From: Sysadmin, InfoEd <dharri2@clemson.edu>
To: Daniel Harris
Cc:
Subject: Proposal Submitted - Your Approval Required

Please review the proposal listed below by clicking the Reviewer Dashboard link.

Investigator: InvestigatorTEST Tester
Department: Test Department
Sponsor Deadline Date:
Proposal No: 2014000192
Proposal Title: dh test 2/19/14 5

Reviewer Dashboard: [Reviewer Dashboard](#)

Step 1

- **Click on the Reviewer Dashboard link in the email.** A window will open displaying the reviewer dashboard itself.
 - If prompted to log in, please use your Clemson University username and password

Step 2

- **Click on the Review tab**

HELP

You have been identified as someone who needs to perform an On-line Review. The "Review Dashboard" allows you to:

- "See Comments" others have made when they reviewed this item
- "Add Comments" to this item
- Indicate "Your Decision" on the Review of this item
- See the "Routing Progress" that this item has/will take

REVIEW

Many of the items being reviewed have deadlines, so please act accordingly. In order to access this information, you will need to be logged in. If you are unsure of your username/password please click [here](#).

1. Review the items listed on the "Review" tab, marking each item "Reviewed" when you have completed your review of it. Note that "Not Applicable" may be an option and if so, you may select that instead of "Reviewed" when appropriate. No item can be left "Un-Reviewed" to continue.
2. Add any comments to the PI, reviewers, administrators or all viewers as appropriate and click the SAVE icon.
3. Select a value in the "Decision" menu. You may be prompted to acknowledge specific representations and certifications. You must "Accept" these in order to proceed if presented. Click the SAVE icon to confirm your decision and complete your review.

ROUTE

If you intend to "Add Comments", you should do so before you set your decision. Once you set your decision and save, you will not be able make any additional changes, i.e. "Adding Comments" or changing "My Decision" after your decision is saved.
If you have any questions regarding your involvement in this process, or what is expected of you please contact:

InfoEd Sysadmin

Once you have opened the review tab, you will be presented with the screen below. This screen consists of:

- Elements of the proposal to review – to review each element click view (or edit if your access allows)
- Comments – text entered here will be displayed to the applicable groups in both the upper right corner of the reviewer dashboard as well as the route status page of the Proposal Development record
- Decision – Either approved or return for corrections

HELP

REVIEW

ROUTE

Proposal - Initial Application

Number: 2014000192
Title: dh test 2/19/14 5
Sponsor: Abbeville County
Submitted:

Comments I can see...

No Comments have been recorded

Form Name/Category	Current Submission		Reviewer Action		
	Submitted	Open	Un-Reviewed	Reviewed	Not Applicable
dh test 2/19/14 5 <i>(Proposal)</i>	19-Feb-2014 12:10:33 PM	View Edit	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Export Control 10-15-2013 <i>(Supporting Documents)</i>	19-Feb-2014 12:11:27 PM	Edit	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cost Share/F&A Waiver/PI Variance	19-Feb-2014 12:11:27 PM	Edit	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Budget <i>(Internal Budget)</i>	19-Feb-2014	N/A	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Add Comments:

To be shared with everyone

Between you and the PI

Between Reviewers Only

Between you and Admins

My Decision is:

Step 3

- Click the View button for each element of the proposal
- Select the “Reviewed” or “Not Applicable” radio button for each element
 - You will not be able to record a decision if any element is left as “Un-reviewed”.
 - You may also leave comments in the applicable section if you choose (see Comments bullet above)

Reviewer Action		
Un-Reviewed	Reviewed	Not Applicable
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Step 4

- Click the save icon in the upper right corner of the dashboard

Save your data or it will not be recorded... 

Comments I can see...

No Comments have been recorded

You may then enter your review decision. A selection of **Approved** will send the review to the next step of the route for approval.

A selection of **Return for Corrections** will send a preset email to the PI and grant administrator notifying them that corrections are needed. Specific concerns/corrections should be communicated through the comments section or sent to the PI and grant administrator directly.

- Once the corrections have been made, the route will start again from the beginning, and you should see another email containing a link to the reviewer dashboard once your step has been reached.

Step 5

- Enter your Decision

My Decision is:

▼

Approved

Return for Corrections

Continued on next page


After recording a decision, if you are the proposal's PI, Co-Investigator, PI or Co-I's Chair or Associate Dean for Research, you will be presented with certification text that you must agree to in order to approve the review.

Step 6

- **Accept certification Text**

Step 7

- **Click the save icon once more to complete your review.**

Save your data or it will not be recorded... 

Comments I can see...

No Comments have been recorded