2. The Dashboard

The landing (‘Home’) page for Ethics RM contains a series of tiles and action buttons to access further information and carry out actions across the projects that you have involvement in.

A. **Home** – click from anywhere in the system to return to the landing page

B. **Contacts** - view existing, or add new contacts

C. **Help** – selecting from the drop down provides options for general help, FAQs and templates

D. **User’s name** – selecting from the drop down provides options to change password or personal details and also to log out of the system

E. **Help icon** – provides specific help for the current page

F. **Notifications** - indicates the number of unread notifications; these can be accessed by clicking on the tile (see over page for more information)

G. **Signatures** - indicates the number of outstanding received signature requests; these can be accessed by clicking on the tile

H. **Transfers** - indicates the number of outstanding received transfer requests (ownership of project transferred); these can be accessed by clicking on the tile

I. **Shared** - indicates how many share requests you have; these can be accessed by clicking on the tile (see over page for more information)

J. **Projects** – displays all projects created by the user; click on the project to open it (see over for more info)

K. **Actions** – These buttons change, depending on the application page; allows you to work on an existing application or a new one

**Action buttons (K):**

- **Create Folder** – separate folders can be created to store applications
- **Delete Folder** – enables deletion of previously created folders
- **Create Project** – enables creation of a new application
- **Delete Project** – enables deletion of previously created applications*
- **Duplicate Project** – enables copying of an existing application*
- **Transfer** – enables the transfer of an application to another person*

* Prior to the submission of application to an Ethics committee

Your session will timeout after 60 minutes of inaction
3. The Dashboard – navigating further

A. Click on **Notifications** tile to view the Notifications Table
B. All unread notifications are displayed in yellow, read ones are displayed in grey/white with green tick
C. To mark as read/unread simply click either the tick or the message
D. Click **Back to Work Area** or **Home** to return to the landing/home page

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E. Click on **Shared** tile to view all projects shared with you
F. Click on **View Form** to view the application
G. Click **Reject** if you wish to reject the request of sharing the form e.g. a conflict of interest exists
4. The Dashboard – Searching for projects

Within the Project section there is a Search option, allowing the user to search by any of the fields displayed e.g. Title, IO, Owner, Date etc. This has dynamic search functionality and will start searching as soon as anything is typed into the field.

A. Start typing characters / numbers for the project you want to find

B. The search results will be displayed, filtered from the full list

C. Click on the project from the search results to open the application