



# **REGIS - Internal Portal**

DRAFT v1.1





REGIS - Internal Portal v1\_1

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SHPN (OHMR) 180096 ISBN 978-1-76000-817-8

Acknowledgement

NSW Health would like to acknowledge F1 Solutions Pty Ltd, as the solution developer of REGIS, for the original content in this document. It has been published by NSW Health with the express permission of F1 Solutions Pty Ltd.

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February 2018

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## 1 Functionality and Access Rights

The Internal Portal is part of REGIS comprising:

- Internal Portal (for system and project management);
- **External Portal** (for online form submission, project portal and milestone submission and profile management); and
- Contact Relationship Management (for contact management).

The roles allocated to your user account determine which products you can access and which options within each product are accessible. For example, you may have access to Internal Portal and Contact Relationship Management or only to Contact Relationship Management.

Your accessibility to the functionality is bounded by the access rights set to your user account and your role in carrying out your daily tasks. If there are certain screens/functionality which you failed to access, please contact the REGIS System Administrator team.

End of section Functionality and Access Rights

## 2 General Data Entry and Navigation functionality

1. In general, the following are the functionality available in Personal Profile settings:

B Save B	Click <i>Save</i> upon completing the fields in each screen/page.
<b>D</b> Reset	Click <i>Reset</i> to clear values in all fields on a page.
C C	Click <i>Edit</i> allows the selected record available for changes.
<u> </u>	Click <i>Delete</i> allows removal of the selected record. CAUTION: This action is <u>not reversible</u> .
Show 10 $\checkmark$ entries	This allows for setting of the number of saved records to display on one page.
Search:	Typing a phrase/word on the <i>Search</i> box allows for quick search on the saved records.
<pre> 4 Previous 1 Next &gt; </pre>	If the number of records are not able to display on one page, the rest of the records are viewable by navigating the page numbers, or by clicking on <i>Previous</i> and <i>Next</i> .

NOTE:

a. The system prompts if there are unsaved changes detected when you navigate to another page/screen.

Stay on this page

Figure 2.1: The system prompt when unsaved changes detected.

- b. Clicking Leave this Page will discard any changes and navigate to another page/screen.
- c. Clicking *Stay on this page* allows user(s) to check keyed in values on screen and saving the updated data upon clicking *Save*.

End of section General Data Entry and Navigation functionality

## 3 Register New User

You can register by providing your email, first name, last name and password. External Portal will send a verification email to your email address. On receipt of the email, click the link to activate your account and gain access to the system.

This email is sometimes blocked by spam filters. If you do not receive the email within a few moments, look in your Junk E-mail folder. For any further support, check with your corporate IT support or contact F1 Solutions user support.

To register:

1. Click Sign up now on the login screen.

+D Sign In
PROFESSION IN THE REPORT OF
Can't access your accoun Reset your passwor

Figure 3 1: The Sign up now link on the Sign In screen.

- 2. Fill up the mandatory fields (\*) on the Register screen and perform the Captcha verification.
- 3. Click Register upon completion.

josh.yip@f1solutions.com.au	~
Please note that your <u>email address</u> will be used for your <u>userna</u>	ime.
Josh	~
Yip	~
********	and contain at least four of
The password must be a minimum of eight characters in length a	
the password must be a minimum of eight characters in length a he following four types of characters: Uppercase. Lowercase, N	

Figure 3 2: The Register screen.

4. Upon successful registration, the following screen will be shown and email is sent to the registered email address.

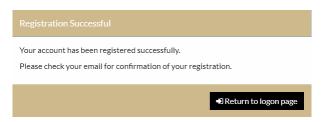


Figure 3 3: Account successful registered.

5. Click on the link in the email to activate registered account.

🖬 5 0 🛧 4	21				
File Message Q	Tell me what you want to do				
i gnore X □ ↓ Junk - Delete Archive	Reply Reply Forward	tts_olerts Tearn Email Reply & Delete	C To Manager Done Create New	- Mo	Rules *
Delete	Respond	Qui	ck Steps	5	Move
te OJoeh YIp Hi Josh,	gistration ng for REGIS. Your account has be	an constant and usu		a vie@ffcoli	
	to be activated before you can log	1979 - 1979 -	r username is, <u>juse</u>	Lyipierisoid	uons.com.au.
Click here to activate y	our account.				
If the above link does r	not appear, you can copy and paste	e the following link i	nto your web brow	wser's addre	ss bar: <u>https://re</u>
Regards.					
The REGIS team					
F	igure 3 4: Click on link	in email to ad	ctivate accou	ınt.	

6. The Account Activation screen opens automatically in a browser as follows:

Account activation	
Your account has successfully been activated.	
	✓ Sign In
Figure 3 5: Successful account activation.	

7. Click Sign In to sign in to the system from the Sign In screen.

Username	
Password	
	+D Sign In
	Can't access your account: Reset your password
	Don't have an Research Ethics Governance Information System account: Sign up now

Figure 3 6: Sign in to REGIS using your Username and Password.

8. Upon first time sign in, the system prompts for a password change.

Current password	
*******	~
New password	
new passworu	
The password must be a minimum of eight characters in len of the following four types of characters; Uppercase, Lower	
The password must be a minimum of eight characters in len of the following four types of characters; Uppercase, Lower Alphanumeric;	
The password must be a minimum of eight characters in len	

Figure 3 7: Changing password upon first time sign in.

9. You will be able to access the system upon successful password change by clicking Home.

Change password	×
✓ Your password has been changed successfully	
	✔ Ok
Figure 3 8: Successful password change.	

End of section Register New User

## 4 Login to External Portal

Once you are registered and your account is activated, you can login to External Portal:

1. Key in the *Username* and *Password* into the designated boxes on the sign in screen and press *Enter* or click *Sign In.* 

josh.yip@f1sol	utions.com.au
	+D Sign In
	Can't access your account Reset your password
	Don't have an Research Ethics Governance Information System account

Figure 4 1: The REGIS sign in screen upon keying in Username and Password.

2. Upon successful sign in to REGIS, you will need to agree with the *License Agreement* by clicking *Sign In* to proceed.

Licence Agreement
This is a restricted system. Use of this system is monitored at all times and requires explicit permission from the system administrator. If you do not have this permission, you are violating the regulations of this system and can and will be prosecuted to the full extent of the law. By continuing into this system, you are acknowledging that you are aware of and agree to these terms.
« Decline

Figure 4 2: The License Agreement screen after successful sign in with Username and Password.

- 3. Clicking *Decline* will bring you back to the *Sign In* screen.
- 4. If the Sign In failed due to problems with the *Username* and *Password*, the following message(s) will show on screen.

	iccessful. Please correct the error(s) and try again.
	me or password provided is incorrect, the user account is locked, or not been granted any roles.
Mp	
	€D Sign In
	Can't access your account Reset your passworr

Figure 4 3: The messages shown on screen upon failure to sign in.

IMP	ORTANT
1	You will not be able to proceed with any system usage until you are successfully signed into the system.
2	The first page you see upon successful sign in to the system may be different from other users' due to your role and the access to functionality in the system.
3	One (1) computer allows for one user account sign in at any one time. For e.g., if you are signed in as UserA, please <u>DO NOT</u> use another browser or opening a new browser tab to sign in as a different user.

Table 4 1: REGIS Sign In – Important points to note.

#### 4.1 Forgot Password

If you have forgotten your password you can follow the steps below to reset your password. An email will be sent to you containing a link to re-verify your login

1. Click *Reset your password* on the *Sign In* screen.

ign In	
Username	
Password	
	+D Sign In
	Can <sup>t</sup> tacress your account Reset your password

Figure 4 4: The Reset your password link on Sign In screen.

2. The Reset Password screen prompts for your User Name.

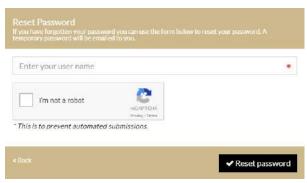


Figure 4 5: The Reset Password screen.

3. You will need to perform the *Captcha* verification before clicking *Reset Password*.

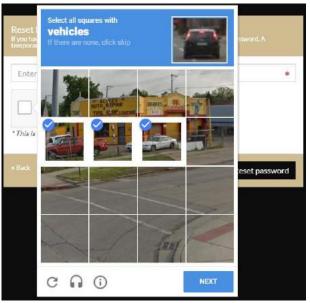


Figure 4 6: Perform the Captcha verification.

4. Upon *Captcha* verification, and clicking Reset password, an email will be sent to the user's registered email address for the next action to proceed.

josh.yip@f1solutions.com.au	~
Vîm not a robot	
This is to prevent automated submissions.	

End of section Login to External Portal

## 5 Navigation in REGIS External Portal

1. You can navigate directly to a system module, e.g. Projects, by selecting a tile on the *Start* page.

IMP	ORTANT
1	Only modules that are relevant to your role are displayed. For example, unless you have a Project related role, you will not see the Projects icon.
2	The first page you see upon successful sign in to the system may be different from other users' due to your role and the access to functionality in the system.
3	One (1) computer allows for one user account sign in at any one time. For e.g., if you are signed in as UserA, please <u>DO NOT</u> use another browser or opening a new browser tab to sign in as a different user.



Table 5 1: REGIS Sign In – Important points to note.

Figure 5 1: Keying in the user name and successful Captcha verification.

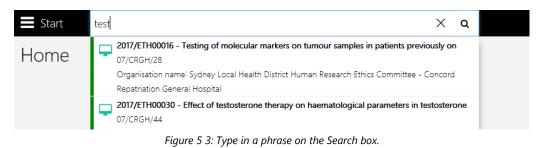
2. From anywhere in the system, you can navigate to the Start page by selecting the Start in the top left hand corner of the screen.



Figure 5 2: Click Start to navigate to other functionality of the system.

#### 5.1 Search

At the *Search* text box, you can search for related Projects by typing in the phrases of the project name.



#### 5.2 Tasks

Outstanding *Tasks* are shown when you click on Tasks from the Start menu.

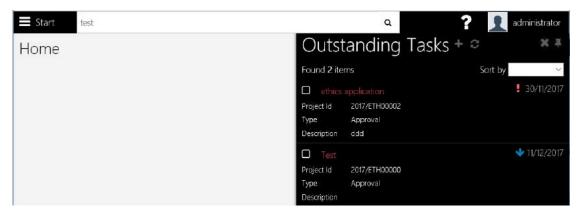


Figure 5 4: The outstanding tasks and its priority.

1. Selecting the task(s) by checking the box(es) changes the task(s) from active to complete.

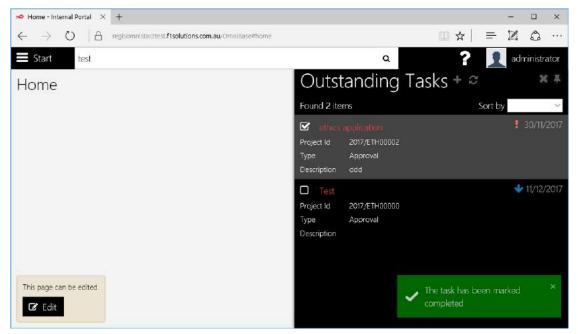


Figure 5 5: The task is marked as completed.

### 5.3 Help

≡ Start test Q ? 👤 administrator Help 🖻 🛍 × 1 Home Home The interactive Calendar summarises due dates for project milestones, tasks, issues and risks allocated to you. You can Customise the calendar display by selecting and deselecting the Select the toggle butten to display milestones, risks and issues for the all projects, or just the projects that you are linked to via a contact role. *Refer to the hep on the Projects Contacts page for more information on linking contacts.* Select the month, week or day views and navigate using the right and left arrows Select the Today button to navigate to the current date Click the Milestone to navigate to the milestone screen in the project viewer Click the Risk or Issue to navigate to the risk/issue management screen in the project viewe Click the Task to navigate to the task screen in the project viewer

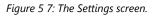
Provides REGIS Internal Portal information available on the right side of the page.

Figure 5 6: The help information on screen.

#### 5.4 Settings

- 1. Click on Settings.
- 2. The following *Settings* screens allows for changes, as follows:

■ Start test		٩	? 👤 administrator
Settings	Settings		
Settings	Dashboard Theme	Dark	*
	Default Landing Page	Home	
Change Password		🖹 Save	
Email Footer			
Social Logins			



Menu	Fields	Remarks		
	Dashboard Theme	The colour of <i>Dashboard</i> , whether <i>Light</i> or <i>Dark</i> .		
Settings	Default Landing Page	This is the Home page. Selectable options include <i>Applications</i> , <i>Dashboard</i> , <i>Home</i> , and <i>Projects</i> . NOTE: Please sign out and sign in again to see the changes.		
Change	Current Password	Type in the current password		
Password	New Password	Type in the new password. Please follow the password rule on screen.		

Menu	Fields	Remarks
	Confirm New Password	Re-type in the new password.
Email Footer	Email footer box	Type in the required email footer text message. The text format menu bar allows for text formatting, if required.

Table 5 2: The available Settings functionality.

IM	IMPORTANT							
1	The Settings screen is accessible base on the user's access rights. Ensure the necessary access rights are assigned to the respective users.							
	Table 5 3: REGIS Internal Portal Settings – Important points to note.							

End of section Navigation in REGIS External Portal

## 6 Home/Calendar

The interactive Calendar summarises due dates for project milestones, issues and risks and tasks allocated to you.

IMPORTANT						
1	You will need to have access to view Projects to view the interactive calendar. Ensure the					
	necessary access rights are assigned to the respective users.					



<b>Start</b> Search				٩	?	1 administrator
Calendar			Meeting	Milestone 🔴 T	ask 🔴 Issue 🔵	Risk 🔵 Review
▼ Filters Show only my events		Yes				
K > today		Dec	ember 201	7	ma	nth week day
Sun						
26					n	2
3	4 12a i	5 xpert Review - Tes	6		8 12a Padmaja 1 3p Hrec Review	9
10	11		13 a ETH0990 Review Te a test review	2a 2017/DB 001511 - QdF	15 12a HREC December 12a test review - basic	16 <b>2a</b> Ext Rev for uat2
17	18	19 12	20 a External Expert Revi	21	22	23
24	25	26 12	27 a padma 1212	28	29	30 2a test 1
31 <b>12a</b> Def <b>36</b> +3 more						

Figure 6 1: The Calendar screen.

The available Calendar functionality allow users to:

1. Customise the calendar display by selecting and deselecting the *Meeting, Milestone, Task, Issue, Risk* and *Review* buttons. Deselecting display is shown as grey indicators.

Calendar - Internal							- • ×
O	A regard	instanual fisolution	s.com.au/OmniBase#cale	oder .		□ ☆   =	Z Q
Start	earch			16 <u>14</u>	٩	? 🔰	administrator
Calenda	r			Meeting	Milestone Tas	k Issue R	isk 👘 Review
<b>T</b> Filters how only my ev	ents		Yes	57 <b>-</b>			
< > 1	oday		Dec	ember 2017		mon	th week day
						1	
	3	4	5	6	7	8	
	10	11	12	13	14	-15	1
		.0.	12	. 13	14	6	
	17	18	19	20	21	22	2
	24	25	26	27	28	29	3
	31						

Figure 6 2: The Calendar screen without any events displayed.

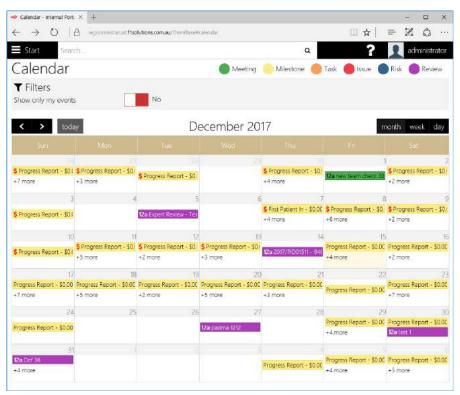


Figure 6 3: The Calendar screen displaying all events.

2. The calendar displays include the following:

Indicator	Remarks					
Meetings	Clicking the Meeting item(s) will go to the <i>Meeting Details</i> page.					
Milestone	Clicking the Milestone item(s) will go to the <i>Project Milestone</i> page.					
Task	Clicking the Task item(s) will go to the <i>Project Tasks</i> page.					
Issue/Risk	Clicking the Issue/Risk item(s) will go to the <i>Project Issues</i> page.					
Review Clicking the Review item(s) will go to the <i>Application Review</i> page.						
	Table 6 2: REGIS Internal Portal Calendar notification items are clickable.					

3. Select the month, week or day views and navigate using the right and left arrows.

< > today	Decemb	er 2017	month	week day

Figure 6 4: The navigation for the Calendar screen.

- 4. Select the *Today* button to navigate to the current date
- 5. You may notice that some milestone icons have a document icon attached. This indicates that a milestone report has been uploaded in the Project Portal



*Figure 6 5: The indicator of upload document in Calendar screen.* 

End of section Home/Calendar

## 7 Time-out prompt

If you leave your session for a period of time, the system will prompt you to either end or extend the session.

- 1. Select Yes to extend the expiry point for the session
- 2. Select No to log out of REGIS Internal Portal and REGIS Contact Relationship Management

Start						Q	- ? <	1	
Available filters - 1		Project	s 🚍						^
Status	= 0	T Filters							
Program	= 0						All		
Year from									
Reporting Group	= <b>0</b>	Selected filte							
You	ur current sessio	is about to on is about to end will be lost. Woul	d in less than 60	seconds. You will be ep working?	logged out a	and			
				Yes	No				
Projects without the classificati selected	on = O		assessment						
Organisation	= 0		Eligible - awaiting assessment	2015/TEST4354 UT	103	test			
		D	Eligible - awaiting	2015/TEST4352 UT		test ap			
	3	Session wil		20 seconds					

Figure 7 1: The time-out warning screen.

End of section Time-out prompt

## 8 Contacts

The *Contacts* functionality links to REGIS Contact Relationship Management. Therefore, to get full usage of the functionality, you will need access rights to REGIS Contact Relationship Management.

To access Contacts functionality:

1. Click on Start to view the main menu and click on Contacts.



Figure 8.1: The Contacts option in main menu.

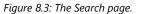
2. The functionality of the *Contacts* page are as follow:

E Start Search	٩		? 🤦 administrato
Q Search	New contact	Merge contact	Bulk update
Contact address coordinates	Unlock contacts	Contac	e groups
Favourites (0)	Recent Contacts Figure 8.2: The Contacts page.		

#### 8.1 Search

1. Clicking on the *Search* icon navigates to the Search page.

Start Search.			Q	? 👤 josh.yip@f1solutions.com.au
		Contacts ≡		
Contact Group	0	▼ Filters		
Contacts with the classification selected	0	Search		Al *
Contacts without the classification <sub>s</sub> selected	0	Role	Organisation Q. Find 🗶 Clear	
Include contacts with no	0	Found 0 Contacts		
Include inactive contacts	0			
Tags	0	1		



2. There are existing search filters on the left of the screen to ease the usage of the search function. Click on the required available filter(s) and it will be plotted to the right of the page.

Start Search				۹	? 🧕 josh yip@Asolutions.com.au
Available filters - 4			Contacts ≡		
Contact Group	8	0	▼ Filters		0 0
Contacts with the classification selected	н	0	Search		All •
Include inactive contacts	œ	0	Role	Organisation	
Tags	. 2	0		Q Find X Clear	
			Selected filters - 2 Include contacts with no classification Contacts without the classification	n Yes Select Some Options	×
			selected Found 0 Contacts		

Figure 8.4: The Contact's search criteria.

- 3. Select/key in the specific value(s) of the search criteria fields and click *Find*.
- 4. The search result(s) will be shown on screen below the search criteria.

Start Search				٩		? 🤦 josh	.yip@f1solutions.com.au
Available filters - 4		Contac	ts ≡				
Contact Group	= O	▼ Filters					00
Contacts with the classification selected	- 0	Search					Al •
	e 0	Rale		Organisation			*
	1226			Q Find X C	lear		
Tags	= 0	Selected filt	ers - 2				
		0.0739070.361.2	cts with no classification	Yes			×
		Contacts with selected	out the classification	Researcher - Yes	×		- x
				shee			1941 - 1945 1942 - 1944
		0 Contact(s) se	elected / Found 31 Cont	acts			🕅 📖 🗞
		0	Organisation	ABN	ACN	Terga	
		ο	Aboriginal Health Medical Research Council Ethics Committee	<u>8</u> .			Ø
		o	ACT Health Huma Research Ethics Committee	n			C
		O	ACT Jurisdiction				Ø
		0	ACT Local Health District				Ø
			ACT test organisa	tion			Ce .
		O	ACT Test Site				Ø
		0	Balmain Hospital	4649270972	21		C
		D	Canterbury Hosp	tal 5169566369	19		ß
		0	F1 Solutions				8
		D	Greate/ Western Human Research Committee	Ethics			ß
		ltems per pag	e 10 •			« < 1 a	2 3 4 <b>&gt; »</b>

Figure 8.5: The Contact's search result.

5. The search results can be displayed as follows:



		D	Organisation ABN ACN Bags
	The results display in	o	Aboriginal Health & Medical Research Courcel Ethics Committee
<b>—</b>	table form and on the same page.	on the 🛛	ACT Health Human Research Ethics Committee
	same page.	O	ACT Jurisdiction
		0	ACT Jurisdiction 22 ACT Local Health District 23
•	The results are marked on a map based on the contacts' address(es).	Mao Satelles Indian Ocean	0 Indonesia Next Same Buchas Same Deglas New Cance No Cance Cance Cance Consiste Consi

Table 8.1: The Contact's different displays for search result(s).

6. When the search results are in table form, clicking *Edit (C)* ) of the contact records allows for editing in REGIS Contact Relationship Management.

Search New	Contact admin	Gorriact groups	eNewsletter	Settingi	C Help
Quick Search				6	
	Aboriginal Her	alth & Medical I	Research Cou	uncil Ethics Com	mittee
	Organisation name			5x	
		Medical Research Coun	cil Ethics Committee	e	
	Legal name	Medical Research Coun	all Fability Commission	13	
Organisation details			chiefnies committee		
	Organisation type HREC	é			
	Acronym		Euto	rnal client code	
	Recongrat		ECOC		
	ACN	ABN		GICS nur	nber
	Website URL				
	Delivery Preference	e			
	(None)				

Figure 8.6: The Contact is editable in REGIS Contact Relationship Management.

#### 8.2 New contact

1. Clicking *New contact* navigates to the *New contact* screen.

Start Search		٩	?	josh.yip@f1solutions.com.au
1. New contact				×
New contact				
Contact Type	Choose			This field is required.
	Figure 8.7: T	he New Contact page.		

2. Select a *Contact type* from the drop down listing, click the blue arrow (>) to go to next page.

Start Search		٩	? 🧕 josh yip@fisolutions.com.au
1. New contact 2. Person details			×
New contact			
Contact Type	Person		*

Figure 8.8: The New Contact page – select Contact Type.

3. Fill up the details in the Person details page.

Start Search		Q	iosh.yip@f1solutions.com.au
1. New contact 2. Person det	ils 3. Confirmation		×
Person details			
Given name	Josh		
Middle names			
Family name	Yip		
	Vip Josh.yip@email.com		

*Figure 8.9: The New Contact page – filling in Person details.* 

4. Click the blue arrow (>) to go to the *Confirmation* page.

Start	iearch		۹	iosh.yip@ftsolutions.com.au
1. New contact	Z. Person details	3. Confirmation		×
Con	firmation			
	sible duplicates for ve checked that this i			
Na	me	Position	Email	
Mr	Josh Yip		josh.yip@gmail.com	
Iten	ns per page 10	•		

*Figure 8.10: The New Contact page – Confirmation of details.* 

- 5. At the Confirmation page, there is a field to confirm whether the contact is duplicate.
- 6. Click  $\checkmark$  to confirm creation of new contact.
- 7. Upon successful creation of a new contact, you will be redirected to REGIS Contact Relationship Management, the Contact Details page. You may proceed with filling up the rest of the necessary information, if required.

Guick Search			60	CARANC TAU
	Josh Yip			
*	Title	•		
	Honorific			
Personal details	Given name		1	
Address details	Josh			
	Middle names			
	Family name			
	Preferred name			
	Gender			
	Unspecified	Female	🖌 Ma	lii
	Birth date	Deceased date	Confidentiality agr date	eement signe
	dd/mm/yyyy	dd/mm/yyyy	dd/mm/yyyy	
	Residential Status Australian Citizen		0.004	
	ORCID ID			
	IMPORT VIEW			
	Disability			
	a man maile and a survey of			
	Aboriginal or Torres Strait	Islander		
	Staffink id			
	Statilitie in			

Figure 8.11: The contact details in REGIS Contact Relationship Management.

IMF	PORTANT
1	The Possible duplicates found option needs to be Yes to proceed with new contact
	creation.

Table 8.2: The Contact's different displays for search result(s).

#### 8.3 Merge Contact

1. Clicking Merge contact displays the Merge Contact screen.

Start Search		٩	? 🧕 josh.yip@ftsolutions.com.au
Merge Contact			
1. Contaits 2. Preview			×
Contacts			
Merge	Choose		

Figure 8.12: The Merge contact screen.

2. Select the *Contact type* from the drop down listing.

Start Search	Start Search		? 👤 jo	sh.yip@f1solutions.co	m.au
Merge Contact		Perso	on search		хį
1. Contacti 2. Preview		josh		Q	+
		Found 2 its	ems		
Contacts		Name Email	Yip. Jash jash yip@gmail.com		
Merge	Person	Phone	+61 4 32345678		
Target contact	Yip, Josh	Name Email	Yip, Josh josh.yip@email.com		
Source contact					

Figure 8.13: The Merge contact screen.

- 3. Select the *Target contact* and *Source contact* by clicking on .....
- 4. Click the blue arrow (>) to go to the *Preview* page.

∃ St.	art Search		۹	? 🧕 josh.yip@fisolutions.com.a
Mei	rge Contact			
T.Cor	rtacts Z. Prestess			3
	Preview			
		tact is below. Some records have been or rec arget contact already contains a record of not be menged.		Notes, however these will still be merged address, the record of the same type from
,	Mr Josh Yip (Target)		Yew Choh Yip (Source	
/	Details		Details	
/	Gender		Gender	Male
/	Birth date	1	Birth date	
/	Linked records		Linked records	×
/	ORCID Imported Date		ORCID Imported Date	
1	[Employments]	0	Email	josh yip@yahoo.com
	[Employments]	0	ORCID Id	1234-5678-9012-3456
	[Fundings]	0		
	[Fundings]	0		
	[Publications]	0		
	[Publications]	0		
	Address	88 Davenport Street Dickson ACT 2602 Australia		
	Address	99/12 Newcastle Street Pyshwick ACT 2619 Australia		
	Address	87 Clayton Drive Clayton VIC 8563 Australia		
	Address	PD2-1707, Maisson Residence, Ara Damansara Malaysia Malaysia		

Figure 8.14: The Merge contact preview screen.

IM	PORTANT
1	Inactive contacts cannot be set as Target contact or Source contact
2	The Target contact and Source contact cannot be locked.
3	The Target contact and Source contact must have same ORCID.
4	Source contact information will be merged to the Target contact. Should there be existing records of the Target contact, merging will not overwrite the Target contact's record of a specific Type.
5	The system deletes Source Contact upon successful merging.

Table 8.3: Merge Contacts – Important points to note.

#### 8.4 Bulk Update

1. Clicking *Bulk update* goes to the *Bulk Update* page of REGIS Contact Relationship Management in a new browser tab.

ē		Bulk up	date		
Select the record type to	o update, enter the text to fi	nd and enter the te	ext to text to repla	rce.	
Phone Number	o update, enter the text to fi		ext to text to repla	rcie.	
			ext to text to repla	rce.	
Phone Number			ext to text to repla	nce.	

*Figure 8.15: The Bulk Update screen in REGIS Contact Relationship Management.* 

- 2. The *Bulk Update* functionality allows for updates on the *Phone Number* and *Email Address* of more than one record.
- 3. Select Phone Number or Email Address.
- 4. Type in the Search text and Replace text as follows:

Quick Search	Contact admin Contect gro	nga eNewsletter	Settingt	B Heip Sign out
	Bull	k update		
Select the record type to upo	late, enter the text to find and enter	the text to text to repla	ce.	
Phone Number	Email Address			
Search text				
josh.yip				
josh.yip Replace text				

Figure 8.16: The Bulk Update screen with sample values.

Field	Remarks
Search text	This is the Phone Number/Email Address that you want to replace.
Replace text	This is the Phone Number/Email Address that you want to replace with.
!	Table 8.4: The Contact's different displays for search result(s).

The above example in the screen will replace all Email Addresses that has 'josh.yip' with 'joshyip'.

5. Clicking SEARCH will bring you to the results preview page.

Quick Search			an j
ē		Bulk update	2
Bulk update	search res	ults	
CONTACT	TYPE	OLD VALUE	NEW VALUE
CONTACT			
Josh Yip	Person	josh.yip@email.com	joshyip@email.com
Too sold in the second second		josh.yip@email.com josh.yip@f1solutions.com.au	joshyip@email.com joshyip@f1solutions.com.au
Josh Yip	Person	New York Contraction of the Contraction	
Josh Yip Mr Josh Yip	Person Person	josh.yip@f1solutions.com.au	joshyip@f1solutions.com.au

Figure 8.17: The Bulk Update screen with preview of new value(s).

6. Upon clicking UPDATE, the old values will be replaced with the new values.

#### 8.5 Contact Groups

1. Clicking Contact groups goes to the Maintain Groups page.

Start Soor	chi.,	٩	?	Josh.yip@f1solutions.com	n.au
Maintain C	Groups <b>≡</b>				
<b>▼</b> Filters					٩
Search					
	Q Search 🗶 Reset				
Found 2 Items					ß
Type		Description			
User	Chief Executive	Chief Executive		C	Û
Contact	Opt-In Notifications			ß	۵
Items per page 10	×				

Figure 8.18: The Maintain Groups screen.

#### 8.5.1 Search for existing groups

1. Key in the required Group name on the Search box and click Search. The search result(s) displays on the same page.

E Start	Search	۹ ؟	1 administr	ator
Mainta	in Groups =			
<b>▼</b> Filters				٥
Search	opt			
	Q Search 🗶 Reset			
Found 1 item				R
Contact	Opt-In Notifications		ß	Û

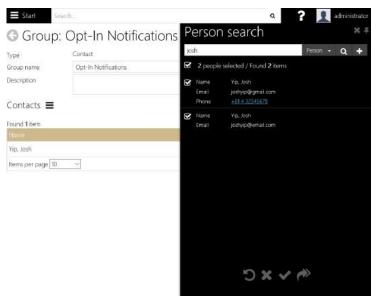
Figure 8.19: The search result.

- 2. Clicking Edit ( ) displays the related type (Application, Contact, Project, User) tied to the group.
- 3. Clicking Menu (=), then *Add Contacts*, allows to add the related type (Contact, User, ) to the required group.

Start	Search	۹ ?	administrator
G Group	o: Opt-In Notifications		
Туре	Contact		
Group name	Opt-In Notifications		
Description			B
Contacts 🔳	+ Add contact(s)		×
Found 1 item			x
Name			
Yip <sub>e</sub> Josh		Person	Ô
Items per page 1	) v		

Figure 8.20: Add the related type item to group.

- 4. Type in the required and press *Enter* or click **Q**.
- 5. Click/Tick the check box(es) to select items to add.
- 6. Click  $\blacksquare$  to add the selected records.



*Figure 8.21: Add the related type item to group.* 

7. The items/records added are in green:

Start	Search	۹ ?	1 administra
3 Group	p: Opt-In Notifications		
ype	Contact		
iroup name	Opt-In Notifications		
Description			4
Contacts 🔳			
			x
Contacts 🔳 ound 2 items Name		Туре	
ound 2 items		Type Person	

Figure 8.22: Add the related type item to group.

8. Click Save (E) to save the changes.

#### 8.5.2 Add new group

1. From the *Maintain Groups* screen, click on Menu (=), and select *Add group*.

Start	Search		۹ ?	👤 administr	ator
Mainta	in Groups 😑 🛨 🛤	d group			
<b>▼</b> Filters					٩
Search	opt				
	Q Search 🗶 Reset				
Found 1 item					Ŧ
				8	ŵ



- 2. The *New Group* page is displayed.
- 3. Fill in the following fields:

Field	Remarks
Туре	Select the Type of group. This defines the items to be available for tagging to the new group.
Group Name	Key in the required Group Name.
Description	Key in a description for the new group.

Table 8.5: The fields of a group.

<b>Start</b> Se	earch	۹	?	administrator
G New G	iroup			
Туре	Application			Ψ.
Group name	Application and submission team			
Description	Application and submission team			6
Applications	≡			×
Found <b>0</b> items				
Select "Add Applica	ations" from the drop-down menu to add applications to this group			

Figure 8.24: Click Add group.

- 4. Click on Menu (=), and select *Add application*. Please take note that the *Menu* is based on the selected *Type*. If it is of type *Application*, you will see the *Add application* option.
- 5. The available selection item to be added are Applications.

🗮 Start 🛛 Se	irch	Q ? 👤 administrator
G New G	roup	Search by application ***
Type Group name	Application application	Program Status Search Search
Description Applications Found 0 items Select "Add Applica	Add Applications	2 applications selected / Found 185 applications     Genter 2017/STE00001     Stage Ste     Tots Research into the project submission process
		Stage 2017/ETH00001 Stage Ethics Title Research Project 1 - HREA Tags
		derraher 2017/STE00002 Stage Site Tible Research Project 2 Tags
		Idensifier     2017/CTI-000002       Stage     Ethics       Tale     Research Project 2 - HRE A

Figure 8.25: Click Add applications.

- 6. Click  $\blacksquare$  to add the selected records.
- 7. Click Save () to save the changes.

# 8.6 Contact Address Coordinate

1. Clicking on *Contact address coordinates* opens a new browser tab that navigates to REGIS Contact Relationship Management's *Empty Coordinate Report*.

Seatch New	Contact admin	Contact groups	eNewsletter	Settings	CR Obern Using
Quick Search				00	The second
Empty Coordinate	s Report				
	contacts having at least one ad	tdress with no coo	ordinates recorde	d.	
				20) 	
ADVANCED					
ADVANCED	Organisation res			-	

	Aboriginal Health & Medical Research Council Ethics Committee
	ACT Health Human Research Ethics Committee
	Canterbury Hospital
	Greater Western Human Research Ethics Committee
10	Joint University of Wollongong and Illawarra Shoalhaven Local Health District Health and Medical Human Research Ethics Committee
	Nepean Blue Mountains Local Health District
	NSW Population and Health Service Research Ethics Committee
	South Eastern Sydney Local Health District HREC
	South Western Sydney Local Health District Human Research Ethics Committee
	Sydney Children's Hospitals Network Human Research Ethics Committee

Figure 8.26: The Empty Coordinates Report in REGIS Contact Relationship Management.

# 8.7 Unlock Contacts

## 1. <u>Clicking Unlock contacts navigates to the Unlock Contacts page.</u>

Start Search	٥	2	administrator
O Unlock contacts			
Found 13 contacts			30
Contact	Role 🛩	Locked by	
ACR-Home Health Dietitian-Camperdown (Unit)	Unit	administrator	-
Balmain Hospital Acupuncture Clinic (Unit)	Unit	EOHRECB@f1solutions.com.au	£
corrine4001 @gmail	Person	administrator	<b>£</b>
Kathryn Adams	Person	administrator	<b>e</b>
Greg Swanston	Person	EOHRECB@f1solutions.com.au	<b>_</b>
Dummy User	Person	administrator	<b>_</b>
Test User	Person	administrator	-
Test User2	Person	administrator	La construction de la constructi
Josh Yip	Person	administrator	<b>_</b>
Canterbury Hospital	Organisation	Kathryn.Adams@f1solutions.com.au	-

Figure 8.27: The locked contacts are displayed on the page.

2. The following are the functionality of the *Unlock contacts* page:

x	Exports the Unlock contacts list to a Comma-Separated Value (CSV) file.
С	Refresh the list of <i>Unlock contacts</i> .
₽	Unlock the affected contact(s).
	Table 8.6: The standard functionality.

End of section Contacts

# 9 Project Management Options

# 9.1 Simple Project Search

You can search for projects by Title, Keyword, Reference or Project Id using the basic search options.

1. Click Start and select Project.

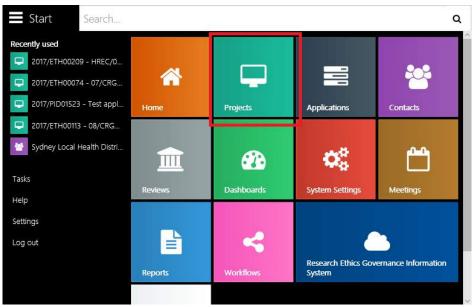


Figure 9 1: The Projects selection in the menu.

2. Click on the Projects tile. The Project home screen is displayed.

administrato
Unlock project
ts
c'

Figure 9 2: The Projects selection in the menu.

3. Click on the *Search* tile in Project home screen.

Start Search		٩	? 🧘 administrate
Q Search	Copy project	Change identifier	
avourites (0)		Recent Projects	

Figure 9 3: The project Search tile menu.

- 4. Enter required words or partial words to search.
- 5. The left side of the Project search screen is a list of filter criteria that can be used. Click on the area to include the required criteria.

Available filters - 12			<b>T</b> Filter:	5				0	۵
Group	.=	0	Search	cted filter	test			AI	•
Include deleted projects	12	0	Jere	$\mathbf{\hat{h}}$	<b>Q</b> Find	🗙 Clear			
Organisation		٥	Selected f	ilters - 1					
Coordinating Principal Investigator	=	0	Status 0 Proiect(s)	selected / Found <b>59</b>	Register	ed 🛛	* Vie	sw.	×
Program	=	0			Status	Application identifier	Title	Tags	
Project Owner	=	٥	o	2017/PID01549	Registered		PH - Test		
Projects with classification	1	٥	-				Security		
Projects with no classification	R	٥		2017/PID01543			test		
Projects without classification	=	0		2017/PID01533	Registered		Testing CRGH		
Region	1	0		2017/PID01526	Registered		Test Project 2 08122017		
Tags		0		2017/PID01524	Registered		⊺est project 08122017		
Year from		٢		2017/PID01523	Registered		Test application		

6. Click *Find* and the results will be display below the search criteria section.

Figure 9 4: The project Search page with selected criteria and results.

- 7. Click on a project in the list to open the project in *View* mode; or click *s* to open the project in *Edit* mode.
- 8. On the Search box, users are able to select the search phrase on the following:

▼ Filters Search	test	All •
500 CT	Q Find X Clear	Title Short Title
Selected filters - 1	Tags	
Status	Registered ×	Application identifier
0 Project(s) selected / F	ound <b>59</b> items	All

Figure 9 5: The project Search scope.

Search Scope	Remarks
All	Searching scope includes Project Title, Short Title, Tags,
	Application Identifier and Project Identifier.
Title	Searching scope is on Project Titles only.
Short Title	Searching scope is on Project Short Titles only.
Tags	Searching scope is on Project Tags only.
Application Identifier	Searching scope is on Application Identifier of the projects only.

Identifier	Searching scope is on the project identifier.
Identifier	Searching scope is on the project identifier.

Table 9 1: The project Search scope.

#### Tips:

- Click the **Reset** button to clear the search bar.
- To view all projects, leave the search bar blank.
- Click the Export icon (x) to export the project list to a *Comma Separated File* (.csv) file.

# 9.2 Copy Project

The **Copy project** option can be helpful when creating projects in REGIS Internal Portal with similar attributes. As with the **New project** option, you can use the **Copy project** option to create the new project, with basic attributes, and add and update project details and milestones in the Project Viewer.

<b>Start</b> Search		۹	?	<b>a</b> dministrator
Copy project				
Existing project New project number				
	Copy Copy			

Figure 9 6: The copy project screen.

You will not be able to perform any Net related functions for a copied project, such as online expert reviews or milestones submission through the Project Portal; however, you will be able to manage the project as normal for most functions.

1. Search and select the Project ID for the project to copy.

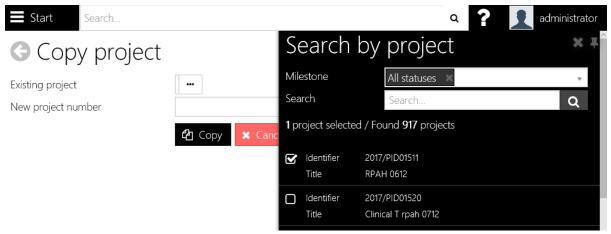


Figure 9 7: The copy project screen.

2. Enter a new project number and click Copy.

<b>Start</b> Search		Q ? administrator
Copy proje	ct	
Existing project	2017/PID00052 ···· - Test REGIS on iPad Pro	
New project number	2017/PID10001	
	Copy X Cancel	

Figure 9 8: Selected existing project and new project number.

3. All standard details, related documents and milestones will be copied to the new project. You will notice that some information e.g. Comments are not copied.

# 9.3 Change project identifier

The project number is used to identify the project within REGIS Internal Portal. You can modify the project number using the Change project identifier option.

1. Search and select the Project ID to change

Start Search				Q	?	administrator
Change proje	ct identifier	Se	earch	by project		× Ŧ
Existing project		Mile	estone			Ŧ
Current project number		Sear	rch	pid10001		٩
New project number		1 pr	oject selected	d / Found <b>1</b> project		
		V	ldentifier Title	2017/PID10001 Test REGIS on iPad Pro		

Figure 9 9: The change project identifier screen.

- 2. Enter the Project ID to confirm.
- 3. Enter a new project number.
- 4. Click **OK.**

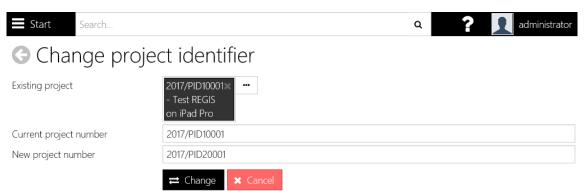


Figure 9 10: The change project identifier screen.

# 9.4 Unlock Project

Many people can open and view the same project at the same time; however, only one person at a time can edit and save changes to a project.

IMI	PORTANT
1	When you select the Project Edit option (either from the search results screen or the Project Viewer floating menu (right hand sidebar), the system will pop-up an alert (bottom right of the screen) to say that the project has been locked. This allows you to edit and save changes without conflicting with other users.
2	A user with role Project Unlock can unlock projects that have been inadvertently locked and are therefore unable to be updated.

Table 9 2: Important points for projects.

E Start	Search		Q	?	administrator

# G Unlock project

Found <b>3</b> projects			x 2
Project identifier	Project 🗸	Locked by	
2017/PID00029	E2E 4 Phase therapy	F1 Solutions, Administr ator	ſ
2017/STE00990	A survey of the understanding, skills and management of Faecal Incontinence (FI) amongs t Australian healthcare professionals LNRSSA/16/CRGH/25	Tamminedi, Padma	<b>P</b>
2017/PID00050	2010 Risk Research	Tamminedi, Padma	₽

Figure 9 11: The Unlock project screen, showing currently locked projects.

End of section Project Management Options

# 10 Application Management

The Application(s) are available upon registration of a project. Users are required to go to the Application page of Projects to fill up the necessary sections and performing submission.



Figure 10 1: The Application home screen.

**Application Search:** Use the application search screen to filter the application list and navigate to the Application Viewer. Use the Application Viewer to view basic application information including a summary of internal and external reviews; create application related tasks and comments and add related documents.

**Manage Reviews**: Expert Reviewers/Reviewers are allocated to applications. They can complete and submit an online assessment and comment on the value of each application. The data is then collated into a report which can be used to inform the outcome of the application.

Process Decision: Decision notification letters are generated, distributed and acknowledged.

Unlock Application: Unlocks available locked applications.

Research Ethics Governance Information System: Launches the REGIS External portal.

# 10.1 Application Search

The Application Search screen allows you to:

- 1. List applications using filter criteria
- 2. View basic information about applications
- 3. Record an eligibility check for an application (if eligibility is turned on for your implementation you will see the eligibility () and download () buttons displayed in the grid).

AND ADDRESS OF ADDRESS OF ADDRESS OF ADDRESS ADDRESS ADDRESS ADDRESS ADDRESS ADDRESS ADDRESS ADDRESS ADDRESS AD		-	75 28										
Available filters - 12		_	Applic	ations 🔳									
Application organisation	10	0	T Filters										
Application Owner		0	Search		2017/ETH01013								Al +
Application Status	- 6	٥			Q Find X Cear								
Applications with classification	- 44	0	0 Application	(s) selected /Found 1 item									R
Eighiky	=	0	a	Application Identifier	100	Suprivit	Current	Stoge	Statut	Submitted date: •*	-	Provact identifier	Traine
Group	Ξ	0	<u>u</u>	Vehicanes entrum	Provide Contraction of Contraction o	COLUMN T	Contract.	ALC: NO.	Part of the	Sublimine Came of	Samu?	under Marcual.	1000
Include deleted applications	Я	0	D	2017/PID10002 2017/ETH01013	Simulation by Josh- Project Applications - HREA		1	Efforts	In Progress	(None)	josh yip@f1solutions.com.my		•
Program	ġ.	0	Items per pa	oe to 🔗									

Figure 10 2: The Application Search screen.

#### Tips:

• Data for applications that are not granted funding will only ever be visible within the Application viewer by searching for applications by status 'Unsuccessful'

### 10.1.1 View all applications

To view all applications, select the Find command and browse through the results.

#### **10.1.2 Search for applications**

To filter the search results using a search filter:

1. Select the arrow to the right of the filter name to add the filter to the filters area of the screen

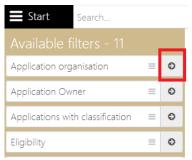


Figure 10 3: Clicking the arrow will add the filter.

2. Select the filter element(s) to search by

Appli	ications $\equiv$			
▼ Filter Search	rs	2017/ETH00985	All	•
Selected Application	filters - 1 n Status		View	×
0 Applicati	on(s) selected /Found 1 iten	In Progress Potential		x
	Application identifier	Recommend Approval Approved	t	Stage
	2017/PID01524 2017/ETH00985	Approved with conditions Approval pending further action by CPI/PI		Ethics
14	Figure 10 4: Se	Decision pending further information electing the options from filter.		

3. Click Find and page through the search results.

#### Notes:

- Select the X to the right of the search filter to remove it from the filters form •
- Select an application in the search results to open the application in the Application • Viewer
- Enter free text into the Search field to limit the search results to applications that include • that keyword, application identifier

# 10.2 Application Viewer

To view the application details in the Application Viewer:

- 1. Search for the application.
- 2. Click the application in the grid.

Appli	cations <mark>≡</mark>													
<b>▼</b> Filter Search	15	2017/ETH00985												9.
Selected Application		Select Some Options											View	×
0 Applicati	on(s) selected /Found 1 ite	m)												X
E	Application identifie	Tile:	Silmit	(Surren)	20 ge	Satur	Solimined dates	(Dwov)	Project chiritifier	Ng.				
0	2017/PID01524 \$2017/ETH00985	Test project 08122017 - HREA	1	ۍ <sup>1</sup>	Ethics	Submitted	11/12/2017 9:43:02 AM	josh yip@fltolutions.com.au	ai -		٠	•	± 🖻	э
Items per p	page 10 •			0										

Figure 10 5: Selecting the application from the search results.

- josh.yip@f1solutions.com.au Start Search. Q ? . 2017/ETH00985 - Test project 08122017 -Submitted Ethics HREA 2017/PID01524 Application Tags (None) ③ ☆ 公 ② Summary Summary Organisations Application Related applications Test project 08122017 - HREA Title Short Title 1 Submit version 1 Current version Ethics Stage Yip, Josh (josh.yip@f1solutions.com.au) Owner (None) Editors (None) Viewers Principal organisation Sydney Local Health District Human Research Ethics Committee - Concord Repatriation General Hospital Start date
- 3. The Application will be shown on the Application Summary page.

Figure 10 6: The application is shown on the applications summary page.

4. Navigate to the *Details*, *Management* and *Evaluation* nodes as required for more information on the application.

#### Notes:

• The floating toolbar includes the following commands:

ß	This is Edit; to create tasks, enter comments and upload additional application related documents.
☆	This is Favourite; to add to the Favourites list on the Application menu.
ආ	This is Copy; to create a copy of the application.
Q	This is Comments; to add comments to the application.
C	This is Unsubmit; to unsubmit the application.
	This is Eligibility; to add and check on the eligibility of the application.
	Table 10 1: The floating toolbar.

• You will not be able to edit an application where the status is 'In progress'.

## 10.3 Eligibility Assessment Wizard

An Eligibility assessment is performed against set criteria. Each criterion is marked as either eligible or not and a comment may be added. A user with delegation eligibility approval A can assess the application and a user with eligibility approval B can approve the assessment and update the eligibility status to either Eligible or Ineligible (alternate statuses may Approved for transfer or Not approved for transfer). Alternately, a user with both Eligibility A & Eligibility B can review and approve in the same step.

1. From the eligibility pane you can choose to **review** the previously performed eligibility review, to record an **assessment** of the review (approve or disprove the recommendation) or to download the **report**.

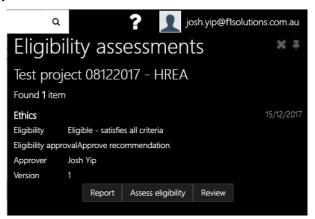


Figure 10 7: The Eligibility Assessments screen for an application.

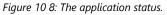
2. Click the + symbol to begin an eligibility assessment. The wizard will step you through the process.

- 3. Select the eligibility icon to display the eligibility assessments pane.
- 4. View the application *and* attachments from the application list or from within the wizard
- Applications and attachments are available for download by clicking
   Download application or
   Download attachments
- 6. A user with both delegation levels can record the eligibility review and approve the review in the same step.

### **10.3.1 Update the status**

IM	PORTANT
1	You must have the application edit role to apply a new status.
2	Note that you must first select the Edit option to view the application in edit mode.
	Table 10 2: Important points for status updates.

ags (None)					8
Timeline	Status				Ø
Classifications	Found 3 items				
Clinical Trial - First Patient	Date ~	Status	User	Date of entry	2
Enrolment	15/12/2017	Eligible	Yip, Josh	15/12/2017	(P)
Clinical trial patient enrolment	11/12/2017	Submitted	Yip, Josh	11/12/2017	අ
Comments	08/12/2017	In Progress	Yip, Josh	08/12/2017	2
Contacts	Items per page 10	•			
Decisions					C
ligibility					2 2
Groups					
History					
Vleetings					
Related documents					
Reviews					
Status	I				



From the Application Viewer heading:

- 1. Ensure you are in Edit mode, else click on the to go to Edit mode.
- 2. Select the Status displayed in the top right hand corner of the Application Viewer.

2017/ETH00985 017/PID01524 998	- Test proj€	ect 081220	17 - HREA	Eligible Not approve Not Authorise
Timeline	Status <b>≡</b>			Submission Pendir Suspende
Classifications	Found 3 items	Terminat Submit		
Clinical Trial - First Patient	Data 😁	Status	User	Withdrawn by applica
Enrolment	15/12/2017	Eligible	Yip, Josh	Decline
Clinical trial patient enrolment	11/12/2017	Submitted	Yip, Josh	Eligib
Comments	08/12/2017	In Progress	Yip, Josh	08/12/2017
Contacts	Items per page 10			

Figure 10 9: The Application status drop-down list for selection.

- 3. Update the status by selecting the required status from the drop-down list.
- 4. Click to save.

#### From the Management node:

- 1. Select Management>Status
- 2. Select the Add Status option from the menu

2017/ETH00985 2017/PID01524 Fage	- Test proj	ect 081220	17 - HREA		Eligible + Ethics
Timeline Classifications		Add status			
Clinical Trial - First Patient	Found 3 items	Statux	User	Date of entry -	x 🖈
Enrolment	15/12/2017	Eligible	Vip, Josh	15/12/2017	P
Clinical trial patient enrolment	11/12/2017	Submitted	Yip, Josh	11/12/2017	4
Comments	08/12/2017	In Progress	Yip, Josh	08/12/2017	0
Contacts	items per page 10	· •			

Figure 10 10: Adding the Application status from the Status menu.

3. Select the Status from the Status dropdown.

+ Add status						
Status date	15/12/2017					
Status	Abandoned					
	🖺 Ok 🗰 Can	cel				
Found 3 items				I		
Found 3 items	Status	User	Date of entry	[		
Found 3 items Date 🛩 15/12/2017			Date of entry 15/12/2017	[		
Date 🛩	Status	User		[		

Figure 10 11: Select the Application status from the Status drop down list.

4. Select **OK** to save the new status.

# 10.4 Manage Reviews

1. Clicking on Manage Reviews displays the Manage Reviews page. There are available filters on the left which are usable by clicking the arrow to the right of the filter to add it into the page for values input/selection.

Start Search.			٩	👔 🤦 🧟 josh.yip@f1solutions.com.au
Available filters - 6			Manage Reviews ≡	
Date created	商	0		
Date due	62	0	▼ Filters Search	- All -
Review type	<b>B</b> .	0	Q Find X Clear	
Reviewers	Ξ	0		X
Applications	=	0	40 Review(s) selected / Found 40 items	In Progress 🔵 Submitted
		-	5' 10 10 T/ M D '	

Figure 10 12: The Manage Reviews page.

2. Note the visualisations on the Manage reviewer access screen provide instant feedback on the status of reviews.

Manage	e Reviev	vs <b>≡</b>					
▼ Filters <sub>Search</sub>		<b>Q</b> Find	× Clear				All 🗸
40 Review(s) sele	ected / Found 40	) items			In Pr	rogress 🌑	Submitted
Name	Review type	Description	Date due	Reviewer count	Application count	Status	
SSA application	Expert Review	test	Not applicable	1	2		Ø
Def 36	Expert Review	check sub hrea	31/12/2017 12:00:00 AM	1	1		ľ
Hrec Review	HREC Review	jhgkgmgh	08/12/2017 3:00:00 PM	1	2		
Eo AR	Expert Review	test	31/12/2017 12:00:00 AM	2	1		Ø
padma 1212	HREC Review	test	27/12/2017 12:00:00 AM	2	1		
test 1	Expert Review	test	30/12/2017 12:00:00 AM	1	1		
test review	Expert Review	test	13/12/2017 12:00:00 AM	1	1		ľ
ETH0990 Review Test	HREC Review	test	13/12/2017 12:00:00 AM	2	1		ľ
test review - basic	HREC Review	test1	15/12/2017 12:00:00 AM	1	1		ľ

Figure 10 13: .Search results and the review statuses.

3. Clicking on the search result item displays the Edit Review page as follows:

Start	Search_		۹	?	administrator
🕒 Edit	Review				
Review de Name Description	etails Expert Neview				
Review type Date due Date created	Expert Review 25/10/2017 12:00:00 AM 15/09/2017 4:49:40 PM				
Applicat	, ippressions				
Review	No applications have bee	en assigned to this review.			

Figure 10 14: The Edit Review screen.

4. Click to edit the selected application. You will be able to change the Name, Description, Review type, Date due, and Date created.

Start Search	h_ Q ? 👤 adm	inistrator
🕝 Edit Rev	view	
Review details <sub>Name</sub>	5 Expert Review	
Description		B
Review type	Expert Review *	
Date due	25/10/2017 × 🗂 at 12:00 AM × O	<u></u>
Date created	15/09/2017 4-49:40 PM	
Applications	Applications =	
Reviewers	No applications have been assigned to this review.	
	ING applications have been assigned to this review.	

Figure 10 15: Click Edit to enable screen in Edit mode.

5. Click on Applications to add any required applications to the review

G Edit Rev	iew							-	
Review details <sub>Name</sub>	Expert Review								
Description	Expertmenter								
Review type	Expert Review								• 🗙
Date due	25/10/2017	ж	<b>11</b>	at	12.00 AM	ж	٥		
Date created	15/09/2017 4:49	:40 PM							
Applications	Applications	=	Ade	d app	olication				
Reviewers	No applica	tions hav	e beer	assi	aned to this re	view.			

Figure 10 16: Click on Applications menu and click Add application to add in application.

6. Click Reviewers to add additional reviewers.

Start Search.							۹	?	adminis	trator
G Edit Revi	ew									
Review details Name Description	Expert Review									
Review type Date due	Expert Review 25/10/2017	×c	3 at	12:00 AM	х	0			•	×
Date created	15/09/2017 4.49	40 PM								
Applications	Reviewers	+ Add	nniawa	r	l					
Reviewers	abert for a start of a	letrinime nvilarosa@p	lanittest	ing.com			Alin	Yes	nitaion O	
	Items per page	0 ~								

Figure 10 17: Click on Reviewers menu and click Add reviewer.

# 10.5 Process Decision

The process decision screen assists you to generate the decision notification letters, distribute them via email, and acknowledge receipt by the applicant. Alternately, you may upload a letter generated outside the system as either a word document or a PDF which will be attached in the email.

Start Search			۹ ?	🧘 admir	vistrator
			Process decision ≡		
Letter created	m	0	▼ Filters	0	•
Email created	台	0	Q Find	v	•
Applications	=	0	27		
Decision status	12	0	Selected filters - 1 Pending generation Pending email		
			Notification status	÷	×

Figure 10 18: The Process Decision screen.

#### Tip:

- This process can be performed end-to-end for a single application, or you may choose to send all emails in a single action. For more information on sending the decision emails in bulk see **Bulk Decision Email** section below.
  - 1. Select Applications>Process Decision.
  - 2. Select the Decision Status and/or Notification Status.

Start Search_			a <b>?</b>	🤦 admir	vistrator
			Process decision ≡		
Letter created	m	0	▼ Filters	0	0
Email created	曲	0	Q Find	v	•
Applications	=	0			
Decision status	-	0	Selected filters - 1 Pending generation Pending email		
			Notification status	÷	×

Figure 10 19: The Process Decision screen.

- 3. Click Find. The results are shown on the same page.
- 4. Click to select the application.

### **10.5.1 Bulk Decision Email**

You may choose to send all decision emails at the same time. Before beginning this process, ensure that the notification status is 'Pending generation' i.e. the letter has been generated (if required) and uploaded for each application. To send the decision email in bulk:

- 1. Select Process Decision
- 2. Select Notification Status "Pending Generation"
- 3. Select the Items per page 'All'
- 4. Select the checkbox to select all items on the page

Tip: To review the letters prior to sending, select **Bulk Download** from the menu.

5. Select **Bulk send email** 

Process decisi	ion ≡	📥 Bulk down	load						
▼ Filters	٩	📥 Bulk send Find	email						
Found 8 items									R
🔲 Application identifier 🔿									
<b>☞</b> 2017/ETH00054	Ethics	Ethics	Pam Hughes	Sydney Local Health District Human Research Ethics Committee - Concord Repatriation General Hospital	Approved	Pam Hughes	Pending generation	8	۲
☑ 2017/ETH00949	Ethics	Ethics	Padma Tamminedi	ACT Health Human Research Ethics Committee	Approved	Padma Tamminedi	Pending generation	Ø	۲
				Joint University of					

Figure 10 20: The Bulk send email option.

6. The following notification will be displayed

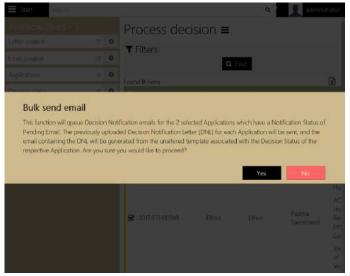


Figure 10 21: The Bulk send email confirmation screen.

7. Select Yes to confirm the action

The emails are sent to the Pending Emails queue. To access the Pending Emails queue you must be a user with Admin role.

# 11 Reporting

REGIS Internal Portal consists of System reports and the ability to create custom reports using the Report designer. Reports that you have accessed recently are listed in the *Recent Reports* list. You can mark reports you access regularly as favourites and they will always appear in the *Favourites* list.

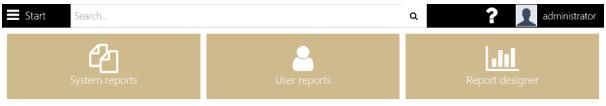


Figure 11 1: The Report home screen.

# 11.1 System Defined Reports

The **System defined** reports are presented in a structured manner according to function. To view the system defined report:

- 1. Start > Reports
- 2. Select System Reports

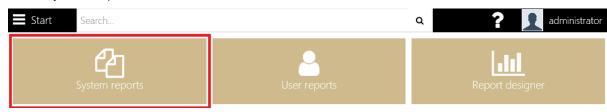


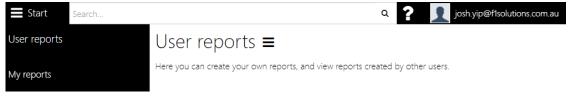
Figure 11 2: The System reports menu.

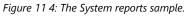
#### 3. Select a report sub-menu, e.g. Application

Start Search	م ۲ administrator
Reports	System reports Select a report from the menu to the left to load and run a System Report.
Expert Review	
	Figure 11 3: The System reports sample.

## 11.2 User Reports

Reports that you create, or that have been shared with you, are visible in **User Reports** > My Reports.





To run a report:

- 1. Select the report from the menu
- 2. The report viewer opens and the report is loaded

## 11.3 Report designer

The Report designer page takes you straight to the download page. Select **Install** to download a setup file. You can find the setup file in the downloads folder or on the downloads toolbar.

F1 Solutions Dashboard Designer	×
Name	Dashboard Designer
Publisher	F1 Solutions
The following prerequisi Microsoft .NET Fram	tes are required: nework 4.5.1 (x86 and x64)
	already installed, you can <b>launch</b> the application now. on below to install the prerequisites and run the application.
	📩 Install

*Figure 11 5: The Dashboard/Report Designer download prompt.* 

#### Notes:

- You can download the report designer from the User reports menu or from the Report Designer page.
- Select the Star 🖆 in the floating toolbar to mark the report as a favourite
- Select the Share option to share a report with another user (this may be a report you have designed or that has been shared with you)
- Select the Delete option to remove the report from your User Reports menu. If you have shared this report with another user, selecting Delete will not remove the report from their My reports menu. If a user shared the report with you, you can select Delete without impacting the original users access to the report.

To download Dashboard/Report Designer:

1. Select the Setup file and follow the prompts to install the Dashboard/Report designer.

F1 Solutions Dashboard Designer	\$
Name Publisher	Dashboard Designer F1 Solutions
The following prerequisites are req Microsoft .NET Framework 4.5	
	talled, you can <b>launch</b> the application now. o install the prerequisites and run the application.
	🛓 Install

Figure 11 6: The Dashboard/Report Designer download prompt.

2. Select the Report designer

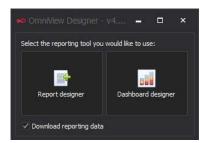


Figure 11 7: The Dashboard/Report Designer selection after successful installation.

- 3. Select the New report option to launch the query designer.
- 4. See the Creating a data source topic for information on using the Query designer
- 5. Design your report
- 6. Select Server > Save or Server > Save As (only reports saved to the Server are visible within REGIS Internal Portal)
- 7. Enter a name for the report
- 8. Enter a description of the report
- 9. Select OK
- 10. The report is now visible in the User reports list

## 11.4 Share a report

To share a report:

- 1. Select the report from the User Reports > My reports menu to view the report in the report viewer.
- 2. Select the Share option from the floating toolbar.

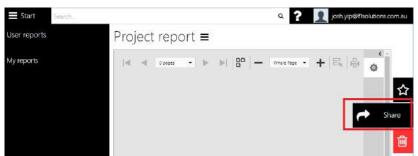


Figure 11 8: Sharing of user report(s).

- 3. Click the + icon to display the User search pane (on the right hand side of the screen)
- 4. Search for the person you would like to share the report with.





Figure 11 9: Sharing of user report(s).

5. Select the person from the list.



Figure 11 10: Selecting user(s) to share report with.

- 6. Repeat steps 4 and 5 as many times as you require
- 7. Select the **Share** button.
- 8. The report is now listed in the My reports menu for each person you selected to share the report with.

End of section Reporting

# 12 Meetings

### 12.1.1 Meetings

The Meeting feature facilitates the creation of meeting events and invitations related to applications and projects.

To create a new meeting:

1. Click on Create new meeting from the menu.

③ New Mee	ting				
Meeting details					
Title					
Туре	(None)				
Date	dd/mm/yyyy	0	at	Ø	
Submission Closing	dd/mm/yyyy	0	at	Ø	
Status	Active				

Figure 12 1: Selecting user(s) to share report with.

2. Key in and select the necessary values.

#### 12.1.2 Attendees

1. From the Attendees sub-screen menu, click Add Attendee and search for a user.

G New Mee	ting			Add Users	0
				jash	Q
Meeting details				🗹 🛛 🛛 user selected / Found	d 1 item
Title				✓ User name josh.yip@f1	solutions.com.au
Туре	(None)			Person name Yip, Josh	
Date	dd/mm/yyyy	🗂 at	٥		
Submission Closing	dd/mm/yyyy	🗂 at	o		
Status	Active				
	Attendees 🔳	+ Add attendee			
ATTENDEES	No attendees h	nave been assigned	to this meeting.		
	N				
APPLICATIONS					

Figure 12 2: Selecting attendee(s) to add into meeting.

- 2. Check on the box the left of the user.
- 3. Click with to add as attendee to the meeting.

#### **12.1.3 Applications**

- 1. From the Applications sub-menu, click Add application.
- 2. Search for application(s) based on a program or status, or just click Search.

- 3. Select application(s) by checking/ticking the box beside an application.
- 4. Click with to add selected application(s) to the meeting.

New Mee	ting				2	earch	by application	
Meeting details					Pro Sta	igram tus		-
Title					Sea	arch	Search	Q
Туре	(None)					1 applicat	tion selected / Found <b>46</b> applications	
Date	dd/mm/yyyy		at	ø	R	Identifier	2017/ETH00001	
Submission Closing	dd/mm/yyyy	•	at	٥		Stage	Ethics	
Status	Active					Title	A1-Application Ethics	
					0	identifier Stage	2017/ETH00002 Ethics	
	Applications <b>E</b>	+ Ad	d application			Title	A1.1-Application Ethics	
		🖬 Se	nd Email		0	Identifier	2017/ETH00003	
ATTENDEES	No application	have been	assigned to this	meeting.		Stage	Ethics	
					_	Title	A12-Application Ethics	
APPLICATIONS						identifier	2017/ETH00913	
						Stage Title	Ethics A1.3-Application Ethics	

*Figure 12 3: Selecting Application(s) to add into meeting.* 

### 12.1.4 Milestones

- 1. From the Applications sub-menu, click Add milestone.
- 2. Search for milestone(s) based on a program or status, or just click Search.
- 3. Select milestone(s) by checking/ticking the box beside an application.
- 4. Click we to add selected milestone(s) to the meeting.

O New Mee	ting		Search	by milestone	34			
Meeting details	3		Program Status	-				
Title			Search	Search	Q			
Type	(None)				1 milestone	e selected / Found <b>999</b> milestones		
Date	dd/mm/yyyy	C	at	Ø				
Submission Closing	dd/mm/yyyy		at	0	<ul> <li>Project identifier2017/ETH00305</li> <li>Millestone title Progress Report</li> </ul>			
Status	Active				Milestone ty	pe Progress Report		
	Milestones 🔳	+ Add r	milestone		Milestone tid	iñe:2017/ETH0005D le: Progress Report pe Progress Report		
ATTENDERS	• No miestones	Send Send		s meeting.	Milestone tit	afier2017/ETH00503 le Progress Report pe Progress Report		
APPLICATIONS					Milestone tit	ifier2017/ETH00504 le: Progress Report pe Progress Report		
MILESTONES					Concerning of the local division of the loca	iñer2017/ETH00505 le Progress Report		

Figure 12 4: Selecting milestone(s) to add into meeting.

### **12.1.5 Amendments & Other Notifications**

- 1. From the Amendments & Other Notifications sub-menu, click Add related document.
- 2. Search for document(s) based on Project/Application, a program, document type or just click Search.
- 3. Select document (s) by checking/ticking the box beside a document.

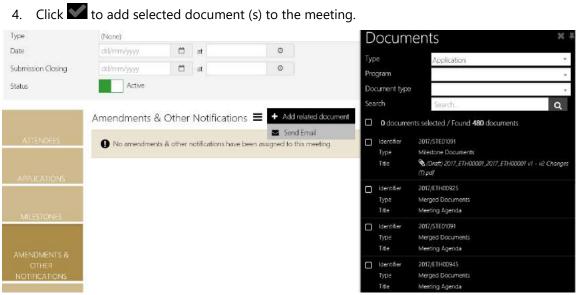


Figure 12 5: Selecting document(s) to add into meeting.

### 12.1.6 Meeting Documents & Other Business

- 1. From the Amendments & Other Notifications sub-menu, click Add document.
- Upload required documents by clicking on the box or just drag a document from other 2. location and drop into box.
- 3. Click Upload.

4.

	Meeting Documents & Other Business =
ATTENDEES	Click or drop your files here
APPLICATIONS	1 Upload X Cancel
	No meeting documents & other business have been assigned to this meeting.
MILESTONES	
AMENDMENTS & OTHER NOTHER	
MEETING DOCUMENTS & OTHER BUSINESS	
	Figure 12 6: Uploading document(s) to add into meeting.

End of section Meetings

# 13 The Project Viewer

The Milestone Summary view is the default project viewer screen. From here you can navigate to the *Details, Management* or *Evaluation* nodes or select a milestone to view the milestone details.

If you have Edit Project role you may select the *Edit* option (from the floating toolbar on the right hand side) and modify the project data. As you navigate away from a screen the system will automatically save any changes you have made. To cancel your changes, select the red cancel button before you navigate to the next page.

If the project is locked by another user, the lock icon will appear. Hover over the icon to view the username. If the project has been locked inadvertently, ask your system administrator to unlock the project.

If you are viewing the project in view only mode, you may click on the eye icon to view tasks, issues, risks and contact details.

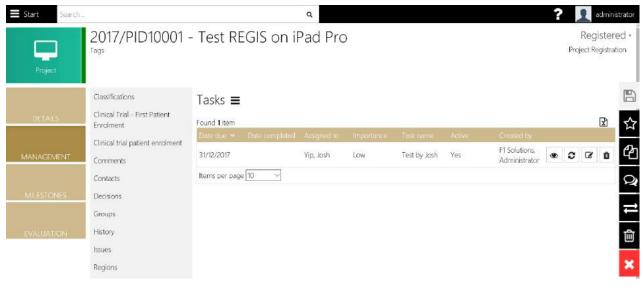


Figure 13 1: The Tasks screen, under Project Management.

# 13.1 Milestone Processing

The Milestones node is the default view for the project. By default, milestones are grouped by Expenditure and Income.

<b>Start</b> Search					۹		?	administra	tor
Project	2017/STE Tags (None)	:11111 - fgk	Innk					Registered Site	
	Milestone	summary						(	ľ
DETAILS	<b>▼</b> Filters							0	
MANAGEMENT	Group by		(None)	Reset				- (	2
MILESTONES	<b>ևև</b> Graphs	i						0	Q
EVALUATION	Milestones Found 5 items							x)	
	Title		Date received	1					
	jfashd	04/12/2017			External Review	Progress Report		REGIS	
	cfhlgn	05/12/2017			Awaiting	Progress		NSW	

Figure 13 2: The Milestone Summary.

### Tips:

- Select Organisation in the Group By dropdown to group by organisation
- Enter search text in the filter box to view only milestones that match the search text
- Select a milestone in the grid to view the milestone details and process the milestone.
- Where a milestone report has been uploaded in either the Project Portal or when processing (Attach Minutes step) a document icon is displayed in the milestone view

Start Search			Q				?	administrat	tor
Project	2017/PID10001 Tags	- Test REGIS o	n iPad Pro					Registered Project Registratio	n
	Milestone summa	ary 🔳						C.	5
DETAILS	<b>▼</b> Filters Filter							٥	\$
MANAGEMENT	Group by	(None) Q Find Reset						_	ት ⊋
MILESTONES	Lul Graphs							•	י¥ דו
EVALUATION	Milestones Found 1 item							c I	Ì
	Title Current due o	lato 🔦 Date receiver 📑	Status	Precid	Type	Amount Unp	aid amount	triv received in a	×
	test by Josh 31/12/2017	6	Pending		Progress Report	\$0.00	\$0.00		
	Amount		-			\$0.00			

Figure 13 3: The document indicator for milestone in project, shown in Milestone Summary.

### 13.1.1 Milestone Menu

The milestone details page lists detailed information on the selected milestone. In edit mode (select the Edit option from the floating toolbar to the right) menu options may include the following options:

Start Search			Q		? 👤 admin
Project	2017/PID100 Tags	01 - Test REGIS o	n iPad Pro		Register Project Registra
	Information	31/12/2017 - Pro	ogress Report - test by J	$osh \equiv \mathbf{A}$ Change title	
	Detail			🖋 Change type	
	Justification	Milestone details		🛗 Change date	
	Documents	Milestone title	test by Josh	I Receive milestone	
MANAGEMENT		Milestone type	Progress Report	<b>as</b> Process milestone	
	Actions	Organisation	REGIS (Principal)		*
	History	Status	Pending	Delete milestone	
MILESTONES	Milestone review	Status effective date	(None)		
		Milestone amount	\$0.00		
			Graphs not supported for this browser.		

Figure 13 4: The available options for milestone summary.

Menu Option	Remarks
Change title	A milestone title is optional information to assist users to identify milestones.
Change type	The milestone type is important for identifying milestone behaviour and the information saved with the milestone.
Change date	Often when one milestone date changes, milestones down the track are impacted. The milestone date wizard steps you through the process of entering a new date and viewing a list of milestone impacted by selecting the offset option.
Receive milestone	Enter the received date to record when the milestone report was received. Note that this may be different to the processed date.
Process milestone	<ul> <li>The process milestone wizard has four steps for recording information about a milestone and payment information.</li> <li>Step 1: update the received date and select a status for the milestone (mandatory)</li> <li>Step 2: enter a performance rating for the milestone (optional)</li> <li>Step 3: enter information relating to outputs (optional)</li> <li>Step 4: enter payment information (optional)</li> </ul>
Undo milestone	The undo milestone can be used to remove the milestone processing data and milestone received date.
Delete milestone	The delete milestone option will remove all milestone data. You can only delete a milestone that has a status of Pending or Received.

Table 13 1: The available options for milestone summary.

## **13.1.2 Milestone Information Pages**

This milestone information pages give you a summary of milestone details and dates. You can modify the organisation and milestone amount in the form. The dates, title and type can be edited via menu options. Each of the pages is described below.

Page	Remarks
Milestone detail	The milestone detail text box can be updated to include information relevant to the milestone both prior to processing and after processing the milestone for payment.
Milestone justification	The milestone justification text box can be updated to include information relevant to the milestone both prior to processing and after processing the milestone for payment.
Milestone documents	Milestone related documents can be submitted from the REGIS External Portal. These can be viewed and downloaded from this page.
Milestone actions	Overdue milestone reminders and processing emails are detailed in the milestone actions screen. You can add a use generated milestone action by selecting the Add milestone action option from the menu.
Milestone ratings	Ratings are used to record the quality of the milestone report.
Milestone history	All system and user generated actions are recorded and can be viewed in details in the history pane. Select the arrow to display or hide the details. All populated fields and fields that have changed are recorded.
External assessments	External Milestone Assessments are created and managed in this screen. Select the Information icon (*) to view details of the milestone. In edit mode you will be able to.

Table 13 2: The project milestones' available pages.

#### Tips:

IMPORTANT1Once a milestone is processed you can't change data on the information page.

Table 13 3: The important points for project milestones.

## 13.1.3 Change Milestone title

To change the title of a milestone:

- 1. Select the milestone in Edit mode
- 2. Select the Change Title option from the menu

Information	31/12/2017 - P	rogress Report - test by Josh 🔳	
Detail		an de la construction de la proprieta de la construction de la	
Justification	<b>A</b> Change mile	estone title	
Documents	Milestone title	test by Josh	×
Actions		🖺 Save 🗱 Cancel	
History			
Milestone review	Milestone details	6	
IMITESIONE LEVIEW	Milestone title	test by Josh	
	Figu	ure 13 5: The Change Milestone Title screen.	

- 3. Complete the form
- 4. Select Save.

### **13.1.4 Change Milestone Type**

1. Select the Milestone in Edit mode

Information	31/12/2017 - Pr	rogress Report - test by Josh 🔳	
Detail		<b>.</b>	
Justification	🖋 Change miles	stone type	
Documents	Milestone type	Progress Report	
Actions		Save X Cancel	
History			
Milestone review	Milestone details		
	Milestone title	test by Josh	
	Fiau	re 13 6: The Chanae Milestone Type screen.	

- 2. Select the Change Milestone Type option from the menu
- 3. Complete the form
- 4. Select Save

### 13.1.5 Change Milestone Date

Often when one milestone date changes, milestones down the track are impacted. The milestone date wizard steps you through the process of entering a new date and selecting the offset options.

- 1. Select the milestone in edit mode
- 2. Select the Change Date option
- 3. Enter the new date and a reason

Start Search			م 👔 administrator
Change mi	lestone d	date wizard	
1. Change milestone d	iate 🔪 2. Milestone	date offset	×
Change	milestone da	te	
Milesto Original d Current d New due Foreca Original d Current d New due Reason	lue date lue date date nst lue date lue date	31/12/2017 31/12/2017 31/12/2017 31/12/2017 31/12/2017 31/12/2017	

Figure 13 7: The Change Milestone Date screen.

- 4. Select the Next step
- 5. Select the Offset option (Yes or No)
- 6. Click the **Finalise** button
- 7. Select yes to generate an email
- 8. Enter the email details
- 9. Select Send

#### **Receive a milestone**

Enter the received date to record when the milestone report was received. Note that this may be different to the processed date.

- 1. Select the milestone in edit mode
- 2. Select the Receive milestone option

Information	31/12/2017 - Progre	ess Report - test by Josh 🔳
Detail		NUMBER VOLMMENT - DAVISIONE - SUBJECT SUBJECT - SUBJECT
Justification	🖬 Receive milestone	
Documents	Milestone received	18/12/2017
Actions		🖹 Save 🗶 Cancel
History		
Milestone review	Milestone details	
	Milestone title	test by Josh

Figure 13 8: The Change Milestone receive milestone screen.

- 3. Complete the form
- 4. Select Save

#### 13.1.6 Process a Milestone

The process milestone wizard has four main steps. Additional steps may be included if the *External Milestone Assessment* feature is enabled.

Information	04/12/2017 - P	04/12/2017 - Progress Report - jfashd ≡			
Detail			🖋 Change type		
lustification	Milestone details		🛗 Change forecast date		
Documents	Milestone title	jfashd	🖌 Receive milestone		
	Milestone type	Progress Report	📽 Process milestone		
Actions	Organisation	REGIS			
Ratings	Status	External Review	O Undo Milestone		

Figure 13 9: The process milestone menu.

1. Update the received date and select a status for the milestone (mandatory)

rocess m	ilestone wiz	zard				
Milestone Review	2. Process milestone	3. Attach minutes	4. Rate milestone	5. Send milesto	ne email	3
- 200	D i		Graph	not supported fo	r this browser	
lf you p	ne Review w Milestone Review exis roceed and mark this Mi ed. You may also manua	estone as Achieved c	or Not Achieved, any I	n Progress assessr	nents will be marke	d as
The belo If you p Cancelle Assess	ow Milestone Review exit roceed and mark this Mi ad. You may also manua rr	lestone as Achieved c Ily delete them from t Status	ar Not Achieved, any l the list below if they a Assign	n Progress assessr e no longer requi	nents will be marke	
The belo If you p Cancelle Assess	ow Milestone Review exis roceed and mark this Mi ad. You may also manua	lestone as Achieved c Ily delete them from t	ar Not Achieved, any l the list below if they a Assign	n Progress assessr e no longer requi	nents will be marke red.	rd as
The belo If you p Cancello Assesso F1 Solut	ow Milestone Review exit roceed and mark this Mi ad. You may also manua rr	lestone as Achieved c Ily delete them from t Status	or Not Achieved, any I the list below if they a Assign s 05/12/:	n Progress assessr e no longer requi ed v 2017	nents will be marke red.	

Figure 13 10: The process milestone wizard.

- 2. Attach minutes (optional)
- 3. Enter a performance rating for the milestone (optional)
- 4. Enter payment information (optional)
- 5. Review and send email (optional)

#### Tip:

- You may attach multiple files to the email at the Send email step. Click or drop your file on the drop zone to attach it to the email.
- System generated emails can be viewed in the Pending Emails queue (for users with System role only).

E Start	Search .	٩	? 🤦 administrator				
Proc	ess milest	one wizard					
1. Milesto	me Review 2. Proc	cess milestone 3. Attach minutes 4. Rate milestone 5. Send miles	tone email				
	Send milestor	ne email					
	Send email	Yes					
	From	testuser1@f1solutions.com.au					
1	То	\${ChiefinvestigatorEmail}					
/	Ce	\$(ApplicationAdministrationEmail)					
/	Bcc						
/	Subject	Subject 2017/STE11111: 04/12/2017 - Progress Report					
(	Attachments	(None)					
		Click or drop your files here					
	Body	B I 型 ¶∽ ⊨ ≔ % ⊃ ⊂					
		Re: 2017/STE11111 fgklnnk	<u>^</u>				
		Dear \${ChiefInvestigatorName},					

Figure 13 11: The process milestone wizard.

### 13.1.7 Undo Milestone

The undo milestone can be used to remove the milestone processing data and milestone received date. It will also undo any acquittal data and the acquittal document associated with the milestone.

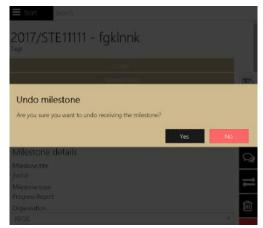


Figure 13 12: The process milestone undo prompts confirmation.

### **13.1.8 Delete Milestone**

The delete milestone option will remove all milestone data. You can only delete a milestone that has a status of Pending or Received.

Milestones Found 6 items					R
	Current due dans 🤦 Date received 🔒				
jfashd	04/12/2017	External Review	Progress Report	REGIS	Ø
efhfgn	05/12/2017	Awaiting processing	Progress Report	NSW Jurisdiction	ß
rvbg	05/12/2017	External Review	First Patient In	Site Organisation (Principal)	Ø
rdtgv	05/12/2017	External Review	First Patient In	Site Organisation (Principal)	œ
asdasd	05/12/2017	Pending	Progress Report	Site Organisation (Principal)	2 8
PaymentEnabledRecoupme	entDisabled. 18/12/2017	Pending	PaymentEnabledRecoupmentDisabled	Site Organisation (Principal)	6 0

Figure 13 13: The process milestone undo prompts confirmation.

# 13.2 Project viewer – Details

#### Summary

The Summary screen displays project and application information. If your user role allows you to edit

a project, you will be able to select the Edit option from the floating toolbar and update information for the project as required.

When in Edit mode you will be able to select additional options from the menu including:

1. Change project start date: This wizard will step you through changing the start date with the option for flow-on changes to project milestones, cash contributions, project end date, and contributions by application and other. If you change the project start date forward or backward by x number of days, each of these elements will be adjusted accordingly.

- 2. Perform a project variation: The project variation wizard is covered in more detail below. This wizard allows you to quickly change all project dates, add and remove contacts, and create a variation to the contract with all the updated details.
- 3. Update Priority Mapping: Selecting this option will update the program, national and rural research priorities and classifications using a predefined set of metadata.

Start Suarch.			۹	? 👤 edminis
Project	2017/ETH009 Tags	77 - A5.2-Appl	ication Ethics	Registere Et
	Summary	Summary ≡		
DETAILS	Organisations			
	Related applications	No Owner has been seen as been seen as been seen as a second s	in assigned to this project.	
MANAGEMENT		Project		11
			Internet	
MILESTONES		Program	Ethics	
		in e	A5.2-Application Ethics	
		Short Title		
EXALUATION		Owner		-
	Figuro	13 11. The project of	ummany screen	

Figure 13 14: The project summary screen.

#### Tips:

- The project start and end dates are used to generate year based reports .
- An application transferred from REGIS External Portal will have a unique Application ID. If the • application was created in REGIS Internal Portal, you will see the text 'No link to REGIS External Portal application'
- The nodes visible in the Details pane will vary between application types and depending on • whether the application is created in REGIS External Portal or REGIS Internal Portal
- The Project Owner dropdown allows you to allocate a project owner. The project owner is • able to view and manage details of the project in the project portal e.g. upload milestone reports, view project agreement and manage KPIs. For more information on the Project Portal view the help for REGIS External Portal end users and search for project portal.

#### **Organisations**

The organisations listed are linked to the project in some way. There is only ever one principal provider.

Start Search			٩				?	1	admin
Project	2017/STE11111 Tags	I - fgklnnk						Re	egiste
DETAILS	Summaty Organisations	Organisatio	ns 🔳						×
	Related applications	R&D Provider 🐱	Principal provider	Organisation type	Austilication	Relationship			
	Need	Site Organisation	Yes				۲	Ø	Û
		REGIS	No				۲	Ø	Û
		NSW Health	No				۲	Ø	Û
MILES CINES		Items per page 10	Ŷ						

Figure 13 15: The project organisation screen.

#### Tips:

- To view the organisation in REGIS Contact Relationship Management, you must have the correct permissions levels
- You must have one principal provider
- Select the edit option to add a new organisation or alter the principal provider setting
- Select a new principal provider to change this setting
- To add additional organisations to the list select the Add option from the menu
- Select the Save option or navigate away from the screen to permanently save your changes

#### **Related** applications

The relating application(s) are displayed in the Related applications screen:

2017/PID10002 - Simulation by Josh-Project Applications							Register Project Registra	
Summary	Related app	olications						
Organisations	Identifier	Tele	Pipgram	Developmentation	Principal Contact	51-010	Relationship	
Related applications	2017/PID10002 2017/ETH01013	Simulation by Josh-Project Applications - HREA	N # ROCK WIT	Cognitianion	- III A- per toor I date	In Progress	The second s	

Figure 13 16: The related applications of the project.

### **13.2.1 Change project start date**

Select Change Project Start date from the menu to change the start date and make flow-on adjustments to the project milestone dates, project end date, and contribution dates.

To change the project dates:

- 1. Select the Summary page in the Project Viewer
- 2. Select Change project start date



Figure 13 17 : Change project start date menu.

Summary	Summary <b>≡</b>		
Organisations	2		
Related applications	No Owner has been as	ssigned to this project.	
	Change project sta	art date	
	Flow on change	Yes	
	This process changes the start date of the project and makes all necessary flow-on adjustments to:		
	<ul> <li>Project milestones</li> <li>Cash contributions</li> </ul>		
	Project end date		
	<ul> <li>Contributions by applic</li> </ul>		
	<ul> <li>Contributions by other</li> </ul>		
	Current start date	20/10/2017	
	New start date	20/10/2017	
		🖹 Save 🗶 Cancel	

Figure 13 18 : Change project start date.

- 3. Select Flow on change to change all listed project elements
- 4. Enter a new start date
- 5. Select Save.

# 13.3 Project Viewer – Evaluation

## **13.3.1 Internal Reviewers**

The details of an internal assessment can be recorded on the Internal Assessment page. You can record as many internal assessments as required.

	External Assessments	External Assess	iments			
DETAILS	Internal Assessments	Found 4 (tem(s)				
DETRIL		Assessor 🔺	Application type	Review date	Status	
		Test, User1	Pre-Research Proposal	08/12/2014	Finalsed	0
INAGEMENT		Test, User10	Pre-Recearch Proposal		Unfinalised	~
		Tect, Uper2	Pre-Recearch Proposal	03/12/2014	Finalced	0
		Test, User3	Pre-Recearch Proposal		Unfinalised	~
ELESTONES	-					
ALUATION						

Tips:

- Select the Add Assessment option and enter a name for the assessment
- Enter comments (Summary page), attractiveness scores (Attractiveness page) and Feasibility scores (Feasibility page)
- Select the Assessment scores have been reviewed checkbox on the Summary page
- Click the Finalised button in the Internal Assessments grid to finalise the assessment

# 13.4 Project Viewer - Management

## **13.4.1 Classifications**

Classifications can be added to projects to make it easier to generate reports or to search for projects with the same classification. To add a classification to a project:

- 1. Open the project in Edit mode
- 2. Select Management>Classifications
- 3. Select Add classification

E Start Search.	- 4-1	٩	adr
Project	2017/STE11111 - Tags	- fgklnnk	Regist
	Classifications	Classifications = + Add classification	
DETAILS	Clinical Trial - First Patient Enrolment	You must enter the following mandatory classifications:	
	Figure 13	19 : The project classification screen.	

4. Select the classification name.

017/STE11111 - fg	jklnnk
	<u>j</u> klnnk

Classifications	Classificat	ions 🔳	
Clinical Trial - First Patient Enrolment	A You mus	enter the following mandatory classifications:	
Comments		I must enter a Study type Classification and Value	2
Contacts		u must enter a Clinical trial type Classification and u must enter a Clinical trial phase Classification an	
Decisions	<ul> <li>You must enter a Ethics pathway Classification and Value</li> <li>You must enter a HREC Host Organisation Classification and Value</li> </ul>		
Groups	You must enter a CTN/CTX Classification and Value		
History	<ul> <li>You must enter a Risk Category Classification and Value</li> <li>You must enter a Prior ethics outcomes Classification and Value</li> </ul>		
lssues	• Yo	a must enter a Category of research Classification	and Value
Regions			
Related documents	+ Add cla	ssification	
Status	Name	Clinical trial type	
Tasks	Value	Clinical trial (other)	-
Timeline		V Ok 🗶 Cancel	

Figure 13 20 : The project classification data entry fields.

5. Select the classification value

Register

### 6. Click OK

Classifications	Classifications <b>≡</b>		
Clinical Trial - First Patient Enrolment Comments Contacts	You must enter the fo You must enter You must enter You must enter You must enter	ollowing mandatory classifications a Study type Classification and Value a Clinical trial type Classification and Value a Clinical trial phase Classification and Value a Ethics pathway Classification and Value	2
Decisions Groups History	<ul> <li>You must enter</li> <li>You must enter</li> <li>You must enter</li> </ul>	a HREC Host Organisation Classification and a CTN/CTX Classification and Value a Risk Category Classification and Value a Prior ethics outcomes Classification and Va	
Issues	You must enter	a Category of research Classification and Va	lue
Regions	Found 1 item		x
Related documents	Name 🛩		
Status	Clinical trial type	Clinical trial (other)	Û
Tasks	ltems per page 10 🛛 💛		
Timeline			

Figure 13 21 : The project classification data entered.

### Tips:

- You can add as many classifications as you like to a project.
- If a classification is required, a message will appear at the top of the page.
- If the number of values that can be added for a classification name is exceeded, a message will appear.

### 13.4.2 Clinical Trial – First Patient Enrolment

#### The Clinical Trial – First Patient Enrolment is accessible as follows:

2017/STE11111	- fgklnnk	Regis
ags		
Classifications	Clinical Trial - First	t Patient Enrolment ≡
Clinical Trial - First Pabent Enrolment		
Comments	➡ Add Date first enrolled	dd/mm/yyyy
Contacts	More than 40 days?	No
Decisions	Valid reason?	
Groups	Comments	
History	Target No.	
Issues	Min enrolment target Max enrolment target	
Regions		✓ Ok 🗶 Cancel
Related documents	Found <b>0</b> items	
Status		ient enrolment have been assigned to this project.
Tasks	• No cinical trai - first pac	ient ersonrent nave been asigned to this project.
Timeline		

Figure 13 22 : The Clinical Trial – First Patient Enrolment.

# 2017/STE11111 - fgklnnk

Classifications	Clinical Trial - Fi	irst Patient Er	rolment i	=		
Clinical Trial - First Patient Enrolment	+ Add					
Comments	Date first enrolled	29/12/2017	8			
Contacts	More than 40 days?	Ye	25			
Decisions	Valid reason?	Test by Jos	h			
Groups	Comments	Test by jos	h			
History	Target No. Min enrolment target			0		
Issues	Max enrolment target			80		
Regions		🖌 Ok	X Cancel			
Related documents	Found <b>1</b> item					
Status	Order Date first enrolled	More than 40 days?	Valid reason?	Comments	Target No.	Mir
Tasks	1 22/12/2017	Yes	Test purposes		132	0
Timeline	5		16			2

Figure 13 23 : The Clinical Trial – First Patient Enrolment – data entry.

### 13.4.3 Comments Log

Comments can be viewed and created from the project comments screen or from the project comments node.

2017/STE11111 Tags	- fgklnnk	Register
Classifications Clinical Trial - First Patient Enrolment	Comments = + Add Comment	
Comments	Ho comments have been assigned to only project.	
Contacts		

Figure 13 24 : The Comments screen.

1. Click the + symbol to create a new comment.



Registe

Figure 13 25 : The Comments screen.

2. Type the comments in the box and click OK.

2017/STE11111 - fgklnnk

2017/STE11111 - fgklnnk Tags	Registe
1493	

Classifications	Comments =
Clinical Trial - First Patient Enrolment	
Comments	<b>1</b>
Contacts	
Decisions	V Ok K Cancel
Groups	FI Solutions, Administrator
History	Project to commence after Christmas as soon as possible.

Figure 13 26 : The Comments screen.

3. Alternatively, you may click on the tright from the floating menu and the following is displayed from the right side of the screen.



Figure 13 27 : The Comments screen from the floating menu.

4. Note that you can only delete your own comment, but you can view comments added by all users.



Figure 13 28 : The Comments which are available from different users.

5. The user photo is maintained in REGIS Contact Relationship Management.

### 13.4.4 Contacts

Project contacts are added during the transfer process using the contact information entered into the application. They can be updated and added to during the life of the project.

2017/STE11111 · Tags	• fgklnnk										Reg	giste
Classifications Clinical Trial - First Patient	Contacts											
Comments	<b>▼</b> Filters <sub>Status</sub>	All										
Contacts	Found 1 item											R
Decisions	Vele 🛩											
Groups		in Donda, Robert ir uca -Multiple	L	Robert.Donda@fl solutions.com.au	01/12/2017		Multiple	Multiple		۲	Ø	۵
History	Items per page	10 🔗										



### 1. Click Add contact from the menu.

2017/STE11111	- fgklnnk									Reg	giste
Classifications	Contacts =	Add contact									
Clinical Trial - First Patient Enrolment Comments	▼ Filters Status	All									
Contacts	Found 1 itum										
Decisions	ficht 🗠										. Sele
Groups	Coordinating Principal In Vestigator	Donda, Robert Luca -Multiplo	Robert.Donda@fbolutio hs.com.au	01/12/2017		Multipla	Multiple	2	۲	ß	ŵ
History	Items per page 10	4									

*Figure 13 30 : Adding a Contact to a project.* 

2. Select the person icon to view the contact in REGIS Contact Relationship Management.

Search New	Contact admin Cor	남 ntact groups	<b>₩</b>	Ö Settings	CRM
Quick Search		and Brooks	al approximation	WARRANT CONTRACTOR	G Help Sign out
📌 SELF MANAGED	Robert Luca Donda				
*	Title A/Prof		~		
PERSON	Honorific				
Personal details	Given name				
Address details	Robert				
	Middle names Luca				
	Family name				
	Donda Preferred name				
	Gender				
	Unspecified		Female	$\checkmark$	Male
	Birth date	Deceas	ed date	Confide date	entiality agreement signed
	mm/dd/yyyy	mm/dd	/yyyy	mm/dd	/уууу
	Residential Status				
	Australian Citizen ORCID iD				~
	0000-0002-5915-6611				
Banking	IMPORT VIEW				

Figure 13 31 : Viewing a contact launches the REGIS Contact Relationship Management.

- 3. In edit mode, select the Edit option to change the person record attached to a contact type or to update funding information
- 4. Select the Delete option to remove the contact from the project
- 5. Select the Save option or navigate away from the screen to permanently save your changes

### 13.4.5 Decisions

Approval(s) assignment for an application can be done here.

- 1. Click Add Decisions and fill up/select the Approval Type, Entity, and User.
- 2. Click Save.

Classifications	Decisions 🚍 🕂	<ul> <li>Add Decisions</li> </ul>				
Clinical Trial - First Patient Enrolment						
Comments	Add New     Type				••• This field i	s required
Contacts	Entity	Project				
Decisions	User					
Groups		User		Assigned Date	Submitted Date	
History		✓ Save	X Cancel			
Issues	Found <b>0</b> items					
Regions	No approvals have	been assigned to this app	lication.			
Related documents						

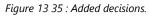
Figure 13 32 : Adding decisions.

		administrator
S	earch by a	pproval type
Se	arch	Q
Fou	und <b>7</b> approval types	
¥	Name	Amendment form
1413	Description	This approval is created at the HREC meeting to action a general amendment form.
	Applies To	Project
	Status	true
	Name	Amendment form with contact change for PI/CPI
	Description	This approval is created at the HREC meeting to action a request for change of PI/CPI.
	Applies To	Project
	Status	true
Ο	Name	Request for extension of ethics approval
	Description	Added during meeting for an Amendment form with request for Extension of HREC approval.
	Applies To	Project
	Status	true
		י×¢
	Figure 13	3 33 : Select decision type.



Figure 13 34 : Adding users.

Classifications	Decisions <b>=</b>					
Clinical Trial - First Patient Enrolment	Found <b>1</b> item					x
	Туре					
Comments	Amendment form	19/12/2017	No	۲	Ø	ŵ
Contacts						
Decisions						
-						



### 13.4.6 History

The Project History screen displays a list of activities related to this project similar to the information that appears in the system audit trail. Activity types may be status changed, activities relating to processing decision notification letters and project agreements.

Classifications	Hi	story				B
Clinical Trial - First Patient Enrolment	Fou	nd <b>15</b> items				x
Clinical trial patient enrolment		Date 🔺	User	Mimic user	Action	Record type
Comments	٠	18/12/2017 4:59:46 PM	josh.yip@f1solutions.com.au		Insert	Project Application
Contacts Decisions	•	18/12/2017 4:59:46 PM	josh.yip@f1solutions.com.au		Insert	Project Application Status History
Groups	•	18/12/2017 4:59:46 PM	josh.yip@f1solutions.com.au		Insert	Project Application Project Manager
History	,	18/12/2017 4:59:46 PM	josh.yip@f1solutions.com.au		Insert	Project Application User
Regions	,	18/12/2017 4:59:46 PM	josh.yip@f1solutions.com.au		Insert	Project Application Participant
Related documents	•	18/12/2017 4:59:46 PM	josh.yip@f1solutions.com.au		Insert	Project Application Contact
Status						

Figure 13 36 : The history screen.

### Tips:

- Click the heading e.g. Type or user, to sort by the column
- The audit trail includes more information on the activity including before and after values.

### **13.4.7** Issues

Project issues can be captured in the project viewer and reported on in the dashboard. You can create charts comparing the issue ratings, issue consequences and issue probabilities, or visually track the active issues per program.

Classifications	Issues 😑 🛨 Add issue
Clinical Trial - First Patient Enrolment	Found 0 items
Clinical trial patient enrolment	No issues have been assigned to this project.
Comments	
Contacts	
Decisions	
Groups	
History	
Issues	
Pagions	

Figure 13 37 : The Issues screen.

Classifications	lssues ≡			
Clinical Trial - First Patient Enrolment	+ Add issue			
Clinical trial patient enrolment Comments Contacts	Target date Actual date Title	31/12/2017 dd/mm/yyyy Hardware inefficiency		A
Decisions Groups History	Impact Category Description	High Other Hardware requires calibration		*
Issues Regions Related documents Status	Corrective action plan	Calibration to be executed no m	ore than 3 days. attending to calibration activities.	
Tasks Timeline	Active Escalated	Yes Yes Yes		

Figure 13 38 : The Issues data entry sample screen.

### Tips:

- Issues feed into the Traffic Light report to generate the colour coding
- Select the Edit or Delete options to modify a record
- Select the Save option or navigate away from the screen to permanently save your changes

### 13.4.8 Regions

The project region(s) can be added and updated. Regions can be reported on using the dashboard reporting.

Classifications	Regions	
Clinical Trial - First Patient Enrolment Clinical trial patient enrolment	▼ Filters Show all regions Yes Q Search	s 🗙 Reset
Comments Contacts	ACT	
Decisions	ACT	Canberra
Groups	NSW	
History	Border Rivers-Gwydir	Central West
Issues	Hawkesbury Napean	Hunter-Central Rivers
Regions Related documents	🔲 Lachlan	Lower Murray Darling
Status	Murray	Murrumbidgee
Tasks	🗖 Namoi	Northern Rivers
Timeline	O NSW	Southern Rivers

Figure 13 39 : The Regions screen.

### Tips:

- Select Edit (from the floating toolbar) before selecting additional regions
- Select the checkbox, Show all regions, to either display all regions (by state) or to display regions for specified states only
- You can select as many regions as required

Classifications	Regions	
Clinical Trial - First Patient Enrolment Clinical trial patient enrolment Comments	▼ Filters Show all regions Ver Q Search	¥ Reset
Contacts	ACT	
Decisions	🖌 ACT	🕼 Canberra
Groups	NSW	
History	Border Rivers-Gwydir	Central West
ssues	Hawkesbury Napean	Hunter-Central Rivers
Regions Related documents	🗋 Lachlan	Lower Murray Darling
Status	Murray	Murrumbidgee
Tasks	🗋 Namoi	Northern Rivers
Timeline	☑ NSW	Southern Rivers

Figure 13 40 : The selected regions.

- Deselect a state to remove the region from the project
- Select the Save option or navigate away from the screen to permanently save your changes

### **13.4.9 Related Documents**

Saving documents in a central, offsite location can assist with disaster recovery and communication within a team.

The related documents screen supports two view options. You may group your documents by type (aggregate view illustrated below) or list all documents (table view III).

Classifications	Related documents	=				
Clinical Trial - First Patient Enrolment	▼ Filters Search					
Clinical trial patient enrolment	External document types	Select Same Options				
Comments		Q Search X Reset				
Contacts	Found 1 item		R	٠	⊞ ∎	&
Decisions	🐑 Study Protocol				1	×
Groups						
History						
Issues						
Regions	a					
Related documents						
Status						
	Figure 13 41 : The R	Related Documents main screen.				
Classifications	Related documents	Bulk download (0 document(s) selected)				
Clinical Trial - First Patient Enrolment	▼ Filters Search	+ Add external document				
Clinical trial patient enrolment	External document types	Select Some Options				Ŧ
Comments		Q Search 🗶 Reset				
Contacts	Found 1 item		x	٠	⊞	æ
Decisions	😥 Study Protocol				1	×
Groups	L. Sector BC					

Figure 13 42 : Adding external document to the project.

### Tips:

- To add a document or bulk upload documents, select **Add external document** from the menu
  - Click or drag and drop your files on the drop zone
  - Select a document type and click Save

Classifications	Related documents $\equiv$		
Clinical Trial - First Patient	🕼 Add Relate	d documents	
Enrolment Clinical trial patient enrolment	Select documents	Click or drop your files here	
Comments		🖹 Save 🗶 Cancel	
Contacts	Found <b>1</b> item	2 🎙 🎟 🕹	
Decisions	🕡 Study Protocol	1 ×	

Figure 13 43 : Adding new external document to the project.

• Only certain document types may be edited. When editing a document, select the Replace file option to display the drop zone. Simply drag a new file to the drop zone and select Save to replace the file.

Classifications	Related doc	uments 🚍		
Clinical Trial - First Patient Enrolment	🕼 Add Relate	d documents		
Clinical trial patient enrolment	Select documents	✓ Selected	files: 1	×
Comments		uploaddoc.txt (0.62 KB)		
Contacts		uploaddoc.txt		
Decisions		Acquittal Report *		
Groups		🖺 Save 🗶 Cancel		
History	Found 1 item		<b>x •</b>	
Issues	🗑 Study Protocol		▲ ▼	1 28
Regions	- stady modeloi			

Figure 13 44 : Uploading new external document to the project.

- Some document types cannot be deleted
- Documents that can be deleted will have a delete icon
- Documents that can be edited will have an edit icon
- All documents can be downloaded and viewed
- Select the check boxes beside the documents to enable the Bulk download option. This command downloads the selected files in a zip file.
- In aggregate view, select the document type banner to expand the display. Note that you can select all documents of that type using the select all checkbox.

#### Related documents $\equiv$

<b>T</b> Fil Search	ters										
xterna	l document types	Select	Some Options								
		Q S	earch 🗙 Re	set							
ound 2	titems								x 🗣	▥	8
<b>e</b> /	cquittal Report									a	×
×	Title <b>^</b>	Filename	Size	External document type	Version	Tags	Date modified	Modified by	Relationship		
¥	■ Suploaddoc.t xt (Droft)	uploaddoc.bd	17.0 bytes	Acquittal Report	1		19/12/2017	F1 Solutions, A dministrator		۵	¥
<b>P</b> 3	tudy Protocol									1	8
Z	Title 🔨	Filename	Size	External document	type Version	Tags	Date modi	fied Modified	by Relationsh	iga -	
•	Manage_Review	vs. Manage_Re csv	views. 2.9 KB	Study Protocol	1		18/12/2017	Yip, Josh	t	1	±

Figure 13 45 : The uploaded documents in aggregate view.

- To view only documents of the document type (full screen), select the Expand button
- Select the Back button to return to the expanded view and select the document type title in brackets to return to aggregate view.

### 13.4.10 Status

The project status reflects the project stage - from the start to the completion of a project. Various functions can only be performed for projects that have a particular status and reports are often run by status.

Classifications	Status <b>≡</b>	<ul> <li>Add status</li> </ul>	ľ		
Clinical Trial - First Patient Enrolment	Found 1 item		• •		£
Clinical trial patient enrolment	Date 🛩	Status	User	Deto of enby	
	18/12/2017	Registered	Yīp, Josh	18/12/2017	Ô
Comments	Items per page 10	~			
Contacts					
Decisions					
Groups					
History					
Issues					
Regions					
Related documents					
Status					
Tasks					
Timeline					

Figure 13 46 : The uploaded documents in aggregate view.

Common status descriptions include the following:

Status	Remark
Active	All actively managed projects. Once a project agreement is signed the status is automatically changed to active.
Approved (EOI invited)	The application has been approved to move to the next stage (for a two application), or will be invited to negotiate a contract.
Unsuccessful	The application was unsuccessful and will not be granted funding
Pending eligibility assessment	Status given to an application that has been transferred but has not been checked for eligibility
Eligible	Awaiting assessment – passed the eligibility assessment
Ineligible	Failed the eligibility assessment
Terminated	Project terminated

Figure 13 47 : Common project status descriptions.

### Tips:

- While in edit mode, select the Add Status option and complete the form.
- Select the Edit or Delete options to modify a record
- Select the Save option or navigate away from the screen to permanently save your changes
- Some status descriptions can be modified by your system administrator.

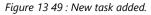
### 13.4.11 Tasks

Tasks are a helpful way of communicating and keeping track of project related tasks. You can allocate tasks to yourself or to another user. If you find it helpful, pin the task pane to keep it open.

Classifications	Tasks = + Add Task
Clinical Trial - First Patient Enrolment	Found 0 items
Clinical trial patient enrolment	• No tasks have been assigned to this project
Comments	
Contacts	
Decisions	
Groups	
History	
Issues	
Regions	
Related documents	
Status	
Tasks	

Figure 13 48 : The Add Task screen.

Classifications	Tasks <b>≡</b>										
Clinical Trial - First Patient Enrolment	Found 1 item										x
Clinical trial patient enrolment	Date due 👻										
Comments	31/12/2017		Yip, Josh	Medium	New task	Yes	F1 Solutions, Administrator	۲	Ø	Ø	Ŵ
Contacts	Items per pag	e 10 🗸									

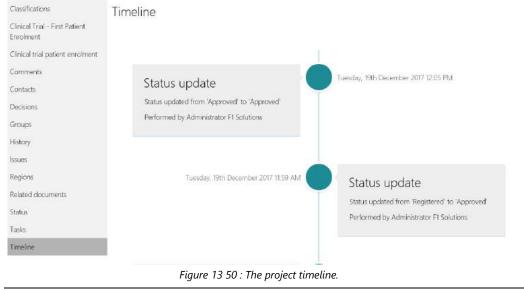


### Tips:

- Select Add Task and complete the form
- All tasks display in the project viewer tasks screen. Only tasks allocated to you display in the tasks pane.
- Select the Edit or Delete options to modify a record
- Select the Save option or navigate away from the screen to permanently save your changes

### 13.4.12 Timeline

The project timeline shows the status updates to a project from the first registered date until current.



End of section The Project Viewer

# 14 User Defined Dashboards & Reports

Users with the role **Dashboard edit** can create and update dashboards. Users with the role **Dashboard view** can view dashboard items shared with them. If you have either of these roles, you will see the Dashboard tile on the Start page.

### 14.1 Viewing a dashboard

To view a dashboard:

- Select the List option from the Dashboard menu The default dashboard (marked with a is displayed
- 2. Move your mouse over the dashboard tile
- 3. Select Preview ( 🥙 ).

The dashboard is displayed

### Note:

- To ensure the dashboard values are up to date, select Refresh ( 🐱 ).
- The dashboard with the green tick is your default dashboard. It will display automatically when you select Dashboards. To modify your default dashboard, select Default ( ✓ ).

State by Technology Counts the number of projects :

ogy and state by status

- You may be able to Drill Down to view the data in a different way. For example, you may be able to select a project series and drill down to view a representation of projects by status.
- To drill up, select the **Drill Up** (**\u00e5**) icon in the top right hand corner of the object.
- The **Export** ( ) icon will have different options depending on the object type. Charts can be exported to a PDF or an image and chart data can be exported to Excel. Grid data can also be exported to Excel.
- Click on the **Remove Filter** ( $\mathbf{T}_{\mathbf{k}}$ ) icon to remove data filters.

### 14.2 Adding a dashboard

Saving a dashboard to the server from the Dashboard Designer (refer to the Dashboard Designer Guide) automatically adds it to your dashboard list. To add a dashboard file (.xml) manually, follow the steps below:

- 1. Select the Add option from the dashboard menu
- 2. Complete the Add dashboard form

Start Search.			Q	?	administrator
G Manage dash	nboards <b>≡</b>				
Add dashboard					
Name				This fi	eld is required, 🕱
Description				This fi	eld is required. 🕱
Default	No				
Dashboard File (* xml)		Click or	drop your file here		
	🖹 Save  🗙 Car	vel			

3. Click OK

### Note:

- In the screenshot above, the default option is selected. Selecting default will automatically set this dashboard as your default dashboard.
- You may use an existing dashboard file saved previously or from another user. Just drop it into the Dashboard File box.

### 14.3 Deleting a dashboard

When you delete a dashboard it will only delete the dashboard from your list – anybody that you have shared the dashboard with, or shared the dashboard with you, will not be impacted. Anyone in possession of the .xml file used to create the Dashboard will still be able to open the file using the Dashboard Designer. To delete a dashboard:

- 1. Select the List option from the Dashboard Menu
- 2. Select the dashboard to delete
- 3. Select the **Delete** button
- 4. Select **Yes** to confirm

### 14.4 Editing a dashboard

To change the dashboard name, description or replace the .xml file for the dashboard:

- 1. View the dashboard
- 2. Select the **Edit** option from the menu
- 3. Enter a new name, description or default status
- 4. Select the Change Dashboard Design option (optional step)
- 5. Add the new .xml file to the upload file area
- 6. Click OK

### Note:

• You may choose the Download File option to save a local copy of the .xml file. You will then be able to open the .xml file in the Dashboard Designer to modify the content.

### 14.5 Share a dashboard

To make your dashboard available to another user to view, you can Share the dashboard.

- 1. Select List from the Dashboard menu
- 2. Click on the dashboard to share
- 3. Click the Share button
- 4. Click the **Add** button
- 5. Search for and select the user

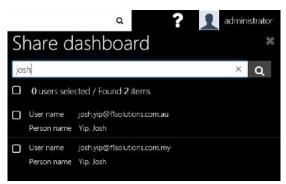


Figure 14 2 : Sharing dashboard with other users.

- 6. Repeat steps 4 and 5 as many times as desired
- 7. Click OK

### 14.6 Share a dashboard with an REGIS External Portal user

You can create and share a dashboard with a REGIS External Portal user. A Dashboard icon will automatically appear in the REGIS External Portal Menu to enable the user to navigate to view the dashboard data. This is a two-step process: 1) modify the user access; 2) share the dashboard.

To enable the user to view the dashboard they must have the **Net dashboard view** role. Refer to User Management for more information.

	Resear	ch Ethics Gover	nance 🗖		
	Inform	ation System			
		Name 🔿	Description		
			Provides access to the		
			main functionality exposed through the		
Research Ethics Governance		General access	Research Ethics		
			Governance Information System		
System	S	Net admin	Provides administrator specific access to Research Ethics: Governance Information System Auroconality		
	3	Net dashboard view	Allows user to view assigned dashboards		
	S	Net help edit	Allows user to edit help text		
	8	Person edit	Allows user to edit details of their own Person record		
	8	Person view	Allows user to view details of their own		

Figure 14 3: The REGIS External Portal dashboard view access rights.

To share a dashboard with an OminNet user follow the steps in Share a dashboard. The Dashboard icon appears in the REGIS External Portal menu.



#### Tips:

• If an REGIS External Portal user has a single dashboard it will automatically appear.

• If an REGIS External Portal user has more than one dashboard available to them, they can select them from the left navigation menu.

Dashboards
REGIS Metrics
REGIS Metrics (Clock)
Figure 14 2: The Dashboard options.

### 14.7 Export a dashboard

You can print or export a dashboard in a variety of formats. Click on the Export button to view the list.

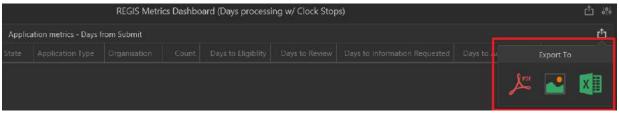


Figure 14 3: Exporting a dashboard.

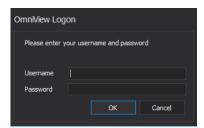
Tip:

- Each object on a dashboard can be exported individually
- Use the export button in the top right hand corner to export all objects on the dashboard

### 14.8 Download the Dashboard Designer

The Dashboard Designer is used to create custom dashboards. Select **Download designer** from the menu to begin the process of downloading and installing the Dashboard Designer. Once the Dashboard Designer has been installed you can run it at any time using the shortcut on your desktop.

1. Select REGIS Internal Portal Dashboard Designer from the Start menu



*Figure 14 4: The login credentials for Dashboard/Report Designer.* 

- 2. Enter your username
- 3. Enter your password
- 4. Click OK
- 5. You should then see the window below

	- v4 <b>- D ×</b>
Select the reporting tool you	u would like to use:
Report designer	Dashboard designer
Download reporting data	a,

Figure 14 5: Choose Dashboard Designer.

6. Double click Dashboard Designer.

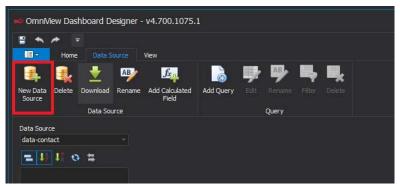


Figure 14 6: Add New Data Source.

### To create a data source:

- 7. From the Ribbon, click Data Source
- 8. Click Download
- 9. The Download window is displayed

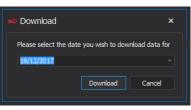


Figure 14 7: Select date for data download.

- 10. Select the day for which you wish to download data. This will download a snapshot of data as at the selected date.
- 11. Click **Download**
- 12. The data for the selected day will be downloaded and you will see the following window.



Figure 14 8: Data download progress.

13. Once the download has been completed the window above will be closed and you will be ready to create and update dashboards.

### Note:

• The day will be defaulted to the current date. It is suggested that the data is downloaded each time you logon to the **Dashboard Designer** so the most recent version of the data is available for you to build dashboards against.

### 14.8.1 Creating a data source

You can begin adding items (charts/grids) to the blank canvas (illustrated above) but no data will display until you:

- Download data. This downloads data to your computer to assist you to design your dashboard. You can do this whenever you like to ensure you are working with the most recent data in the Dashboard Designer. Note: When viewing a dashboard in REGIS Internal Portal you simply click the Refresh button to ensure you are looking at the most recent data.
- 2. Create a data source to link your new dashboard with the relevant datasets.
- 3. Add elements (fields) to the DATA ITEMS area

#### To download data:

- 1. Select the Data Source tab on the Ribbon
- 2. Click Download
- 3. The Download window is displayed

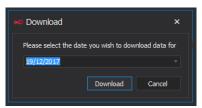


Figure 14 9: Data download selection by date.

4. Select the day for which you wish to download data

**Note**: This will download a snapshot of data for seven days up to and including the date you selected.

- 5. Click Download
- 6. The data for the selected day will be downloaded and you will see the following window



Figure 14 10: Data download.

7. Once the download has been completed the window above will be closed and you will be ready to create and update dashboards

#### Note:

• The day will be defaulted to the current date. It is suggested that the data is downloaded each time you logon to the **Dashboard Designer** so that the most recent version of the data is available for you to build dashboards against.

### Create a new Data Source

A Data Source specifies the datasets (e.g. Projects, Contacts) you are interested in.

- 1. Select the Data Source tab and click the New Data Source button
- 2. Name your data source appropriately

Note: This name will be for your own reference only, and will not be visible in the Dashboard that you create.

New Datasource Name	
Please enter the new datasource name	
	Ok Cancel

Figure 14 11: Key in the new datasource name.

3. The Query Designer is displayed. The Items column lists all the available datasets. Each dataset includes a collection of relevant fields.

teris	Name	Jain	Relation Condition		
Application	- Inded			from "Project" "Project"	
	Project Id				
	Date Recorded				
	Protect Identifie				
	Tide				
	Program				
	Status Code				
	Status Descripto	n.			
Rast Decision Notification	Start Date				
	Start Date Finan	col Year			
	End Date				
	End Date Finand	ai Year			
	Primary Organisa	rbon 3d			
Project Agreement Project Classification	Primar y Organia	dion Name			
Project Contact	Received Date				
Project Contingency	Received Date #	nancial Year			
Noject Eligibéty					
Project Funding	Column Name	Alas	Table		
Project Iosue Project Nikolone					
Project Organisation					
Project Region					
Project Reporting Group					
Project Risk					
Project Status History Project Task					
Project Technology					

4. Select an Item and drag it to the Name section

Figure 14 12: The query designer.

**Note**: The system automatically disables any items in the left hand panel that cannot be easily joined to the selected item. If you need to join a greyed out item, drag the table to the middle section and manually complete the Condition Editor form.

5. If required, select additional items (datasets) and drag them to the Name section *The system automatically displays the Condition Editor* 

ttens Appkaton Application Carlant Application Eligibility Application Cognisation Application Cognisation Application Region Application Region	Name Project Project Id Date Recorded Project IdInstitution Project IdInstitution Project Identifier Table	Join/Relation Condition	select 1 from "Project" "Project"	Alow SQL Editi
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Project Contingency				
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Project Milestone				
Project Organisation				
Project Region				
Project Reporting Group				
Project Risk				
Project Status History				
Project Task				
Project Technology				

Figure 14 13: The condition editor.

### 6. Important! Select the Left out join option

**Note:** these conditions can be modified if required; however this should only be done if you are confident you understand why and how they need to change. Refer to the notes at the end of this Quick Reference Guide for more information.

- 7. Click **OK**
- 8. Select the columns for use in the dashboard by checking the boxes beside them

Note: You can select all checkboxes by selecting the one beside the label of the Item (in the above image, this is the highlighted Row, labelled Project in the illustration to the right).

ry Designer				
				Allow SQL Edit
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	✓ Project Id			"Project"."Program" as "Program", "Project"."S "Project"."StatusDescription" as "Status Descr
	✓ Date Recorded			"Project"."StartDateFinancialYear" as "Start D
				"Project"."EndDateFinancialYear" as "End Date
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	✓ Title			"Project". "ReceivedDate" as "Received Date", "
	✓ Program			as "Received Date Financial Year", "Project".". "Project"."ApprovedDateFinancialYear" as "Appr.
	✓ Status Code			as "Is Active", "Project", "ApplicationID" as "
	✓ Status Description			as "Application Type", "Project". "ApplicationS
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Past Decision Notification	Start Date			"Project"."CommercialReadinessIndex" as "Comme
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Project Technology	StatusCode	Status Code	Project	"Project Contact", "Froject Contact", "MobileNd "Project Contact", "EmailAddress" as "Email Add
Unit	StatusDescription	Status Description	Project	

Figure 14 14: The condition editor.

The Query Designer is updated with your selections

9. Important! Click Filter...

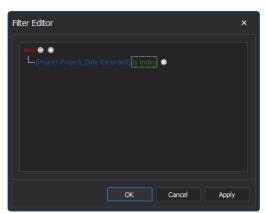


Figure 14 15: The Filter Editor is displayed

10. Add a filter (if required) noting that filters can be added and removed in the Dashboard Designer

Note: Almost always you will want to add a filter that only looks at data that has a Date Recorded that *Is today*. Select the Preview Results button (bottom right hand corner) to preview the data you will be working with.

11. Click OK

The System displays the Maintain Dashboard Screen

### 14.8.2 Design your dashboard

You are now ready to begin designing your dashboard report by adding data elements to the DATA ITEMS area.

- 1. From the Home tab of the ribbon, select a data visualisation element such as a Pivot table, Grid or Chart to add it to the canvas. You can size and move these around later.
- 2. Select a data element (field) from the far left panel to the DATA ITEMS panel.
- 3. Drop the data item on a box in the DATA ITEMS panel. Note that for a Pivot table, adding the Project Title to the *Columns* area will display it across the page, adding Project Title to the *Rows* area will display it down the page and adding it to the *Values* area will count the number of records.

The Grid will update as data elements are added.

- 4. Use the tools on the Data tab to add filters and drill-down capability. These tools are explained in more detail later in this Quick Reference Guide
- 5. Select a format from the **Design** tab

### 14.8.3 Save the dashboard

You can save the dashboard locally (using the options in the File group) or save and upload to the server (using the options in the Server group). Save to the server when you are ready to view the dashboard in REGIS Internal Portal.

- 1. Select the **Home** tab
- 2. Select **Save** or **Save As** (Server)

3. If the dashboard has not been saved previously or the **Save As** button is clicked the following window will be displayed:

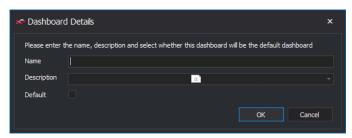


Figure 14 16: Keying in the dashboard details.

- 4. Enter the relevant details in the **Dashboard Details** window
- 5. Click OK

#### 14.8.4 Create a new dashboard

- 1. Select the Home tab on the Ribbon
- 2. Click New

New Pivot Grid Chart Pies Gauges Cards Choropleth Range Map Filter Geo Point Maps - B Scatter Chart Dashbo Insert			Da	ata Source	View									
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	)ata Source testbyjosh											Dash	board	

Figure 14 17: Creating a new dashboard.

3. You will now need to configure a new Data Source

### 14.8.5 Load dashboard

- 1. Select the Home tab
- 2. Select Open from the Server area

Note: Dashboards saved to the server can be viewed from within REGIS Internal Portal. Dashboards saved locally (using the Save option in the File group) can only be viewed from within the Dashboard Designer.

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Dashbo	1	Server			File		Hist	tory	
Data Source									
testbyjosh									

Figure 14 18: Opening an existing dashboard.

3. The Dashboards window will be displayed listing all dashboards that you have access to open from the server

🁐 D	ashboards		-		×
Plea	ase select a dashoard from th	e list below to view and edit	it		
	Name	Description	Default		
	Commitments by Month	Commitments by Month			
	Project Issues Dashboard	Various charts displayin			
۱.	Project Issues Details	Lists the details of Proje			
	Milestone Overview	Milestone Overview			
	Team Management	Details on individual wor			
	Projects - UNSW, CSIR	Statistics on projects for			
	Milestones Overdue & KPIs	Statistics on overdue mil	$\checkmark$		
	Monthly Estimate	Details of company's mo			
	Project Funding Breakdo	Breakdown of funding b			
	Dashboard Training 1	Dashboard Training 1			
	Application & Project Co	Lists contact information			
	Milestone Details	Listing some details of al			
	Dashboard Training 1	Dashboard Training 1			
	Administered Payments	Rased on Dashboard Tr			
			OK	Cancel	

Figure 14 19: The available dashboards.

4. Select the dashboard you would like to open and click **OK** 

### 14.8.6 Logoff the Dashboard Designer

- 1. Click the X in the top right hand corner of the **Dashboard Designer**.
- 14.8.7 Using the Dashboard designer Dashboard Editor

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Figure 14 20: The dashboard editor

**Dashboard Data Sources** and **Element Data**– This displays all the available Dashboard datasets (click on the down arrow to view the list) and associated element data (these were selected when the Dashboard Data Source was created).

**Dashboard Ribbon** – This displays all the functions available for use including visualisation elements, layout options and drill down/filtering options.

Dashboard Canvas – This area displays all of the Dashboard Elements for the selected Dashboard.

A **Dashboard Element** is a Grid, Chart, Graph, etc. These can be customised, resized and positioned as required using drag and drop functionality. A full list of **Dashboard Elements** can be seen in the table below.

The **Dashboard Ribbon** has 13 different data visualisation elements each with different strengths and options. These can be accessed from the Dashboard Ribbon.

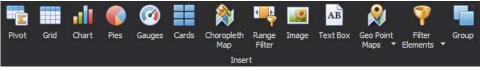


Figure 14 21: The dashboard ribbon.

Pivot	The pivot dashboard element enables a cross-sectional view of data pivoted across multiple dimensions.
Grid	The grid enables a standard tabular representation of data. This dashboard element also contains embedded visual cues and displays that assist in quickly understanding data.
Chart	This quintessential visualisation tool assists in the creation of bar, point, line, area, range, bubble, and financial charts. The creation mechanism has also been significantly streamlined in order to visualize your data with simple drop actions.
Pies	The pie chart is a powerful visualisation tool that enables users to understand distributions over small ranges.
Gauges	Gauges allow the comparative visualisation of two values where one represents a target and the other an actual value. This dashboard element also allows for a multiplicity of gauges in a single dashboard element by creating a series view of the same.
Cards	Cards, similar to gauges, are a textual visualisation of target to actual values. These additionally include easy to understand positive/negative visualisations as well as easy to consume data explanations.
Choropleth Map	The choropleth map provides an easy way to visualize how a measurement varies across a geographic area or it shows the level of variability within a region.
Geo Point Map	The Geo Point Map dashboard item allows you to place callouts on the map using geographical coordinates.

Range Filter	The range filter is also a brand new visualisation tool that allows for automatic data filtering by presenting a chart based range. The range filter is automatically wired up to be a master filter and enables users to drill down into specific data effortlessly.								
Image	Creates an image dashboard element for display in the dashboard. Select the Load Image option from the Design tab to select the image file. Format the image using the format options on the Design tab.								
	Show Caption       Aby       Image       Image								
Text box	Creates a text box item. Double click in the text box item to enter text. All the normal formatting options are included.								
	Edit Text C × ToolBars Calibri 11								
Filter	Filter elements are used to apply filtering to other dashboard items. The combo								
Elements	box allows the user to select a value from the dropdown list. The List box allows a user to select multiple values from a list of items. The tree view items displays values in a hierarchical way and allows you to expand and collapse nodes.								
Group	The group element allows you to keep two or more existing dashboard elements together by dropping them into the Group box.								
	Table 14.1: The databased ribbon many								

Table 14 1: The dashboard ribbon menu.

A data element (field) can be dragged from a **Dashboard Source** to the **Data Items** area. The available areas will change depending on whether are working with a Pivot Table, Grid, Chart, etc.

Some of the areas where these can be dragged are:

- 1. Values the Y axis in the case of a chart (or the values of the items being measured)
- 2. **Columns** data is listed across the page
- 3. **Rows** data is listed down the page
- 4. Arguments this can be considered as the X axis (or the items being measured)
- 5. Series different sets of (X, Y) pairs

Additionally, drag data elements directly into the **Hidden Data Items** section to do additional sorting, filtering, and data shaping on values and arguments that are not necessarily visible in the actual **Dashboard**. You will be able to shape data as you see fit – even with data elements not present in the visualisation.

**Note:** Depending on the **field** type e.g. Text, Money, etc. and the **Dashboard Element** type e.g. Chart, Grid, the options available in the **Data Items** area will change. For example, with a Card or Grid, you will be able to select how the data is aggregated (sum, count, average) and configure targets, warnings and positive/negative indicators. For a Chart you will be able to select different types of charts for each field.

### 14.8.8 Dashboard Layout

Each **Dashboard Element** has item specific layout capabilities. These capabilities allow for the look and feel of the **Dashboard Element** to be customised. A few examples are below:

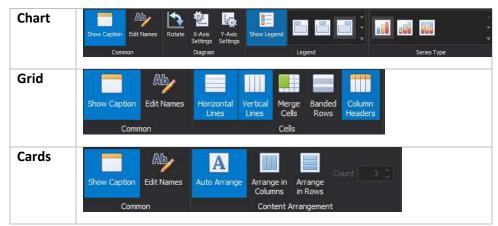


Table 14 2: The dashboard layout styles.

These layout options are element specific and allow for flexibility and personalisation of your **Dashboards**.

**Dashboard Elements** can also have the labels, headings and other aspects further customised. To modify names:

- 1. Select the **Dashboard Element**, e.g. a chart
- 2. Select the Design Ribbon Menu
- 3. Select the Edit Names option

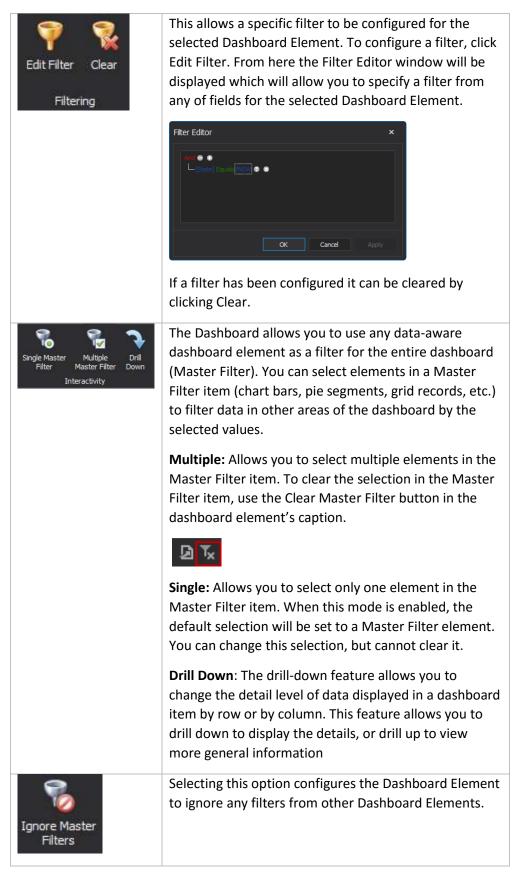
### 14.8.9 Interactivity

Every **Dashboard Element** visualisation is linked to a specific set of data (data source). Because of this data connection, Dashboard wide filtering as well as simple element drill down can be configured.

Filtering and drill down functionality is available from the **Data** Menu Ribbon (see below). Each **Dashboard Element** has this functionality.



The **Data** Menu Ribbon allows you to define a **Dashboard** wide filter, drill down, as well as the ability to define whether or not a dashboard element even participates in a filter.



Cross-Data-Source Filtering	Selecting this option allows for the Dashboard Element to filter other Dashboard Elements automatically even if the data source for the other Dashboard Elements is different to the data source of the selected Dashboard Element. Note that the Dashboard Elements must share a commonly named data element.
Initial State - Expand Column Groups Expand Row Groups	Specify the initial state of expand and collapse groups for a pivot item.
Arguments Series	<b>Filtering by Arguments</b> : When filtering by arguments is enabled, you can click series points to make other dashboard items display only data related to selected argument values.
Target dimensions	<b>Filtering by Series</b> : When filtering by series is enabled, you can click a series point to make other dashboard items display only data related to the selected series.

Table 14 3: The dashboard data filtering.

### **14.8.10 Extra information:**

**Joining data**: There may be reasons why you want to join data tables using an Inner Join. If you need to only return records when there are rows in both tables (e.g. you might only want Projects which have Milestones) using an Inner Join can be the perfect solution. Using an Outer Join would return all projects – whether they have milestones or not. We recommend using an Outer Join and filtering out unwanted records manually, unless you are sure you understand the difference and are prepared to risk 'losing' records.

**Multiple data sources:** You can create multiple data sources for a dashboard. Each element (pivot, grid, chart) can be linked to either a common or a different data source. When multiple data sources are in use, you can use the Cross-Data-Source Filtering to applying filtering across data sources.

### 14.8.11 Custom maps

### **Before you Begin**

The Dashboard/Report Designer comes equipped with a host of regional maps, however you may want to use one that you have sourced yourself. This process is supported, so long as the map you wish to use is an **ESRI SHP** file (include these acronyms when searching for a map to use). An example of such a map can be found here:

http://data.daff.gov.au/data/warehouse/nsaasr9nnd 022/nsaasr9nnd 02211a04es geo .zip

The above links to a Zip file, containing a set of files which, together, comprise a map of Australia. Before following the below instructions, you should save a map (whether the one linked above or one of your own selection) to a location on your local computer that you can navigate back to when the time comes. Note: Once a map has been saved into a Dashboard, the source Map file is no longer needed for that Dashboard to run and display the custom map correctly.

### **Getting Started**

- 1. Open **Dashboard/Report Designer**
- 2. Click the **Data Source** tab in the Ribbon
- 3. Select **Download**
- 4. Enter **Username**
- 5. Enter **Password**
- 6. Select From Date
- 7. Select To Date
- 8. Check Delete existing data

Allow the Download process to complete. You will be notified once this is done.

#### Adding an Address Data Source

- 1. From the Ribbon, select New Data Source
- 2. Name your Data Source
- 3. Select OK
- 4. Select the Address item from the list by double-clicking it
- 5. In the upper central pane, check the box beside Address to select all data items for use
- 6. Click the Filter button at the bottom left of the window
- 7. Click the 🗏 icon to add a new Filter
- 8. Click on the blue text in the new Filter and select Date Recorded from the menu that appears
- 9. Click on the green text in the new Filter and select Is Today
- 10. Select **OK**
- 11. Select OK

### Adding a Map Element

- 1. Click the **Home** tab in the Ribbon
- 2. Select Geo Point Map

#### **Customising the Map**

- 1. Click the **Design** tab in the Ribbon
- 2. Navigate to the location containing the **Custom Map**
- 3. Select the **.SHP** file
- 4. Select Open

### Adding Data to your Map

- 1. Drag the Latitude item into the DATA ITEMS pane labelled Latitude
- 2. Drag the Longitude item into the DATA ITEMS pane labelled Longitude
- 3. Drag the Address Id item into the DATA ITEMS pane labelled Value

### **Relabelling Fields for Presentation**

- 1. Mouse-over, then drop-down the Address Id you just placed under DATA ITEMS
- 2. Select **Count** from the available menu
- 3. Mouse-over, then drop-down the Address Id you just placed under DATA ITEMS
- 4. Select Rename from the available menu
- 5. Replace all text in the **Rename Data Item** window with the word **Count**

#### Adding a "Full Address" Custom Field

- 1. Right-Click on the word **Address** in the far left pane
- 2. Select Add Calculated Field
- 3. Enter the below into the Expression Editor, being careful to ensure that all single quotes, plus symbols and line breaks appear exactly where shown

[Address Line] + '

- ' + [Suburb] + ' ' + [State] + '
- ' + [Country] + ' ' + [Post Code]
- 4. Select OK
- 5. Right-Click on the Calculated Field 1 item in the far left pane
- 6. Select Rename
- 7. Change the text entered to the word Address
- 8. Drag this renamed item into the TOOLTIP DATA ITEMS pane labelled Dimensions

When you now hover your mouse over any flag shown on the map, the full address will appear.

#### Saving your New Report

- 1. Click the **Home** tab in the Ribbon
- 2. Click Save As
- 3. Navigate to a **location** for your Dashboard to be saved
- 4. Enter a File name for your Dashboard
- 5. Select Save

Your new Map Dashboard is now ready to be imported into REGIS Internal Portal!

End of section User Defined Dashboards & Reports

# 15 System Settings

The System Settings menus are grouped by function. For example, lookup lists associated with Project management are grouped under the Project Lookups menu. To prevent an item from appearing in a lookup list, you may change the status to 'Inactive'.

Users with role System **View** may view the lookup lists filtering by status. Users with role System **Edit** may add and maintain lookup list items.

If you have been allocated these system roles, you will be provided with additional guidance related to those functions.

End of section System Settings

# 16 Workflows

The Workflow Designer provides a method of configuring the behaviour of REGIS Internal Portal as processes are triggered by a user or system action. This end result may be a message, a task, or that the property of an object is updated. For example, workflows are used to manage the Merit Assessment process and Conflict of Interest processes. The use of workflows to manage these activities allows each organisation to easily adapt the process to suit their organisational processes.

At the current time, changes to Workflows are managed by System Administration Users and apply REGIS-wide. If you have been allocated a System Admin roles you will be provided with additional guidance related to this function.