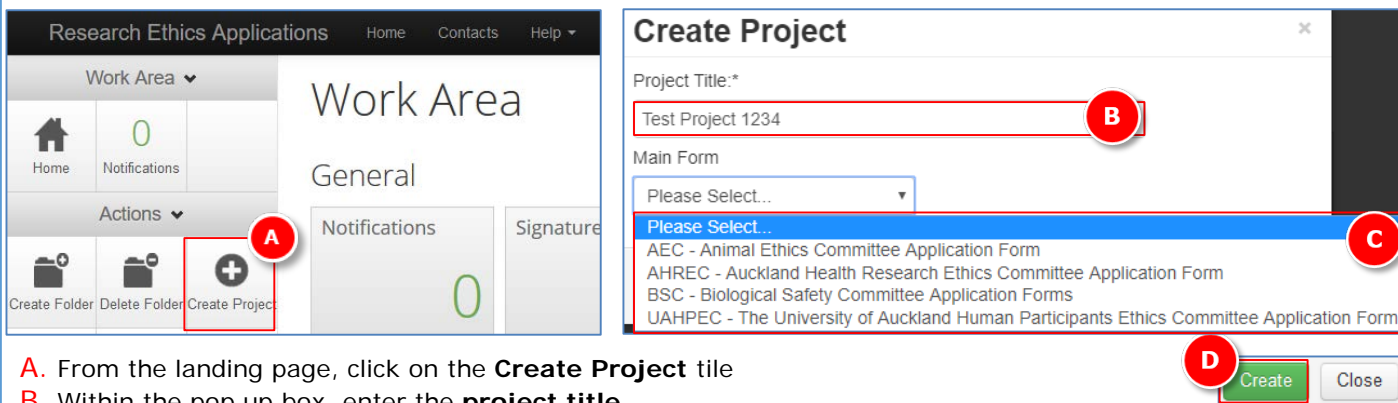


## 1. Introduction

This guide will take you through the steps to create an application for ethics approval within Infonetica Ethics RM.

**NB** The research may not start until ethics approval has been obtained

## 2. Create a project



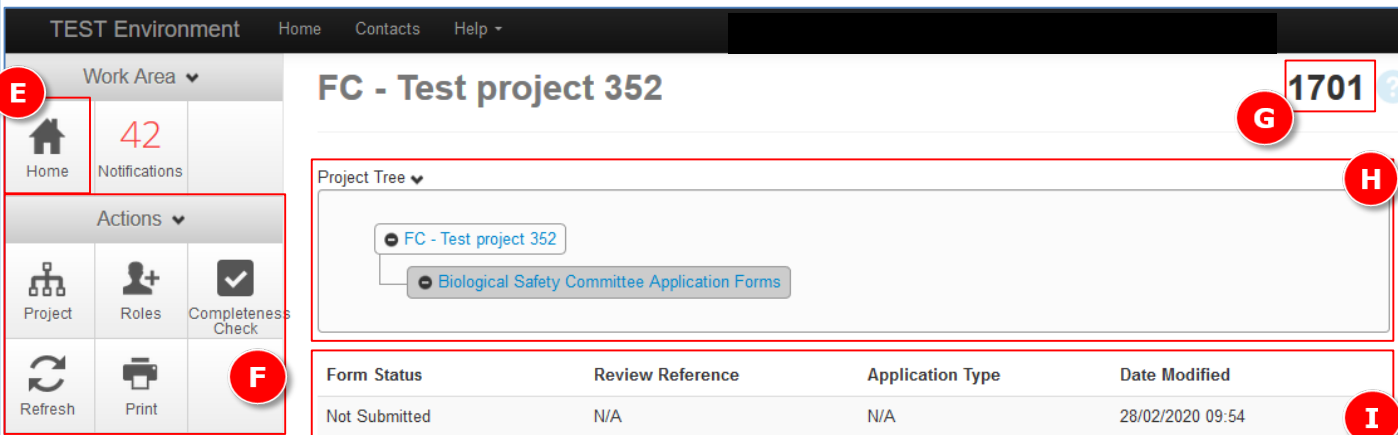
- A. From the landing page, click on the **Create Project** tile
- B. Within the pop up box, enter the **project title**
- C. Select the relevant application form\* from the **Main Form** drop down list
- D. Click **Create**

**NB** \*Biological Safety Committee Applications Forms will allow users to select the **appropriate form** at the next stage (see Step 4 over).

**NB** Once created, the form type cannot be amended, you must delete and start over. The Project Title can be amended within the Project Details section.

## 3. Navigating the application

### Top of the form:



- E. The **Home** icon takes you back to the Work Area landing page
- F. The **Actions** buttons enable you to work with the project you're creating
- G. A **project number** has been allocated
- H. The **Project Tree** shows the name of the project and the form selected
- I. The **Form Status** shows where the application is sitting in the workflow

### Action buttons (F):

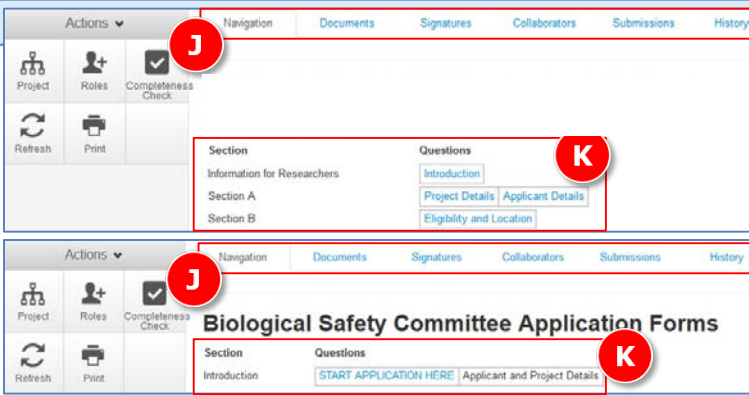
- **Project** – displays the project tree
- **Roles** – enables you to share the application to specific roles for review and input
- **Completeness check** – shows you which questions you have yet to complete
- **Refresh** – refreshes your application showing the most up to date status
- **Print** – allows you to print the form and questions with or without attachments

### 3. Navigating the application (continued)

**Bottom of the form:**

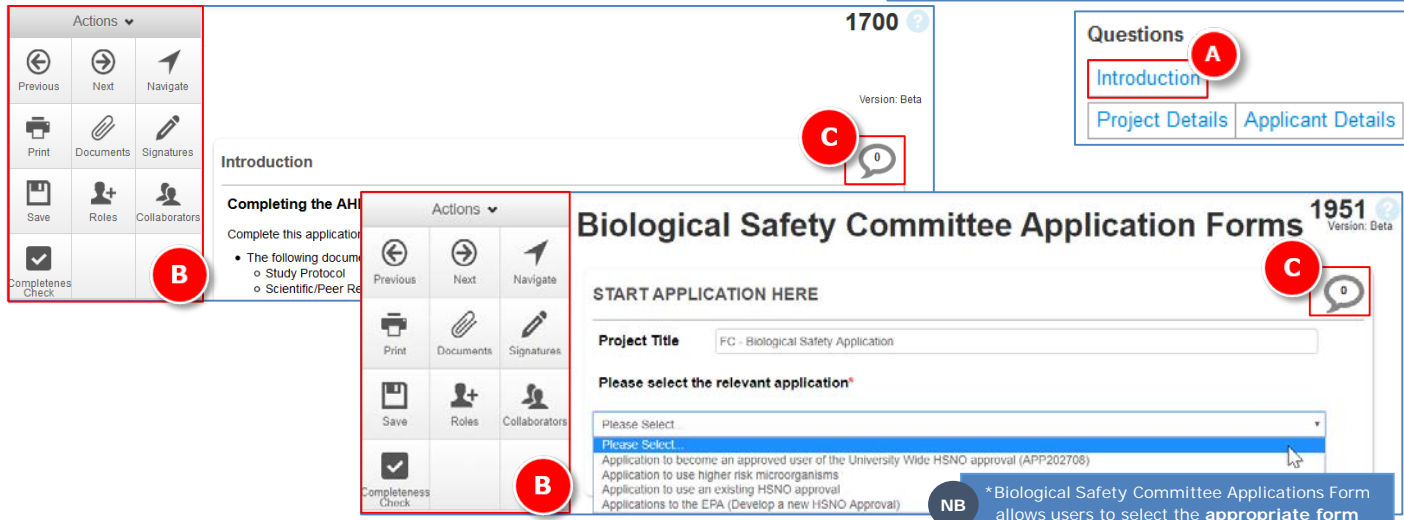
- J. The tool bar allows you to display information relating to the form
- K. Each section of the form is broken into question sets.

**NB** You can complete the application in any order you like, dipping in and out of the question sets using the links.

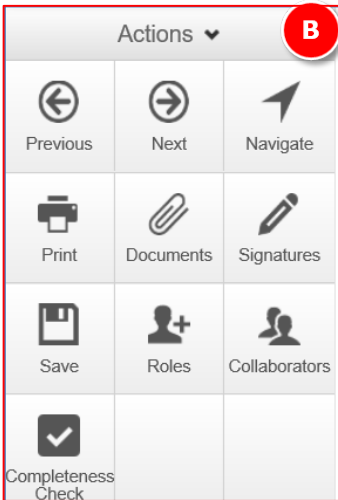


### 4. Filling out the application

- A. Click on the first question to start filling out the form



- B. Use the **Action** buttons to work through the application
- C. Click on the **Comments** bubble to view any comments added by collaborators or approvers



- **Previous** – takes you to the previous page (and automatically saves application)
- **Next** – takes you to the next page (and automatically saves application)
- **Navigate** – takes you back to the front page of the form so that you can select from the list of question sections (and automatically saves application)
- **Print** – allows you to print the form with or without attachments
- **Documents** – displays a list of documents you have uploaded as part of this application (see over for more information on uploading documents)
- **Signatures** – displays a list of people from whom you have requested signatures as part of this application (where applicable) and the current status of these signatures (*not required for Biological Safety Committee applications*)
- **Save** – will save the current page (pages are saved automatically if you click **Next** or **Previous**)
- **Roles** – enables you to share the application to specific roles for review
- **Collaborators** – shows a list of people you have shared the application with
- **Completeness check** - shows you which questions you have yet to complete

### Hints and tips when filling out the form:

- The form is dynamic, so your answers to some questions may result in more or different questions
- Boxes expand as you type into them
- There is a built in spell-check
- Any hyperlink that you click on in the form will open a new window so that you can return to your application
- Information icons **i** will be populated with **Help** information for that question
- The system times out through inactivity after 60 minutes

**NB** The page you are working on will not save unless you click on Save or go to the Previous /Next page (if the system times out you will lose the data on your current page)

## 5. Uploading documents

➤ The form will provide opportunities to upload documents for certain questions

A. To attach a document to the application, click on **Upload Document**

Curriculum vitae

A.12 Please attach the CV of the Principal Investigator. \*

An HRC/MBIE standard CV format is acceptable

Upload Document **A**

B. Click on **Browse** to search for the document

Documents - CV

Please attach your CV here:

Document Name	Version Date	Version
<input type="text" value="CV-example"/>	<input type="text"/>	<input type="text"/>

Browse **B** Upload Close

C. Search your drives / folders for the relevant document and when selected click on **Open**

File Upload

Admin things > cv

Name	Date modified	Type	Size
CV-example	26/07/2019 3:37 PM	Adobe Acrobat D...	363

File name: Admin things\cv\CV-example.pdf

Open **C** Cancel

D. The **document name** will be displayed in Infonetica

E. For documents that have mandatory requirement (e.g. CVs, Protocol), click in the **Version Date** field to bring up the calendar and select the relevant date

F. Enter the **Version number** (when mandatory)

G. Click on **Upload**

Documents - CV

Please attach your CV here:

Document Name	Version Date	Version
CV-example	<input type="text"/>	<input type="text" value="1.0"/>
CV-example.pdf	<input type="text"/>	<input type="text"/>

CV-example **D** Browse **E** **1.0** **F** Upload **G**

Calendar: Jul 2019, 26 selected

Close

H. The document details will be displayed

Curriculum vitae

A.12 Please attach the CV of the Principal Investigator. An HRC/MBIE standard CV format is acceptable\*

Type	Document Name	File Name	Version Date	Version	Size	View	Delete
CV	CV-example	CV-example.pdf	26/07/2019	1.0	362.6 KB	Download	Delete <b>H</b>

## 6. Submitting the application

Once all mandatory questions have been answered, the application can be submitted.

- For AHREC, UAHPEC & AEC applications, the form must be submitted for sign-off by the Academic Head or representative of Auckland DHB (AHREC)– refer to the quick guide **Submitting an Application for sign-off**
- For BSC applications, no sign-off is required and can be submitted direct to the Ethics team – refer to the quick guide **Submitting an Application – no sign off required**