



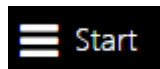
Guidance for Research Office: Application Search

The Application search is a function available in REGIS which allows you to search for applications using basic or advanced options.

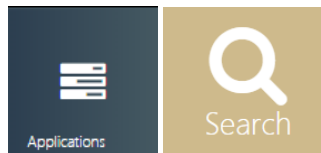
An application in REGIS is directly related to the pre-approval / authorisation process.

Navigating to Application Search

From the Start hamburger icon



Select Applications tile (dark grey) and then select Search

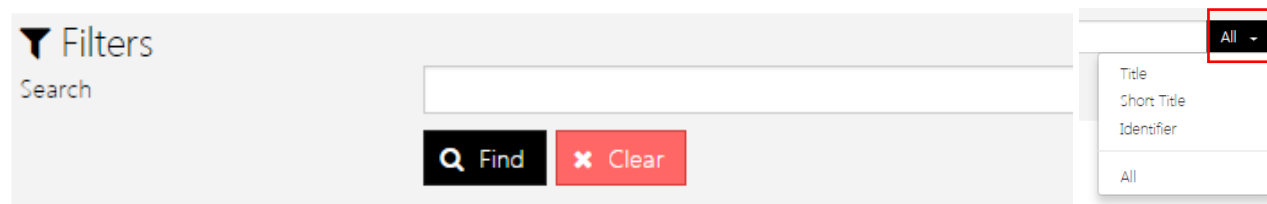


Creating an Application Search

The application search option has 1 keyword/general filter and 12 advanced filters.

General Search Filter

The general search filter is always displaying in the search wizard and searches the Title, Short Title and Identifier of an application. The cell defaults to 'All' but you can specify one of the criteria by clicking the downward facing arrow at the right-hand side of the search cell.


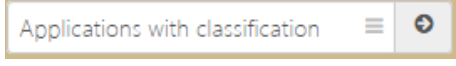


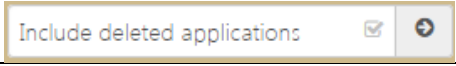







Advanced Search Filters

There are 12 advanced filters available on the left-hand side of the screen that can be added to the search criteria. Add a filter by clicking on the right facing arrow and it will appear in the search bar.

The filters will appear below the 'Find' and 'Clear' button in the search wizard.

<input type="text" value="Application organisation"/>	<p>The application organisation relates to each Organisation detailed within an application. Organisations are viewed in the Details Tab → Organisations in the application. They can be the HREA, Lead HREC, Sponsor and Site</p>
<input type="text" value="Application Owner"/>	<p>The application owner is always the CPI for the HREA or the PI for the SSA. Type in the owner's username (email address) to filter applications only associated with the application owner.</p>

	<p>The application status is the status of the application depending on its progress. By searching the status of 'In Progress' you can see all the applications that are currently in the status of 'In Progress'.</p> <p>You can order the outcome of the search by clicking the submit column heading. If the value of the submit column is blank this indicates that the application has never been submitted to the Research Office</p>
	<p>A classification corresponds to answers provided to an application during the completion of the form.</p> <p>Category of Research, Clinical Trial Agreement, Clinical Trial Phase, Clinical Trial Type, CTN / CTX, Ethics Pathway, NMA, Prior Ethics Outcomes, Risk Category, Sponsor Type, Study Type.</p>
	<p>Pending, Approval Pending, Eligible, Ineligible</p>
	<p>Note: This currently has no options to select.</p>
	<p>Yes/No toggle switch.</p>
	<p>Project Registration, Ethics, Site</p>
	<p>Sliding scale</p>
	<p>Select dd/mm/yy to dd/mm/yy</p>
	<p>Select the dropdown or start typing in a specific tag</p>
	<p>Sliding scale</p>

Using a Search in place of a Homepage Tile

Searching applications that are 'In Progress'

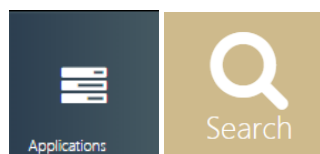
Ethics and Governance Applications

'In Progress' represents a status of an application. A status is automatically allocated to an application by REGIS depending on the actions that have happened against an application. If an application is 'In Progress' it means that the application is editable by the application owner and anyone else granted edit access.

An application would be 'In Progress' if:

- it is yet to be submitted to a Research Office
- a new version of the application has been created by the application owner
- an application has been reviewed and with 'Decision pending further information' applied

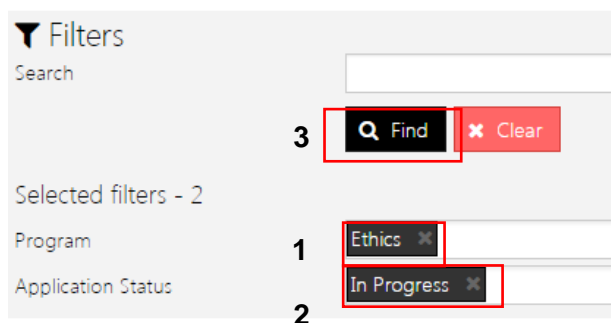
From the Start menu, select the Applications tile (dark grey) and then select Search



Add the Program and Application Status filters to the search wizard by clicking the right facing arrows. For program, click on the search cell and three options will drop down. Select from Ethics, Site and Project Registration. You can select multiple options.

For Application Status, click on the search cell and all options will appear. Start typing the specific status you are looking for and it will reduce the options available in the list.

Now click find.



A full list of all applications that are In Progress will appear.

You are able to order the search list by clicking on the submit column heading to see how many times an application has been submitted to the research office.

For HREA: A blank value in submit indicates the applications that have not been submitted to the Research Office. A 1 or more would indicate a HREA has either had an eligibility completed (ineligible) or an information request (decision pending).

For SSA: A blank in submit indicates the applications have not been submitted to the Heads of Department. A 1 would indicate all Head of Department decisions have been made and the application is yet to be submitted to the Research Office. A 2 or more would indicate the SSA has either had an eligibility completed (ineligible) or an information request.

<input type="checkbox"/>	Identifier	Title	Submit	Current ^	Stage	Status
<input type="checkbox"/>	2018/PID00002 ↑2018/ETH00002	A single centre study about aortic - HREA		1	Ethics	In Progress
<input type="checkbox"/>	2018/PID00009 ↑2018/ETH00009	A study with an ACT site please - HREA		1	Ethics	In Progress
<input type="checkbox"/>	2018/PID00003 ↑2018/ETH00010	kylie - Copy of 2018/ETH00003		1	Ethics	In Progress
<input type="checkbox"/>	2018/PID00011 ↑2018/ETH00013	Shishir test project 3105 - HREA		1	Ethics	In Progress

Using a Search to batch workflow

Using the application classification filter combined with the status filter allows you to see a similar group of applications that you may wish to work on.

Searching Commercially Sponsored applications that are 'Submitted'

For example an RGO may seek out any commercially sponsored applications that are in the status of submitted. Or an EO may use this function to filter by submission closing date.

From the Start menu select Applications tile (dark grey) and then select Search



Add the Program, Application Status and Applications with classifications filters to the search wizard by clicking the right facing arrows.

Add the additional search criteria into the filters.

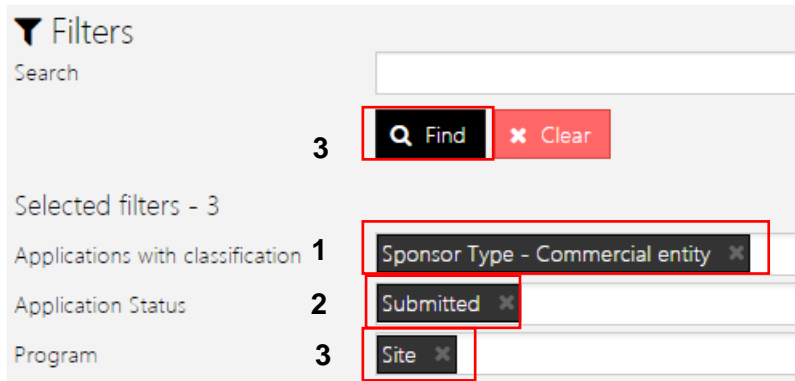
For Program, click on the search cell and three options will drop down, select Site.

For Application Status, click on the search cell and all options will appear. Start typing the specific status you are looking for and it will reduce the options available in the list.

For Application with classification, click on the search cell and all options will appear. Start typing the classification type you are looking for.

Now click find.

Applications ≡

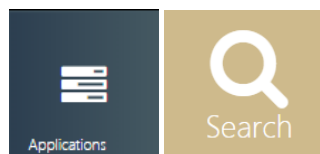


You can order the search list by clicking on the column headers along the top of the search.

Using the Search function to produce a Basic Report

Search all applications with a specific CPI/PI.

From the Start menu, select Applications tile (dark grey) and then select Search



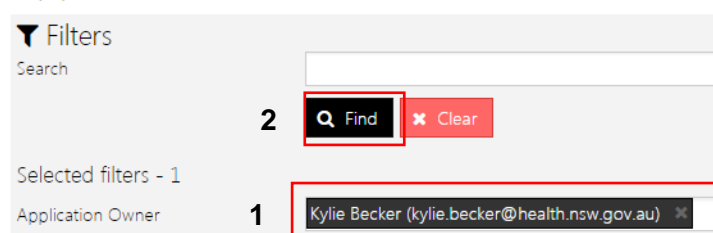
Add the Application owner filter to the search wizard by clicking the right facing arrows.

Add the additional search criteria into the filter.

For Application owner, click on the search cell and all options will appear. Start typing the username (email) or the application owner.

Now click find.

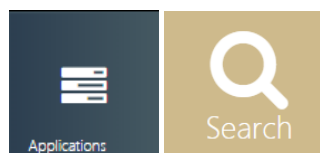
Applications ≡



You can order the search list by clicking on the column headers along the top of the search.

Search all applications in Oncology and Carcinogenesis.

From the Start menu, select Applications tile (dark grey) and then select Search



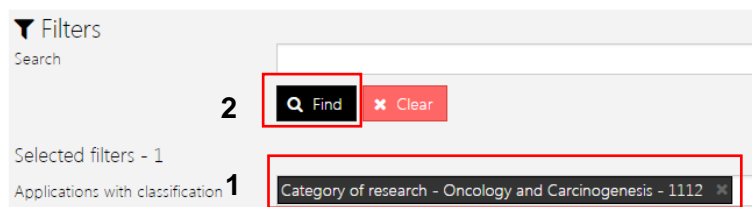
Add the Applications with classification filter to the search wizard by clicking the right facing arrows.

Add the additional search criteria into the filter.

For Applications with classification filter, click on the search cell and all options will appear. Start typing the classification type.

Now click find.

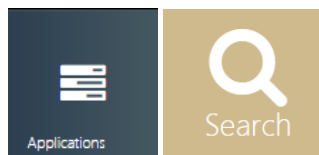
Applications ≡



You can order the search list by clicking on the column headers along the top of the search.

Search all LNR's submitted in a time frame.

From the Start menu, select Applications tile (dark grey) and then select Search



Add the Applications with classification filter and the Submitted date classification to the search wizard by clicking the right facing arrows.

Add the additional search criteria into the filter.

For Application with classification filter, click on the search cell and all options will appear. Start typing the classification type.

For Submitted date, add the date range dd/mm/yyyy to dd/mm/yyyy

Now click find.

Applications ≡

A screenshot of a search filter interface. At the top, there is a search bar with a magnifying glass icon and a 'Find' button. Below the search bar, there are two filter categories: 'Applications with classification' and 'Submitted date'. The 'Applications with classification' filter has a dropdown menu with 'Ethics pathway - Expedited' selected. The 'Submitted date' filter has two date input fields: '01/06/2018' and '30/06/2018'. Red boxes highlight the 'Find' button, the 'Ethics pathway - Expedited' dropdown, and the date range inputs.

You can order the search list by clicking on the column headers along the top of the search.

Export a search to .CSV file

All search outcomes can be exported to an excel (.csv) format.

Above the search results, to the right, will be a small export icon



Click on this icon and a temporary file will download to your computer. The .csv file will have the same columns that appear in the table view in REGIS.