



MY ASSISTANT

User's Manual

Version 10.03.02

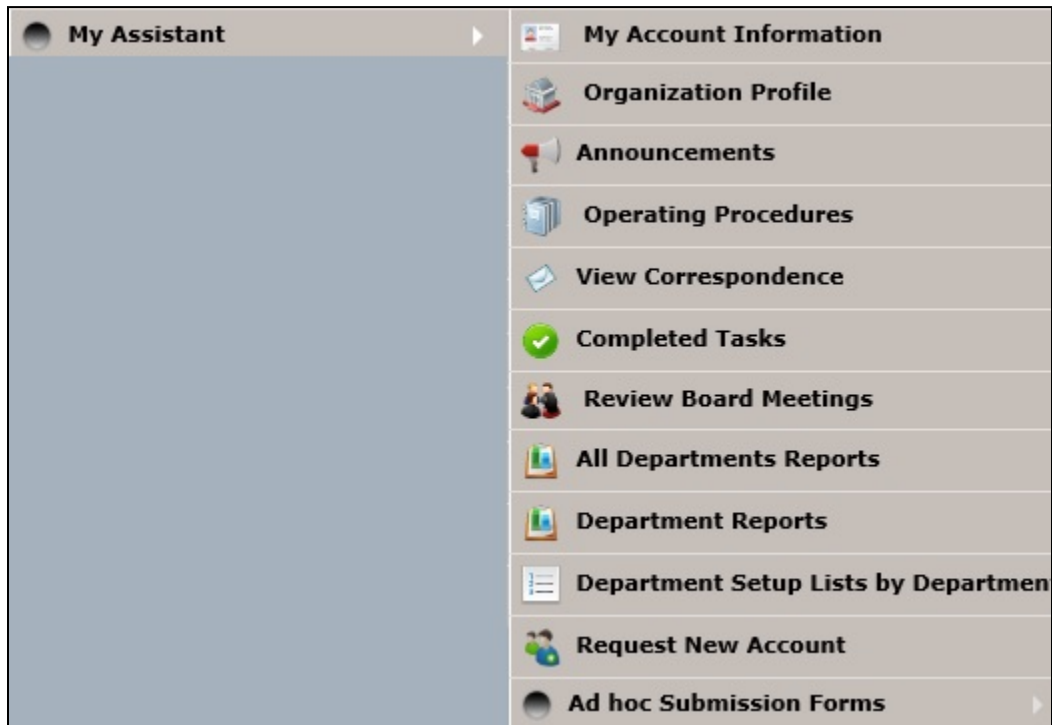
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My Assistant

Introduction

The **My Assistant** menu group in iRIS™ is available to all users. It contains various aspects of your account information, announcements, operating procedures, and a variety of other helpful items (depending on how your system is configured).



My Account Information

My Account Information allows users to quickly access and update personal information, change passwords, add or view any posted training records, medical licenses or CVs, upload a .jpg image of the users signature (used when signing off on Outcome letters), complete a financial disclosure, set signoff ability, and view vaccination history. 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 Information** link, a new page will open listing your personal contact information

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.

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.

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 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.

Note: The System Administrator has the ability to add customized links to the My Assistant 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 Account - Susan Investigator Back

Save Changes

Profile	<p>*Old Password: <input type="text"/></p> <p>*New Password: <input type="text"/></p> <p>*New Password Verify: <input type="text"/></p>
Change Password	
Contact Management	
Proposal Info	
Other System IDs	
Biosketch, CV, Pubs	

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 appropriate fields. Click **Save Changes** to complete the change in your password. Your instance of iRIS may have settings that do 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 Account - Susan Investigator Back

Profile	Curriculum Vitae (CV) or Biosketch					+ Add CV or Biosketch
Change Password	Remove	Edit	Document Type	Version Date	Title	View Document
Contact Management			Curriculum Vitae (CV)	10/27/2016	cv	
Proposal Info	Publications					+ Add Publication
Other System IDs	Remove	Edit	Publication Type	Publication date	Publication Title	View Attachment
Biosketch, CV, Pubs	No Publication has been added.					
Training History						
Medical Licenses						

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 button in the Remove Column.

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

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

Add a New 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.

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.

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.

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.

Note: If you enter a New Type of publication, once you click **Save Changes**, this new type will be added to the list of Publication 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.

Training History

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

My Account - Susan Investigator ◀ Back

<ul style="list-style-type: none"> Profile Change Password Contact Management Proposal Info Other System IDs Biosketch, CV, Pubs <li style="background-color: #e6f2ff;">Training History 	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #e6f2ff;"> <th style="text-align: left;">Training Group - Course</th> <th style="text-align: left;">Course Date</th> <th style="text-align: left;">Course Expiration</th> <th style="text-align: left;">Score</th> </tr> </thead> <tbody> <tr> <td colspan="4" style="text-align: center; padding: 5px;">No training records have been added to this user</td> </tr> </tbody> </table>	Training Group - Course	Course Date	Course Expiration	Score	No training records have been added to this user			
Training Group - Course	Course Date	Course Expiration	Score						
No training records have been added to this user									

The screenshot above is an example of what the Training History page may look like. The items listed in the table may include: the 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. In this screenshot, no training courses have been applied to the user. This 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 Account - Susan Investigator ◀ Back

<ul style="list-style-type: none"> Profile Change Password Contact Management Proposal Info Other System IDs Biosketch, CV, Pubs Training History <li style="background-color: #e6f2ff;">Medical Licenses 	<div style="display: flex; justify-content: space-between; align-items: center;"> <div> Medical Licenses </div> <div style="text-align: right;"> + Add License </div> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr style="background-color: #e6f2ff;"> <th style="width: 10%;">Remove</th> <th style="width: 10%;">Edit/View</th> <th style="width: 20%;">License Number</th> <th style="width: 10%;">View License</th> <th style="width: 10%;">Version Date</th> <th style="width: 30%;">License Type</th> <th style="width: 10%;">Expiration Date</th> <th style="width: 10%;">State of Issue</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"></td> <td style="text-align: center;"></td> <td style="text-align: center;">12345</td> <td style="text-align: center;"></td> <td style="text-align: center;">10/01/2016</td> <td style="text-align: center;">Medical</td> <td style="text-align: center;">10/25/2018</td> <td style="text-align: center;">ARKANSAS</td> </tr> </tbody> </table>	Remove	Edit/View	License Number	View License	Version Date	License Type	Expiration Date	State of Issue			12345		10/01/2016	Medical	10/25/2018	ARKANSAS
Remove	Edit/View	License Number	View License	Version Date	License Type	Expiration Date	State of Issue										
		12345		10/01/2016	Medical	10/25/2018	ARKANSAS										

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

Edit/View – Click on the icon 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.

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

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

My Account - Susan Investigator Back

Save Changes

Profile	License Type: Medical <input type="text"/> or New Type <input style="width: 100px;" type="text"/>						
Change Password	License Number: 12345						
Contact Management	Expiration Date : 10/27/2016 <input type="text"/>						
Proposal Info	State of Issue : AL <input type="text"/>						
Other System IDs	Version Date: 10/27/2016 <input type="text"/>						
Biosketch, CV, Pubs	<input type="button" value="Upload..."/>						
Training History	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%; padding: 2px;">Name</th> <th style="width: 25%; padding: 2px;">View the Document</th> <th style="width: 25%; padding: 2px;">Download the Document</th> </tr> </thead> <tbody> <tr> <td style="padding: 2px;">tmp_51748_0_License.docx</td> <td style="padding: 2px; text-align: center;"></td> <td style="padding: 2px; text-align: center;"><input type="button" value="Download ..."/></td> </tr> </tbody> </table>	Name	View the Document	Download the Document	tmp_51748_0_License.docx		<input type="button" value="Download ..."/>
Name	View the Document	Download the Document					
tmp_51748_0_License.docx		<input type="button" value="Download ..."/>					
Medical Licenses	Load the document into iRIS:						
Signature							
Disclosures							

License Type – Select the type of license that you are adding from the dropdown 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 dropdown list.

Version Date – The version date of the medical license.

Load the document into iRIS – Click Upload and you can attach a document.

Download the Document – Click Download, and confirm by clicking the OK button. You will be brought to a new page containing instructions on downloading items from iRIS. A yellow bar may populate at the top of your browser. Click the bar and indicate in the menu **Download File...**

Download the License Back

Instructions:
Step 1: If your browser blocks pop-ups, then after a few moments a bar similar to the one shown below may appear in your browser.

 Simply click on the bar and a small drop down list will appear. Click **Download File** from the list of options.

Step 2: In a few moments, your browser will prompt you to either **Open** or **Save** the file (see example below). Note: this is not the actual File Download box, it is only a picture. In order to Check-out the document and edit it, you will need to **Save** it to your workstation.

To do so, click **Save**. This will open up a window similar to the one shown below that allows you to choose where in your workstation you would like to save the document. Once you've selected where you will save the document, click **Save**. After this, the Download Complete box will appear as shown below. From here you can choose to open the document to edit it, open the folder that contains the document, or Close the Download Complete box to edit the document later.

Step 3: IT IS VERY IMPORTANT that after you've saved the file to your workstation and closed the Download Complete box that you click the **Download Complete** button in iRIS. This allows you to check the document (or upload the document) back into iRIS once you've finished editing it. To cancel the Document Check-out, click **Cancel**. Note: If you've already saved the file to your computer, the file will remain in your computer, however you will simply lose the option of checking the document back in.

This will cause a popup window that will allow you to **Save** the document to your computer. You can choose where to save the document, and then click the **Download Complete** button to return to the Medical License page.



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 the **Upload** button.

Profile	Signature
Change Password	<input type="button" value="Upload..."/>
Contact Management	
Proposal Info	
Other System IDs	
Biosketch, CV, Pubs	
Training History	
Medical Licenses	
Signature	

A popup will open, allowing you to browse your computer for the necessary file. Locate the .jpg and upload it to iRIS. There will be no save button on this page after the file is uploaded; it will be automatically saved.

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 Account - Susan Investigator Back

Profile | Change Password | Contact Management | Proposal Info | Other System IDs | Biosketch, CV, Pubs | Training History | Medical Licenses | Signature | Disclosures | Signoff Availability | Vaccination History | **Notes**

+ Add a New Note

1 result(s) found...

Delete	Edit	Note Content	Added By	Occurrence Date
		Note test.	Investigator, Susan	10/27/2016

Add a New Note- Click this button to add a new note.

Edit - The icon in this column allows you to view or make any necessary corrections to a published note.

Delete Note – Click the icon in the Delete column to delete a note. Allows the user to delete the requested note.

To add a new note, click the **Add a New Note** button and this screen will populate. 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. If you do not save the note, the entered text will be lost.

My Account - Susan Investigator Back

Profile | Change Password | Contact Management | Proposal Info | Other System IDs | Biosketch, CV, Pubs | Training History | Medical Licenses | Signature | Disclosures | Signoff Availability | Vaccination History | **Notes**

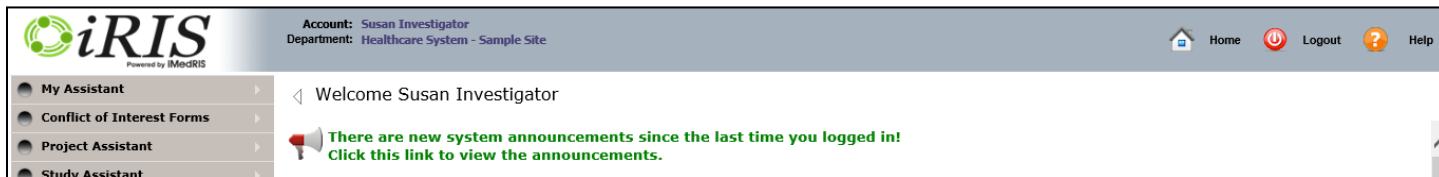
Save Note

*Occurrence Date:

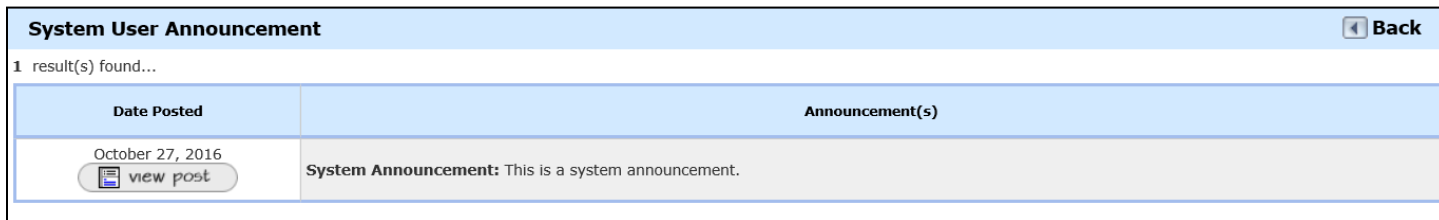
Rich text editor toolbar: ABC, Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Font Color, Background Color, Text Color, Text Background Color, Text Size, Text Color, Text Background Color, Text Color, Text Background Color.

Announcements

When a System Administrator needs to contact every user in the system, they can post an announcement which appears in green text in the top portion of every user’s home screen when they log into iRIS (see screenshot below). You can click on the message to view the new announcement. Once you have viewed the announcement, the notice will disappear from your home screen.

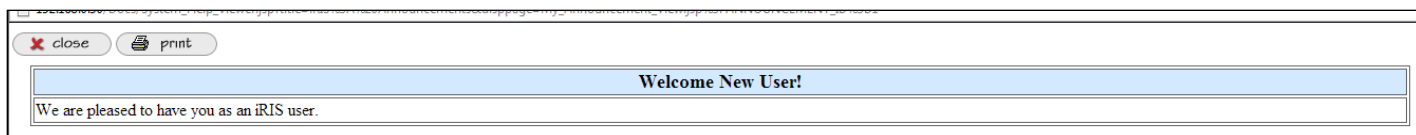


Clicking the link brings you to the System User Announcement screen where you can view the announcement.



You can view all of the current system announcements by clicking on the Announcements tab under My Assistant. System announcements can be viewed by clicking on the Announcements tab under My Assistant.

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.



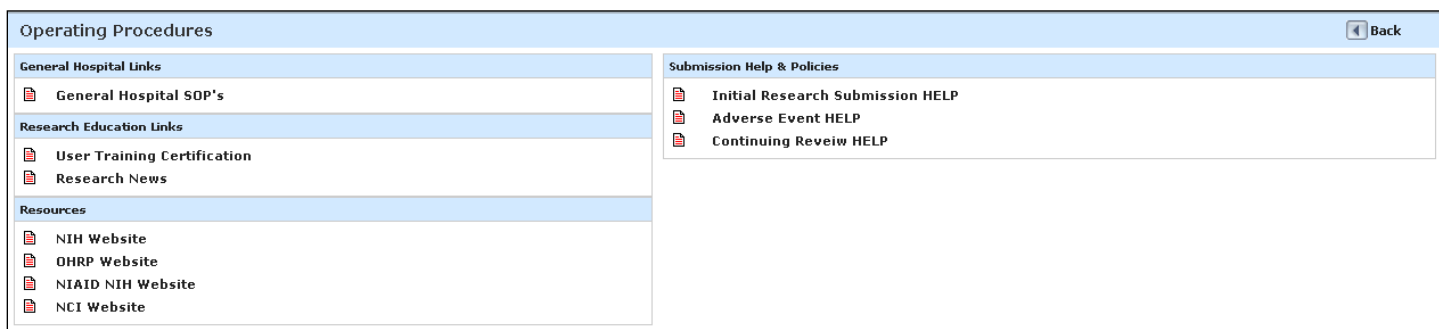
Operating Procedures

This section is used for your site’s Standard Operating Procedures (SOP’s). 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.

View Correspondence ◀ Back

Search Correspondence by Keyword :

 New Correspondence
 Previously Read Correspondence

1143 result(s) found... 1 - 20 ▶

Open	Study Number	Project Number	Task Details	Date Received
	Application for Research		Are you attending the upcoming IACUC meeting?	2016-10-28 13:08:43.397

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**.

You can toggle between New Correspondence and Previously Read Correspondence by selecting the corresponding radio button.

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.

View Correspondence ◀ Back

Posted: 10/28/2016 01:08 PM PDT *Send Email <input checked="" type="checkbox"/> *Subject Correspondence * Recipient(s): Susan Investigator Additional Recipients(s): Attachments No Attachments have been added to this message	*Content Sent From: Susan Investigator Send To: Susan Investigator Project Number: IRB-16-2869 Study Nickname: Application for Research Title: Copy of Application for Research Project Status: Pending - Submitted for Initial Review Principal Investigator : Susan Investigator Message Content: Correspondence
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All Department Reports

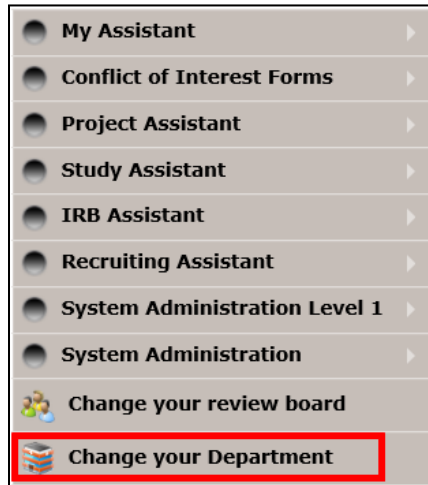
This section is for your site's All Department Reports. You will be able to run reports based off of numerous criteria, falling into categories including General, License, Studies by, Subject Tracking, Subject Tasks, Submission Tracking, and User's Schedule.

Above is a screen shot of what the all department reports may look like. To run a report, you should select the report you. We will run a Subject Visit Schedule report under the Accessible Depts header.

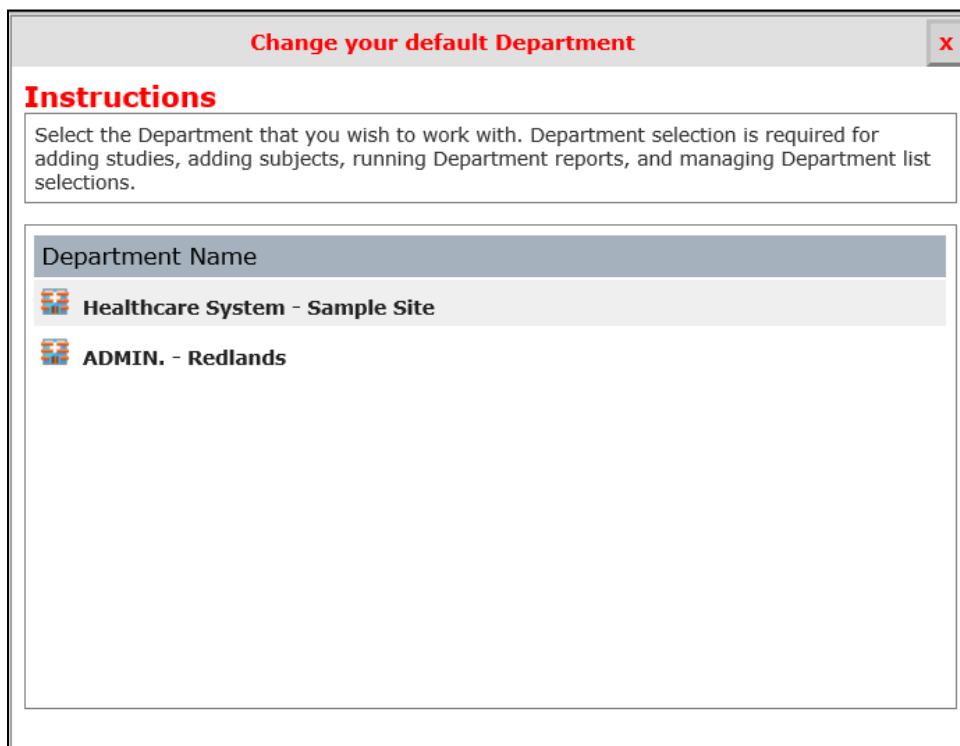
In the above screenshot, the user will be given the option to display the report as a PDF, HTML, or Excel file. The user will also be able to select date parameters. Lastly, in order to run a report in this section you must have at least one user selected. Click the search icon next to the Select User field to select specific iRIS users or all users. Next, click the **Run Report** button.

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**.



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. Select the report you wish to run. As an example, we will run a Review Boards History report under the Accessible Depts - General header. Click the Review Boards History

Link.

Accessible Depts - General <ul style="list-style-type: none">Review Boards HistorySubject Count by StudiesSubject Count by Studies - Following CRCSubject Count by Studies - SponsorSubject List for All StudiesSubject Visit Schedule	License <ul style="list-style-type: none">License Expiration
CRC - Subject Tracking <ul style="list-style-type: none">CRCs SubjectSubject Schedule	Patient Trials <ul style="list-style-type: none">Subject Clinical Trials
CRC - Tasks <ul style="list-style-type: none">CRCs Completed TasksCRCs Incompleted Tasks	Recruiting Filtered Trait <ul style="list-style-type: none">Patient Trait Accural
Credits <ul style="list-style-type: none">Credit by CRC	Screening <ul style="list-style-type: none">All ScreeningsScreenings by CRCScreenings by ReasonScreenings by Study
Current Dept - General <ul style="list-style-type: none">Subject Count	Studies By <ul style="list-style-type: none">Studies by EnrollmentsStudies by Status
Enrollment Reports <ul style="list-style-type: none">Enrollments by All StudiesEnrollments by CRCEnrollments by Race	Study Procedures and Visits Count <ul style="list-style-type: none">Study Arm Procedures , Visits Count
	Subject Tracking <ul style="list-style-type: none">Study Visit WeeklySubject Count Summary

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 date parameters to run reports on only necessary data. Run the report by clicking the **Run Report** button.

Review Boards History Back

Description: This report shows RB info. of protocols to be expired by the input date

Display Report as: PDF HTML Excel

Please Enter Expiration Date