CTR Portal
Updating Project Record

An individual actively assigned to a project has the ability to make certain modifications to the project record, including:

- Adding or inactivating personnel
- Adding documents
- Adding notes

The following information illustrates how to complete each type of modification.

Add/Inactivate Personnel:
To add or inactivate personnel on a project navigate to the Personnel tab within a project record.

Adding a new person to a project

1. On the Personnel tab, select the “Add Personnel” button; the Add Personnel window will open.

2. Role: Select a role from the drop down list.
3. Personnel: search by last name of the person to be added, select the person and save.
   a. After saving, review the Personnel tab to verify the person has been added.
Add multiple roles to an existing person:

1. Navigate to the individual’s name on the Personnel tab.
2. Select the Add Role button, opening the “Add Role” window.
3. Select the role to be added and save.
4. Review the Personnel tab to verify that the role has been added to the individual’s record.

Inactivating personnel on a project

1. On the Personnel tab, navigate to the name of the person to be inactivated.
2. Select the Edit button associated with the role to be inactivated.
3. Change the Active drop down from ‘Yes’ to ‘No’ and Save.
4. If the individual is no longer associated with the project, repeat the process to change all roles to No.
Add documents:

1. In the Project Record (found by searching for a project in My Projects) there are three tabs available (shown by image to the right),
2. Select the Documents tab.
3. Scroll to the bottom of the page to the section called Study Documents.
4. Select the Upload button (which will open the Upload Documents window).

5. To select the file to add, click +Add files... and browse for the file you want to upload.
6. Select the file and click Open.
7. Once the file has been selected, you are required to select a document type; choose a document type from the drop down list.
   a. The individual who created the document and the date the document was created information is optional, but recommended.
8. The file can now be uploaded or another file can be selected.

9. There are two ways to begin the document upload process, 1) click on the Start upload button at the top of the Upload Documents window or 2) select the start button for individual files.
   NOTE: If a document type is not selected, there will be a system error. Repeat the upload process from step 5, selecting a file, to correct the error.
10. Once all documents have been uploaded, the Upload Documents window can be closed and your document will be available in the Study Documents section of the project.
Add notes to a project record:

1. In the Project Record there are three tabs available (Basic Information, Personnel, and Documents). The notes are at the bottom of the Basic Information tab.

2. To add a note, click the “Add” button, which opens the “Add notes” window.

3. Type your notes in the notes box. Then click Save.

4. Once Saved, your note will show under Project Notes in the order it was created.

5. The creator of a note also has the ability to edit the note. Click the Edit button next to the note to be edited, make any corrections in the Edit window, and Save.

   NOTE: Once a note is entered it cannot be deleted, only edited by its’ creator.