

EthOS Video – Principal Investigator Signature

00:00 Narration

(Over background music) “Hi everyone, welcome to this short video on how a Principal Investigator signs an EthOS application. This video is only for the scenario when you, as the PI, did not create the initial application and someone has sent you a signature request”

Visual Descriptions

- A slide with the EthOS logo and the title of the Training Video: Principal Investigator Signature
- A slide with a screen shot of Question 19.3 showing the Request Signature button

00:18 Narration

“When your signature is requested, you receive an email notification. Don’t forget to check your ‘other’ or junk folder in case it was sent there. Open the email and from there you can click on the link which will take you to EthOS. You might be prompted to log in first.”

Visual Descriptions

- An email inbox with an EthOS signature request notification
- The user clicks on the hyperlink that is included in the email
- Red overlay text appears on the screen to indicate that this video was recorded in a test site and that your EthOS URL and screen may be slightly different

00:34 Narration

“The link will take you to your Signatures tile in EthOS. If you don’t follow the link from your email, your Signatures tile is always available in your Work Area. To access the application, click View Form.”

Visual Descriptions

- The Signatures tile content is opened and the user hovers over the message line
- The user clicks the Work Area menu button and goes to the EthOS home screen
- The user clicks on the Signature tile and the same list is displayed
- Red overlay text appears on the screen to indicate that this is a sample for demonstration purposes and is not representative of a completed application

- The user clicks the View Form button

00:53 Narration

"You are taken to the first page of the form. From here, I like to go back to the Navigate page to get a sense of the form's various sections. Notice that if I open the Signatures tab the form will show you're your signature is still pending. If I open the Signatures section, this is also true."

Visual Descriptions

- The user is on the first page of the form and scrolls through it
- The user clicks on the Navigate tile and returns to the main page
- The user opens the Signatures tab
- The signature shows as Requested beside the PI's name
- The user returns to the Navigate screen and opens the Signatures section
- The user points out the blue Request Signature button
- The user highlights the text underneath the button that says the signature was requested

01:17 Narration

"To review the application, from the Navigate screen you can pick certain sections to review. Or you can page through page by page."

Visual Descriptions

- The user clicks on the Navigate tab and returns to the main page
- The user hovers over the different sections of the form
- The user starts clicking through the pages

01:27 Narration

"If something needs to change, you will need to reject the signature and send it back to the form owner. You can reject the signature request from any page in the form using the Reject button in the action pane. Follow the prompts to enter your credentials, and also the reason for the rejection."

Visual Descriptions

- The user clicks on the Reject tile in the action pane
- The user enters their username and password in the Reject pop-up window and an example reason for rejection
- The user clicks on the green Reject button

- A green banner message is displayed saying Form Rejected Successfully

01:47 Narration

“After you have rejected the application the status of the signature request will change to ‘rejected’. The form owner will receive an email and an EthOS notification.”

Visual Descriptions

- The user is in the Signatures tile list
- The status shows as ‘rejected’ beside the PI’s name
- A screen shot of the rejection notification that the form owner will receive appears

02:00 Narration

“When the form owner has made the changes, you’ll get another signature request. Open the email and click the link.”

Visual Descriptions

- The user is in their email inbox and opens the EthOS signature request notification
- The user clicks on the link
- Red overlay text appears on the screen to indicate that this video was recorded in a test site and that your EthOS URL and screen may be slightly different

02:10 Narration

“The link will take you to the Signatures tile. Remember, if you don’t use the email link, you can always find your signature requests from the Signature tile in your work area. Click View Form to open the application.”

Visual Descriptions

- The user is on the Signatures tile list
- The user clicks on the Work Area menu and returns to the main screen and opens the Signature tile
- The user clicks on the View Form button and the main page is displayed

02:26 Narration

“Review the application. When you are on the final page, you will notice this Request Signature button – which can be a little confusing – but beneath it you will see that your signature has already been requested.”

Visual Descriptions

- The user is on the main page and begins to page through a few pages until they reach the Signatures page
- The user hovers over the blue Request Signature button
- Red overlay text appears beside this button saying 'don't be confused by this button'
- The user highlights the blue message underneath that indicates that the signature has been requested
- Red overlay text appears saying 'look for this light blue banner line instead'
- because the user is highlighting the fact that underneath you can see that the signature has already been requested

02:45 Narration

"In the action pane, look for the Sign button – which will be visible from any page in the application - and follow the prompts to confirm that you wish to sign the form."

Visual Descriptions

- The user clicks on the Sign tile in the actions pane
- The Signature Declaration window opens and the user clicks on the accept button and then confirms again by clicking on the Yes button
- A green banner message is displayed saying Form Signed Successfully

03:05 Narration

"When you've signed a form, the signature request changes to 'signed'. The form is queued for submission. Sometimes it can take a few minutes for the submission status to update, but the email – to you, the Form Owner, and anyone with a Co-I role, is your confirmation that all was submitted successfully. If in doubt, check the application ten minutes later to see that the status is now Submitted."

Visual Descriptions

- The user is on the Signatures tile; the signature line now says 'signed'
- The Form Queued For Submission page appears
- There is a screen shot of the inbox and confirmation email being sent to the PI
- The screen dissolves into another screen shot showing the form in a Submitted status

03:31 Narration

"As always, remember to visit the EthOS hub for system access and all other support materials."

Visual Descriptions

- The user searches the University of Guelph website for EthOS
- The EthOS hub opens
- The user scrolls down to show the different tiles and sections of the EthOS hub site

03:38 Narration

(Over background music) "And reach out to RAIMSSupport@uoguelph.ca anytime for any questions. Thanks for watching and have a great day!"

Visual Descriptions

- The EthOS slide with the RAIMSSupport@uoguelph.ca email listed
- The words 'Thanks for watching' are at the top right of the slide
- The words 'Reach us anytime for questions for feedback' are in the middle of the slide
- The words 'We're here to help' are on the bottom of the slide