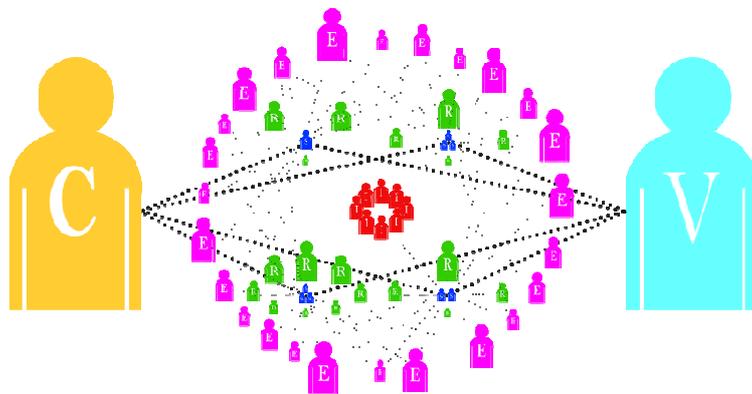


# The Health Research Portal



## Web System User-manual

*Reviewer version*

*July, 2014.*



## PREFACE & RECOMMENDATION

The Health Research Portal (HRP) is an *integrated online health research management system* that offers substantial benefits for all stakeholders in health research. The Portal aims to improve accountability, efficiency and quality of health research conducted in a country by providing information on all ongoing research and hence increasing transparency and by streamlining the ethics review process.

The Portal can be used to:

- **Submit research proposals** for review to one of the ethics committee of the country, 24x7, from anywhere. Researchers need to register on the Portal. Once registered, you will have a permanent account and be able to submit research proposal in a paper-less way and to track the review status of your proposals.
- **Search ongoing and completed health research** from the launch of the system onwards through a publicly accessible research registry. No registration or log-in is required to search the ongoing research.
- **Access complete research reports** for the researches started since the launch, once the research is completed.
- **Access information on all the applicable guidelines, rules, and regulations** related to health research.
- **Access a “Researchers’ Directory”** containing information on the national and international researchers doing research in the country.

The HRP is designed like a social network; most of its contents and features are available only to registered users. Once registered each user possesses one or multiple roles such as investigator, secretary of a committee, reviewer... You can only choose yourself to have the investigator role. The other roles are assigned or by the administrator of the system, or by a secretary of a review committee.

Here is a short description of each role:

- **Investigator:** The investigator role allows you to submit research proposals to a review committee. You will then be able to track the review process of your proposals as, once approved, submitting the post-approval documents related to your research (completion report, protocol amendment, raw data...). You have full access only to your own proposals. You may not be yourself one of the investigators of the research; this role will not restrain you to submit proposals in behalf of the investigator(s). You will however be the key person in relation with the ethics committee.
- **Secretary:** The secretary role allows you to manage your ethics committee, the review of the proposals and to organize meetings. You have full access only to the proposals submitted to your committee.
- **Committee Member:** The committee member role allows you to review the research proposals as to get information about your committee meetings. You have full access only to the proposals you have been assigned to review by your secretary and the proposals subject to your committee meetings.
- **External Reviewer:** The external reviewer role allows you to review the research proposals you have been assigned to. You have full access only to these proposals.
- **Coordinator:** The coordinator role allows you to generate reports about every proposals submitted to the HRP. You do not have full access to any proposals.

In order to make your training easier, this user's guide will use screenshots of the website. A glossary is present at the end of this manual.

We strongly recommend you to always pay attention to your notifications. These ones possess a lot of information addressed to you and not always specified with another way.

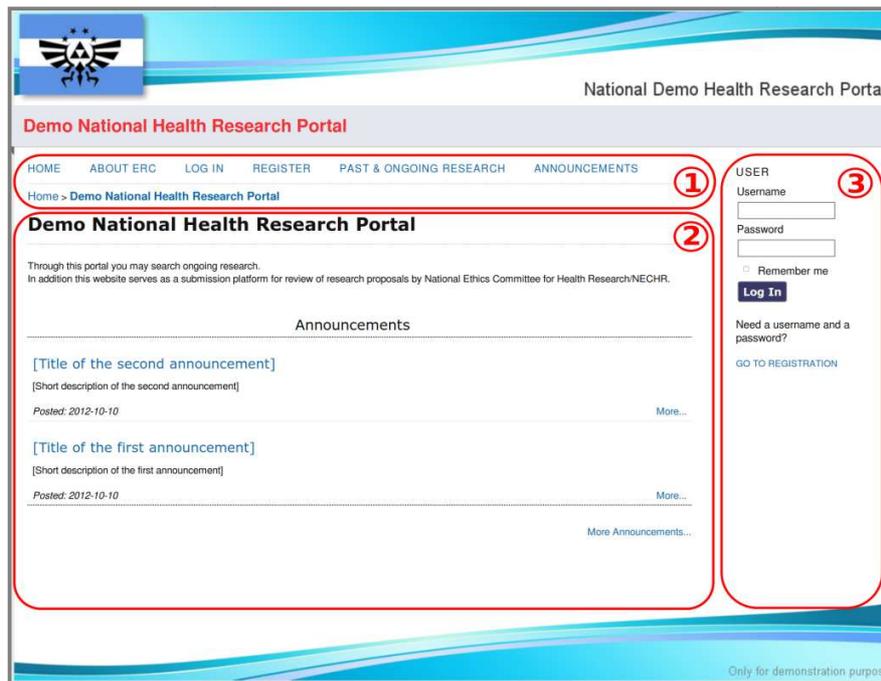
For a global comprehension of the Health Research Portal please refer to the operating diagram in the back cover of this user-guide.

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## I. COMMON AREAS

### I.1 NAVIGATING THE SYSTEM



All the WebPages of the Health Research Portal are composed of the same header, access point to the main WebPages of the portal (*frame 1 of the above example*), and right column (*frame 3 of the above example*).

The variable part of all WebPages, which contains specific information, is therefore at their centre (*frame 2 of the above example*). On the top of this part is your current position in the arborescence of the website. The second line is the title of the webpage.

### *1.1.A THE HEADER*



The header is the access point to the main WebPages of the website. This header, present on the top of absolutely every WebPages of the website, is composed of various “tabs” (main links). Click on one of this tab to access to the concerned main webpage:

- **Home:** You will access the Home Page of the website. It contains the welcome message and last announcements made by the committees.
- **Governance & Policies:** This webpage contains divers information concerning the different policies in the country: like the Ethics Review Committee(s), the Standard Operating Procedures or User Guides for the system.
- **Log In:** If you possess an account within this website you can log in through this webpage.
- **Register:** If you don't possess any account within this website you can register through this webpage.
- **Research Registry:** Via this tab you can access to all the past & ongoing health researches in the country.
- **Announcements:** By clicking on this tab you will access to all the announcements made by the Ethics Review Committee(s).

If you possess an account within this website and are “logged in”, the header slightly change:



The tab “User Home” replaces the two tabs “Log In” and “Register”. This new tab allows you to access to all the functionalities gave to your account. As an example, if you are an investigator/researcher and want to submit a research proposal, you should find a link on this webpage.

### I.1.B THE RIGHT COLUMN

If you possess an account, the Right Column allows you to log in/out within the website.

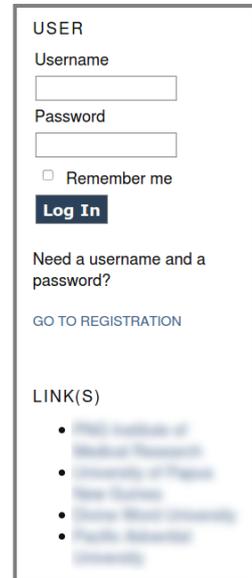
To log in you need to type your username and your password in the appropriate fields. Please click on the “Log In” button to validate your data. Before clicking on this button you can choose to check the “Remember me” box by clicking on it. This allows your computer to remember your username and password. We strongly recommend you to check this box **ONLY** on your personal computer.

If you don’t possess any account within the website, please click on the “Go to Registration” link in the bottom of this right column for registering into the website.

Once logged in you can log out anywhere you are by clicking on the “Log Out” link present on the right column. We highly recommend you to log out each time you leave your computer.

Above the “Log Out” link, the “My Profile” link allows you to access to all your information and to modify them (your mail address, phone number, password...).

Under the user’ information is the notification section. A notification is a short personal message addressed to you. By clicking on the “View” link you access to all your notifications. The message in brackets on the right of the link specifies the number of notifications you never read. In the opposite example the user, with the user has 4 unread notifications. We recommend you to always be careful to read your notifications.



USER

Username

Password

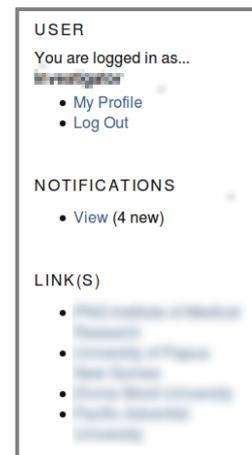
Remember me

**Log In**

Need a username and a password?  
[GO TO REGISTRATION](#)

LINK(S)

- [My Profile](#)
- [Log Out](#)
- [Forgot Password](#)
- [Create Account](#)



USER

You are logged in as...  
 **username**

- [My Profile](#)
- [Log Out](#)

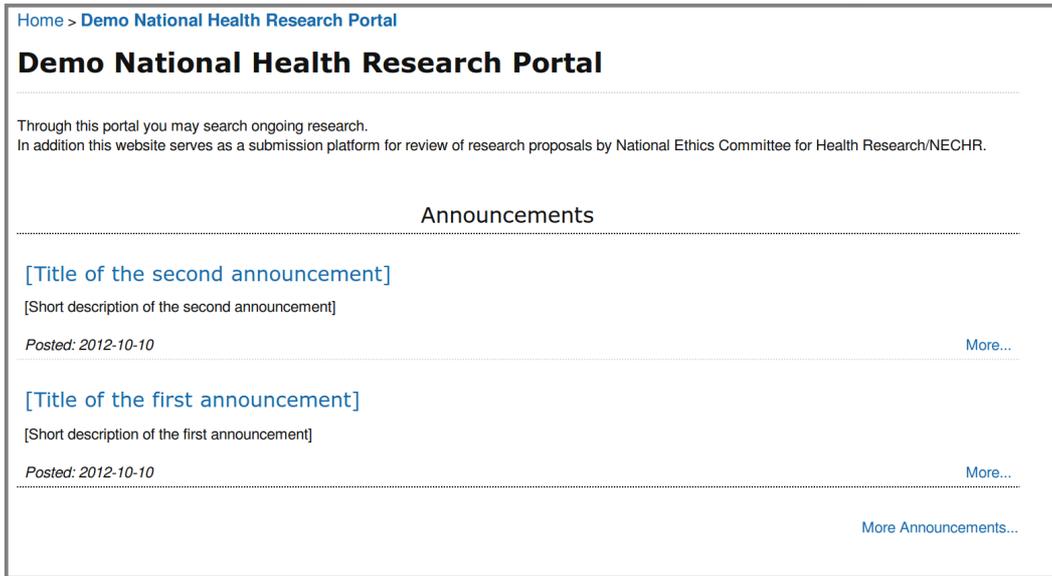
NOTIFICATIONS

- [View \(4 new\)](#)

LINK(S)

- [My Profile](#)
- [Log Out](#)
- [Forgot Password](#)
- [Create Account](#)

## 1.2 HOME PAGE



The screenshot shows the home page of the Demo National Health Research Portal. At the top, there is a breadcrumb trail: "Home > Demo National Health Research Portal". Below this is the main heading "Demo National Health Research Portal". A paragraph of text explains the portal's purpose: "Through this portal you may search ongoing research. In addition this website serves as a submission platform for review of research proposals by National Ethics Committee for Health Research/NECHR." The page is divided into sections by dotted lines. The "Announcements" section contains two entries. Each entry consists of a blue title link, a short description, a "Posted: 2012-10-10" date, and a "More..." link. At the bottom right of the announcements section, there is a "More Announcements..." link.

This is the home page of the Health Research Portal.

After a brief introducing message the Home page of the website shows the latest announcements made by the Ethics Review Committees. Please click on the title of one of the announcements or on the “**More...**” link to know more about it. You can access to all the announcements with the “**More Announcements...**” link.

## 1.3 GOVERNANCE & POLICIES

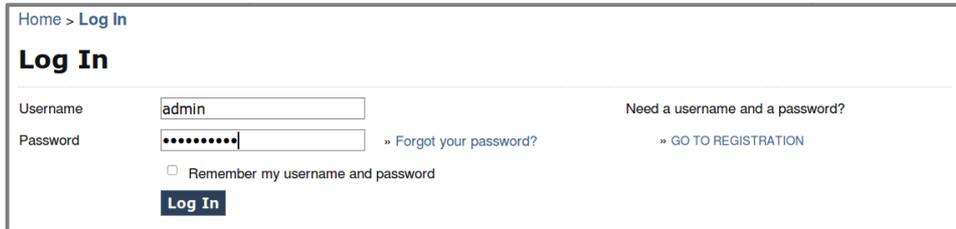


The “**Governance, Policies, and Procedures for Health Research**” main web-page gives you information on the diverse governance and policies about health research in the country, and about this web system.

By Navigating using the header links (*Please refer to the above screenshot*) you should be able to obtain information about:

- The Governance of Health Research
- The Ethics Review Committees and their policies
- How to obtain grants
- The diverse documents shared to you (Standard operating procedures, User manuals for this system...)
- And the contact and links

## 1.4 LOG IN



The screenshot shows a web page titled "Log In" with a breadcrumb "Home > Log In". The page contains a login form with the following elements: a "Username" field with the text "admin", a "Password" field with masked characters "\*\*\*\*\*", a "Remember my username and password" checkbox, a "Log In" button, a "Need a username and a password?" link, a "Forgot your password?" link, and a "GO TO REGISTRATION" link.

Before any actions as an Investigator, a Secretary or a Reviewer, you need to “log in” the website. To “log in” allows the website to understand who you are and therefore which possibilities to offer you.

You need to type your username and your password in the appropriate fields. You will then need to validate these data by clicking on the “**Log In**” button.

Before clicking on the “**Log In**” button you can choose to check the “**Remember my username and password**” box by clicking on it. This allows the computer you are using to remember your username and password. If you want so, we strongly recommend you to check this box **ONLY** on your own personal computer.

If you don’t remember your username or password please click on the “**Forgot your password?**” link.

If you don’t have any username or password (i.e. if you are not registered into the Health Research Portal) you can register by clicking on the “**Go to Registration**” link.

### I.4.A REGISTERING

To register into the Health Research Portal you are requested to fill this form. A star (“\*”) denotes a required field.

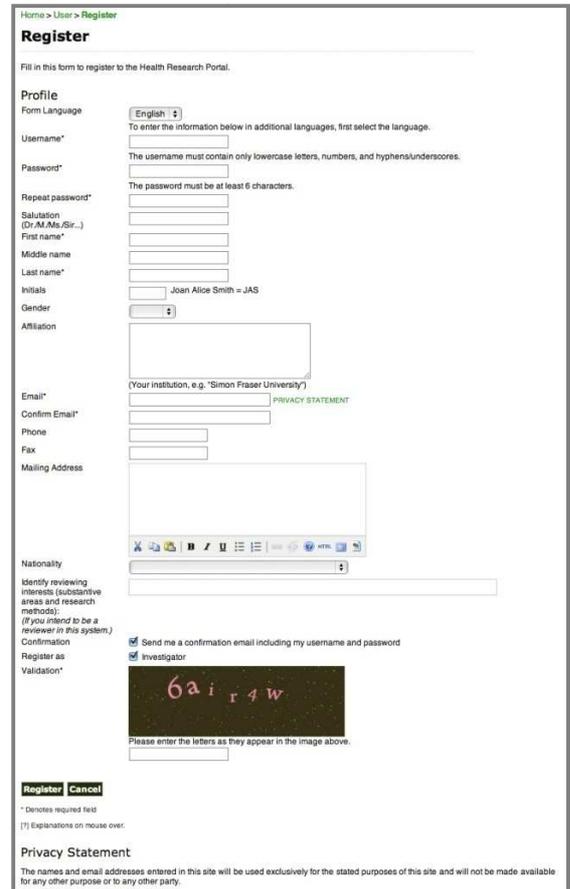
Are required fields:

- The username. It must contain only lowercase letters, numbers and hyphens/underscores. A username is a name that uniquely identifies someone on a computer system. It is the only information in this form that will not be able to change.
- The password. It must be at least 6 characters. A password is a string of characters used for authenticating a user on a computer system. In order to verify you entered the desired password you are request to enter it twice (once in each password field).
- Your first name.
- Your last name.
- Your email address (you are also requested to enter it twice).
- The validation: Please enter the characters that appear in the image above this field.

Before finishing your registration, two options are available.

- If you want to receive a confirmation email including you username and password please check the “Confirmation” box.
- If you plan to use the Health Research Portal as an Investigator (i.e. for submitting proposals) please check the “Investigator” box.
- If you plan to use the Health Research Portal as a reviewer, please enter your reviewing interests. This will greatly help the review committees on their work. Please validate each interest by pressing the "Enter" or the "Comma" key.

For finishing the submission please click on the “**Register**” button. If you want to leave this page without registering please click on the “**Cancel**” button.



Home > User > Register

### Register

Fill in this form to register to the Health Research Portal.

**Profile**

Form Language: English

To enter the information below in additional languages, first select the language.

Username\*

The username must contain only lowercase letters, numbers, and hyphens/underscores.

Password\*

The password must be at least 6 characters.

Repeat password\*

Salutation (Dr./M./Ms./Sir...)

First name\*

Middle name

Last name\*

Initials  Joan Alice Smith = JAS

Gender

Affiliation

(Your institution, e.g. "Simon Fraser University")

Email\*

Confirm Email\*

Phone

Fax

Mailing Address

Nationality

Identify reviewing interests (substantive areas and research methods): (If you intend to be a reviewer in this system.)

Confirmation  Send me a confirmation email including my username and password

Register as  Investigator

Validation\*

Please enter the letters as they appear in the image above.

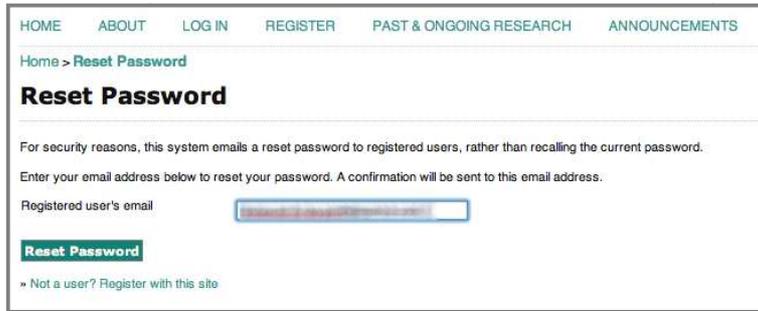
**Register** **Cancel**

\* Denotes required field  
[!] Explanations on mouse over

**Privacy Statement**

The names and email addresses entered in this site will be used exclusively for the stated purposes of this site and will not be made available for any other purpose or to any other party.

### I.4.B FORGET YOUR PASSWORD?

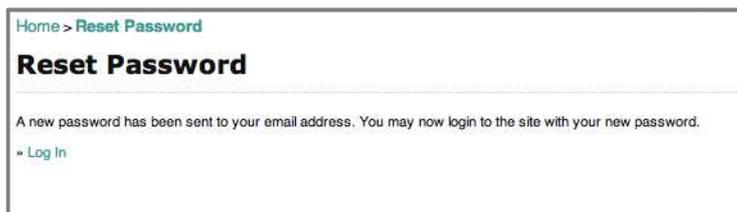


If you forgot your username or your password you can reset it on this subpage (*click on the “Forgot your password?” link into the “Log In” main webpage*).

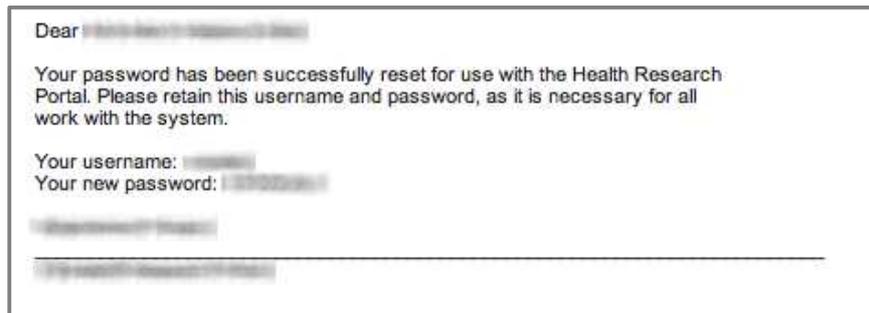
Enter your email address in the appropriate field (the one you used to register within the portal) and click on the **“Reset Password”** button. A confirmation email will be send to your email address.



This confirmation email contains a link, if you really want to reset your password, please click on this link.



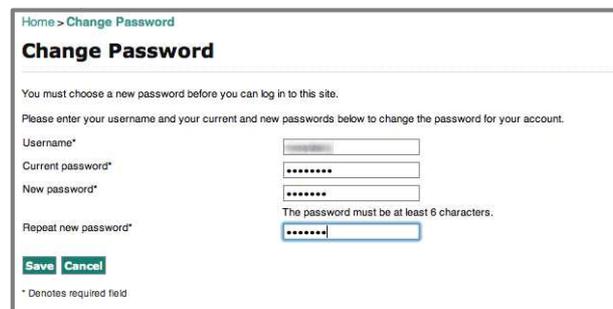
By clicking on the link you directly arrive on the above webpage. This is just to confirm you that your password has been reset and send with a new email to your email address.



For the rest of this explanation, we will call the password included in this email "resetPassword". You can now go to the Health Research Portal and try to log in.



Once on the login page of the Health Research Portal (or you can use the right column), on the username field, you should provide your username, on the password field, you should provide the "resetPassword", the password included in the email of the precedent step. Please click on Login.



Because you asked to reset your password, the first time you login the above page appear. It is for suggesting you to choose your own new password :

- A) On the username field, you should provide your username.
- B) On the current password field, you should provide the "resetPassword"..
- C) On the new password field, you should provide the new password you desire. You are free to choose any password you want. We will call it "newPassword"
- D) On the repeat new password field, you should provide again "newPassword". You should type exactly the same as in the step E.
- E) Please click on save.

If you don't have any username or password (i.e. if you are not registered into the Health Research Portal) you can register by clicking on the "**Go to Registration**" link on the right column.

## 1.5 RESEARCH REGISTRY

You may search health researches or investigators registered in the Health Research Portal using this main webpage. By default it will show you the researches webpage. You can always switch between the registry of investigators and the registry of researches by using the links "**Research**" and "**Investigators**" on the top of the page.



### 1.5.A RESEARCHES



The search engine allows you to search a past of ongoing research by typing a title or keyword(s). It also allows you to frame your search by dates, geographical area or status of the research. Take note that even though a combination of search criteria refines your search, each of them can be used alone and none of them will start a global research.

Once your search criteria settled, a click on the "**Search**" button launch the search and display the results.

If you want to launch a fresh research, you can clear the criteria by clicking on the link "**Clear Fields**".

Search : 12 result(s).

TITLE	KEY IMPLEMENTING INSTITUTION	GEOGRAPHICAL AREA	RESEARCH FIELD	DATES OF RESEARCH	STATUS
<a href="#">[Title]</a>	[Institution]	[Area]	[Field]	[Dates]	Ongoing
<a href="#">[Title]</a>	[Institution]	[Area]	[Field]	[Dates]	Ongoing
<a href="#">[Title]</a>	[Institution]	[Area]	[Field]	[Dates]	Completed Download Final Report

Results are presented in the form of a table composed of 6 columns: the title of the research, the key implementing institution, the geographical area(s), the research field(s), the dates of the research and the status. By clicking on the title of a research you can access its information.

If the research has been completed, you can download its final report by clicking on the **"Download Final Report"** link on the right of the concerned research.

You can export the results of your search in a ".csv" format by clicking on the **"Export Search Results"** link.

Please check fields you would like to export.

**Investigators:**

Full Name       Affiliation

**Metadata:**

Scientific title       Public title       Research field(s)       Research Domain(s)

Proposal Type       Dates of research       Geographical Area(s)

Key Implementing Institution       Data Collection       Status

If student research, Institution & Academic Degree

**Export**

Once you clicked on the **"Export Search Results"** link, a new part of the webpage appears. This one allows you to "customize" your exportation. Please check the fields you would like to export (click on the concerned box) and click on the **"Export"** button. You can hide this new part by clicking on the **"Hide Export Options"** link.

### *1.5.B INVESTIGATORS DIRECTORY*

The investigators directory shows you a list of all the investigators registered into the HRP. These investigators are grouped by email. Therefore, if an investigator has been registered with multiple emails, this one will be presented multiple times in the list.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z **A** I I

You can search a specific investigator by the first letter of his/her last name. If you wish so, please click on the concerned letter. By default, all the investigators are shown.

NAME	AFFILIATION	RESEARCH FIELD(S)
<a href="#">John, John</a>	WHO-WPRO	Accidents and Injuries, Nutrition
<a href="#">David, David</a>	WHO	Accidents and Injuries
<a href="#">David, David</a>	WHO-WPRO	Accidents and Injuries, Maternal, Health Care Personnel Education, Child Health, Oral

By clicking on the name of an investigator, you will access his/her details, including links to all the research proposals registered in this system where he/she is involved.

## 1.6 ANNOUNCEMENTS



Home > [Announcements](#)

### Announcements

---

[Title of the second announcement]  
[Short description of the second announcement]  
*Posted: 2012-10-10* [More...](#)

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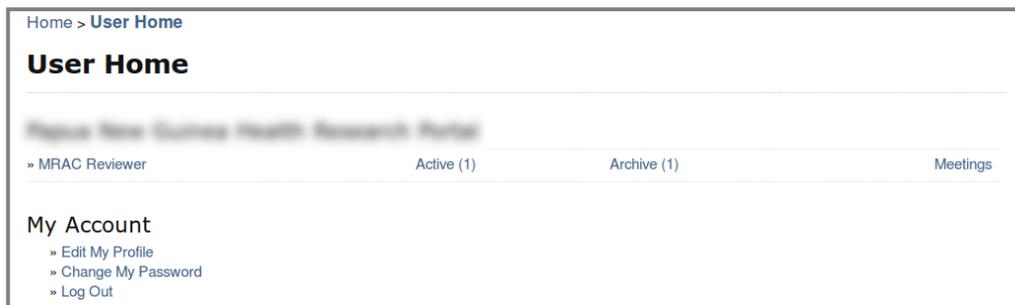
[Title of the first announcement]  
[A short description of the first announcement]  
*Posted: 2012-10-10* [More...](#)

1 - 2 of 2 Items

Through this page you can access to announcements made by the Ethics Review Committees. They are ordered from the most recent to the oldest. By clicking on the “**More...**” link you can access to the whole announcement.

## II. REVIEWER

### II.1 USER HOME



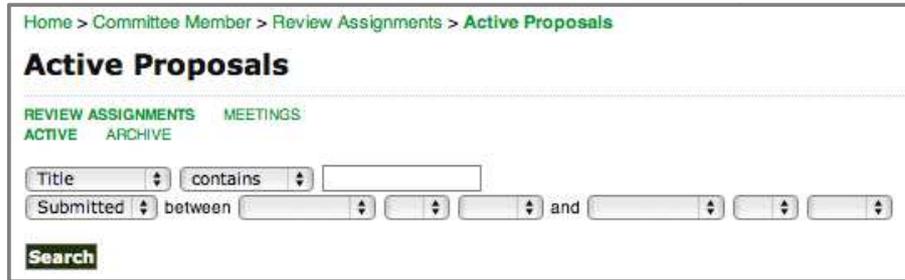
Once “logged in”, this webpage is available anywhere you are on the website by clicking on the “**User Home**” header tab.

On your “User Home” main page you have different action possible:

- You can access to your all your review assignments by clicking on the “**Reviewer**” link on the left or by clicking on the “**Active**” link. On the side of this link is in parentheses the number of concerned submissions.
- You can access to all your past review assignments by clicking on the “**Archive**” link. On the side of this link is in parentheses the number of concerned submissions.
- You can access to all the meetings you have been invited by clicking on the “**Meetings**”

The “My Account” section allows you to edit your profile information, to change your password or to log out.

## II.2 YOUR REVIEW ASSIGNMENTS



Home > Committee Member > Review Assignments > Active Proposals

### Active Proposals

REVIEW ASSIGNMENTS MEETINGS  
ACTIVE ARCHIVE

Title contains [ ]  
Submitted between [ ] and [ ]

**Search**

This is the “Proposals” webpage of a Reviewer. When you log in you access directly to this webpage (except if you have more than one role). By default it shows your active proposals. The active proposals are proposals you are assigned to review.

You can navigate between your active proposals, your archived proposals and the meetings by using the “**Active**”, “**Archive**” and “**Meetings**” links on the top of this page.

In case of a lot of proposals you may search a specific review assignment by using the searching tool on the top of this page. Type a keyword/title and/or frame your search by dates and launch your search by using the “**Search**” button.

ACTIVE PROPOSALS					
ID	MM-DD ASSIGNED	TITLE	MM-DD DUE	MM-DD CONFIRMED	RECOMMENDATION
[REDACTED]	October 14, 2012	[REDACTED]	November 6, 2012	October 14, 2012	—
[REDACTED]	October 15, 2012	[REDACTED]	November 5, 2012	—	—

2 active submission(s)

The active and archived table concerns all your review assignments current or past. They are composed of 6 columns:

- **PROPOSAL ID:** The identification code of the proposal (*for more information see chapter: Miscellaneous – Understanding Proposal’s ID*).
- **ASSIGNED:** The date when you have been assigned to review the proposal.
- **TITLE:** The title of the proposal.
- **DATE DUE:** You are requested to complete the review of the proposal before this date.
- **CONFIRMED:** The date you confirmed to review the proposal.
- **RECOMMENDATION:** Your recommendation.

Please click on the title of a proposal for beginning or continuing its review.

## II.3 REVIEWING A PROPOSAL

The secretary of your committee has informed you of a new review assignment of a proposal. You have seen it with an email or a notification, or in your “Submissions” webpage. You have three ways to access to the review webpage of the proposal:

- By clicking on the specific link included in your email.
- By clicking on the “**View**” link on the right of your notification.
- By clicking on the title of the concerned proposal in your “Submissions” webpage.



A review assignment is composed of 2 subpages: the “**Summary**” and the “**Review**”. You can easily switch between these subpages by using the links on the top of the page (*please refer to above screenshot*). The “Summary” subpage allows you to have access to all the metadata provided. The “Review” subpage allows you to complete the review.

The first section of both subpages concerns the main information of the proposal. You have the proposal ID, the title, and the ethics committee. The second section “Files” also includes in both subpages, allows you to download the files of the proposal. Please click on a file to download it.

Review Schedule	
Secretary's Request	December 20, 2013
Your Response	—
Review Submitted	—
Review Due	January 3, 2014

The third section “Review Schedule” of the review subpage gives information on your review assignment.

### Review Steps

- Notify the secretary(ies) as to whether you will undertake the review.  
Response  Will do the review  Unable to do the review
- Click on file names to download and review (on screen or by printing) the files associated with this proposal.
- Click on icon to fill in the review form.  
Review Form
- Please upload the review of the proposal here.  
Uploaded file

- Select a recommendation and submit the review to complete the process. You must upload your review file before selecting a recommendation.  
Recommendation

Finally, the fourth section “Review Steps” of the review subpage allows you to review the proposal.

By clicking on the “**Mail**” icon, you firstly need to confirm whether or not you will be able to review the proposal (Step 1). You will automatically be redirected to an email webpage for informing the secretary.

You can then begin the review (Step 2). Please upload the proposal files include in the second section of the review subpage and read the metadata of the proposal includes at in the “Summary” subpage.

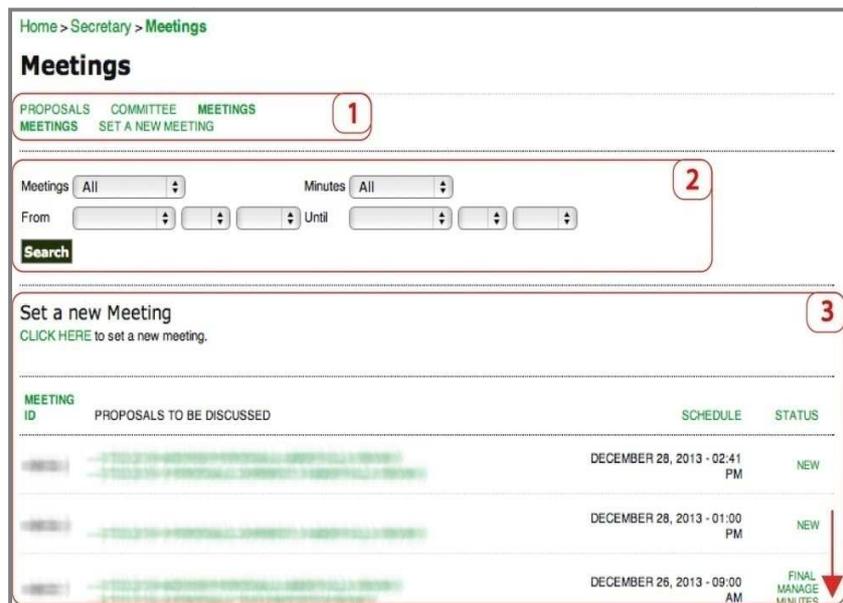
The committee who assigned to review might request you to fill a review form. In this case please click on the “speech bubble” icon and fill the form (Step 3.).

You can also choose to upload a file containing your review in the step 4. Please find your file with the “choose file” windows and upload it by clicking on the “**Upload**” button. Only one (1) file can be uploaded. If you want to replace it, choose another file and click on the “Upload” button. This will automatically replace the file.

If you added some comments (Step 3) or uploaded your review file (Step 4), you can finish your review by selecting a recommendation and clicking on the “**Submit Review**” button (Step 5). Your review is then finished.

## II.4 YOUR MEETINGS

You can access all your meetings by using, among other ways, the **“Meetings”** link on you “User Home” webpage.



Home > Secretary > Meetings

### Meetings

PROPOSALS COMMITTEE MEETINGS  
MEETINGS SET A NEW MEETING

Meetings: All Minutes: All  
From: [ ] [ ] [ ] Until: [ ] [ ] [ ]  
Search

Set a new Meeting  
CLICK HERE to set a new meeting.

MEETING ID	PROPOSALS TO BE DISCUSSED	SCHEDULE	STATUS
[ ]	[ ]	DECEMBER 28, 2013 - 02:41 PM	NEW
[ ]	[ ]	DECEMBER 28, 2013 - 01:00 PM	NEW
[ ]	[ ]	DECEMBER 26, 2013 - 09:00 AM	FINAL MANAGE MINUTES

The main “Meetings” webpage directly lists you all the meetings you have been invited. By default they are ordered from the youngest to the oldest. If you click on the title of a proposal to be discussed or your reply status concerning a specific meeting, you will access to the meeting webpage. On the top of this page is the **“Proposals”** link (*please refer to above screenshot*). This link will bring you to the list of all the proposals currently subject to a meeting.

Home > Committee Member > Meeting > List of meetings > View Meeting

### View Meeting

REVIEW ASSIGNMENTS    MEETINGS  
LIST OF MEETINGS    PROPOSALS FROM MEETINGS

---

#### Details

Meeting ID                    NERC.9  
 Ethics Review Committee   National Ethics Review Committee  
 Schedule                      December 28, 2013 - 02:41 PM  
 Length of the meeting      180 mn  
 Location                      рпуггджутдхтд  
 Schedule Status              Final

---

#### Proposals to be Discussed

PROPOSAL ID	INVESTIGATOR(S)	TITLE	REVIEW ROUND	STATUS
2013.2.NW	secretary2 secretary2, second...	<a href="#">TITLE OF ANOTHER PROPOSAL UNDER FULL REVIEW</a>	Initial Review - 1	Full Review
2013.5.NW	admin admin	<a href="#">TITLE OF A PROPOSAL CURRENTLY UNDER FULL REVIEW</a>	Initial Review - 1	Full Review

1 Proposal(s)

---

#### Reply

Are you going to attend?                    No

Remarks                                        qwb oqwb oqwb qplwdqpwidu qpwidubqw odbqow udbq owudbqowudb qwi dunqw pdkn] qpwidnqpw dlub?

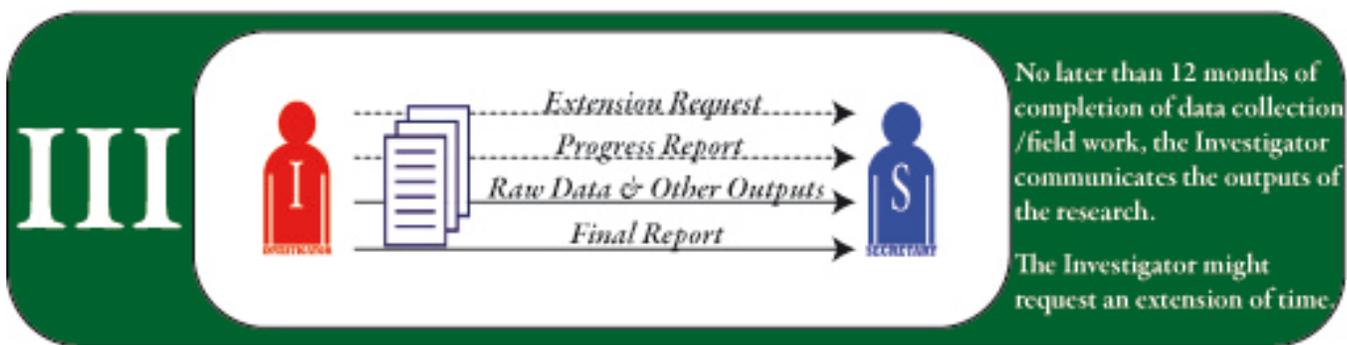
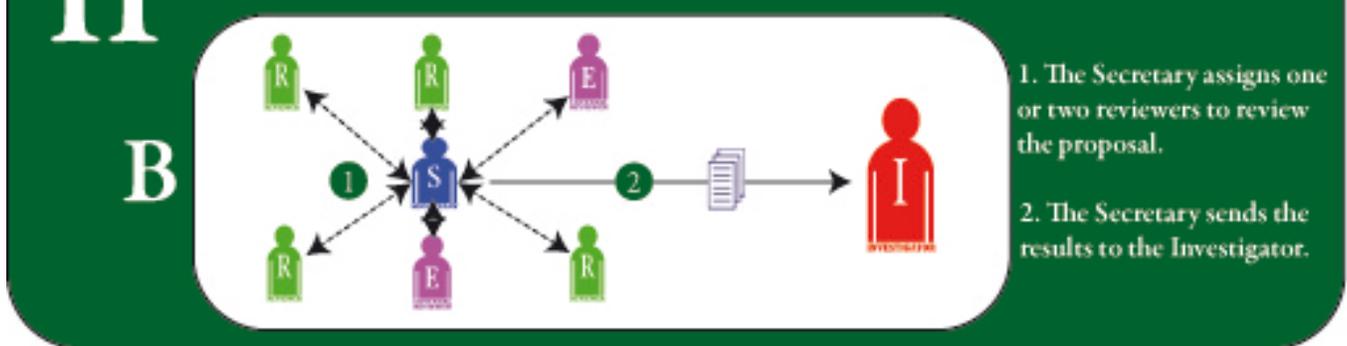
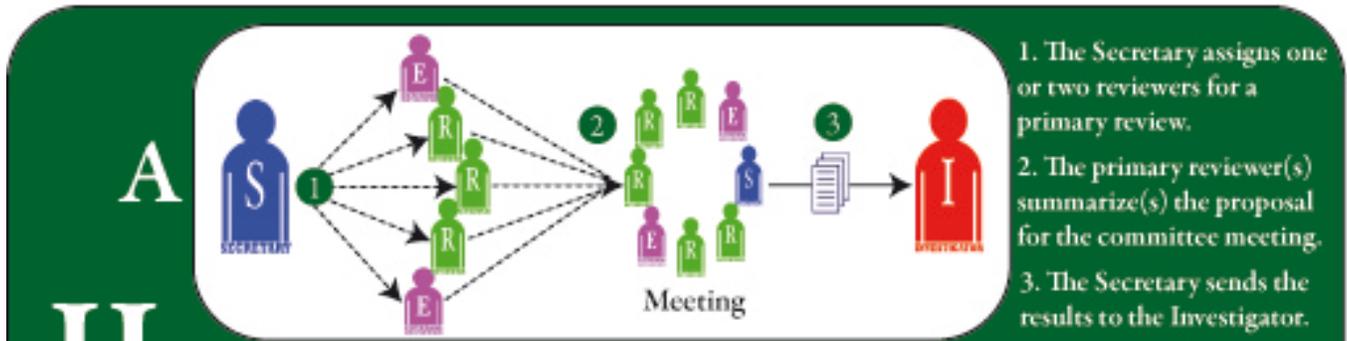
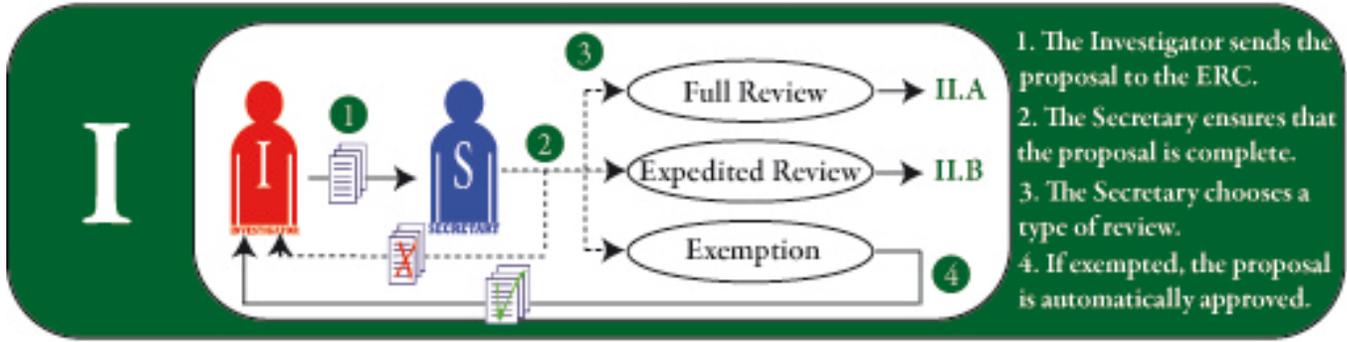
[EDIT ANSWER](#)

Once you access a meeting, the first section gives you the main information about this meeting, like the date or its location. The second section is listing you all the proposals subject to this meeting. Please click on the title of a proposal to access its information. If you are an assigned reviewer to this specific proposal, you will be redirected to the review page of this proposal. If not, you will be redirected to the summary page of this proposal. The last section of this page allows you to enter your reply status. Please click on **“Edit answer”** and enter your reply concerning this proposal. This will help the secretary of your committee to manage the meeting.

### III GLOSSARY

Account	Having an account within a website means you are registered into. The website has information about you and is able to identify you if you provide your username and password.
Arborescence	A website is build like a document with chapters and subchapters. It therefore possesses a hierarchical structure: an arborescence.
Chat room	A specific page on a website where users can communicate.
csv	A comma-separated values (CSV) file stores tabular data (numbers and text) in plain-text form. The CSV file format is very simple and supported by almost all spreadsheets and database management systems.
Download	To transfer data from a server or host computer to one's own computer or digital device.
Exportation	To format data in such a way that it can be used by another application. An application that can export data can create a file in a format that another application understands, enabling the two programs to share the same data.
Icon	A picture on a screen that represents a specific file, directory, window, option or program.
Link	In this case, an element that connects one part of the website to another, typically activated by clicking on a highlighted word at a particular location on the screen.
Log In	The process of identifying oneself to a website, usually by entering one's username and password.
Log Out	The process of ending the identification of oneself by a website.
Metadata	Data about the containers of data.
Mouse Over	In this case, information appearing when the user moves or "hovers" the pointer of the mouse over a particular area of the website.
Notifications	Formal announcements send to a particular user or group of users.
Portal	A website that brings information from diverse sources in a unified way.
Submission	A submission of a research proposal.
Tab	On a website, a button redirecting to one of the main webpage. A tab is present in every pages of the website and always at the same place on the screen. Usually a group of tabs are placed in the border of the window.
Upload	To transfer data from one's own computer or digital device to a server or host computer.
Username	A unique sequence of characters used to identify a user on a computer system.

# The Health Research Portals Operating Diagram



- I. Submission
- II. Ethics Review
  - A. Full review
  - B. Expedited Review
- III. Research Outputs

