

**Description:** Protocol Search is a robust searching tool that allows you to specify search criteria and then choose additional protocol data to appear in the search results. You can export your search results to a PDF report or Excel spreadsheet.

To demonstrate how the search tool works, this guide only includes instructions for a few basic searches. You can use the same methods demonstrated to create searches that are more complicated. You can also save and share searches that you would like to use repeatedly.



***Protocol Search will only display protocols that you have access/permission to see.  
If you cannot find a protocol that you should see, contact [OnCore-Support@ahc.ufl.edu](mailto:OnCore-Support@ahc.ufl.edu).***

## BEFORE YOU START A SEARCH...REVIEW AVAILABLE DATA FIELD GROUPINGS

1. Navigate to **Menu > Protocols > Protocol Search**.
2. Notice the first four data sections:
  - a. Protocol Status
  - b. Participating Institution
  - c. Protocol Identifiers
  - d. Staff
3. The following data sections are collapsed. To access the data fields that are listed in these collapsed groups, click the small blue plus sign **[+]** next to the data section name:
  - a. **[+]** Main
  - b. **[+]** Management
  - c. **[+]** Treatment
  - d. **[+]** Protocol Annotations
  - e. **[+]** Accrual
  - f. **[+]** LTFU

## SAMPLE SEARCH: PROTOCOLS IN YOUR MANAGEMENT GROUP

1. Navigate to **Menu > Protocols > Protocol Search**.
2. Click the small blue plus sign **[+]** next to the **Management** data group label.

The screenshot shows the 'Management' section of the Protocol Search interface. A red box labeled '2' highlights the plus sign next to the 'Management' label. Below this, a 'Result Column?' section lists several fields with checkboxes: UF CRC No., Grant/Fund Acct No. (with a dropdown arrow), Hospital Account No., Internal Account No., IRB No., and Organizational Unit. A red box labeled '4' highlights the checkbox for 'Management Group'. To the right, a 'Multi-Select' field contains the text 'AHC - Nephrology', with a red box labeled '3' highlighting this text. Below the 'Multi-Select' field, there are two 'Filter Type' radio button options: 'Contains Any (OR)' (selected) and 'Does Not Contain'. At the bottom, there is a 'Primary Management Group Only?' checkbox.

3. In the **Management Group Multi-Select** field, pick your management group(s) from the drop-down list. You can select multiple management groups.
4. If you have selected multiple management groups; you want a **Management Group** column displayed in your results, click the **Result Column?** checkbox next to **Management Group** label.
5. Click **[Search]** at bottom right of your screen.
6. All protocols you have access/permission to see in these management groups will be listed.
7. If you want to refine your search results, click the **[Back to Search]** button.
8. Add more fields to your results by clicking the **Result Column?** checkboxes next to additional fields.
9. Filter out data by using the various **Filter Types** radio buttons listed under most fields:
  - a. Contains Any (OR)
  - b. Contains All (AND)
  - c. Does Not Contain
10. The **Protocol Search Results** can be printed/edited/saved in Excel or PDF formats by clicking **[View Excel]** or **[View PDF]** and then using the print/edit/save functions in Excel or Adobe.
11. To save this search:
  - a. Click the **[Back to Search]** button.
  - b. At the top of the page, click the **[Save As]** button.
  - c. In the pop-up window, type a Name for your search and click **Save**.
  - d. Your saved searches will be available in the drop down list attached to the **Saved Searches** field (upper left corner). They will also appear in the **Saved Searches** widget on the Home page.

## SAMPLE SEARCH: PROTOCOLS BY STATUS WITHIN A DATE RANGE

1. Navigate to **Menu > Protocols > Protocol Search**.
2. Locate the **Protocol Status** data section.

The screenshot shows the 'Protocol Search' interface. At the top, there is a 'Saved Searches' dropdown and a search input field with a 'Save As...' button. Below this, the 'Protocol Status' section is highlighted in yellow. A red box labeled '2' highlights the 'Protocol Status' label. A red box labeled '3' highlights the 'Status' field, which is a 'Multi-Select' dropdown. A red box labeled '4' highlights the 'From Date' and 'Thru Date' fields, which are date pickers. Below these fields, there is a 'Status Change' field, also a 'Multi-Select' dropdown. At the bottom, there are radio buttons for 'Filter Type': 'Contains Any (OR)', 'Contains All (AND)', 'Does Not Contain', and 'First Occurrence'.

3. In the **Status Multi-Select** field(s), pick the status you are interested in from the drop-down list. You can select multiple statuses.
4. Click **[Search]** at bottom right of your screen.
5. All protocols that had any of the statuses you selected at any time during the time range will be listed.
6. If you want to refine your search results, click the **[Back to Search]** button.
7. Add more fields to your results by clicking the **Result Column?** checkboxes next to additional fields.
8. Filter out data by using the various **Filter Types** radio buttons listed under most fields. e.g.:
  - a. Contains Any (OR)
  - b. Contains All (AND)
  - c. Does Not Contain
  - d. First Occurrence
9. The **Protocol Search Results** can be printed/edited/saved in Excel or PDF formats by clicking **[View Excel]** or **[View PDF]** and then using the print/edit/save functions in Excel or Adobe.
10. To save this search:
  - a. Click the **[Back to Search]** button.
  - b. At the top of the page, click the **[Save As]** button.
  - c. In the pop-up window, type a Name for your search and click **[Save]**.
  - d. Your saved searches will be available in the drop down list attached to the **Saved Searches** field (upper left corner). They will also appear in the **Saved Searches** widget on the Home page.

## SAMPLE SEARCH: PROTOCOLS BY STAFF NAME AND/OR STAFF ROLE

1. Navigate to **Menu > Protocols > Protocol Search**.
2. Locate the **Staff** data section.

The screenshot shows the Protocol Search interface. At the top, there are filter type radio buttons: **Contains Any (OR)** (selected), **Contains All (AND)**, and **Does Not Contain**. Below this is a yellow header bar with the **Staff** tab selected. The main search area has a **Result Column?** section with checkboxes for **Staff Name** and **Staff Role**. To the right of these are **Multi-Select** dropdown menus. Below the dropdowns are more filter type radio buttons, a **Only Active Protocol Staff** checkbox, and a **Scope\*** dropdown menu. Annotations include a red box labeled '2' around the 'Staff' tab, a red box labeled '4' around the 'Result Column?' checkboxes, and a red box labeled '3' around the 'Multi-Select' dropdowns.

3. In the **Staff Name** and/or **Staff Role** *Multi-Select* field(s), pick your staff name(s) and/or role(s) from the drop-down list(s). You can select multiple names and roles.
4. If you have selected multiple names/roles, you will want a **Staff Name** and/or **Staff Role** column displayed in your results; click the **Result Column?** checkbox next to the **Staff Name** and/or **Staff Role** label.
5. Click **[Search]** at bottom right of your screen.
6. All protocols that include these names and/or roles will be listed.
7. If you want to refine your search results, click the **[Back to Search]** button.
8. Add more fields to your results by clicking the **Result Column?** checkboxes next to additional fields.
9. Filter out data by using the various **Filter Types** radio buttons listed under most fields. e.g. :
  - a. Contains Any (OR)
  - b. Contains All (AND)
  - c. Does Not Contain
  - d. Only Active Protocol Staff
  - e. Scope (Protocol or Subject)
10. The **Protocol Search Results** can be printed/edited/saved in Excel or PDF formats by clicking **[View Excel]** or **[View PDF]** and then using the print/edit/save functions in Excel or Adobe.
11. To save this search:
  - a. Click the **[Back to Search]** button.
  - b. At the top of the page, click the **[Save As]** button.
  - c. In the pop-up window, type a Name for your search and click **[Save]**.
  - d. Your saved searches will be available in the drop down list attached to the **Saved Searches** field (upper left corner). They will also appear in the **Saved Searches** widget on the Home page.

## SHARE A SAVED PROTOCOL SEARCH

When creating a **new** saved search, you can share it with other users. To do so, click **[Share]** in the **New Saved Search** window and select the desired user(s) in the **Staff Name Multi-Select** field. The selected users will now see a link to the shared search in the **Searches** widget on their home screen.

If you want to share a **previously saved** search, you will need to pull up the saved search, click the **[Save As]** button, select a new name for the search, then click **[Share]** in the **New Saved Search** window and select the desired user(s) in the **Staff Name Multi-Select** field.

## USE PROTOCOL SEARCH TO ADD A STAFF MEMBER TO MULTIPLE STUDIES AT ONCE

Protocol Search can be used to identify protocols to which certain staff members should be assigned. Remember that protocol staff assignments can be used to send notifications, to assign tasks in a task list, and for security purposes. Once the appropriate protocols have been identified, one or more staff members can be assigned to those protocols in bulk.

1. Navigate to **Menu > Protocols > Protocol Search**.
2. Perform a **Protocol Search** that includes the protocols onto which you want to add the staff member.

Protocol No.	Additional Protocol Numbers	Department	PI Name	Current Status	Current Status Date	Priority Score	Add Staff? <a href="#">All</a> <a href="#">None</a>
<a href="#">OCR16497</a>		HP-OCCUPATIONAL THERAPY		NEW	09/06/2017		<input type="checkbox"/>
<a href="#">OCR16500</a>		MD-PATHOLOGY		NEW	09/06/2017		<input type="checkbox"/>
<a href="#">OCR16648</a>	IRB201702378	PH-PHARM OUTCOMES & POLICY-GEN		NEW	09/29/2017	13	<input type="checkbox"/>
<a href="#">OCR17045</a>	MNK14042068	MD-NEUROLOGY		NEW	11/13/2017		<input type="checkbox"/>

3. On the right side of the **Protocol Search Results** screen, locate the **Add Staff? All None** column.
4. Click the checkboxes for the protocols to which you want to add the staff member.
5. Click the **[Add Staff]** button.
6. In the resulting pop-up window:
  - a. Select the **Staff Name** from the drop-down list.
  - b. Select the **Staff Role** from the drop-down list.
  - c. Enter a **Start Date**.

## INACTIVATE A STAFF MEMBER FROM MULTIPLE STUDIES AT ONCE

Protocol Search **cannot** be used to inactivate a staff member from a large number of studies at once - for example, when a study coordinator retires and you want to re-assign all their studies to a new coordinator. To get help with this, contact the OnCore Support team via [OnCore-Support@ahc.ufl.edu](mailto:OnCore-Support@ahc.ufl.edu) or submit a [support help desk ticket](#).