

Getting Started with RAS

RAS Training Documentation

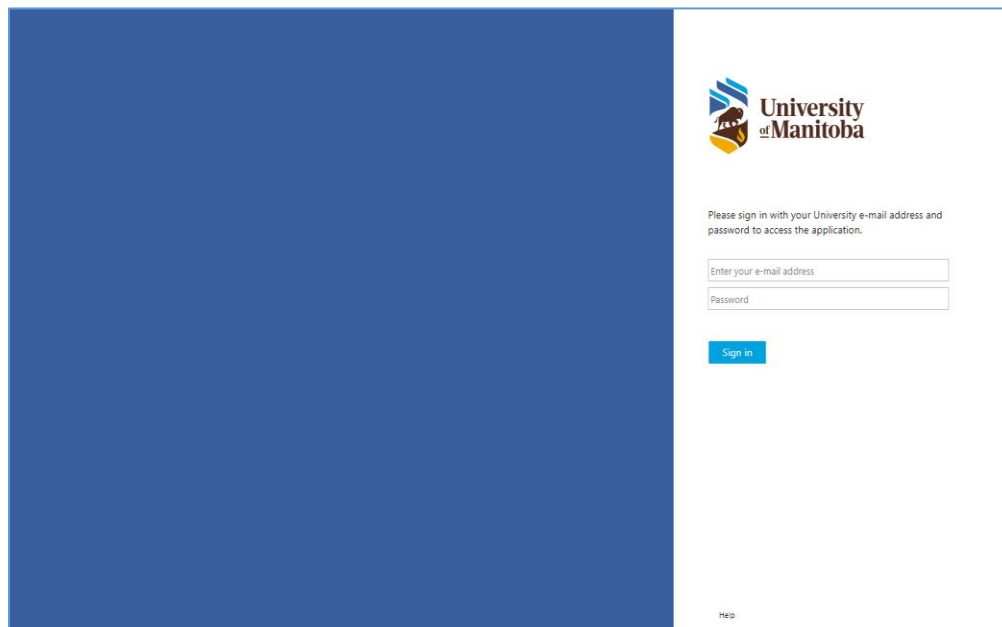
Last Modified: June 20, 2023

Contents

Logging In	3
Portal Layout	3
To Do List View	3
Integrated Tasks List View	5
Navigation	6
Menu Bar	6
LiveList	6
Finder	6
Subject	6
Configuring the LiveList Columns	7
Sorting LiveList Columns	7
Applying LiveList Filters	7
Find & Open a Protocol	9
Lifecycle Event Manager	9
Notifications	14
Tasks	14
To Do List	14
Integrated List	15
Reassigning a Task	16
Removing a Notification	16
Emails	16
Managing your User Profile	18
Profile	19
Contact Info	20
Education	21
Appointments	21
Experience	21
Certifications	21
Add Certifications	21
CORE, PHIA & Oath of Confidentiality	22

Logging In

1. Go to: <https://researchadminsystem.umanitoba.ca/home/>
2. Log into the system using your University of Manitoba email and password
3. Click **Sign in**



University of Manitoba

Please sign in with your University e-mail address and password to access the application.

Enter your e-mail address

Password

Sign in

Help

Portal Layout

There are 2 main views for the system: [To Do List](#) and [Integrated Task List](#).

The **To Do List** view has a dedicated to do list on the left-hand side of the screen. This allows you to quickly see what task you must complete or communication notices easily. Here you can see your to do's and cases (protocols) in one view. **This is the default view for all users.**

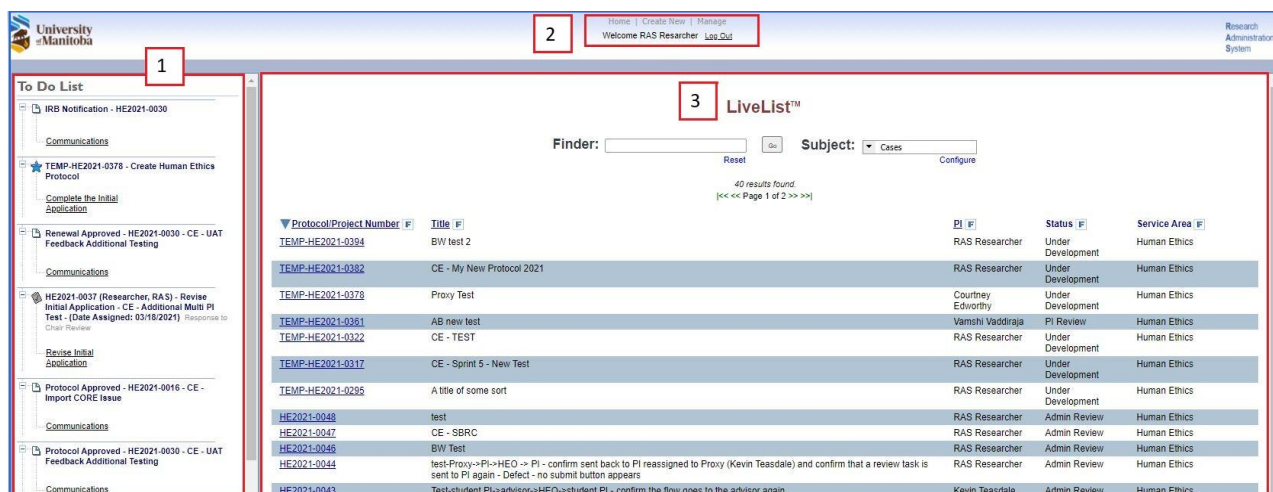
The **Integrated Task List** view incorporates the To Do list into a dedicated task list. This allows you to sort and filter through your tasks easily. This view is meant for users that receive a lot of tasks/to do's daily, i.e. Human Ethics Office staff.

Note: Any user can request to have the **Integrated Task List** view instead of the **To Do List** view. Please contact the system administrator to make this change.

To Do List View

There are three sections to take note of when you login to the system.

1. **To Do List** – The To Do List contains tasks and messages for the logged in user to complete.
2. **Menu Bar** – The Menu Bar provides access to major functions of the system based upon the role(s) assigned to the user. This area also displays the name of the logged in user and provides the function to log out of the system.
3. **LiveList** – This displays all Protocols & Projects where you have View, Edit or Signature access functionality.



University of Manitoba | Home | Create New | Manage | Welcome RAS Researcher | Log Out | Research Administration System

To Do List

- IRB Notification - HE2021-0030
- TEMP-HE2021-0378 - Create Human Ethics Protocol
- Renewal Approved - HE2021-0030 - CE - UAT Feedback Additional Testing
- HE2021-0037 (Researcher, RAS) - Revise Initial Application - CE - Additional Multi PI Test - (Date Assigned: 03/19/2021) Response to Chair Review
- Protocol Approved - HE2021-0016 - CE - Import CORE Issue
- Protocol Approved - HE2021-0030 - CE - UAT Feedback Additional Testing

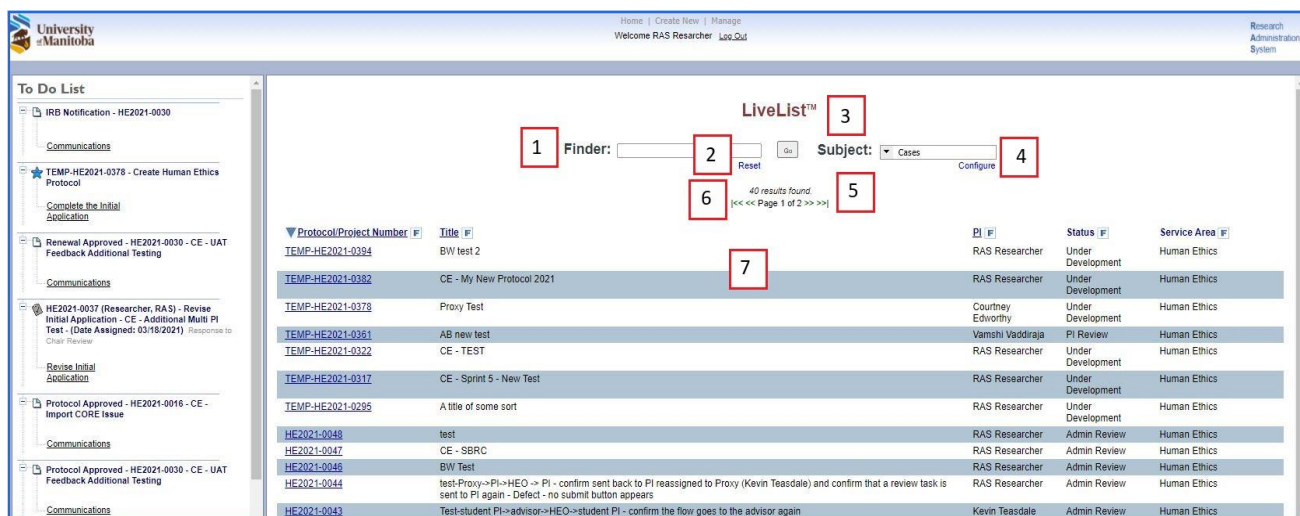
LiveList™

Finder: Reset Go Subject: Cases Configure

40 results found. << Page 1 of 2 >>

Protocol/Project Number	Title	PI	Status	Service Area
TEMP-HE2021-0394	BW test 2	RAS Researcher	Under Development	Human Ethics
TEMP-HE2021-0382	CE - My New Protocol 2021	RAS Researcher	Under Development	Human Ethics
TEMP-HE2021-0378	Proxy Test	Courtney Edworthy	Under Development	Human Ethics
TEMP-HE2021-0361	AB new test	Vamshi Vaddiraja	PI Review	Human Ethics
TEMP-HE2021-0322	CE - TEST	RAS Researcher	Under Development	Human Ethics
TEMP-HE2021-0317	CE - Sprint 5 - New Test	RAS Researcher	Under Development	Human Ethics
TEMP-HE2021-0295	A title of some sort	RAS Researcher	Under Development	Human Ethics
HE2021-0048	test	RAS Researcher	Admin Review	Human Ethics
HE2021-0047	CE - SBRC	RAS Researcher	Admin Review	Human Ethics
HE2021-0046	BW Test	RAS Researcher	Admin Review	Human Ethics
HE2021-0044	test-Proxy->PI->HEO -> PI - confirm sent back to PI reassigned to Proxy (Kevin Teasdale) and confirm that a review task is sent to PI again - Defect - no submit button appears	RAS Researcher	Admin Review	Human Ethics
HE2021-0043	Test-student PI->advisor->HEO->student PI - confirm the flow goes to the advisor again	Kevin Teasdale	Admin Review	Human Ethics

- Finder** – The Finder is a single field that allows the user to search for records.
- Reset** – The Reset function clears any sorts and filters previously set.
- Subject** – The Subject drop down provides the user access to additional information based upon security privileges. This view defaults to the Cases list.
- Configure** – The Configure function allows the user to define the Information columns to be displayed.
- Results** – Displays the number of records returned.
- Pagination** – Provides navigational control when the number of records returned exceeds the display limit on the page.
- Information** – Displays information from the records. The columns displayed are controlled by using the Configure function.



University of Manitoba | Home | Create New | Manage | Welcome RAS Researcher | Log Out | Research Administration System

To Do List

- IRB Notification - HE2021-0030
- TEMP-HE2021-0378 - Create Human Ethics Protocol
- Renewal Approved - HE2021-0030 - CE - UAT Feedback Additional Testing
- HE2021-0037 (Researcher, RAS) - Revise Initial Application - CE - Additional Multi PI Test - (Date Assigned: 03/19/2021) Response to Chair Review
- Protocol Approved - HE2021-0016 - CE - Import CORE Issue
- Protocol Approved - HE2021-0030 - CE - UAT Feedback Additional Testing

LiveList™

Finder: Reset Go Subject: Cases Configure

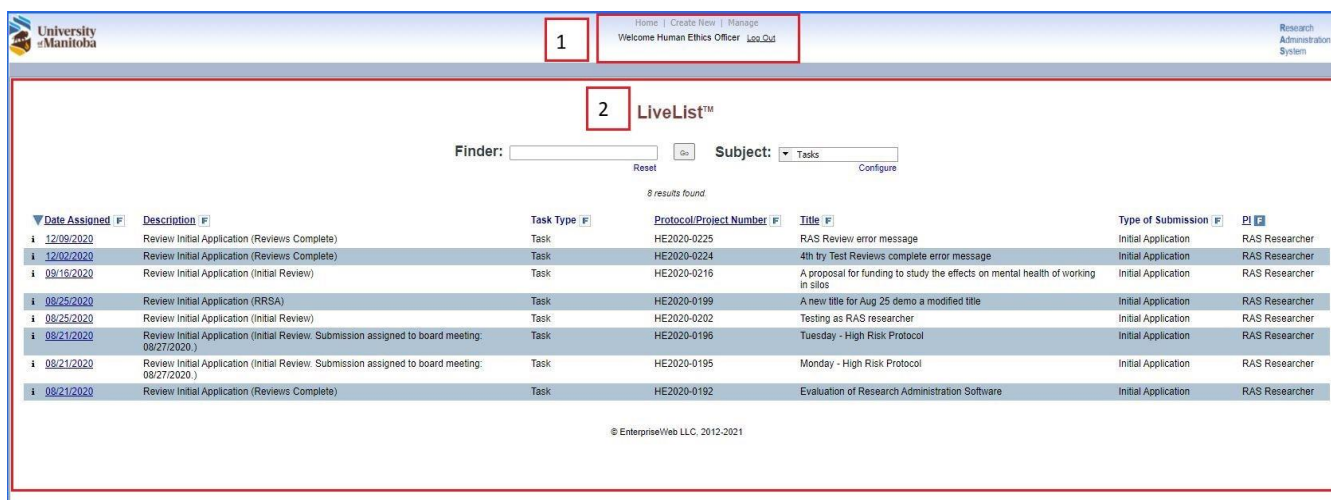
40 results found. << Page 1 of 2 >>

Protocol/Project Number	Title	PI	Status	Service Area
TEMP-HE2021-0394	BW test 2	RAS Researcher	Under Development	Human Ethics
TEMP-HE2021-0382	CE - My New Protocol 2021	RAS Researcher	Under Development	Human Ethics
TEMP-HE2021-0378	Proxy Test	Courtney Edworthy	Under Development	Human Ethics
TEMP-HE2021-0361	AB new test	Vamshi Vaddiraja	PI Review	Human Ethics
TEMP-HE2021-0322	CE - TEST	RAS Researcher	Under Development	Human Ethics
TEMP-HE2021-0317	CE - Sprint 5 - New Test	RAS Researcher	Under Development	Human Ethics
TEMP-HE2021-0295	A title of some sort	RAS Researcher	Under Development	Human Ethics
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HE2021-0047	CE - SBRC	RAS Researcher	Admin Review	Human Ethics
HE2021-0046	BW Test	RAS Researcher	Admin Review	Human Ethics
HE2021-0044	test-Proxy->PI->HEO -> PI - confirm sent back to PI reassigned to Proxy (Kevin Teasdale) and confirm that a review task is sent to PI again - Defect - no submit button appears	RAS Researcher	Admin Review	Human Ethics
HE2021-0043	Test-student PI->advisor->HEO->student PI - confirm the flow goes to the advisor again	Kevin Teasdale	Admin Review	Human Ethics

Integrated Tasks List View

There are two sections to take note of when you login to the system.

1. **Menu Bar** – The Menu Bar provides access to major functions of the system based upon the role(s) assigned to the user. This area also displays the name of the logged in user and provides the function to log out of the system.
2. **LiveList** – This displays all Protocols & Projects where you have View, Edit or Signature access functionality.



1

2

LiveList™

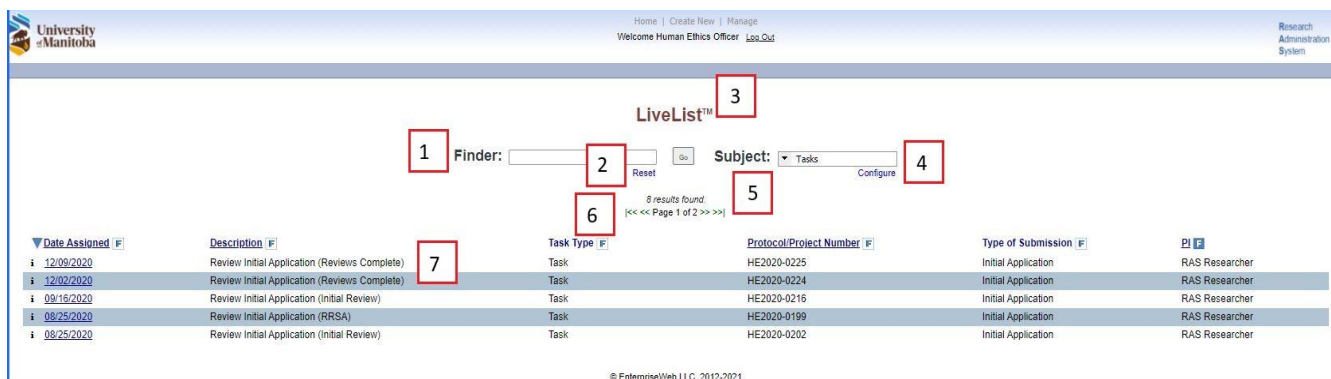
Finder: Reset Go Subject: Tasks Configure

8 results found

Date Assigned	Description	Task Type	Protocol/Project Number	Title	Type of Submission	PI
12/09/2020	Review Initial Application (Reviews Complete)	Task	HE2020-0225	RAS Review error message	Initial Application	RAS Researcher
12/02/2020	Review Initial Application (Reviews Complete)	Task	HE2020-0224	4th try Test Reviews complete error message	Initial Application	RAS Researcher
09/16/2020	Review Initial Application (Initial Review)	Task	HE2020-0216	A proposal for funding to study the effects on mental health of working in silos	Initial Application	RAS Researcher
09/25/2020	Review Initial Application (RRSA)	Task	HE2020-0199	A new title for Aug 25 demo a modified title	Initial Application	RAS Researcher
09/25/2020	Review Initial Application (Initial Review)	Task	HE2020-0202	Testing as RAS researcher	Initial Application	RAS Researcher
09/21/2020	Review Initial Application (Initial Review: Submission assigned to board meeting: 09/27/2020.)	Task	HE2020-0196	Tuesday - High Risk Protocol	Initial Application	RAS Researcher
09/21/2020	Review Initial Application (Initial Review: Submission assigned to board meeting: 09/27/2020.)	Task	HE2020-0195	Monday - High Risk Protocol	Initial Application	RAS Researcher
09/21/2020	Review Initial Application (Reviews Complete)	Task	HE2020-0192	Evaluation of Research Administration Software	Initial Application	RAS Researcher

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1. **Finder** – The Finder is a single field that allows the user to search for records.
2. **Reset** – The Reset function clears any sorts and filters previously set.
3. **Subject** – The Subject drop down provides the user access to additional information based upon security privileges. This view defaults to the Tasks list.
4. **Configure** – The Configure function allows the user to define the Information columns to be displayed.
5. **Results** – Displays the number of records returned.
6. **Pagination** – Provides navigational control when the number of records returned exceeds the display limit on the page.
7. **Information** – Displays information from the records. The columns displayed are controlled by using the Configure function.



1

2

3

4

5

6

7

LiveList™

Finder: Reset Go Subject: Tasks Configure

8 results found
|<< << Page 1 of 2 >> >>|

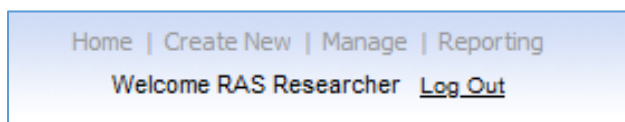
Date Assigned	Description	Task Type	Protocol/Project Number	Type of Submission	PI
12/09/2020	Review Initial Application (Reviews Complete)	Task	HE2020-0225	Initial Application	RAS Researcher
12/02/2020	Review Initial Application (Reviews Complete)	Task	HE2020-0224	Initial Application	RAS Researcher
09/16/2020	Review Initial Application (Initial Review)	Task	HE2020-0216	Initial Application	RAS Researcher
09/25/2020	Review Initial Application (RRSA)	Task	HE2020-0199	Initial Application	RAS Researcher
09/25/2020	Review Initial Application (Initial Review)	Task	HE2020-0202	Initial Application	RAS Researcher

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Navigation

Menu Bar

The Menu Bar provides access to major functions of the system based upon the role(s) assigned to the user. This area also displays the name of the logged in user and provides the function to log out of the system.



- **Home:** The Home button is used to bring you back to the LiveList page. This button should always be used instead of the Back button on your Browser.
- **Create New:** Use the Create New button to create a new Human Ethics Protocol, Animal Use Protocol or Proposal.
- **Manage:** Under Manage you will find User Profile settings as well as management of notifications and ethics boards. What you see is dependent on your role/security privileges.

LiveList

The LiveList displays all Protocols & Projects where you have View, Edit or Signature access functionality. Here you will see two main fields: **Finder** and **Subject**. These fields will be used to find and filter records.

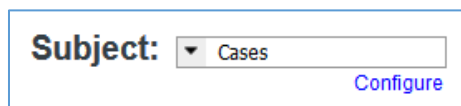
Finder

The Finder field is used to search for items within the specified Subject that is selected.



Subject

The Subject drop down contains different lists depending on the user's role/security privileges. The Subject specifies the items you are searching for when using the Finder.



All users will see:

- **Cases:** Cases are accessible to all users and includes a list of all protocols and projects that the user has either reviewed or is a member of the research team.
- **Reference Materials:** Reference materials refers to checklists, SOPs, guidance documents or other reference material.

Some users will have view-only access to protocols:

- **View Human Ethics Cases:** Use this subject to view all Human Ethics cases.

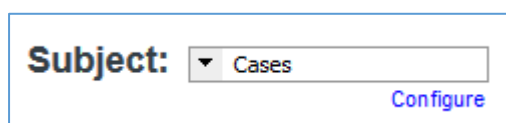
Configuring the LiveList Columns

Each Subject within the drop down has a definable list of columns to be displayed within the LiveList. Each Subject item is configured independently. The settings made are stored and used each time the page is opened, meaning you will only have to make this change once and it's saved for the next time you login.

For example: **Cases** Subject list includes these available fields

To configure the columns displayed on the LiveList page:

1. Select the appropriate Subject item from the drop down, click **Configure**



2. Here you can set the number of **Records Per Page**
3. Check the box next to each column you would like to appear on the LiveList
Note: There is a max. of 14 columns that can be shown at a time.
4. Click **Update** to save and close



Sorting LiveList Columns

Each column in the LiveList allows you to sort ascending or descending.

To sort the columns displayed on the LiveList page

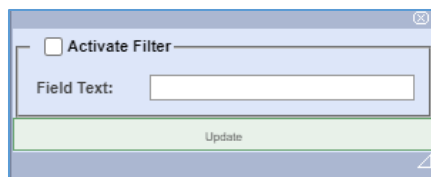
1. Click on the column name, a ▼ will appear to the left of the column name to indicate this column is being sorted ascendingly
2. Click the same column again to sort descending, a ▲ will appear to indicate descending

Applying LiveList Filters

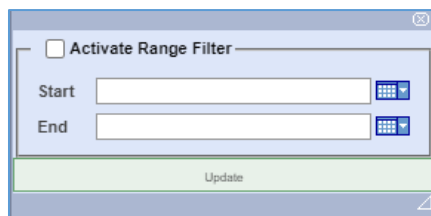
The columns on the LiveList allow you to apply a filter to assist in locating records. There are three types of filters available: text, date, and value. Multiple filters may be set concurrently to further reduce the number of records returned.

Filter Types:

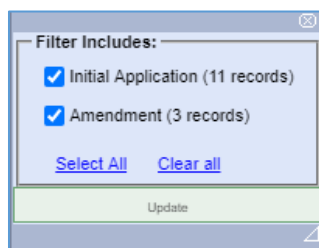
1. **Text** – Provides a filter based upon text contained within the field.



- a. Protocol Number
 - b. Protocol Title
 - c. PI
2. **Dates** – Provides filtering based upon a date range.




- a. Approval Start Date
 - b. Approval End Date
3. **List of Values** – Provides filtering based upon a defined list of values that exist for the field.




- a. Department
- b. Status
- c. Type

To apply a Filter:

1. From the LiveList page
2. **Right click** on the  icon for the desired column to view filter options
3. Do one or more of the following:
 - a. Enter text in the **Field Text** field provided
 - b. Enter **Start** and **End date**
 - c. Select one or many desired values from list provided for the field
4. Check the **Activate Filter** where appropriate
5. Click **Update** to apply the filter

To remove a Filter:

1. From the LiveList page

2. **Right click** on the  icon for the desired column to view filter options
3. Depending on the type of filter either:
 - a. Uncheck Activate Filter if applicable
 - b. Uncheck/check any values from the list
4. Click **Update**

Find & Open a Protocol

To find and open an Existing Protocol:

1. From the LiveList page, select **Cases** from the Subject drop down
2. Click within the **Finder** textbox
3. Enter one of the following:
 - a. Protocol Number
Note: For searching migrated protocol numbers with colons or brackets, the wildcard (*) is required for searching. This means that you cannot copy and paste the full migrated protocol number "HS12345 (P2000:123)" into the finder.
 - i. to search for P2000:123, type ***P2000*123**
 - ii. to search the HS number, type **HS12345**
 - b. PI First and/or Last Name
 - c. Partial string from the Title
4. Click **Go**, the LiveList will now filter based on the entered criteria
5. Click on the **Protocol Number** link to open the protocol
6. To go back to the LiveList click on the **Protocol Number** link again, do not use the Back button on your browser

Lifecycle Event Manager

The Lifecycle Event Manager contains summary information about the research protocol, submission history information, and any actions available to the logged in user.

Lifecycle Event Manager: This tab allows the user to view the status for each submission for the selected protocol.

1. **Actions:** This drop down is used to create new submissions for the selected protocol.
2. **Status:** This section shows the current status of the selected protocol.
3. **Submissions:** This section allows the user to view each individual submission or withdraw the submission if it hasn't been approved yet.

ID Number F

HE2020-0197

Title F

Tuesday - Amendment

PI F

RAS Researcher

Status F

Active

Type F

Human Ethics

Lifecycle Event Manager

Communications

Summary

Research Personnel

Participants

Consent Process

Data

Risks/Benefits

Dissemination/Withdrawing

Attachments

Main

1

2

Actions

Go

Stage: Protocol

Approval Start: 08/24/2020

Risk Level:

Review Frequency: 364 days

Status: Active

Approval End: 08/20/2021

Assigned REB: PSREB

Original Approval Date: 08/21/2020

3

Submissions

Type	Receipt Date	Summary	Status	Decision	Lifecycle	Details	Actions
3 Amendment	08/25/2020	View	Admin Review	Pending	View	View	Withdraw
2 Personnel Change	08/24/2020	View	Completed	Approved	View	View	
1 Initial Application	08/21/2020	View	Completed	Approved	View	View	

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Lifecycle History

The Lifecycle History view shows the history of the submission.

To view the Lifecycle history

1. Click the **View** link under the **Lifecycle** column, window opens
2. All events are listed in chronological order

Migrated Protocols Lifecycle History

When viewing the lifecycle history of a migrated protocol you will see the approval dates.

*To learn more about Migrated Protocols see the Migrated Protocol section in the Human Ethics Submission Training Document.

Lifecycle History

Event #1: New Human Ethics Protocol Created

Who: RAS Researcher

Start: Fri Aug 21 2020 15:48:41
End: Fri Aug 21 2020 15:50:50

Duration: 0 days, 0 hours, 2 minutes

Result: Initial Application Sent to Coordinator

Event #2: Initial Application Being Processed

Who: Human Ethics Officer

Start: Fri Aug 21 2020 15:50:50
End: Mon Aug 24 2020 11:52:34

Duration: 2 days, 20 hours, 1 minutes


Result: Initial Application Reviewed

Lifecycle History	
Event #1: Response to Board / Chair Created	
Who: CONVERSION	Approved: Wed Mar 31 2021 00:00:00
	Start: Wed Mar 31 2021 00:00:00
	End: Thu Mar 31 2022 00:00:00
Result: Response to Board / Chair Converted	

Print a Submission

The system allows you to print each individual submission and download all attachments.

To print a submission

1. Click the **View** link under the **Details** column, window opens
2. Click the **Print** link at the top of the window, this will print the current version
3. Click  under **Download PDF** within each version of the **Review Dashboard** to view/print that version that was submitted to the Human Ethics Office

Note: If you get a message that the page is not responding, please click 'Wait' and page will continue to load. If no window appears, please ensure your pop-up blocker is disabled.

To download attachments


1. Click the **View** link under the **Details** column, window opens
2. Click the **ZIP Attachments** link at the top right-hand side of the window
3. This will download all attachments for this submission in a ZIP folder on your computer

Submission Type: Initial Application


[Print](#)
[ZIP Attachments](#)

Review Dashboard
Summary
Research Personnel
Participants
Consent Process
Data
Deception
Risks/Benefits
Dissemination/Withdrawing
Indigenous Peoples
Attachments

Version 1

Date	Duration	Type	Process	Board	Decision	Download PDF
6/1/2023	0 days, 0 hrs, 20 mins	Analyst	Administrative		Returned to PI	
6/1/2023	0 days, 0 hrs, 5 mins	Research Team	Revision		Status = Complete	


Version 2

Date	Duration	Type	Process	Board	Decision	Download PDF
6/3/2023	0 days, 23 hrs, 10 mins	Analyst	Administrative		Setup Review	
6/3/2023	2 days, 18 hrs, 32 mins	Chair Review	Chair - Provide Review	REB1	Modifications Required	
6/6/2023	0 days, 0 hrs, 30 mins	Research Team	Revision		Status = Complete Examine Modifications Required	

Withdraw Submission

1. Under the Lifecycle Event Manager tab, select **Withdraw** under actions

Note: This function is only meant to be used if you no longer wish to submit. Once withdrawn you cannot re-submit to the Human Ethics Office. You can only withdraw a submission after it has been submitted but prior to approval.

Submissions							
Type	Receipt Date	Summary	Status	Decision	Lifecycle	Details	Actions
3 Amendment	08/25/2020	View	Admin Review	Pending	View	View	
2 Personnel Change	08/24/2020	View	Completed	Approved	View	View	
1 Initial Application	08/21/2020	View	Completed	Approved	View	View	

Delete Task/Submission

- Under the Lifecycle Event Manager tab, select **Delete** under actions

Note: You can only delete prior to submission to the board.

Submissions							
Type	Receipt Date	Summary	Status	Decision	Lifecycle	Details	Actions
2 Personnel Change		View	In Development	Pending	View	View	Delete Reassign Task
1 Initial Application	06/15/2023	View	Completed	Approved	View	View	

Reassign Task/Submission

A submission can be reassigned to any research member with **edit access**. Once reassigned, the submission can then be submitted back to the PI or reassigned to another research member with **edit access**.

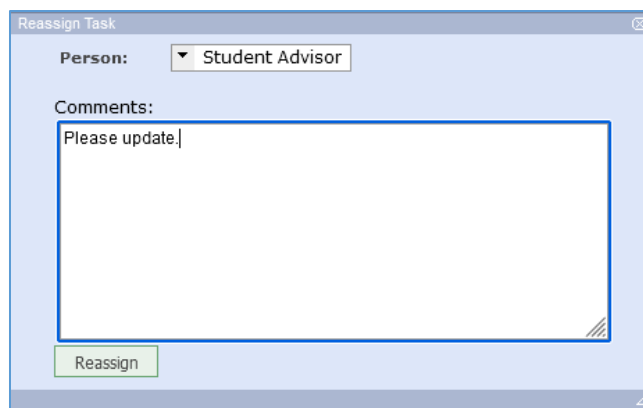
Important: Only research members with Edit Access can be reassigned the submission.

- Under the Lifecycle Event Manager tab, select **Reassign Task** under actions

Note: You can only reassign task prior to submission to the board.

Submissions							
Type	Receipt Date	Summary	Status	Decision	Lifecycle	Details	Actions
2 Personnel Change		View	In Development	Pending	View	View	Delete Reassign Task
1 Initial Application	06/15/2023	View	Completed	Approved	View	View	

- Select the research member in the **Person** drop down list
 - Add any instructions to the **Comments** text area, optional
- Note:** These notes will appear in the Lifecycle History view for all to view



- Click **Reassign**, then **OK**
- Task is now reassigned and will be in this research members To Do List.

Communications: Provides access to notifications and/or letters that have been sent out by the HEO office.

Lifecycle Event Manager
Communications
Summary
Research Personnel
Secondary Use of Data
Attachments

Letters

Protocol Specific Communications

	Name	From	To	CC	Create Date	Sent Date	Document	Description
1	IRB Notification - HE2022-0034	Karlee Dyck	Courtney Edworthy		02/28/2022	02/28/2022	View	
2	IRB Notification - HE2022-0034	Karlee Dyck	Courtney Edworthy		03/04/2022	03/04/2022	View	

Submission Specific Communications

	Name	From	To	CC	Create Date	Sent Date	Document	Description
1	Protocol Approved	Karlee Dyck	Evelyn Yeung		02/28/2022	02/28/2022	View	

Protocol Information: The other tabs in this section show all the currently approved information for the currently selected protocol. Click through each tab to view additional information. The Attachments tab also allows you to download any attachments (i.e. Consent Documents) that have been approved on this protocol.

ID Number **HE2020-0197**
Title **Tuesday - Amendment**
PI **RAS Researcher**
Status **Active**
Type **Human Ethics**

Lifecycle Event Manager
Communications
Summary
Research Personnel
Participants
Consent Process
Data
Risks/Benefits
Dissemination/Withdrawing
Attachments

Summary
Purpose of the Research
Research
General Questions

Protocol Title

Tuesday - Amendment

Principal Investigator

RAS Researcher

Is the Principal Investigator for this project a student?

No

Primary Department

Max Rady College of Medicine

Application Initiated By

RAS Researcher

previous
next

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Notifications

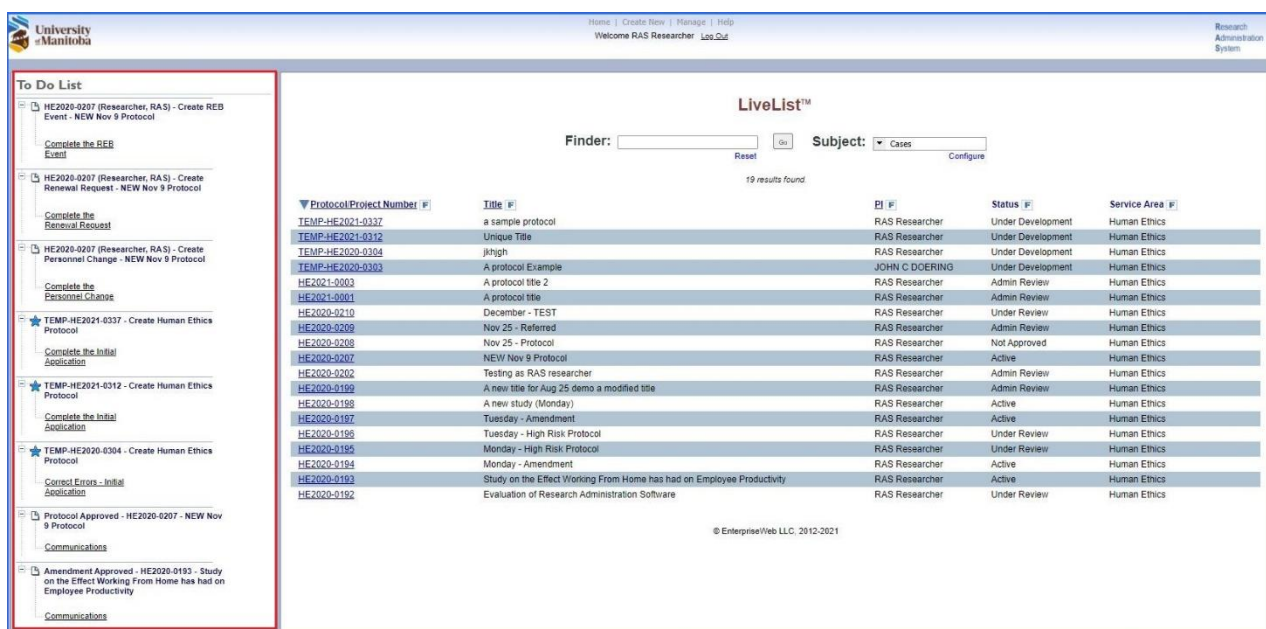
There are two types of notifications:

1. **Tasks**
 - a. You can see these in the **To Do List** or under **Tasks** in the Subject drop down i.e. protocol expiry, amendment to be done, something to be signed, REB agenda
2. **Emails**
 - a. These are sent to you when something is triggered in the system i.e. protocol approval, protocol revisions, review requested etc.

Tasks

To Do List

In the To Do List all tasks, communications, and notifications are listed here.



The screenshot shows the University of Manitoba Research Administration System (RAS) interface. On the left is the 'To Do List' sidebar with tasks categorized by protocol number and action type (e.g., 'Complete the REB Event', 'Complete the Renewal Request', 'Complete the Initial Application'). The main area displays the 'LiveList™' table with 19 results found. The table has columns for Protocol/Project Number, Title, PI, Status, and Service Area. The tasks listed in the To Do List correspond to the entries in the LiveList table.

Protocol/Project Number	Title	PI	Status	Service Area
TEMP-HE2021-0337	a sample protocol	RAS Researcher	Under Development	Human Ethics
TEMP-HE2021-0312	Unique Title	RAS Researcher	Under Development	Human Ethics
TEMP-HE2020-0304	jkhigh	RAS Researcher	Under Development	Human Ethics
TEMP-HE2020-0303	A protocol Example	JOHN C DOERING	Under Development	Human Ethics
HE2021-0003	A protocol title 2	RAS Researcher	Admin Review	Human Ethics
HE2021-0001	A protocol title	RAS Researcher	Admin Review	Human Ethics
HE2020-0210	December - TEST	RAS Researcher	Under Review	Human Ethics
HE2020-0209	Nov 25 - Referred	RAS Researcher	Admin Review	Human Ethics
HE2020-0208	Nov 25 - Protocol	RAS Researcher	Not Approved	Human Ethics
HE2020-0207	NEW Nov 9 Protocol	RAS Researcher	Active	Human Ethics
HE2020-0202	Testing as RAS researcher	RAS Researcher	Admin Review	Human Ethics
HE2020-0199	A new title for Aug 25 demo a modified title	RAS Researcher	Admin Review	Human Ethics
HE2020-0198	A new study (Monday)	RAS Researcher	Active	Human Ethics
HE2020-0197	Tuesday - Amendment	RAS Researcher	Active	Human Ethics
HE2020-0196	Tuesday - High Risk Protocol	RAS Researcher	Under Review	Human Ethics
HE2020-0195	Monday - High Risk Protocol	RAS Researcher	Under Review	Human Ethics
HE2020-0194	Monday - Amendment	RAS Researcher	Active	Human Ethics
HE2020-0193	Study on the Effect Working From Home has had on Employee Productivity	RAS Researcher	Active	Human Ethics
HE2020-0192	Evaluation of Research Administration Software	RAS Researcher	Under Review	Human Ethics

Who gets the task:

- **PI:** receives all submission related tasks i.e. Revise Application, Correct Errors, PI Sign-Off etc.
 - o The one exception would be if a Designate is submitting the protocol, the PI would receive the tasks prior to submission i.e. Complete Initial Application
- **Reviewers/Chair:** receives all review and board related tasks i.e. Complete Review, View Agenda etc.

As you can see in the below screenshot there are 3 tasks listed. The first is a Revise Initial Application task, then we have a Correct Errors task (as you can see this is a TEMP protocol meaning it has not been submitted to the HEO yet). The last task is a Complete the Personnel Change form task, this task means you have started a Personnel Amendment form for this protocol but have not submitted it yet to the HEO.

Note: You cannot complete a task by opening the protocol from the LiveList, you must complete by clicking on it within the To Do List.

To Do List

HE2020-0198 (Researcher, RAS) - Revise Initial Application - A new study (Monday) - (Date Assigned: 01/29/2021) RRSA

[Revise Initial Application](#)

★ TEMP-HE2021-0295 - Create Human Ethics Protocol

[Correct Errors - Initial Application](#)


HE2020-0214 (Researcher, RAS) - Create Personnel Change - JH - Migrated Protocol Test

[Complete the Personnel Change](#)

There are many different types of tasks you will see listed here along with these which can include: Review REB Agenda, New Protocol for Review, Protocol Expiry, and any Protocol Approval notifications.

Integrated List

To view tasks, go to the Tasks drop down item under Subject.



[Home](#) | [Create New](#) | [Manage](#)
 Welcome Human Ethics Officer [Log Out](#)

Research Administration System

LiveList™

Finder: Reset

Subject: ▼ Tasks Configure

8 results found

▼ Date Assigned	Description	Task Type	Protocol/Project Number	Title	Type of Submission	PI
12/09/2020	Review Initial Application (Reviews Complete)	Task	HE2020-0225	RAS Review error message	Initial Application	RAS Researcher
12/02/2020	Review Initial Application (Reviews Complete)	Task	HE2020-0224	4th try Test Reviews complete error message	Initial Application	RAS Researcher
09/19/2020	Review Initial Application (Initial Review)	Task	HE2020-0216	A proposal for funding to study the effects on mental health of working in silos	Initial Application	RAS Researcher
08/25/2020	Review Initial Application (RRSA)	Task	HE2020-0199	A new title for Aug 25 demo a modified title	Initial Application	RAS Researcher
08/25/2020	Review Initial Application (Initial Review)	Task	HE2020-0202	Testing as RAS researcher	Initial Application	RAS Researcher
08/21/2020	Review Initial Application (Initial Review: Submission assigned to board meeting: 08/27/2020.)	Task	HE2020-0196	Tuesday - High Risk Protocol	Initial Application	RAS Researcher
08/21/2020	Review Initial Application (Initial Review: Submission assigned to board meeting: 08/27/2020.)	Task	HE2020-0195	Monday - High Risk Protocol	Initial Application	RAS Researcher
08/21/2020	Review Initial Application (Reviews Complete)	Task	HE2020-0192	Evaluation of Research Administration Software	Initial Application	RAS Researcher

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Subject: ▼ Tasks Configure

Any task that is assigned to you will be listed here. In this view you can also sort and filter the list.

See [Configuring the LiveList Columns](#) for more information.

Reassigning a Task

A task assigned to you can be reassigned to any one on the protocol that has edit access or signing authority. These tasks include completing a protocol or follow-on submission.

When a submission is sent back from the HEO for revisions the task is always sent back to the PI. If the protocol has a Study Coordinator and/or Co-PI (or other role) listed on the protocol that has edit access or signing authority for that protocol they can reassign the task to themselves to complete, if needed.

See Delete or Reassign Task section under the [Lifecycle Event Manager](#).

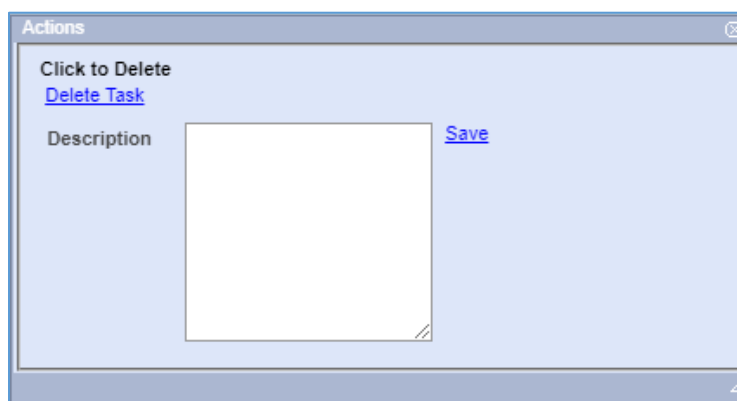
Removing a Notification

Done by reassigning, completing, or deleting (communications/notifications).

To delete a notification i.e. Review REB Agenda, Protocol Approval etc.

1. Open the task
2. Click the **Delete** button

In the Integrated Task List view, you can right click on the task from the list and click **Delete Task**.



Note: Only communications and notifications can be deleted this way.


Emails

When a task is generated, in most cases, an email notification is also generated and sent to the user.

Types of emails you may receive are: PI Sign Off Required, New Protocol for Review, Protocol Approved or Protocol Closure.


An example of a Protocol Approval email:


PROTOCOL APPROVED - HE2021-0015

 Research Administration System (RAS) <<Do-Not-Reply>>
To Courtney Edworthy

[Reply](#) [Reply All](#) [Forward](#) [...](#)

Wed 3/3/2021 9:00 AM

 The actual sender of this message is different than the normal sender. Click here to learn more.

 Approval Letter.pdf
7 KB

PI: Courtney Edworthy
Advisor:
Protocol or Project Number: HE2021-0015
Protocol or Project Title:
Action Required: [PROTOCOL APPROVED – LOG IN TO RAS TO VIEW THE APPROVAL](#)

The above protocol has been approved. Please ensure you review any conditions of approval.

Please contact the Human Ethics office if you have any questions: humanethics@umanitoba.ca

If you experience an issue accessing the system and require immediate assistance, contact IST Service Desk by either using the [Chat Now](#) service or calling 204-474-8600. For less urgent matters, email a description of the issue to [IST Service Desk](#).

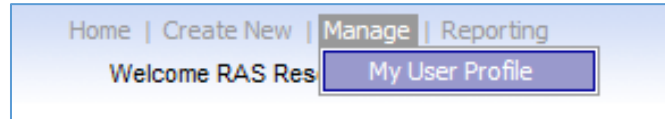
When you receive an email, you can click on the Action Required link and it will take you directly to task you need to complete.

Important: Anyone who is cc'd on a protocol will also receive these email notifications. Its important to remember that only the PI receives the task in the system, meaning the Action Required link will only works for the PI. This is important to note in the event of a "Revise Protocol" email, where there may be a Study Coordinator cc'd. They will need to log into the system and reassign the task if they wish to complete it for the PI.

Managing your User Profile

To Edit the User Profile

1. From the Menu Bar select Manage > My User Profile



2. The User Profile includes 6 tabs:
 - a. Profile
 - b. Contact Info
 - c. Education
 - d. Appointments
 - e. Experience
 - f. Certifications

Important

For UM staff, some fields of your user profile are **non-editable** that are located in the following tabs:

- Profile
- Contact Info
- Appointments

If you need to make changes/updates to information in these tabs:

- Please access your profile page in the Employee Self-Service (ESS) section of VIP (<https://vip.umanitoba.ca/>) where you can make changes
- Please allow 24 hours for the change to be reflected in your Ideate Profile

Remember: If your change is regarding your job title or classification you must contact HR directly at hريس@umanitoba.ca

Profile

Here is where you can view/edit your user profile.

My User Profile

Profile
Contact Info
Education
Appointments
Experience
Certifications

Legal Name: RAS Researcher

Preferred Name:

Salutation (Optional):

Department(s): Medical Microbiology and Infectious Diseases, Business Administration

Interests: [Add](#)

ORCiD:

CV: [Attach](#)

Some fields of your RAS user profile are **non-editable** that are located in the following tabs:

- Profile
- Contact Info
- Appointments

If you need to make changes/updates to these fields:

- Please access your profile page in the Employee Self Service section (ESS) of VIP ([Link](#)) where you can make changes.
- Please allow **24 hours** for the change to be reflected in your RAS profile.

IMPORTANT:

If your change is regarding your **job title** or **classification** you must contact HR directly at hris@umanitoba.ca.

Notice Regarding Collection, Use, and Disclosure of Personal Information by the University
Your personal information is being collected under the authority of The University of Manitoba Act. The information you provide will be used by the University for the purpose of registering and tracking your REB Protocol submission. Your personal information may be disclosed to external members of REB committees for the protocol review. Your personal information will not be used or disclosed for other purposes, unless permitted by The Freedom of Information and Protection of Privacy Act (FIPPA). If you have any questions about the collection of your personal information, contact the Access & Privacy Office (tel. 204-474-9462), 233 Elizabeth Dafoe Library, University of Manitoba, Winnipeg, MB, R3T 2N2.

1. **Legal Name:** The legal name is imported from the UM VIP system; this field cannot be edited.
2. **Preferred Name:** Enter your preferred name here. This will display throughout the entire system.
 - a. **Note:** Your legal name will be displayed on all ethics related Approval Letters
3. **Salutation:** Enter your salutation (optional).
4. **Department(s):** Department(s) are imported from the UM VIP system.
5. **Interests:** This field is not in use currently.
6. **ORCiD:** Add in your ORCiD here (optional). Please note this field does not link to any external system.
7. **CV:** Upload your CV here (optional).

Contact Info

Under Contact Info you can add phone numbers, additional emails and addresses.

My User Profile

Profile
Contact Info
Education
Appointments
Experience
Certifications

Phone Numbers

1

Work:

Cell:

Email Addresses

NOTE: Notifications will go to all email addresses entered in this section

2

Address 1: ▼ Primary Work Email

[Add New Email](#)

Contact Locations

3

Address Type ▼ Primary Work

Address 1

Address 2

Address 3

City

Postal Code/Zip Code

Country ▼

State/Province: ▼

[Add New Address](#)

1. **Phone Numbers:** Enter in your **Work** and/or **Cell** contact phone numbers.
2. **Email Addresses:** Your UofM email address will be the default address listed. However, in the event you have a separate email you also use you can add that here by clicking **Add New Email**. All emails/notifications will be sent to all emails listed.
Important: You can only login to the system with your UM email
3. **Contact Locations:** Enter in your work/office address (optional).

Education

This section is not in use.

Appointments

Appointment information will be automatically populated through an interface with the UM VIP system. If any information here is incorrect, you will need to contact Human Resources.

Experience

This section is not in use.

Certifications

CORE certification is required for all research personnel submitting a Human Ethics protocol. PHIA certificate is only required for PIs and Advisors where PHIA is required for their Human Ethics protocol.

Note: All users must upload their own certificates to their profile prior to the submission of any Human Ethics protocols they are listed on.

My User Profile

Profile
Contact Info
Education
Appointments
Experience
Certifications


Certification	Training Provider	Training Date	Pledge
CORE	TCPS	01/01/2021	View
PHIA	UM	01/01/2021	View


Add Certifications

1. Click Manage > User Profile under the main menu
2. Click on the **Certifications** tab
3. Click on **Add Certification**
4. Enter data as follows:
 - a. **Training Provider:** Type in who provided the training i.e. TCPS-2
 - b. **Attach Pledge:** Click Attach Pledge > Choose File, find the file then and click Upload (Please ensure there are no characters in the file name).
 - c. **Training Date:** Enter in the certification date
 - d. **Lookup Certification:** Select the corresponding Certification from the list i.e. CORE

Add Certification

Training Provider:

Attach Pledge 

Training Date: 

Lookup Certification: [Go](#)

Name	ID
CORE	42
PHIA	43

See video [“How to upload CORE and PHIA Certificates”](#) for more help.

CORE, PHIA & Oath of Confidentiality

Research members are required to upload CORE, PHIA, and an Oath of Confidentiality in certain circumstances. Below is a quick reference table on when each document is required and for which research member on the protocol.

Certification	Protocols required for	Roles required for	Require prior to	Where to upload in RAS
CORE	All Protocols	All Research Personnel	Submission	User Profile
PHIA	Protocols where PHIA is required	PI and Advisor	Submission	User Profile
PHIA	Protocols where PHIA is required	All Research Personnel except the PI and Advisor	Approval	User Profile
Oath of Confidentiality	All Protocols	All Research Personnel except the PI and Advisor	Approval	Research Personnel tab in the Protocol