# QuickGuide: Creating a New Project

This QuickGuide outlines steps for creating a new project within WesternREM.

To create a new project:

Getting Started

1. Log into WesternREM:
   Western-only studies - https://applywesternrem.uwo.ca
   Lawson studies - https://www.westernlawsonresearch.ca

2. Click on '**Create Project**' from the **Actions Toolbar** and enter the following information:
   a.) Project Title.
   - Enter your short title (fewer than 200 characters).
     o This title will be used to access your file from the **Project Menu**.
   b.) Main Form
   - Select the appropriate REB application:
     - Health Sciences Research Ethics Board (HSREB), or
     - Non-Medical Research Ethics Board (NMREB).
       *NOTE: If you are unsure what board to submit to, contact the Office of Human Research Ethics.
   c.) Centre
   - Select the appropriate Centre with whom you are affiliated.
     o For more information on whether or not you meet the Lawson approval criteria, go to: https://www.westernlawsonresearch.ca/
   d.) Provide Access to the OHRE
   - You will be asked to confirm that the form can be shared with the OHRE.
     *NOTE: you must agree to this before beginning your application. This will allow the Office of Human Research Ethics to access your project, if needed, and provide you with support and assistance.

3. Click '**Create**'

4. In the **Navigation** tab under **Section 1** begin by answer the first set of questions.
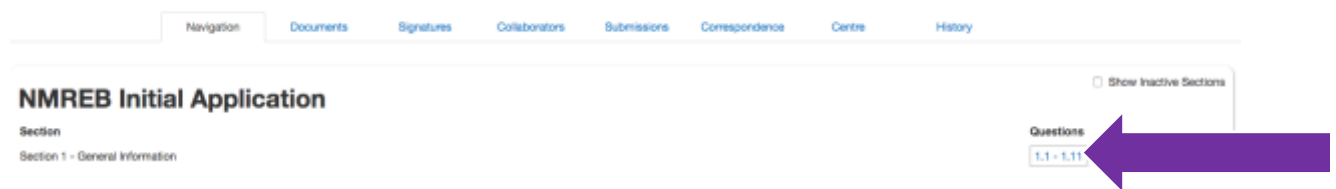
*NOTE: For all submissions (except your Response to REB recommendations) choose '**Initial Submission**' in **Question 1.1.**

Adding the PI and Additional Study Personnel

5. To add the PI or additional study team members in **Section 1.2** or **Section 1.3** follow the **two-step** process below:

    1. Click on the box at the top of **Section 1.2** or **Section 1.3** that says **Search User** and begin typing the name of the person that you wish to add. Once you find them, click on their name and they will be added into the form.
    2. Click on the **Roles** tile in the **Actions Toolbar**. Enter the email address of the person you wish to add. Choose a role for that person by clicking the dropdown menu beside their email address. Click **'Share Role'.**

        *NOTE: You can change the permissions of those who have a Role in the project by clicking on the **Collaborator** tab in the **Actions Toolbar.**

Documents

6. When you come to a question in the form which has a blue '**Upload Document**' button within the question, you can then upload the document associated with that section.
    - Clicking on the **'Upload Document'** button will prompt you to upload your documents:
        i.   Browse your computer for the document you wish to upload.
        ii.   Provide a version date.
        iii. Provide a version number.
        iv.   Click "**Upload**".

        *NOTE: In some questions this will not appear until you prompt it by answering the question. Please be sure to work through the form in sequential order to ensure that no questions are missed.

Submitting and Signing

7. Once you have completed all of the required questions for your application you can then check to ensure that your project is complete by clicking the **Submit** tile or the **Completeness Check** tile in the **Actions Toolbar.**

8. If the application is complete you can then do one of the following:

   a. If you are the PI you can sign the application by clicking the blue **Sign** button on the last page of the application. You will be prompted to enter your **Username** and **Password** and click **Sign**.
   b. If you are not the PI you can request the signature of the PI by clicking the **Request Signature** button on the last page of the application. You will be prompted to enter the PI's **Email Address** and click **Sign**.

   *NOTE: Once all of the signatures have been signed then the project will be automatically submitted.

Additional Information

1. **Comments -** any user who has access to the application forms can add comments to other users. To add a comment, click on the comment bubble icon at the top right hand corner of each question.
2. **Help Text -** some questions within WesternREM have associated help texts. To view the help text click on (i) icon in the top right hand corner of each question.
3. **Previous / Next / Navigate** – these three tiles on the left hand side in the **Actions Toolbar** will navigate you through the project and auto-save when pressed.
4. **Mandatory Questions -** all questions marked with an asterisk (*) must be answered.
5. **Smart Form -** it is advised to work through the form in chronological order as it is a smart form and questions may appear or disappear depending on the answers you provide.

Questions?
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