Western Research

WesternREM (WREM)

Applicant

Online User Guide: Getting Started

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1. ABOUT WesternREM

The new system was purchased from Infonetica Ltd., which specializes in research management, ethics management, ethics approval and compliance training solutions. The system we are calling Western Research Ethics Manager (WesternREM) is a web-based electronic platform for conducting research ethics reviews and is built using modern infrastructure that exhibits a vast set of features, while maintaining an easy-to-use interface.

Since 2015, the Health Sciences REB has used this system for multi-centre clinical trial studies submitted through Clinical Trials Ontario (CTO), for which Western's HSREB acts as the REB of record. CTOs system, CTO Stream, has been developed in partnership with Infonetica. This continued relationship ensures WesternREM and CTO Stream will be continuously monitored and maintained to meet the needs of researchers and REBs.

1.1. Target Audience

This guide is intended for all WesternREM Users and will provide useful information on how to create an account and navigate the online application system.

1.2. Internet Settings

WesternREM supports the latest versions of the following browsers:

- Microsoft Internet Explorer
- Mozilla Firefox
- Google Chrome
- Apple's Safari

WesternREM uses pop-ups. You will need to configure your browser to ensure WesternREM's pop-ups are allowed.

1.3. Technical Support

Email – wrem@uwo.ca
Phone – 519-661-3036

2. GETTING STARTED

2.1. Access the System

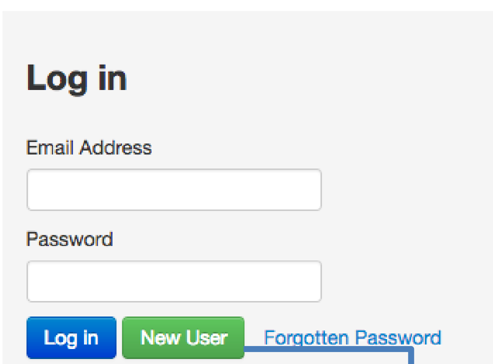
- Western-only studies - https://applywesternrem.uwo.ca
- Lawson studies - https://www.westernlawsonresearch.ca

2.2. Accounts

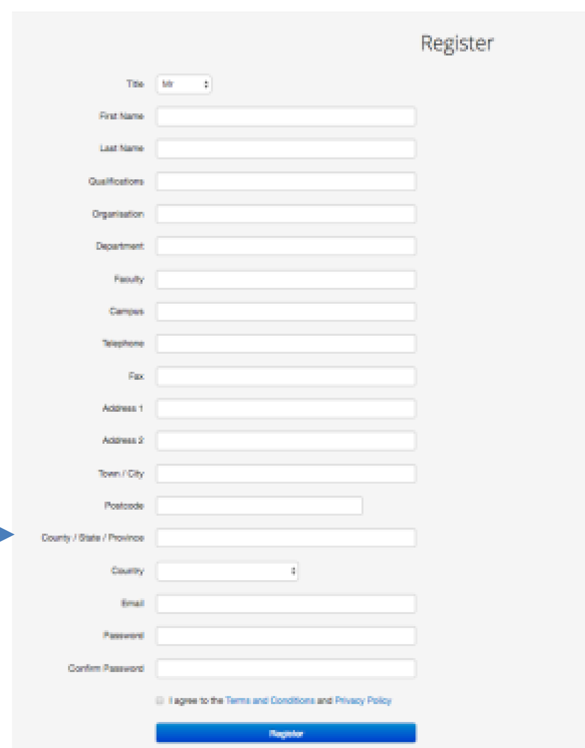
A WesternREM account will be automatically generated for all researchers and research support staff with a pre-existing ROMEO account. If you have forgotten your password at the login page, select '**Forgotten Password**' and you will receive an email with instructions about how to change it.

2.3. How to Register a New Account

If this is your first time using WesternREM, you will need to create a new account. To do this, click the '**New User**' button.



This will bring you to the **Registration** page

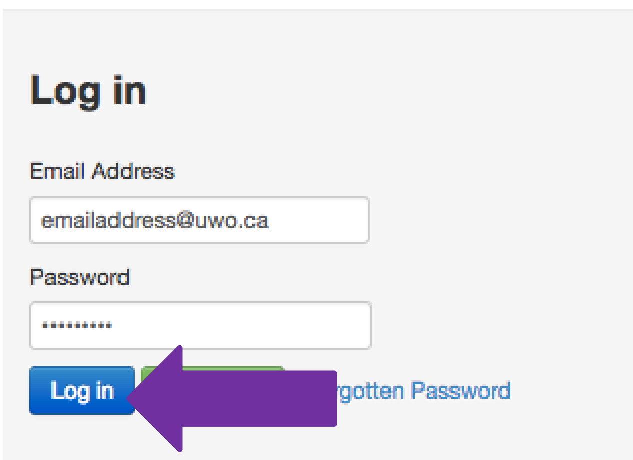


Complete the information required, review and agree to the Terms and Conditions and Privacy Policy, and click '**Register**' to submit your application. You will receive a confirmation in WREM and by email to the email account you have specified to verify your account verifying the registration form has been received.

> ***NOTE:** Only University, hospital and affiliated institution-approved emails can be used for this system. Once your identity is verified by the Office of Human Research Ethics (this can take up to 24 hours) you will receive access to WesternREM.

2.4. How to Log In

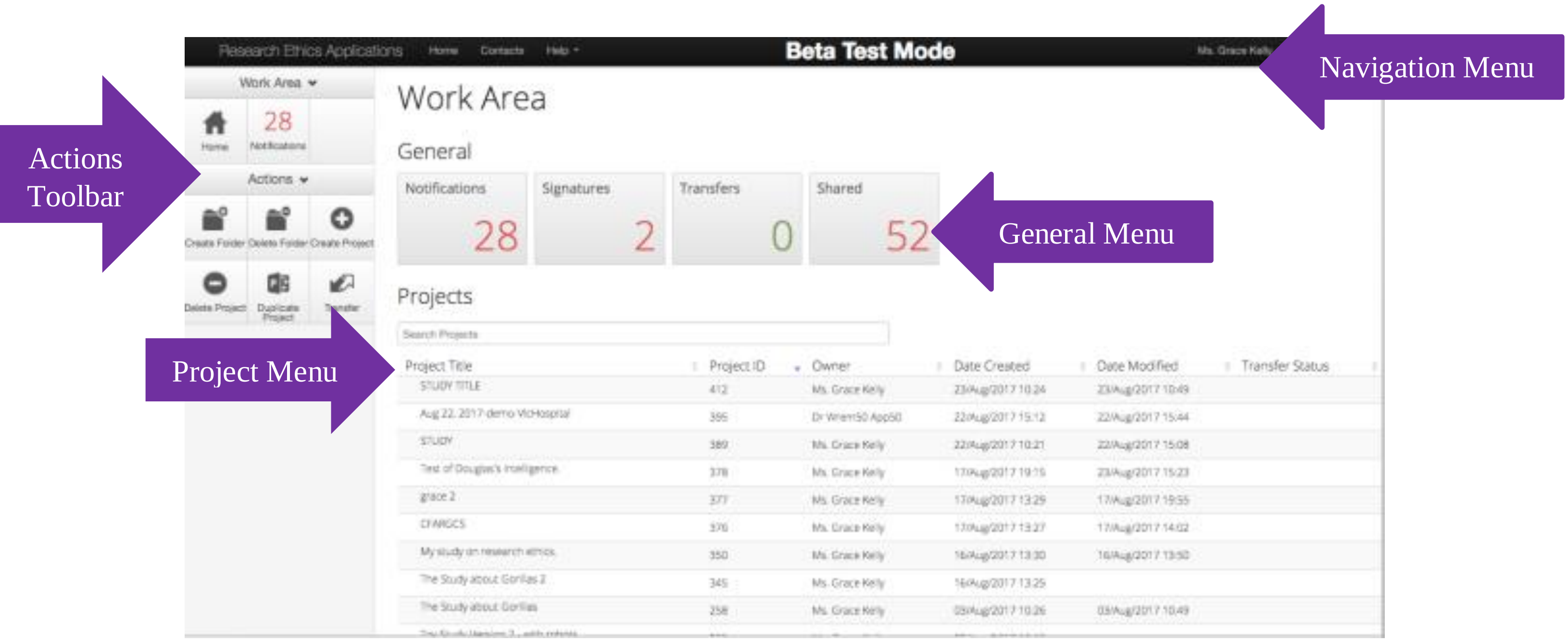
Once you have completed the registration process, enter your registered email address and password and click '**Log in**'.



3. NAVIGATING the WesternREM System

Upon logging into WesternREM, you will be directed to the **Work Area**. The Work Area is your home page where you will create new projects and find all current pending notifications.

3.1. Work Area



3.2. Navigation Menu

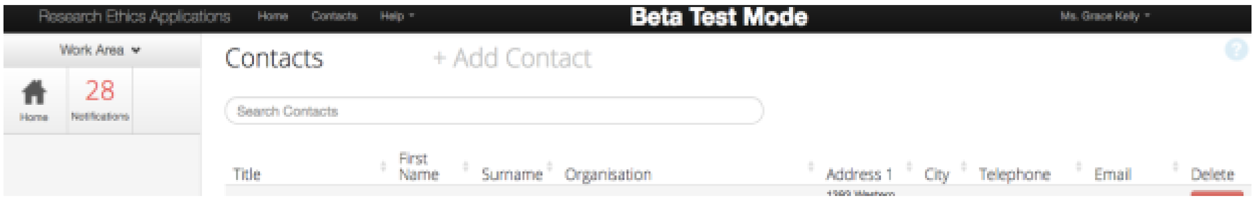
The **Navigation Menu** will always be visible at the top of the page no matter where you are in the system, and includes links to:

1. **Home** – takes you to the Work Area / home page
2. **Contacts** – takes you to the Contacts page. For more information, please refer to section 3.3
3. **Help –** The Help bar links to:
   a. **Contact Information –** Provides contact information for the Office of Human Research Ethics
   b. **Help –** Provides training materials for quick reference
   c. **FAQ –** Links to Frequently Asked Questions
   d. **Templates** – Links to REB Guidance Templates
   e. **About –** Provides information about Western University's Research Ethics Boards (REB)

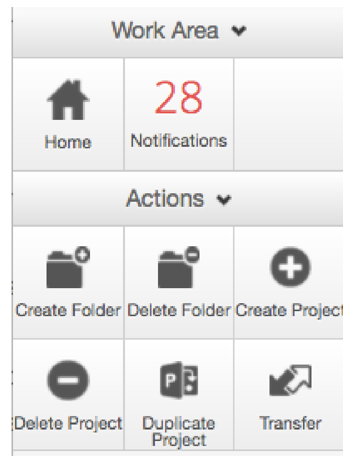
4. **Account Settings** – clicking on your name on the right-hand side of the Navigation Menu allows you to:
   a. **Change Password**
   b. **Update Personal Information**
   c. **Logout**

3.3. Contacts

This page lists all of the contacts you have saved to your personal address book in WesternREM.



3.4. Actions Toolbar



The **Actions Toolbar** will display all actions available in WesternREM. The Actions Toolbar is dynamic and will only display the actions currently available to the user depending on what stage you're at in the system.

3.4.1. Create Folder

Creating folders will help you easily organize your applications within WesternREM. Whether you are working with several PIs, many research students or just simply want to organize between Full Board and Delegated, you can use the **Create Folder** function to do this.

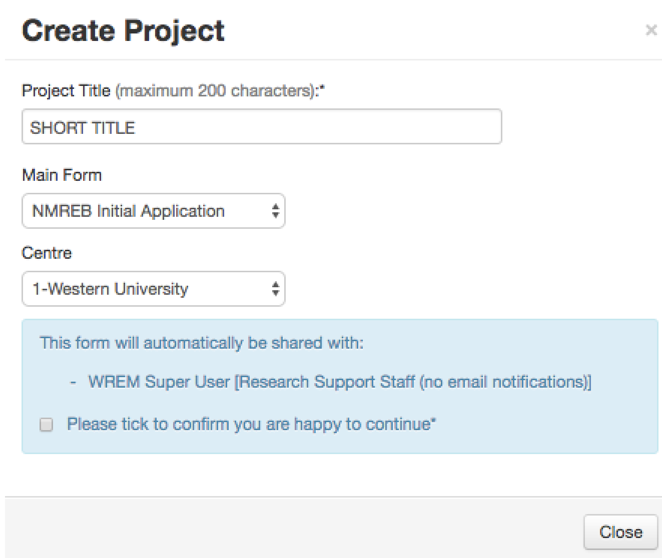
1. Click the '**Create Folder**' tile
2. Add a folder title (no more than 40 characters)
3. Drag and drop the files from your list of Projects into the folder
4. To move files out of the folder, click on the folder
5. Click the '**Move project**' tile and select the Project and Destination you wish for that file to move
6. Click '**Move**'

3.4.2. Delete Folder

1. Once the folder is empty (see section 3.4.1 on how to "Move" a project), you can delete the folder
2. From the Home page, click on the '**Delete Folder**' tile
3. Select the folder you wish to delete
4. Click '**Delete**' and confirm with '**Yes**'

3.4.3. Create Project

Clicking the '**Create Project**' tile will bring up the Create Project dialog box.



a.) Project Title.
- Enter your short title (fewer than 200 characters). This title will be used to access your file from the **Project Menu**, so ensure it is something unique.

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, please contact our office for assistance.

c.) Centre
- Select the appropriate Centre with whom you are affiliated:
  - Western University
  - Lawson Research Institute (and affiliated centres)
  - CPRI
  - TVCC
  - Vanier

d.) Providing Access to the OHRE
- A blue box will appear asking you to confirm you agree that the form can be shared with the Office of Human Research Ethics.

***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.

> For more information about how to Create a Project, review the**:**
> **WREM Applicant – QuickGuide: Creating a New Project**

3.4.4. Delete Project

Clicking the '**Delete Project'** tile in the Action Toolbar will bring up the Delete Project pop-up window.

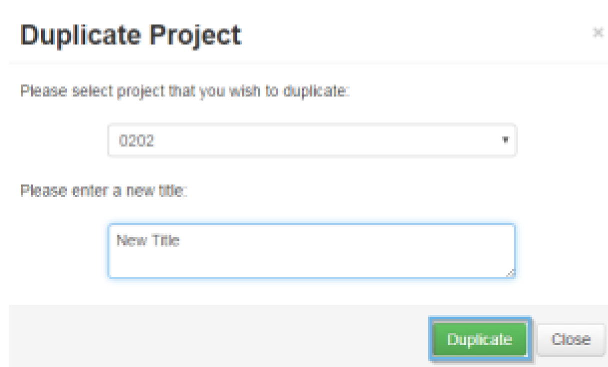
1. Select from the drop-down list the project you want to delete and click the '**Delete**' button.

***NOTE:** Projects that have been submitted for review cannot be deleted.

3.4.5. Duplicate Project

Clicking the '**Duplicate Project'** tile will bring up the Duplicate Project dialog box.

1. Select the project from the drop-down list you want to duplicate and click the '**Duplicate**' button.
2. The duplicated project will appear in your Projects Menu.



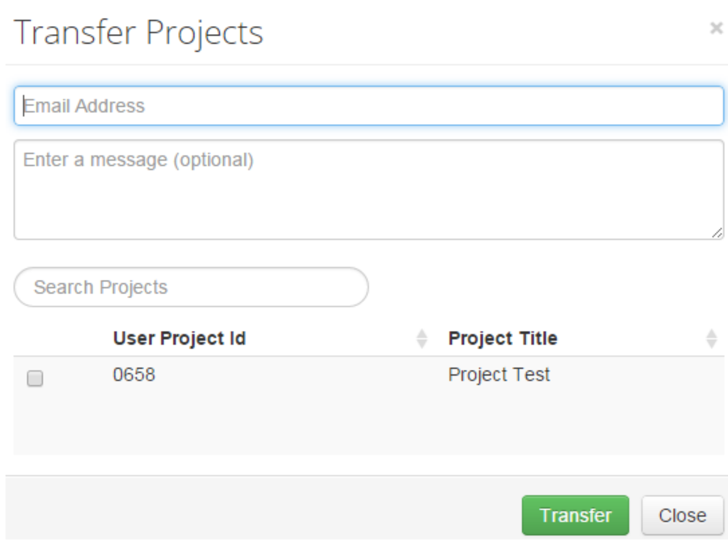
***NOTE:** Duplicating a project will create an exact replica of the project, including all of the applications associated with the project – but excludes any documents uploaded in the original project (e.g., protocols, consent forms, etc.).

3.4.6. Transfer Project

WesternREM facilitates transferring the ownership of a project from one person to another. Only the current **Project Owner / Form Owner** (the user who created the project) has the ability to initiate a transfer.

Once the project is transferred to another individual, it will no longer be listed on your project list and you will no longer have access to it unless the new owner shares the project with you.

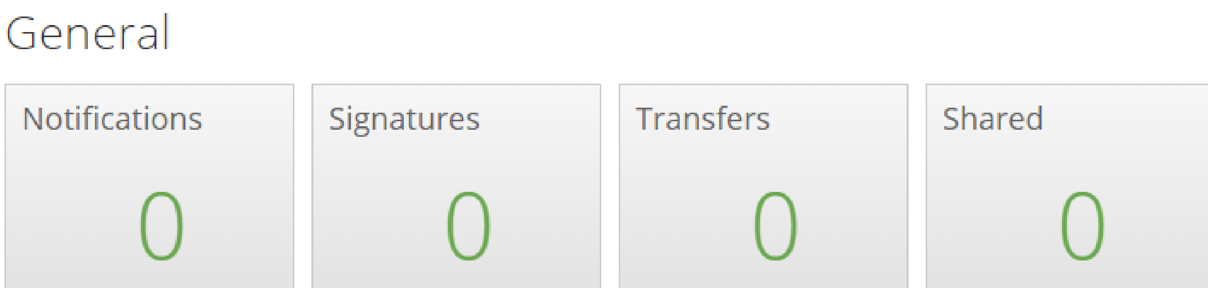
1. Click the '**Transfer**' tile – this will bring up the Transfer Projects dialog box.
2. Select the project you want to transfer from the list by clicking on the checkbox next to the User Project ID, or search for the project you want to transfer. Input the email address of the person to whom you are transferring the project.
   a. You can also enter a message to accompany the transfer.



3. Once the transfer request is complete, the transfer recipient will receive a notification through WesternREM and his/her personal email. The transfer recipient can then accept or reject the transfer.

3.5. General Menu

The **General Menu** is the main hub for all notifications and is based on four distinct categories. The number listed in the corresponding tile is the number of unread notifications.

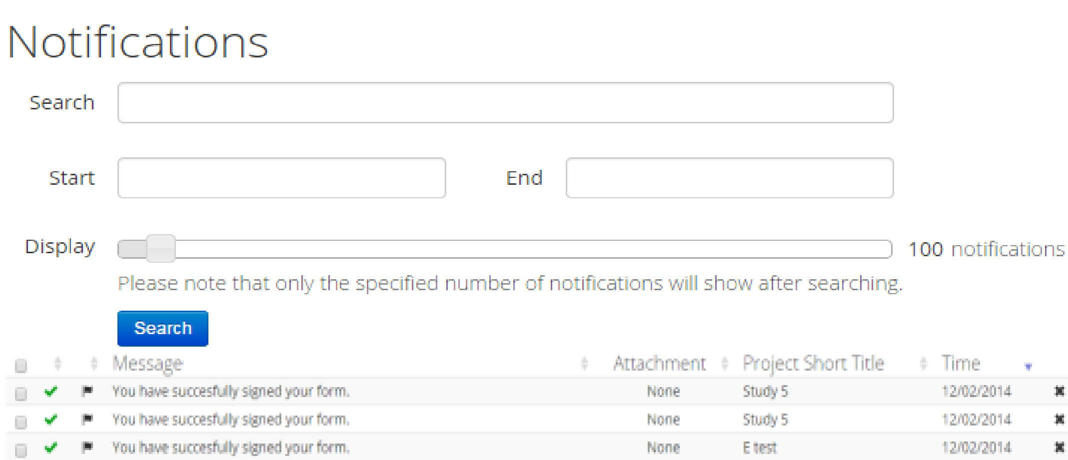


The General Menu tiles will only appear on the Work Area / Home page.

3.5.1. Notifications

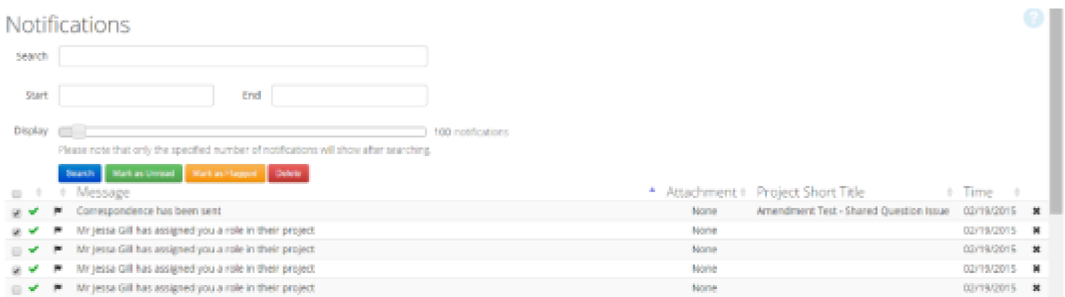
Users will receive notifications whenever an event occurs on an application form within a Project. Clicking the **Notification** tile will bring you to the Notifications page, which is like an email inbox.

1. You can search through the available notifications by keywords
2. You can search through the available notifications by start and end date
3. The display slider can be used to change the number of notifications returned as results once a search is completed



4. The check box to the left of each message can be used to select one or more messages at one time. You can select all messages at once by clicking the check box at the top left-hand side of the page.
5. Selected messages can be marked as unread, marked as flagged, or deleted.
   - Delete a single notification using the X on the right side
   - Delete multiple notifications by clicking the boxes on the right and selecting an action

     ***NOTE:** Deleted notifications cannot be recovered.



3.5.2. Signatures

Clicking the **Signatures** tile will bring you to the Signatures page. Here, users can view Signatures that have been collected on the form, or Signature Requests, along with the status of the Signature or Signature Request (Valid, Invalid or Requested).

Signatures

Type	Signatory Email	Signed Date	Validity
Principal Investigator	scott.tomlinson@ctontario.ca	31-Jan-2017 13:14	Valid

Signature Requests

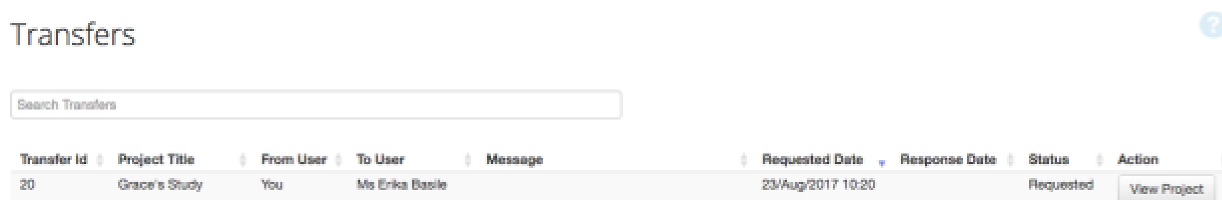
Type	Signatory Email	Requested Date	Status	Response Date	Action
Department Head	erin.bell@ctontario.ca	31-Jan-2017 13:12	Invalidated		Cancel
Department Head	erin.bell@ctontario.ca	13-Jan-2017 15:21	Invalidated		Cancel
Principal Investigator	matthew.dascanio@ctontario.ca	13-Jan-2017 15:21	Invalidated		Cancel

You can search through your pending and previous signature requests using the following criteria: Project Title, Requesting User Name and Requested Date.

For more information about how to Sign an Application, review the**:**
WREM Applicant – QuickGuide: Signing an Application

3.5.3. Transfers

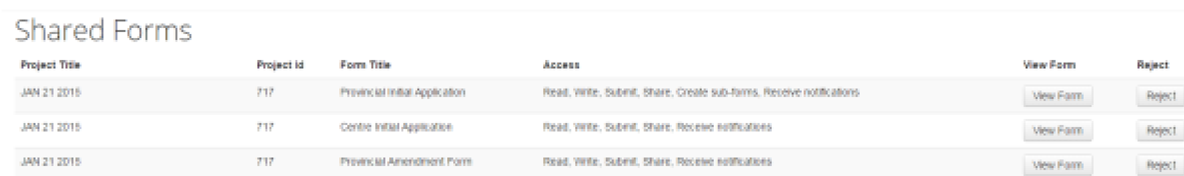
Clicking the **Transfers** tile will bring you to the Transfers page. You can search through the pending/completed transfer requests using the following criteria: Transfer ID, Project Title, User Name and Date.



3.5.4. Shared

Clicking the **Shared** tile will bring you to the Shared Forms page. You will be presented with a list of forms that have been shared with you, along with related information.

> ***NOTE:** These projects will only be ones that have been shared with you as an external team member (i.e., you are not the Project Owner / Form Owner or have a Role in the project.



To view the form that has been shared with you, click the '**View Form**' button. The share can be rejected should you no longer wish to be a collaborator on an application form. Shared projects will also be available under the Project Menu in the Work Area.

3.6. Project Menu

The **Project Menu** contains a list of all of the Projects to which you currently have access. You can easily search this project menu by using the '**Search Projects**' search bar.