Managing user share access and permissions

What are access permissions?

There are varying levels of access to applications and forms for users in Research GEMS:

- **View**: User can only view applications and forms.
- **Edit**: User can view and edit applications and forms.
- **Submit**: User can view, edit and submit application and forms.

It is the responsibility of the coordinating principal investigator (CPI) and principal investigator (PI) to determine and establish who should have access to their research study and be given the appropriate permission to prepare and submit application/s and form/s in GEMS.

For information on how researchers can share access to their application/s and project/s, click here.

What are roles?

There are several role types in GEMS to describe a person's involvement in the study. Roles are assigned to users against an application or project and are usually determined as part of the application process. Post approval, roles can be changed via the ethics and site amendment forms.

For further information on what is an application vs project, see user guide 'Applications and projects defined.'

Managing access rights and role types

While there are amendment forms that researchers can use to notify research offices of changes to their studies, these changes can also be manually made within the system.

After an application has been submitted, an ethics officer (EO) or research governance officer (RGO) can manually add and/or remove users, assign access and roles for an application or project.

Note: Ensure you have the appropriate approval before changing users, their access or roles. Approval documents can be uploaded under 'Related documents.'

The following two locations need to be updated against the application or project:

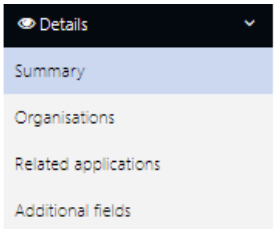
- Summary page (under Details): to add/remove users and their access permission.
- Contacts page (under Management): to add/remove users and their role.

Note: Adding users manually in the internal portal will NOT send a system generated email to notify the person/s that an application or project has been shared with them. You will need to do this outside of GEMS.

Step 1. Open the ethics/site application or project.

Locate and open the ethics/site application or project.

Navigate to the Details section and select 'Summary.'



Update user access/permissions

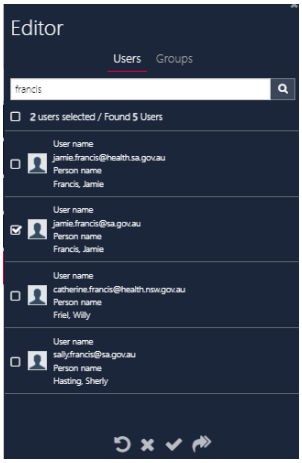
Step 2. Change user access

Click on the edit icon from the right-hand menu to edit various fields on the summary page.

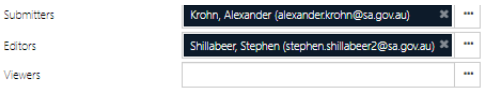
To add a person as a submitter, editor or viewer, click on the required access row's three dots to search for the user.

Note: You can only add users who have a GEMS account.

Tick the box next to the person's name, followed by the tick button below, to apply the selection.



To remove a person as a submitter, editor or viewer, click on the 'X' against their name in the relevant access row.



Note: There must only be one owner, and that owner should be the CPI or PI.

Step 3. Save user access/permission changes

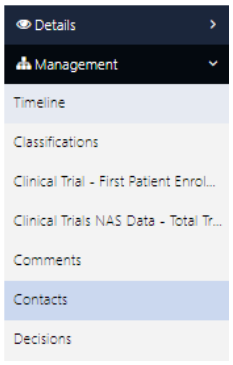
To save the changes made, click on the save icon from the right-hand menu.

Update contacts to assign user roles

Note: Assigning a role to a person in contacts will add the user as a team member in the external portal.

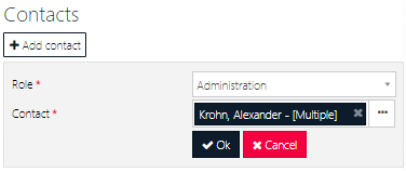
Step 4. Add the person's role

Navigate to the Management section and select 'Contacts.'

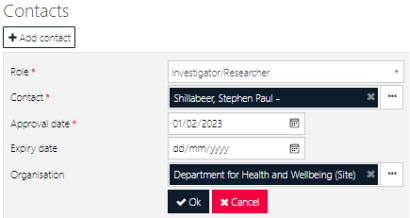


Click on the '+ Add contact' button and select the person's role from the dropdown list.

For applications: add the person by clicking on the contact row's three dots to search for the person. Click on the person, followed by the 'Ok' button to apply the change.



For projects: add the person by clicking on the contact row's three dots to search and select the person. Enter the approval date for when the person became a team member. Select the person's organisation from the drop-down list or leave blank. Click the 'Ok' button to apply the change.



Step 5. Save the change to person's role

To save the changes made, click on the save icon from the right-hand menu.

Important: *Remember to exit out of the application or project by clicking on the cross icon from the right-hand menu. Otherwise, the application or project will remain locked by the last user.*

Sharing access rules

Ethics/site application and amendment forms have limitations on the number of people who can be given or have submit access.

- For Non-Clinical Trials: Two administration contacts can be added with submit permission, per ethics and site application.

- For Clinical Trials: Two administration contacts can be added with submit permission, per ethics and site application and one Associate Investigator (AI) can be added with submit permission, per SSA application.

For more information on sharing access rules, click here.

In the internal portal, there are no system limitations on the number of submitters that can be added.

However, EOs and RGOs should note these sharing access rules in the external portal as it will have an impact on the ethics/site amendment form that notifies research offices of a change in CPI/PI and Administration Contacts.

In the external portal, researchers will need to remove the additional administration contacts or site investigators with submit access, before being able to add new team members with submit access, in maintaining the limit of delegates with submit access allowed.

Note: An error message will appear if maximum number of delegates has been exceeded.

Upon submission of the ethics/site amendment form by the researcher, the changes made to team members and their access will take effect immediately. No action will be required of the EO or RGO.

Important: *Team members and their access nominated in ethics/site application forms and post-approval amendment forms take precedent over users and their access added manually in the internal portal.*