



User Manual

Applicant

Sharing a Form

Sharing a Form

The screenshot shows the Concierge interface. On the left is a sidebar with navigation and action tiles: Home, Notifications, Actions, Project, Create Sub-form, Share, Refresh, Print, and Correspond. The main area displays a Project Tree with a tree structure: Proj-002, Protocol Submission Form - 778 - Proj-002, and PI & Site Submission Form - David - Fillmore. A blue circle with the number 1 is next to the text "Select the form". Below the tree is a table with columns "Not Submitted", "N/A", and "Date Modified" (20-Nov-2019 12:01). Below the table are tabs for "Navigation", "Documents", "Signatures", "Collaborators", "Submissions", and "Correspondence". The "Collaborators" tab is active, showing a table with columns "Name", "Access", and "Edit Permissions". The table contains one entry: "Mr. David Fillmore" with "Project Owner and Form Owner" access and an "Edit Permissions" button. A blue arrow points from the "Share" tile in the sidebar to the "Click the Share tile" text.

Select the form 1

Click the Share tile 2

Not Submitted	N/A	Date Modified
		20-Nov-2019 12:01

Navigation Documents Signatures Collaborators Submissions Correspondence

Collaborators

Name	Access	Edit Permissions
Mr. David Fillmore	Project Owner and Form Owner	Edit Permissions

The screenshot shows a "Share" dialog box. It contains the text: "Sharing a form enables others to view/edit the same form depending on the level of access you give them. Please select the users you wish to share this form with:". Below this is a text input field labeled "Collaborator email" and a list of permissions: Read, Write, Submit, Share, Create all sub forms, and Receive notifications. A blue circle with the number 3 is next to the text "Enter e-mail & set permissions". At the bottom, there is a "Share" button and a "Close" button. A blue circle with the number 4 is next to the text "Click Share". A blue arrow points from the "Share" button to the "Click Share" text. A blue arrow also points from the "Share" dialog box back to the "Share" tile in the sidebar from the previous screenshot.

Share ?

Sharing a form enables others to view/edit the same form depending on the level of access you give them. Please select the users you wish to share this form with:

Collaborator email

3 Enter e-mail & set permissions

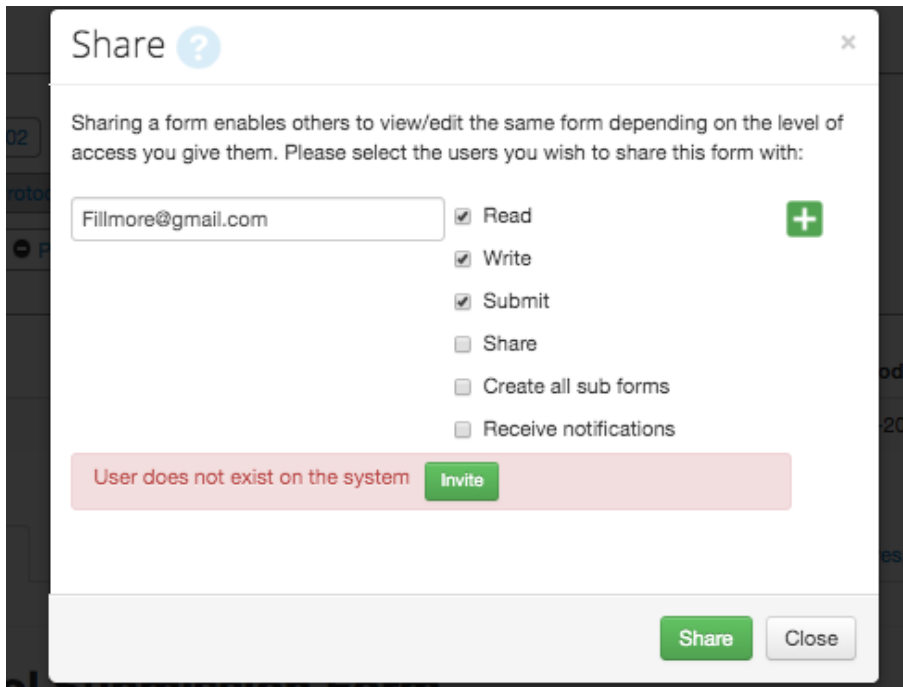
- Read
- Write
- Submit
- Share
- Create all sub forms
- Receive notifications

4 Click Share

Click  if you wish to share with additional people

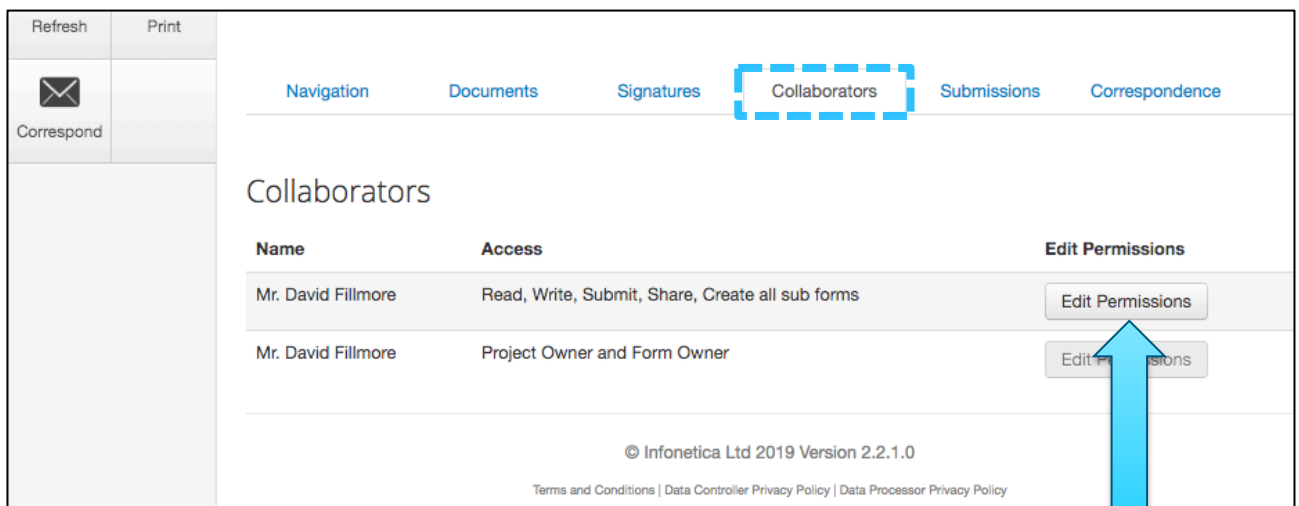


Sharing a Form



The recipient must be a registered user. If not, you must invite them to join in order to share with them.

If they are, they will receive the form and be added as a collaborator



You can change their permissions at any time by clicking Edit Permissions



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