

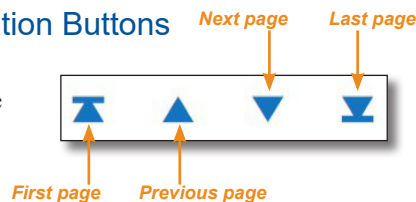
The CTMS has been upgraded to version 4.1.1. This bulletin summarizes the key features and enhancements in this software release.

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.

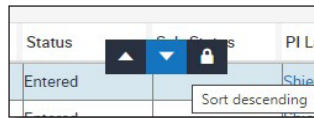
Improved List Navigation Buttons

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.



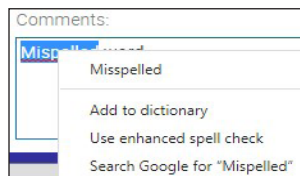
Auto-Sized Sections

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

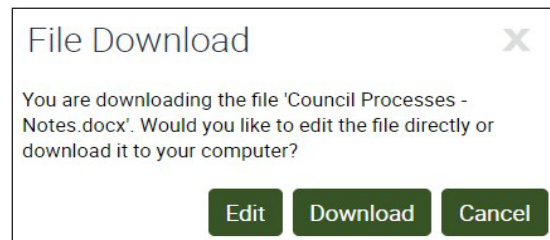
The character limit has been *increased to 4,000* for the following fields:

- 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

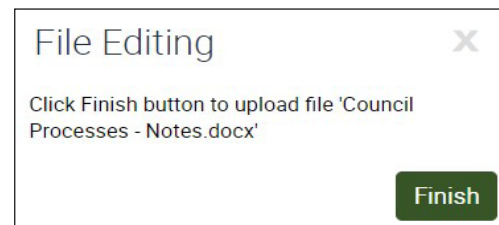
The ability to work with attachments has improved! Now, you can open an attachment from within the CTMS, edit it, and click **Save** to save it back to the CTMS (you no longer need to save it outside the CTMS and import it back in).

- 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).

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**