

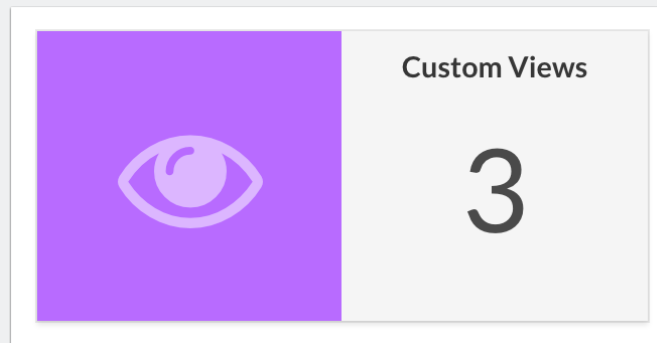
Online Investigator's Guide | Admin User Documentation

Analytics

This is the dashboard introduction. Here are the statistics and an explanation of the analytics.

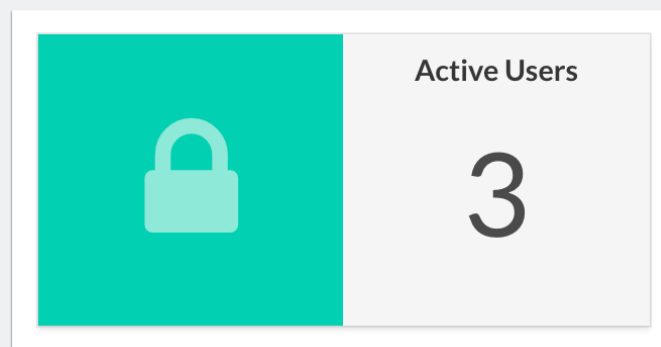
Custom Views

The number of views that have been created amongst the active user base.



Active Users

The number of users who have used their Emory login to access the website.






Online Investigator's Guide | Admin User Documentation

Broken Link Checker

The Broken Link Checker in the Dashboard crawls every page and child page within the Online Investigator's Guide and detects the HTTP response for the links within that page. This report runs on demand and will take a few minutes to run. **You must remain on the Dashboard page for the report to complete successfully.**


The report produces the following information:

1. Page Title
 - Administrative title of the page with the broken link
2. Link Text
 - Text entered within the editor that is resolving to a broken link
3. Bad URL
 - The URL that is resolving as a broken link
4. Error Codes
 - The code that the crawler sends back

Broken Links				Updated on 01/05/2018 at 04:14PM
	PAGE TITLE	LINK TEXT	BAD URL	ERROR CODE
	Testing for Dead Links	School of Medicine Additional Opportunities	http://medicine.emory.edu/research/funding-opportunities/index.html	404 => Net::HTTPNotFound for...
	Testing for Dead Links	https://sam.emory.edu/	https://sam.emory.edu/	connection refused: sam.emory.edu:443
	Page Parent	Dead Link	http://thisisbrokenlink.com/	Failed to open TCP connection to...
Rerun Report				

Online Investigator's Guide | Admin User Documentation

Last Time Updated


Broken Links			
Updated on 01/05/2018 at 04:14PM			
PAGE TITLE	LINK TEXT	BAD URL	ERROR CODE
 Testing for	School of Medicine Additional	http://medicine.emorv.edu/research/funding-	404 => Net::HTTPNotFound for...

Edit Page

Click the Pencil next to the Page Title to open a new browser window and edit the offending page. **Note: you will need to rerun the Broken Link Checker for the report to update.**

Refreshing Report

To refresh the report, select Rerun Report from at the bottom of the report table. **It will take a few minutes to run and you must remain on the Dashboard page for the report to complete successfully.**

 Page Title	Bad Link	http://www.brokenlink.com/	Failed to open for connection to...
Rerun Report			

Error Codes

1. **404 => Net::HTTPNotFound for <bad URL> -- unhandled response**

Online Investigator's Guide | Admin User Documentation

- The HTTP 404 Not Found Error means that the webpage you were trying to reach could not be found on the server. It is a Client-side Error which means that either the page has been removed or moved and the URL was not changed accordingly, or that you typed in the URL incorrectly.

2. **connection refused: <bad URL>:443**

- This error code results in attempting to access a secured website on port 443. You specifically need to use "https://" when accessing these sites.

3. **Failed to open TCP connection to <bad URL>**

- This URL doesn't exist and can not be reached.

Online Investigator's Guide | Admin User Documentation

Survey Templates

A Survey Template is the questionnaire that the user will fill out to create their custom view. The system allows multiple survey templates to be created, however the survey template marked as **default** will be the only survey that is displayed to the user.

The action enabled on a survey template are:

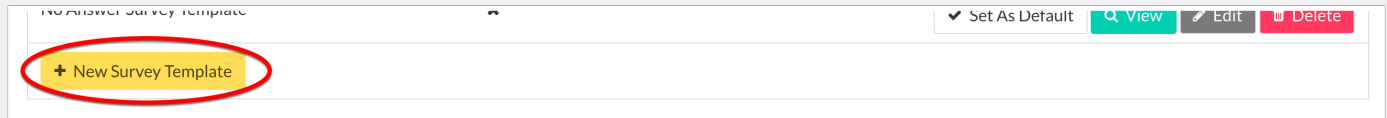
1. Set a default survey template
2. View a survey template
3. Edit survey template
4. Delete survey template
 - A default template is necessary and you can not delete a survey template if it is set as default. You will not be able to delete a survey template if there is only one.

Survey Templates		
NAME	DEFAULT	ACTIONS
2-Question Survey	✗	<input checked="" type="checkbox"/> Set As Default View Edit Delete
1-Question Survey	✗	<input checked="" type="checkbox"/> Set As Default View Edit Delete
New Investigator View	✓	<input checked="" type="checkbox"/> Set As Default View Edit Delete
No Question Survey Template	✗	<input checked="" type="checkbox"/> Set As Default View Edit Delete
No Answer Survey Template	✗	<input checked="" type="checkbox"/> Set As Default View Edit Delete
+ New Survey Template		

Online Investigator's Guide | Admin User Documentation

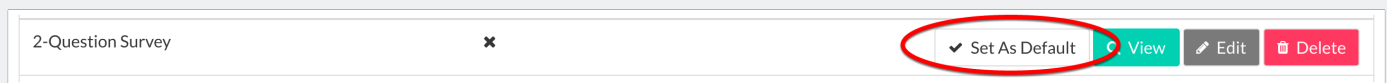
Adding New Survey Template

For details on Survey Template form, see [Adding or Editing a Survey Template](#)



Setting a Default Template

To change the default template, select Set As Default button.



Online Investigator's Guide | Admin User Documentation

View Survey Template

Viewing a Survey Template will show you:

1. Questions
2. Answers
3. [Labels mapped to answers](#)

Name: New Investigator View[⌂Back to All Survey Templates](#)

1

1. Is your research funding

A. Federal

2

federal funding

3

B. Non-Federal / Industry

industry funded

2. Does your work involve research activities at any of the Emory Affiliates below?

A. Grady Hospital

grady

B. Veteran's Administration Hospital

va hospital

C. Children's Hospital of Atlanta

choa

D. Georgia Institute of Technology

ga tech

Edit

Adding or Editing a Survey Template

When adding or editing an existing survey template, you can configure the following options:

1. Survey Name
 - The User will see this name when they are filling out their survey.

Online Investigator's Guide | Admin User Documentation

2. Default Template
 - Toggle Default template
3. Add New Question
 - Each Survey Template requires as least one question
4. Question Text
5. Question Type
 - Multiple = Checkbox
 - One = Radio Button
6. Remove Question
7. Add Answer to Question
 - Each Question requires as least one answer
8. Question Text
9. Select Labels
 - Content is mapped to specific labels. Selecting labels on this page will determine which content shows up when the user answers the question with that specific answer.
10. Remove Answer
11. Save Survey Template

Online Investigator's Guide | Admin User Documentation

The screenshot displays the 'New Investigator View' configuration interface. It includes a 'Name' field (1), a 'Default Template' checkbox (2), and a 'Question' section (6) with a text input (4) and a dropdown for 'How many answers can this question have?' (5). Below the question are two 'Answers' sections. The first answer (8) is 'Federal' and has a 'Labels to show' list (9) including 'label1', 'label2', 'label3', 'label4', 'federal funding' (highlighted), 'industry funded', 'grady', 'va hospital', 'choa', and 'ga tech'. The second answer (10) is 'Non-Federal / Industry' and has a 'Labels to show' list including 'label1', 'label2', 'label3', 'label4', 'federal funding', 'industry funded' (highlighted), 'grady', 'va hospital', 'choa', and 'ga tech'. At the bottom are buttons for '+ Add Answer' (7), '+ Add Question' (3), and 'Save Survey Template' (11).

Labels

Labels are used to group content that can be mapped to a survey template answer. If the survey template answer is mapped to a label, only the content with that label will show up if the user has selected that specific answer.

The following actions can be done on labels:

Online Investigator's Guide | Admin User Documentation

- 1. Edit Existing Label
 - Editing an existing label will not change any content or answers you have linked
- 2. Delete Label
- 3. Add New Label

Labels

NAME	ACTIONS
federal funding	<div><div>1</div><div>Edit</div><div>Delete</div><div>2</div></div>
industry funded	<div><div>Edit</div><div>Delete</div></div>
grady	<div><div>Edit</div><div>Delete</div></div>
va hospital	<div><div>Edit</div><div>Delete</div></div>
choa	<div><div>Edit</div><div>Delete</div></div>
ga tech	<div><div>Edit</div><div>Delete</div></div>
<div><div>3</div><div>+ New Label</div></div>	

Online Investigator's Guide | Admin User Documentation

Pages

Pages are the primary content of the website. Pages can be nested within other pages (up to 4 levels deep), allowing granularity when mapping to labels and specific survey answer questions.

Pages			
PAGE TITLE	MODIFIED DATE	POSITION	ACTIONS
Introduction	12/11/17	1 ▼	+ Child View Edit Delete
Subpage Title	01/05/18	1 ▼	+ Child View Edit Delete
2nd Subpage Title	01/05/18	2 ▲	+ Child View Edit Delete
Third level title	12/21/17	1	+ Child View Edit Delete
4th Level Title	01/05/18	1	+ Child View Edit Delete
Where do I start?	12/20/17	2 ▲ ▼	+ Child View Edit Delete
Contact to Get Started	12/20/17	1 ▼	+ Child View Edit Delete
Apply for funding	12/20/17	2 ▲ ▼	+ Child View Edit Delete
Databases for External Funding	12/21/17	1 ▼	+ Child View Edit Delete
+ New Page			

Adding New Page

When Adding New page, you can configure the following options:

1. Page Title
 - This is what will show up on the table of contents and the left navigation menu.
2. Page Header
 - This is the large text at the beginning of the section.

Online Investigator's Guide | Admin User Documentation

3. Parent Page
 - If desired, select the parent page from the drop down list.
4. Page Body
 - Content that will show up on the page. For more detailed instructions, visit [Formatting Page Body](#).
5. Label
 - Select labels that will be mapped to answer questions and other content.
Selected labels will turn green.

New Page

⌕ Back to All Page

1

Page Title:

2

Page Header:



3








Parent Page:



No Parent ▾

4

Page Body:

B I  

+ New Label

5

Labels:

federal funding

industry funded

grady

va hospital

choa

ga tech

Submit

Parent Page Structure

1. Parent Page Title
2. Parent Page Title
3. Parent Page Header

Online Investigator's Guide | Admin User Documentation

4. Child Pages
5. Child Page Header
6. Child Page Body

The screenshot displays the 'Apply for funding' section of the documentation. The sidebar on the left contains a 'Table of Contents' with links to 'Introduction', 'Subpage Title', '2nd Subpage Title', 'Where do I start?', 'Contact to Get Started', 'Apply for funding' (highlighted with a circled '2'), 'Staff Resources for Grant Development', 'Chapter 3 Title', 'Chapter 4 Title', and 'Hello Title'. At the bottom of the sidebar is a 'Give us Feedback' button. The main content area shows a breadcrumb trail 'Where do I start? / Apply for funding' with a circled '1'. Below this is a heading 'How do I apply for funding?' with a circled '3'. A list of four items follows: '1. New' (circled '4'), '2. Databases for External Funding', '3. Search for Funding on Free Databases', and '4. Internal Funds'. Below the list is a heading '1. New to Research at Emory?' with a circled '5', followed by three sub-points: 'a. Physician-initiated (PII) Research', 'b. If PII, assistance with proposal development, writing protocol, requesting industry funding.', and 'c. OCR will develop Letter of Intent (LOI) for PIs seeking industry funding.'. A circled '6' is placed next to the sub-point 'b'. Below the sub-points is a heading '2. Are there databases available for me to use to search for external funding?'. A yellow bar is at the bottom of the main content area. A 'Print Page' button is in the top right corner.

Formatting Page Body

The toolbar at the top of the Page Body editor allows you to have full customization over your content. From left to right:

1. Bold Text
2. Italics Text
3. Strikethrough Text
4. Hyperlink Text
5. Enlarge Text
6. Blockquote
7. Lightbulb Text (see example below)
8. Bulleted List

Online Investigator's Guide | Admin User Documentation

9. Numbered List
10. Decrease Indent
11. Increase Indent
12. Undo
13. Redo

Page Body:

B *I* S [Link](#)

7. Example of Lightbulb Text



There are several types of research funding: federal, state, corporations, foundations and internally at Emory. Emory has a number of resources available to assist with locating funding opportunities.

Online Investigator's Guide | Admin User Documentation

Mapping Pages to Labels

Mapping Pages to Labels indicates which pages will show up for a specific answer.

1. Select the flag at the bottom of the page
2. It will turn green to indicate that it is active

To add a new label from this page:

1. Select New Label
2. Enter Text and Select Save
3. The New Label will show up in the labels list

+ New Label

Labels:

federal funding

industry funded

grady

va hospital

choa

ga tech

Online Investigator's Guide | Admin User Documentation

Reordering Pages

Select the appropriate arrow to move the page up or down in the outline

Pages			
PAGE TITLE	MODIFIED DATE	POSITION	ACTIONS
Introduction	12/11/17	1 ▼	+ Child View Edit Delete
Subpage Title	01/05/18	1 ▼	+ Child View Edit Delete
2nd Subpage Title	01/05/18	2 ▲	+ Child View Edit Delete
Third level title	12/21/17	1	+ Child View Edit Delete
4th Level Title	01/05/18	1	+ Child View Edit Delete
Where do I start?	12/20/17	2 ▲▼	+ Child View Edit Delete
Contact to Get Started	12/20/17	1 ▼	+ Child View Edit Delete
Apply for funding	12/20/17	2 ▲▼	+ Child View Edit Delete
Databases for External Funding	12/21/17	1 ▼	+ Child View Edit Delete
+ New Page			

Supporting Units

Supporting Units will appear in the upper right corner of the website on desktop and the footer on mobile devices.

Each supporting unit needs the following information to be valid:

1. Unit
 - This is what will show up in the list
2. Title
 - Used for accessibility purposes

Online Investigator's Guide | Admin User Documentation


3. URL

- URL that the link will direct to

Admin Supporting Units

UNIT	TITLE	URL	
OCR	Office for Clinical Research	http://ocr.emory.edu	Edit Delete
IRB	Institutional Review Board	http://irb.emory.edu	Edit Delete
IACUC	Institutional Animal Care and Use Committee	http://www.iacuc.emory.edu	Edit Delete

[+ New Unit](#)



EMORY UNIVERSITY

Online Investigator's Guide | Office for Clinical Research

[Table of Contents](#)

[Q](#)

Welcome, Sandra [v](#)

SUPPORTING UNITS OCR IRB IACUC

Online Investigator's Guide | Admin User Documentation

User Management

User Management has a comprehensive list of all users that have logged into the website and if they have administrative privileges. This list that can be filtered by NETID or NAME. From this table, you can revoke or grant admin privileges accordingly by selecting the appropriate button next to the user's name.

User Management			
Q Search for users by netID or Name...			
NETID	NAME	IS ADMIN?	
tparri2	Terry Parrish	✓	✕ Revoke Admin Access
sbarre5	Saundra Barrett	✓	✕ Revoke Admin Access
testuser	Terry Parrish	✕	✓ Grant Admin Access
shilli2	Solomon Hilliard	✕	✓ Grant Admin Access
sgray4	Sharon Gray	✓	✕ Revoke Admin Access
tmiles2	Tiffany Miles	✕	✓ Grant Admin Access
scole23	Sherry Coleman	✓	✕ Revoke Admin Access
mcrubez	Monique Crubezy	✕	✓ Grant Admin Access
krwitt2	Kim Battles R-WIT Test3	✕	✓ Grant Admin Access
kscotte	Karen Cotter	✕	✓ Grant Admin Access

Online Investigator's Guide | Admin User Documentation

Site Information

Site Information give you access to modify basic site information as well as place the website into maintenance mode.

Site Information

Maintenance Mode

Off ☐ On

Down for Maintenance

Edit

Scheduled maintenance is currently in progress. Please check back soon. We apologize for any inconvenience. For questions or concerns, please contact me@emory.edu.

About

About This Site

Edit

This site is designed to provide you information that is useful, easy to navigate, and accurate. By asking users a series of questions, the system will use the responses to generate a custom Handbook with content that is most useful to you.

Contact Information

Contact us

Edit

Please contact sgray4@emory.edu with inquiries, suggestions or feedback.

Branding Information

Online Investigator's Guide | [Office for Clinical Research](#)

Edit

Maintenance Mode

Maintenance Mode is to be used when the site needs to be inaccessible to the user.

Online Investigator's Guide | Admin User Documentation

1. Use the Toggle Switch to turn maintenance mode off or on
2. To edit the maintenance message that the End User will see, select Edit.
 - We recommend customizing your message to the end user with an indication of when the site will be out of maintenance mode
3. When maintenance mode is on, there will be an indicator at the top of the screen within the administrative portal
 - You can turn off maintenance mode from this indicator by clicking "Turn off maintenance mode"
4. When maintenance mode is on, every page for the end user will deliver your maintenance message

The screenshot displays the admin interface for the Online Investigator's Guide. At the top, a 'Maintenance Mode' section features a toggle switch (labeled '1') currently set to 'Off', and an 'Edit' button (labeled '2'). Below this, a 'Down for Maintenance' message is shown, indicating scheduled maintenance and providing contact information (me@emory.edu).

The main content area shows the user-facing view of the site. A yellow banner at the top (labeled '3') states 'Site is in Maintenance Mode. Turn off maintenance mode.' Below this, the Emory University logo and name are visible, along with the title 'Online Investigator's Guide | Office for Clinical Research'. A 'Table of Contents' link is present on the left, and a search bar and user greeting 'Welcome, Sandra' are on the right. A large yellow box in the center (labeled '4') displays the 'Down for Maintenance' message to the end user, including the same contact information.

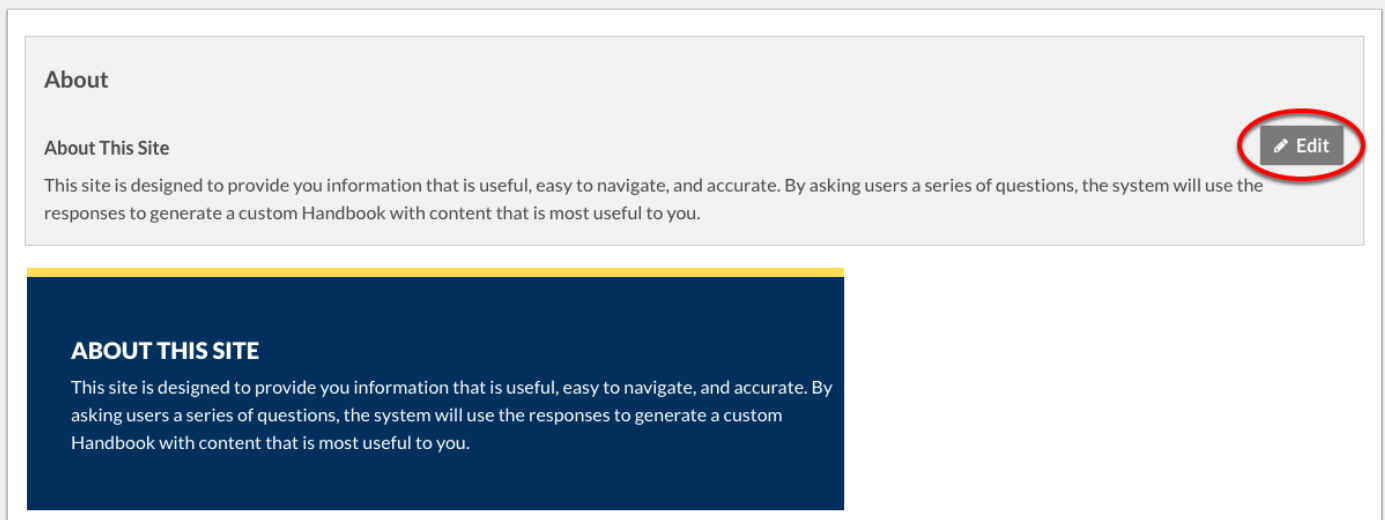
Online Investigator's Guide | Admin User Documentation

About

This introduction text can be found within the page footer at the bottom of the page.

To edit about:

1. Select Edit
2. Edit Header
3. Edit Body
 - **Links are allowed**
4. Save



Contact Information

Contact Information can be found within the page footer at the bottom of the page.

To edit contact information:

1. Select Edit
2. Edit Header

Online Investigator's Guide | Admin User Documentation


3. Edit Body
 - **Links are allowed**

4. Save

Contact Information

Contact us

Please contact sgray4@emory.edu with inquiries, suggestions or feedback.



CONTACT US

Please contact sgray4@emory.edu with inquiries, suggestions or feedback.

Online Investigator's Guide | Admin User Documentation

Branding Information

Branding information is found within the page header at the top of page.

To edit branding information:

1. Select Edit
2. Edit Text
 - **Links are allowed**
3. Save

