

ERM Quick Guides

Project Notes and Document Storage form in ERM

Target audience: ERM users who have applicant roles in the ERM system.

Summary

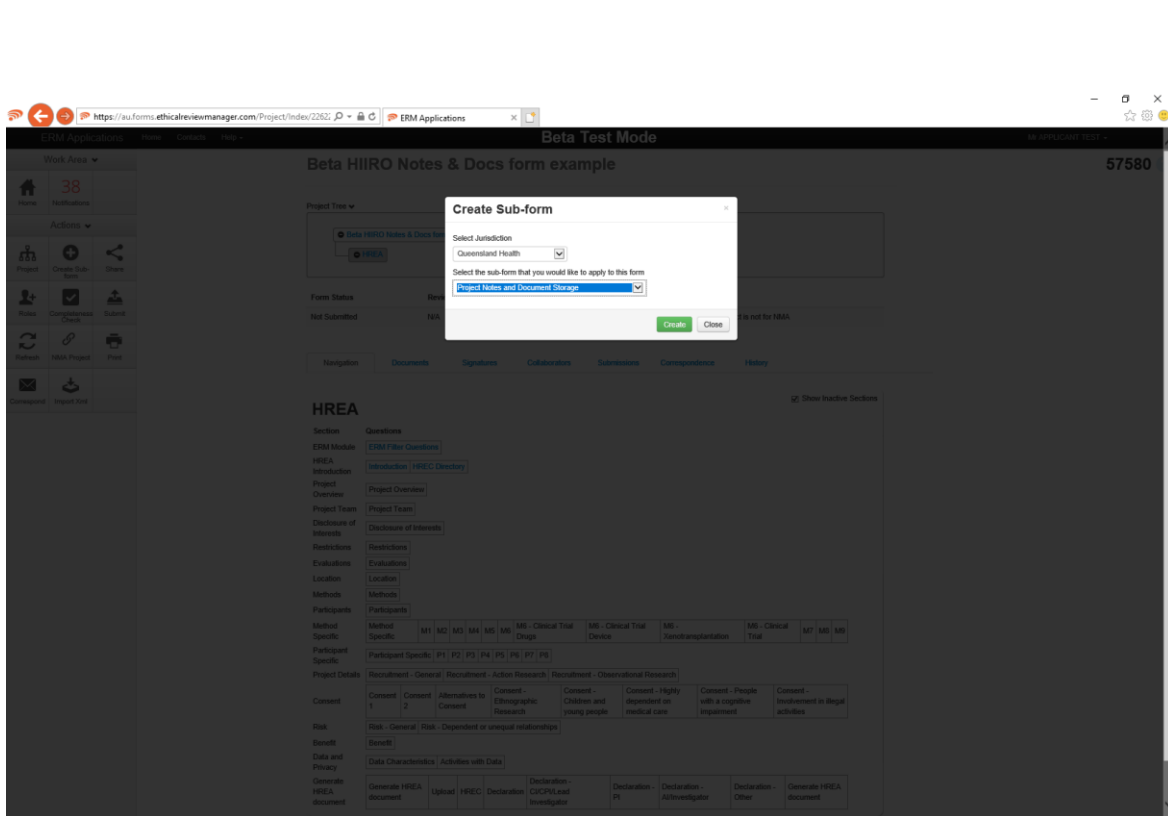
The new ERM form, ***Project Notes and Document Storage***, was implemented on Friday 30 August 2019. This form is a subform of HREA, LNR and MDF and was designed to function as an area for researcher to keep notes such as ORCID numbers and store documents (e.g. HREC approval letters, CVs, etc to share with the project team in ERM).

This form can be shared with any project collaborator but cannot be submitted to or viewed by Ethics Committees or Research Governance.

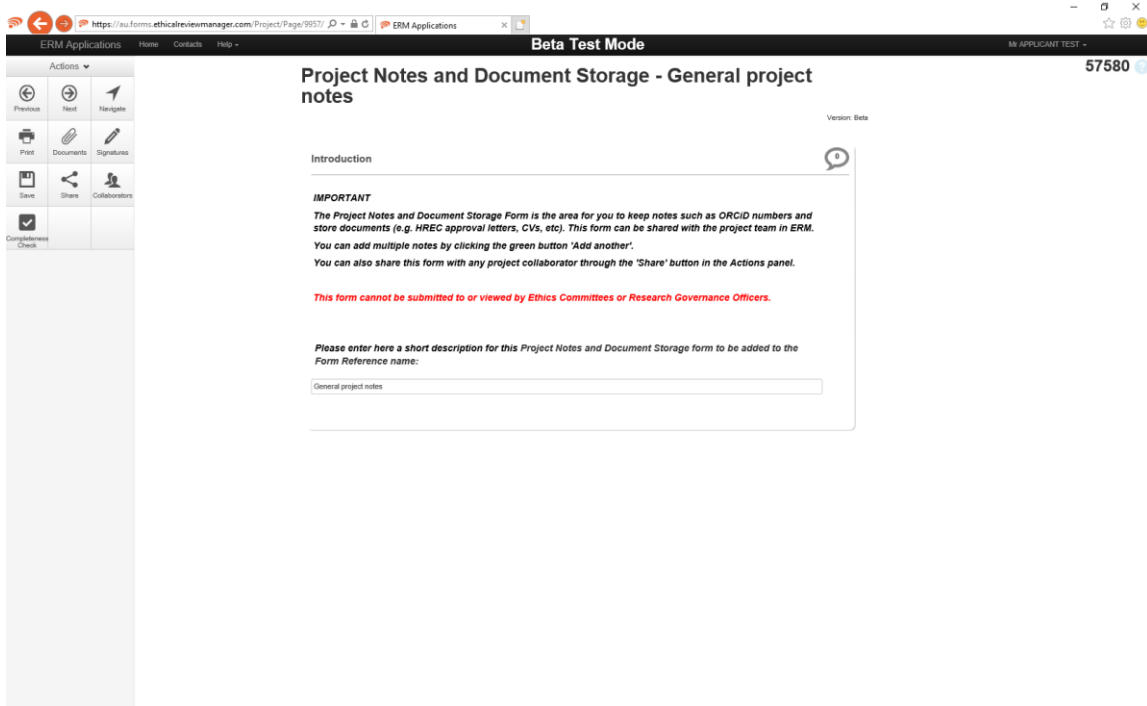
How to create and maintain the form

1. Select the HREA, LNR or MDF form in the project tree
2. Click on '**Create Sub-form**' button in the Actions panel
3. Select '**Queensland Health**' jurisdiction
4. Select the subform '**Project Notes and Document Storage**' and click 'Create' button.

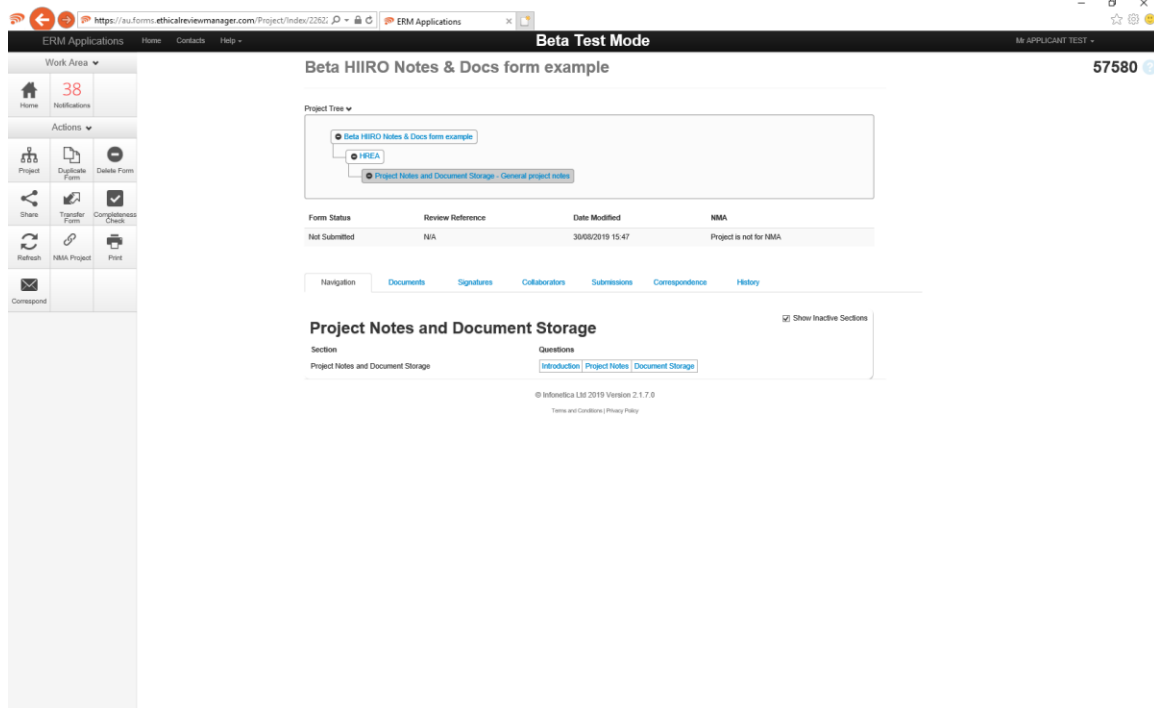




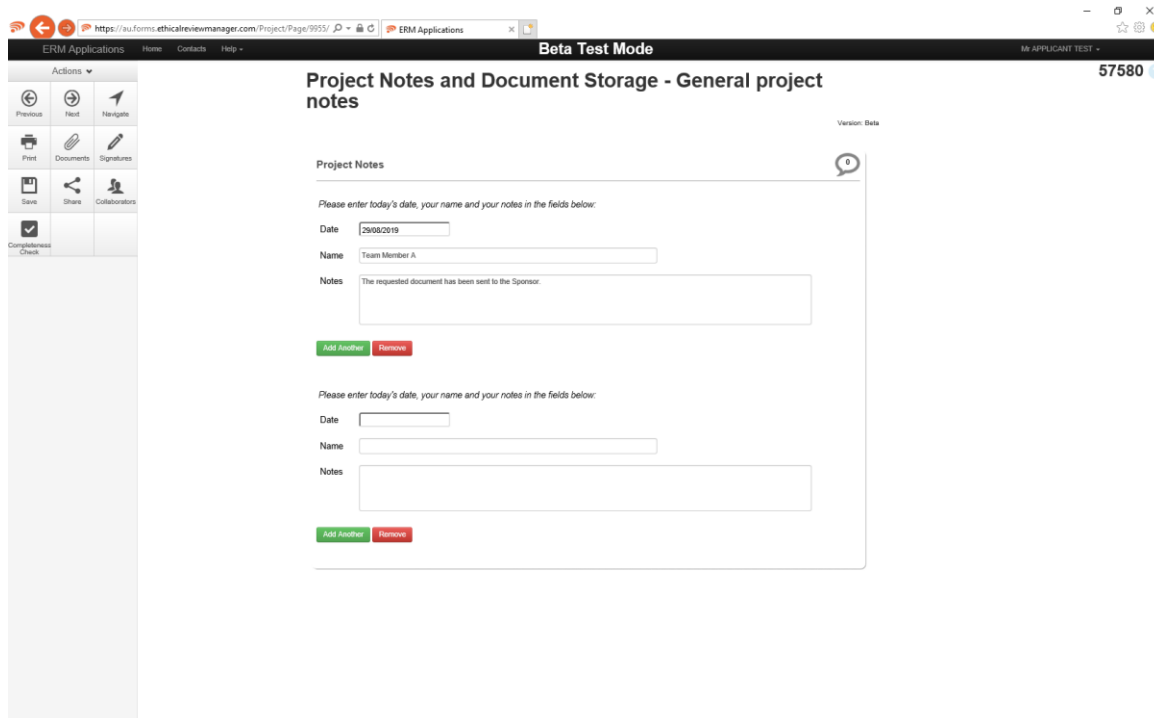
The first page of the form includes an explanation of the form function and a question for the research to enter a short description of the form.



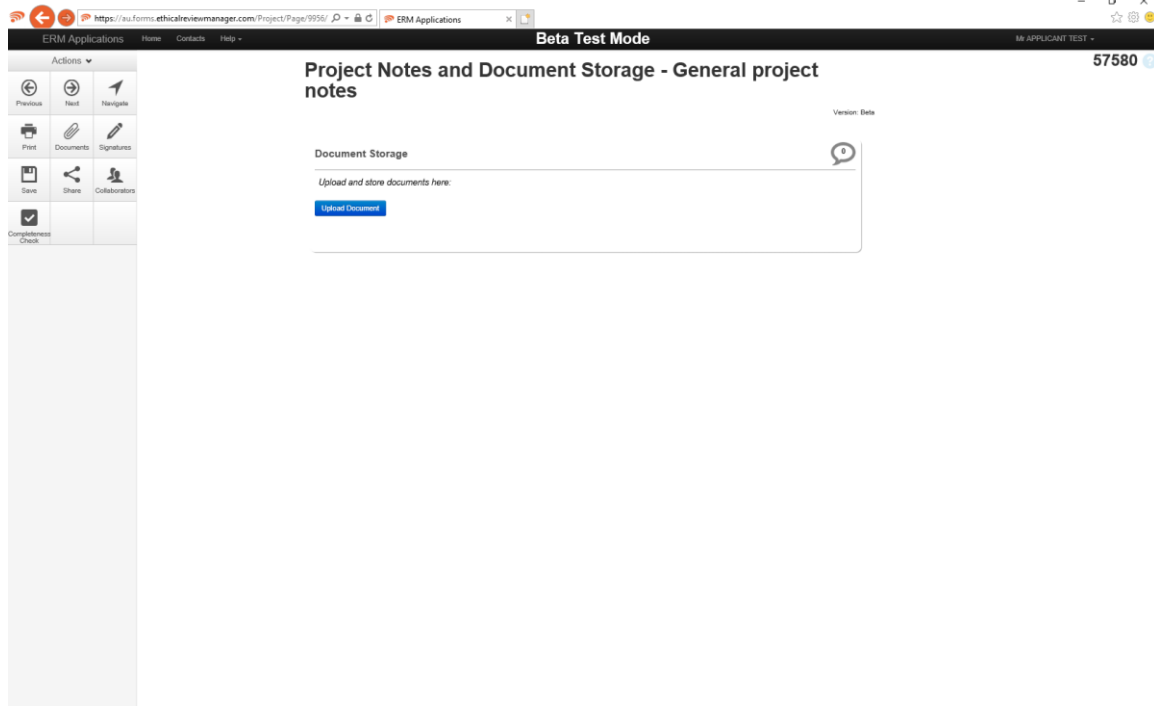
The short description is included in Form Reference name in the project tree to help identify the purpose of the form.



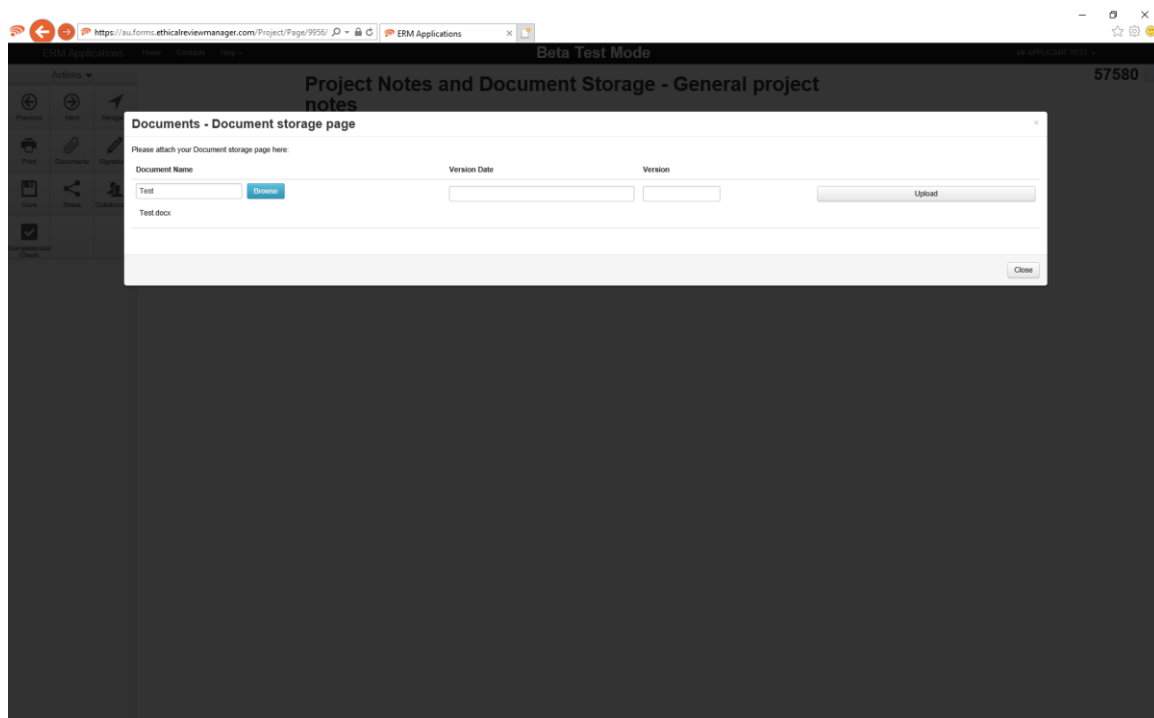
The second page include a repeatable group question where the team member can enter the date, their name and the note text. Multiple notes can be entered in the page.



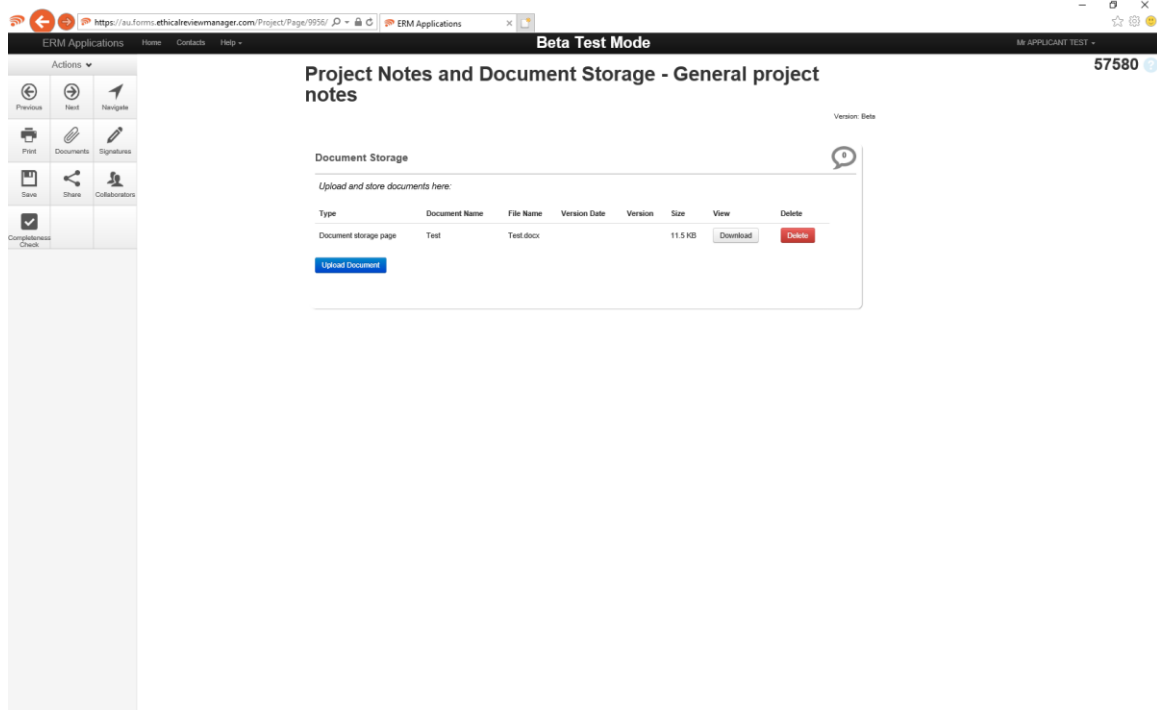
The third page allows the user to upload and store documents in the form through the 'Upload Document' button.



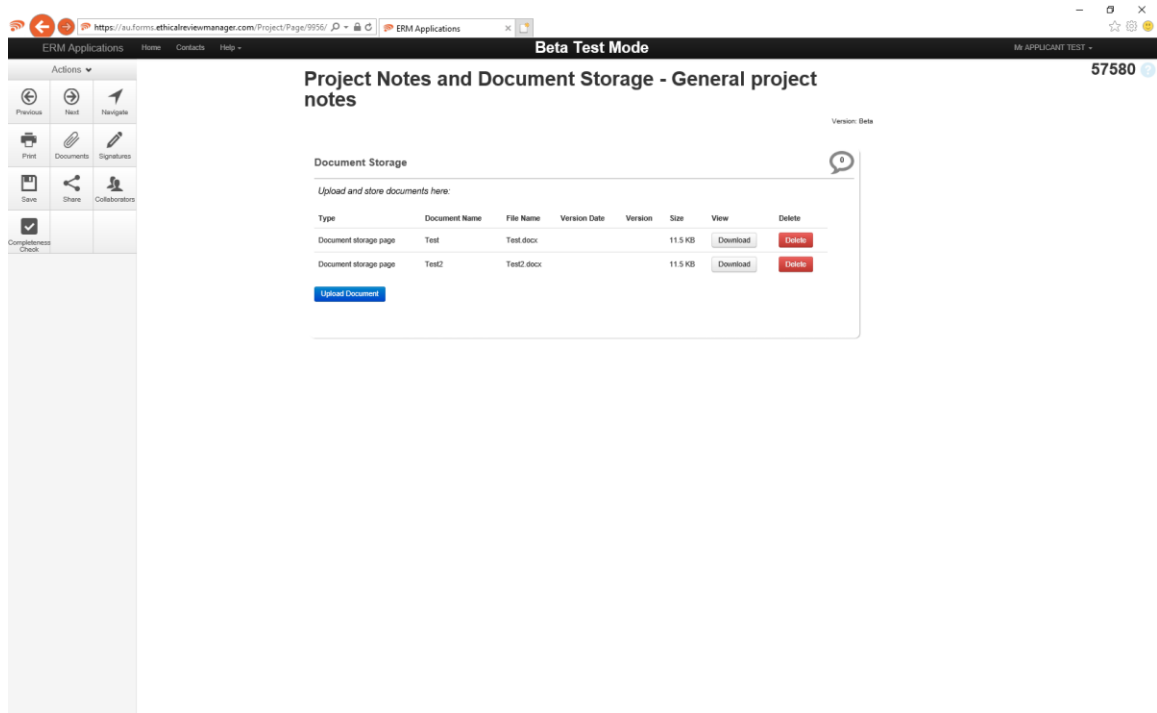
The user can browse and upload a file located in their computer.



Once the file is uploaded into the form it is displays in the Document Storage section



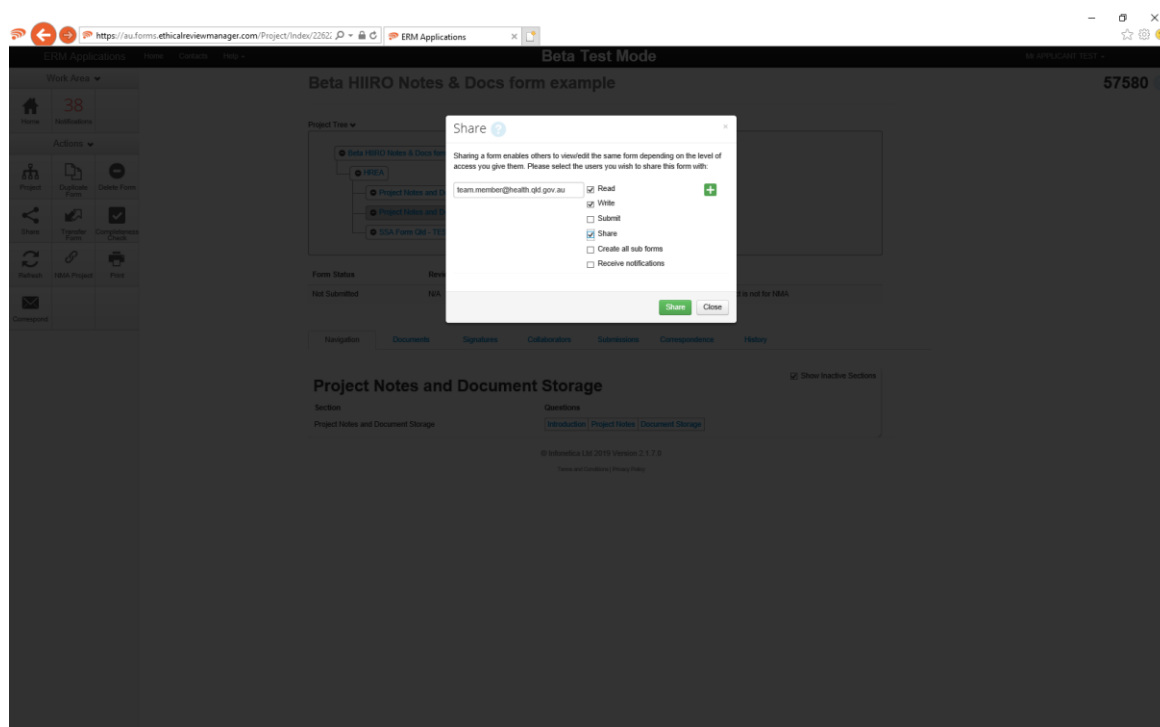
Multiple documents can be uploaded in the Document Storage section. All the uploaded documents can also be downloaded at any time by the team members who the form was shared with.



It is advised that the researcher creates the 'Project Notes and Document Storage' form just after the main form is created to assure the form position in the is just below the main form (i.e. HREA, LNR or MDF).

The form can also be shared at any time by clicking on the 'Share' button located in the Actions panel, typing the email address of the team member (ERM user) who it should be shared with and selecting the appropriate permissions.

Note that only Read, Write or Share will apply to this form.



Read – can read and download documents

Write – can read and update the form including adding and deleting notes and documents

Share – can share the form with other team members

For further information, please contact:

HIRO_REG@health.qld.gov.au

Version 1.2 24 September 2019
