

# **Creighton University – InfoEd**

# InfoEd User Access Guide

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If you need help accessing InfoEd or need a profile created contact the Research Compliance Office at:

Phone: 402-280-3074

Email: <u>researchcomped@creighton.edu</u>.

## 1. Creighton University Employees and Students – Accessing the InfoEd Research System

Step 1: Go to <u>https://creighton.infoedglobal.com</u>
Step 2: Select the Click Here
Step 3: Sign in using the Creighton University single sign on page

Select the **Click Here** to log in with your Creighton credentials.



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Login		 1		1			
Username				- 1		1 1	I
Password							
Click Here to log in with your		_					
creighton credentials	_						
Sign In		 					
Having trouble logging in?	+ + +	 	-		-	+ +	-
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Use the Creighton University single sign on by entering your blue username and password.



## 2. Creighton SOM Faculty and External Users – Accessing the InfoEd Research System

Step 1: Go to <u>https://creighton.infoedglobal.com</u>
Step 2: Using the Login boxes enter in your assigned username and password.
Step 3: Select the Sign In button

For CHI employees, Creighton SOM faculty and External users use your assigned username and password within the Login boxes and select Sign in.



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# 3. Locate a Record

Records can be found using three different options Locate My Records and Locate Records tabs and the Quick Find box.

Home My Profile	Locate My Records	Locate Record	s Calendar	Messages	Assignments		Quick Find
Sponsored Projects	Result	s found: 1		Switch O	wner You 👻		Export to Excel
Financial Tracking	Drag	a column header and o	drop it here to gro	up by that column			
Human Protocol		Record Type	Record Number	Record Owner / Pl	Record Status	Record Title	
Conflict of Interest		Human Subjects	2002055	Test, Password	in Development	New Protocol Created for Passwor Mar-2021 10:07 AM	d Test on 29-

## 3.1: Locate My Records Tab

Locate My Records will provide a listing of all records on which you are the principal investigator.



**Step 1:** Select the Locate My Records from the top toolbar. All record numbers with you as the owner/PI will be listed.

Creighton						v13 Portal Welcon	ne Password Test Logout
Home My Profile	Locate My Record	Locate Records	a Calendar	Messages	Assignments		Quick Find
Sponsored Projects	Resul	ts found: 1		Switch 0	wher You v		Export to Excel
Financial Tracking	Drag	a column header and d	rop it here to grou	p by that column			
Human Protocol		Record Type	Record Number	Record Owner / Pl	Record Status	Record Title	
Conflict of Interest		Human Subjects Protocol	2002055	Test, Password	In Development	New Protocol Created for Password Test on 29- Mar-2021 10:07 AM	
SPIN							

## 3.2: Locate Records Tab

Locate Records is a search function to locate records by completing a search.

reighton						via Portal   Welo	ome Password Test Logod		
Home My Profile	Locate My Record	Locate Record	s Calendar	Messages	Assignments		Quick Find		
Sponsored Projects	Resul	ts found: 1		Switch O	wher You 🖂		Export to Excel		
Financial Tracking	Drag	Drag a column header and drop it here to group by that column							
Human Protocol		Record Type	Record Number	Record Owner / Pl	Record Status	Record Title			
Conflict of interest		Human Subjects Protocol	2002055	Test, Password	In Development	New Protocol Created for Pass Mar-2021 10:07 AM	word Test on 29-		
SPIN									

Follow steps below to search for all records on which you are listed as a personnel.

- Step 1: Select the Locate Records from the top toolbar.
- **Step 2:** Select the Human Protocol check box.
- **Step 3:** Select the Record Personnel check box.
- **Step 4:** Enter in your name within the Record Personnel box.

All record numbers with you as personnel will be listed.

Select 'Locate' Criteria				Help Close
Modules available for searching a	cross:			
Account	-Award	External Herest Human Protocol		
Safety Protocol	Sponsored Pro	ject		
Available fields to sea	rch by		4 Selected fields	Search
Ptimary Sponsor		Record Owner Primary Department	Record Personnel	1
Projed Status		3 Record Personnel	Profile, Test - Departme	
Record Associated De	partments	Record Personnel Department		
Record Classification	Codes	Record Primary Department		
Record Creation Date		Record Primary Sponsor Type		
Record Key Words		Record Status		
Record Number		Record Title		
Record Owner / Pl				



## 4. Home Tab Setup

The Home tab is your InfoEd main page with access to all InfoEd widgets which are configurated through the Portal Configuration button.

**Step 1:** Select the Portal Configurations button

**Step 2:** Using the Login boxes enter in your assigned username and password. **Step 3**: Select the Sign In button

O in	oEd					vt3 Potal	Welcome Sarah Taylor Logout
Horse	My Profile	Locate My Records	Locate Records	Calendar	Messages	Things to Do	Questions P
Seons	ored Projects						Portal Configurations
Finan	al Tracking						
Huma	Protocol						
9PN							

In the Portal Configuration screen, you can select widgets that you would like to see on your Home tab and how they will be displayed. The Research Compliance Office recommends, you configure the following.

- **4.1:** Messages and Assignments should be enabled.
- **4.2:** Bookmarks can be used to bookmark protocols.
- **4.1:** WorkFlow Maps are used to follow your protocol flow within InfoEd.

Portal User Preferenc	es				Save
Double Widgets			Available Widgets		
Widget Name		Enable/Disable	Widget Name	Infoed	Third Party Institution
Messages		Enable 🗸	Bookmarks	Use	Yes
Assignments		Enable 🗸	EN⊺ - Meeting Calendar	Use	Yes
SPIN		Enable 🗸	Messages Widget	Use	Yes
			My Projects	Use	Yes
			SMARTS <sup>™</sup> Notifications	Use	Yes
			SPIN Bookmarks	Use	Yes
			SPIN™ Custom Funding Opportunities	Use	Yes
			System Messages	Use	Yes
			Things to Do Widget	Use	Yes
			Up-and-Coming Reviews	Use	Yes
			WorkFlow Map	Use	Yes
Left Column Widgets			Right Column Widgets		
Widget Name	Sequence	Switch Column	Widget Name	Sequence	Switch Column
Instructions	+	•	Records I am Named On		+
COL - Annual Disclosure	<b>•</b>	-			



## Widget choices:

## Messages:

Displays system emails which are sent to the email address listed in the My Profile tab.

#### Assignments:

Displays all items that require action by you. This will include protocol submissions sent back to you from an IRB Administrator.

#### Workflow Map:

Workflow maps are a visual representation of where your protocol submission is in the IRB approval process.

#### **Records I am Named On:**

Displays all records which you are listed as personnel.

#### **Up-and-Coming Reviews:**

Displays protocol submissions in routing.

#### Bookmarks:

Bookmarks allow you to bookmark a chosen protocol to your Home Tab for quick access.