

Study Portfolio & Accrual System

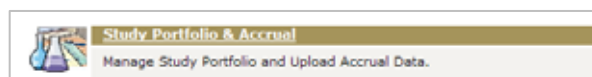
Initialising a Study

Access Permissions

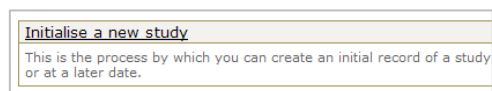
Before you can initialise a study, you must have a UKCRN Portal account and either a 'UKCRN Portfolio Manager' role or a 'Topic Portfolio Manager' role specific for the primary topic of the relevant study. You can use **My Profile** to request these roles.

Step 1: Open the Initialise a New Study Wizard

1. Sign in to the UKCRN Portal as usual.
2. Click the **Study Portfolio & Accrual** link.



3. Click the **Initialise a new study** link.

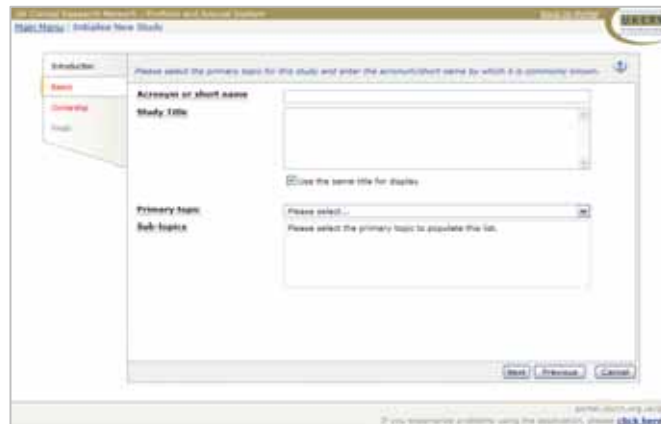


The **Initialise a New Study** wizard opens. The first page you see is the **Introduction page**:



Tip: If you do not want this page to be displayed the next time you open the wizard, uncheck the **Always show this introduction first** box.

4. Click **Next**. The **Basics** page is displayed.



Step 2: Complete the Basics Page

1. Fill out all fields on this page. Advice is given in the table below.

Field Name	Description
Acronym or short name	Required. This will be displayed as the study's acronym in the study record on the UKCRN Portfolio and the public Portfolio database.
Study title	Required. This is the title of the study as it appears on the study protocol. It will be displayed as the study's title in the study record on the public Portfolio database.
Display title	Optional. This only appears if you uncheck the Use the same title for display checkbox. It is a shortened title that appears instead of the Study title in study record on the public Portfolio database.
Primary topic	Required. The main topic to which the study belongs. Please select only one topic; studies can be co-adopted under a second topic after initialisation.
Sub-topics	Required. The sub-topic under which the study falls. Please select only one sub-topic; additional sub-topics can be added after initialisation.

The **Basics** tab changes from **red** to **black** once you have completed all fields.

Note: If the **Basics** tab does not change from **red** to **black** on completion, not all the required fields have been filled in. A study cannot be initialised until all the required fields are populated. *Required fields are highlighted in bold.*

2. Click **Next**. The **Ownership** page is displayed.



Step 3: Complete the Ownership Page

1. Fill out all fields on this page. Advice is given in the table below.

Field Name	Description
Lead country	Required. The country where the study's Chief Investigator is based. This can be changed after initialisation.
Portfolio country	Required. The country for whose portfolio the study is eligible. This can be changed and other countries added after initialisation.
Owning organisations	Required. The main organisation to which the study belongs. This cannot be changed, although other organisations may be added after initialisation.
Portfolio eligibility	Required. Select the reason the study qualifies for inclusion on the UKCRN Portfolio.


When all required fields are filled in, the **Ownership** tab changes from **red** to **black**.

2. Click **Next**. The **Finish** page is displayed.



Step 4: The Finish Page

1. Check the details you have entered are correct.

 **Note:** If you wish to change any details, use the tabbed menu on the left side of the page to go directly to the appropriate page. You can also use the **Next** and **Previous** buttons.

2. Click **Finish**.

The study is initialised and is added to the system as a draft. The study will not be displayed on the public Portfolio database on the NIHR CRN CC website until further study details are added and the study has been released and approved

The Study's **Contacts Management** page opens.




Step 5: Contacts Management

You can specify all or some of the study contacts now or at a later date.


1. In the **Search for a person** box, type the ID number, name or email address of the person you require.
2. Click **Search**.
3. If more than one match is found, click in the **Select from X matches found** box and select the required person. The person's details are displayed below.
4. If you have 'read-only' access, the following text will be displayed beneath the **Main Contact Details**.



To gain full access, in the **Coordinating Centres** field, use **CTRL + left click** to select the coordinating centre relating to the study's primary topic, and then click **Save**.


 **Warning:** You must use the CTRL key. If not, any coordinating centres selected here that are not yet associated with a role will be deselected and removed you click **Save**.

5. Click **Expand** to the right of the organisation to which the study and role relate, and find the appropriate location.

 **Note:** If the required organisation and/or location are not listed, they must be added to the person's profile before the role can be assigned. To do this, please refer to the 'My Profile User Guide'.

6. On the **Roles** bar immediately below the appropriate location, click **Add role**.

7. Click in the **Select role** box and choose the appropriate role. The role is automatically validated.

 **Note:** If you have assigned this role to a new organisation and location (i.e., one that did not previously exist in the system, the role will be pending until the organisation and location have been validated by the NIHR Service Desk.

8. Click **Save**.

9. To specify further roles, repeat this process.

10. If you wish to continue adding further study details, click **Continue to add further study details in Modify Study**, at the bottom of the page. If you do not wish to add any further study details, click **Back to Main Menu** or **Logout**.

For more information, please refer to the *Initialise a New Study User Guide*. This can be accessed from the **Help** link above the tabbed menu in the **Initialise a Study** wizard. If you experience any problems using the application, please contact the NIHR Service Desk team (servicedesk@nihr.ac.uk).

Author: Johanne Crawford

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