

Changes in Your User Experience

In November 2016, some upgrades are being implemented to the Researcher Portal. These upgrades are intended to improve your experience in the Researcher Portal and to reduce potential data loss and re-work.

You may notice a few changes while using the Researcher Portal after implementation. This document will point out some of those changes as well as remind you of some helpful tips for using the Researcher Portal.

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Changes in the Researcher Portal

Change: Role Blocks

Role blocks (PI, Team Member, Reviewer, etc.) now display as menu items you can expand and contract. This allows you to focus on the role block relevant to what you want to do in the portal.

Old view:

| | |
|--|---|
| <p>Role : Principal Investigator</p> <p>Applications (Saved - Not Submitted) (0)</p> <p>Applications (Submitted - Requiring My Attention) (0)</p> <p>My Reminders (0)</p> <p>Applications (Submitted - Under Review) [Click here...]</p> <p>Applications (Submitted - Post Review) [Click here...]</p> <p>Applications (Withdrawn) [Click here...]</p> | <p>Role: Project Team Member</p> <p>Applications (Saved - Not Submitted) (0)</p> <p>Applications (Submitted - Requiring My Attention) (0)</p> <p>My Reminders (0)</p> <p>Applications (Submitted - Under Review) [Click here...]</p> <p>Applications (Submitted - Post Review) [Click here...]</p> <p>Applications (Withdrawn) [Click here...]</p> |
| <p>Role: Faculty Signing Authority</p> <p>Applications (New - for Review) (0)</p> <p>Applications (Pending Requested Information) (0)</p> <p>Applications (Submitted - Under Review)[Click here...]</p> | <p>Role: Reviewer</p> <p>Applications Requiring Your Review as a Chair (0)</p> <p>Applications Requiring Your Review as a Reviewer - New (0)</p> <p>Applications Requiring Your Review as a Reviewer - In Progress (0)</p> <p>Events Requiring Your Review as a Chair (0)</p> <p>Events Requiring Your Review as a Reviewer - New (0)</p> <p>Events Requiring Your Review as a Reviewer - In Progress (0)</p> |

New view:

The screenshot shows the new Researcher Portal interface. At the top, there is a navigation bar with the text "Powered by Process Pathways | Product Info" on the left and "Welcome: John Doe | Home | My Profile | Contact Us | Help | Logout" on the right. Below this is a header banner with the Memorial University logo on the left and the text "Memorial Researcher Portal" in the center. Below the banner is a navigation bar with "BACK TO HOME" on the left and "APPLY NEW | News | Useful Links" on the right. The main content area features a list of role blocks, each with a dropdown arrow on the right:

- Role: Principal Investigator (expanded, showing a list of links: Applications: Drafts, Applications: Requiring Attention, Applications: Under Review, Applications: Post-Review, Applications: Withdrawn, Events: Drafts, Events: Requiring Attention, Reminders)
- Role: Project Team Member
- Role: Faculty Signing Authority
- Role: Reviewer

You will notice some slight changes to the order and naming of the links under your PI and Team Member role blocks:

| Old link | New link | Comment |
|---|-----------------------------------|-------------------------|
| Applications (Saved – Not Submitted) | Applications: Drafts | Same functionality |
| Applications (Submitted – Requiring My Attention) | Applications: Requiring Attention | Same functionality |
| Applications (Submitted – Under Review) | Applications: Under Review | Same functionality |
| Applications (Submitted – Post Review) | Applications: Post-Review | Same functionality |
| Applications (Withdrawn) | Applications: Withdrawn | Same functionality |
| N/A | Events: Drafts | New! See Change: Events |
| N/A | Events: Requiring Attention | New! See Change: Events |
| My Reminders | Reminders | Same functionality |

Change: Events

Before this upgrade, if you needed to make changes to an Event form (such as an Ethics Renewal or Annual Update), you had to complete a new Event form.

Now, you can revise Event forms, similar to how you can edit applications when revisions are required. This allows the ethics office to “push back” forms to you for changes. This improvement will help researchers minimize redundant efforts in having to recreate forms.

You will now see two new links under your PI and Team Member role blocks:

- Events: Drafts
- Events: Requiring Attention

When you need to complete an Event form, you will initiate it as you have before, through the Applications: Post Review screen.

However, once you save your draft of an Event form (REMEMBER: save frequently to avoid data loss), you can access the drafted Event form via the Events: Drafts link. This link will take you to a list of available applications. Choose the relevant application and click Events.

The screenshot shows the Researcher Portal interface. At the top, there are two role-specific navigation menus:

- Role: Principal Investigator**
 - Applications: Drafts
 - Applications: Requiring Attention
 - Applications: Under Review
 - Applications: Post-Review
 - Applications: Withdrawn
 - Events: Drafts** (highlighted in red)
 - Events: Requiring Attention
 - Reminders
- Role: Project Team Member**
 - Applications: Drafts
 - Applications: Requiring Attention
 - Applications: Under Review
 - Applications: Post-Review
 - Applications: Withdrawn
 - Events: Drafts** (highlighted in red)
 - Events: Requiring Attention
 - Reminders

Below these menus is a table of applications. The table has columns for File No, Project Title, Principal Investigator, Application Type, Status Snapshot, and Workflow Message. The first row shows a project titled "Test Project" by "Dr. John Doe (Research Units)". The "Events" button in the first row is highlighted in red.

Also, if changes need to be made to your Event form after submission, the form will be available using the Events: Requiring Attention link.

Change: Highlighted Links

To help you know when you have an application or form requiring attention or a reminder in the Researcher Portal, the relevant link will turn red to notify you.

Below are three examples.

An application requiring attention:

The screenshot shows the navigation menu for a Principal Investigator. The menu items are:

- Applications: Drafts
- Applications: Requiring Attention*** (highlighted in red)
- Applications: Under Review
- Applications: Post-Review
- Applications: Withdrawn
- Events: Drafts
- Events: Requiring Attention
- Reminders

Below this menu are other role-specific sections: Role: Project Team Member, Role: Faculty Signing Authority, and Role: Reviewer.

A reminder for an ethics renewal:



A new review under the Reviewer role block:

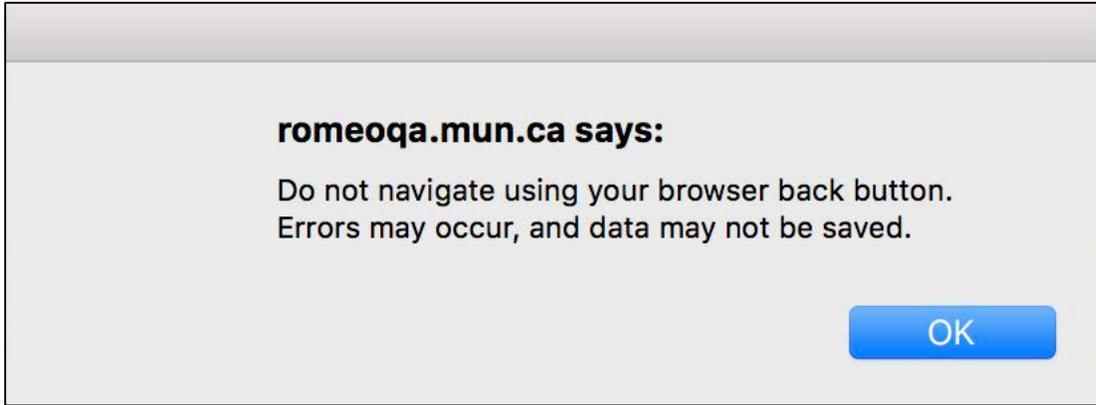


Change: Disabling of Brower Back and Forward Buttons

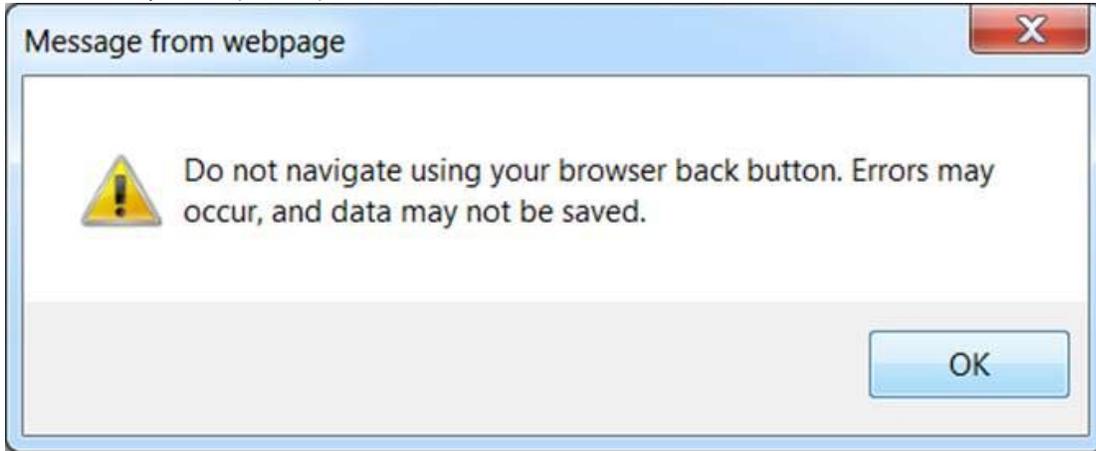
The Researcher Portal is designed to be navigated solely using the links and menus in the portal. Use of the browser navigation buttons (the Back and Forward buttons) can cause problems in the portal, including data loss.

After the upgrade, users cannot use the browser navigation buttons and must use the menus and links in the portal. If researchers click on the browser navigation buttons, they will see an error message similar to the following examples:

Chrome (on Mac)



Internet Explorer (on PC)



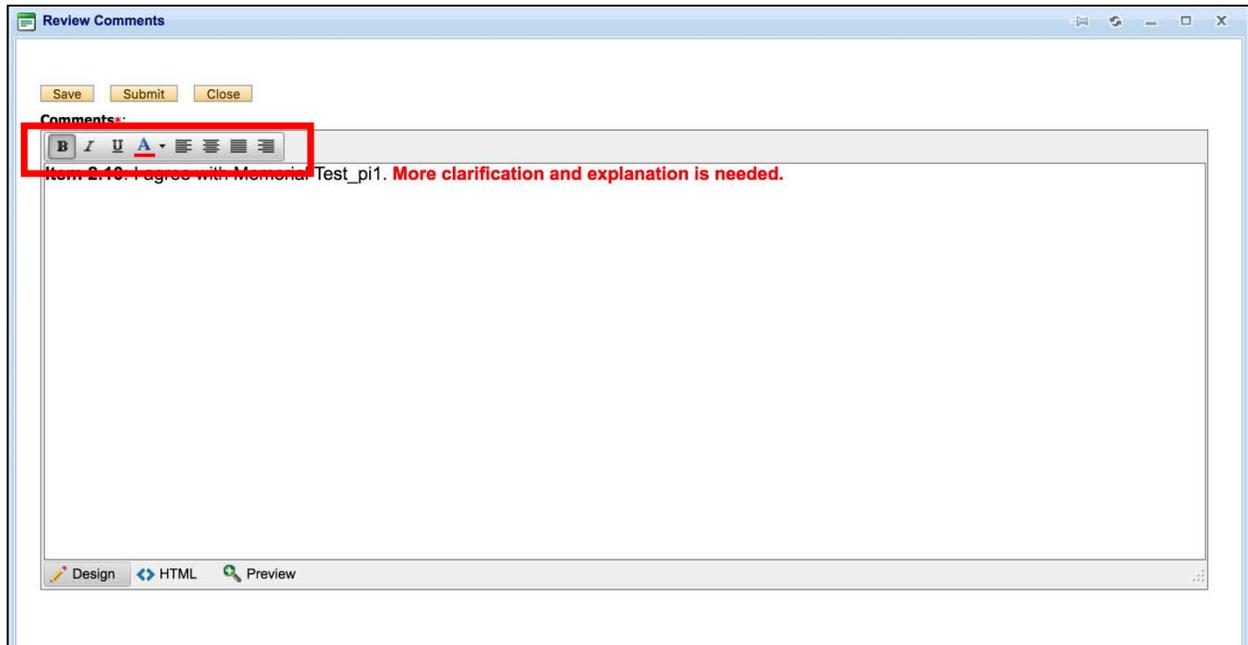
Firefox (on PC)



This change is intended to minimize data loss due to unsupported navigation through the portal.

Change: Text Formatting for Reviewers (Reviewers Only)

Reviewers are now able to use some text formatting tools in their reviewer comments. Text can have styles and colors applied, and text alignment can be changed.



Formatting applied by Reviewers is maintained when Reviewers submit their reviews, meaning that other reviewers can see the formatting as can administrative users at the ethics offices.

This change allows Reviewers more flexibility in drawing attention to aspects of their feedback through formatting.

Helpful Tips for Avoiding Data Loss and Errors

- **Save often!** You never know when an internet connection or power outage might knock you out of the Researcher Portal. Saving your work frequently while you are in a session will help minimize any work lost.
- **Save often (again) and log off.** The Researcher Portal will log you out due to inactivity. Unfortunately, *there is no notification that you have timed out of the system*, even though you are no longer in an active session. For this reason, save often (see the first bullet above) and log out if you are taking a break from your work. These steps should

reduce data loss and also help avoid a Team Member being locked out of an application or form.

- **Only have ONE session of the Researcher Portal open at a time.** Multiple open sessions confuse the system because it does not know which open session is the “real” one. Having multiple open sessions can cause data loss and/or errors.
- **Avoid the < > symbols in your text responses.** These symbols are not supported, and they cause issues with saving the application or form, often with data after the symbols not being saved in the system at all.
- **Click on Home in your Top Navigation Menu to return to the main page.** Clicking Home allows you to return to the main page of the Researcher Portal and to access any of your role blocks. As always, remember to save your work before navigating away from an open application or form.