

Guideline number	Guideline 59.013A	Version	1.0
Title	Creation Of A New (Extract) Project		

On receipt of application open the Safe Haven Projects Register database - Open the Forms Section of the database and update the following:

All mandatory fields are highlighted on the forms in bold text – make sure they are all filled in or future queries will make no sense.

Create A Project 01 – Create Basic Record:

- Allocate project number based on year, activity area and sequential number for that area. Use SOP 59.013 Administration of Research Projects to help you allocate a number, if you need to.
- Mandatory field titles are in bold text. Fill in as much of the form as possible, based on the information provided in the application.
- Allocate a clock pathway
- Set status as proposed
- Set as part of master record

Additional

If, when entering the information into form Create A Project 01 – Create Basic Record, you find that an investigator, funder or sponsor does not exist in the dropdown list; add them to the appropriate table ('Investigators', 'Funders' or 'Sponsors') as a new record. Then re-open the form to enter the data for the project.

Create A Project 02 – Enter Application Details

- Enter date full application received/accepted
- Allocate approval route
- Tick all appropriate needed approval boxes
- Fill in as much of the form as possible. If assessments have already been carried out on the application, enter the information about the assessments.
- Set as part of master record

Create A Project 03 – Enter Datasets Required

- Enter each dataset requested on the project application, including any new ones the safe haven does not yet hold.
- Set as part of master record

Create A Project 04 – Enter Account Details

- Enter the financial details included on the application form
- If you find details are missing, contact the PI for the information
- Set as part of master record

Create A Project 05 – Enter Quote Given

- Enter the details of the quote given for the project, if not already entered
- Set as part of master record

Create A Project 06 – Set Clocks

- Set the clock status to 'Clock Not Started'

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- Enter the date in the 'Status Start' field

Create A Project 07 – Create Data Spec Index Record

- Enter index number
- Set as part of master record

Create A Project 08 – Create Data Spec Version Record

- Enter data spec version number (usually 1.0 for the first one) – checking that the correct index number is displayed
- Set as part of master record

Create A Project 09 – Create Extract Record

- On creating a new record for the project an Extract Record ID will automatically be generated.
- Set as part of master record

Create A Project 10 – Create Extract Validation Record

- On creating a new record for this project a Validation ID will automatically be generated.
- Set as part of master record

Create A Project 11 – Create Waiting List Record

- Enter Waiting List Priority as 'Pending'
- Enter Extract Status as 'Pending'
- Set as part of master record

Create A Project 12 – Create Data Release Record

- On creating a new record for this project a Data Release ID will automatically be generated.
- Set as part of master record

Create A Project 13 – Create Amendment Record

- On creating a new record for this project an Amendment Record ID will automatically be generated
- Set Amendment Type as 'None – Original Application'
- Set as part of master record

Create A Project 14 – Create Access Form Record (only if project is going across RCB portal)

- Enter Outcome Type as 'Access Form'
- Enter Software Packages requested on application form. If none have been requested, check with PI if any are needed.
- Set as part of master record

Create a Project 15 – Other Safe Haven Involvement (only if other Safe Havens are involved)

- Tick the 'Multi-Safe Haven Project' box
- Enter relevant Project ID for each Safe Haven involved (if available)

If not already done:

Conduct Application Assessment:

- Fill in forms Form 59.011A Application Assessment Form (SH) and Form 59.013D Project Application Validation Checklist.

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Send letter to Principal Investigator:

- Fill in template Form 59.013C Safe Haven Application Acknowledgement

To create the Project 'Master' Record the following fields need to be completed by using the above forms:

Record ID/Project Number – manually created

Assessment ID – auto-generated on creating Application record

Amendment ID – auto-generated on creating Amendment record

ClockRef ID – auto-generated on creating Clocks record

Data Need ID – auto-generated on creating Data Needs record

Financial ID – auto-generated on creating Finance record

Extract ID – auto-generated on creating Extract record

Validation ID – auto-generated on creating Validation record

Waiting List ID – auto-generated on creating Waiting List record

Release ID – auto-generated on creating Data Release record

Additional if being sent across the portal:

Access Form ID – auto-generated on creating Access Form record

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Guideline signatories

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Document history

Version	Date	Description
1.0		First Release

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