

How to use Roles and Share Roles

Target audience: ERM users and collaborators.

Summary

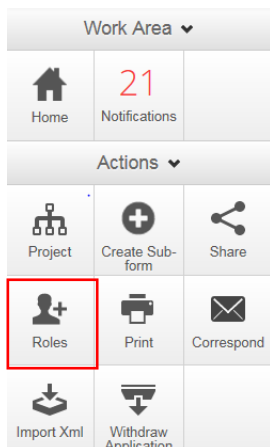
This Quick Guide explains how to assign roles and share the project and forms with the project collaborators.

Roles: Assign access to your project/forms

In ERM, the project owner can make the project available to others e.g. sponsors or colleagues through assigning them a pre-defined role.

When you assign access to the project or a form using the **“Roles +”** button the collaborator will be able to see **all sub-forms** under the form where the role is given.

Select **Roles+** button under the Actions panel



A dropdown list will display the different levels of access to the HREA

- Enter the collaborator's email address and select the level of access

Share Roles x

Sharing a form enables others to view/edit the same form depending on the level of access you give them. Please select the users you wish to share this form with:

Collaborator email

Note: This form has not yet been shared with anyone


HREA Share (read-only) +

- HREA Share (read-only)
- HREA Share (read, write)
- HREA Share (read, create subforms)
- HREA Share (read, write, submit)

Share Role

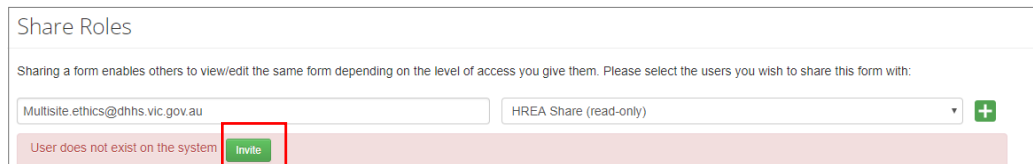
Please refer to the ERM QLD APPLICANT ROLES – PERMISSIONS table at the end of the document for detailed information about the pre-defined roles.

Select **Share Role** button

Other research team members can be added using the  button


If the collaborator does not have an ERM account


- A message will be displayed if the collaborator's email does not exist in ERM




Share Roles

Sharing a form enables others to view/edit the same form depending on the level of access you give them. Please select the users you wish to share this form with:

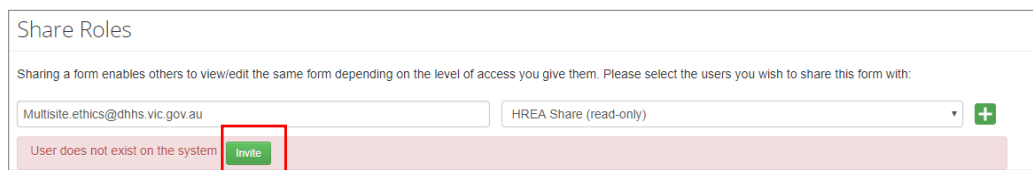
Multisite.ethics@dhhs.vic.gov.au HREA Share (read-only) 

User does not exist on the system 

- Select **Share Role** button
- Other research team members can be added using the  button


Select the **Invite** button to invite the collaborator to create an ERM account


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Share Roles

Sharing a form enables others to view/edit the same form depending on the level of access you give them. Please select the users you wish to share this form with:

Multisite.ethics@dhhs.vic.gov.au HREA Share (read-only) 

User does not exist on the system 

Select the **Invite** button to invite collaborator to create an ERM account

The collaborator will receive an email notification inviting them and a link to ERM to create an account

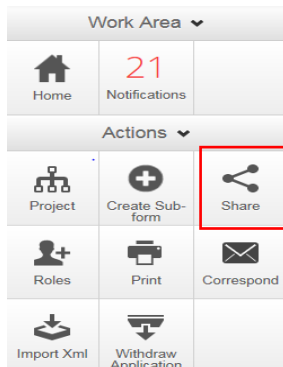
NOTE you can amend collaborator permissions see **Manage Collaborator Permissions**

[Sharing: Assign access to your project/forms](#)

Using the **Share** function, the project owner or form owner (creator of the form) can share a form with other research team members.

When you assign access to the project or a form using the **“Share”** button the collaborator will be able to see **only form where the role is given**.

Select **Share** button under the Actions panel



Enter the collaborator's email address and select the level of access

A screenshot of a 'Share' dialog box. The title bar says 'Share' with a question mark icon and a close button. Below the title bar, there is a text input field labeled 'Collaborator email'. To the right of the input field is a list of checkboxes for permissions: Read, Write, Submit, Share, Create all sub forms, and Receive notifications. A green '+' button is positioned to the right of the 'Read' checkbox. At the bottom of the dialog, there are two buttons: 'Share' (green) and 'Close' (grey).

- **Read** – view application (but not edit)
- **Write** – view and edit application
- **Submit** – submit application (on behalf of CPI/PI)
- **Share** – ability to share application with other collaborators on behalf of the CPI/PI
- **Create all sub forms** – create reports relevant to this application
- **Receive notifications** – refers to notifications displayed on ERM homepage

Please note if a form has been shared through multiple levels of people for each level there will be multiple levels of share permissions to selected. For example, Project owner shared with PI who then shared with an associate investigator who wants to now wants to share with a second associated investigator.

They will need to tick all three read options in the share to enable the second associate investigator to be able to read the forms.

Manage Collaborator Permissions

The project owner and investigators with access to share the project with others, can edit the permissions of collaborators

- Open the relevant application, then click Collaborators

Form Status	Review Reference	Application Type	Date Modified	NMA
Submitted	HREC/2019/DEF/50896 (Jan ver 1)	Ethics Application	23/01/2019 10:06	Project is not for NMA

Navigation: Documents Signatures **Collaborators** Submissions Correspondence History

Collaborators

Name	Access	Edit Permissions
Ms Louise Knop	Project Owner and Form Owner	Edit Permissions Edit Permissions

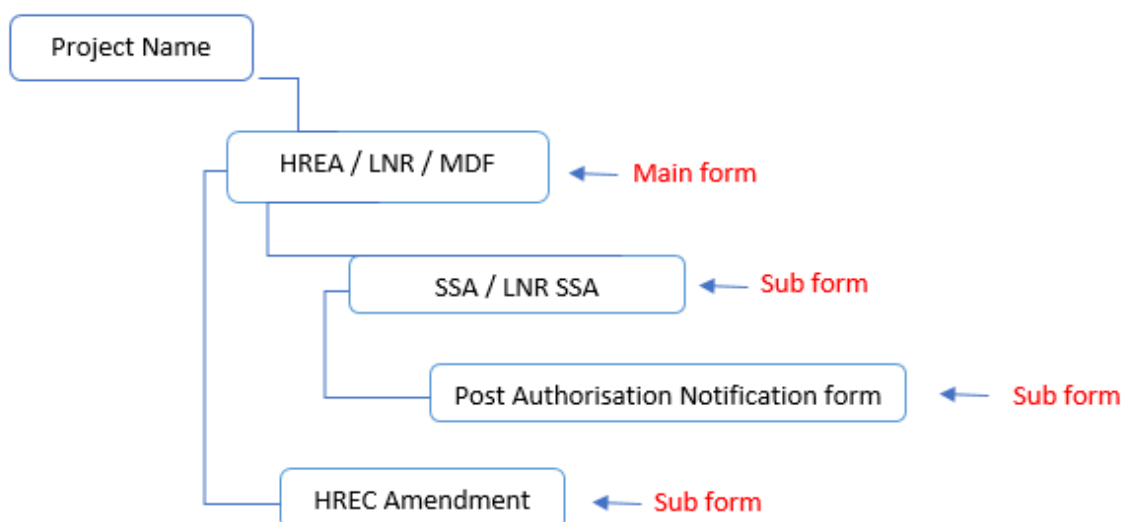
- Click Edit Permissions on the righthand side of the relevant investigator.
- Select/de-select the relevant share options. Click Save

ERM Form Architecture

ERM is based on **forms**. The project title layer is automatically created at the same time the applicant creates a **main form**.

From the **main form**, the applicant can create **sub-forms** e.g. SSA form, progress report.

From some sub-forms (SSA and LNR SSA) further sub-forms can be created e.g. site progress report, complaints report and site notification form



Main Forms (There is only one main form for each project.)

Form	Description
Human Research Ethics Application (HREA)	Ethics application form
Low/Negligible Risk Application Form (LNR)	Ethics application form for low or negligible risk research
Minimal Dataset Form (MDF)	Proxy for an ethics application form; used when the ethics review was performed in a state/territory that does not use ERM; allows creation of SSA form(s) in ERM

Sub-forms for post-approval HREC

Form	Description
HREC Amendment QLD	Request ethical approval for a change to the design or conduct of a research project e.g. the protocol, PICF or change to personnel
Project Final Report QLD	Report to the reviewing ethics committee on the progress of a research project at the time of its completion
Safety Report QLD	Report a safety event to the reviewing ethics committee
Annual Safety Report QLD	Report to the reviewing ethics committee on the safety profile of an interventional clinical trial
Serious or Suspected Breach Report	Report a serious or suspected breach to the reviewing ethics committee
Site Closure Report Multi Centre Research QLD	For a multi-site project, report the closure of one participating site to the reviewing ethics committee

Sub-forms for initial application Main Form (site specific)

Form	Description
QLD Site Specific Assessment (SSA)	Research governance application form; one SSA is required for each site participating in a research project

Low/Negligible Risk Site Specific Assessment (LNR SSA)	Research governance application form; one LNR SSA is required for each site participating in a research project
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Sub-forms for Post Authorisation (RGO)

Form	Description
SAE/SUSAR/SADE Rpts	Report SAE/SUSAR/SADE to the site's research governance office
Post Authorisation Notification Form	Report a research project amendment to the site's research governance Office

ERM QLD APPLICANT ROLES - PERMISSIONS

Note: Permissions only apply to forms down the branch and up the tree from the form where it is given.

APPLICANT ROLE	Column1	DESCRIPTION
*Full Project (read only)	HREA DM HREC MDF DM MDF LNR Form	This role allows the recipient of the role to only read all forms in the project. No other access is allowed.
*Full Project (read, subforms)	HREA DM HREC MDF DM MDF LNR Form	This role allows the recipient of the role to read, and create subforms in all QLD in all project forms and subforms (except some data migrated forms).
*Full Project (read, write, subforms, share)	HREA DM HREC MDF DM MDF LNR Form	This role allows the recipient of the role to read, write (edit), share, create subforms and receive notifications in all QLD project forms and subforms (except some data migrated forms).
*Full Project (read, write, subforms, share, submit)	HREA DM HREC MDF DM MDF LNR Form	This role allows the recipient of the role to perform the same actions as the Project Owner, full access (read, write, submit, share, create all sub forms, receive notifications), in all project forms and subforms (except some data migrated forms).
*Main forms (read only)	HREA DM HREC MDF DM MDF LNR Form	This role allows the recipient of the role to only read the QLD main forms. No access is given to the subforms of the main forms.
*Main forms (read, subforms)	HREA DM HREC MDF DM MDF LNR Form	This role allows the recipient of the role to read and create subforms in the QLD main forms. No access is given to the subforms of the main forms.
*Main forms (read, write, subforms, share)	HREA DM HREC MDF DM MDF LNR Form	This role allows the recipient of the role to read, write, share, create all subforms, receive notifications in the QLD main forms. No access is given to the subforms of the main forms.
*Main forms (read, write, subforms, share, submit)	HREA DM HREC MDF DM MDF LNR Form	This role allows the recipient of the role full access (Read, Write, Submit, Share, Create all sub forms, Receive notifications) in the QLD main forms. No access is given to the subforms of the main forms.

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<p>*Subforms (read, write, subforms.share.submit)</p>	<p>LNR Form HREC Amendments Qld Safety Report Form Qld Annual Safety Report Qld Project Progress Report Qld Site Closure Report Form Multi Centre Research Qld Project Final Report Qld Breach - Serious or Suspected - Report Form (HREC) Qld Amendments, Reports & Notifications (HREC) RED HREC Post Approval SSA Form Qld SSA MDF (all versions) LNR SSA</p>	<p>This role allows the recipient of the role to have full access (read, write, submit, share, create all sub forms, receive notifications) in the subform where it is given and all subforms of this form (except some data migrated forms). Read and create subforms are allowed in the main forms. Note: Permissions only apply to forms down the branch and up the tree from the form where it is given.</p>
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For further information, please contact:

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