



## QUICK REFERENCE GUIDE

## FOR RESEARCH OFFICES

# Setting up a Home Page

## Introduction

This document should be used in conjunction with the REGIS User Manual document '[Homepage Tiles](#)'.

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

## What information is needed?

You should have the following information ready to get started in REGIS: your username, password and a list of tasks you would like to see on the home page.

## Home page/dashboard tiles

There are 8 tile options and each tile can be created any number of times with the title and filters changed each time to represent the action of the tile.

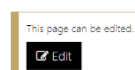
Add dashboard tile	
Found 8 dashboard tiles	
<input type="checkbox"/>	Dashboard Activity
<input type="checkbox"/>	Dashboard Application
<input type="checkbox"/>	Dashboard Decision
<input type="checkbox"/>	Dashboard Document
<input type="checkbox"/>	Dashboard Forms
<input type="checkbox"/>	Dashboard Milestone
<input type="checkbox"/>	Dashboard Review
<input type="checkbox"/>	Dashboard Task

## How many?

Depending on the type and resolution of your screen, you can fit 8-10 visible tiles (2 rows of 4 or 5 tiles). You can add additional tiles, but they are only visible by scrolling down.

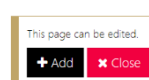
## Create a home page tile

### Step 1



Click the 'Edit' icon at the bottom left of the screen.

Click '+Add' and a black panel will appear on the right side of the screen.



### Step 2

Select the type of tile you wish to create on your homepage by clicking on the check box next to your chosen option and then clicking the apply tick at the bottom of the panel.

A tile will now appear on your home page.

### Step 4

Hovering your mouse over the top right-hand corner of the tile you want to edit, or filter will make the below icons appear.



Selecting the 'Edit' icon will make the 'Edit dashboard tile' panel will appear.

Edit dashboard tile	
Title	Task
Display	Table
Sort by	Current due date
Sort order	Ascending

*Tip: If you cannot see the edit and delete icons, click the 'Edit' icon on the bottom left corner of the screen.*

For further guidance on home page tiles see: [Homepage Tiles](#)

## Standard Ethics Homepage Example

For further guidance see: *Homepage tiles*

The screenshot shows a homepage layout with a sidebar on the left containing icons for Home, New ETH, ETH Eligible, Review Submitted, RFI Received, Approved - Pending Email, New Amendment, Amendment RFI Received, Safety Reporting to HREC, Annual Progress Report, and My Task. The main area contains ten tiles arranged in two rows of five.

**Top Row Tiles:**

- New ETH:** No data found. (Application Tile)
- ETH Eligible:** No data found. (Application Tile)
- Review Submitted:** No data found. (Review Tile)
- RFI Received:** Table with 2 columns: Identifier, Title. Data: 2020/ETH-00880, doc manage. (Application Tile)
- Approved - Pending Email:** Table with 2 columns: Identifier, Title. Data: 2020/ETH-00883, testing ETH document. (Application Tile)

**Bottom Row Tiles:**

- New Amendment:** Table with 2 columns: Identifier, Title. Data: 029399, 029397, 029428, 029457, 029482, 029550. (Form Tile)
- Amendment RFI Received:** Table with 2 columns: Identifier, Title. Data: 029453, 029454, 029611, 029643, 029840, 029842, 029458, 029854, 029793. (Form Tile)
- Safety Reporting to HREC:** Table with 2 columns: Identifier, Title. Data: 029438, 029467, 029471, 029474, 029476. (Form Tile)
- Annual Progress Report:** Table with 3 columns: Identifier, Type, Date received. Data: 2020/ETH-00836, 2020/ETH-00843, 2020/ETH-00844, 2020/ETH-00879, 2020/ETH-00881. (Milestone Tile)
- My Task:** No data found. (Task Tile)



\*There has been a change to this homepage tile as of the 30<sup>th</sup> September 2020, see the QRG: Homepage tiles for details.

## Standard Governance Homepage Example

For further guidance see: **Homepage tiles**

Home

With ROD

Identifier	Title
2020/STE0417	RFI Secong
2020/STE0438	RFI Secong
2020/STE0489	Applicants Email

Application Tile

New STE

Identifier	Title
2020/STE0417	NMA - No - EIT approved
2020/STE0420	KE multisite one NSW one CDR
2020/STE0438	NMA - Underway - when approved
2020/STE0445	Document handling CDRs - Binary
2020/STE0490	Add view FREE
2020/STE0444	New EIT for 2020 residents site

Application Tile

Valid (Pending Ethics)

Identifier	Title
2020/STE0486	OT - R - Clinical Research - Immuno...

Application Tile

STE Eligible

No data found

Application Tile

RFI Received

Identifier	Title
2020/STE0440	RFI Secong
2020/STE0438	RFI Secong - CDR

Application Tile

Pending CE

Identifier	Title
2020/STE0434	RFI Project
2020/STE0436	C25000034+technical - not app...

Application Tile

Authorised - Pending Email

No data found

Application Tile

My Task

No data found

Task Tile

Site Amendment

Identifier	Decision type	Date
2020/STE01453	RGD amendm...	30/07/2020
2020/STE01455	RGD amendm...	03/08/2020
2020/STE01467	RGD amendm...	05/08/2020
2020/STE01455	RGD amendm...	30/07/2020
2020/STE01455	RGD amendm...	06/08/2020
2020/STE01434	RGD amendm...	03/08/2020
2020/STE01405	RGD amendm...	06/08/2020
2020/STE01479	RGD amendm...	07/08/2020
2020/STE01478	RGD amendm...	07/08/2020
2020/STE01477	RGD amendm...	07/08/2020

Decision Tile

Site Amendment RFI Received

No data found

Decision Tile

New Certificate of Currency

Identifier	Type	Date received
2020/STE0487	Certificate of C...	07/07/2020
2020/STE0486	Certificate of C...	05/08/2020
2020/STE0474	Certificate of C...	07/08/2020
2020/STE0485	Certificate of C...	07/08/2020

Milestone Tile

Safety Reporting to RGO

No data found

Decision Tile

Site Annual Report

Identifier	Decision type	Date
2020/STE01405	RGD review of a ...	15/07/2020
2020/STE01405	RGD review of a ...	15/07/2020

Decision Tile