

IRES Enable Portal Transition

**Please be advised there may be some slight variations between screen displayed in this Help Guide versus what you will see on your personalized screens in IRES. This is due to differences in security settings within IRES and will not affect your ability to complete tasks in the enabled portal. * For any additional questions please contact OSP.*

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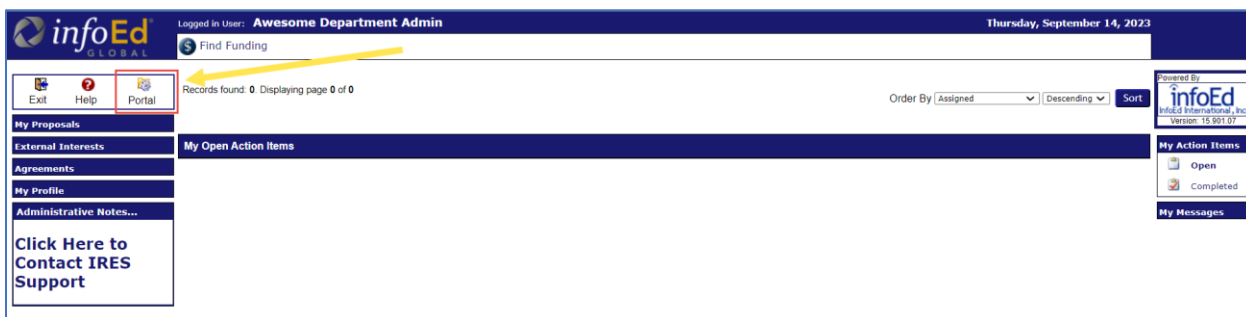
IRES Enable Portal Transition

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Toggle Between Portal Versions

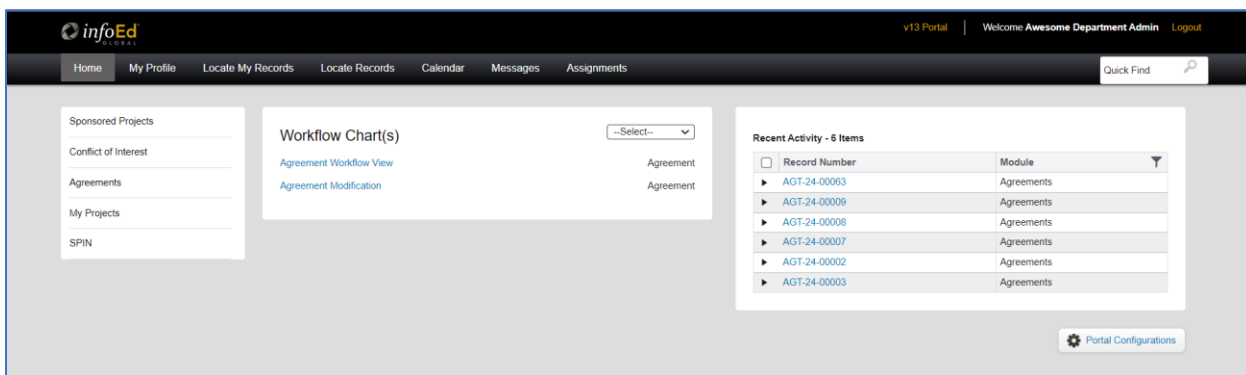
How to Change from the v13 Portal to the Enable Portal

1. In the upper left corner, click the Portal icon.



2. The view will change to the Enable Portal.

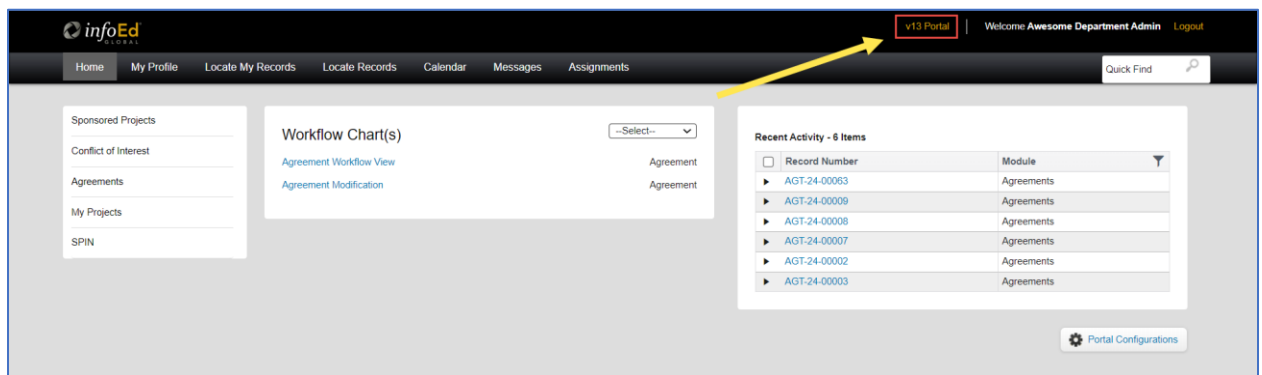
Note: you may have different content in the middle of the screen depending on your Portal Configurations.



How to Change from the Enable Portal back to the v13 Portal

1. In the upper right corner, next to your name, click the v13 Portal link.

IRES Enable Portal Transition

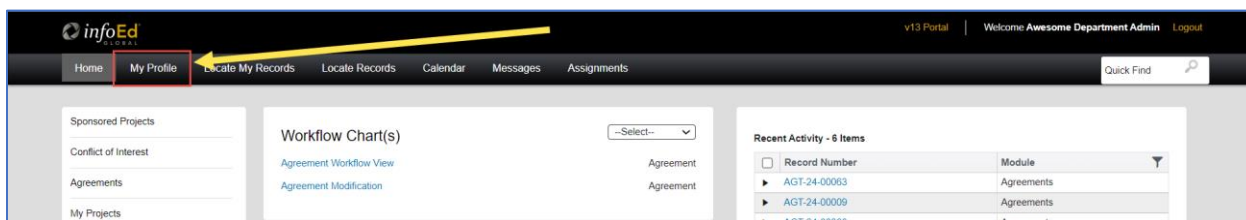


2. The portal will switch back to the old layout.

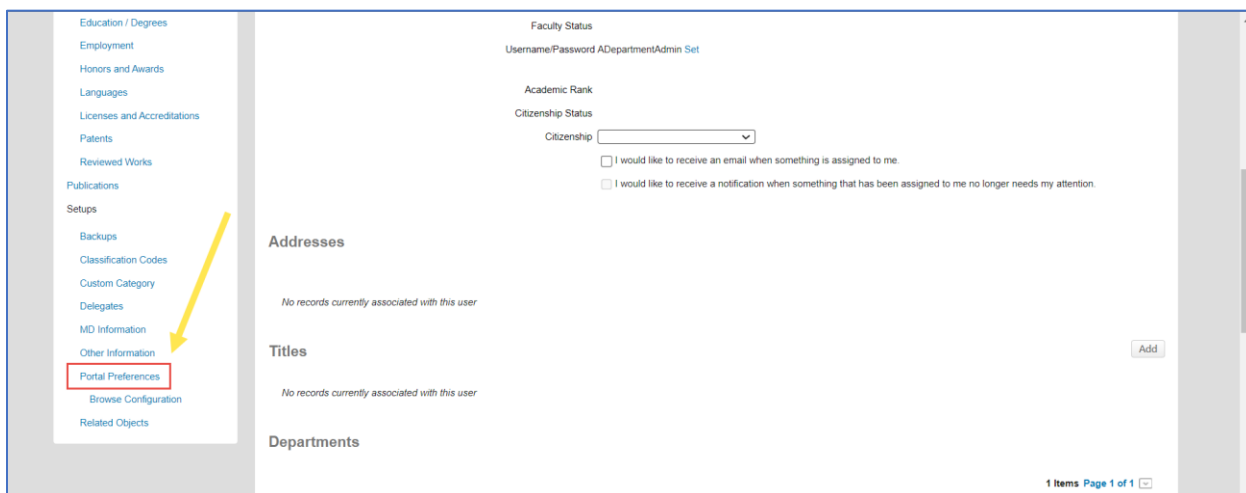
Note: that this portal will be decommissioned for everyone by January 1, 2024.

How to Make the Enable Portal the Default

1. From the Enable (new) Portal, in the top bar on the left, click My Profile.



2. On the left sidebar, scroll towards the bottom, and click on Portal Preferences.



3. Scroll down to Portal Preferences. Next to "Default Portal: Set Portal you see on login", click the radio button next to Enable Portal. Then click the Save button.

IRES Enable Portal Transition

Appointments
Collaborators
Memberships
Research Interests
Resources
Sponsor Credentials
Sponsored Funding
Biography
Advisees
Associations and Societies
Biobio
Courses Taught
Creative Activities
Education / Degrees
Employment
Honors and Awards
Languages
Licenses and Accreditations
Patents
Reviewed Works
Publications
Setups
Backups
Classification Codes

Contact Preferences: Make these Contacts available Add

No records currently associated with this user

Sponsor Preferences: Make these Sponsors available Add

No records currently associated with this user

Profile Preferences

Default Portal: Set Portal you see on login Enable Portal v13 Portal

I would like to receive an email when something is assigned to me. Yes No

Sort assignment list by: Due Date Assigned date Oldest to Newest

Default number of assignments to display: 25

In addition to institutional (local) searches, would you like your profile to be available for searching on GENIUS' global network? Yes No

When your profile information turns up as a "hit" in GENIUS searches, should prospective partners/collaborators contact you directly, or make initial contact with your institutional administrator? Direct Contact Administrator Contact

Save

Home Screen

Current IRES Portal

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>

1. Screen will load to display open action items automatically.

infoEd GLOBAL

Logged in User: Find Funding

Wednesday, July 19, 2023

Records found: 5. Displaying page 1 of 1

Order By: Assigned Descending Sort

Powered By: infoEd InfoEd International, Inc. Version: 15.001.07

My Projects
My Proposals
External Interests
My Profile
Administrative Notes...
Click Here to Contact IRES Support
Administration

My Open Action Items

Your action is required Proposal - 23-004615 PI: Li, Chung-Jung (MEDNEU Neurology Neuroscience CC0836) Title: Do LSD genes confer risk for PD? Open Action Items: 0	Status: In Review Submission Type: Initial Application Assigned: 21-Feb-2023 5:25:53 AM Item Type: Dashboard
Your action is required Proposal - 23-004751 PI: Lowell, Amanda (MEDCSC Young Child CC0999) Title: A Type I Hybrid Effectiveness-Implementation Trial of "Mothering from the Inside Out" (MIO) Open Action Items: 0	Status: In Review Submission Type: Initial Application Assigned: 20-Feb-2023 3:15:39 PM Item Type: Dashboard
Your action is required Proposal - 23-004424 PI: Rumper, Brooke (MEDCSC Formative Childhood-Policy and School Development CC1696) Title: Dynamic Discourse of Dual Language Learners (DLLs): Leveraging Technology to Examine Classroom Language Experiences of DLL Children Open Action Items: 0	Status: In Review Submission Type: Initial Application Assigned: 20-Feb-2023 8:38:56 AM Item Type: Dashboard
Your action is required Proposal - 23-004647 PI: Sansing, Lauren (MEDNEU Stroke CC0844) Title: REpeated ASseSsmEnt of SurvivorS in ICH (REASSESS ICH) Federal Clinical Trial Open Action Items: 0	Status: In Review Submission Type: Initial Application Assigned: 15-Feb-2023 4:57:13 PM Item Type: Dashboard
Your action is required Proposal - 23-004330 PI: North, Paul (FASGER German CC0557) Title: Max Kade Visiting Professorship - Lemke Open Action Items: 0	Status: In Review Submission Type: Initial Application Assigned: 13-Feb-2023 9:00:16 AM Item Type: Dashboard

My Calendar
July 2023

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Jul 2023
1-Day 1 hr

My Action Items

Open
Completed

My Workflow Maps
My Messages

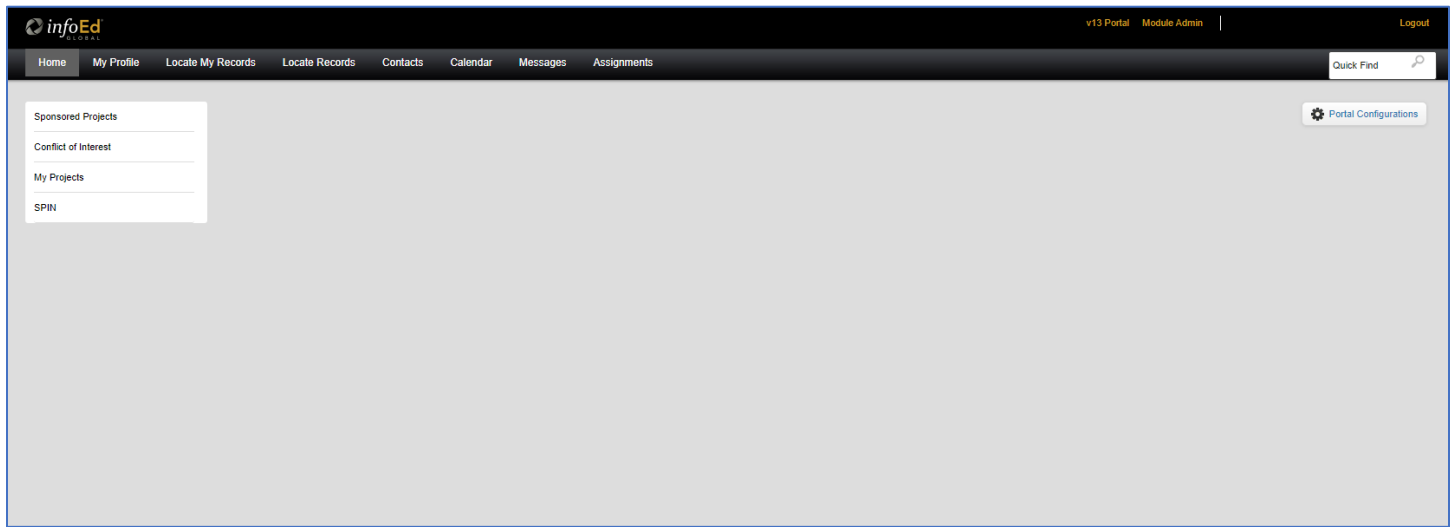
2. "My Action Items" is also found in the bottom right navigation pane of home screen.
3. User is able to select Open or Completed Action Items.

Enabled IRES Portal

IRES Enable Portal Transition

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>

1. Screen will load to display top and left navigations; these are described in upcoming sections.



Note: Users have the ability to change this screen so action items can be seen upon login. For information on updating your enables portal home screen please review [How to Change Your Portal Configuration](#).

My Messages

Current IRES Portal

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>

1. “My Messages” is located on right side navigation under Calendar.
2. To Open, click “My Messages”.
 - a. Once clicked a dropdown automatically expands showing available mailboxes.



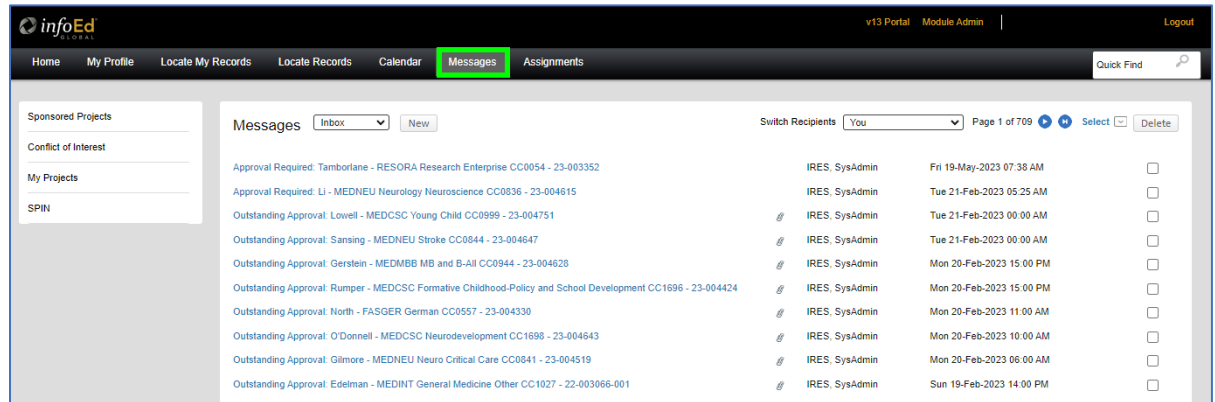
Enabled IRES Portal

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>

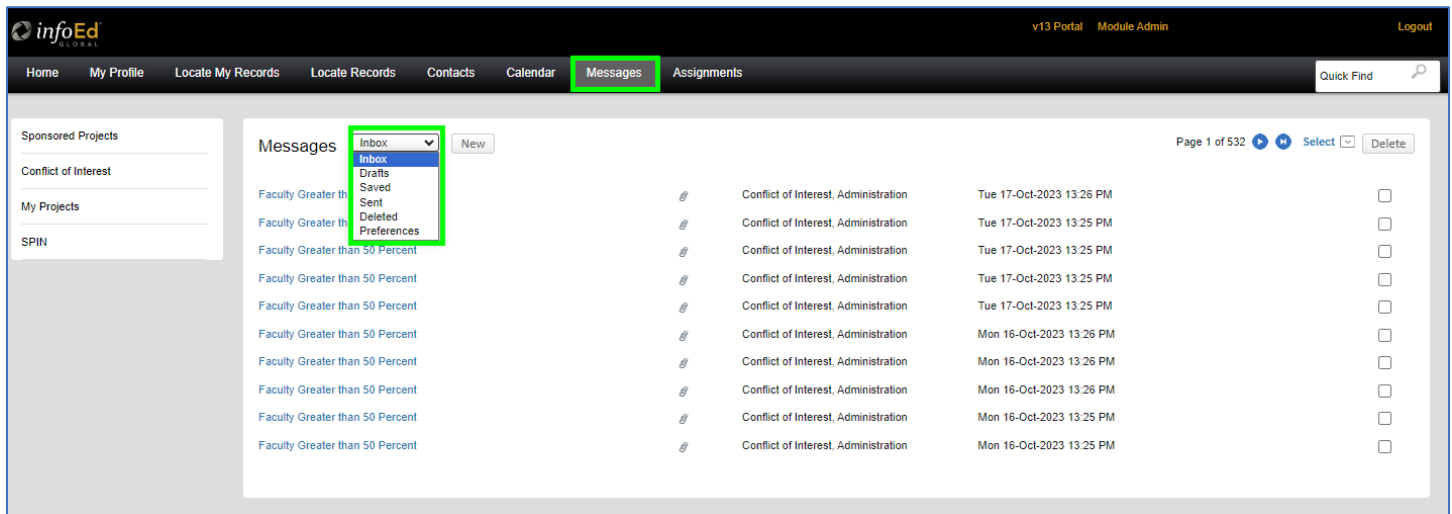
1. “Messages” is now located in top navigation bar on main screen after successful log in.
2. To Open, click “Messages”.

IRES Enable Portal Transition

- a. Once clicked main inbox will display.



- b. A dropdown is available on this screen to access additional mailboxes.



Assignments

Current IRES Portal

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>

1. Currently loads as main screen when successfully logged into IRES.
 - a. Can also be found under Calendar under “My Action Items.”
 - b. Divided as “Open” or “Completed”.
 - c. User has ability to toggle between open or completed assignments.

IRES Enable Portal Transition

infoEd
Logged in User: Find Funding Thursday, July 20, 2023

Records found: 5. Displaying page 1 of 1

Order By: Assigned Descending Sort

Powered By infoEd
InfoEd International, Inc.
Version: 15.901.07

My Calendar
July 2023

My Action Items
Open
Completed

My Workflow Maps
My Messages

Enabled IRES Portal

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>

1. Still present on home screen after successful log in to IRES.
2. “My Action Items.”; now called “Assignments” it is also located in top navigation bar.

infoEd
v13 Portal Module Admin Logout

Home My Profile Locate My Records Locate Records Calendar Messages Assignments Quick Find

Sponsored Projects
Conflict of Interest
My Projects
SPIN

Assignments
Open Your action items

Module	Record Number	Record Owner	Object	Assignment Type	Record Status	Subject	Assigned
Proposal Tracking	23-004330	North, Paul	Initial Application	Dashboard	In Review	Your action is required	13-Feb-2023 9:00:16 AM
Record Details:							
Record Title		Max Kade Visiting Professorship - Lemke					
Item Type		Dashboard					
Assigned Date		13-Feb-2023 09:00 AM					
Open Items		0					
Body of workflow instruction							
Proposal Tracking	23-004647	Sansing, Lauren	Initial Application	Dashboard	In Review	Your action is required	15-Feb-2023 4:57:13 PM
Record Details:							
Record Title		REpeated ASseSsmEnt of SurvivorS in ICH (REASSESS ICH) Federal Clinical Trial					
Item Type		Dashboard					
Assigned Date		15-Feb-2023 04:57 PM					
Open Items		0					
Body of workflow instruction							

PD/PT

Current IRES Portal

LOCATE PERSONAL RECORDS

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>

1. Click on My Proposals in left navigation pane.
2. Click Show/List.
3. Once screen re-loads available personal records will display.

IRES Enable Portal Transition

The screenshot shows the IRES portal interface. At the top, the 'infoEd' logo is on the left, and 'Logged in User:' is on the right. Below the logo is a 'Find Funding' button. The left sidebar contains navigation links: 'My Projects', 'My Proposals', 'Show/List', 'Search For', 'Create New Proposal', 'Create New PT Record', 'Ad Hoc Reports', 'Standard Reports', 'Help - PD Icon', and 'Help - PT'. The main content area displays search results for a proposal. A table with the following columns is shown: Institution Number, Title (PI), Proposal Type, Legacy Number / Award Number, Requested Period, Awarded Period, Sponsor Department, and Info. The table contains one row with the following data: Institution Number 23-004253, Title (PI) Test Murphy, Sharon E, Proposal Type New, Legacy Number / Award Number /, Requested Period 01-Jul-2023 - 30-Jun-2024, Awarded Period, Sponsor Department National Institutes of Health/DHHS RESORA Office of Sponsored Projects CC0051, and Info. The table is labeled 'Showing Page 1 of 1 (1 Proposals Found)'.

CREATE NEW RECORD

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>

4. Click on My Proposals in left navigation pane.
5. Click Create New Proposal.
6. Once new pop-up loads follow prompts to create and complete new proposal.

The screenshot shows the 'New Proposal Questionnaire' page. The left sidebar is the same as the previous screenshot. The main content area displays the 'New Proposal Questionnaire' form. The form has two steps: Step 0: Confirm you intend for the PI of this proposal to be Murphy, Sharon E Change. Step 1: Create a 'New' Proposal. The form has a 'Continue' button. The right sidebar contains a calendar for July 2023, a 'My Action Items' section, a 'My Workflow Maps' section, and a 'My Messages' section. The top right corner shows the date 'Wednesday, July 19, 2023'.

CREATE NEW PT RECORD

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>

1. Click on My Proposals in left navigation pane.
2. Click Create New PT Record.
3. Once new pop-up loads click continues to create and complete new PT Record.

IRES Enable Portal Transition

The screenshot shows the infoEd portal interface. On the left is a navigation pane with sections: My Projects, My Proposals (containing Show/List, Search For, Create New Proposal, Create New PT Record, Ad Hoc Reports, Standard Reports, Help - PD Icon, and Help - PT), External Interests, My Profile, and Administrative Notes... (with a link to contact IRES Support). The main content area is titled 'Create' and contains a 'New Proposal' button. A 'Continue' button is also visible. The right sidebar includes a calendar for July 2023, My Action Items, My Workflow Maps, and My Messages. The top of the page shows the user is logged in and the date is Wednesday, July 19, 2023.

SEARCH FOR RECORD

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>

1. Click on My Proposals in left navigation pane.
2. Click Search for.
3. Once screen re-loads complete required sections to locate record via system search.
4. Click Locate.

The screenshot shows the 'Proposals - Search For' window in the infoEd portal. The window has a search form with fields for Proposal number, Legacy Number, Sponsor/Scheme, Proposal Status, PI, Primary Assoc Dept, and Department Name. There are 'Locate' and 'Clear All' buttons. The left navigation pane is the same as in the previous screenshot. The right sidebar also remains the same. The top of the page shows the user is logged in and the date is Wednesday, July 19, 2023.

Generating Reports

AD HOC REPORTING

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>.

IRES Enable Portal Transition

1. Click on "My Proposals" in the left-sided navigation.
2. Click on "Ad hoc Reporting".
3. Once the screen loads, complete reporting criteria then click "Get"

Reporting Tool - Google Chrome

https://infoed-gold.its.yale.edu/Trials/ReportsMain.asp?Mode=PT5&system=PT&ADHOC=1

Reporting Tool for Proposal Tracking

Save Get Forward Import/Export Help

Simple Chart/Graph

☒ Include Title ☐ Include Date/Time

GR - In Review In Development

Query Criteria	Condition	Value	
Current Proposal Status	=	Lookup In Development	Remove
Current Proposal Status	=	Lookup In Review	Remove
Include Non-Reportable Records	=	Yes	Remove
Include Child Submissions	=	Yes	Remove
Reviewer - Names	=	Lookup Sharon Murphy E	Remove

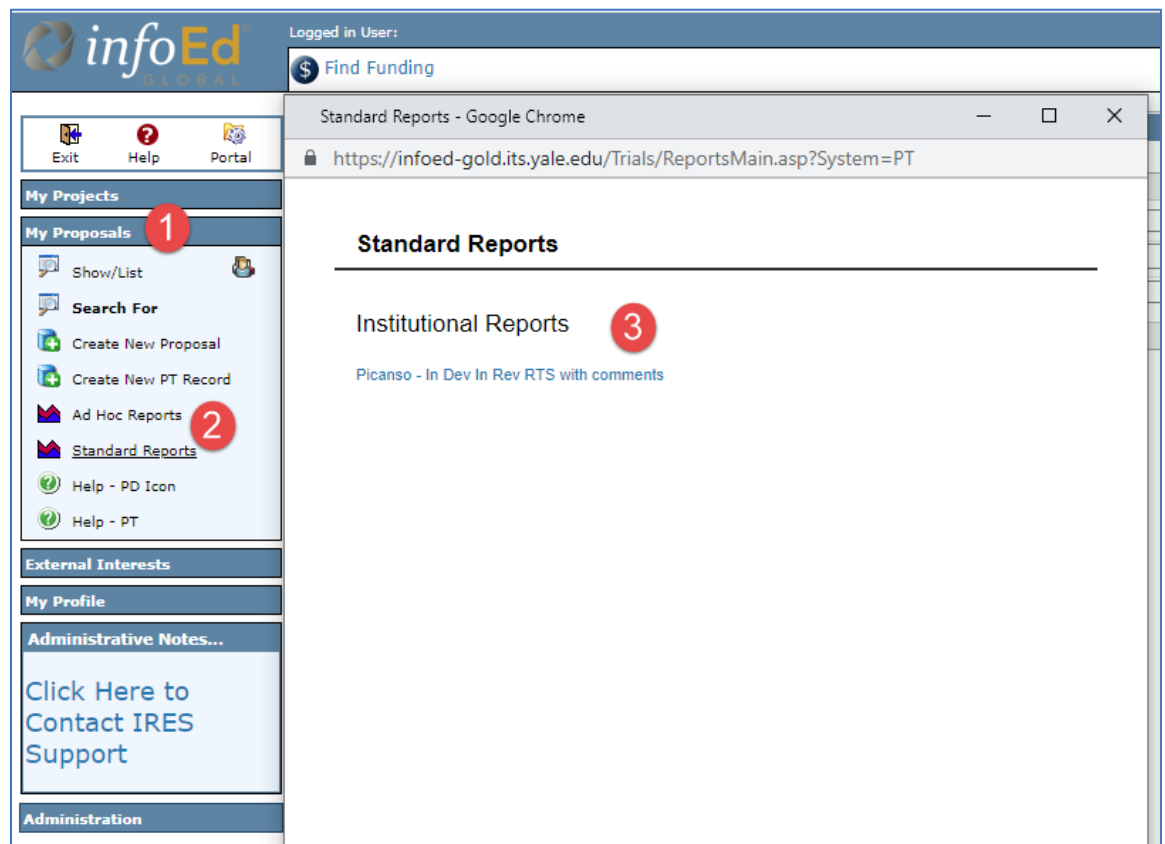
Fields In Report	Alias	1	2	3	None	Subtotal	Collapse	Row-Subtotal	Live Link	Do Not Display	
Current Proposal Status	Current Proposal Status	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	Remove
Institution Number	Institution Number	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Remove
Processed Date	Processed Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	Remove
PI Full Name (PT Requested)	PI Full Name (PT Requested)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	Remove
Instrument Type	Instrument Type	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	Remove
Program Type	Program Type	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	Remove
Project Title	Project Title	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	Remove
Deadline Date	Deadline Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	Remove
Sponsor Name	Sponsor Name	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	Remove
Associated Department - Proposal Primary	Associated Department - Pro	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	Remove
Agreement Type	Agreement Type	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	Remove

STANDARD REPORTING

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>.

4. Click on "My Proposals" in the left-sided navigation.
5. Click on "Standard Reports".
6. Once the screen loads, select reports from available listings.

IRES Enable Portal Transition

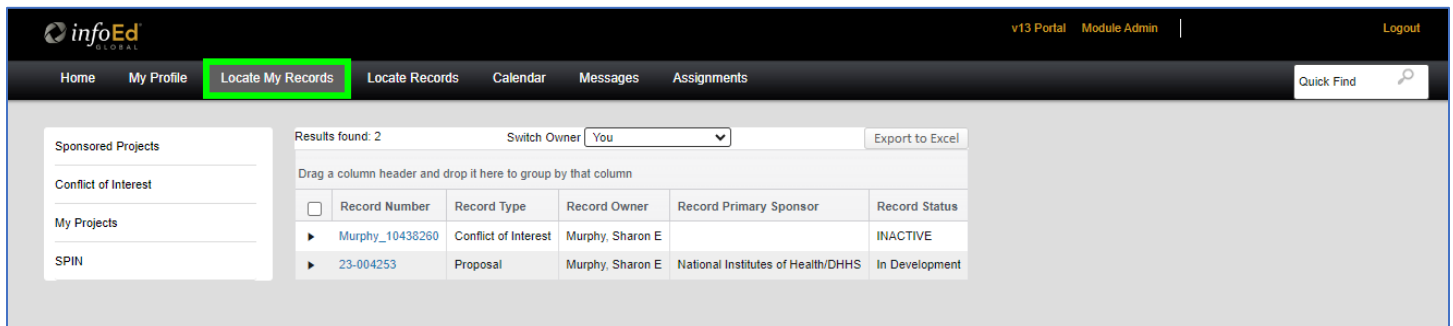


Enabled IRES Portal

LOCATE PERSONAL RECORDS

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>.

1. Click on "Locate My Records" in top navigation bar.
2. Once the screen loads, all available records will display.



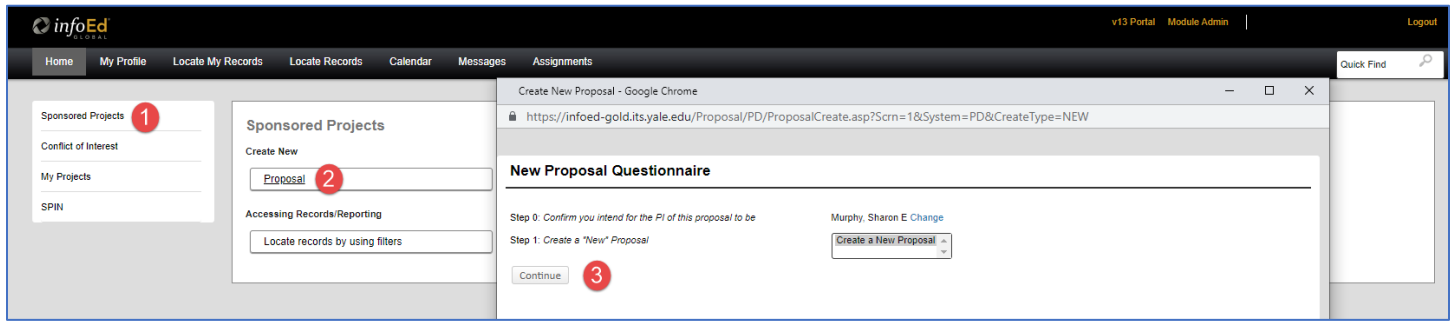
CREATE NEW RECORD

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>

3. Click on "Sponsored Projects" in left navigation pane.
4. Click "Proposal".

IRES Enable Portal Transition

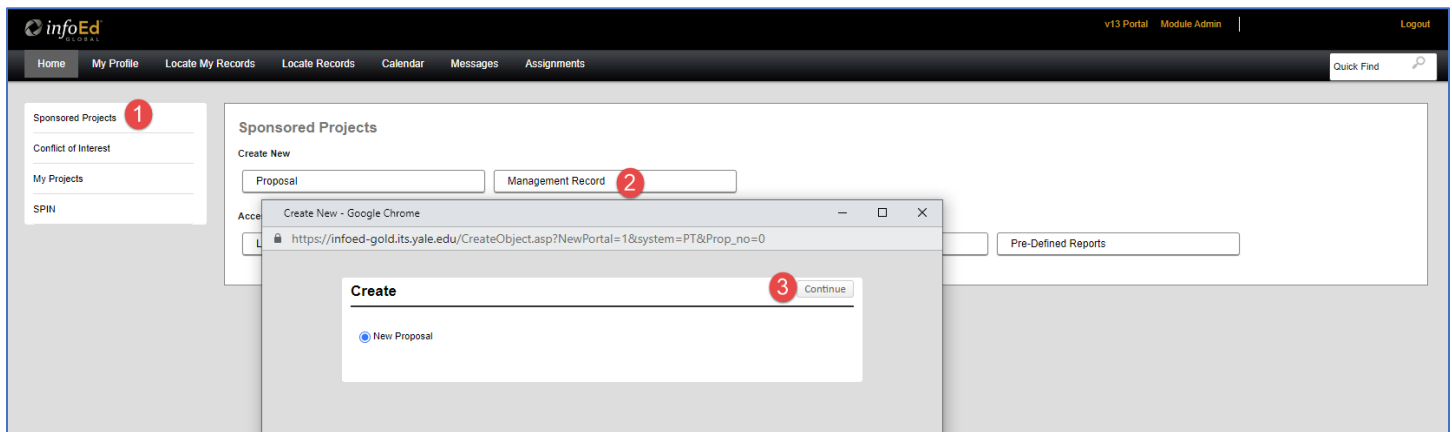
5. Once new pop-up loads follow prompts to create and complete new proposal.



CREATE NEW PT RECORD

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>

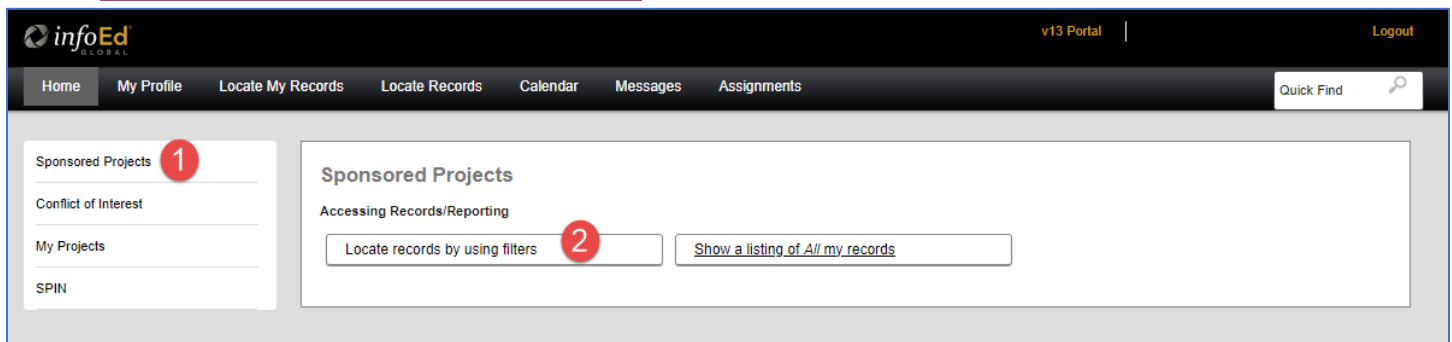
1. Click on "Sponsored Projects" in left navigation pane.
2. Click "Management Record".
3. Once new pop-up loads click "Continue" and complete new PT Record.



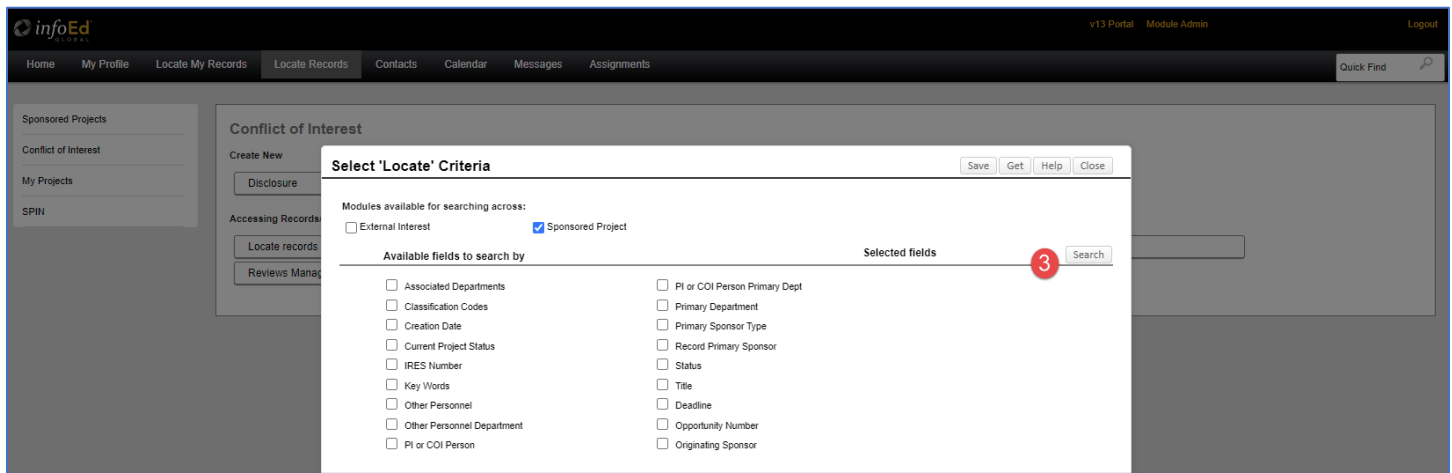
SEARCH FOR RECORD

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>.

1. Click on "Sponsored Projects" in the left-sided navigation.
2. Click on "Locate records by using filters".
3. Once the screen loads, complete search criteria then click "Search".
 - a. For advanced search options, please see [Advanced Enabled Portal Search Features](#)
[Watch the Search and Widgets tutorial video.](#)



IRES Enable Portal Transition

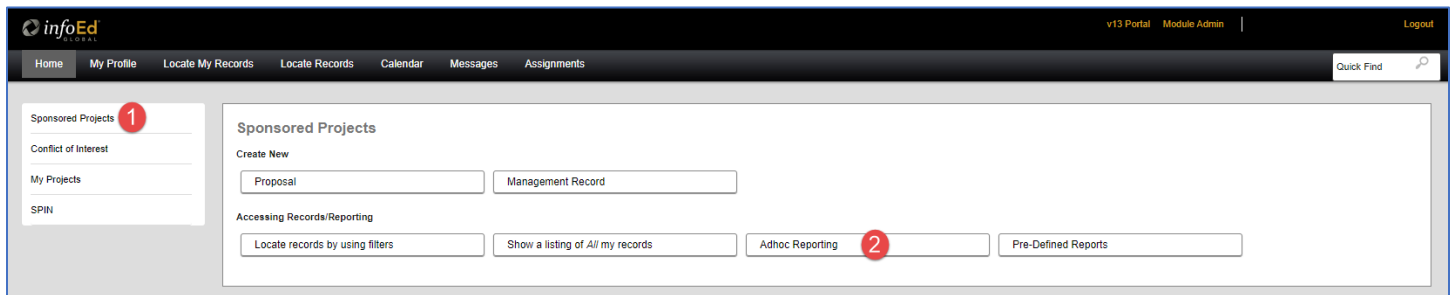


Generating Reports

AD HOC REPORTING

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>.

1. Click on "Sponsored Projects" in the left-sided navigation.
2. Click on "Ad hoc Reporting".
3. Once the screen loads, complete reporting criteria then click "Get".



IRES Enable Portal Transition

The screenshot shows the 'Reporting Tool for Proposal Tracking' in a Google Chrome browser. The URL is <https://infoed-gold.its.yale.edu/Trials/ReportsMain.asp?PIPortal=1&Mode=PT&system=PT&AdHoc=1>. The interface includes a 'Query Criteria' section with dropdown menus for 'Current Proposal Status', 'Include Non-Reportable Records', 'Include Child Submissions', and 'Reviewer - Names'. It also has a 'Condition' column with radio buttons and a 'Value' column with text inputs. A 'Simple' radio button is selected under 'Include Title'. A 'Sort' dropdown is set to 'None'. Below the query criteria is a table of 'Fields In Report' with columns for 'Alias', '1', '2', '3', 'None', 'Subtotal', 'Collapse', 'Row-Subtotal', 'Live Link', 'Do Not Display', and 'Remove'. The table lists various fields like 'Current Proposal Status', 'Institution Number', 'Processed Date', 'PI Full Name (PT Requested)', 'Instrument Type', 'Program Type', 'Project Title', 'Deadline Date', 'Sponsor Name', 'Associated Department - Proposal Primary', 'Agreement Type', and 'Agreement Status (PT only)'. A 'Grand Total' row is at the bottom. Buttons for 'Save Query Criteria and Report Fields', 'Generate XML', 'Generate JSON', and 'Run' are at the bottom right.

STANDARD REPORTING

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>.

1. Click on "Sponsored Projects" in the left-sided navigation.
2. Click on "Pre-Defined Reports".
3. Once the screen loads, select report from available listings.

The screenshot shows the 'infoEd GLOBAL' interface. The top navigation bar includes 'Home', 'My Profile', 'Locate My Records', 'Locate Records', 'Calendar', 'Messages', and 'Assignments'. The left sidebar has 'Sponsored Projects' (marked with a red circle 1), 'Conflict of Interest', 'My Projects', and 'SPIN'. The main content area is titled 'Sponsored Projects' and shows a 'Standard Reports' section with a 'Pre-Defined Reports' button (marked with a red circle 2). Below this, there is a list of reports, including 'Institutional Reports' (marked with a red circle 3) and 'Picasso - In Dev In Rev RTS with comments'. A 'Quick Find' search bar is in the top right corner.

COI

Update/Create COI Disclosure

CURRENT IRES PORTAL

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>

IRES Enable Portal Transition

1. Click on "External Interests" in the left-sided navigation.
2. Click on "Update".
3. Once the screen loads, please click on the "Update Disclosure" button to open disclosure form (if this is first disclosure it will say "Create")

The screenshot shows the 'Create/Update Disclosure' page for a user at Yale University. The left sidebar contains navigation links: Exit, Help, Portal, My Projects, My Proposals, External Interests (1), Update (2), Search, Create New, Ad Hoc Reports, Standard Reports, Expedited Review Report, Program Tools, Help - User Guide, My Profile, Administrative Notes..., Click Here to Contact IRES Support, and Administration. The main content area displays the user's profile: ID 12385168, Name Meghan E. Fernandes, Title Business Systems Analyst 2, Research Admin, Department ITSEA EA Director CC0163, Division ITSEA EA Director Dept, and Last Disclosure Thursday, October 5, 2023. It also includes a calendar for October 2023 and a list of action items: My Action Items, My Workflow Maps, My Messages, and My Contacts. A red circle 3 highlights the 'Update Disclosure' button.

ENABLED IRES PORTAL

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>

1. Once logged in Click on "Conflicts of Interest" in the left-sided navigation.
2. Click on "Create/Update Disclosure".
3. Once the screen loads, please click on the "Update Disclosure" button to open the disclosure form (if this is first disclosure it will say "Create").

The screenshot shows the 'Conflict of Interest' page for a user at Yale University. The left sidebar contains navigation links: Home, My Profile, Locate My Records, Locate Records, Calendar, Messages, Assignments, Sponsored Projects, Conflict of Interest (1), My Projects, SPIN, and Administration. The main content area displays the user's profile: ID 12385168, Name Meghan E. Fernandes, Title Business Systems Analyst 2, Research Admin, Department ITSEA EA Director CC0163, Division ITSEA EA Director Dept, and Last Disclosure Thursday, October 5, 2023. It also includes a calendar for October 2023 and a list of action items: My Action Items, My Workflow Maps, My Messages, and My Contacts. A red circle 2 highlights the 'Create/Update Disclosure' button.

IRES Enable Portal Transition

Locate COI Case

CURRENT IRES PORTAL

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>

1. Click on "External Interests" in the left-sided navigation.
2. Click on "Search".
3. Once the screen loads, complete search criteria then click "Locate".

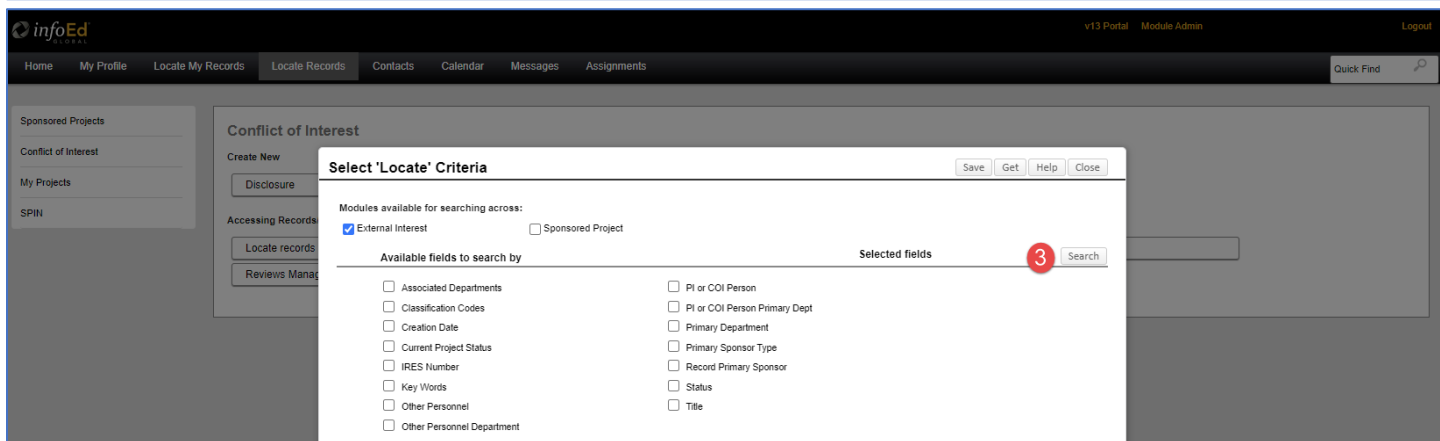
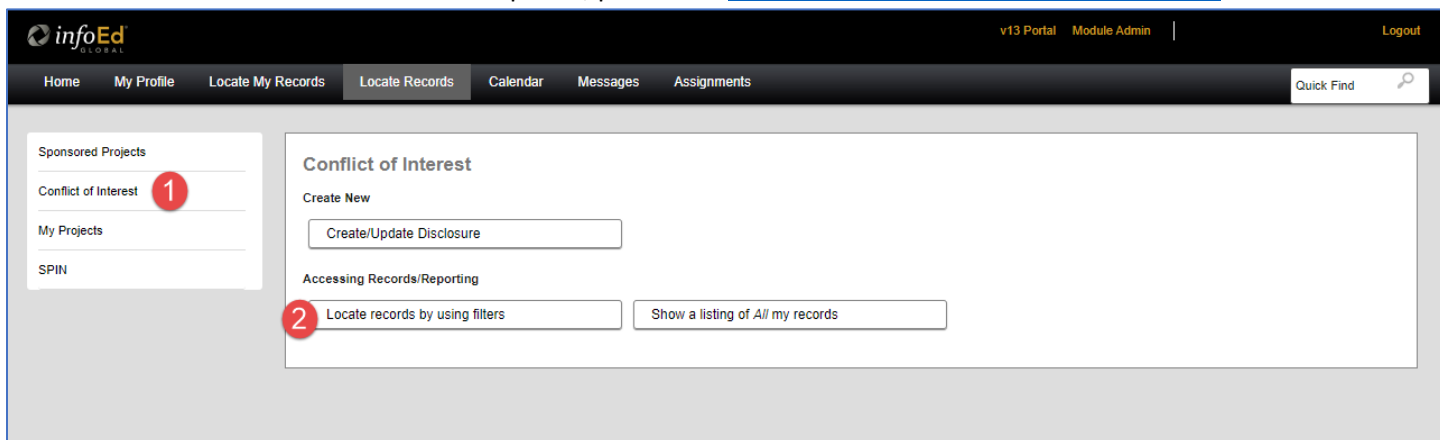
ENABLED IRES PORTAL

Once on VPN or Yale Secure Network log on to <https://ires.yale.edu>

1. Click on "Conflict of Interest" in the left-sided navigation.
2. Click on "Locate records by using filters".
3. Once the screen loads, complete search criteria then click "Search".

IRES Enable Portal Transition

- a. For advanced search options, please see [Advanced Enabled Portal Search Features](#)



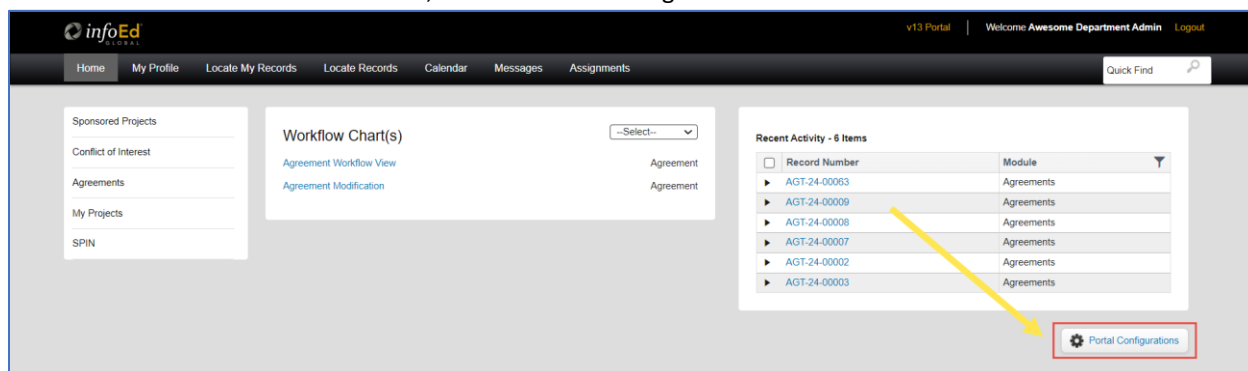
How to Change Your Portal Configuration

Introduction to Widgets

Widgets are mini reports that automatically appear on screen. Some widgets are secured by role; others are optional for everyone; widgets can also be made mandatory. Some widgets display data when they load, while others require clicking a button or a link. When you first launch the Enable Portal, widgets may not be displayed.

ADD WIDGETS TO YOUR HOME PAGE

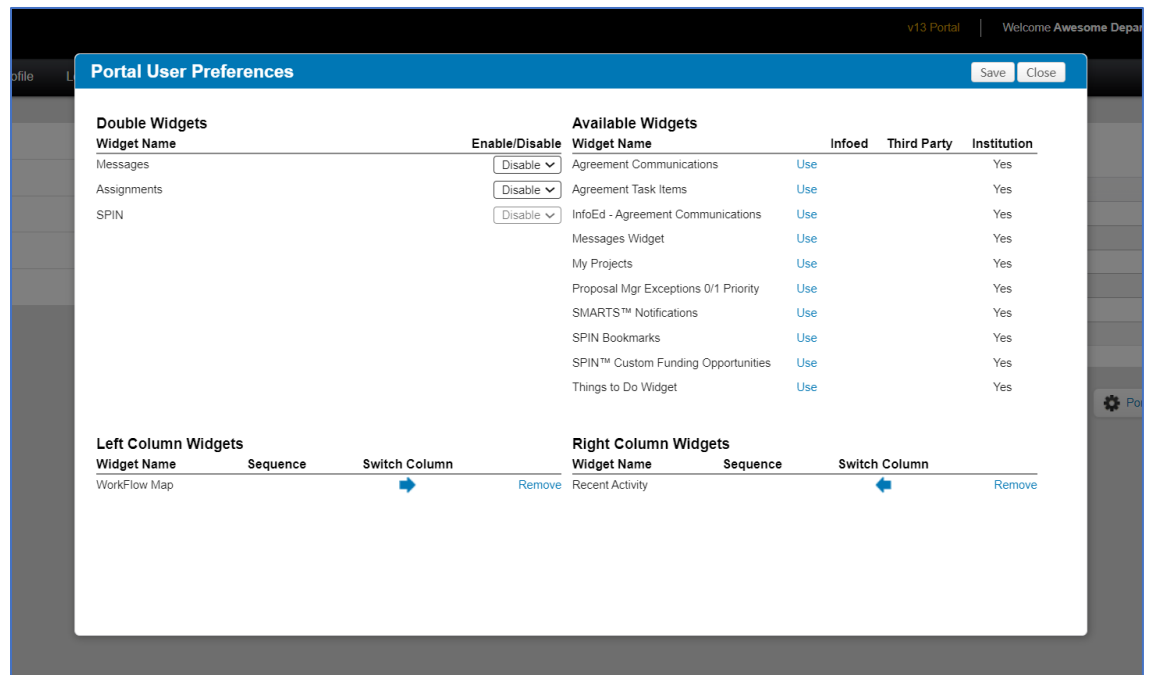
1. Scroll toward the bottom of the screen, click the Portal Configurations button.



2. In the popup window, select widgets that you'd like to use in the top half of the window. Move them around the page using the bottom half of the window.
- a. **Double Widgets** take up the full width of the home screen (except for the left sidebar).

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- b. **Available Widgets** take up half the width of the home screen and are the widgets that you have not selected for use.
- c. **Left Column Widgets** and **Right Column Widgets** are the widgets you have chosen to include on your home screen. You can move them up and down within the column, switch them between columns, or remove them.




3. Click the Save button when you have chosen your widgets and their positions.

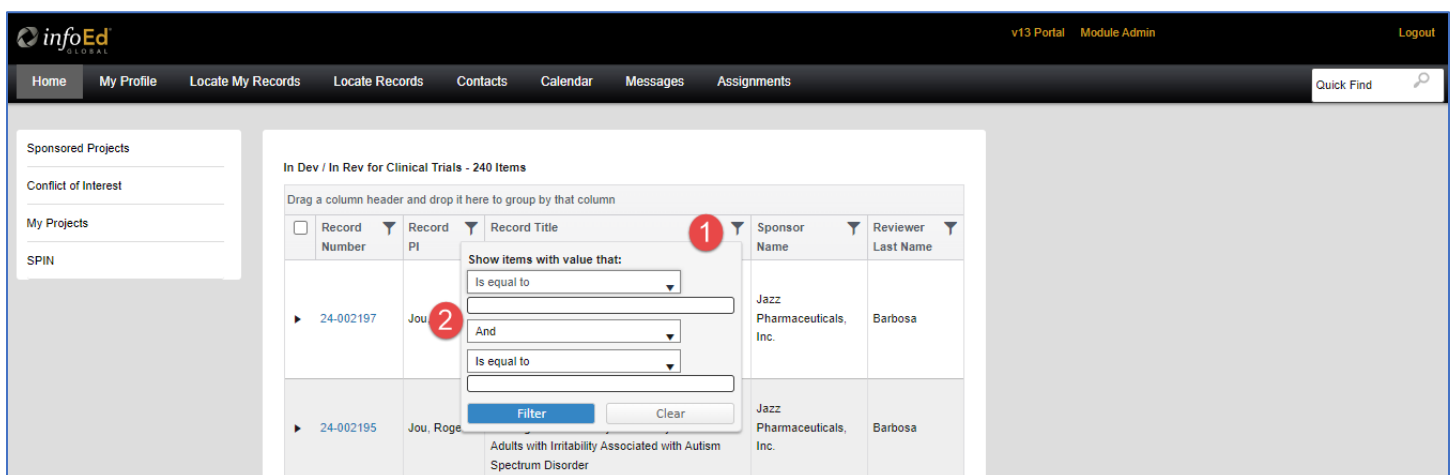
[Watch the Search and Widgets tutorial video.](#)

FILTERING WIDGETS ON YOUR HOME PAGE

Once you have selected the widget(s) to appear on your home page you will see all items associated with the widget(s).

Advanced filter is available within the widgets to assist in fine tuning your view.

1. Click the “” icon at the header of each available column in the widget.
2. A small pop up will appear with multiple dropdowns.



3. Work through the dropdowns to select the correct filtering and complete text fields.

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Sponsored Projects
Conflict of Interest
My Projects
SPIN

In Dev / In Rev for Clinical Trials - 240 Items

Drag a column header and drop it here to group by that column

Record Number	Record PI	Record Title	Sponsor Name	Reviewer Last Name
24-002197	Jou, Roge		Jazz Pharmaceuticals, Inc.	Barbosa
24-002195	Jou, Roge		Jazz Pharmaceuticals, Inc.	Barbosa
24-001698	Leslie, Meredith		Mezzion Pharma Co., Ltd.	Picasso

Show items with value that:

- Is equal to
- Is not equal to
- Starts with
- Contains
- Does not contain
- Ends with
- Is null
- Is not null
- Is empty
- Is not empty

3

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In Dev / In Rev for Clinical Trials - 240 Items

Drag a column header and drop it here to group by that column

Record Number	Record PI	Record Title	Sponsor Name	Reviewer Last Name
24-002197	Jou, Roge		Jazz Pharmaceuticals, Inc.	Barbosa
24-002195	Jou, Roge		Jazz Pharmaceuticals, Inc.	Barbosa

Show items with value that:

Is equal to

And

3

Filter Clear

4. Once all filtering selected and text fields have been completed, click “Filter”. Widget will update with refined results.

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In Dev / In Rev for Clinical Trials - 240 Items

Drag a column header and drop it here to group by that column

Record Number	Record PI	Record Title	Sponsor Name	Reviewer Last Name
24-002197	Jou, Roge		Jazz Pharmaceuticals, Inc.	Barbosa
24-002195	Jou, Roge		Jazz Pharmaceuticals, Inc.	Barbosa

Show items with value that:

Is equal to

Test

And

Is equal to

Test

4

Filter Clear

Adults with Irritability Associated with Autism Spectrum Disorder

[Watch the Search and Widgets tutorial video.](#)

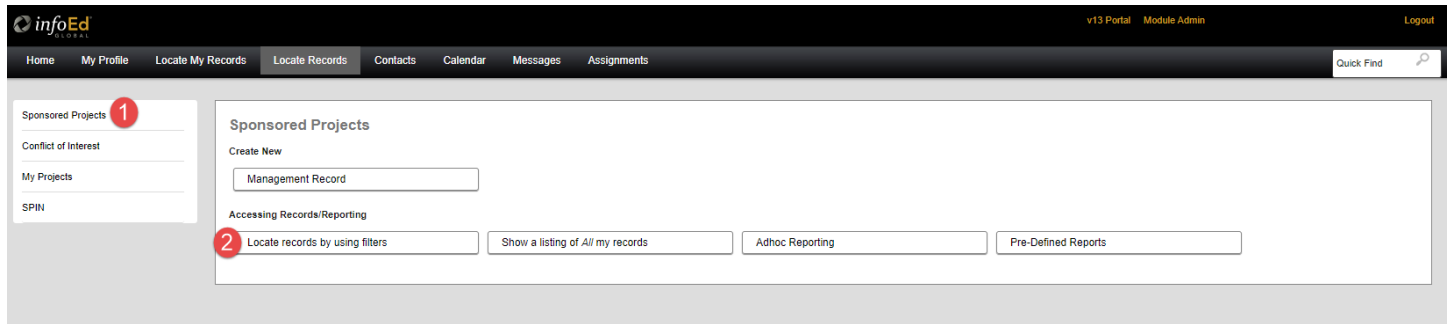
Advanced Enabled Portal Search Features

The Enabled Portal offers much of the same functionality as its predecessor V13 portal. However, when searching for either PD/PT records or for a COI Disclosure there are new advanced searching features for users.

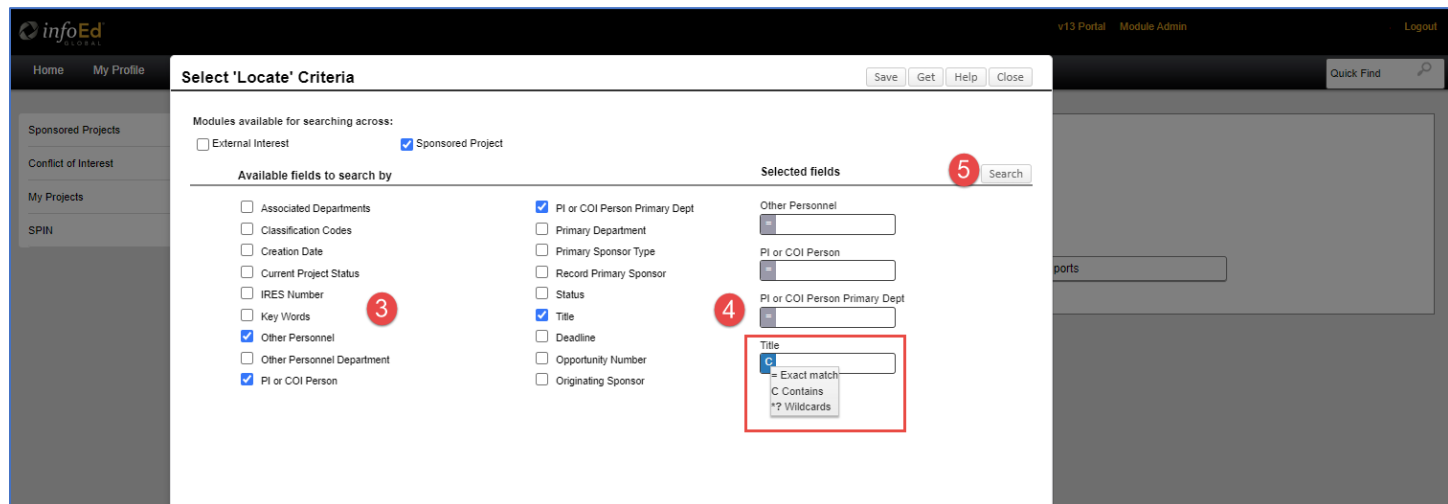
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Advanced Search for PD/PT

1. Click Sponsored Project in left navigation pane.
2. Click "Locate records by using filters."



3. Pop-up will appear; select from any of the available fields.
4. For each selected field a labeled text box will appear.
 - a. Some of these boxes will have a small grayed-out area; mousing over this will generate a dropdown menu.
 - i. Select one of the available options from the dropdown menu to fine tune search further for selected field.
 - b. Any selected fields without additional sort dropdown menu will use progressive text searching.
5. Once all fields selected and completed click "Search".



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Select 'Locate' Criteria [Save] [Get] [Help] [Close]

Modules available for searching across:
☐ External Interest ☒ Sponsored Project

Available fields to search by	Selected fields
<input type="checkbox"/> Associated Departments <input type="checkbox"/> Classification Codes <input type="checkbox"/> Creation Date <input type="checkbox"/> Current Project Status <input type="checkbox"/> IRES Number <input type="checkbox"/> Key Words <input checked="" type="checkbox"/> Other Personnel <input type="checkbox"/> Other Personnel Department <input checked="" type="checkbox"/> PI or COI Person	<input checked="" type="checkbox"/> PI or COI Person Primary Dept <input type="checkbox"/> Primary Department <input type="checkbox"/> Primary Sponsor Type <input type="checkbox"/> Record Primary Sponsor <input type="checkbox"/> Status <input checked="" type="checkbox"/> Title <input type="checkbox"/> Deadline <input type="checkbox"/> Opportunity Number <input type="checkbox"/> Originating Sponsor

Other Personnel: [Text Box]
 PI or COI Person: [Text Box]
 PI or COI Person Primary Dept: [Text Box]
 Title: [Text Box] (Dropdown menu: '= Exact match', 'C Contains', '*? Wildcards')
 [5] Search

[Watch the Search and Widgets tutorial video.](#)

Advanced Search for COI

1. Click Conflict of Interest in left navigation pane.
2. Click "Locate records by using filters."

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 Conflict of Interest **1**
 My Projects
 SPIN

Conflict of Interest
 Create New
 [Disclosure] [Create/Update Disclosure]
 Accessing Records/Reporting
2 [Locate records by using filters] [Show a listing of All my records] [Adhoc Reporting] [Pre-Defined Reports]
 [Reviews Management]

3. Pop-up will appear; select from any of the available fields.
4. For each selected field a labeled text box will appear.
 - a. Some of these boxes will have a small grayed-out area; mousing over this will generate a dropdown menu.
 - i. Select one of the available options from the dropdown menu to fine tune search further for selected field.
 - b. Any selected fields without additional sort dropdown menu will use progressive text searching.
5. Once all fields selected and completed click "Search".

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