



QUICK REFERENCE GUIDE

FOR RESEARCH OFFICES

Starting in REGIS

The Research Ethics and Governance Information System (REGIS) is the platform to manage ethics and site governance in NSW and ACT Public Health Organisations (PHOs).

REGIS has two portals – external and internal.

The **internal** portal is used by Research Office users working for NSW and ACT public health organisations. This portal is used to manage the research governance process for all human research projects.

All other users will access REGIS through the external portal.

The first time you log into REGIS, your home page will be blank and in the 'Classic View' style. Setting up your home page will significantly help you manage your tasks and workflows in REGIS.

Other tasks that may need to be completed include:

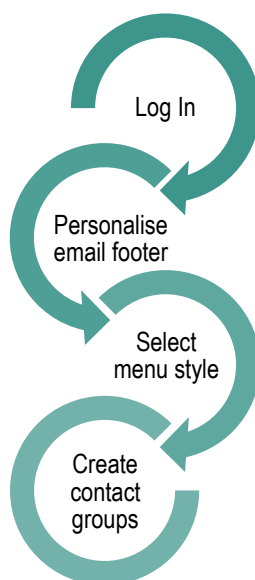
- ❖ Customising your REGIS email footer
- ❖ Select your menu style

What information is needed?

You should have the following information ready to get started in REGIS:

- ❖ Your user name and password
- ❖ Details to add to your REGIS email footer



How does it work in REGIS?



Selecting the menu style

Note: When logging in for the first time your homepage will appear in the 'Classic View' style.


Step 1

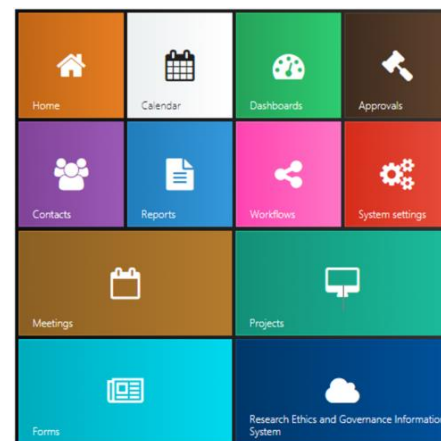
Select  and then select  which appears at the end of the menu.

Step 2

You can select to see your menu as 'Classic' or 'Vertical'. This is personal preference.

Classic View

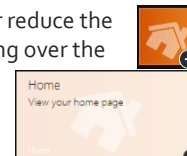
When you select the  icon the menu appears. Based off your permissions you will see all or some of the below icons.



You are able to move each tile in the panel by dragging to your desired location.



You are able to expand or reduce the size of the icon by hovering over the bottom right hand corner of the icon and clicking the arrow.



Vertical View



The menu is seen as a docked on the left hand side of the page. It uses the same icons as 'Classic View' and remains on the page even when navigating through the system. You cannot reorganise the order or size of this view.

**New functionality: If you hover over the icon the name will appear. If you click the icon then the other menu options appear.*

REGIS email footer.

A number of the system generated emails within REGIS have been designed to display the email footer of the user creating the action. To create your own email footer:

Step 1

When in 'Classic View' click and select 'Settings'

When in 'Vertical View' select the settings wheel icon from the top right corner of your homepage.

**Step 2**

Select **Email footer**

Step 3

Add the text of your personalised email footer. This may be the same as your Outlook or other work email footer.

Step 4

You may choose to include your Institutions logo in your email footer.

The logo must first be saved as an image file on your computer.

Step 5

Use the formatting tools in the top bar of the email footer wizard to create the desired visual outcome.

Hover over the icon to reveal the tooltip, click to select.

B *I* U **Bold, *Italic*, Underlined**

Colour (text and background), Paragraph format (headings)

Aligned, Ordered List (numbered), Unordered List (dot points)

Increase Indent, Decrease Indent

Insert Image, Insert Link

Undo, Redo

Step 6

Select **Save**

Setting up contact groups in REGIS

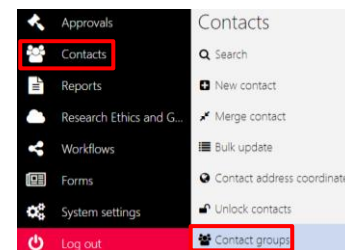
A contact group can be useful when the same group of people (HREC members) are invited to a number of meetings or asked to complete reviews.

Step 1

In 'Classic View' click and select 'Contacts' and then 'Contact groups'



In 'Vertical View' click 'Contacts' and then select 'Contact groups'

**Step 2**

Select '+ Add group' **+ Add group**

Step 4

The '+ Add group' wizard will appear.

Group name: Enter the name of the group. The group name will be what appears when searching for contacts.

Note: This should be specific as groups, like all contacts, are viewable to all Internal Portal Users. e.g. HNELHD HREC or SCHN exec 1

Description: Add a brief description.

Type: Select 'Contact' in the dropdown.

Application: This is a Standard functionality, not required for.

Step 5**Add contacts**

Note: To add someone to a contact group they must have a REGIS account.

Contact: Select and a panel will appear on the right of the screen.

Step 6

Ensure you are using the 'Person search', this is confirmed by the title of the panel. If the panel is not named Person use the dropdown box to select 'Person'.



Search the persons first or last name.

Step 7

Select the tick box next to the person's contact details and then select the 'Apply' icon.

Repeat steps 6 and 7 for each new person you wish to add.

Step 10

Save the group you have created by selecting 'Save'.

Edit a Contact Group (Add/Remove)

Follow Step 1-3 to locate the Contact Group.

Select . To add people to the group, follow Step 6-7 'Setting up contact groups in REGIS'.

To remove people from the group, select the next to the person you wish to remove.

Save updates to the group by selecting

Save

Homepage Setup

See *Quick Reference Guide – Research Officers – Setting up a home page*

For technical assistance, contact
REGIS HELP DESK

support.f1solutions.com.au
1300 073 447