Quick Reference Card

Completing Tasks as a Leader

Overview

This quick reference card (QRC) for Collaboration **Leaders** summarizes the tasks you complete in the Collaboration Workspace and elsewhere in MasterControl.

What is the Collaboration Workspace?

In the Collaboration Workspace, you and other members of a team collaborate together on a document. This means you can complete a number of tasks typically completed by **Collaborators**. See the *MasterControl: Completing Tasks as a Collaborator* QRC for details on how to:

- Enable **My Files**.
- Redline (edit) a document.
- Add comments.

The remainder of this QRC details tasks that can be completed by a Collaboration **Leader**.

Changing Collaboration Members (Modify a Step)

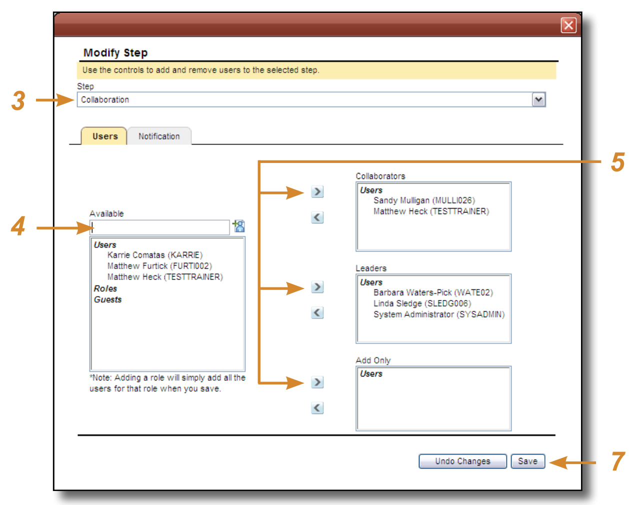
As a Leader, you can add or remove MasterControl users in a step in a route.

▶ Adding a New User

You have the option of adding by individual users or by role. If you have a group of people to enter, then adding them by role takes less time. But, be aware that this option adds *all* the users in that role.

1 In MasterControl, go to one of the following locations:
   - In **My Tasks** or **Tracking**, find the route you want to modify.
   - In **Task Collaboration**, go to the **Members** section at the bottom.

2 Click the **Modify Step** icon ( ).
   The Modify Step window appears.



3 In the **Step** drop-down list, ensure the correct step in the route appears.

4 In the **Available** field, select a user or role.
   Tip: To select more than one, hold down **Ctrl** as you click multiple choices.
   a In the **Quickfind** box, enter the person's first name, last name, or a portion of either.
      The contents in the scrollable box changes as you enter characters.
   b In the scrollable box, click the name of the person/role you want.

5 Click the add arrow ( ) to the left of **Collaborators**, **Leaders**, or **Add Only**, as necessary.
   The person or role appears in the appropriate box.
   Note: A person can appear in only one box.

6 Return to steps *4* and *5* to add other users/roles as necessary.
   Note: to return the screen back to the way it was when you first viewed it, click Undo Changes.

7 Click Save.
   A green wink appears, confirming you successfully modified this step. Also, MasterControl replaces each role name with the names of individual users in each role.

8 To close the window, click .

Note: Providing *Guest* connections are not supported at this time.

▶ Removing a User from a Step

1 In **My Tasks** or **Tracking**, find the route you want to modify.

2 Click the route's **Modify Step** icon ( ).
   The Modify Step window appears.

3 In the **Step** drop-down list, ensure the correct step in the route appears.

4 In the **Collaborators**, **Leaders**, or **Add Only** box, click a person you want to remove.
   Tip: To select more than one, hold down **Ctrl** as you click multiple choices.

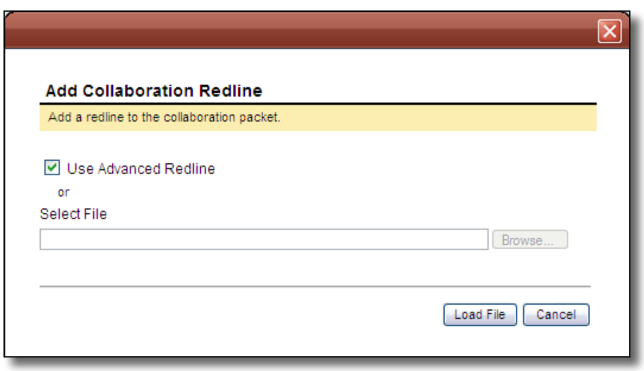
5 To the left of the box, click the remove arrow ( ).
   The person's name disappears.

6 Return to steps *4* and *5* to remove other users as necessary.

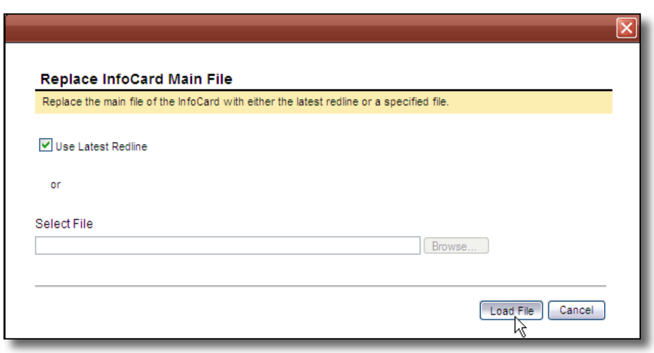
7 Click Save.
   A green wink appears, confirming you successfully modified this step.

Signing Off on a Collaboration

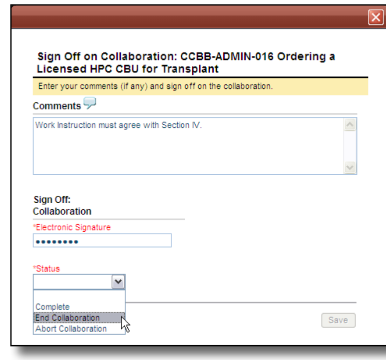
1. Open the collaboration in the **Task Collaboration** page.
2. Under **Collaboration Actions**, click the **Edit File** icon.
   A File Download confirmation message appears.
3. Click **Open**.
   The file opens in its native application.
4. If a yellow banner appears across the top of the page, informing you that the application has the file in a protected view, click Enable Editing.
5. Edit the file one last time, accepting or rejecting changes, as necessary, to produce a clean document without edit marks or comments.
6. Save your changes, and then close the document.
   Important! Do a *Save*; not a *Save As*.
7. In MasterControl, **Task Collaboration** page, click the **Upload Changes** icon ( ).
   The Add Collaboration Redline window appears.



8. Click **Load File**.
9. On the **Task Collaboration** page, under **Actions**, click the document's **Replace File** icon ( ).
   The Replace InfoCard Main File window appears.



10. Click **Load File**.
11. In the gray taskbar, click the **Sign Off** button ( ).
    The Sign Off window appears.
12. (*optional*) Enter **Comments** about your sign off.
13. Enter your **Electronic Signature** password



14. Click the **Status** drop-down arrow to select one of the following:
    - **Complete**. Signs off this particular redline in the revision cycle. If the step has *Resend Task After Each Redline* selected, you receive notification each time a new redline has been uploaded.
    - **End Collaboration**. This ends revision cycles completely and moves the collaboration to the next step.
    - **Abort Collaboration**. Stops revision cycles *without* progressing to the next step in the route.
15. Click **Save**.

Editing the Collaboration Title or Instructions

If, for any reason, you need to change the title of a Collaboration InfoCard or the instructions a Collaborator sees on the **Task Collaboration** screen, complete the following.

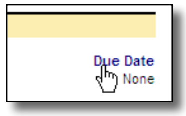
1. Open the collaboration in the **Task Collaboration** page.
2. Near the top of the page, click the **Edit** icon ( ) to the right of the task title.
   The Edit Task Details window appears.
3. To change the task title, edit the **Task Name** field.
4. To change the instructions, edit the **Task Instructions** text entry box.
5. Click **Save**.
   The Task Collaboration page reappears with your changes.

Setting a Due Date

At any time, you can set a due date for users to sign off on the collaboration task (it appears in their **My Tasks** page). When the task becomes overdue, the date becomes red.

Note: If the collaboration is part of a **project**, you cannot set or change this date.

1. Open the collaboration in the **Task Collaboration** page.
2. Under the thin yellow banner, at the far right, click the **Due Date** link.

   A calendar window appears.
3. Use the arrow to progress to the month you want and click a particular day.

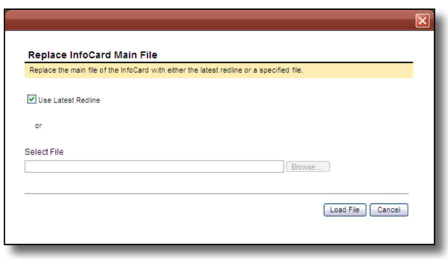
   The date appears on the **Task Collaboration** page.

Replacing the Main File

As Leader you have the ability to replace the most current document in the InfoCard with a different version you have on your hard drive or server.

1. Open the collaboration in the **Task Collaboration** page.
2. Under the **Actions** column, click the **Replace** icon ( ).

   The **Replace InfoCard Main File** window appears.

3. To use the latest redline as the main file, select the **Use Latest Redline** checkbox.
4. To use a file you have:
   a. Clear the checkbox.
   b. Click **Browse**.

      The Choose File system window appears.
   c. Find and highlight the file, and then click **Open**.

      The path to your file appears in the **Select File** field.
5. Click **Load File**.

Getting Help

If you experience any technical problems working with MasterControl that you are unable to resolve, email the Duke Clinical Research Institute (DCRI) Service Desk at dcriservicedesk@dm.duke.edu. For time-sensitive issues, call them Monday–Friday (except DCRI holidays), 6 a.m. to midnight, at 919.668.8916.