

My Profile

User's Manual

Version 11.02

Contents

ntroduction	2
/ly Account	3
Profile	3
Change Password	6
Biosketch, CV, Pubs	7
Training History	9
Medical Licenses	
Signature1	.1
Notes1	.1
Announcements1	.3
Dperating Procedures	.4
/iew Correspondence1	.4
All Department Reports	.6
Department Reports	.7

My Profile

Introduction

The **My Profile** menu group in iRIS[™] is available to all users. It contains various components of your account information, announcements, operating procedures, and a variety of other helpful items (depending on how your system is configured). It is located at the top right section, next to the log out button.

integrated Research Information System	Hello Abby Ack, MSN Ph.D. your last login was 07/02/2019 11:43 AM PDT		🥐 Help 💄 My Profile 🔻	C Log out
	ſ		1	
		SETTINGS		
		My Account		
		Manage Licenses and Certifications		
		Request New Account		
		Change your department		
		RESOURCES		
		Help		
		My Document Library		
		Organization Profile		
		Completed Tasks		
		COMMUNICATIONS		
		Announcements		
		View Correspondence		
		Review Board Meetings		
		REPORTS & CONFIGURATION		
		My Reports		
		All Departments Reports		
		Department Reports		
		Department List Setup		
		SIGNOFF		
		Review Board Letter Signoffs		
		Project Invoice Signoffs		
		Routing Signoffs		

My Account

My Account allows users to quickly access and update personal information, change passwords, look up training history, medical licenses or CVs, upload a .jpg image of the users signature (used when signing off on Outcome letters), set signoff ability, view vaccination history etc.. The availability of these tabs is dependent on how your system is configured; do not be alarmed if your screen is missing one or more menu items. Some screenshots may also vary depending on what features are turned on or off and whether any labels have been renamed by your System Administrator.

When you first click on the **My Account** link, a new page will open listing your personal contact information.

My Workspaces	My Profile	My Account - Abby	Ack, MSN Ph.D.					🖪 Back
								Save Changes
Profile	* Last Name:	Ack	First Name: Abl	by	Middle Name:			
Change Password	Suffix:		Personal Question:					
Contact Management	Prefix:		Personal Answer:					
Performance Sites	Job Title:	Nurse	Contact Information		Use for	System Notifi	cations	
Proposal Info	Status:	Active	(* fields required)			7		
Other System IDs	CITI User Id:		* Email Address:	aack@aol.com Email Address Require	ed		۲	
Biosketch, CV, Pubs	Military Branch:	none 🔻	Phone:					
Training History	Military Rank:	none ▼	Cell Phone: Physical Address:					
Medical Licenses	Military Service Corp:	none	Filysical Address.					
Signature	Academic Position/Title:]					
Signoff Availability	Degree:	MSN Ph.D. V						
Vaccination History	Is Faculty:	Yes No	Street 1:					
Notes	Employee ID:		Street 2:					
Notes	Social Security Number:		City:					
	Specialty:	Add Remove	County/Parish:					

Profile

The Profile tab is where you can view and edit your personal information.

You can change any of the information listed in the screenshot above except for your Department (or Site) association on this screen and your Job Title. This information must be approved and changed by your iRIS[™] Administrator. Additionally, some fields like the phone number, email, employee ID, and others may be read-only if your system operates with an LDAP user directory.

				iic.
Profile	Suffix:	Personal Question:		
Change Password	Prefix:	Personal Answer:		
Contact Management	Job Title: Nurse	Contact Information	Use	for System Notifications
Performance Sites	Status: Active	(* fields required)		
Proposal Info	CITI User Id:	* Email Address:	aack@aol.com Email Address Required	۲
Other System IDs	Military Branch:none	Phone:		
Biosketch, CV, Pubs	Military Rank:none V	Cell Phone:		
Training History	Military Service Corp:none	Physical Address:		
Medical Licenses	Academic Position/Title:			
Signature	Degree: MSN Ph.D. V			
Signoff Availability	Is Faculty: Ores No	Street 1:		
Vaccination History	Employee ID:	Street 2:		
Notes	Social Security	City:		
	Specialty:	County/Parish:		
	Add Remove	State:	none	T
	Relationship to the	Province:		
	Institution Affiliated Non-Affiliated	Country:		V
	Representational capacity Scientist Non-Scientist	Zip/Postal Code:	465465465465465	
	Representative of	MailStop:		
	specific entity: Add Remove		Department(s)	
	PI status waiver required Yes No	Entomology		

It is now possible to turn off and on the visibility of many of the fields on the Profile tab via system properties, as well as set whether or not they are required. These properties are available under System User Profile Settings.

Two configurable fields are also now available. These fields can be configured under System Administration > List Configuration and Maintenance > System Setup > Setup System Labels. The Configurable Fields appear under the List of Labels for System on the System Label screen.

There are also new editable fields. When the system property "system.use_military_info" is set to "Yes," you will be able to edit the Military Branch, Military Rank, and Military Service Corps under My Account Information.

Profile	* Last Name: A	Ack		First Name:	Abby	Middle Name:	
Change Password	Suffix:			Personal Question:			
Contact Management	Prefix:			Personal Answer:			
Performance Sites	Job Title: N	lurse		Contact Information		Use for S	System Notifications
Proposal Info	Status: Ad	ctive		(* fields required)			
Other System IDs	CITI User Id:			* Email Addre	aack@aol.com Email Address Require	d	۲
Biosketch, CV, Pubs	Military Branch: A	Air Force 🔻		Pho	ne:		
Training History	Military Rank: C	Captain (Capt.)	2	Cell Pho Physical Addre			
Medical Licenses	Military Service Corp: N	Medical Services (MS) ▼		Filysical Addre			
Signature	Academic Position/Title:						

A new property has been added under System Administration > System Configuration > System User Profile Properties that adds another field on the My Account page in My Profile. If you are using CITI at your institution, and the property is turned on, users will be able to add their CITI User ID in a new field.

The property is under System Administration > System Configuration > System User Profile Properties, > system.show_CITI_ID. It will show the new field where users can input their CITI User ID if the property is set to "Yes". When set to "No", the user will not be able to see the option to input their CITI User ID.

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Profile	* Last Name: Ack	First Abby Middle Name:
Change Password Contact Management	Suffix: Prefix:	Personal Personal
Performance Sites	Job Title: Nurse	Answer:
Proposal Info	Status: Active	Contact Information Use for System Notifications
Other System IDs	CITI User Id:	(* fields required)
Biosketch, CV, Pubs	Military Branch:none 🔻	* Email Address: laack@aol.com Email Address Required
Training History	Military Rank:none V	Additional Email Addresses: Add Remove
Medical Licenses	Military Service Corp: None	
Signature	Academic Position/Title:	aack@research.institution.org
Signoff Availability	Degree: MSN Ph.D. V	Phone:

Remember to click on the **Save Changes** button whenever you make changes to this page. Otherwise, when you exit this page, your changes will not be applied. (Some fields may be designated as required as described above and you cannot click **Save Changes** until they are entered.)

Note: It is important to have your current e-mail address listed. iRIS[™] sends out important notifications regarding your projects. If you do not have your correct email address, you will not receive these notifications.

Additional email addresses can now be stored under a users' profile in My Profile. System Administrators must turn on the property in order to allow users to have additional email address.

The property is located under System Administration > User Accounts > System Configuration > System User Profile Settings > *system.show_addt'l_email_address.*

When this property is set to "No", the option to add an additional email address is not available.

Profile	* Last Name:	Ack	First Abby	Middle Name:	
Change Password	Suffix:		Personal		
Contact Management	Prefix:		Question: Personal		
Performance Sites	Job Title:	Nurse	Answer:		
Proposal Info	Status: /	Active	Information	Use for Sys	tem Notifications
Other System IDs	CITI User Id:		(* fields required)		_
Biosketch, CV, Pubs	Military Branch:	none v	* Email Address: /	abby.ack@imedris.com Email Address Required	۲
Training History	Military Rank:	none V	Phone:		
Medical Licenses	Military Service Corp:	none 🔻	Physical Address:		
Signature	Academic Position/Title:		,		
Signoff Availability	Degree:	MSN Ph.D. V			
Vaccination History	Is Faculty:	Ves No			
Notes	Employee ID:		Street 1:		
1000	Social Security				

When this property is set to "Yes", the option to add an additional email address is available under My Profile > My Account.

Profile	* Last Name: Ack	First Name: A	Abby	Middle Name:	
Change Password	Suffix:	Personal Question:			
Contact Management	Prefix:	Personal Answer:			
Performance Sites	Job Title: Nurse	Contact Information		Use for Sys	stem Notifications
Proposal Info	Status: Active	(* fields required)			
Other System IDs	CITI User Id:	* Email Addres	abby.ack@imedris.com Email Address Require	ed	۲
Biosketch, CV, Pubs	Military Branch:none V	Additional Ema Addresse			
Training History	Military Rank:none V				
Medical Licenses	Military Service Corp:none		aack@research.i	nstitution.org	\bigcirc
Signature	Academic Position/Title:	Phon	e:		
Signoff Availability	Degree: MSN Ph.D. ▼	Cell Phon			
		Dhusical Addres			

When the button **Add** is clicked, another pop-up will appear where the administrators or users can add the additional email.

Additional Email Addresses:	Email address:	
Phone:	Submit Cancel	
Cell Phone:		

When another user has added another email, the user can set the additional email address as their preferred email address for system notifications by clicking on the radio button.

Profile	* Last Name: Ack	First Abby Middle Name:
Change Password	Suffix:	Personal
Contact Management	Prefix:	Question:
Performance Sites	Job Title: Nurse	Personal Answer:
Proposal Info	Status: Active	Contact Information Use for System Notifications
Other System IDs	CITI User Id:	(* fields required)
Biosketch, CV, Pubs	Military Branch:none v	* Email Address: laack@aol.com Email Address Required
Training History	Military Rank:none V	Additional Email Addresses: Add Remove
Medical Licenses	Military Service Corp:none	
Signature	Academic Position/Title:	aack@research.institution.org
Signoff Availability	Degree: MSN Ph.D. V	Phone:

This will change email that the system will send the system notifications to.

Note: The System Administrator has the ability to add customized links to the My Profile tab. The property *system.use_custom_menus*, within System Administration -> System Configuration -> System Default Settings allows the

System Administrator to turn on or off this feature. These links may either be Internal or External. The Internal links will link directly to a page within iRIS.

Change Password

Click on the Change Password tab to change your password.

My Workspaces	V	My Profile	My Account - Abby Ack, MSN Ph.D.	🖪 Back
				Save Changes
Profile Change Password			*Old Password:	
Contact Management			*New Password:	
Performance Sites Proposal Info		*N	lew Password Verify:	

This will open a page similar to the one shown in the screenshot above. In order to change your password, you must supply your **Old Password**, enter in the desired **New Password**, and verify the desired **New Password** in the section **New Password Verify**. Click **Save Changes** to complete the change in your password. Your instance of iRIS may have settings that does not allow you to use the last few passwords you have used in the past.

Biosketch, CV, Pubs

You can upload and view your Biosketch, CV, and Publications from this tab.

My Workspaces		My Prot	Profile My Account - Abby Ack, MSN Ph.D.			🖪 Back
0						
Profile	Currio	culum Vi	tae (CV) or Biosketch			Add CV or Biosketch
Change Password	Remov	e Edit	Document Type	Version Date	Title	View Document
Contact Management Performance Sites	8	2	Curriculum Vitae (CV)	07/25/2019	Current CV 2019	
Proposal Info	Public	ations				Add Publication
Other System IDs	Remov	e Edit	Publication Type	Publication date	Publication Title	View Attachment
Biosketch, CV, Pubs	No Pub	lication has	been added.			
Training History						

The above screenshot is what your Biosketch, CV, and Publications page may look like. From this page you will be able to upload your professional experience and other relevant work you have conducted. This tab will contain any Curriculum Vitae/Biosketch/Publications you may have stored in iRIS. All three of these documents can be added by you or your System Administrator.

Remove a Document – To delete the CV/Publications record from iRIS, click the **S** button in the Remove Column.

Edit a Document – Clicking the 📉 icon in the Edit column opens up the specific, editable details for the document.

Document Type – Category of Document chosen to upload.

- Version Date Date of the uploaded version.
- Title Title of the document uploaded.

View Document – The icon of the document opens a new window that will display the uploaded document.

Add a CV or Biosketch – Click on the Add CV or Biosketch button to open a new page similar to the one shown in the screenshot below.

My Workspaces	My Profile My	Account - Abby Ack, MSN Ph.D.	¢
		Save Uploaded File to iRI	s
Profile			
Change Password	Edit the Document You Selected		
Contact Management Performance Sites		Curriculum Vitae (CV)	
Proposal Info	*Document Type:	Biosketch	
Other System IDs	*Title:		
Biosketch, CV, Pubs	Version Date:		
Training History			
Medical Licenses			
Signature Signoff Availability	Load the document into iRIS:	Drag your file here or click in this area.	
Vaccination History	Load the document into IRIS:		
Notes		Name View the Document Download the Document	
		No Document has been uploaded.	

In the above screen shot you can determine which document type you wish to upload. In this particular case, we will be uploading a **Curriculum Vitae (CV)** so we will select the corresponding button.

Document Type – The type of document being uploaded – either a Curriculum Vitae (CV) or a Biosketch.

Title – The title of the CV (*required field).

Version Date – The version date of the CV.

Load the document into iRIS – Click on the **Upload** button to upload your CV document into iRIS. The document must be either .doc or .rtf file format in order for iRIS to accept the upload. You can also choose to drag and drop your file into the box outlined in a dotted line.

*Document Type:	 Curriculum Vitae (CV) Biosketch 		
*Title:	Current CV 2019		
Version Date:	07/25/2019		
Load the document into iRIS:	Drag your file her Name	e or click in this are View the Document	a. Download the Document
	Resume_36.docx		Download

After you upload a document, the page will refresh and a Word icon will populate to the left of the CV information When you are finished adding the information for the CV, click **Save Uploaded file to IRIS** button and you will be returned to the previous screen.

Click **Add Publication** and the following screen will appear. Each publication entry can have a Publication Type, Publication Title, and Publication Date. The publication document itself can be loaded as an attachment. Additionally, each publication listing can be associated to a particular project or study and/or certain keywords.

My Workspaces	My Profile	My Account - Admin A admin, Ph.D. Brig. Gen.		🖪 Back
				Save Changes
Profile Change Password	Publication Type : N	one • or New Type		
Contact Management	Publication Title :			
Performance Sites Proposal Info	Publication Date :			
Other System IDs		Delete Edit	Title	Add File Attachment
Biosketch, CV, Pubs	File Attachment :	No File Attachment has been added		
Medical Licenses				Add Study Association
Signature	Study Association :	Delete No Association has been added	Study Title	
Signoff Availability Vaccination History				Add Project Association
Notes	Project Association :	Delete No Association has been added	Project Title	
				Add Keyword
	Keyword :	Delete No Keyword has been added	Keyword	

Training History

You can view your training history by clicking on this tab.

My Workspaces	V	My Profile	My Account - Abby Ack, MSN Ph.D.				【 Back
Profile	_						
Change Password		n <mark>g Course</mark> I Welfare Act Requ	ations	Course Date	Course Expiration	Score	Add a New Document
Contact Management Performance Sites	Workin	g with the IACUC	Basic Course	01/01/2013	01/01/2014		Add a New Document
Proposal Info Other System IDs							
Biosketch, CV, Pubs							
Training History							
Medical Licenses							

The screenshot above is an example of what the Training History page may look like. The items listed in the table may include: associated **Training Group**, the **Course** title, **Course Date** (the day the training was taken), **Course Expiration** (date the training expires), and the **Score** received for the training. All information must be approved and changed by your iRIS Administrator.

Medical Licenses

Any Medical Licenses you may have can be found in this tab. You and/or the Administrator can upload this information.

My Workspaces	V	My Profi	le My Account - Abby	Ack, MSN	Ph.D.			🚺 Bac
	Medica	l License	25					Add License
Change Password Contact Management	Remove	Edit/View	License Number	View License	Version Date	License Type	Expiration Date	State of Issue
Performance Sites	8	\mathbf{N}	AX19606	PNG	06/01/2017	Medical	06/30/2020	CALIFORNIA
Proposal Info Other System IDs	8	×	MED_057		06/01/2020	Medical	06/30/2017	CALIFORNIA
Biosketch, CV, Pubs								
Training History								
Medical Licenses								

Remove License– To delete a Medical License record, click the 🙆 icon in the Remove column.

Edit/View – Click on the kicon in this column to open up the details for the specific license you wish to view. This is where you can find editable details for the Medical License record and make any necessary changes.

License Number – Number of the License for reference.

View License – Click on the icon in this column to open a document viewer and see the attached document.

Version Date – The version date of the medical license.

License Type – Type of License uploaded.

Expiration Date – Date when the License will expire.

State of Issue – State where the license was issued to the user.

Add License – Click on the Add License button to add a document. This will open a new page like the one shown below:

My Workspaces	My Profile	My Account - Admin A admin, J.D. Brig. Gen.	💽 Back
			Save Changes
Profile			
Change Password	License Typ	e:	
Contact Management	License Numbe	175-2180	
Performance Sites	Expiration Date	e: 07/29/2021	
Proposal Info	State of Issue		
	Version Dat	e: 07/02/2019	
Other System IDs			
Biosketch, CV, Pubs			
Training History		Drag your file here or click in this area.	
Medical Licenses			
Signature	Load the document into iRI	S:	
Signoff Availability		Name View the Document Download the Document	
Vaccination History		Name View die bodament	
Notes		tmp_1_0_License.docx Download	

License Type – Select the type of license that you are adding from the drop-down menu or, if not listed, you may add a license type by entering the selection in the **New Type** text box.

Note: If you enter a New Type, once you save your Medical License, it will be added to the list of License Types and other users will have the option to select it as well. Keep this in mind so that you do not enter personal information in the New Type field.

License Number – The medical license number.

Expiration Date – The expiration date for this specific medical license.

State of Issue - Select the state that issued your medical license from a drop-down list.

Version Date – The version date of the medical license.

Load the document into iRIS – Click Upload and you can attach a document or drag and drop the file into the dotted line box to upload the document.

My Workspaces		My Profile	My Account - Admin A admin, J.D. Brig. Gen.	🖪 Back
				Save Changes
Profile				
Change Password		License	Type:none V or New Type X-Ray Technician	
Contact Management		License Nur	aber: 75-2180	
Performance Sites		Expiration D	ate: 07/29/2021	
		State of Is	sue:none V	
Proposal Info		Version I	Date: 07/02/2019	
Other System IDs				
Biosketch, CV, Pubs				
Training History				
Medical Licenses			Drag your file here or click in this area.	
Signature	Load t	he document into	RIS:	
Signoff Availability				
Vaccination History			Name View the Documen Download the Document	
Notes			tmp_1_0_License.docx Download	

Download the Document – Click Download and confirm by clicking the **Confirm** button and click **Cancel** to cancel the download. The file will automatically start downloading. The following screen shows the download function for Google Chrome, other browsers may have a slightly different download function.

When you finish entering information and attaching the required document, click the Save Changes button.

Signature

Users can upload a .jpg of their signature by clicking on this tab, then clicking anywhere in the box with the dotted line to upload the document. You can also drag and drop the file into the box as well to upload the signature.

My Workspaces	V	My Profile	My Account - Abby Ack, MSN Ph.D.	🖪 Back
Profile	Signat	ure		
Change Password	0	0		
Contact Management	04	TI UY	(1)	
Performance Sites	J	004 TI	$c\kappa$	
Proposal Info		1		
Other System IDs	r			
Biosketch, CV, Pubs				
Training History				
Medical Licenses		Drag yo	bur file here or click in this area.	
Signature				
Signoff Availability	L	Delete		
Vaccination History				
Notes				

Note: The image that displays on the screen will shrink down to a smaller size when the actual image is applied to a document.

The uploaded signature is used when an electronic signature is applied to an Outcome Letter, or, if configured, to insert department signatures in a PDF version of a submission form. To remove the uploaded signature, click the **Delete** button.

Notes

Any notes you may have can be found in this tab. You and/or the Administrator can upload this information.

My Workspaces	My Profile	My Account - Abby Ack, MSN Ph.D.		📧 Back
1				
Profile				Add a New Note
Change Password	0 result(s) found			
Contact Management				
Performance Sites		e Content	Added By	Occurrence Date
Proposal Info	No notes have been ente	red.		
Other System IDs				
Biosketch, CV, Pubs				
Training History				
Medical Licenses				
Signature				
Signoff Availability				
Vaccination History				
Notes				

Click **Add a New Note** to add a new note. **The Occurance Date** (*required field) must be entered in order to create a new note. Once you have filled in the appropriate text, you will need to click the **Save Note** button to save the entry. If you do not save the note, the entered text will be lost.

Back
ave Note

Once the note has been added, you can click the icon to view or make any edits to the published notes. Click the column to delete a note. This allows the user to delete the requested note.

My Workspaces		My Profile	My Account - Abby Ack, MSN Ph.D.		🖪 Back
_					
Profile					Add a New Note
Change Password					
Contact Management	1 result	(s) found			
Performance Sites	Delete	Edit Note	Content	Added By	Occurrence Date
Proposal Info	8	Rem	ember to check on Subject 346 and 351 by August 5th.	Ack, Abby	07/26/2019
Other System IDs					
Biosketch, CV, Pubs					
Training History					
Medical Licenses					
Signature					
Signoff Availability					
Vaccination History					
Notes					

Announcements

When a System Administrator needs to contact every user in the system, they can post an announcement which will appear at the top of the system. The notification will show up as a red pop-up number, indicating how many notifications are there. The user can click on the link which will take the user to view the announcement. Once the announcement has been viewed, the red notification will disappear.

Integrated Information System Hello Abby Ack, MSN Ph.D. your last login was 07/25/2019 04:13 PM PDT	Announcements 1 ? Help	My Profile - C+ Log out
---	------------------------	-------------------------

Clicking the link brings you to the System User Announcement screen where you can view the announcement.

iRIS by iMedRIS Integrated Research Information System		ount: Abby Ack, MSN Ph.D. artment: Admin - Redlands I: Home		(?) Help	My Profile 🔻	C+ Log out
My Workspaces 🔳	My Profile	System User Announcement				🚺 Back
47 result(s) found						1 - 10 🕨
Date Posted			Announcement(s)			* -
July 26, 2019 View Post		system will be down from Friday, 7/26, 9:00 PM to Sunday, 7, r coorperation.	28, 9:00 PM: Please make sure to save and or o	download what	ever work you may need.	Thank you for
March 28, 2019						

You can view all of the current system announcements by clicking on the Announcements tab under My Profile, or by clicking on Announcement link on the top.

COMMUNICATIONS
Announcements
View Correspondence
Review Board Meetings

Clicking on the **View Post** button will bring up a new browser window (as shown in screenshot below). You can Close or Print this message by clicking on the appropriate buttons.

integrated Research Information System	Accou Depar Path:	nt: Abby Ack, MSN Ph.D. ment: Admin - Redlands Home		(?) Help	My Profile 👻	C Log out
My Workspaces 🔳	My Profile	System User Announcement				🖪 Back
47 result(s) found						1 - 10 🕨
Date Posted		Аг	nnouncement(s)			Î
July 26, 2019 View Post		ystem will be down from Friday, 7/26, 9:00 PM to Sunday, 7/28, 9:00 oorperation.) PM: Please make sure to save	ve and or download wha	atever work you may need	d. Thank you for
March 28, 2019 View Post	-	e system will be down from Friday, 7/26, 9:00 PM to Sunday, 7/28, 9:00 PM - Google Chrome Not secure iris-qa1,	- D)	× @		
March 28, 2019 View Post			Print Close			
March 26, 2019 View Post	e.	The system will be down from Friday, 7/26, 9:00 PM to PM	o Sunday, 7/28, 9:00			
February 06, 2019 View Post		Please make sure to save and or download whatever work you may your coorperation.	7 need. Thank you for			

Operating Procedures

This section is used for your site's Standard Operating Procedures (SOP's). It is located under the Help section. Each site will have a different list of procedures. Different options are possible depending on the setup of this page.

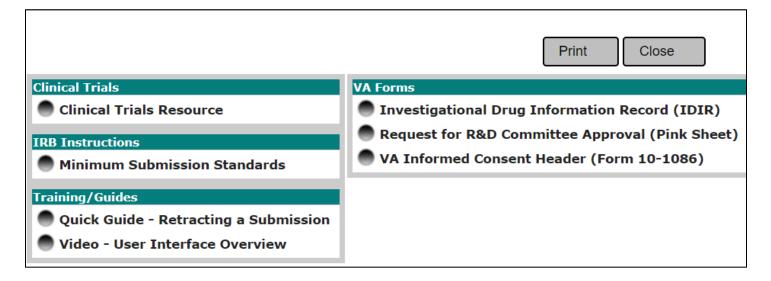


Link to a Website – The SOP can be linked to a website within your network or to an outside web page (i.e. OHRP.com, FDA.com). The software will automatically open up a new browser window.

Link to Text – If the SOP is documentation not on a website, it might be captured as a text file. This will also load in a new browser window for your convenience.

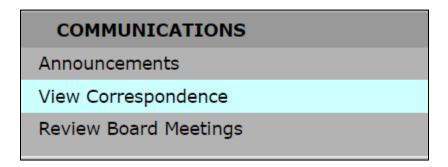
Link to Attached Document – Typically this is a PDF upload of the SOP. This will also open in a new window.

To view an SOP, click on the link. The SOP will open in a new browser window.



View Correspondence

When you receive correspondence from iRIS, generated from a notification or sent from the review board or study team, it is available for viewing under the View Correspondence link.



My Wo	rkspaces 🔳 My Profile	View Correspo	Indence	🖪 Bi	ack	
Search Cor	Search Correspondence by Keyword : Search New Correspondence O Previously Read Correspondence					
63 result(s)	found			1	- 20 🕨	
Open	Study Number	Project Number	Task Details	Z A + Date Received		
1	Visual Motion Acuity		Reviewer has exceeded their allotted review time	2019-07-25 11:19:03.163		
× 1	Visual Motion Acuity		Reviewer has exceeded their allotted review time	2019-07-25 11:19:03.15		
	Visual Motion Acuity		Study Notification Reminder for Review and Signoff	2019-07-25 11:19:03.1		
× 1	BDA 123		Outcome Letter Notification	2019-07-24 12:37:48.82		
1	BDA 123		Submission Received	2019-07-24 12:26:30.01		

From the View Correspondence screen, you can search for correspondence by keyword. Enter your search terms in the Search Correspondence by Keyword field and click **Search**.

My Wo	rkspaces 🗷 My Profile	View Correspor	ndence	【 Back			
Search Cor	Search Correspondence by Keyword : application Search Search						
63 result(s)	found			1 - 20 🕨			
Open	Study Number	Project Number	Task Details	Z A + Date Received			
	Visual Motion Acuity	I	Reviewer has exceeded their allotted review time	2019-07-25 11:19:03.163			
×	Visual Motion Acuity	1	Reviewer has exceeded their allotted review time	2019-07-25 11:19:03.15			
	Visual Motion Acuity	C.	Study Notification Reminder for Review and Signoff	2019-07-25 11:19:03.1			
<u></u>	BDA 123		Outcome Letter Notification	2019-07-24 12:37:48.82			
N 111	BDA 123		Submission Received	2019-07-24 12:26:30 01			

You can toggle between "New Correspondence" and "Previously Read Correspondence" by selecting the corresponding radio button. Once a Correspondence has been read, it will move into the "Previously Read Correspondence" filter.

My Wor	rkspaces 🔳 My Pr	rofile View Correspo	ondence			🖪 Back
Search Cor	respondence by Keyword :	application	iearch	New Correspondence Previously Rea	ad Correspondence	
63 result(s)	found					1 - 20 🕨
Open	Study Number	Project Number	Task Deta	ils	Z Date Receive	ed
	Visual Motion Acuity		Reviewer has exceeded their allotted review time		2019-07-25 11:19:03.163	
<u>}</u>	Visual Motion Acuity		Reviewer has exceeded their allotted review time		2019-07-25 11:19:03.15	
	Visual Motion Acuity		Study Notification Reminder for Review and Signoff		2019-07-25 11:19:03.1	
<u>></u>	BDA 123		Outcome Letter Notification		2019-07-24 12:37:48.82	
N	PDA 122		Submission Received		2010 07 24 12:26:20 01	

To view the details of a message, click the icon in the Open column. This will open a screen similar to the one shown below.

My Workspaces 💌 My Profile	View Correspondence	🖪 Back
Posted: 07/25/2019 11:19 AM PDT	*Content	
*Send Email 🧭	The reviewer of study: Copy of Visual Motion Acuity for the PI: Administrator has exceeded their alloted relivew time.	
*Subject		
Reviewer has exceeded their allotted review time		
* Recipient(s):		
Administrator		
Additional Recipients(s):		
Attachments		
No Attachments have been added to this message		

All Department Reports

This section is for your site's All Department Reports. You will be able to run reports based off of numerous criteria, falling into categories including Financial Tracking, General, License, Studies by, Subject Tracking, Subject Tasks, Submission Tracking, and User's Schedule. The System Administrator has the ability to give access to other reports if needed – please contact your System Administrator if you would like to add or remove access to a certain report.

REPORTS & CONFIGURATION	
My Reports	
All Departments Reports	
Department Reports	
Department List Setup	

My Workspaces My Profile Reports	🖪 Back
Run Reports	
Financial Tracking	Submission Tracking
Study Financial Summary Study Sponsors Summary Subject Count Summary Subject Count Summary	Submissions In Process Studies due Expiration Submission Package Tracking
Subject Protocol Status- Form Studies By	
 Studies By Department Studies By Institution Studies By Parent Department 	

Above is a screen shot of what the all department reports may look like. To run a report, you should select the report you would like to run. We will run a "Studies by Department" report under the "Studies By" header.

My Workspaces 🔳	My Profi	le	Studies By Department	🖪 Back
			Helpful Information	Run Report
Display	Report as:	PDF	HTML Excel	
Please Select a Department/	Site Name	All		
Please Select Department/	Site Code	All		
Please Select So	hool Code	All 🔻		
Select st	udy status /	All	Ŧ	

In the above screenshot, the user will be given the option to display the report as a PDF, HTML or Excel file. The user will also be able to select the Department/Site Name, Department/Site Code, School Code, and Study Status parameters for the reports. Next, click the **Run Report** button. The report will then be created and will appear in another window and will be available to be downloaded.

My Workspaces 🔳	My Profile	Studies By Department		🖪 Back
			Helpful Information	Run Report
Display Re	port as: 💿 PDF	HTML Excel		
Please Select a Department/Sit	e Name Genera	Hospital T		
Please Select Department/Si	ite Code 800			
Please Select Scho	ol Code 7543			
Select study	y status Pendin	- Submitted for Initial Review		

Department Reports

This section is to run department-specific reports. This section is very similar to All Department Reports. When a user is associated with more than one department, they will need to toggle between departments to run reports for each. This can be done on the home screen by selecting **Change your Department**.

	SETTINGS
	My Account
	Change your department
GHW - 7543 - General Hospital	RESOURCES
GHOSP - Grants Office	RESOURCES
	Help
	My Document Library

Selecting a default department is required for running department reports. Click on the department you wish to have set as your default.

Below is a screen shot of what the department reports may look like, again, these options are controlled by your System Administrator. Select the report you wish to run. As an example, we will run a "Studies by Status" under the "Studies by" header. Click the "Studies by Status" link.

My Workspaces My Profile Reports	🖬 Back
Run Reports	
Accessible Depts - General	License
Review Boards History	License Expiration
General	Studies By
Submissions In Process	Studies by Status

In the below screenshot, the user will be given the option to display the report as a PDF, HTML, or Excel file. The user will also be able to select a Study Status parameter to run reports on only the chosen status. Run the report by clicking the **Run Report** button. The report will then be created and will appear in another window and will be available to be downloaded.

My Workspaces	V	My Profile	Studies by Status	🚺 Back
				Helpful Information Run Report
Display Report as: Image: Description: D				
Ple	ase sele	ct a Status Retu	Irned for Corrections	