QuickGuide: Project Overview

When looking at the project tree for a study in CTO Stream, the application form you currently have selected in the tree will appear highlighted in grey. Located below the project tree are 8 different tabs which display different types of information about the application. One example is the Documents tab (Figure 1) which contains a list of all documents that have been uploaded to the form. The Documents tab is an example of application-specific information.

Instead of viewing information about a specific form it is also possible to view 'project-wide' information on separate page, called the **Project Overview page**. To access this page, press the 'Project' button on the left-side of the page while you are looking at the project tree, or click on the study title at the top of the project tree (Figure 1).

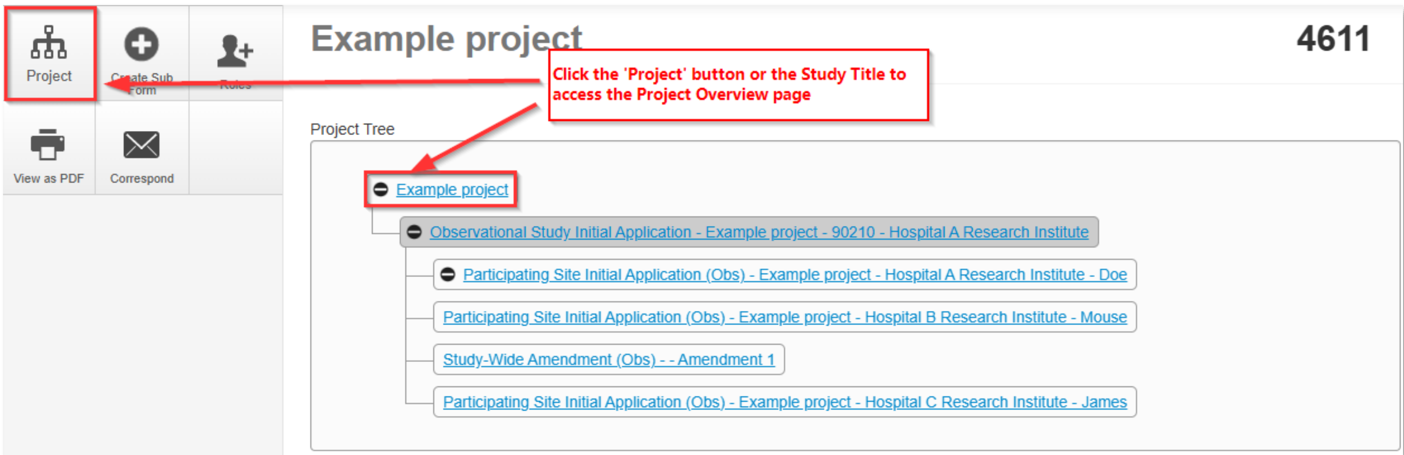

Figure 1

On the Project Overview page you will see 6 tabs located below the project tree. As mentioned previously, these tabs do not contain information specific to just one application form. Instead, they contain summary information about ALL forms that exist for the project. The Forms tab (shown below in Figure 2*)*, along with the 5 other tabs called: Submitted Documents, Transfers, Centres, History, and Project Documents are described in the table below.

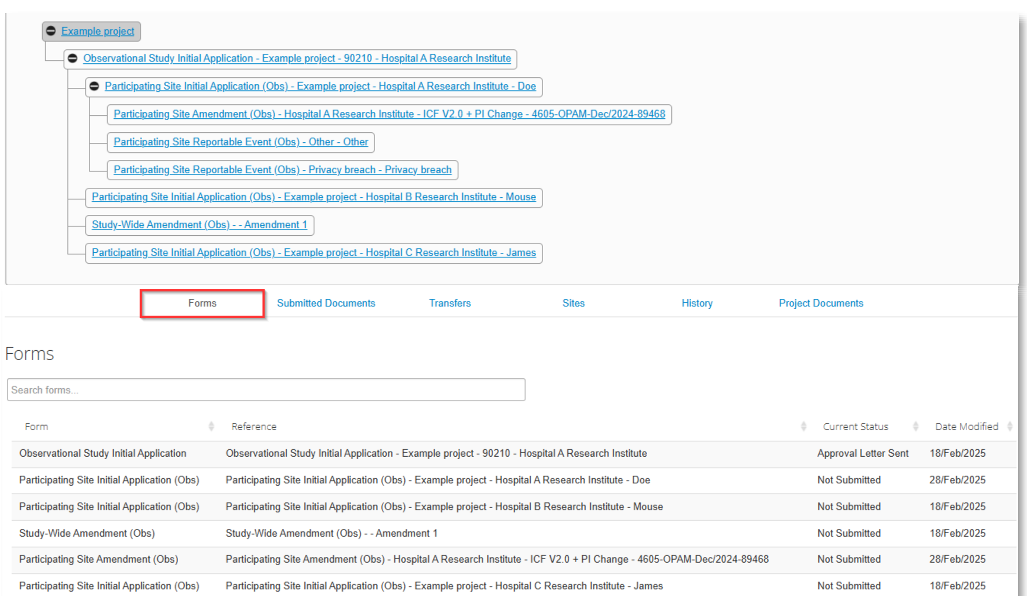

Figure 2

TAB NAME	DESCRIPTION AND FEATURES	AVAILABLE INFORMATION
FORMS	Displays all application forms associated with the study. Clicking on the row will take you to the application workspace. Search bar enables users to search for a specific form.	**Form** – displays the name of the form **Reference** – displays Form Reference information including the name, type of form and centre name (if applicable) **Current Status** – displays the current status of the form in the REB review process **Date Modified** – displays the date of the last change made to the form
SUBMITTED DOCUMENTS	Displays a list of any documents submitted to the REB (includes archived versions)	**Form Reference** – displays the name of the form which the document was uploaded to (as it appears in the project tree) **Form Name** – displays the type of application the document was uploaded to (i.e., Study-wide Amendment) **Submission Date** – displays the date of submission of the listed form **Status** – displays the status of the application form that the document was uploaded to **Type** – displays the category the document belongs too **Name** – displays the name of the document **Version** –displays the version number of the document **Size** – displays the disk space size of the document **View** – button allowing user to download document to computer **Archived** – displays whether the document has been archived by the REB (replaced by subsequent document or submission).
TRANSFERS	Displays transfers of project ownership which have been initiated on the project, along with related information.	**Transfer ID** – displays unique ID assigned for tracking purposes to each transfer request in CTO Stream **From User** – displays the user who initiated the transfer **To User** – displays the user who will receive the transfer request **Requested Date** – displays the date the transfer was initiated **Status** – displays the status of the transfer (Requested, Accepted or Rejected) **Response Date** – displays the date the "To User" responded to the transfer request **Action** – allows a pending transfer request to be canceled by the "From User"
SITES	Displays a list of all participating sites involved in the study and the status of ethics approval, the expiry date and name of site Principal Investigator.	**Site Name** – displays the name of the participating site **Status** – displays the status of ethics approval at the participating site (e.g., Approved, Suspended, Expired) **Expiry Date** – displays the ethics expiry date for the site, once the PSIA for the site has been approved **Contact** – displays the name of the Principal Investigator listed in the PSIA for the participating site

Tab Name	Description and features	Available Information
History	Displays a complete listing of everything that has occurred in the project since the project was created (in chronological order). Examples include form submissions, project transfers or status changes during the REB review process.	**Date** – displays the date the event occurred **Form Reference** – displays the name of the form in which this event occurred **User** – displays the name of the user who performed the action **Description** – displays information about the event and what actions occurred **Attachment** – displays a direct link to download any forms or letters associated with the event. Clicking Download will download the pdf file to your computer.
Project Documents	Displays a list of the currently approved/acknowledged documents for the project. (i) new documents will appear as they become approved/acknowledged; (ii) documents are removed from this table when a newer version of the document is approved/acknowledged and the previous version is superseded.	**Document Name** – displays the name of the document **Document Date** – displays the version date of the document **Document Version** – displays the version number of the submitted document **Document Category** – displays if document will be approved, acknowledged, or received **Download Document** – by clicking 'Download' button a document will be open in the pdf format and downloaded to your computer **Document Type** – displays the document type within CTO Stream **Site Name** – displays name of the Site/Institution the application was created for.

Questions? Submit a support ticket at support.ctontario.ca