

# Ethical Review Manager (ERM)

## Applicant Manual



**Draft Version 1.3**

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# 1 Introduction

ERM is a flexible web-based management system for Ethical Review Boards. It improves the ethical review process, saving review boards time and effort by automating the application, review and feedback process. ERM went live in 2013 and has been used across the world to help facilitate the ethical review process.

If you are new to Ethical Review Manager then one of the things that you need to do is obtain your own ERM account.

Obtaining an ERM applicant account is a simple process: you will need a valid email address and access to the website, where you can sign-up from login.

You should always use your own account to access ERM.

## 2 Log in/Sign up

### 2.1 Signing up

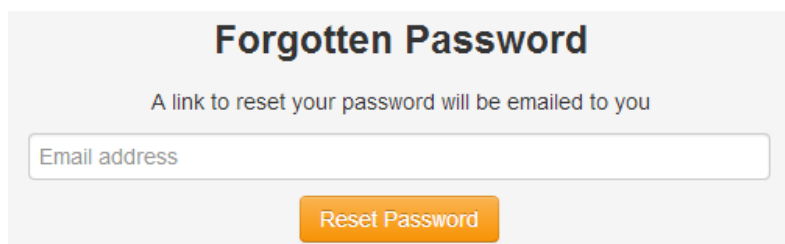
1. Navigate to the Ethical Review Manager site
2. Click on [New User](#).
3. Fill in relevant information, and agree to Terms and Conditions.
4. Click [Register](#), an activation email will be sent to the entered address.
5. Access emails and click the activation link provided, the account will now be activate.

### 2.2 Forgotten Password

1. When logging in as an applicant, if the password entered is incorrect an error message will appear.
2. Click on [Forgotten Password](#).



3. Enter the email address of the account you wish to be signed into.

A form titled 'Forgotten Password' in bold black text. Below the title, it says 'A link to reset your password will be emailed to you'. There is a text input field with the placeholder 'Email address'. Below the input field is an orange button with white text 'Reset Password'.

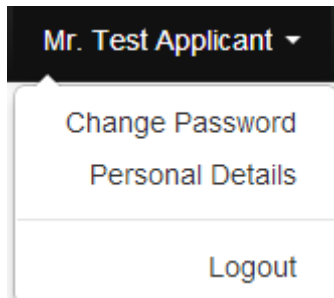
4. Click [Return to Login](#).
5. You will receive an email that contains a link that will allow you to change your password.
6. Enter your new password in the box provided and confirm it in the other, both passwords should match.
7. Click [Reset Password](#).
8. You will then be shown a message confirming the change of your password.

Your password has successfully been reset, please click [here](#) to return to login page.

## 3 Personal Details

### 3.1 Changing Personal Details

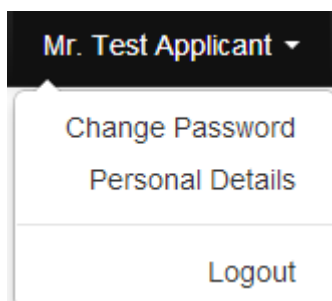
1. Signed in as an applicant, click on name located on top-right of browser.
2. Click [Personal Details](#).



3. Alter details requiring changes.
4. Click [Change Details](#).

### 3.2 Changing Password

1. Signed in as an applicant, click on name located on top-right of browser.
2. Click [Change Password](#).



3. Enter old and new password
4. Click [Change Password](#).

## 4 Work Area

The work area will display both active and submitted projects, as well as folders created by the user. There are a number of actions that can be performed on this page that begin the application process.

### 4.1 Creating Folders

1. Signed in as an applicant, click on the [Create Folder](#) tile.
2. Name the folder.
3. Click [Create](#).

**Create Folder** ×

Folder Title(maximum 40 characters):\*

Create

Close

### 4.2 Deleting Folders

1. Signed in as an applicant, click on the [Delete Folder](#) tile.
2. Select folder you wish to delete from the dropdown menu.
3. Click [Delete](#).

**Delete Folder** ×

Please select the folder that you wish to delete:

Test ▼

Delete

Close

### 4.3 Creating Projects

1. Signed in as an applicant, click on the [Create Project](#) tile.
2. Name the Project and select a main form.
3. Click [Create](#).

**Create Project** ×

Project Short Title:

Main Form

Annual Renewal ▼

Create

Close

## 4.4 Deleting Projects

1. Signed in as an applicant, click on the [Delete Project](#) tile.
2. Select the project you wish to delete from the dropdown menu.
3. Click [Delete](#).

**Delete Project** ×

Please select project that you wish to delete:

Test ▼

Delete

Close

## 4.5 Duplicating Projects

1. Signed in as an applicant, click on the [Duplicate Project](#) tile.
2. Select the project you wish to duplicate from the dropdown menu.
3. Click [Duplicate](#).

**Duplicate Project** ×

Please select project that you wish to duplicate:

Test ▼

Duplicate

Close

## 4.6 Moving Projects

1. Signed in as an applicant, to move a project into a folder you simple need to drag drop it.
2. If project is already contained in a folder, click on the folder you wish to move project from.
3. Click the [Move Project](#) tile in the sidebar.
4. A box will appear asking you two choose the project you wish to move as well as the new location folder.

**Move Project** ×

Project:

Test ▼

Destination Folder:

Folder ▼

Move

Close



## 5 Projects

### 5.1 Adding a Form/Sub-form

1. Signed in as an applicant, click on a created project in Work Area.
2. Depending on what type of form you wish to add click the [Create form](#) or [Create Sub Form](#) tile.
3. Select the form you wish to add from the dropdown menu.
4. Click [Add](#).

Add Form

Please select the form type that you wish to add against this project:

Annual Renewal

AddClose

Add Sub-form

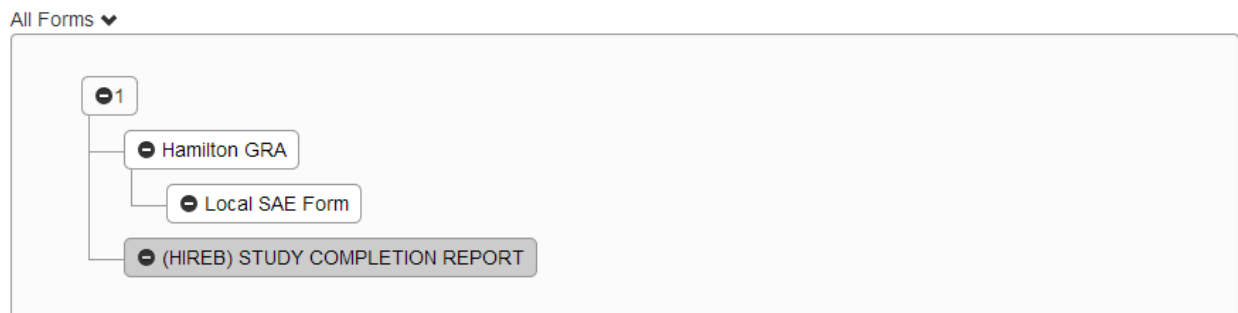
Select the sub-form that you would like to apply to this form

Review of Research Approved at SJHH or HHS/FHS

AddClose

#### **Navigation Branch:**

The new forms will appear in a navigation interface at the top of the screen. A form will be part of the main branch, where as a sub-form will attach it-self to the main form it is part of.



### 5.2 Viewing Submission history

1. Signed in as an applicant, click on the created project in Work Area.
2. Select the form you wish to view the history of from navigation shown in 5.1.
3. Click the [Submissions](#) tile in the sidebar.
4. A new page will appear displaying submissions history; the form can also be downloaded by clicking [Download](#).

## Submissions - (HIREB) STUDY COMPLETION REPORT

Review Reference	Date	Status	Committee	Pdf
PR/1/1	19/06/2014	Submitted by Applicant	Unallocated	Download

## 6 Notifications

### 6.1 Viewing Notification

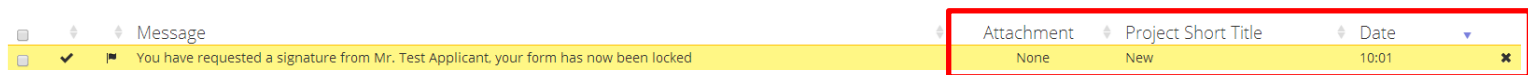
There are two ways to view notifications:

1. One way is by clicking the [Notifications](#) tile located in the Work Area.
2. The other is by clicking the [Notifications](#) tile located in the sidebar.
3. The notification can be viewed by clicking the message writing, where a box will then display it.







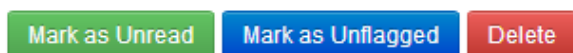
### 6.2 Viewing Project Attached to Notification

1. Signed in as an applicant, click on the [Notifications](#) tile.
2. While clicking the message writing will display the message in a box, clicking anywhere to the left of the message column will open the project that is attached the notification.



### 6.3 Altering Notifications

1. Signed in as an applicant, click on the [Notifications](#) tile.
2. A notification can delete a notification by clicking on the  symbol.
3. A notification can be flagged by clicking on the  symbol.
4. A notification can be marked as read by clicking on the  symbol.
5. Alternatively multiple notifications can be selected by clicking the  symbol, followed by the clicking the desired function button:



## 7 Signatures

### 7.1 Signing someone else's form

1. Signed in as an applicant, click on the [Signatures](#) tile in the work area.
2. Click on [View Form](#).

Type	Project Title	Requesting User	Message	Requested Date	Response Date	Status	Action
Other	Test	Mr. Test Applicant		19/06/2014 14:32	-	Requested	<button>View Form</button>

3. Click the [Sign](#) or [Reject](#) tile on the side bar.
4. Fill in the username and password and click [Sign](#).
5. If rejecting a Reason as well as your username and password is required.

#### Reject Signature

Please enter your login details in order to reject this form:

Reason:

RejectClose

### 7.2 Viewing Signature History

1. Signed in as an applicant, click on the project you wish to see signature history for in Work Area.
2. Click the Signatures tile on the side bar of the form page.

#### Signature List

##### Signatures

Type	Signatory Email	Signed Date	Validity
Other	applicant@infonetica.net	19/06/2014 14:40:50	Valid

##### Signature Requests

Type	Signatory Email	Requested Date	Status	Response Date	Action
Other	applicant@infonetica.net	19/06/2014 14:32:51	Signed	19/06/2014 14:40:50	<button>Cancel</button>

Close

## 8 Transfers

### 8.1 Transferring a project

1. Signed in as an applicant, click on the [Transfer](#) tile on the side bar of the Work Area.
2. Enter the email address of the person you wish to transfer to.
3. Select the project(s) you wish to transfer.
4. Click [Transfer](#).

### Transfer Projects

×

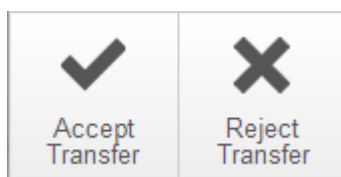
	User Project Id	Project Title
<input checked="" type="checkbox"/>	0011	New
<input checked="" type="checkbox"/>	0010	Test

### 8.2 Receiving Transfers

1. Signed in as an applicant, click on the [Transfer](#) tile on the Work Area.
2. Click on [View Project](#).

Transfer Id	Project Title	From User	To User	Message	Requested Date	Response Date	Status	Action
2	Test	Mr. Test Applicant	You		19/06/2014 15:29	N/A	Requested	<a href="#">View Project</a>

3. On the side bar click the desired tile, [Accept Transfer](#) or [Reject Transfer](#).
4. A notification will be sent to the other user to inform them of the action.



## 9 Sharing

### 9.1 Sharing a Form

1. Signed in as an applicant, click on the project containing the form you wish to share from the Work Area.
2. Click [Share](#) on the sidebar.
3. Enter the email Address; select the collaborators access\* and whether notifications are turned on.
4. Click [Share](#).

Share ?

×

Sharing a form enables others to view/edit the same form depending on the level of access you give them. Please select the users you wish to share this form with:

Collaborator email

Please Select... ▼

Please Select.. ▼

+

Share

Close

#### ***\*Collaborator Access:***

- Read Only: only allows the collaborator to read the form.
- Read and Write: allows the collaborator to make changes to the form but is limited to that.
- Full Access: allows the collaborator to make changes to the form, as well as the privileges to submit it for review.

### 9.2 Managing a Share Request

1. Signed in as an applicant, click on the [Shared](#) tile in the Work Area.
2. The form can be viewed by clicking [View Form](#) and rejected by clicking the [Reject](#) button.

## Shared Forms

Project Title	Requesting User	Requested Date	Status	View Form	Reject
Test	Mr. Test Applicant	19/06/2014 16:00	Granted	<div>View Form</div>	<div>Reject</div>

3. If rejecting a reason is required, enter a comment and click [Reject](#).

Reject Share Request

×

Please enter a reason for rejecting the share request: (optional)

Reject

Close

## 9.3 Viewing Collaborators

1. Signed in as an applicant, click on the project you wish to view collaborators from.
2. Click [Collaborators](#) on the sidebar.
3. A box will appear displaying the current collaborators.

Collaborators ×

---

A list of the current collaborators for this form:

**Note:** This form has not yet been shared with anyone

Close

## 9.4 Removing Collaborators Access

1. Signed in as an applicant, click on the project you wish to remove collaborator access from.
2. Click [Collaborators](#) on the sidebar, a box will appear displaying the current collaborators.
3. Click [Revoke](#) on the collaborator you wish to remove access for.

Collaborators ×

---

A list of the current collaborators for this form:

Name	Access	Notifications	Status	Requested Date	Revoke
Mr. Test Applicant	Read/Write	With Notifications	Granted	19/06/2014 16:00	Revoke

Close

## 10 Forms

### 10.1 Viewing Documents

1. Signed in as an applicant, click on the project containing the form you wish to share from the Work Area.
2. Click [Documents](#) on the sidebar.
3. A box will appear containing all the documents that have been uploaded to the form.

Documents

Search Document

Type	File Name	Date	Version	Size	View
Sponsor Letter	Desert.jpg	19/06/2014	1	826.1 KB	<div>Download</div>

Download All

Close

### 10.2 Submitting a Form

1. Signed in as an applicant, click on the folder/project containing the form you wish to submit.
2. Click the [Submit](#) tile from the sidebar.
3. If the form is incomplete the box that appears will show the questions that are still required to be completed.

Submit

Incomplete: Please complete the following questions:

- [Project title.](#)
- [Please read and sign this declaration:](#)

Close

4. If complete, the box will display:

**Complete:** Your form is complete and ready to submit

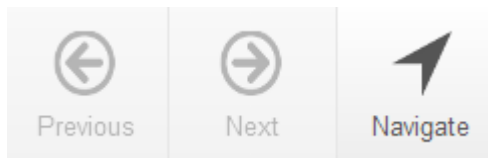
5. Click [Submit](#).

## 10.3 Shared Questions

Signed in as an applicant, while completing a form you may encounter a locked question or a question that already contains an answer, this is because the question is shared with another form which has been already been completed or is locked. On the instance that it is unlocked you will be informed that any changes made to this question will affect the corresponding form.

## 10.4 Navigating Forms

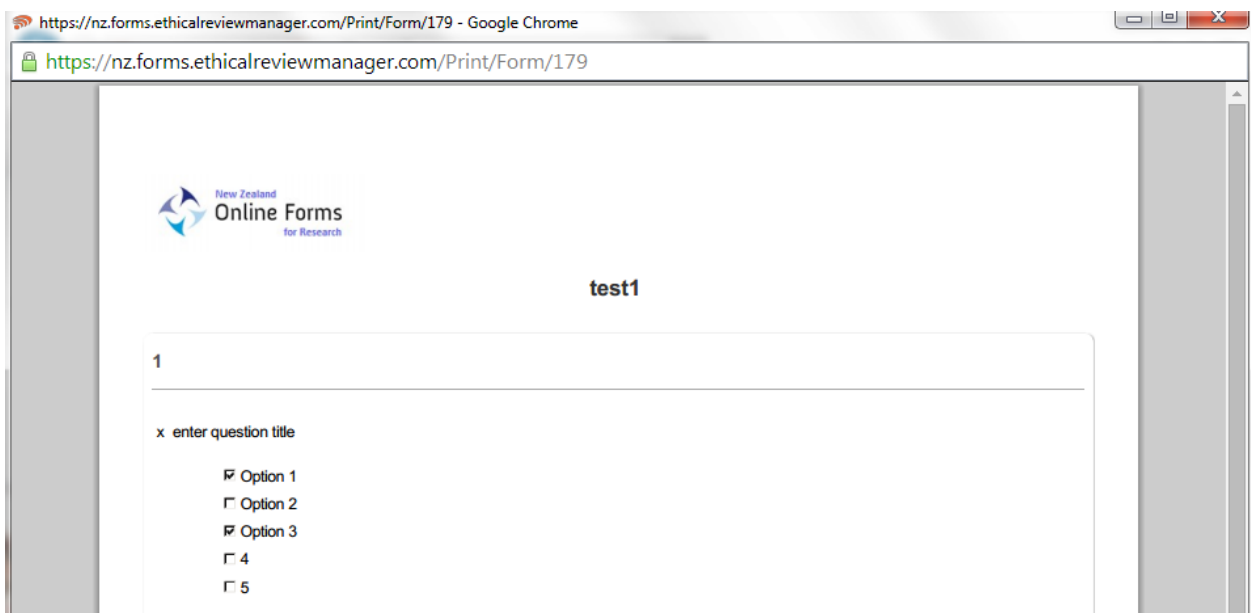
1. Signed in as an applicant, click on the project that contains the form you would like to navigate through.
2. Click on the form you would like to navigate through.
3. Once inside the form three tiles can be clicked to go through, Previous, Next and Navigate.



4. Previous and Next will locate you onto the last or next page.
5. Navigate will send you back to the project page showing links to each page contained within the form, click on the page desired to be located there.

## 10.5 Printing Forms

1. Signed in as an applicant, click on the project containing the form you wish to share from the Work Area.
2. Click [Print](#) on the sidebar.
3. A new window will appear with a preview of the form, click the Print symbol:





## 10.6 Updating forms

1. You may be required to perform an update on a form prior to submission.
2. Signed in as an applicant, click on the folder/project containing the form you wish to update.
3. Click on the form you wish to update.
4. If a newer version of the form is available for update you will be prompted to do so.

**Note:** There is a newer version of the project. [Update](#)

### Update Project



**Note:** This will update all the forms within this project.

#### Update Description

Question 1 has been updated

Update

Close

5. Click [Update](#).
6. The [Update Description](#) box will display any changes made to the form.

## 10.7 Unlocking a Form

When all signatures on the form have been signed, the form will lock. In order to unlock this form follow there instructions:

- Signed in as an applicant, click on the folder/project containing the form you wish to unlock.
- Click on the form you would like to unlock.
- Click the [Unlock](#) tile.
- Click [Unlock Form](#).
- The form will now be unlocked, you are required to re-enter the signature to lock the form again.