

Person and Sponsor Finders

Some fields require a single person, such as the Primary Contact for a study:

* 1.0 Who is the Primary Contact?

FIND PEOPLE

Click **Find People** to bring up the **Primary Contact** search dialog:

PRIMARY CONTACT

✕ 🔍

Name	Organization	Email	Phone	
Mark Williams	Biomedical	mwilliams@evisions.com	714 824 5678	+
Mark Klein	Biomedical	mklein@evisions.com	714 824 1234	+

Selected Records * Select a single record.

No records selected. Select a record and click **Save** to apply.

⊗ CANCEL SAVE

Type the name or part of the name of the person you are looking for in the search box and click the **Search** icon. Locate the desired person in the list, then click the + button next to their name to add them to the selection. Click **Save** to return to the form.

Other People fields allow you to select more than one person. For example, when you click Find People, the **Investigator** search dialog allows you to select any number of investigators using the + buttons. When you add a person to the selection, the + button changes to a check mark.

INVESTIGATOR

x
Q

Name	Organization	Email	Phone	
Mark Williams	Biomedical	mwilliams@evisions.com	714 824 5678	✓
Mark Klein	Biomedical	mklein@evisions.com	714 824 1234	✓

Selected Records

Mark Williams	x
Mark Klein	x

CANCEL
SAVE

When you have added all the people you wish to include, click Save.

Sponsor finders work exactly the same way as Person finders, except that the search returns matching sponsors instead of people.