Starting in GEMS

Research GEMS is the platform to manage ethics and site governance in SA.

GEMS has two portals – external and internal.

The internal portal is used by Research Office users working for SA public health organisations. This portal is used to manage the research governance process for all human research projects.

All other users will access GEMS through the external portal.

The first time you log into GEMS, your home page will be blank and in the 'Classic View' style. Setting up your home page will significantly help you manage your tasks and workflows in GEMS.

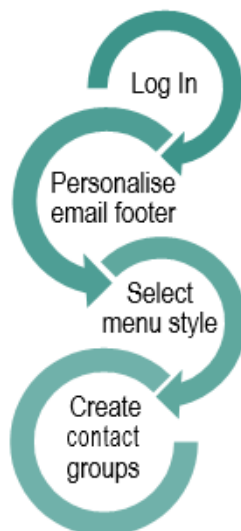Other tasks that may need to be completed include:

❖ Customising your GEMS email footer
❖ Select your menu style

What information is needed?

You should have the following information ready to get started in GEMS:

❖ Your user name and password
❖ Details to add to your GEMS email footer.

How does it work in GEMS?

Selecting the menu style

Note: When logging in for the first time your homepage will appear in the 'Classic View' style.

Step 1
Select   and then select   which   appears at the end of the menu.

Step 2
You can select to see your menu as 'Classic' or 'Vertical'. This is personal preference.
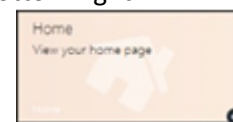
Classic View
When you select the   icon the menu appears.   Based off your permissions you will see all or some of the below icons.

You are able to move each tile in the panel by dragging to your desired location.

You are able to expand or reduce the size of the icon by hovering over the bottom right hand corner of the icon and clicking the arrow.

Vertical View
The menu is seen as a docked on the left hand side of the page. It uses the same icons as 'Classic View' and remains on the page even when navigating through the system. You cannot reorganise the order or size of this view.
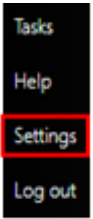
*Tip: If you hover over the icon the name will appear. If you click the icon then the other menu options appear.

GEMS email footer.
A number of the system generated emails within GEMS have been designed to display the email footer of the user

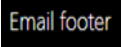creating the action. To create your own email footer:

Step 1

When in 'Classic View' click and select 'Settings.
When in 'Vertical View' select the settings wheel icon from the top right corner of your homepage.

Step 2
Select **Email footer**

Step 3
Add the text of your personalised email footer. This may be the same as your Outlook or other work email footer.
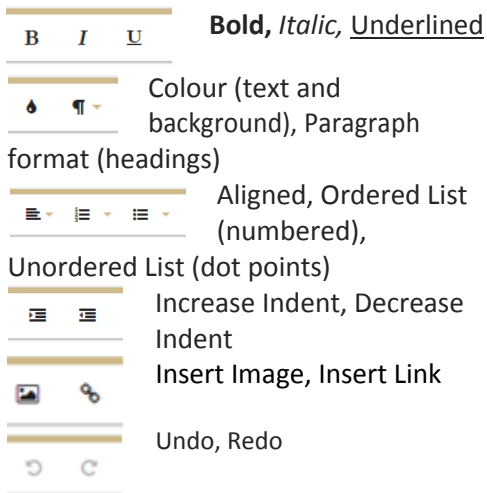
Step 4
You may choose to include your Institutions logo in your email footer.

The logo must first be saved as an image file on your computer.

Step 5
Use the formatting tools in the top bar of the email footer wizard to create the desired visual outcome.

Hover over the icon to reveal the tooltip, click to select.

Bold, *Italic,* Underlined

Colour (text and background), Paragraph format (headings)

Aligned, Ordered List (numbered), Unordered List (dot points)

Increase Indent, Decrease Indent

Insert Image, Insert Link

Undo, Redo

Step 6
Select 💾 Save

Setting up contact groups in GEMS

A contact group can be useful when the same group of people (HREC members) are invited to several meetings or asked to complete reviews.

Current functionality only allows the GEMS team to create contact groups in the system. If you want a contact group created, send the following details to the GEMS team:
❖ GEMS usernames of all contacts
❖ Contact group name i.e. ABCLHD HREC Committee
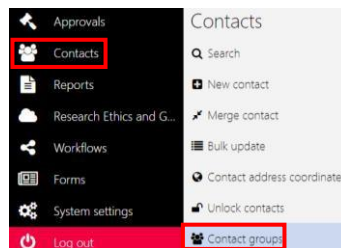
Edit a Contact Group (Add/Remove)

Step 1
In 'Classic View' click ∞ and select 'Contacts' and then 'Contact groups'
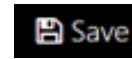
In 'Vertical View' click 'Contacts' and then select 'Contact groups'

Select ✏️ . To add people to the group, follow Step 6-7 'Setting up contact groups in GEMS'.

To remove people from the group, select the ✖️ next to the person you wish to remove.

Save updates to the group by selecting:

💾 Save

Homepage Setup

See *Quick Reference Guide – Research Officers – Setting up a home page*