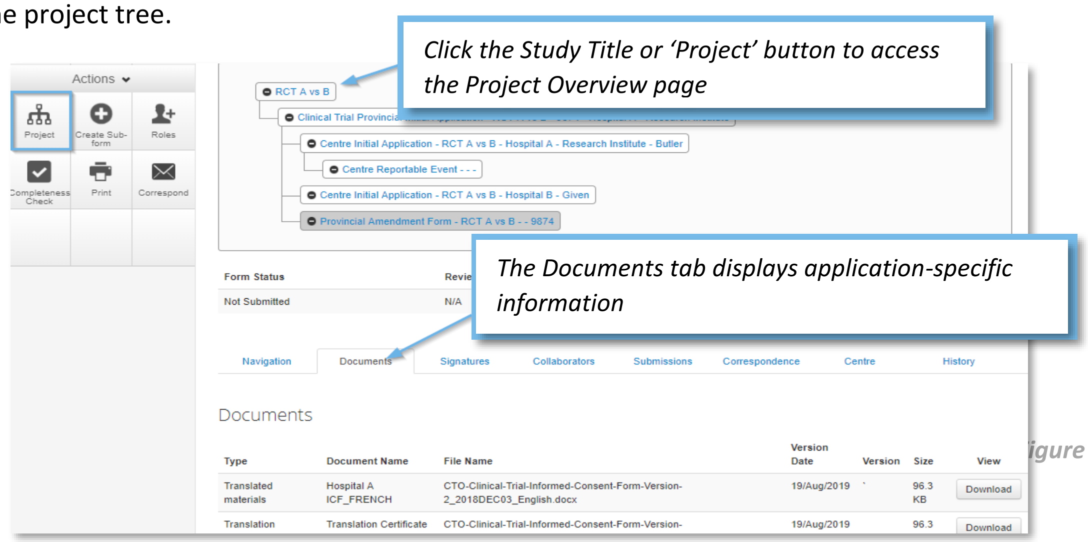
QuickGuide: Project Overview

When looking at the project tree for a study in CTO Stream, the form currently selected in the tree appears highlighted in grey. Underneath the project tree are 8 different tabs that provide different types of information about the selected form. An example of one of these tabs is "Documents"(*Figure 1.0*), which contains a table of all the documents which have been uploaded to the form. The documents tab, and all 7 other tabs show **application-specific information** about the form highlighted in the project tree.

It is also possible to view project-wide information by going to a separate page called, the **Project Overview** page, which is accessible by pressing the 'Project' action button in the Actions Menu or clicking the study title at the top of the project tree.



igure 1.0

The **Project Overview** page also shows the project tree and has 6 tabs located underneath the tree which display **project-level information.** The Forms tab is shown below (*Figure 2.0*), along with four additional tabs called: Submitted Documents, Transfers, Centres, History and Project Documents*. These tabs encompass information about the <u>entire project</u>, instead of the application-specific information. These five tabs are described in the table below. Each tab contains a keyword Search bar and each column within the tabs can be sorted.

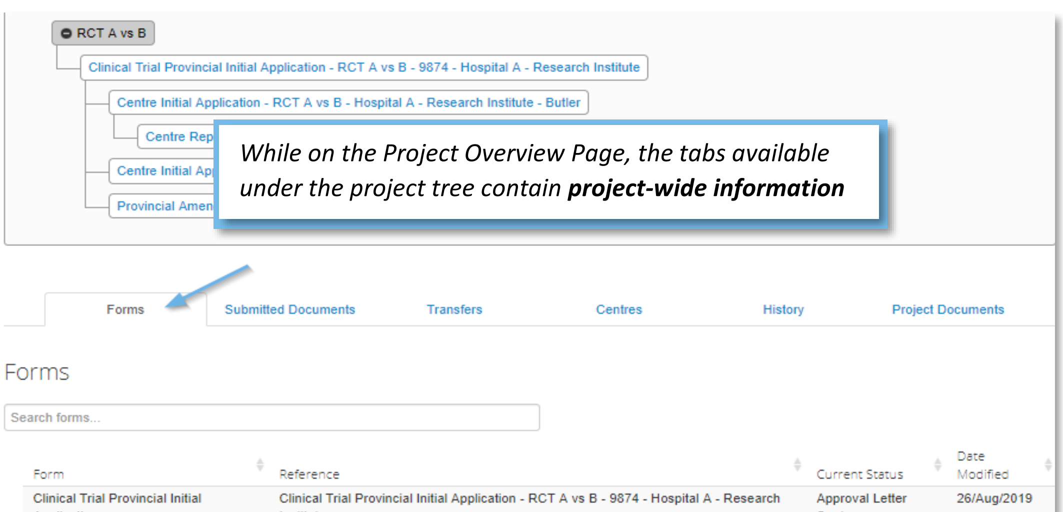


Figure 2.0

Tab Name	Description and features	Available Information
Forms	Displays all application forms associated with the study. Clicking on the row will take you to the application workspace. Search bar enables users to search for a specific form.	**Form** – displays the name of the form **Reference** – displays Form Reference information including the name, type of form and centre name (if applicable) **Current Status** – displays the current status of the form in the REB review process **Date Modified** – displays the date of the last change made to the form
Submitted Documents	Displays all documents which have been submitted to the REB.	**Form Reference** –displays the name of the form which the document was uploaded to (as it appears in the project tree) **Form Name** –displays the type of application the document was uploaded to (i.e., Provincial Amendment) **Submission Date** – displays the date of submission of the listed form **Status** – displays the status of the application form that the document was uploaded to **Type** –displays the category the document belongs too **Name** – displays the name of the document **Version** –displays the version number of the document **Size** –displays the disk space size of the document **View** – button allowing user to download document to computer **Archived** – displays whether the document has been archived by the REB (replaced by subsequent document or submission).
Transfers	Displays transfers of project ownership which have been initiated on the project, along with related information.	**Transfer ID** – displays unique ID assigned for tracking purposes to each transfer request in CTO Stream **From User** – displays the user who initiated the transfer **To User** – displays the user who will receive the transfer request **Requested Date** – displays the date the transfer was initiated **Status** – displays the status of the transfer (Requested, Accepted or Rejected) **Response Date** – displays the date the "To User" responded to the transfer request **Action** – allows a pending transfer request to be canceled by the "From User"
Centres	Displays a list of all participating sites involved in the study and the status of	**Centre Name** – displays the name of the participating site

Tab Name	Description and features	Available Information
	ethics approval, the expiry date and name of site Principal Investigator.	**Status** – displays the status of ethics approval at the participating site (e.g., Approved, Suspended, Expired) **Expiry Date** – displays the ethics expiry date for the site, once the CIA for the site has been approved **Contact** – displays the name of the Principal Investigator listed in the CIA for the participating site
History	Displays a complete listing of everything that has occurred in the project since the project was created (in chronological order). Examples include form submissions, project transfers or status changes during the REB review process.	**Date** – displays the date the event occurred **Form Reference** – displays the name of the form in which this event occurred **User Name** – displays the user who initiated the action **Description** – displays information about the event and what actions occurred **Attachment** – displays a direct link to download any forms or letters associated with the event - by clicking the Download button, the document will open in pdf format and be downloaded to your computer.
Project Documents	Displays a list of the currently approved/acknowledged documents for the project. (i) new documents will appear as they bcome approved/acknowledged; (ii) documents are removed from this table when a newer version of the document is approved/acknowledged and the previous version is superseded.	**Document Name** – displays the name of the document **Document Date** – displays the version date of the document **Document Version** – displays the version number of the submitted document **Document Category** – displays if document will be approved, acknowledged, or received **Download Document** – by clicking 'Download' button a document will be open in the pdf format and downloaded to your computer **Document Type** – displays the document type within CTO Stream **Centre Name** – displays name of the Centre Organization

Questions?
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