UCB eRequest

IIS Requestor - Quick Reference Guide

Inspired by patients.
Driven by science.

CONTENTS

1 INTRODUCTION

The purpose of this guide is to provide guidance to external requestors applying online for UCB support of externally sponsored scientific research through the eRequest system.

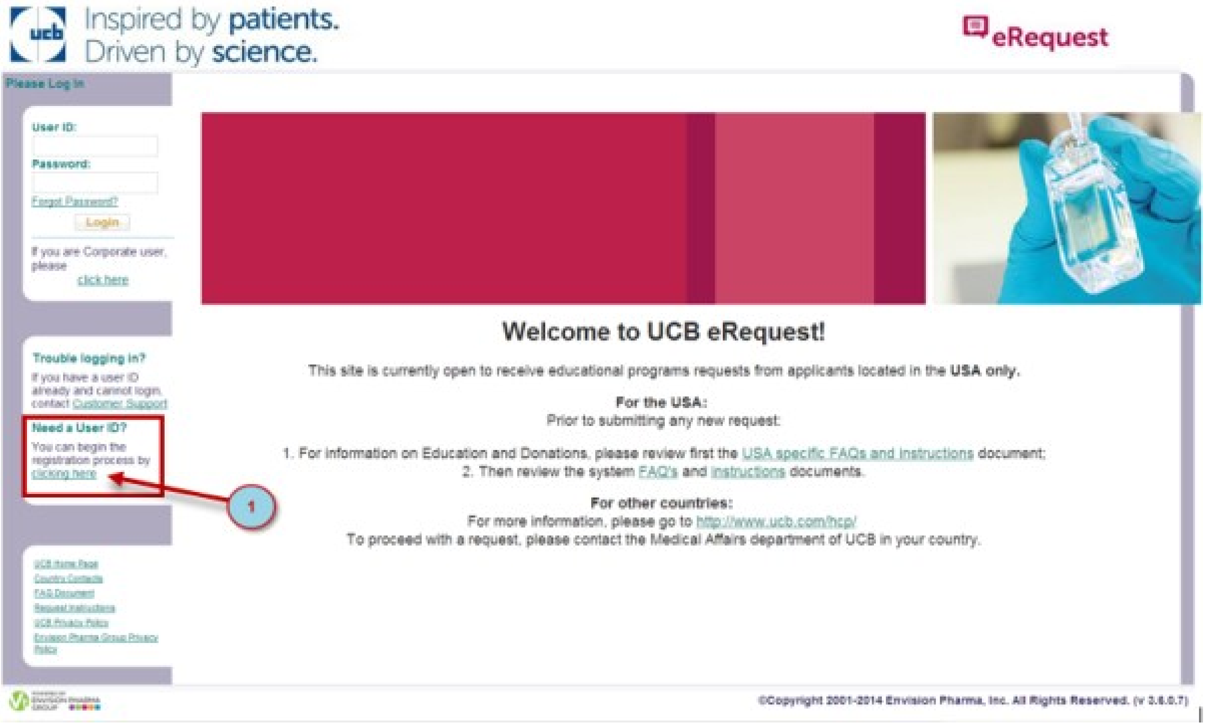
2 HOW TO REGISTER AND LOG-IN

To register and receive a User ID and password for the eRequest system, begin by accessing the appropriate web link:

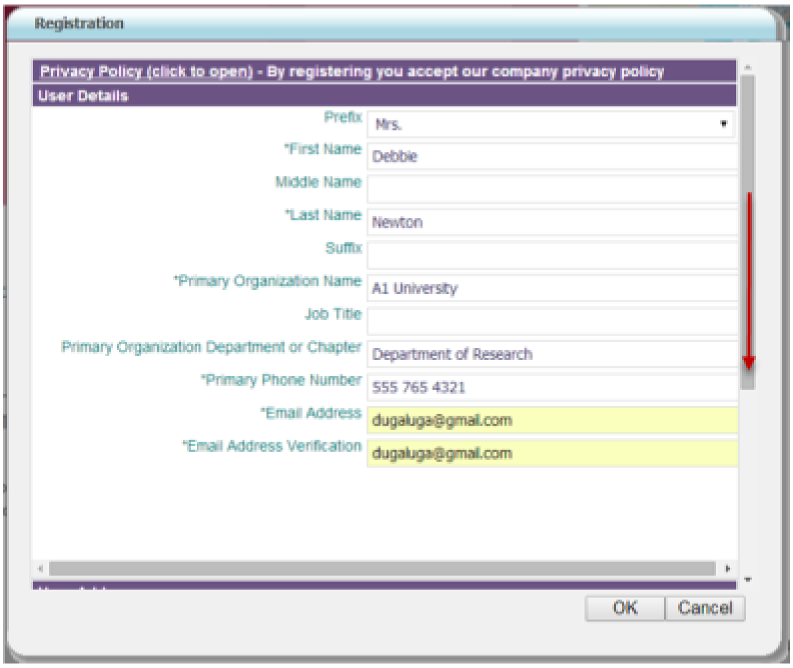
HTTP://EREQUEST.UCB.COM/

2.1 REGISTER TO RECEIVE AN EXTERNAL REQUESTOR USER ID AND PASSWORD

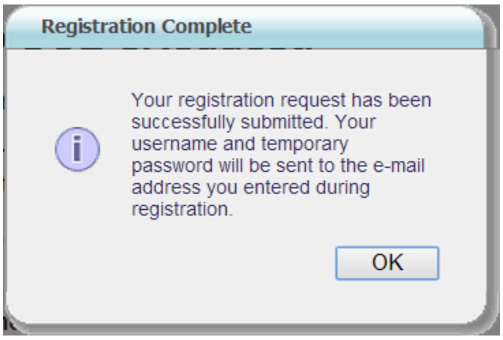
1. Click the ***Need a User ID*** link.



2. Complete the Registration form. Required fields are marked with an * [asterisk].



3. Scroll down through the form to enter information into all of the required fields.
4. Click ***OK*** when complete.
5. Watch for the confirmation box shown below, which indicates a successful registration.



2.2 LOGIN WITH USER ID AND PASSWORD

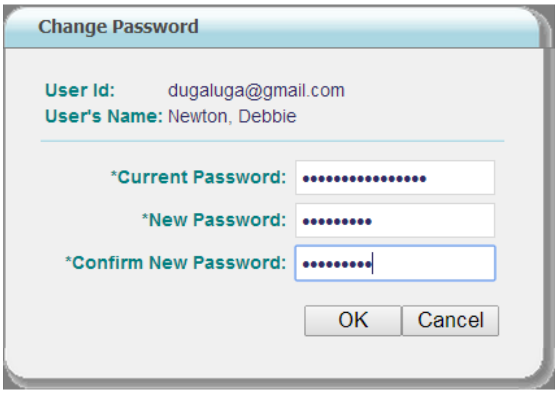
An email with your User ID will be sent to the email address provided during registration. If the message is not received in 20 minutes, search your Junk E-mail folder, in case it was classified as junk mail.

A second email will be sent containing a temporary password.

1. Log in to the eRequest website using the new User ID and the temporary password.

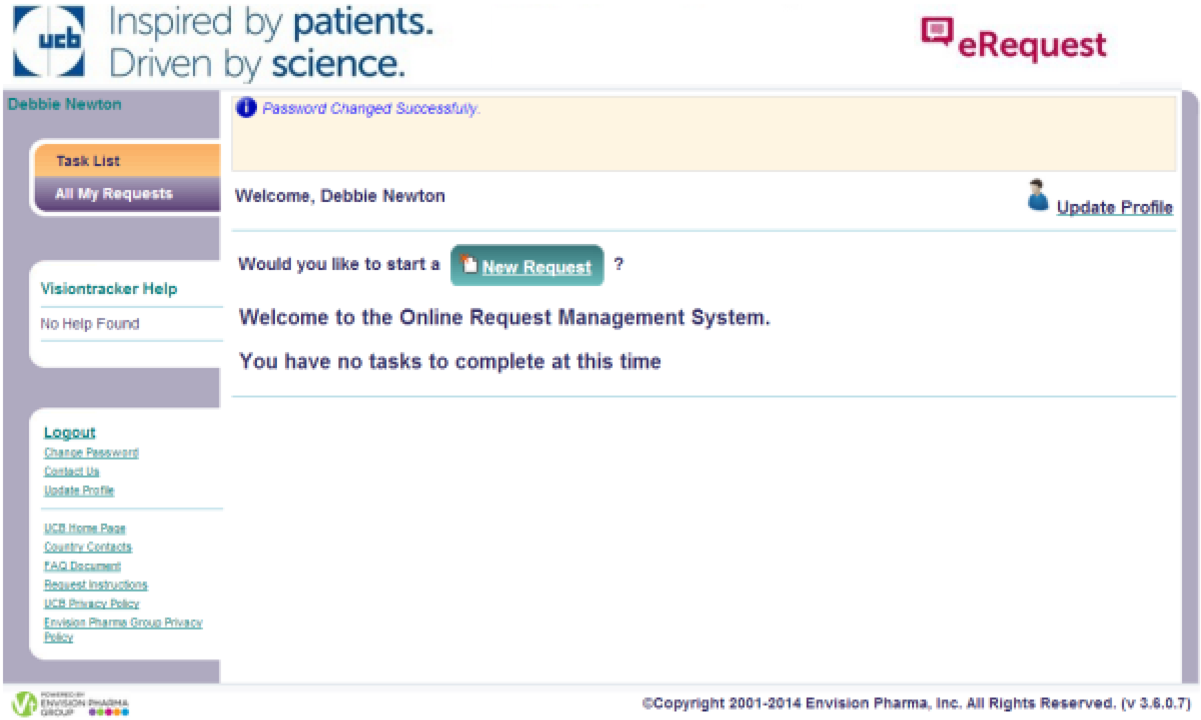
Note: *Notice the* ***Forgot Password*** *link; if you require a new password, click this link and follow the on-screen instructions.*

2. The temporary password is designed to work only **once**. You must create a new password prior to logging in again. Follow the on-screen instructions.



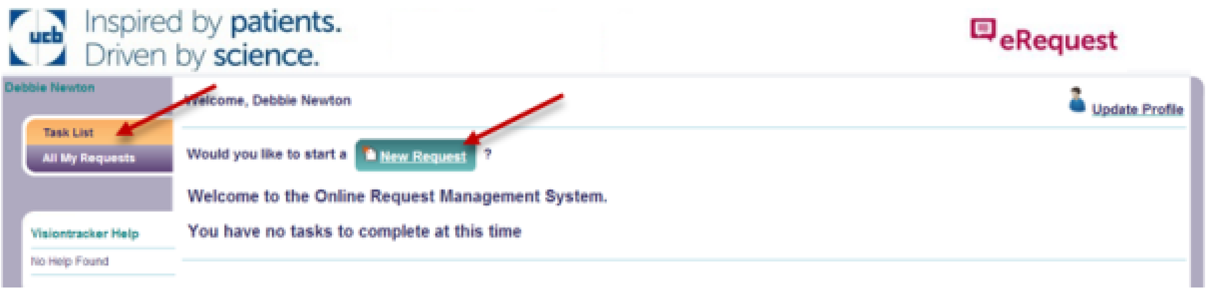
Tip: *If a password does not meet the security requirements, the system will provide messages to guide you.*

3. The following screen will appear after you have successfully created a new password.

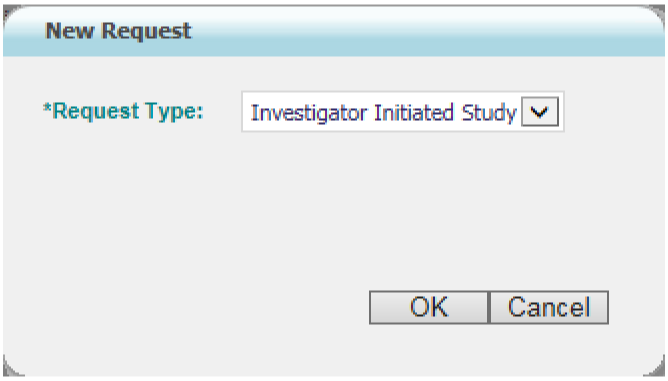


3 HOW TO SUBMIT AN APPLICATION

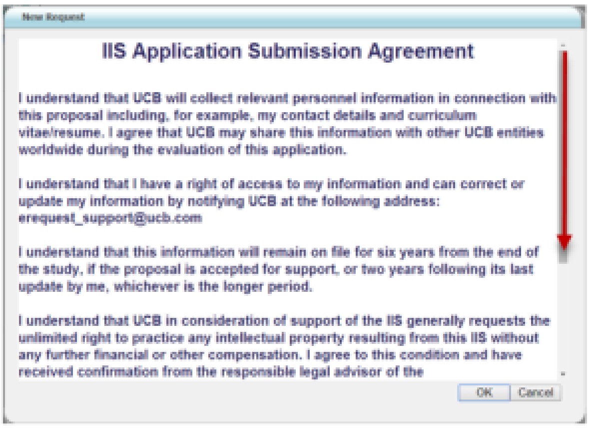
1. ***Log in*** to the eRequest system.
2. From the Task List tab click on ***New Request.***

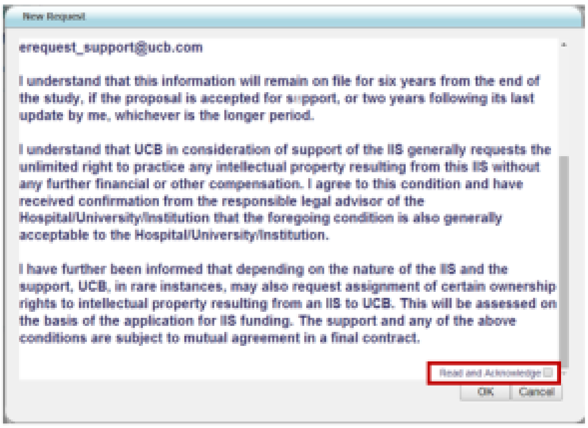


3. Select your ***Request Type*** from the drop down box and click ***OK*** (this should be Investigator Initiated Study).



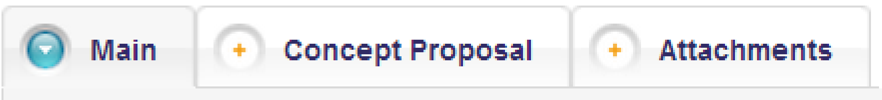
4. Review the IIS Application Submission Agreement. To confirm and agree, scroll to the bottom of the text, click the ***Read and Acknowledge*** box and click ***OK***.





3.1 MAIN NAVIGATION TABS

The main navigation tabs display at the top of the screen of the new application.



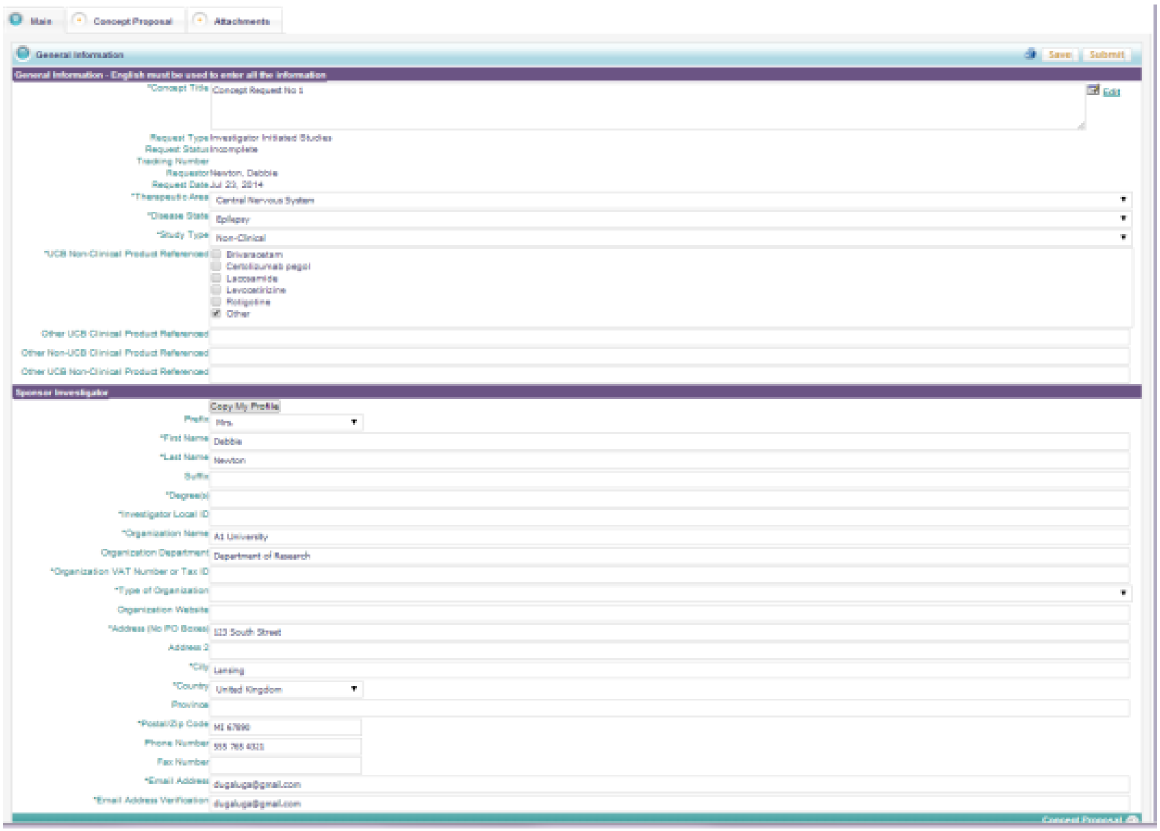
To begin, fill in the required information on the Main tab. All required fields are marked with an * [asterisk]. Fill in the relevant details of your concept; each tab contains required fields.

To switch from one tab to another, click on the intended tab. You may also click the ***Next Tab*** link at the bottom of the page to progress to the next tab in the series.

***Tip: For more guidance on the type of information to be added to each section in all tabs, click on the field label (i.e.: Concept Title) to show the tool tip.**

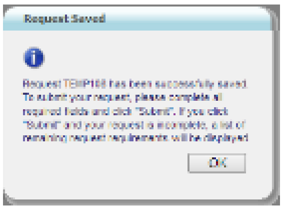
3.2 "MAIN" TAB

The ***Main*** request tab contains information pertaining to the top level of information of the Request and also the Requestor. A sample screen shot is shown below.
*Note: some selections will automatically add or remove fields accordingly, these additional fields are always *required*



3.3 SAVE STUDY APPLICATION

1. Enter all required information on the Main Tab , and then click the ***Save***  button.
   - A *Save* confirmation displays. It contains a temporary application number. This is the application's identification number prior to submission.



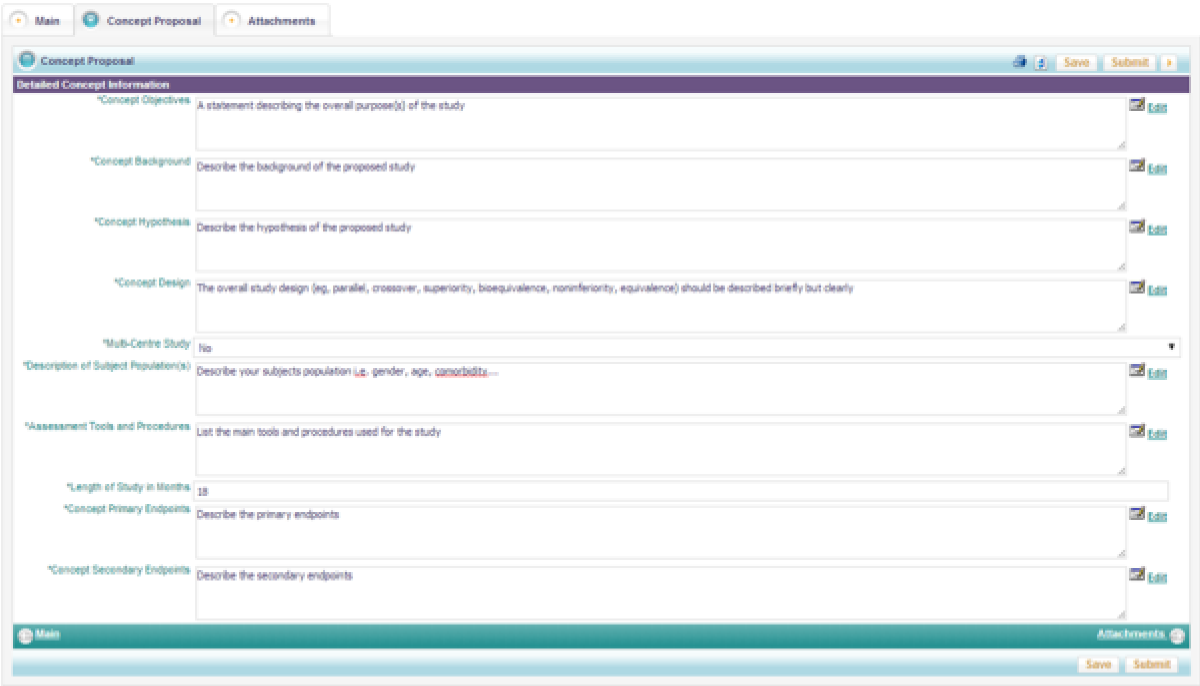
   - A new number will be assigned after the completed application has been submitted.

3.4 CONCEPT PROPOSAL TAB

The ***Concept Proposal*** tab should be populated with information relating to the IIS concept you wish for UCB to consider for support. Concept submissions include *Concept Objectives, Concept Background, and Length of Study in Months plus other important information.*

1. You can enter this information by typing directly into the box available or by clicking on the Edit button next to each section; this will open a separate window for you to populate

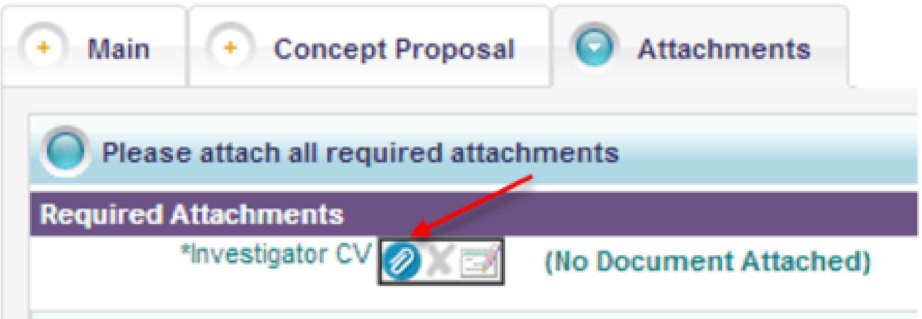
Note: You can paste information directly from another source into the text or pop up box to facilitate the population of this tab.



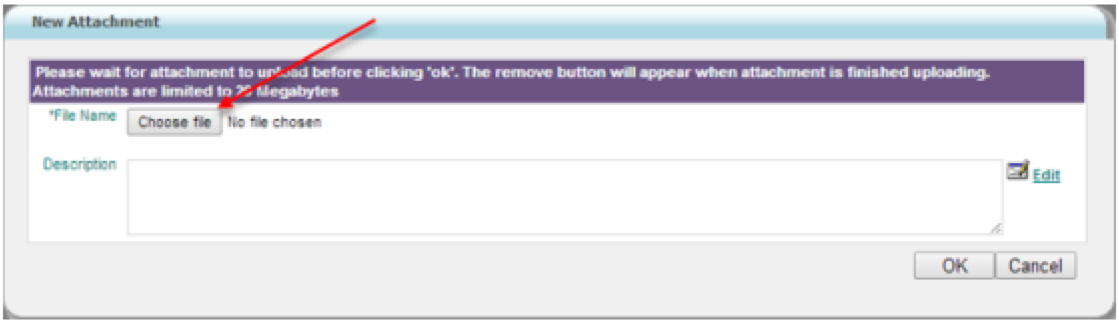
3.5 ATTACH THE REQUIRED CV

A required attachment on the **Attachments** tab is the Curriculum Vitale (CV) of the Investigator. To attach the CV, follow the steps below. Other attachments may be needed during the review process:

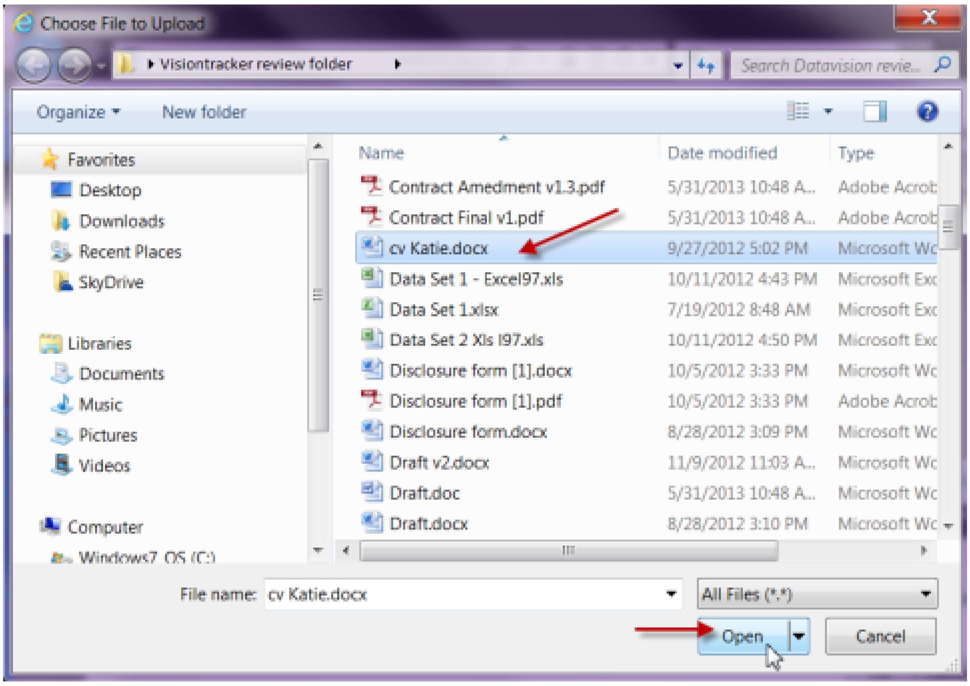
1. To begin, click on the ***paperclip*** icon next to the required CV label.



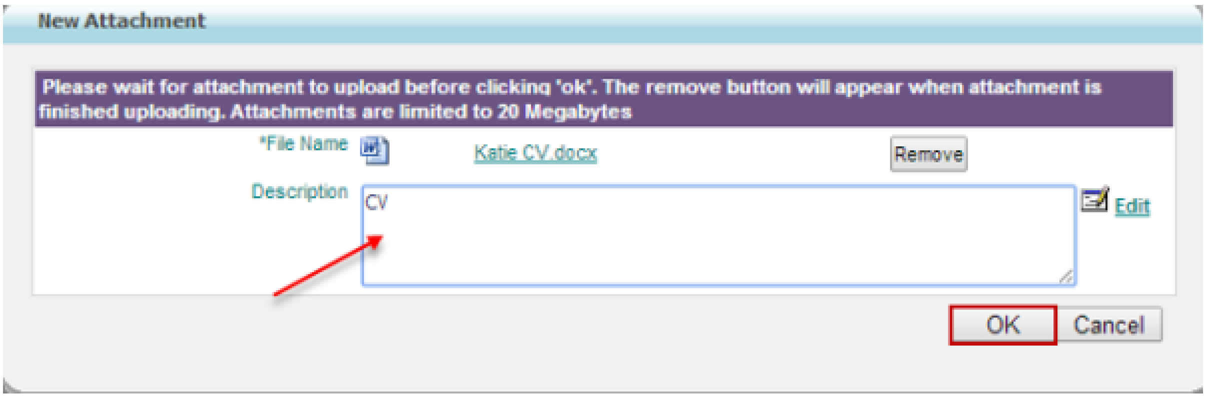
2. A pop-up window appears; click the ***Choose File*** button.



3. Navigate to the appropriate folder on your computer, highlight the file name, then click the ***Open*** button.

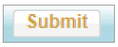


4. At the next screen, enter a description of the attachment (optional).

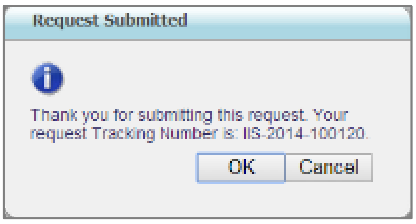


5. Wait for the orange prompt that reads *Uploading, please wait…* to disappear, which indicates that the attachment has successfully uploaded to the server.
6. Click ***OK***.

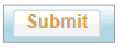
3.6 SUBMIT APPLICATION

1. Once you have completed all of the required and relevant information, click the ***Submit*** 

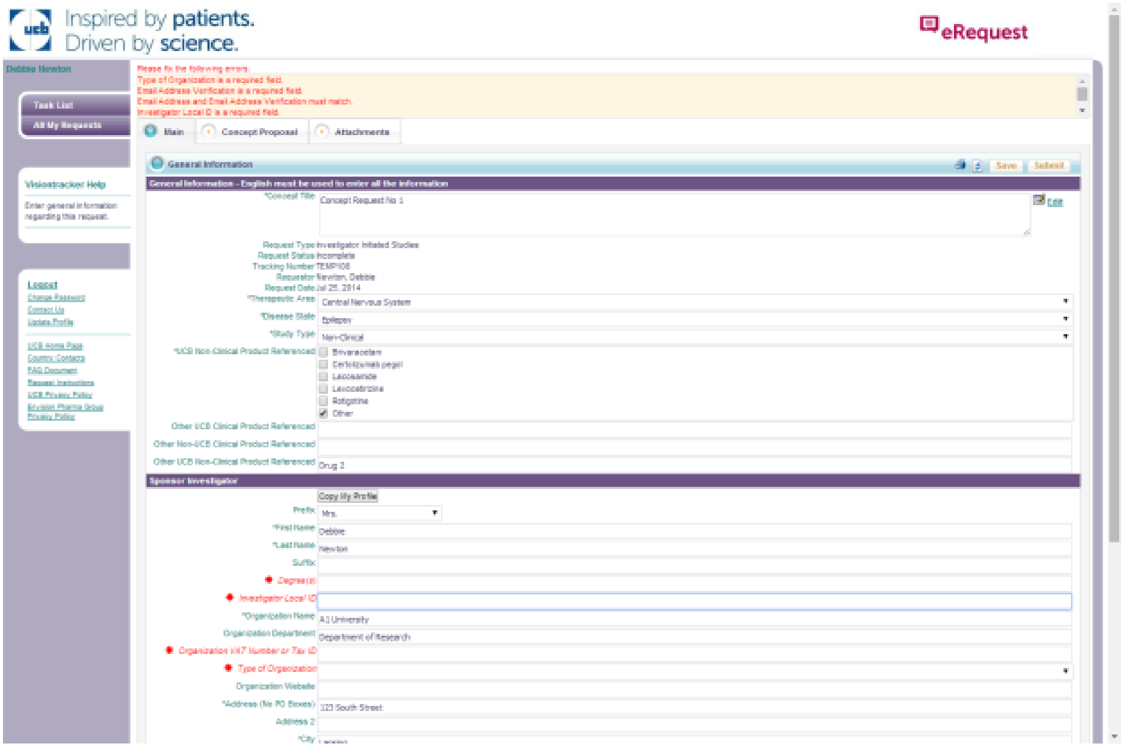
button at the top of the screen.
   - If the submission is successful, a new number is assigned to the completed application.



   - Please record this number for future inquires. An acknowledgement confirmation email will also be sent.
2. If the submission is not successful, red text appears indicating that required fields have not been completed yet. In order for the system to accept the application, the required fields must be completed.
   - Click on each tab and scroll through the application to locate the labels displayed in red (see below). Fill in the missing information.
3. You may need to cycle through this process one or more times until all of the required fields have been completed.
   - Click 

to hide the red text.
   - Click 

to identify additional missing required fields.

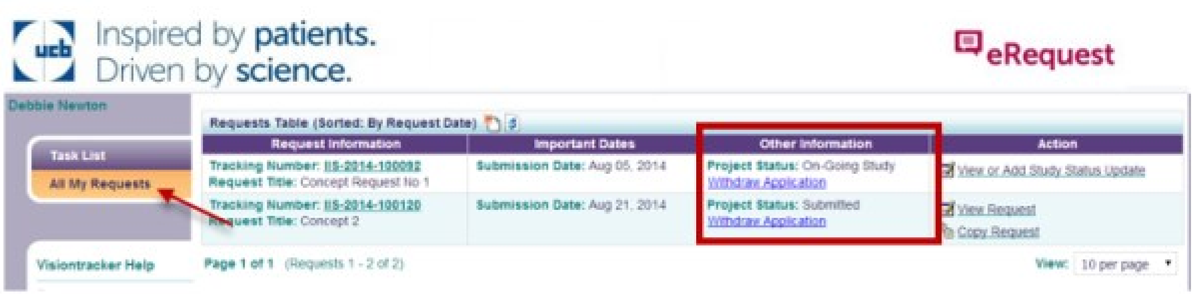


*Note: After completing all required fields and successfully submitting the application, the application **cannot** be edited until UCB requests additional information.*

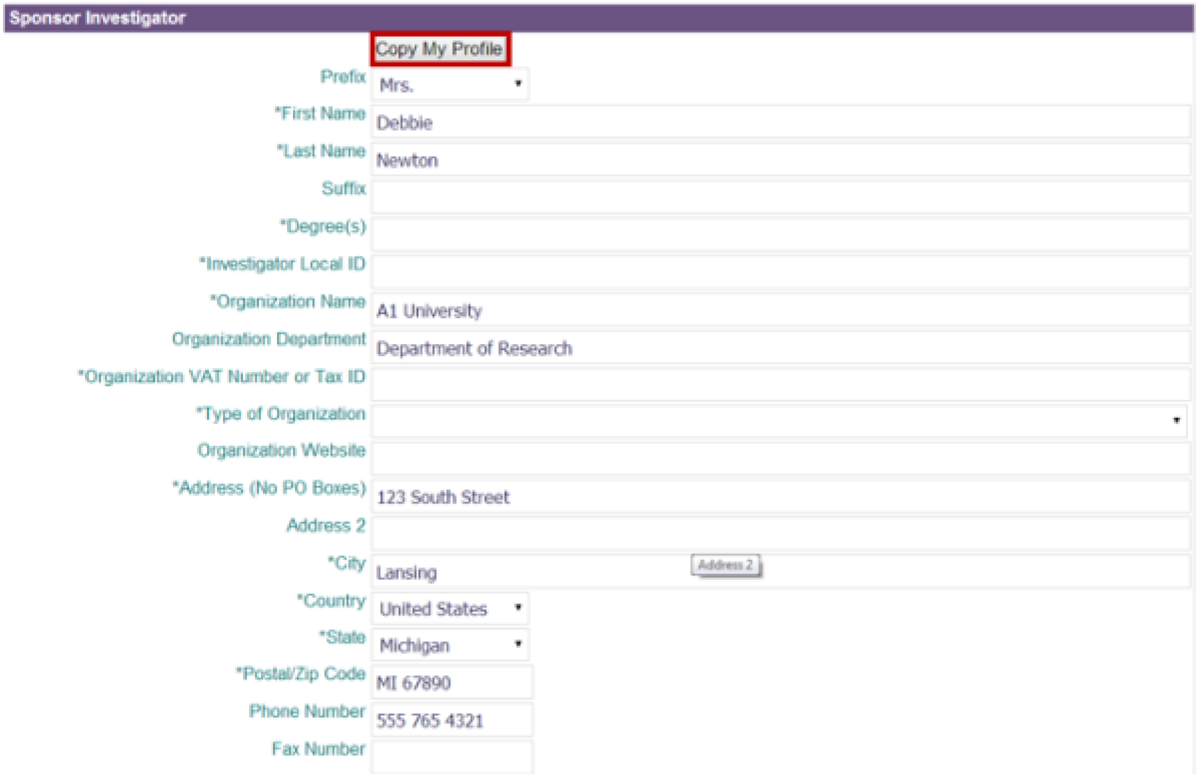
If you have forgotten to include information, contact UCB and follow the steps in FAQ no. 4.

3.7 HELPFUL HINTS AND TIPS

1. To locate previously completed applications click the **All My Requests** tab.
   - You can also check the status of your Request under the Other Information column



2. The ***Copy My Profile*** button is used to duplicate the information entered into the initial application. If this information matches, take advantage of the short cut.

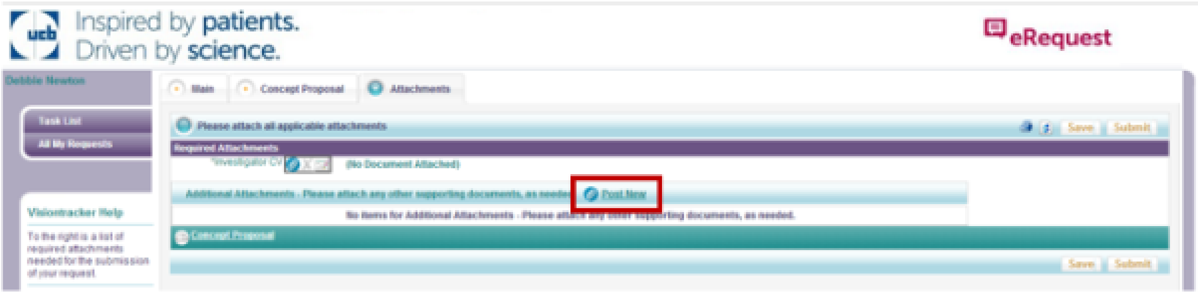


3.8 ADDITIONAL ATTACHMENTS

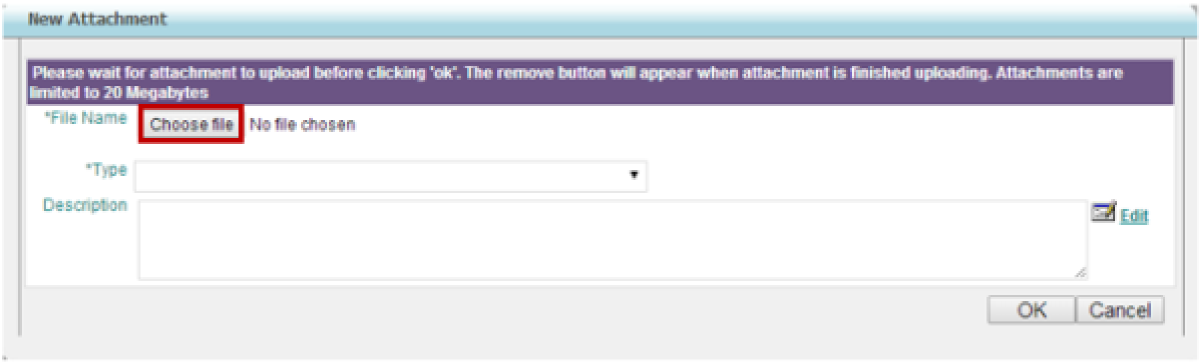
When completing a request, other types of attachments can be included via the **Attachments** tab; follow the steps below.

1. Click on the **Attachments** tab. 

2. Click the ***Post New*** link with the ***paperclip*** icon under the *Additional Attachments* section.

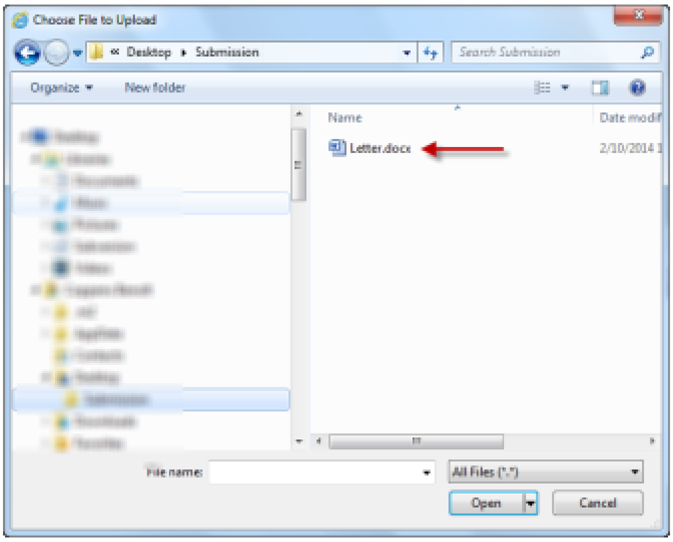


3. A pop-up window displays; click the ***Choose File*** button.

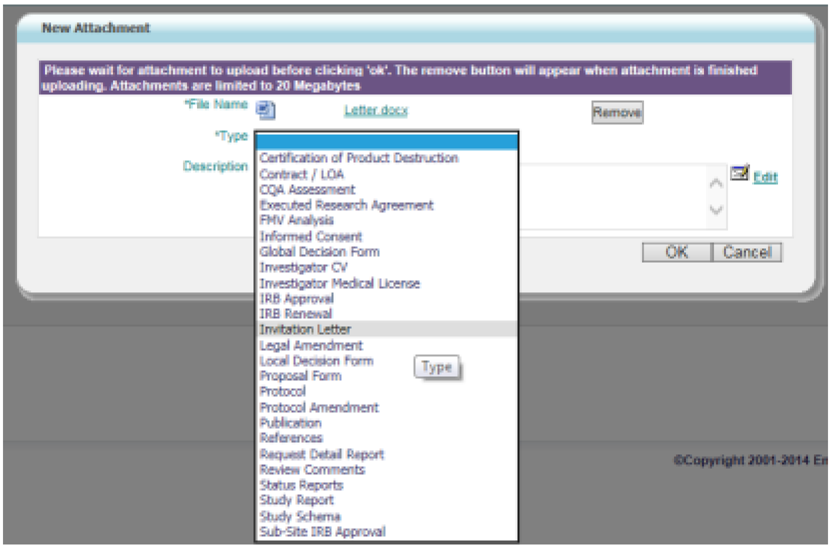


Note: *Attachments are limited to 20 megabytes.*

4. Navigate to the appropriate folder on your computer, highlight the file name, then click the ***Open*** button.



5. At the next screen, ***select the type of attachment*** from the drop-down menu. In this example, an Invitation Letter is being attached.

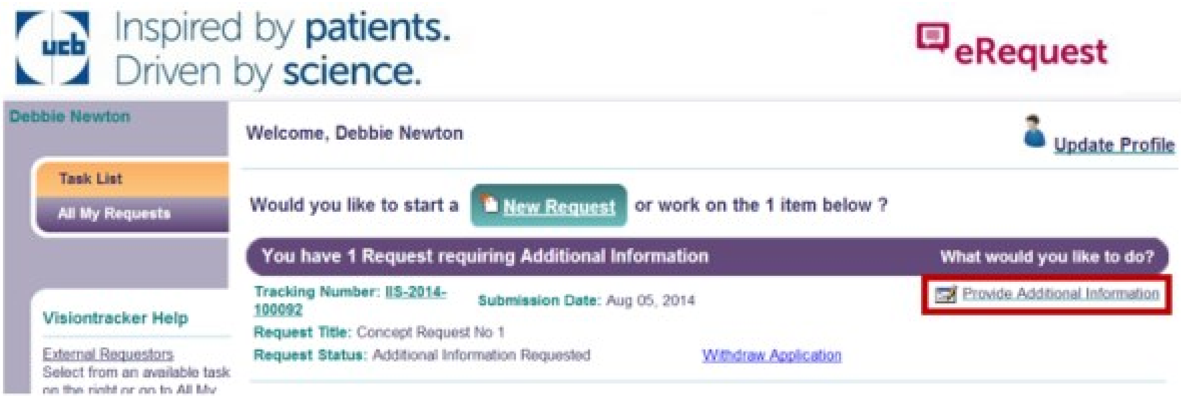


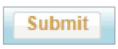
6. Enter a description of the attachment (optional).
7. Click ***OK***.

4 HOW TO PROVIDE ADDITIONAL STUDY INFORMATION

A user will be notified via email if additional information is required. The additional information requested will be contained in the email and the researcher/requestor will be instructed to log into the system to provide the information.

1. Click the link in the email message and ***log in*** to ***eRequest*** using your User ID and password**.**
2. From the **Task List** tab, locate the study requiring additional information.
3. Click the ***Provide Additional Info Requested*** link.
   - This link allows you to edit the application and provide the requested information.

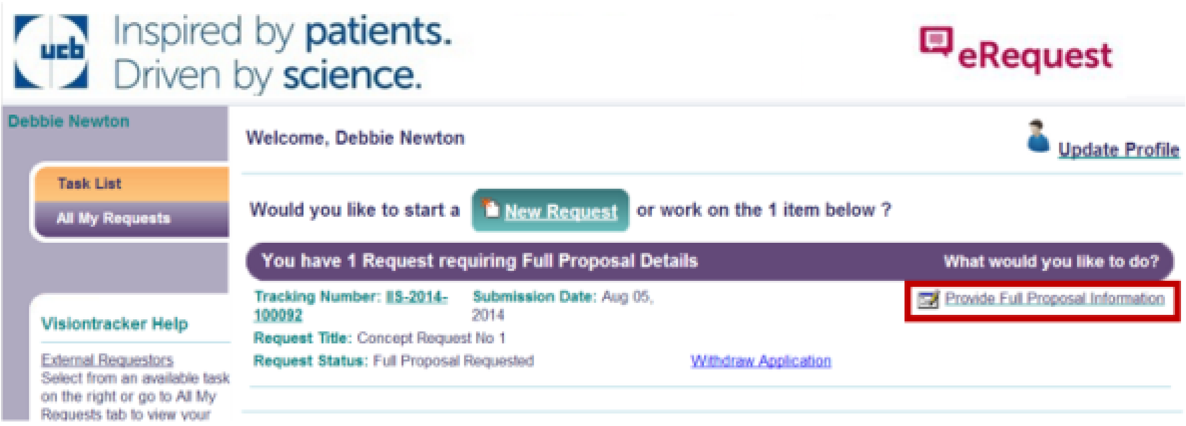


4. Add the information requested by UCB; click the ***Submit***  button when finished.
   - This study application disappears from your Task List after submitting it.

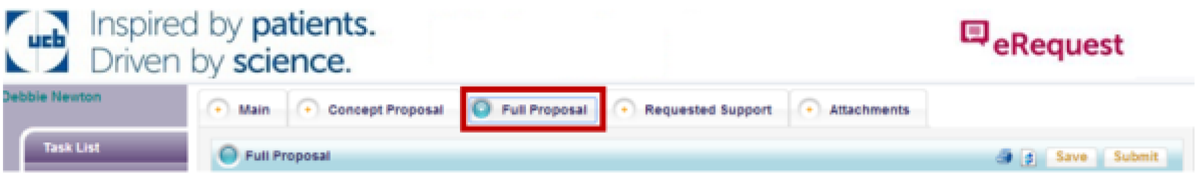
5 HOW TO PROVIDE FULL PROPOSAL INFORMATION

Upon recommendation of a Concept , the Requestor will receive an email expressing interest in the submission of a Full Proposal. Follow the steps below:

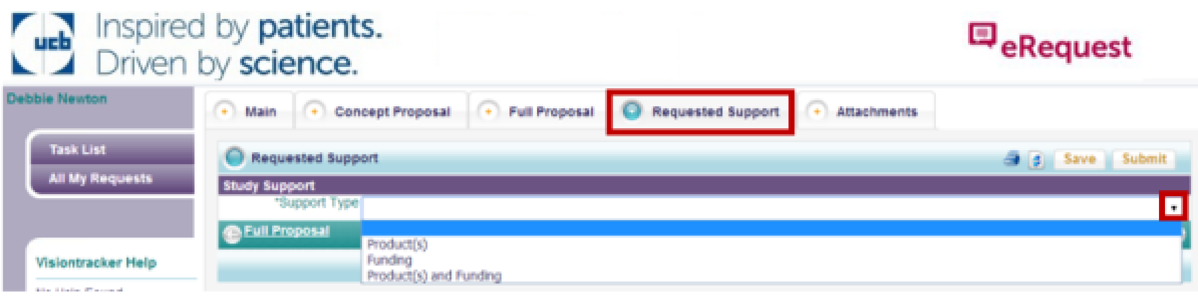
1. Click the link in the email message and ***log in*** to eRequest using your User ID and password.
2. From the **Task List** tab, locate the study requiring the Full Proposal Information.
3. Click the ***Provide Full Proposal Information*** link



4. Two new sub-tabs will now be visible called ***Full Proposal*** and ***Requested Support***, click on the ***Full Proposal*** sub-tab.

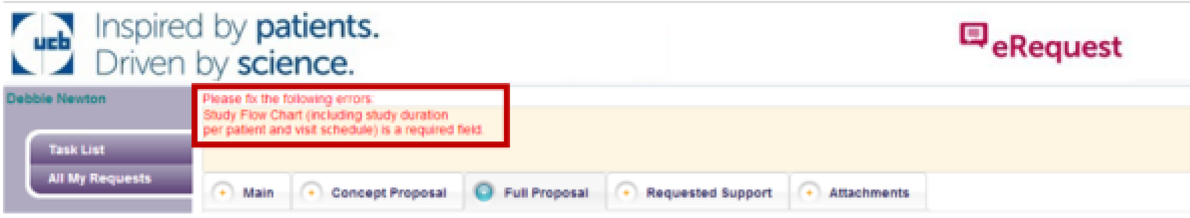


5. Complete all fields ensuring all fields denoted with a * are completed (these are the ***required*** fields)
   a. If you are unable to complete all required fields, click ***Save*** to ensure your data is saved for future completion.
6. Once all fields are completed on the ***Full Proposal*** sub-tab click on the ***Save*** button
7. Select the ***Requested Support*** sub-tab



8. Select your ***Support Type***
   a. Note: Some additional fields may become visible depending upon the selection made in the ***Support Type*** field

9. Complete the requested information. This will vary depending upon the ***Support Type*** selected
10. Check the ***Attachments*** sub-tab to ensure you have attached all the required documentation
11. Click ***Submit***
    a. Note: Any missing information will be indicated at the top of the screen. Complete this information and click ***Submit*** again

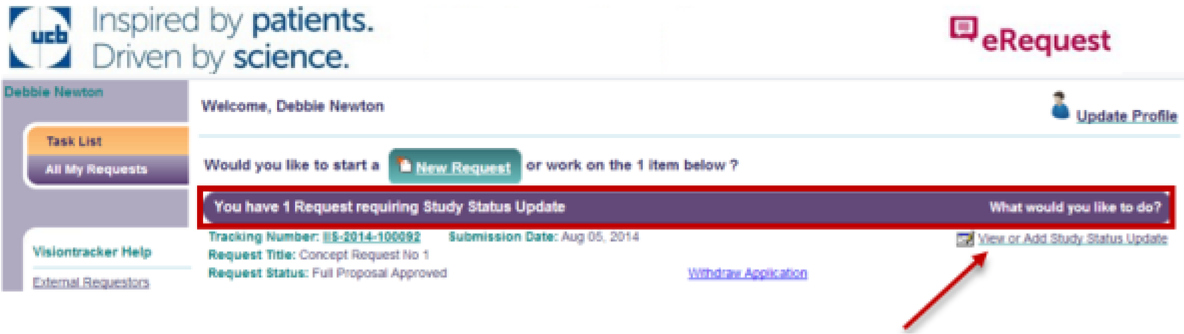


6 HOW TO SUBMIT STUDY STATUS UPDATES

Active studies require updates periodically. A requestor will be notified via email when a Study Status Update is required; however, information can be provided at any time while the study is active.

Note: The information provided below will instruct you to ***Submit*** your Request after each Study Status update. This is not necessary if you are updating more than one section at a time. Ensure you ***Save*** the Request after each update to ensure your change has been captured. Click ***Submit*** once you have completed your updates.

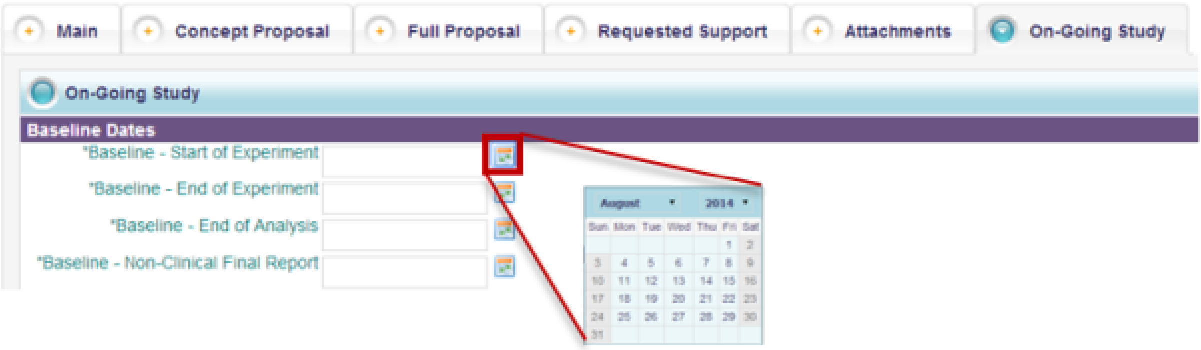
1. Click the link in the email message or the link below and ***log in*** to eRequest using your User ID and password**.**
2. From the **Task List**, locate the study available for updating. In this example, notice that the purple banner reads “*You Have 1 Request requiring Study Status Update”.*



3. Click the ***View or Add Status Update*** link

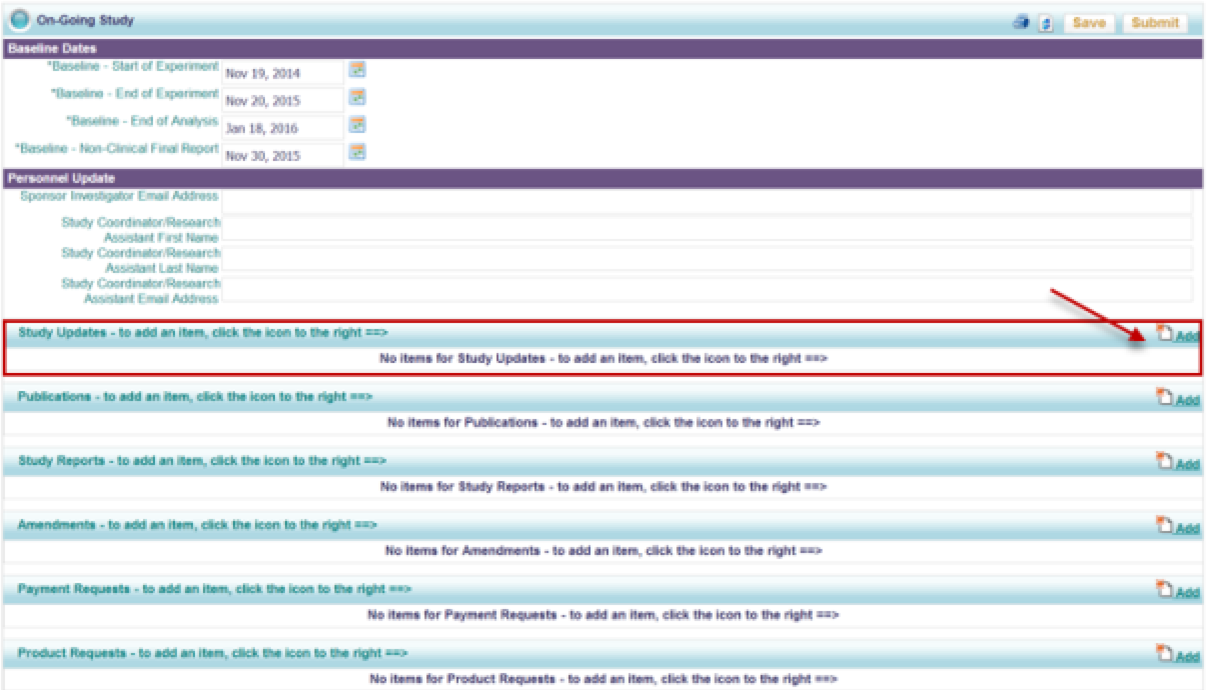
4. You will now be requested to enter additional information into the newly visible ***On-Going Study*** sub-tab

5. Update the Baseline Dates fields (as necessary) by clicking on the calendar icon next to each field

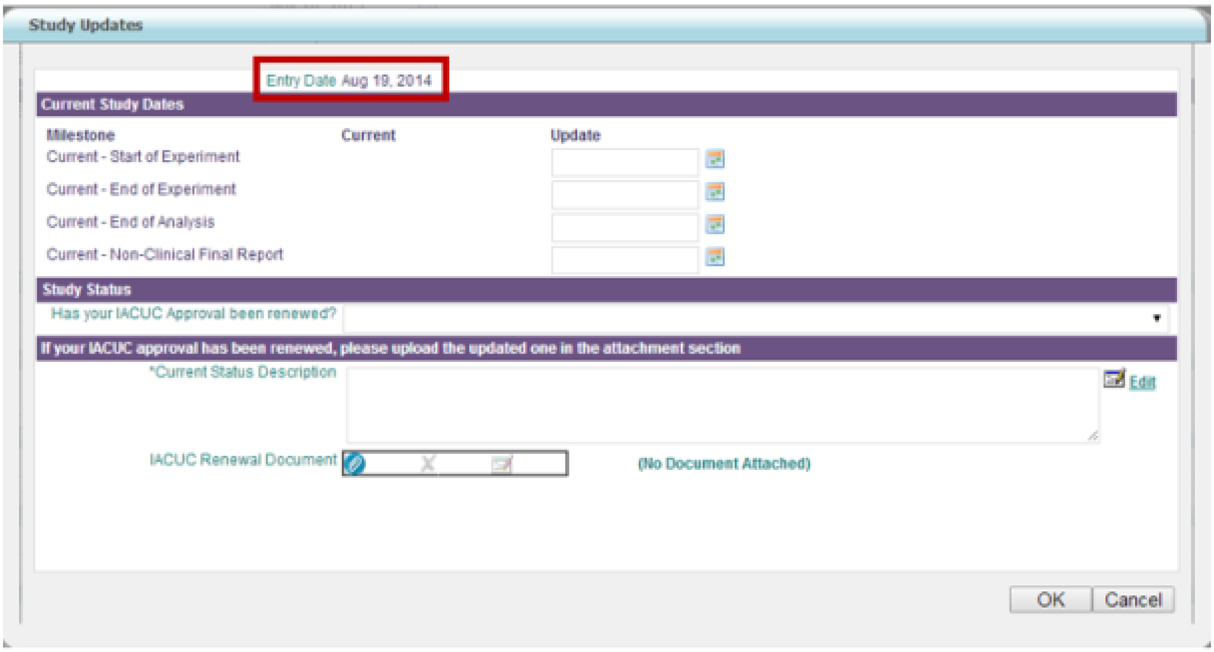


6. The system allows you to update the Personnel listed on your ***Request***, this information can be added at any time whilst the study is active.

7. You will be asked to update the ***Study Updates*** section to do this click on the Add button for the ***Study Updates*** section

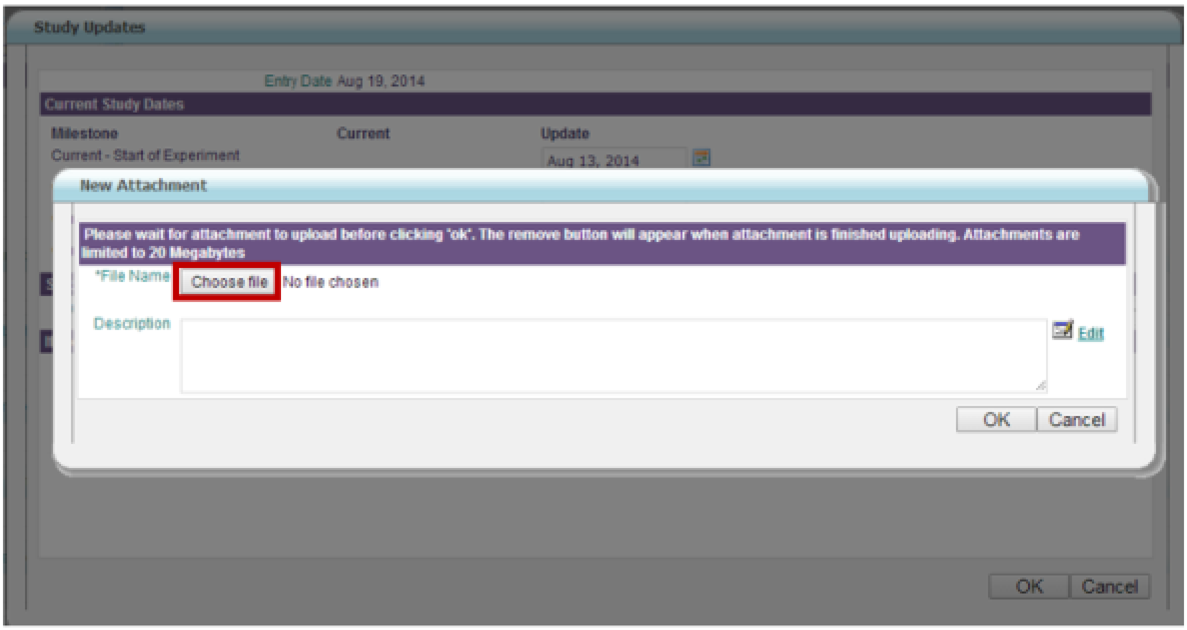


8. The pop-up window for ***Study Status Updates*** appears. Today's date is automatically filled into the Entry Date.



9. Review and update the current study Milestones.
10. Answer the question ***Has your IACUC Approval been renewed?*** by selecting an option from the drop down menu

11. Add your ***Current Status Description*** to the box
12. Attach the requested document (EC/IRB or IACUC Renewal Document), if applicable, by clicking on the ***paperclip*** icon
13. Select ***Choose File*** to navigate to the required file, click ***OK*** once it has been attached. Enter a description, if applicable.

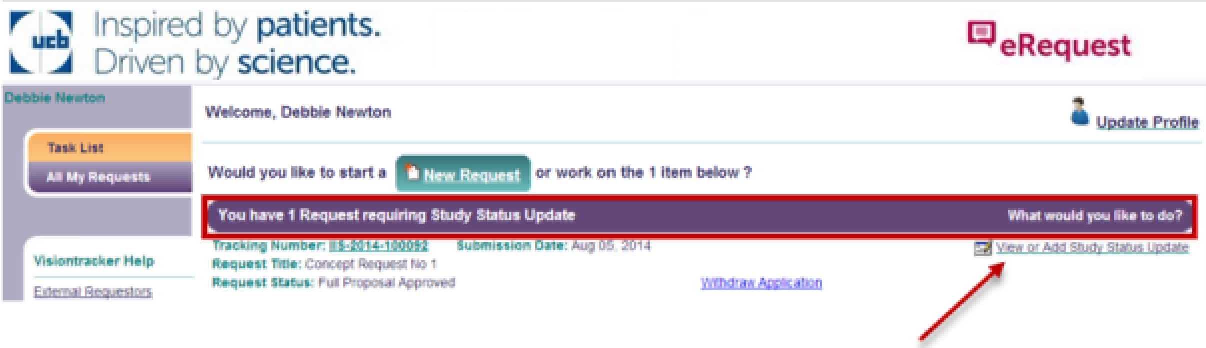


14. Click ***OK*** when your updates have been entered.
15. Click the ***Submit*** Submit button to send a notification to UCB that you have submitted information for review.

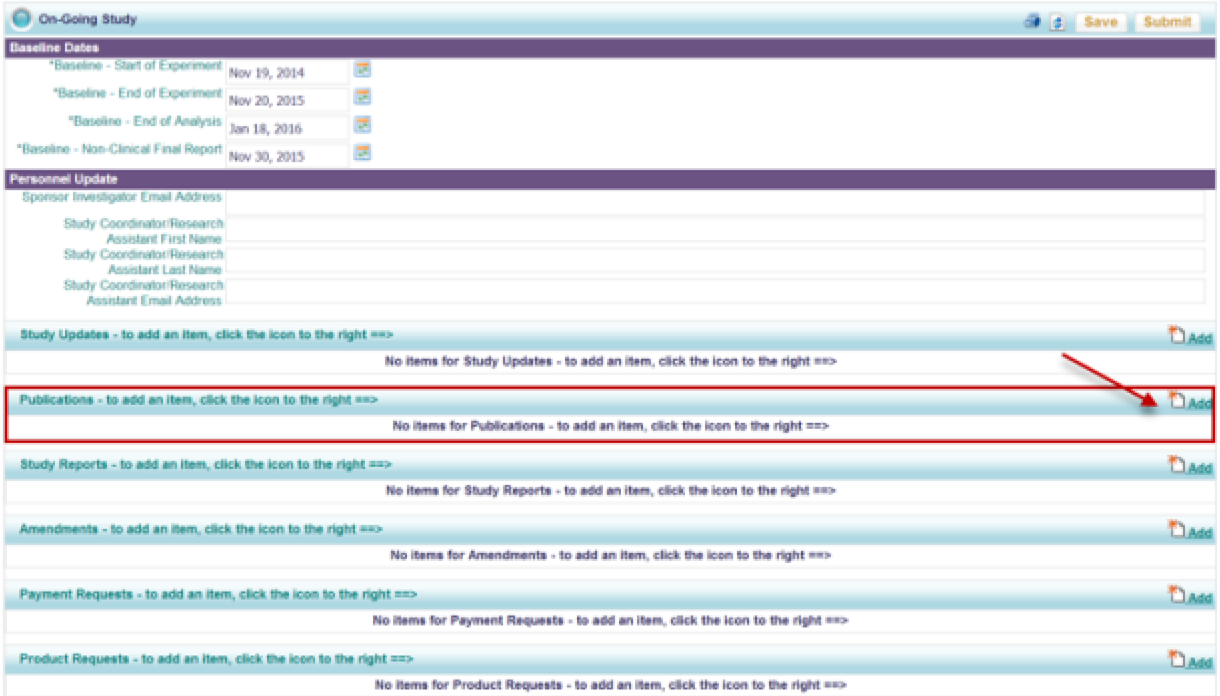
7 HOW TO SUBMIT A PUBLICATION/PRESENTATION

A publication/presentation may be submitted via the Study Status Update Tab following the process below. A publication update may be submitted while a study is active through closure of the study.

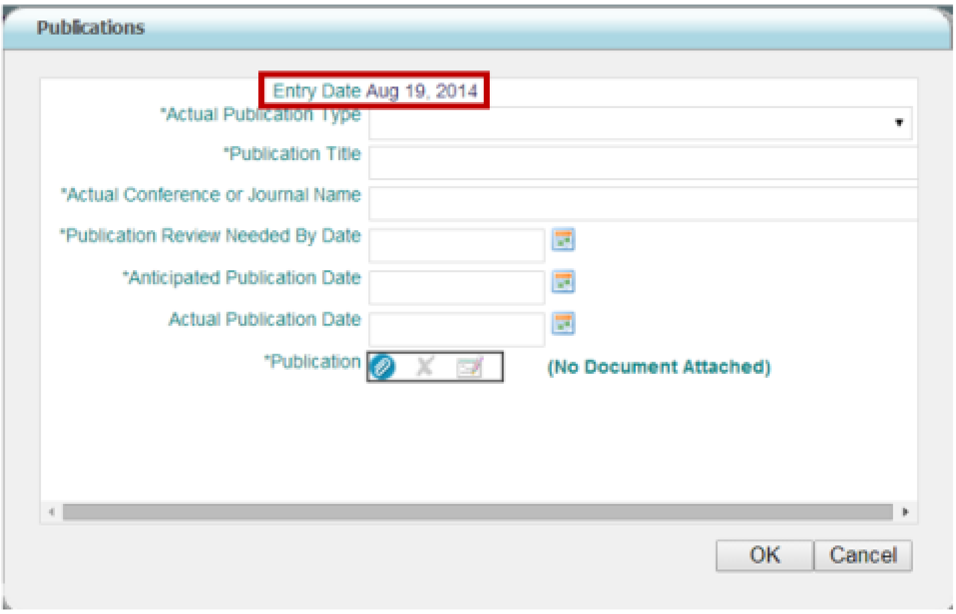
1. ***Log in*** to the eRequest system using your User ID and password.
2. From the **Task List** tab or **All My Requests** tab, locate a study displaying a link titled ***View or Add Study Status Updates***.
   - The existence of this link indicates you are able to provide information via the Study Status tab or provide additional attachments via the Attachments tab.
3. Click the ***View or Add Status Update*** link.



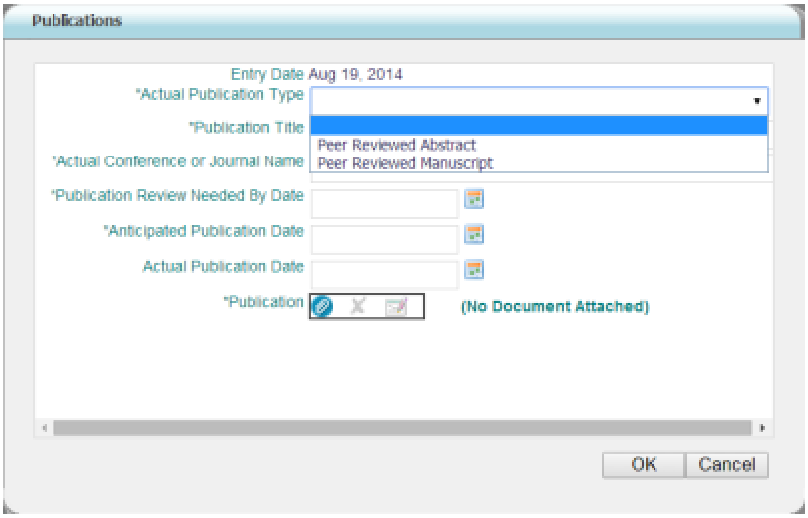
4. Locate the banner labelled ***Publications*** and click the ***Add*** link.



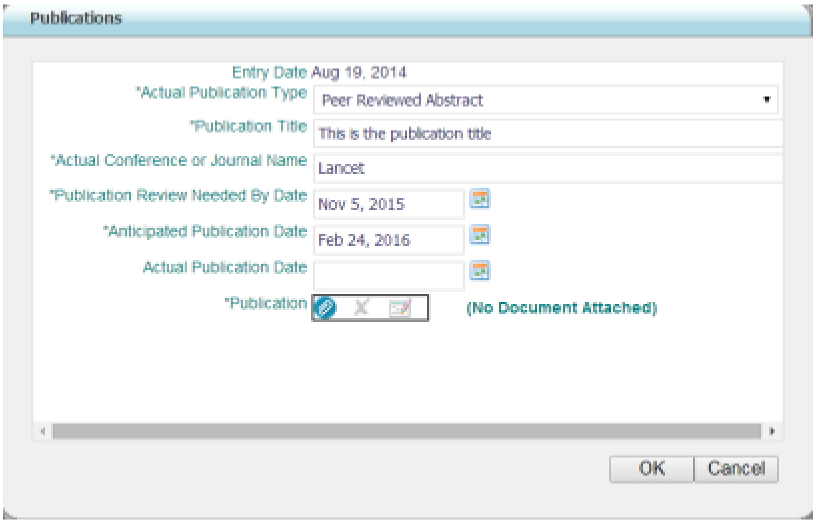
5. The pop-up window for ***Publication*** *Updates* appears.
   - Today's date is automatically filled into the Entry Date.



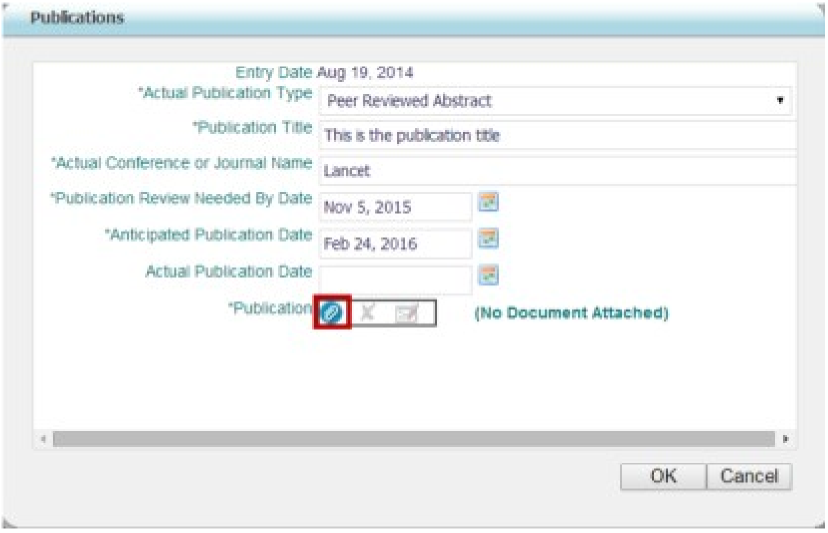
6. The required field *Publication Type* is marked with an * [asterisk].
    a. Select one of the options from the Publication Type drop-down list.



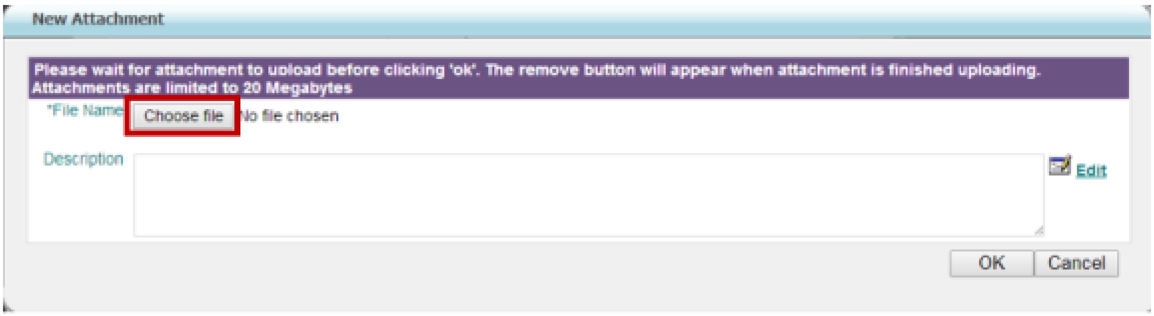
7. Complete as much detail as possible.



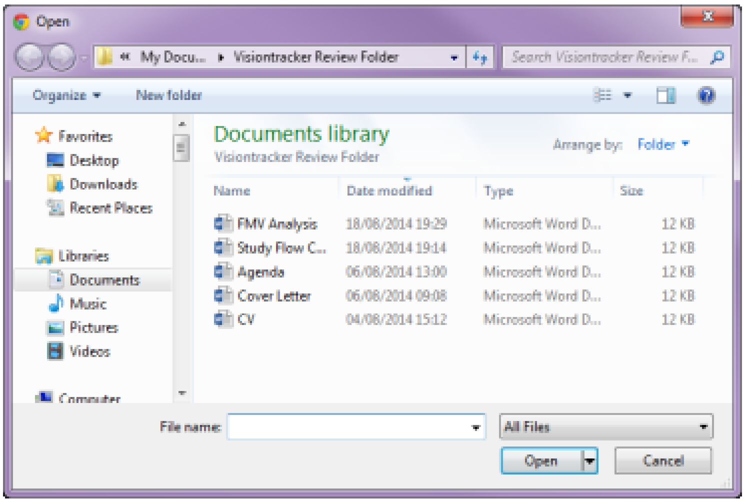
8. To attach relevant publication documents, click the paper clip icon next to the Publication label.



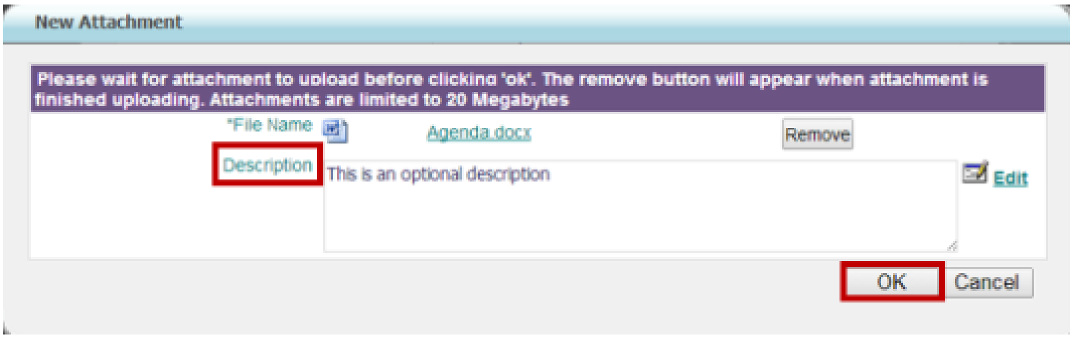
9. A pop-up window appears; click the ***Choose File*** button.



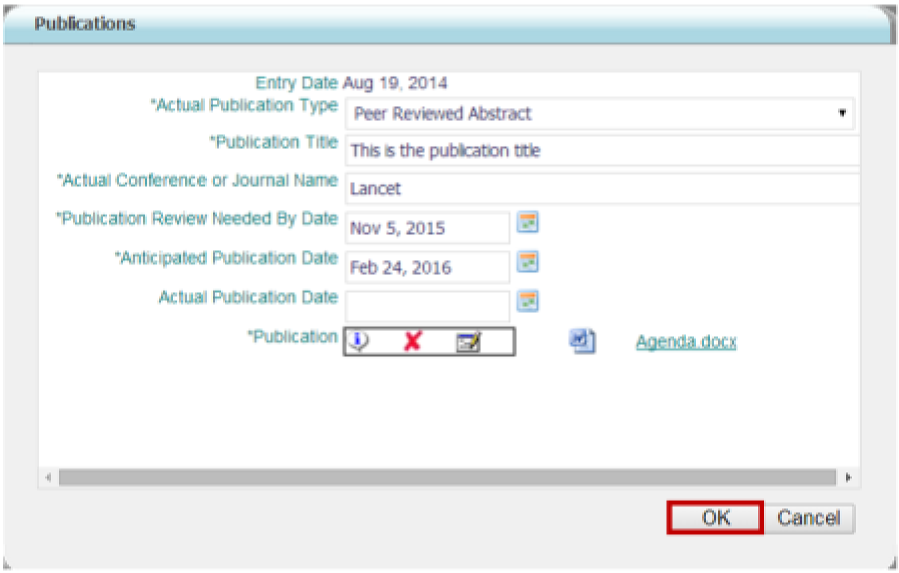
10. Navigate to the appropriate folder on your computer, highlight the file name, then click the ***Open*** button.



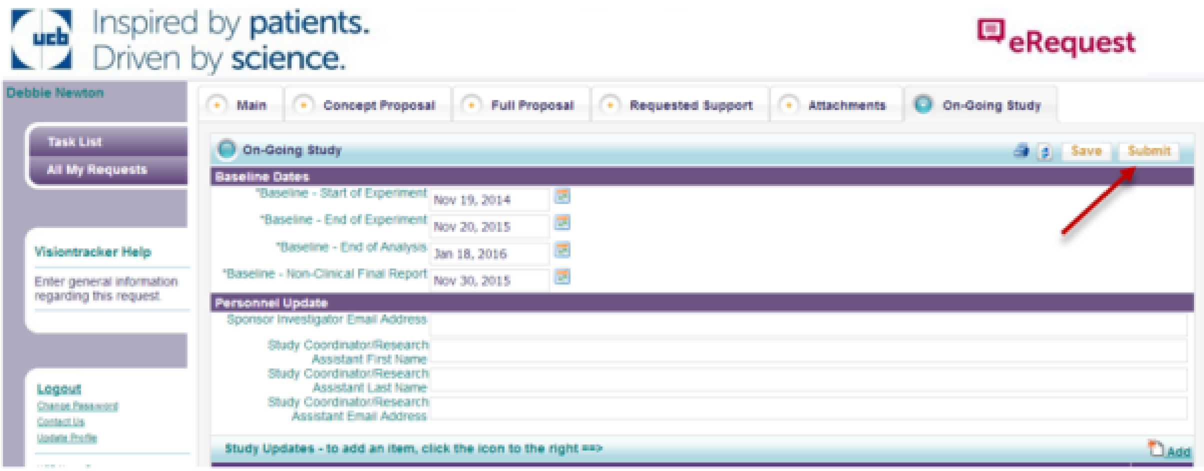
11. At the next screen, enter a description of the attachment (optional).



12. Click ***OK*** to close the *New Attachment* box.



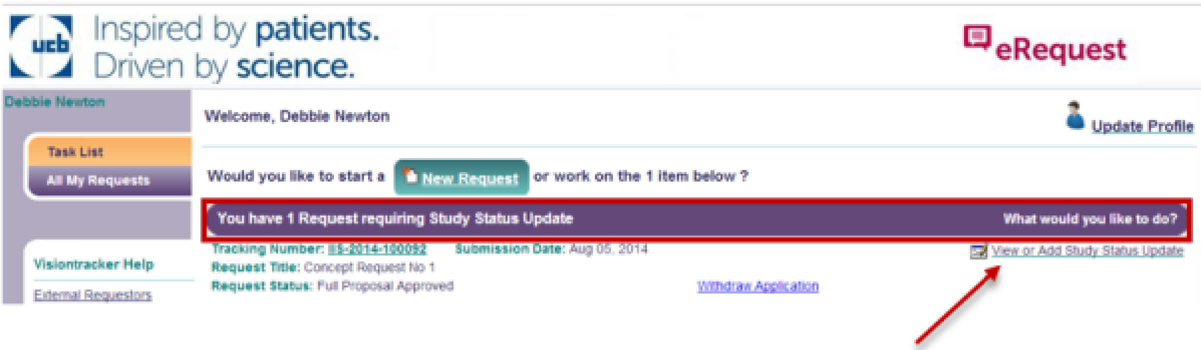
13. Click ***OK*** to close the ***Publication*** *Updates* window.
14. Click the ***Submit*** Submit button to send a notification to UCB that you have submitted information for review.



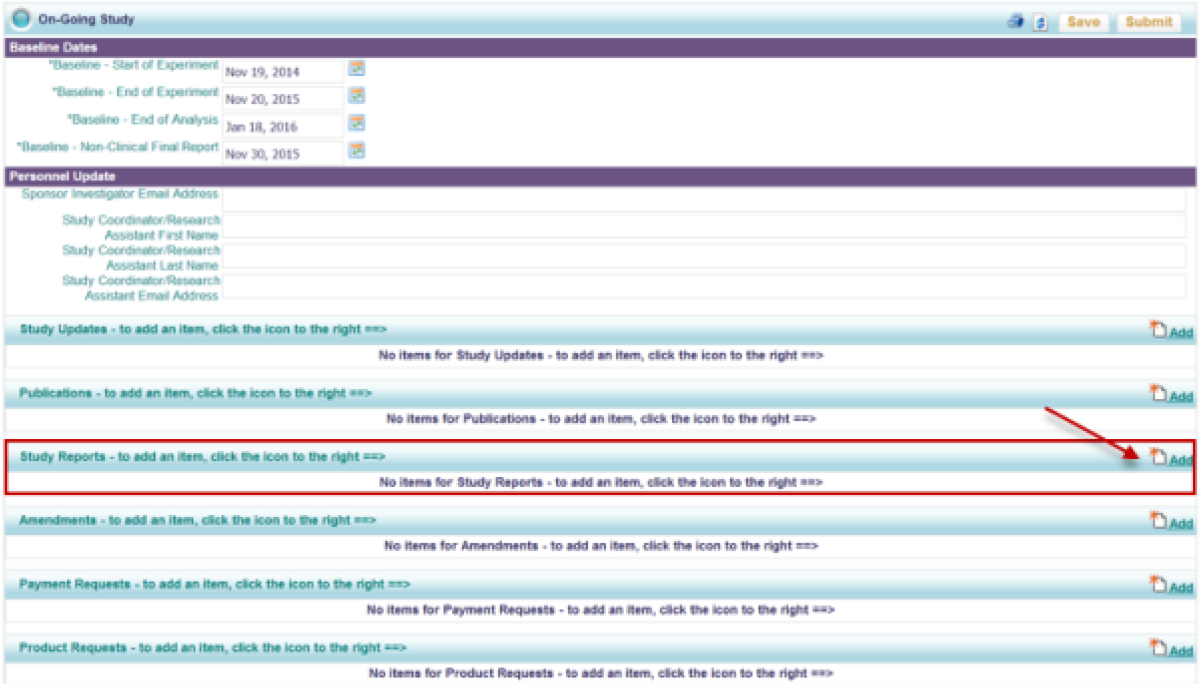
8 HOW TO SUBMIT STUDY REPORTS

Study Reports can be submitted via the On-Going Study tab once the study has been activated

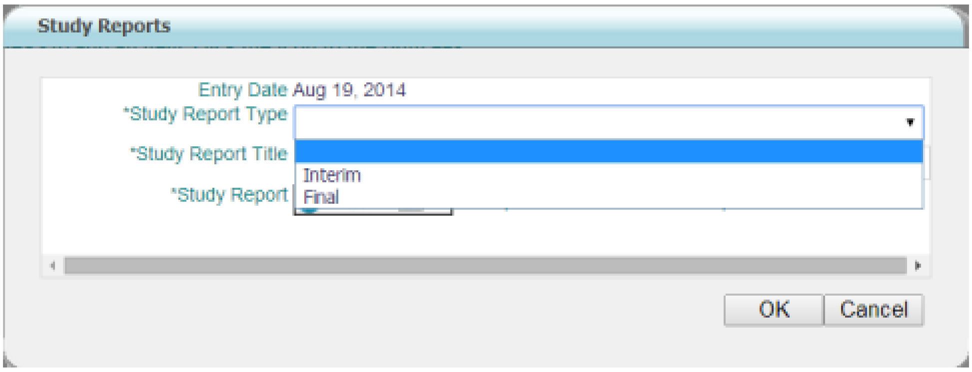
1. ***Log in*** to eRequest via the website below using your User ID and password
2. From the **Task List** tab or **All My Requests** tab, locate the study displaying a link titled ***View or Add Study Status Update***.
3. The existence of this link indicates you are able to provide information via **Study Status Update** tab or provide additional attachments via the **Attachments** tab.
4. Click the ***View or Add Status Updates*** link.



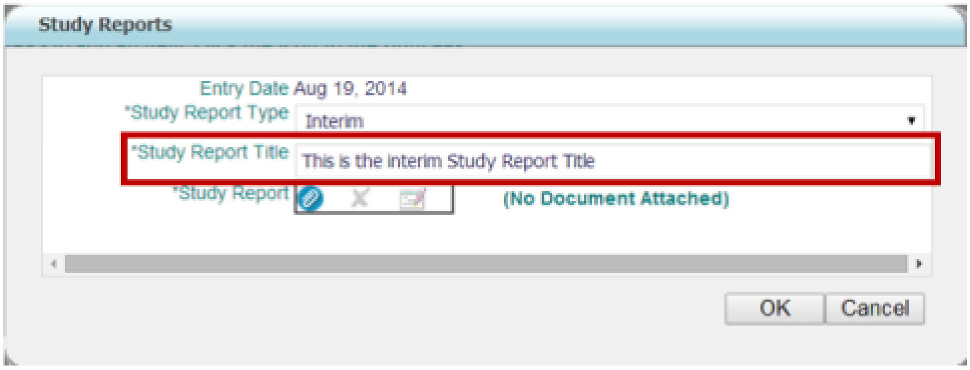
5. Locate the banner labelled ***Study Reports*** and click on the ***Add*** button



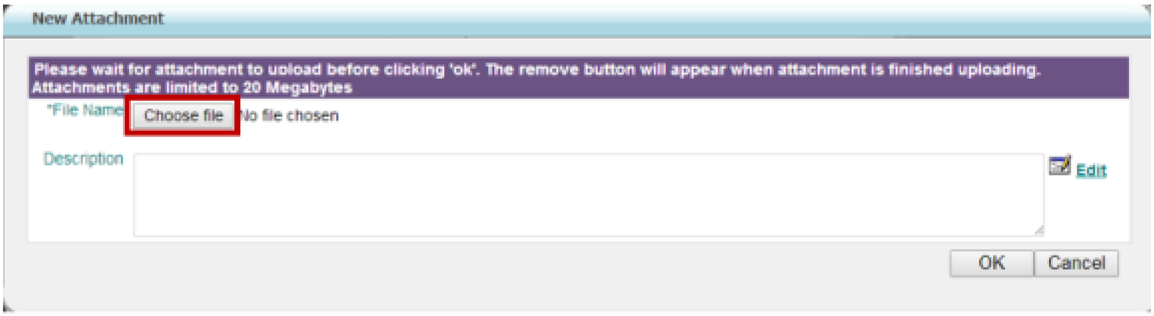
6. The pop up window for ***Study Reports*** will appear
   - Today's date is automatically completed in the ***Entry Date*** field
7. Select your ***Study Report Type*** *from the drop down menu*



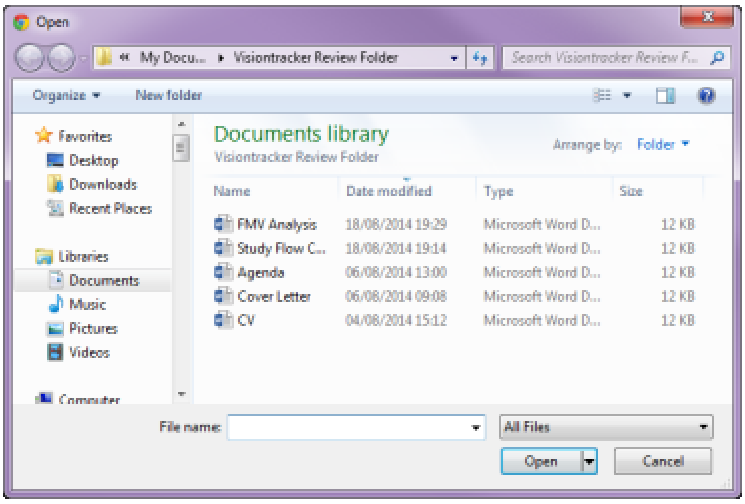
8. Complete the ***Study Report Title*** field



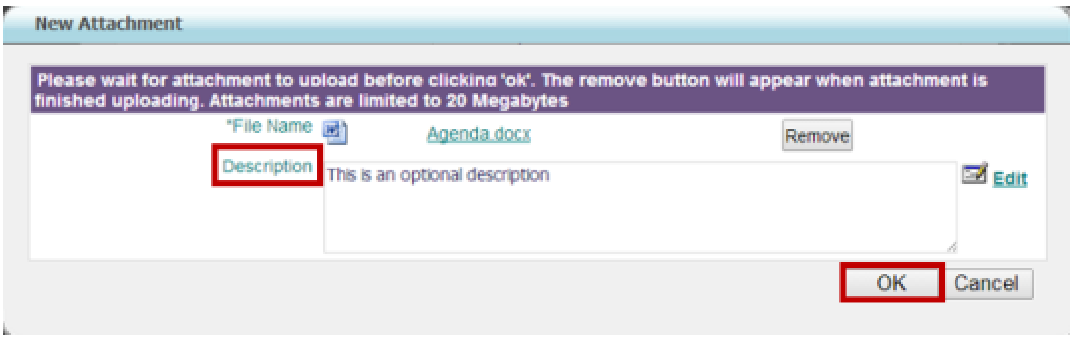
9. Attach your ***Study Report*** documentation by clicking on the ***paperclip*** icon
10. A pop-up window appears; click the ***Choose File*** button.



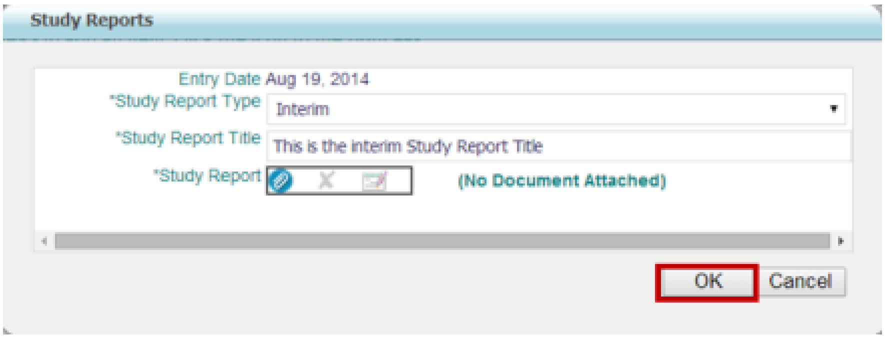
11. Navigate to the appropriate folder on your computer, highlight the file name, then click the ***Open*** button.



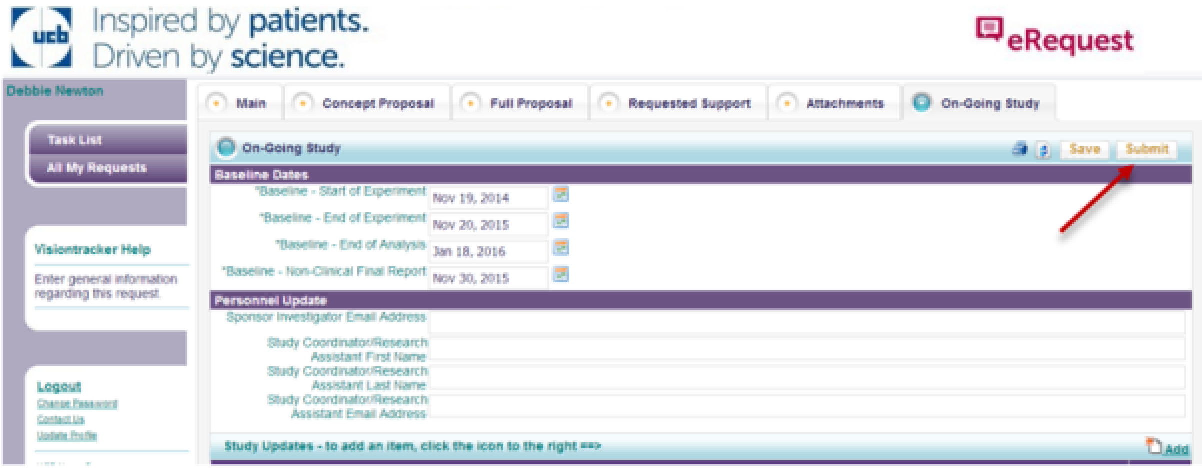
12. At the next screen, enter a description of the attachment (optional).



13. Click ***OK*** to close the ***New Attachment*** box.
14. Click ***OK*** to close the ***Study Reports*** window.



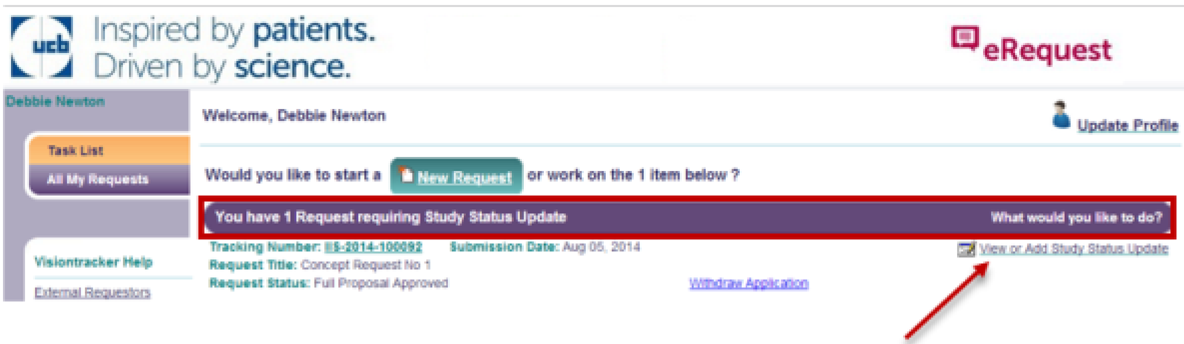
15. Click the ***Submit*** button to send a notification to UCB that you have submitted information for review.



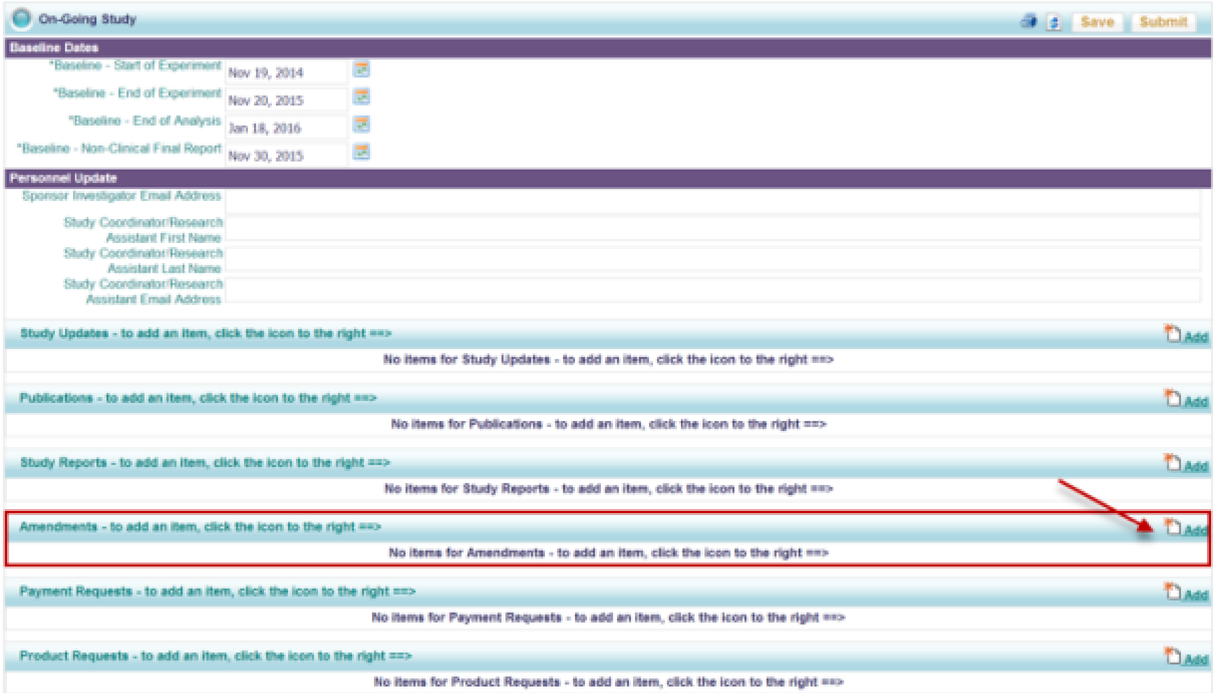
9 HOW TO SUBMIT AMENDMENTS

Amendments can be submitted via the **Study Status Update** tab. The option to submit an Amendment request is available once the study has reached 'Ongoing' status.

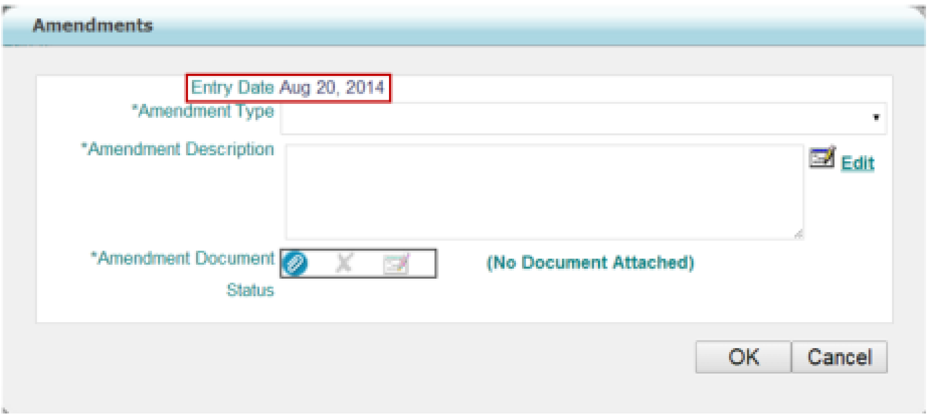
1. ***Log in*** to eRequest via the website below using your User ID and password***.***
2. From the **Task List** tab or **All My Requests** tab, locate the study displaying a link titled ***View or Add Study Status Update***.
    - The existence of this link indicates you are able to provide information via Study Status Update tab or provide additional attachments via the **Attachments** tab.
3. Click the ***View or Add Status Updates*** link.



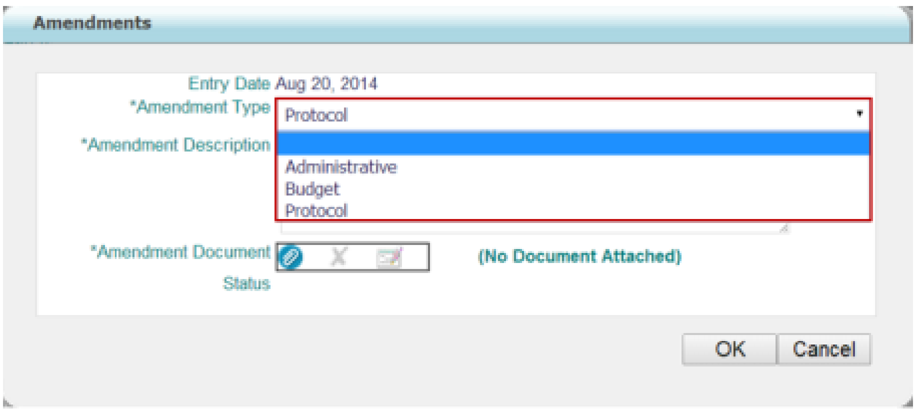
4. Locate the banner labelled ***Amendments*** and click the ***Add*** link.



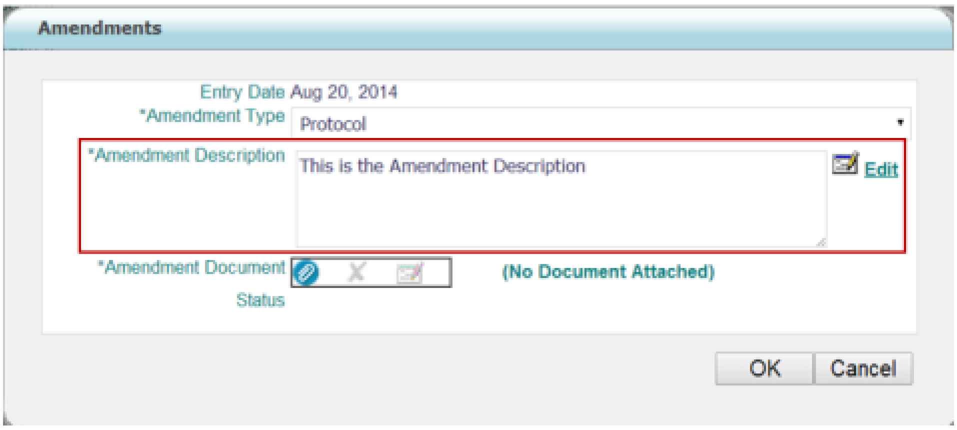
5. The pop-up window for ***Amendments*** appears.
   - Today's date is automatically filled into the Entry Date.



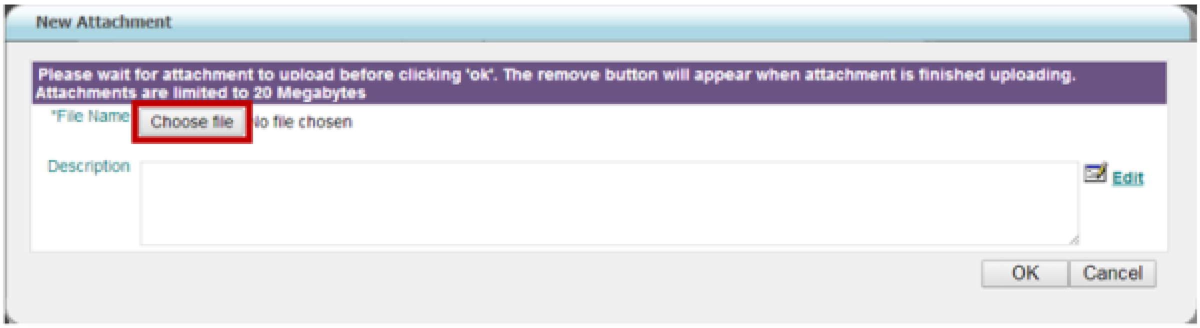
6. Select your Amendment Type from the drop down menu



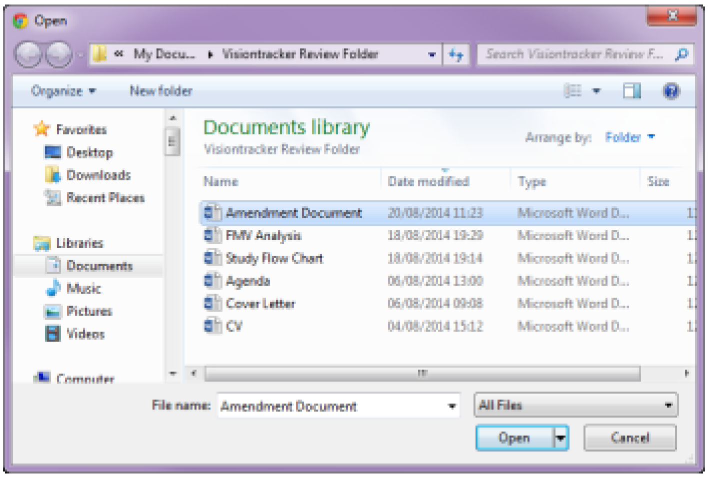
7. Add an *Amendment Description*



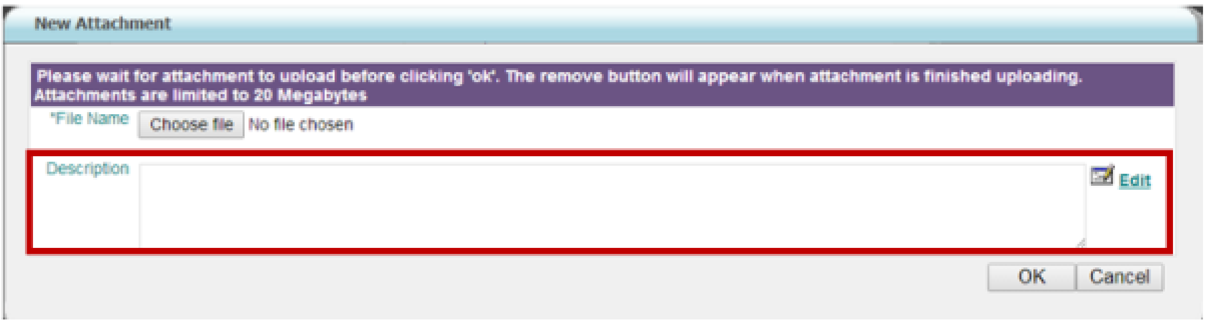
8. To attach the amendment, click the paperclip icon and then click the ***Choose File*** button to locate the file.



9. Highlight the filename, and then click the ***Open*** button.

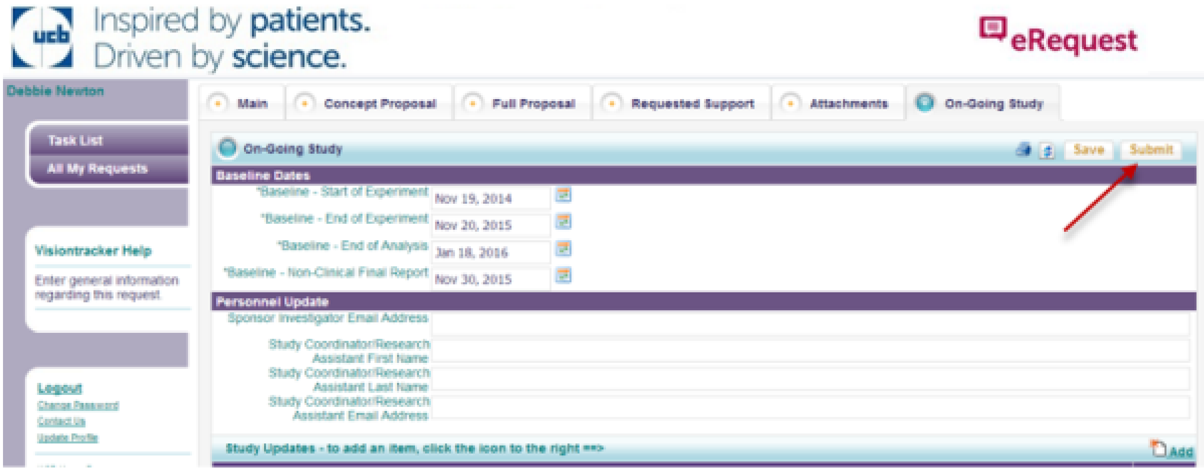


10. Enter a description of the attachment (optional).



11. Click ***OK***.
12. Click ***OK*** to close the *Amendments* pop up window.
13. Click the ***Submit*** 

button to send a notification to UCB that you have submitted information for review.



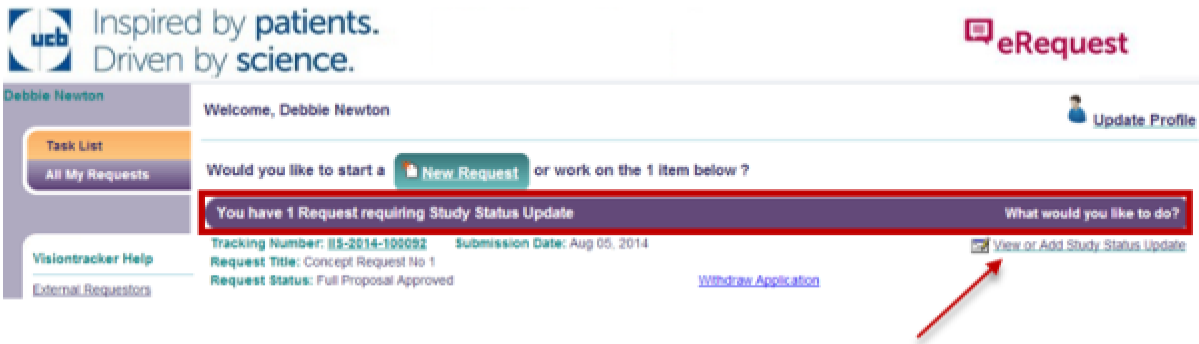
14. To view the status of this request, log back into the ***eRequest*** system with your log in details.
15. Open your Request via the ***Task List*** or the ***All My Requests*** tab by clicking on the Tracking Number.
16. Access the ***On-Going Study*** sub-tab, scroll down to the ***Amendments*** section.
17. Click on the ***Edit*** button.
18. The ***Amendments*** pop up box will appear.
19. View the ***Status***

10 HOW TO REQUEST PAYMENTS

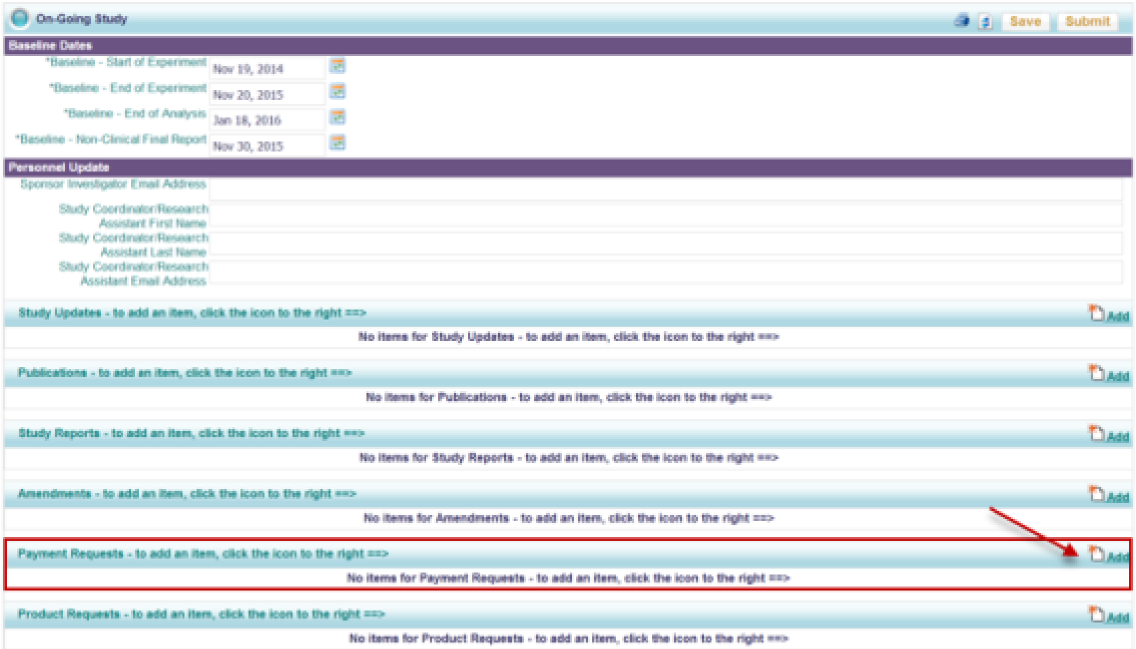
Note: this section is only to be used if ***Funding*** or ***Product & Funding*** options are selected during your initial Concept request

Payment Requests can be submitted via the **Study Status Update** tab once the study has been activated.

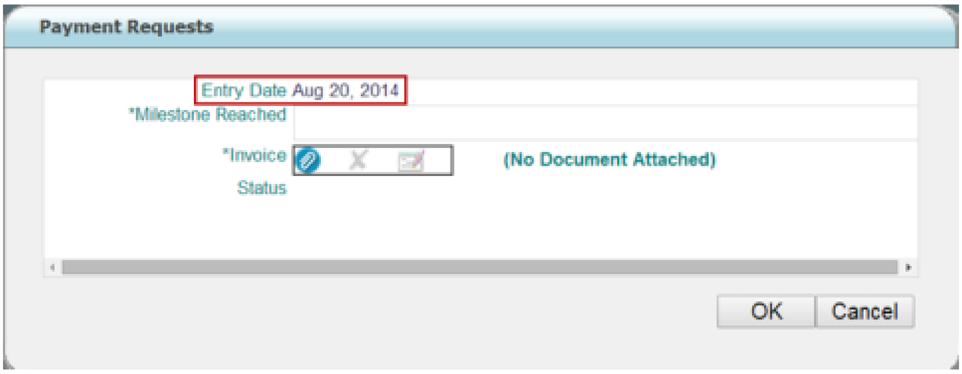
1. ***Log in*** to eRequest via the website below using your User ID and password***.***
2. From the **Task List** tab or **All My Requests** tab, locate the study displaying a link titled ***View*** *or Add* ***Study Status Update***.
    - The existence of this link indicates you are able to provide information via Study Status Update tab or provide additional attachments via the Attachments tab.
3. Click the View or Add Status Updates link.



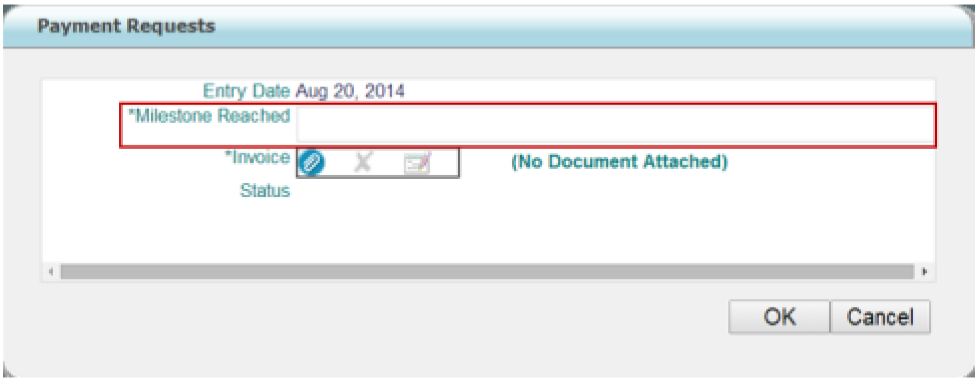
4. Locate the banner labelled ***Payment Requests*** and click the ***Add*** link.



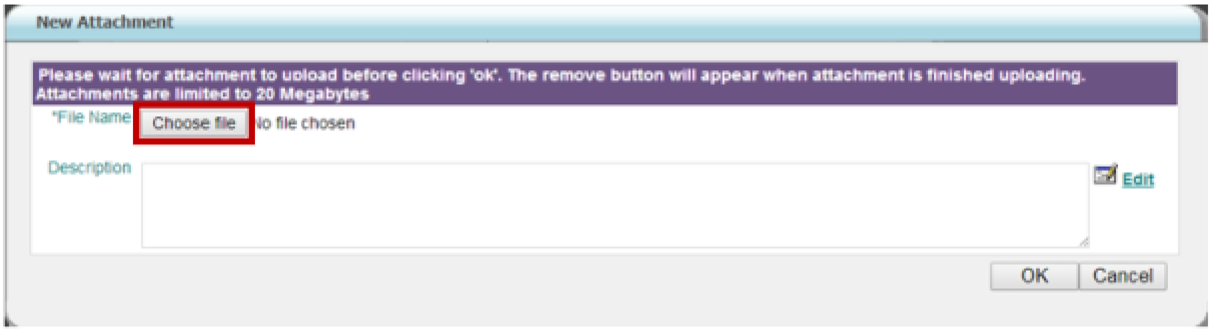
5. The pop-up window for ***Payment Requests*** appears.
    - Today's date is automatically filled into the Entry Date.



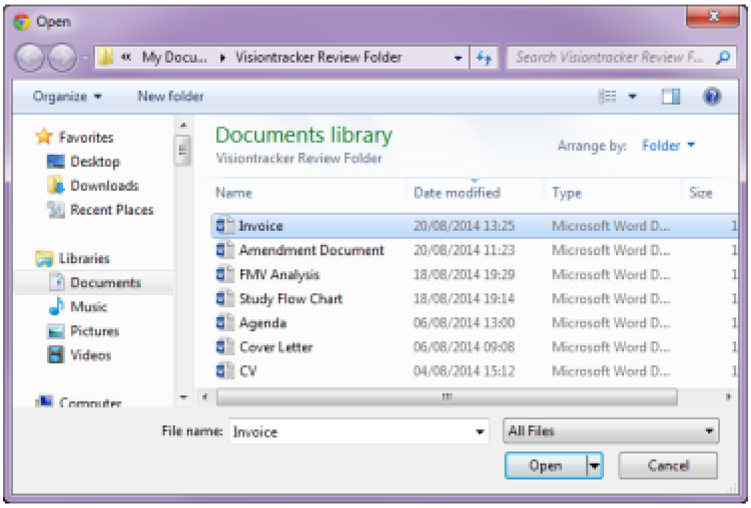
6. Complete the *Milestone Reached* field



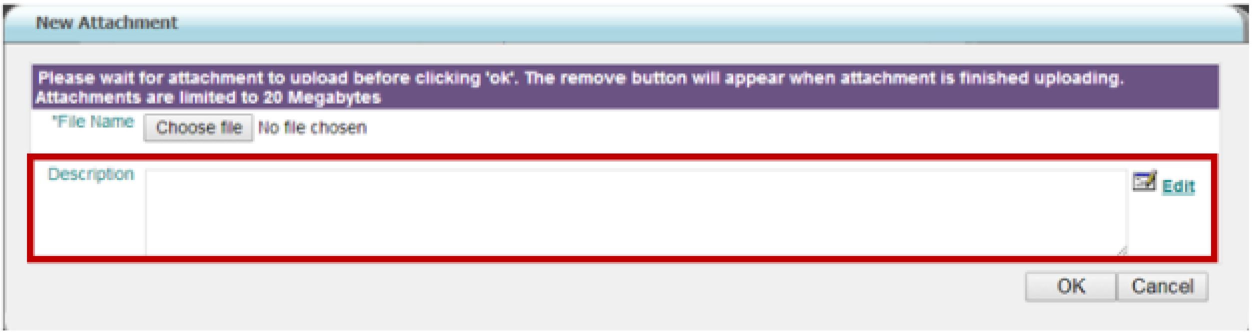
7. To attach the amendment, click the paperclip icon and then click the ***Choose File*** button to locate the file

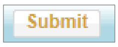


8. Highlight the filename, and then click the ***Open*** button.

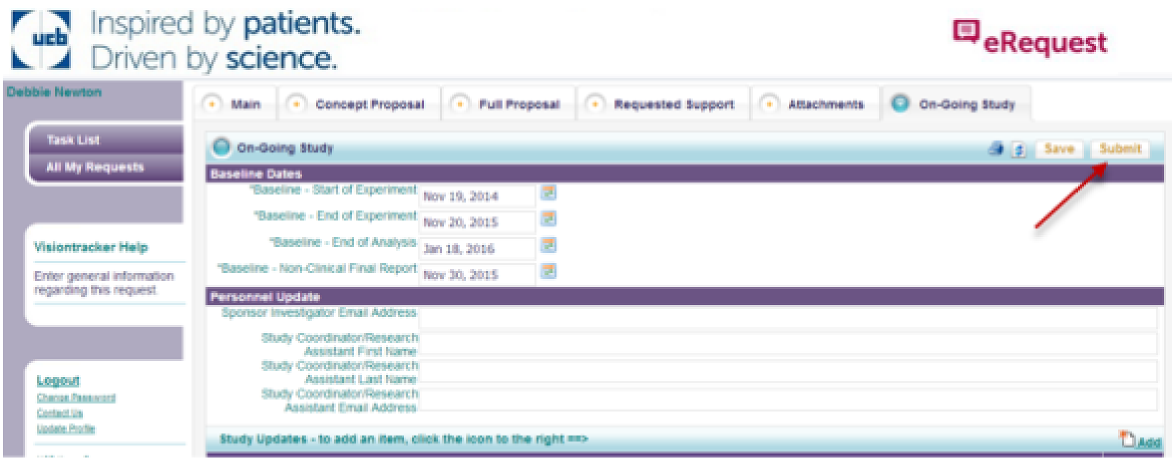


9. Enter a description of the attachment (optional).

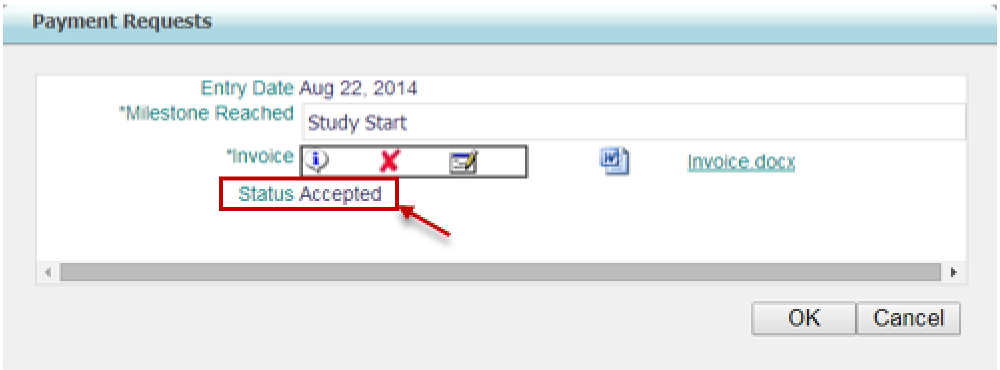


10. Click ***OK***.
11. Click ***OK*** to close the *Payments Request* pop up window
12. Click the ***Submit*** 

button to send a notification to UCB that you have submitted information for review.



13. To view the status of this request, log back into the ***eRequest*** system with your log in details.
14. Open your Request via the ***Task List*** or the ***All My Requests*** tab by clicking on the Tracking Number.
15. Access the ***On-Going Study*** sub-tab, scroll down to the ***Payment Requests*** section.
16. Click on the ***Edit*** button.
17. The **Payment Requests** pop up box will appear.
18. View the ***Status.***

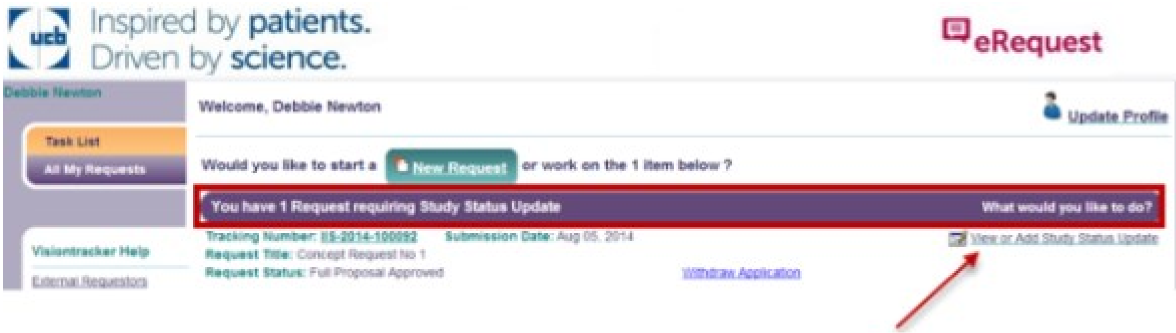


11 HOW TO REQUEST PRODUCTS

Note: this section is only to be used if ***Product*** or ***Product & Funding*** options are selected during your initial Concept request

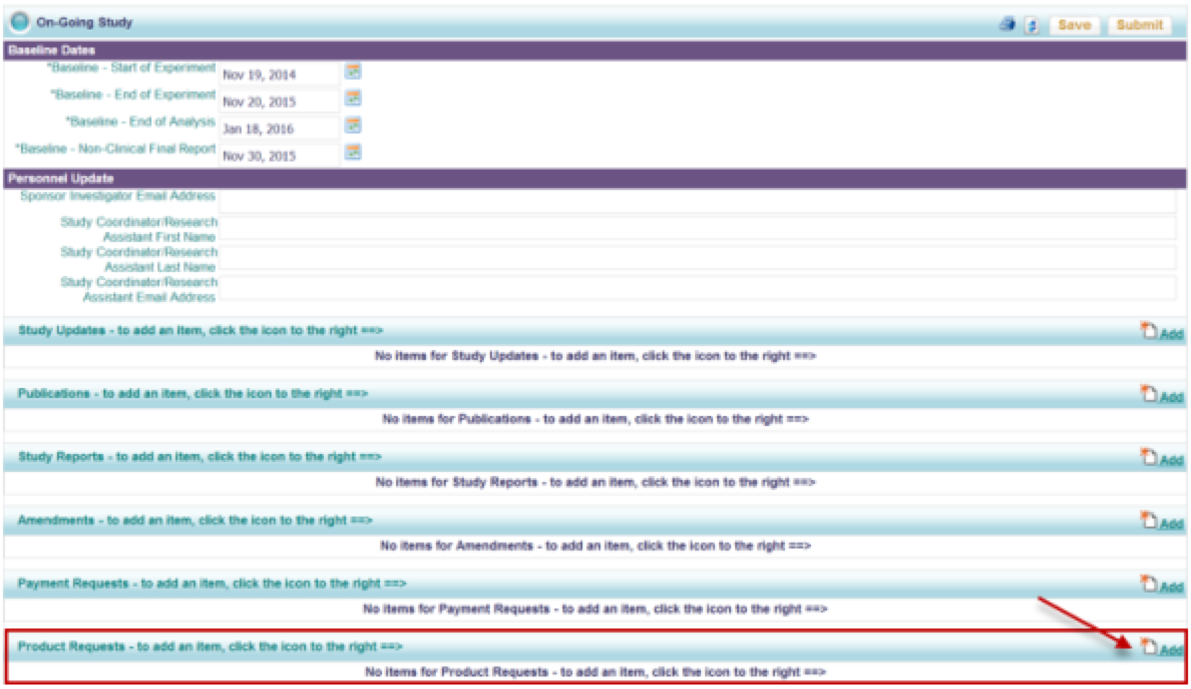
If you require additional product, follow the process below.

1. ***Log in*** to eRequest via the website below using your User ID and password***.***
2. From the **Task List** tab or **All My Requests** tab, locate a study displaying a link titled ***View or Add Study Status Updates***.
   - The existence of this link indicates you are able to provide information via the **Study Status** tab or provide additional attachments via the **Attachments** tab.

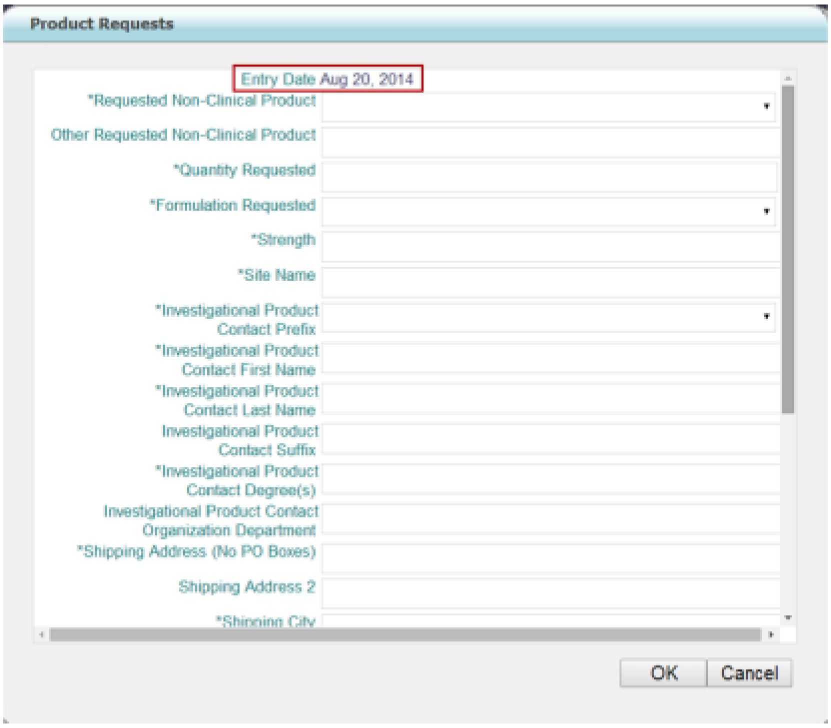


3. Click the ***View or Add Status Updates*** link.

4. Locate the banner labelled ***Additional Product Request*** and click the ***Add*** link.



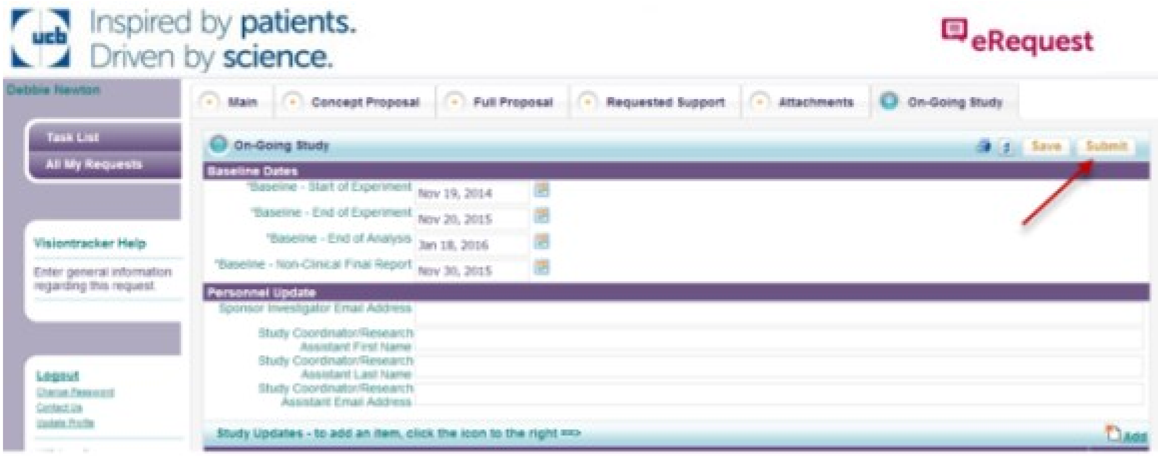
5. The pop-up window for *Additional* ***Product Request*** appears.
   - Today's date is automatically filled into the Entry Date

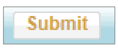


6. Complete the required fields marked with an * [asterisk]

   Note: Ensure your Shipping address is the same as the original Pharmacist's address (Exception: multi-site studies; shipping addresses must be consistent. Immediately notify your IIS Coordinator if shipping addresses are changed.)

7. Click ***OK***.



8. Click the ***Submit*** 

button to send a notification to UCB that you have submitted information for review.

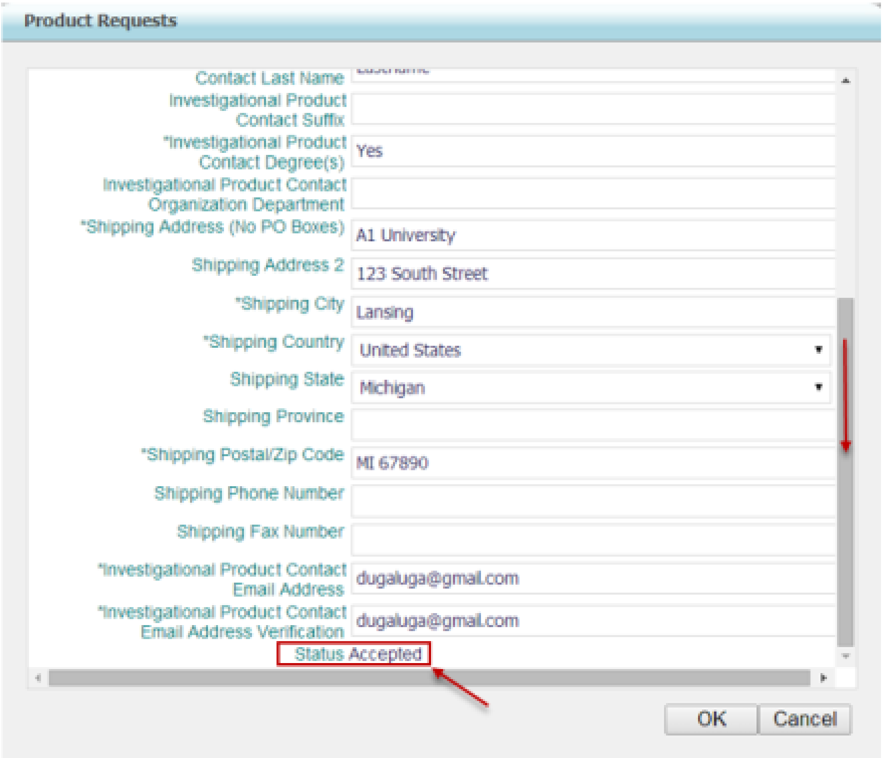
9. To view the status of this request, log back into the ***eRequest*** system with your log in details.

10. Open your Request via the ***Task List*** or the ***All My Requests*** tab by clicking on the Tracking Number.

11. Access the ***On-Going Study*** sub-tab, scroll down to the ***Product Requests*** section.

12. Click on the ***Edit*** button.

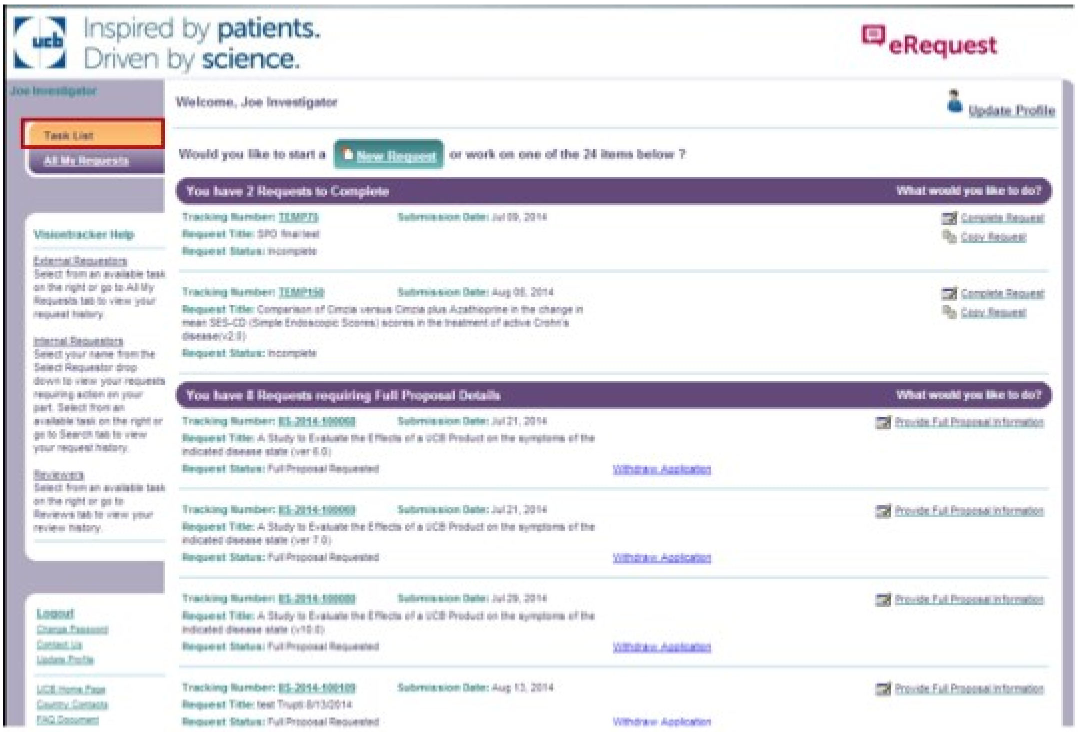
13. The ***Product Request*** pop up box will appear, scroll to the bottom of the screen.
14. View the ***Status.***



12 TASK LIST & ALL MY REQUESTS

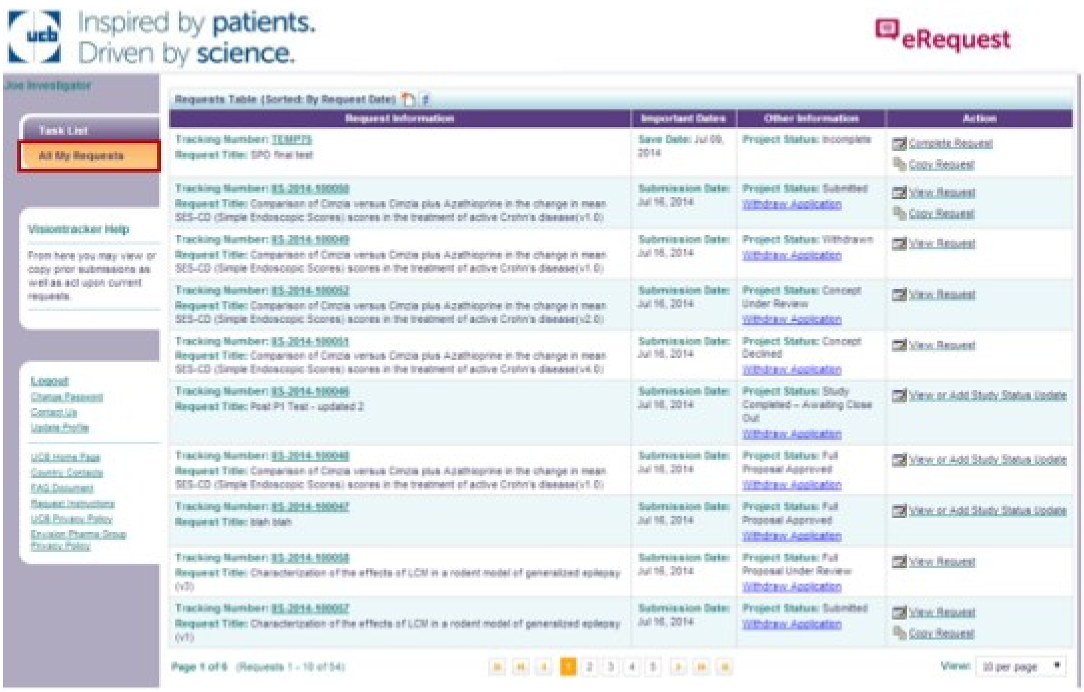
It is possible to access Requests that require immediate attention and your previously submitted or ongoing requests using the ***Task List*** and ***All My Requests*** tabs.

1. ***Log in*** to eRequest via the website below using your User ID and password.
2. The ***Task List*** will be visible and will list those Requests that require your immediate attention



3. You will notice that your Requests are listed under *headers* to assist you perform your actions

4. To access the full list of previously saved or submitted Requests click on the ***All My Requests*** **tab**



5. To access your Request (in either tab) either click on the **Tracking Number** or the *Action* listed in the ***Action*** column

13 FREQUENTLY ASKED QUESTIONS (FAQS)

13.1 HOW CAN I GET HELP?

To receive technical support while using eRequest, contact UCB using the directions below. UCB supports the eRequest system.

From the web portal:

1. Click the ***Contact Us*** link (left column of the page).

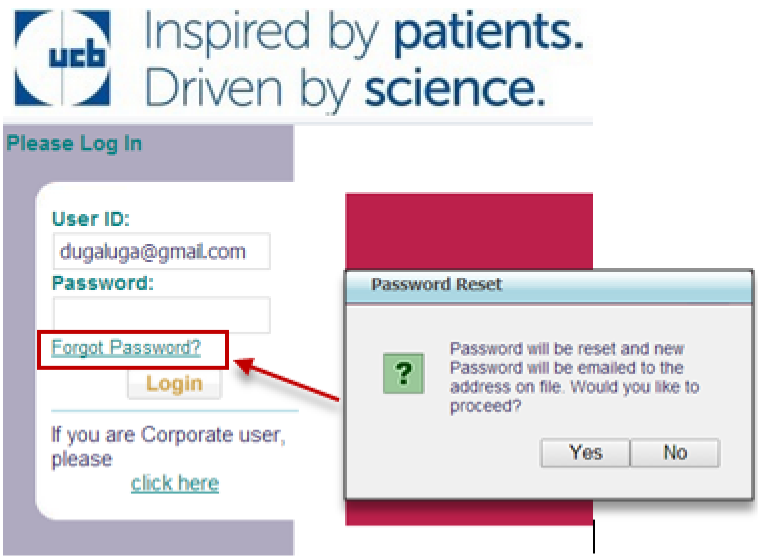
2. Select ***UCB Technical Support*** from the ***Address to*** field.
3. Select a ***Subject*** from the drop-down menu.
4. Select a ***Related to*** item from the drop-down menu.
5. Type your ***Message*** into the box.
6. To attach a screen shot or other documentation, click the ***Choose File*** button, navigate to the file location, click on the file name, and then click the ***Open*** button.
7. When finished, click ***Send***.

13.2 WHAT IF I CAN'T LOGIN

Double-check that you have entered your user ID entered correctly.

If you do not recall your User ID, contact UCB directly using the instructions above

If you have forgotten your password, click on the Forgot Password link.



1. Click ***YES*** to proceed
2. The system will send a temporary, one-time-use password via email. After you have received your new password, you can log in and you will be required to create a new password. You can then log in with the new password.

13.3 WHAT IF I HAVE A QUESTION ABOUT MY SUBMISSION?

1. For questions regarding a submission, you may contact UCB by clicking the ***Country Contacts*** link on the left side of the page.

2. You will be redirected to the ***Country Contacts*** document. Scroll to page 2 and locate your local contact information

Technical Support

Would you encounter any technical issue to access or use this website, please send an email to:
erequest_support@ucb.com
Please note that currently we can only process emails written in English.

Local Contact Details

To be used for non-technical issues.
This list contains only countries where eRequest is currently available.

Belgium		ucbnl@ucb.com
Denmark		ucbnl@ucb.com
Finland		ucbnl@ucb.com
Netherlands, The		ucbnl@ucb.com
Norway		ucbnl@ucb.com
Sweden		ucbnl@ucb.com
United States		grants@ucb.com / (+1) 866 291 0804

13.4 HOW LONG DOES MY SESSION LAST IN THE SYSTEM?

Your web session will time out after 60 minutes and you will be prompted to reenter your Username and Password information. Like many other Web applications, this time limit exists for security purposes.

If using Internet Explorer, you might try refreshing the browser memory. However, if you left the browser window open for more than 60 minutes with an incomplete study proposal:

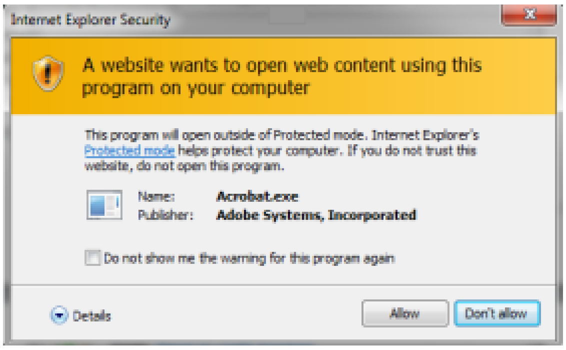
1. Press ***F5***, then click the ***Logout*** button in the left column.
2. ***Exit*** out of the browser, completely shutting it down.
3. ***Open*** Internet Explorer again and ***log in*** to the web link.
4. Press ***F5*** and see if your data were recovered.

We recommend that Investigators save their work often to avoid this issue. When stepping away for a while, investigators should log off the system rather than leave the browser window open.

13.5 HOW DO I PRINT MY SUBMITTED APPLICATON?

1. ***Log in*** to the eRequest system using your User ID and password.
2. Click on the All My Requests tab.
3. Click on the ***Tracking Number*** of the study you wish to print.

4. This will bring you to the submission. Click the ***print*** icon located in the top right corner.
5. A PDF file is automatically created for you to print or save.
    - Some internet browsers automatically open the file.
    - If that does not happen, you may need to locate the PDF file named *Grant Detail Report* in your download folder.
    - You may see a security warning; if so, click ***Allow*** for permission to open the file.



6. To print, ***Open*** the *Grant Detail Report* file.
7. When the file opens, click the ***File menu*** and then click ***Print.***