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/](https://ires.yale.edu/) and click Login.

   ![IRES Main Page](image)

   Enter NetID and Password.

2. The IRES Main Page will appear.

   ![IRES Main Page](image)
3 From the **IRES Main Page**, select one of the following tabs from the left-hand side bar:

- My Proposals
- External Interests
- My Profile

![Image of IRES Main Page]

**Note:** The **My Projects** tab is not being used at this time.

3.a **My Proposals**

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.

**My Proposals – Sub-Menu Options:**

- **Show/List:** Allows users to view all proposals in PT and PD in which they are listed as the Principal Investigator (PI).
- **Search For:** Allows users to search for previously created proposals to which they have access.
- **Create New Proposal:** Allows users to create a new proposal record in the **Proposal Development (PD)** system.
- **Create New PT Record:** Allows users to create a new proposal record in the **Proposal Tracking (PT)** system.
- **Report On:** Allows users to navigate to the **Proposal Tracking (PT) Reporting Tool**.
- **Help – PD:** Do not use this option.
- **Help – PT:** Do not use this option.
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.

![External Interests Tab Image](image)

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.

![My Profile Tab Image](image)

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.

![Icons Image](image)
From the IRES Main Page, select one of the following options from the right-hand menu bar:

- **My Action Items**: Not being used at this time
- **My Messages**

Note: The **My Workflow Maps** tab is not being used at this time.

**5.a My Messages**

The **My Messages** tab allows users to view emails and notifications sent to their IRES Inbox.
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.

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**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.

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**Additional Icons:**

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<td>To Open</td>
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<td>To View</td>
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<td>For a Budget Detail</td>
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<td>For a History</td>
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PROPOSAL TRACKING (PT)

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

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**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:

- **In Use**
- **View (only) a Record**
- **Open a Record (edit)**
- **Delete**
- **Edit**
- **Send**
- **Print**
- **Remove**
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.

5

Scroll your mouse over the folder (click) icon. The record menu bar will display.

Select one of the following icons within the appropriate column:

- Select the **Edit** ( ) icon to open the record in edit mode.
- Select the **View** ( ) icon to view the record in View Only mode.
- Select the **Forward** ( ) icon to forward the record to another IRES user.
- The **Delete** ( ) icon is disabled, and is not available for use.