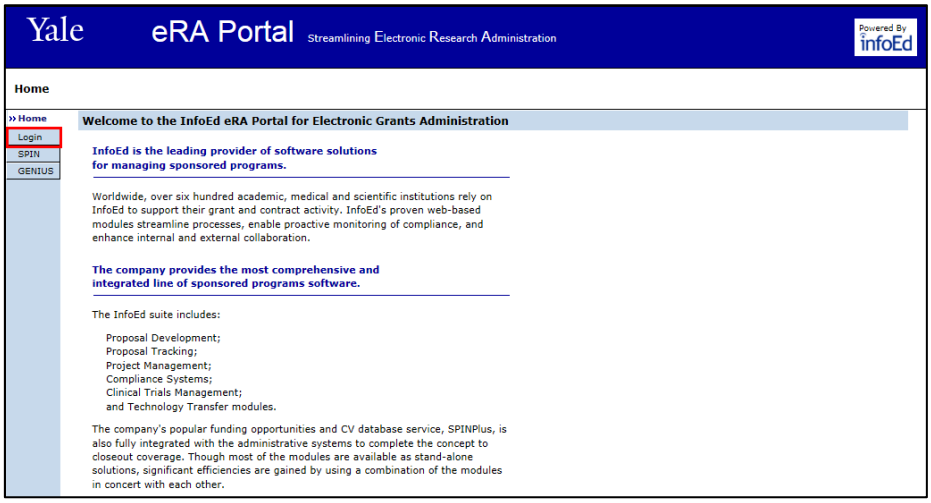
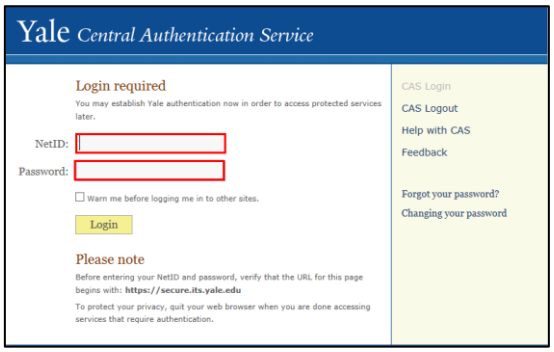
This quick guide highlights the process for logging into **IRES** and navigating the tabs on the menu bar.

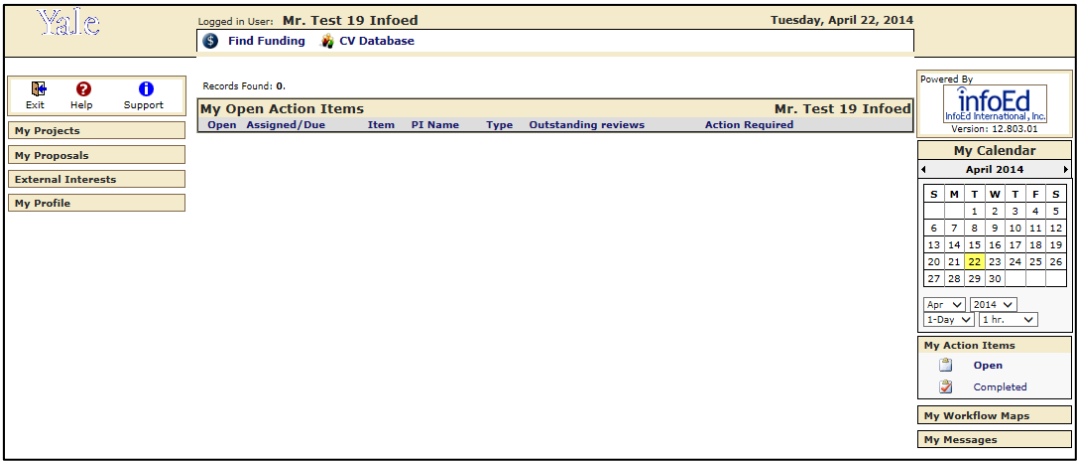
1 Access the **IRES Main Page** at the following address https://ires.yale.edu/ and click **Login**.

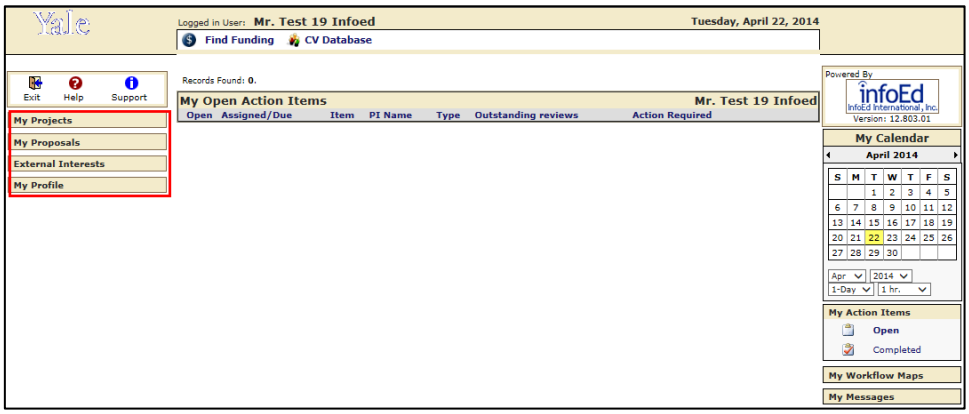
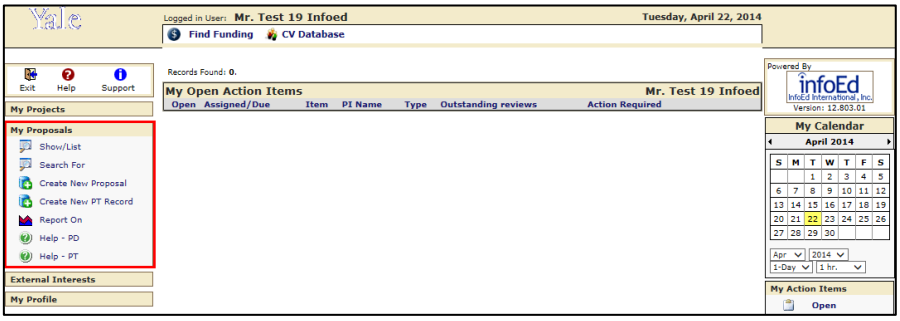



Enter **NetID and Password**.




2 The **IRES Main Page** will appear.

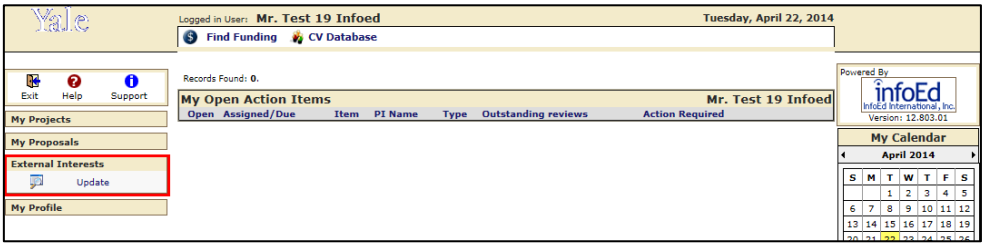


| | |
|---|---|
| 3 | From the **IRES Main Page**, select one of the following tabs from the left-hand side bar:<br><br>• **My Proposals**<br>• **External Interests**<br>• **My Profile**<br><br>  <br><br><br>**Note:** *The **My Projects** tab is not being used at this time.* |
| 3.a | **<u>My Proposals</u>**<br><br>The **My Proposals** tab provides searching capability for all proposals entered into **IRES Proposal Development (PD)** and **Proposal Tracking (PT)**. Users may also use this tab to create a new PT Record or PD Record.<br><br>**My Proposals – Sub-Menu Options:**<br>• **Show/List:** Allows users to view all proposals in **PT** and **PD** in which they are listed as the Principal Investigator (PI).<br>• **Search For**: Allows users to search for previously created proposals to which they have access.<br>• **Create New Proposal**: Allows users to create a new proposal record in the **Proposal Development (PD)** system.<br>• **Create New PT Record:** Allows users to create a new proposal record in the **Proposal Tracking (PT)** system.<br>• **Report On:** Allows users to navigate to the **Proposal Tracking (PT) Reporting Tool**.<br>• **Help – PD**: Do not use this option.<br>• **Help – PT**: Do not use this option.<br><br>  <br> |

3.b **External Interests**

The **External Interests** tab allows users to submit Conflict of Interest (COI) disclosures.

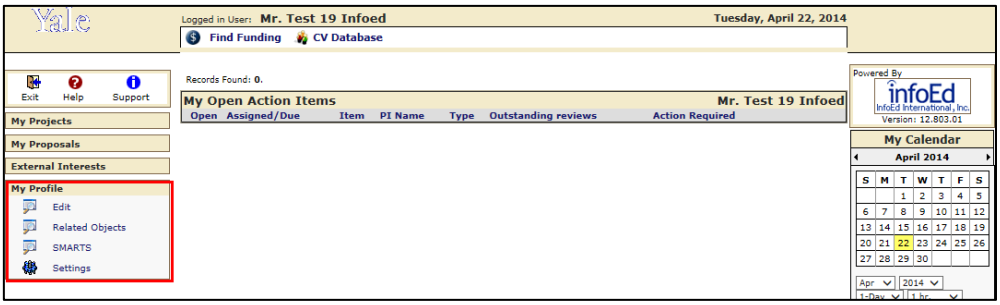
- **Update**: Allows users to recertify or update their annual COI disclosure.



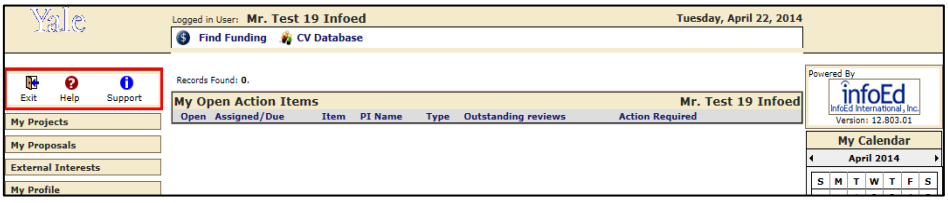

3.c **My Profile**

The **My Profile** tab allows users to edit their personal profile and settings.

- **Edit Icon**: Allows users to edit or update their personal profile information.
- **Setting Icon**: Allows users to change or customize their IRES Main Page preferences, i.e. color scheme, tabs, etc.




4 **Icons**




- **Exit:** Use this icon to exit the **IRES** system. *It is important to use this icon rather than x'ing out of the browser window to ensure that the application is closed properly.*
- **Help:** This icon is not used.
- **Support**: Use this icon to access the Toolkit section of the GCA/GCFA website.

| | |
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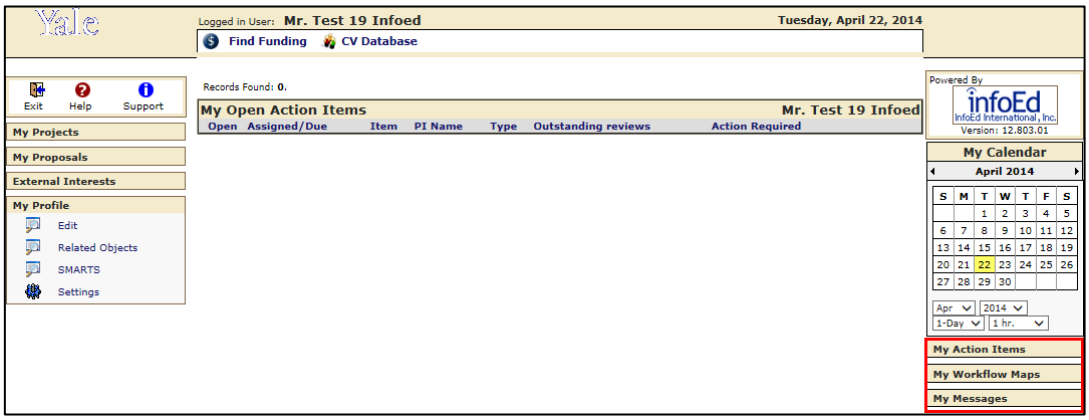
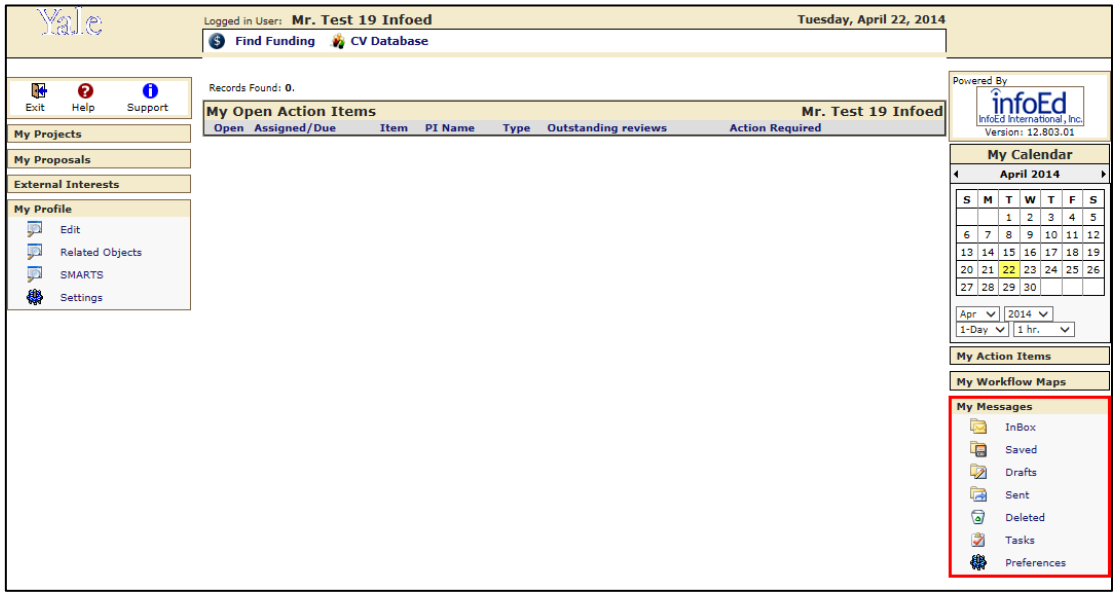
| 5 | From the **IRES Main Page**, select one of the following options from the right-hand menu bar:<br><br>• **My Action Items:** Not being used at this time<br>• **My Messages**<br><br>  <br><br><br>**Note:** *The **My Workflow Maps** tab is not being used at this time.* |
| 5.a | **<u>My Messages</u>**<br><br>The **My Messages** tab allows users to view emails and notifications sent to their **IRES Inbox**.<br><br>  <br> |

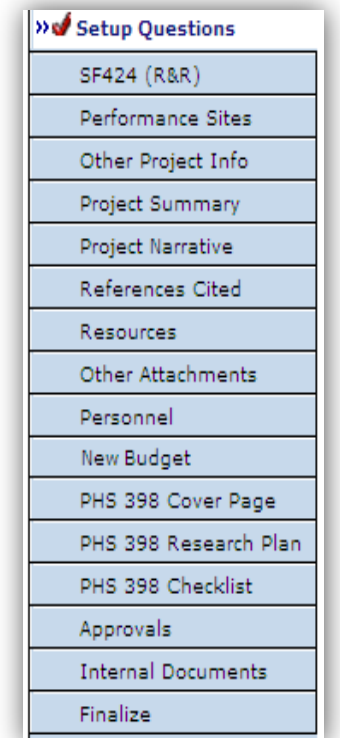
# IRES

## PD and PT Record Navigation

This quick guide highlights the process for navigating **IRES Proposal Development (PD)** and **Proposal Tracking (PT)** records, the standard tabs, and folders located in each.

### PROPOSAL DEVELOPMENT (PD)

**Note:** *The sidebar for a proposal in PD varies based on the sponsor and template chosen during the Setup Questions. All templates for Master Record proposal types (New, Competing Continuation, Resubmission etc.) have the **Setup Questions**, **Face Page**, **Personnel**, **Budget**, **Internal Documents**, and **Finalize** tabs, as well as other tabs specific to that type. Child Record proposal types (Non-Competing Continuation, Supplement…) may include some of these tabs, as well as other tabs specific to that type.*



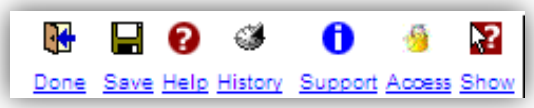

**Setup Questions:** Answering the Setup Questions will drive the selection of the appropriate proposal template that is generated for the proposal.

**Personnel Tab:** Lists all personnel associated with the project. The Principal Investigator (PI) chosen during the Setup Questions will be included in the **Key Personnel** section. ***Use this tab to enter Key Personnel Consultants, Non-Key Personnel Consultants, and Other Significant Contributors. All other personnel should be entered via the Budget Tab.***

**Budget Tab:** Allows users to enter Budget details including Personnel, Non-Personnel, Cost Sharing, SubAward and SubProject costs via the Budget Summary screen or by Budget Period.

**Internal Documents:** Allows users to review and/or modify institutional forms and upload institutional supporting documents associated with the proposal.

**Finalize:** Allows users to build PDF documents, sequence the application pieces, and submit the application to the route for review, certification, approval and submission to the sponsor.




**Done:** Click **Done** to completely exit the PD Record window.

**Save:** *Always* click **Save** after entering information in the PD Record, and prior to clicking **Done**.

**History**: Use this icon to view information on users that have accessed the PD Record.

**Support:** Use this icon to access the **Help** section of the GCA/GCFA website.

**Access:** This icon shows the user's security information by role.

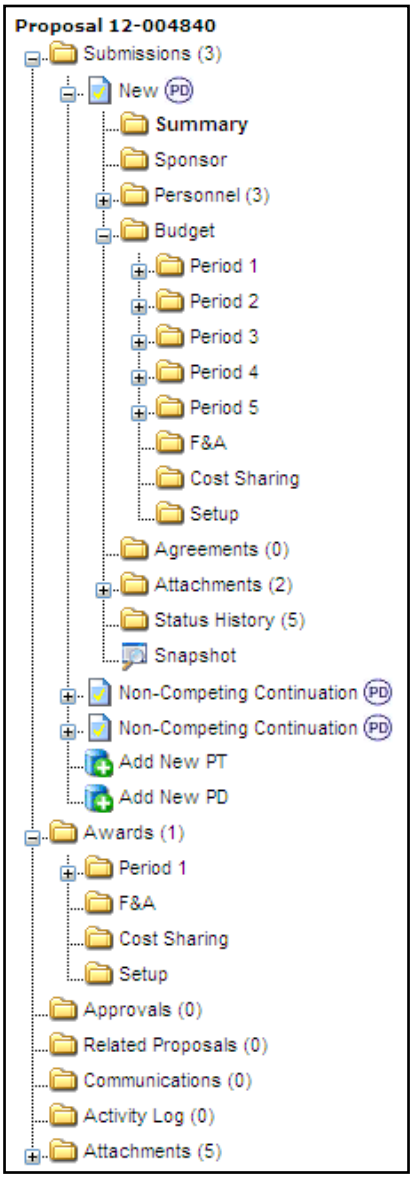
**Show:** Use this icon to turn on the **Hover Help** feature. Once clicked, the **Hide** icon will replace the **Show** icon. Use the **Hide** icon to turn off the **Hover Help** feature.

**Additional Icons:**

| Icon | Use |
|---|---|
| | To Open |
| | To View |
| or | To Edit |
| | To Remove |
| | To Delete |
| | For a Calendar |
| | To Upload a Document |
| | To Open a PDF |
| | To Replace |
| | To Download |
| | To Get a Document |
| | To Remove a Document |
| | For a History |
| | To Inflate |
| | For Committed |
| | For a Budget Detail |
| | To Build |
| | To Insert |
| | For a History |

## PROPOSAL TRACKING (PT)

The following PT sidebar displays, allowing you to enter or review proposal data.




**Submissions Folder:** Displays sub-folders that allow you to enter or view information into the PT Record.

**Summary Folder:** Enter/edit basic record information associated with the proposal, including title, type, deadline date, Reviewer, Dept. Admin. Contact and department.

**Sponsor Folder:** Enter/edit detailed information about the sponsor to which the proposal is being submitted in addition other information including program and instrument type.

**Personnel Folder:** View all key, non-key and responsible personnel on the proposal. As personnel are added, a sub-folder is created for each individual in the PT Record.

**Note:** *Always add personnel through the **Budget** folder to populate the **Personnel** folder.*

**Budget Folder:** Enter/edit budget and personnel information. *See*

**Agreements Folder:** Enter, edit and track contract details related to the proposal.

**SubProjects Folder:** View all SubProjects on the proposal.

**Note:** *Always add SubProjects through the **Budget** folder.*

**Attachments Folder:** Upload or review proposal documentation that was previously uploaded, create or modify electronic institutional forms, e.g. the TranSum e-Form.

**Status History Folder:** Enter a new status or view the status history of the PT Record.

**Snapshot:** View a consolidated summary of all information entered into the PT Record.

**Add New PT:** Create a Child Record off of the Master Record.

**Add New PD:** Create a Child Record off of the Master Record.

**Awards Folder:** Enter/edit award and budget information.

**Approvals Folder:** View IACUC and HRPP approvals.

**Related Proposals Folder:** View or add records related to the Master Record, e.g. *Competing Continuation, Resubmission etc.*

**Communications Folder:** Enter or track communications related to the PT Record.

**Activity Log Folder:** Enter/edit activities items that require an action, e.g. *T&C Review, JIT Requested etc.*

**Note:** *All activity items must be closed once resolved*.

**IRES Icons**:

**Done:** Click **Done** to exit the PT Record window. **Reminder:** *Click **Save** prior to clicking **Done** to save entered proposal information.*

**Save:** ***Always*** click **Save** after entering information in the various folders of the PT Record.

**Help**: Routes users to the InfoEd Proposal Tracking Users Guide.

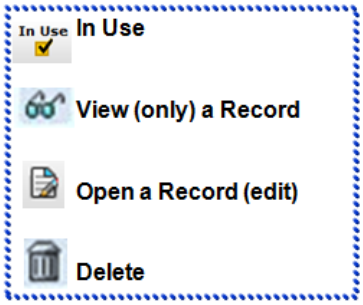
**History:** Displays information related to the access history of the PT Record.

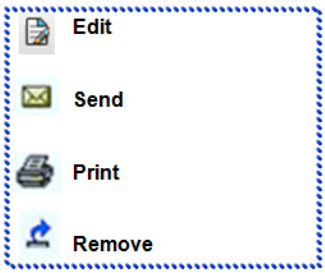
**Support:** Use this icon to access the Toolkit section of the GCA/GCFA website.

**Access:** Shows security information by role.

**Show:** Displays help information for individual fields.

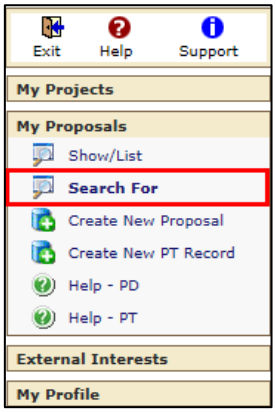
**Additional Icons:**



This quick guide highlights the process for searching for a proposal in **IRES**.

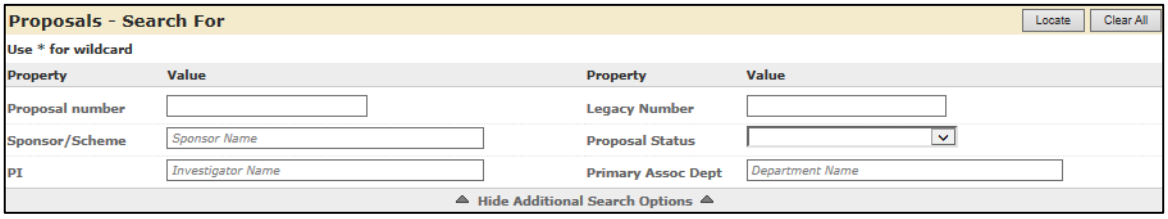
1 Click **Search For** under the **My Proposals** tab.




2 Enter the search criteria in the appropriate field.

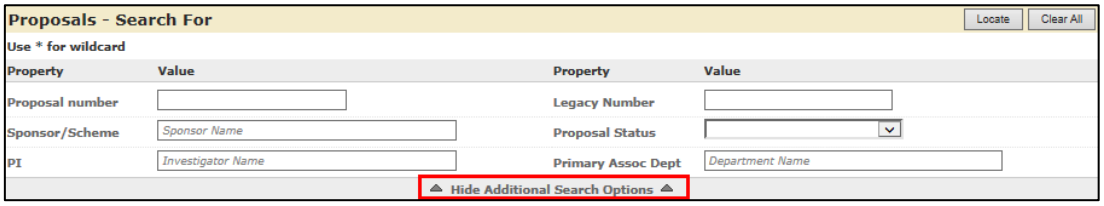
Search using any of the following criteria:

- **Proposal Number**
- **Sponsor/Scheme**
- **PI**
- **Legacy Number**
- **Proposal Status**
- **Primary Assoc Dept.**

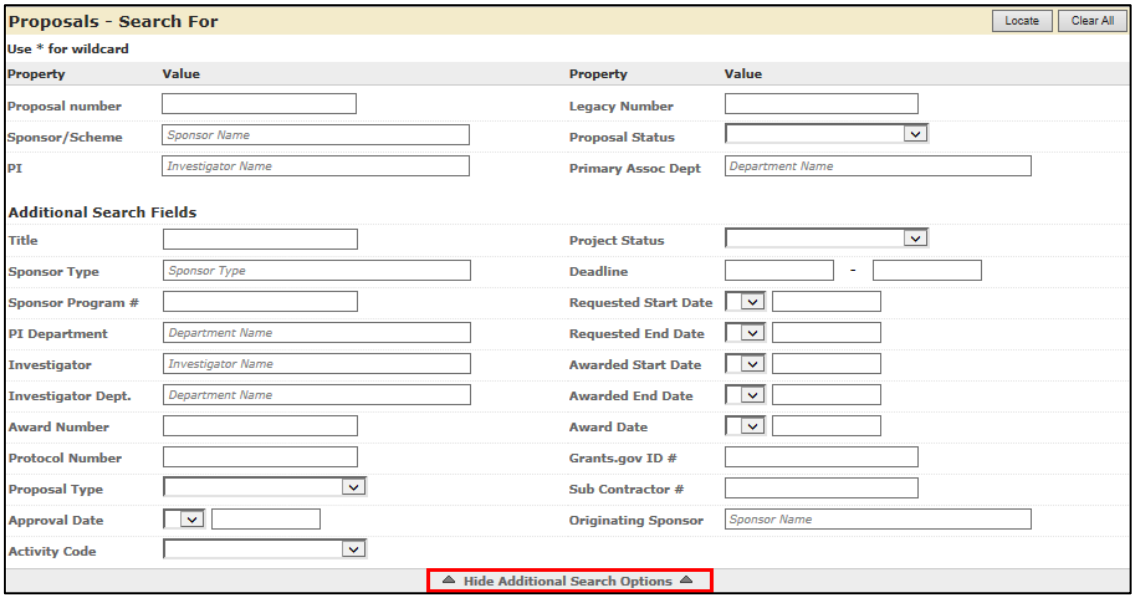



**Note:** *Use the wildcard (*) symbol to replace unknown values. Place the wildcard at the beginning or end of the information entered only in non-Progressive Search fields, i.e. Proposal Number and Legacy Number fields.*

2.a If necessary, click **Show Additional Search Options** tab to enter additional details.

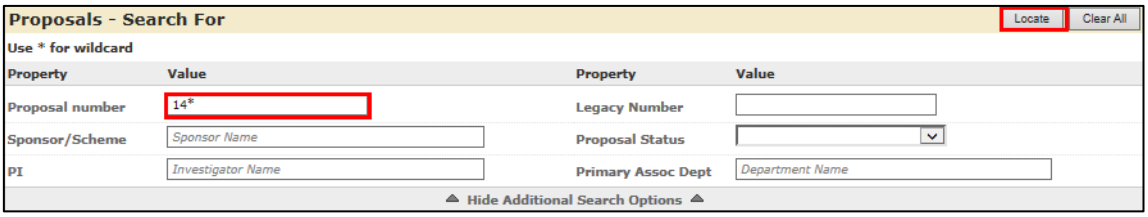


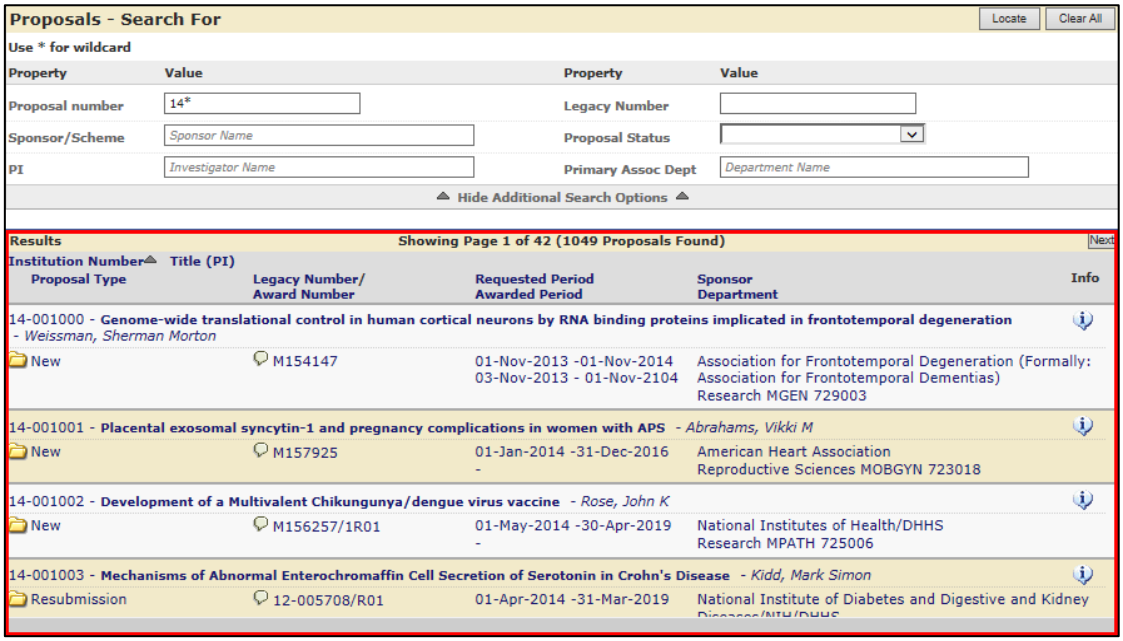

The **Additional Search Fields** screen will display. Use this screen to narrow your search.




Click **Hide Additional Search Options** to hide the **Additional Search Fields** section.

3 To search and locate proposals beginning with the number 14 (i.e., created in the year 2014), enter 14* in the proposal number field and click **Locate** to execute your search.



| | |
|---|---|
| 4 | All results matching your search criteria will display.<br>  |
| 5 | Scroll your mouse over the folder ( ) icon. The record menu bar will display.<br> <br>Select one of the following icons within the appropriate column:<br>• Select the **Edit** ( ) icon to open the record in edit mode.<br>• Select the **View** ( ) icon to view the record in View Only mode.<br>• Select the **Forward** ( ) icon to forward the record to another IRES user.<br>• The **Delete** ( ) icon is disabled, and is not available for use. |