



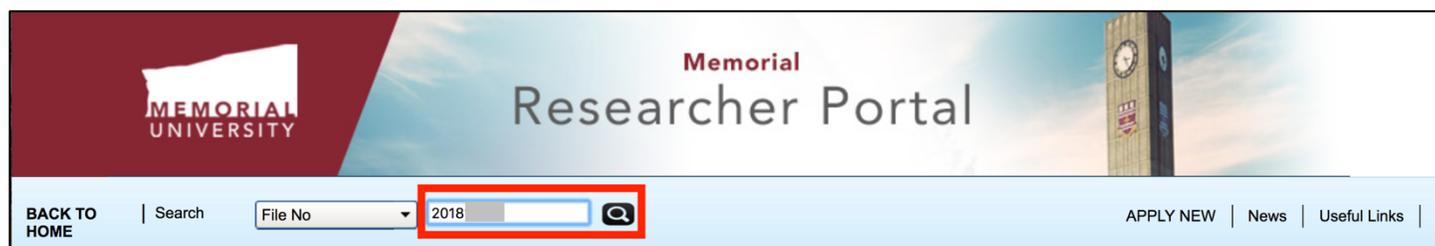
Quick Tip: How to Filter Applications in the Researcher Portal

Overview

Using the filtering features in the Researcher Portal helps researchers locate specific applications more easily. When researchers have many applications in the Researcher Portal, it can become more challenging to locate a specific file. The filtering features allow researchers to search for specific files based on filtering criteria.

How to Filter Applications

If you know the file number for the application, you can use the search field below the Researcher Portal banner.



- Enter the file number in the field.

NOTE: You can search for a file by Application Ref No (the four-digit number assigned to draft applications) by selecting Application Ref No from the dropdown to the left of the text field.

- Click the search icon.

Information about the requested file will appear on the screen.

If you wish to search using different criteria, there are other filtering options available.

Click on the link from the Researcher Portal homepage that corresponds to the file you wish to locate.

In this scenario, the researcher will look for a file under Applications: Post-Review for the Role: Principal Investigator role block.

Role: Principal Investigator	
Applications: Drafts	(2)
Applications: Requiring Attention*	(2)
Applications: Under Review	(4)
Applications: Post-Review	(4)
Applications: Withdrawn	(24)
Events: Drafts	(1)
Events: Requiring Attention	(0)
Reminders*	(1)
Role: Project Team Member	

In this example, four applications are listed.

BACK TO HOME		Search	File No		APPLY NEW	News	Useful Links
Reset Filters		Export To Excel					
	File No	Project Title	Principal Investigator	Application Type	Status Snapshot	Workflow Message	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	All	<input type="text"/>		
View Clone Events	2018	TESTING AC FILE	Dr. [REDACTED] (Faculty of Science/Department of Biology)	Animal Use Protocol Form (Certification/Animal Care)	Project Status: Active Workflow Status: Approval Decision Made	TEST AC FILE	
View Clone Events	2018	Sample Application	Dr. [REDACTED] (Faculty of Science/Department of Biology)	Application for Research Funding (Awards/Awards)	Project Status: Active Workflow Status: Approval Decision Made		
View Clone Events	2018	Complete Workflow - Demo Marine Institute Submission	Dr. [REDACTED] (School of Fisheries/Centre for Aquaculture and Seafood Development)	Marine Institute Application for Research Funding (Awards/Awards)	Project Status: Active Workflow Status: Approval Decision Made	Active	
View Clone Events	2018	Testing Complete Workflow	Dr. [REDACTED] (Faculty of Science/Department of Biology)	Application for Research Funding (Awards/Awards)	Project Status: Active Workflow Status: Approval Decision Made	TEST SPONSOR APPROVAL	

At the top of most of the columns of this table are filtering tools available. The funnel symbol next to the field provides filtering options. This quick tip sheet will touch upon a few of these options that researchers may find useful.

If you wish to clear your filtering criteria, click on the Reset Filters button.

If you wish to export an Excel spreadsheet of your filtered results, click on the Export To Excel button. (When opening the file: If a pop-up window appears in Excel about file formats and extensions, click “Yes” to open the file.)

BACK TO HOME		Search	File No		APPLY NEW	News	Useful Links
Reset Filters		Export To Excel					
	File No	Project Title	Principal Investigator	Application Type	Status Snapshot	Workflow Message	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	All	<input type="text"/>		

If you know the **file number** (or, in the case of a draft application, the reference number):

- Type the number in the File No filter field.
- Click on the funnel icon.
- Select EqualTo as the filter option.

The specific file will appear as the only result.

If you know part of the **Project Title**:

- Type the part of the title in the Project Title filter field.
- Click on the funnel icon.
- Select Contains as the filter option.

Files containing that content in the Project Title will appear as results.

If you know the name of the **Principal Investigator**:

- Type the name in the Principal Investigator filter field.
- Click on the funnel icon.
- Select Contains as the filter option.

Files containing that content in for the Principal Investigator will appear as results.

If you wish to only see files of a **specific application type** (Awards, Animal Care, Human Ethics):

- Select the dropdown box in the Application Type column.
- Select the application type you wish to view.

Files of that application type will appear as results.

If you wish to only see files with a **specific project status** (Active, Completed, Denied):

- Type the project status you wish to view in the Status Snapshot filter field.
- Click on the funnel icon.
- Select Contains as the filter option.

Files containing that status will appear as results.