Guide to the Use of Researcher Profile

Safety Coordinators

Who will need safety training completions added to their account?	On **April 1, 2013** all <u>new</u> course completions, for all categories listed in the right column, will be entered into **eBridge *Researcher Profile*** and tracked. Taking a "phased in" approach for legacy data, previously completed Safety Courses will be added as per the schedule in the right column of this **Guide**.
Where do I find a User's Researcher Profile?	A **User's *Researcher Profile*** is accessed by logging in to **eBridge** through your own account. The role of **Safety Coordinator** has been added to your account by the Help Desk. Simply select the ***Researcher Profiles*** tab in the green navigation area at the top of the **"My Home"** screen. Search for the **User's** account you wish to update.
How do I update a User's Researcher Profile?	As a **Safety Coordinator,** you have an activity on the **User's *Researcher Profile*** **"Workspace"** - ***"Update Safety Training Data"***. There is an area to check the box for **"Safety Training Participant"**, the add button for **"Safety Training Course Records"**, and checkboxes for **"Safety Training Categories to be tracked"**.
How do I add a category to a User's Researcher Profile?	Navigate to the **User's *Researcher Profile*.** Select **"Update Safety Training Data"**. Check the appropriate box under **"Safety Training Categories to be Tracked"**.
When do I inactivate a User's Safety Category on a User's profile?	When a **User** has verified that he/she no longer needs to track a particular safety training category, select **"Update Safety Training Data"**, uncheck the category box and select **"OK"**.
When do I inactivate a User's Safety Participant checkbox?	When a **User** has verified that he/she no longer needs to track any safety training, select **"Update Safety Training Data"**, uncheck the **"Safety Training Participant"** checkbox and select **"OK"**. (No need to uncheck categories)

Additional Guidance—Status and Notification Sections

There are three sections under the Safety Training tab within a user's profile:

1) Current 2) Expired 3) Archived

1) **Current**—Items under this heading are currently being tracked because its category is checked and reflect an up-to-date status. Email expiration notifications are sent to the user as well as to the Safety Training Administrator in the account holder's department.
2) **Expired**—Items under this heading are currently being tracked, its category is checked, and items are expired. Daily email expiration notifications are sent to the user.
3) **Archived**—Items under this heading are ones that: **a)** are no longer being tracked because its category has been "unchecked"; OR **b)** the course has been superseded by a more recent one.

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<u>Safety Training Legacy Data Schedule</u>

Until a User's course history is entered into eBridge, the tracking of that course will not be active. After March 30, 2013, the active tracking will be on new completions, until the dates below, when older records will be imported into eBridge.

rDNA - 3/30/2013

All Shipping - 3/30/2013

BSL3 - 4/1/2013

Formaldehyde - 4/1/2013

Laboratory Chem Safety - 4/22/2013

Bloodborne Pathogens - 5/13/2013
(BBP includes MCW affiliate institutions)

<u>Key Places</u>

History Log—check here for comments, account activity. Select an item to view its **Property Changes**, **Documents**, and **Notifications**. If a **User** does not think he/she is receiving the notifications, you can check here for a list of recipients.

Safety Training Private Comments—
Use this communication tool as specified by the EHS staff.

Checkbox for Safety Training Participant—activates a **User's** Safety Training in ***Researcher Profile.***

Interim Change—History Log entry that happens when a double pop up box is partially completed and then closed without saving, or a time-out happens prior to saving. Data entered may/may not be saved, but this error always creates the **"Interim Change"** activity in the History Log as a warning.

Request Update of Safety Training Categories—Activity on a **User's Workspace** that generates an email to the **Safety Coordinator**.

Need assistance navigating eBridge?

Please contact the eBridge Help Desk
help-ebridge@mcw.edu
414-955-8476

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Helpful hints about content in specific sections:

Topic/Activity	Location	Special Comments and Tips
Accessing a Researcher Profile	My Home	After logging in, **User** accesses by using either the link found on **"My Home"**, or the navigation tab ***Researcher Profiles*** found in the upper green area of the **"My Home"** screen. The **User** will only view his/her own profile and the profiles of those who have granted him/her access. After logging in, **Safety Coordinator** accesses by using the navigation tab ***Researcher Profiles*** found in
Update Safety Training Activity	Researcher Profile Workspace	⇒ Select the button on the left side of the ***Researcher Profile*** **"Workspace"**. This is the area under **"My Activities"** in the green bar.
Log Safety Training Private Comments Activity	Researcher Profile Workspace	⇒ Private comments are those that can be viewed by the following roles: **Safety Coordinator**, **eBridge Help Desk/Site Admin** . Use this communication tool as specified by the EHS staff.
Safety Training Tab	Researcher Profile Workspace	⇒ Use this feature for a quick view of a **"User's"** training activity, including whether or not **Safety Training** is being tracked.
Researcher Profile SmartForm Sections	Researcher Profile Workspace	⇒ The information on the **"Safety Training Tab"** can also be found by selecting **"View Profile"** from the top left area of the ***Researcher Profile*** **"Workspace"**, then navigating through the **SmartForm** pages by using the **"Jump To"** menu and selecting the **"Safety Training Data"** section. If a user has a general question about something in their own ***Researcher Profile***, please direct them to either the tab or their own **SmartForm** sections. (Note: only sections A and B are editable by **User**)
Add, Update, or Delete a training record	Update Safety Training Pop Up Box	⇒ Always use the **"Add"** button when adding a course completion to a **User's** safety training course records, even if there is another entry that it will replace. By using the **"Add"** button, the expiration dates are set appropriately each time, and the new course will supersede the old course, which will move to the **"Archive"** section. ⇒ Only use the **"Update"** button if you have entered an item incorrectly and need to edit it. ⇒ Only use the **"Delete"** button when you need to completely delete an entry due to error. Expired or superseded courses will automatically move appropriately to either the **"Expired"** or **"Archive"** sections.
Steps to add either new training or a new category to a User's Researcher Profile	Researcher Profile Workspace	1. Navigate to **User's** Researcher Profile Workspace. 2. Select activity **"Update Safety Training Data"**. 3. Confirm **"Safety Training Participant"** checkbox is checked. To add a new **Course** Under **"Safety Training Course Records"**: 1) Select **"Add"**. 2) In the **"Training Course"** field, begin typing the course name or use the **"Select"** button to choose from the list. 3) Enter the **"Completion" Date"**. Select **"OK"** at bottom of pop up. 4) Select **"OK"** again (at bottom of pop up). 5) Confirm the related **Category** is checked. To track a new **Category** under **"Safety Training Categories to be Tracked"**: 1) Put a check in the checkbox next to the category to be tracked. 2) Select **"OK"** at bottom of pop up.