

CTO STREAM



Transferring Project Ownership

CTO Helpdesk:
support.ctontario.ca

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Project Ownership

- When a new project is created in CTO Stream, the user who performs the ‘Create Project’ action automatically becomes the Project Owner. The Project owner’s name is displayed in the “Owner” column of the Projects list found in the Work Area (*Figure 1.1*).
- If the Project Owner leaves the project for any reason, they need to transfer ownership of the study to the individual responsible for taking over their duties.

Note: The Project Owner is the only user capable of initiating a project transfer request for a study in CTO Stream.

General

Notifications 17	Signatures 0	Transfers 1	Shared 34
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Projects

Search Projects

Project Title	Project ID	Owner	Date Created	Date Modified	Transfer Status
TEST2110	1875	Dr. Provincial Applicant	04/Nov/2019 15:47	14/Nov/2019 15:28	Transfer Requested
RCT X vs Y	1874	Dr. Provincial Applicant	04/Nov/2019 13:56	18/Nov/2019 14:32	Transfer Requested
RCT X vs Y - 2170	1866	Mr. Scott Tomlinson	10/Sep/2019 11:42	30/Oct/2019 15:23	
RCT A vs B	1856	Dr. Centre Principal Investigator	21/Aug/2019 15:28	13/Nov/2019 14:06	

Figure 1.1

- Once a project transfer request has been initiated, the “Transfer Status” will update to “Transfer Requested” in the Projects list. Once the recipient has accepted the transfer, the status will update to “Transfer Accepted”.

Projects

Search Projects

Project Title	Project ID	Owner	Date Created	Date Modified	Transfer Status
TEST2110	1875	Mr. Scott Tomlinson	04/Nov/2019 15:47	14/Nov/2019 15:28	Transfer Accepted
RCT X vs Y	1874	Dr. Provincial Applicant	04/Nov/2019 13:56	18/Nov/2019 14:32	Transfer Requested
RCT X vs Y - 2170	1866	Mr. Scott Tomlinson	10/Sep/2019 11:42	30/Oct/2019 15:23	
RCT A vs B	1856	Dr. Centre Principal Investigator	21/Aug/2019 15:28	13/Nov/2019 14:06	

Figure 1.2

Transferring Ownership:

1. To transfer ownership of a study, click the 'Transfer' button (Figure 1.3) from the Actions Menu on the left-hand side of the Work Area page.

Note: Only the Project Owner of the study can initiate a Project Transfer.

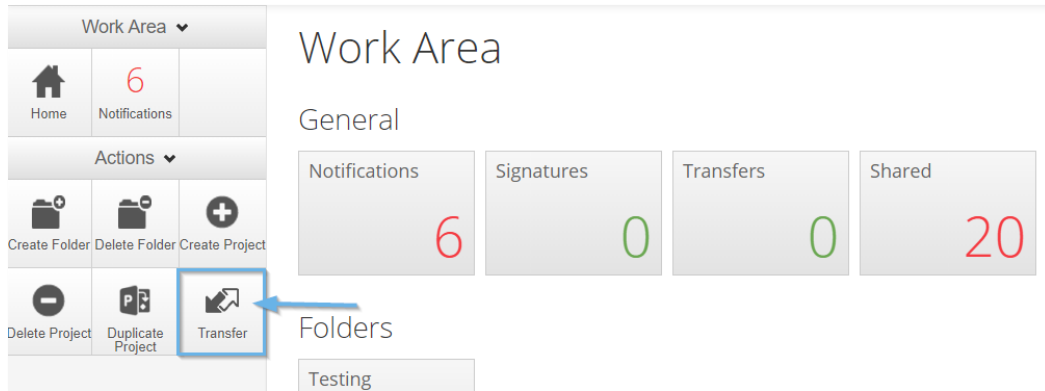


Figure 1.3

2. Once 'Transfer' is pressed, the 'Transfer Projects' pop-up window will appear on-screen.
3. Select the project(s) you wish to transfer by clicking the checkbox to the left of the User Project ID (Figure 1.4).
4. Enter the email address of the CTO Stream user you want to transfer the study to. You can also include an optional message to the recipient and then press the green 'Transfer' button to continue.

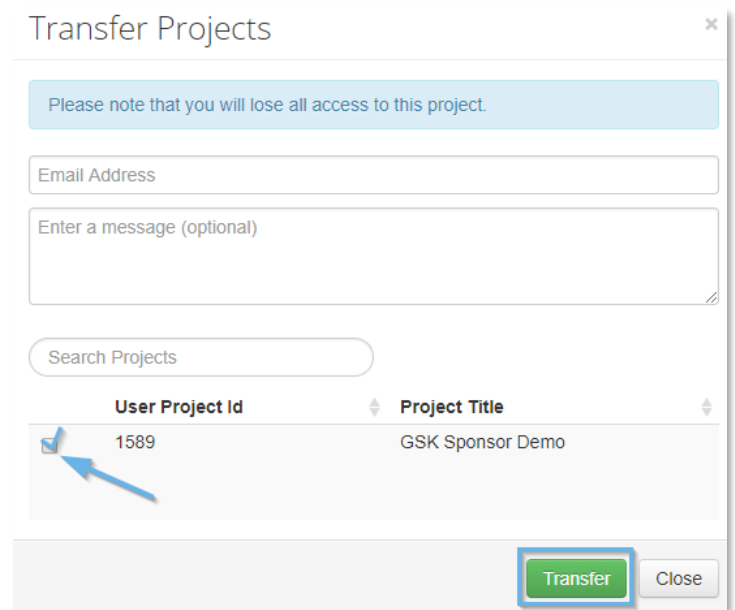


Figure 1.4

Accepting a Project Transfer

(Completed by the user receiving the transfer)

- Once the Project Transfer has been initiated by the Project Owner, the recipient of the request receives an email to notify them and the number on the front on their “Transfers” tile is increased by one (Figure 1.5). To accept the transfer, open the Transfers tile.

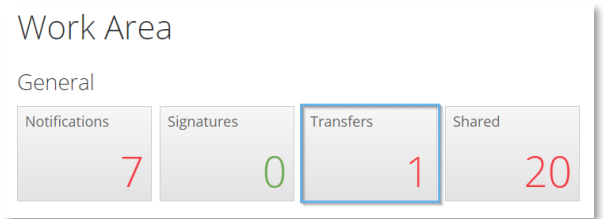


Figure 1.5

- Inside the Transfers tile, any new transfer requests will be highlighted in yellow and the ‘Status’ of the request will show as “Requested”, as in figure 1.6 below. Press the ‘View Project’ button in the far-right column to open the study and accept the transfer.

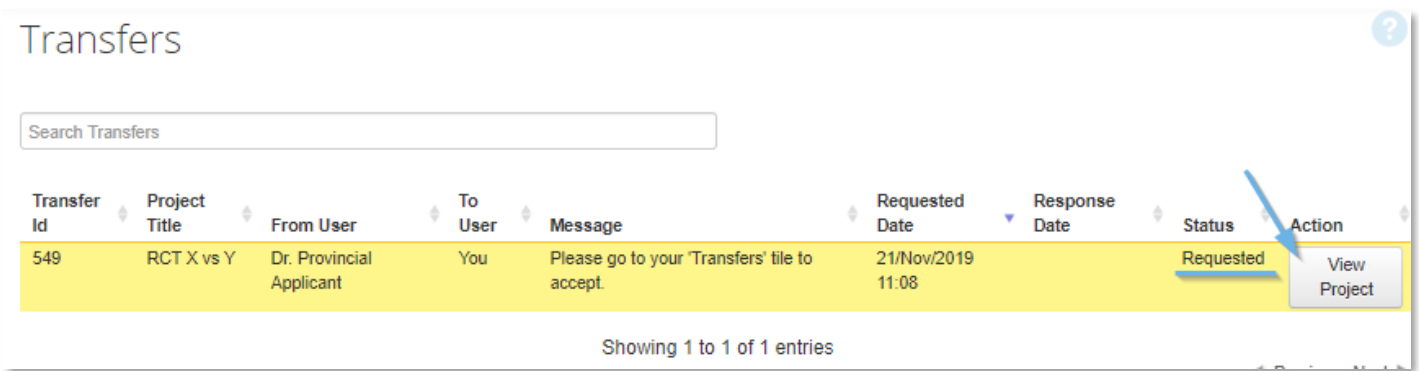


Figure 1.6

- A description of the columns within the Transfers tile can be found in table 1.0 below:

Table 1.0	Description
Transfer Id:	A unique system identifier for the project transfer request.
Project Title:	The study acronym/nickname of the study in CTO Stream.
From User:	The current Project Owner who sent the transfer request
To User:	The user being requested to accept the project transfer to become the new Project Owner.
Message:	An optional message from the ‘From User’ included with the request.
Requested Date:	The date the project transfer request was initiated.
Status:	The status of the project transfer request. Pending transfers that you have yet to accept will show as “Requested”.
Action:	Displays the ‘View Project’ button which takes you to the Project being transferred (button will appear greyed-out when unavailable).



3. Once inside the project, press the 'Accept Transfer' button from the Actions Menu on the left side of the screen (Figure 1.7).

Note: Once the Project Transfer has been accepted, the previous project owner will no longer have access to the study in CTO Stream.

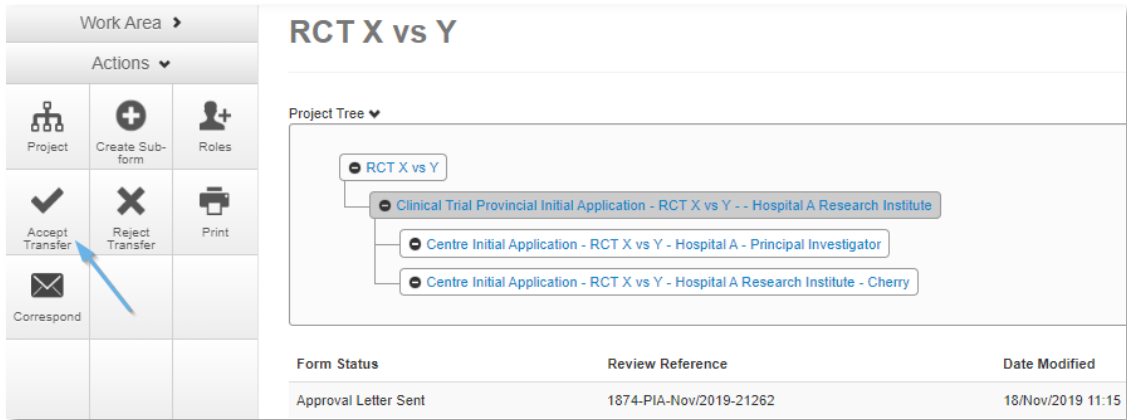


Figure 1.7