

QuickGuide: Creating Centre Initial Applications (Applicant)

Centre Initial Applications (CIA) are typically created by a member of the Provincial study team, who also uses the Collaboration features to give corresponding access and permissions to member(s) of the site teams. Details on collaboration features can be found in the Collaboration – Roles and Sharing manual.

1. Log in to CTO Stream, and click on the study that you wish to create a CIA for from the Work Area
2. Make sure that the Provincial Initial Application is highlighted in grey in the Project tree (if not, click on the Provincial Initial Application in the project tree)
3. In the left hand Actions toolbar, click on “Create Sub-form”.
4. In the pop-up window, select “Centre Initial Application” and select the centre you are creating the sub-form for from the drop-down menu. Tick the checkbox and press “Create”.
5. This will automatically take the user into the CIA (it will be highlighted in grey in the project tree). Click on the “Roles” button on the left hand Actions toolbar.
6. Enter the email address and role of an individual from the participating site and select the corresponding role, and click “Share Role”.

Tips:

- Each participating site can update their ‘centre’ after the CIA has been created by clicking on the “Centre” tab from the CIA table of contents page
- The provincial study team must give at least one individual from that site a role on the CIA (otherwise no one from that site will have access to the form); that user can then add other site personnel as collaborators
- You can see who has access to any form by clicking on the ‘Collaborators’ tab from the form’s table of contents page
- If you try to share or give a role to an individual who does not have an account in CTO Stream you will receive an error message (“User does not exist in system”). Please contact CTO – we can set this person up with an account.

Questions?

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