

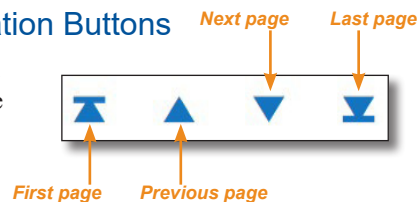
The CTMS has been upgraded to version 4.1.1. This bulletin summarizes the key features and enhancements in this software release.

## New Look & Feel

While much of the CTMS functionality is the same, you'll notice some updates to the look and feel of the tool.

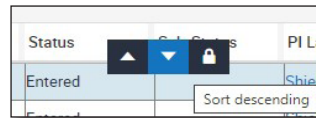
### Improved List Navigation Buttons

Those buttons at the bottom of every list now behave the way you want them to!



### Sorting Feature Improved

When working with a list, you now have the option to choose *ascending* or *descending* when you click a column heading.



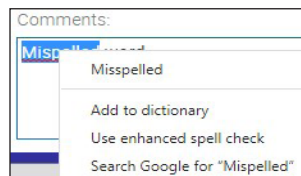
### Auto-Sized Sections

Each section of the CTMS now automatically sizes to fit the number of records available (with a maximum of 10 records per screen before requiring the use the navigation buttons).

Key Personnel	Role	Last Name
<input checked="" type="checkbox"/>	Study Coordina...	Adams
	Principal Invest...	Jacinto

### Spell Check Now Handled by Browser

All of the **Check Spelling** buttons were removed, since the spell check is now handled by the browser you are using.



### Increased Character Limits for Some Comments

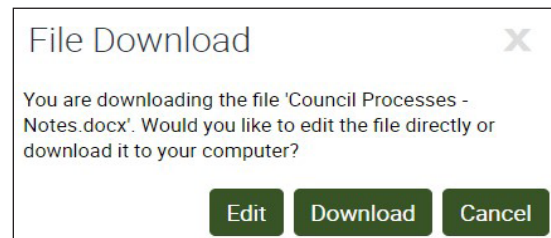
The character limit has been *increased to 4,000* for the following fields:

- Issue Log's **Description** and **Resolution/Action Comments** fields
- The Site's **Status History Comments** and **Milestone Comments** fields

## Edit Attachments without Using Save As

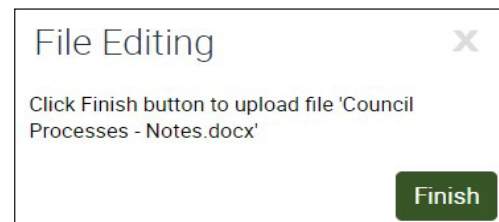
The ability to work with attachments has improved! Now, you can open an attachment from within the CTMS, edit it, and click **Save** to save it back to the CTMS (you no longer need to save it outside the CTMS and import it back in).

- 1 From an **Attachments** tab (i.e., on the **Protocols**, **Site**, or **Trip Report** tab), click an attachment link to open the file. The **File Download** message appears



- 2 Click **Edit** to open the file in its native application.
- 3 Edit the document and then click **Save**.
- 4 Close the application.

The **File Editing** message appears



- 5 Click **Finish**.

The updated file replaces the original file on the **Attachments** tab.

## New Site Contact "Key Personnel" Option

The new **Key Personnel** check box is available to add to the **Site Contact** view.


Key Personnel	Role	Last Name	First Name
<input checked="" type="checkbox"/>	Study Coordina...	Adams	Cynthia
	Principal Invest...	Jacinto	Marcia

- 1 From a **Site** record, click the **Site Contact** view tab.
- 2 Click the button, and then **Columns Displayed**.
- 3 Add **Key Personnel** to the **Selected Columns** list, move it up/down to the desired location, and then click **Save**.

The **Demographics** report will include a new column labeled "Key Personnel" showing values of Y/N.

## New Trip Report Functionality

### Actual Dates Required for *Submitted* Status

Actual Visit Start:	1/22/2021	
Actual Visit Completion:	1/22/2021	

A Trip Report won't be able to be *Submitted* until the **Actual Visit Start** and **Actual Visit Completion** dates are both filled in.

### Attachments Locked when *Sent to Sponsor*

Once the Trip Report **Status** is set to *Sent To Sponsor*, attachments can no longer be renamed, added, or deleted. If you need to rename, add, or delete an attachment, you must submit a CTMS Request Form (available on the CTMS Learning Center).

### New "QC Date" Field for Site Documents


A Site's **Documents** view tab now contains a **QC Date** field, allowing you to record the date that the document was verified in the eTMF.

This new field has also been added to the **Document Tracking Report**.

### New "Tier" Field for Issue Log Records

On the Site record's **Issue Log** view tab, use the new **Tier** field to indicate a level of escalation (values include 1, 2, and 3).

To add this field to your records:

- 1 From a **Site** record, click the **Issue Log** view tab.
- 2 Click the  button, and then **Columns Displayed**.
- 3 Add **Tier** to the **Selected Columns** list, move it up/down to the desired location, and then click **Save**.

Tier
1
2
3

## Getting Help

CTMS documentation, additional training and resources can be found on the **CTMS Learning Center** (<https://dcric.org/ctms-learning-center/>).

If you have additional questions or issues that you would like to discuss with CTMS support representatives, please email your requests to the **DHTS Service Desk** ([helpdesk1@dm.duke.edu](mailto:helpdesk1@dm.duke.edu)).

### New Way to Submit a CTMS Request

Beginning in February 2021, you can submit a **CTMS Request** through **Duke's Service Now** tool.

- 1 Go to <https://duke.service-now.com/>
- 2 Search for "CTMS"
- 3 Click **Request for CTMS**
- 4 Complete the form and click **Request Now**