






# How to revise an existing Study Document

Note: You need to be in a submission form such as an Initial Review Submission Form, a Change Request & Amendments Form, or a Review Response Submission Form to revise an existing study document.

Also, please do not upload zip files or any files that the IRB will not be able to open without a special software.

Note: If you want to modify an existing document, do not add it as a new document. Instead, make a revision of the existing document .

 Select or Revise Existing		 Add a New Document		 Add Multiple Documents			
Detach		Title	Category	Expiration Date	Review Outcome	Checked Out	View Document
	1.0	Study Grant	Grant				 1.20 MB

If you haven't already done so, click on the "Select or Revise Existing" button to open the "Select Existing or Create Revised Study Document" popup.

The “Select Existing or Create Revised Study Document” popup will open.

Select	Show all Versions	Edit	Delete	Version	Version Date	Title/Category	Expiration Date	Review Outcome	Checked Out By	View Document	Create Revision
				1.0	01/14/2014	Study Grant Grant				 1.20 MB	

**Note:** Do not delete a document that was attached in a previous submission, it will be deleted from the whole protocol. If a document is no longer needed, ask the IRB to void it for you instead.

This is the existing document that we want to modify.

Click on “Create Revision” icon

The "Study Document Revision" popup will open.

**Study Document Revision:**

**\*Document Title:** Study Grant

**Version Number:** 1 .1

**Version Date:** 01/14/2014

**Category:** Grant

**Description:**

**Check-out the Document to your workstation for editing:**

**Comments:**

The system will increment the version number by + .1

1- Change the Version date to current date

2- Click on "Check-out Document" to download the document for modification.

Select or Revise Existing

Detach	Version	
	1.0	Study G

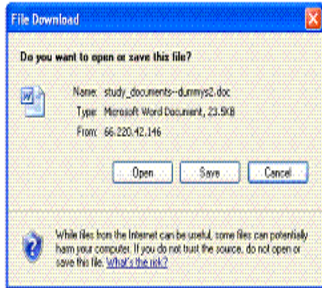
View Document
1.20 MB

## Download the Study Document

Back

Depending on your web browser, you will get the popup below, with the instructions in the background.

**Step 2:** At any moments, your browser will prompt you to either **Open** or **Save** the file (see example below). Note: this is not an actual File Download box, it is only a picture. In order to Check-out the document and edit it, you will need to **Save** the document to your workstation.

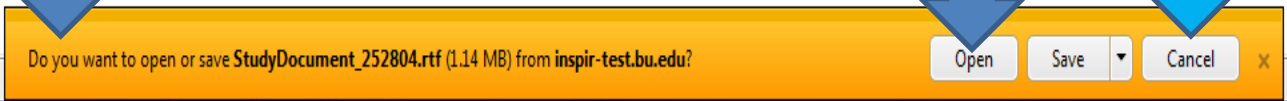


If you already have the modified document ready on your desktop, click on "Cancel".

To do so, click **Save**. This will open up a window similar to the one shown below that allows you to choose where in your workstation you would like to save the document. Once you have selected where you will save the document, click **Save**. After this, the Download Complete box will appear as shown below. From here you can choose to open the document to edit it, open the folder that contains the document, or Close the Download Complete box to edit the document later.

Click on "Open" to download and open a copy of the document for modification. Make sure you save it on your desktop

**Step 3:** VERY IMPORTANT that after you've saved the file to your workstation, click the **Complete Checkout** button in iRIS. Then click **Save** into iRIS once you've finished editing it. To cancel the document Check-out, click **Cancel**. Note: If you click **Cancel** on your computer, however you will simply lose the opportunity to edit the document.

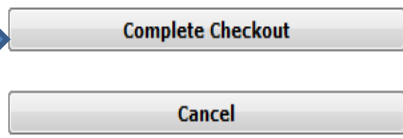


Whether you downloaded the document for revision or canceled the download because you already have this document ready, you will still need to come back to this page and click on "Complete Checkout"

Simply click on the bar and a small drop down list will appear. Click **Download File** from the list of options.



Click on "Complete Checkout". Don't forget to click this button to indicate that you have the document, and for the system to allow you to check it in (upload it) later.




To do so, click **Save**. This will open up a window similar to the one shown below that allows you to choose where in your workstation you would like to save the document.

Once you've selected where you will save the document, click **Save**. After this, the Download Complete box will appear as shown below. From here you can choose to open the document to edit it, open the folder that contains the document, or Close the Download Complete box to edit the document later.

**Step 3:** IT IS VERY IMPORTANT that after you've saved the file to your workstation and closed the Download Complete box that you click the **Complete Checkout** button in iRIS. This allows you to check the document (or upload the document) back into iRIS once you've finished editing it.  
To cancel the Document Check-out, click **Cancel**. Note: If you've already saved the file to your computer, the file will remain in your computer, however you will simply lose the option of checking the document back in.

At this point you should have opened the document from your Desktop (or wherever you saved it), and made your changes. Once you have finished modifying the document and it is saved, you come back to this screen to upload it


Select or Revise Existing

Detach	Version	Title
	1.0	Study Grant

Save Document

**\*Document Title:** Study Grant

**Version Number:** 1 .1

**Version Date:** 01/14/2014 

**Category:** Grant

**Description:**

This document is currently checked out by. **Khaled Khattar at 01/14/2014**


Check-in when you are done editing upload the document back into iRIS.


Revert to the document stored in iRIS.

Check-in Document...

Undo Check-out Document...

Click on "Check-in Document" to upload the modified document.


 **Select or Revise Existing**

Detach	Version	
	1.0	Study Grant

**Document Location:**

**Instruction:** Uploading a document into iRIS™ requires locating the document on the computer. Once you have located the document click on the 'Save selected file' button. The buttons will become disabled. If the document is a large document the window will stay in place until the upload operation has completed.


**View Document**

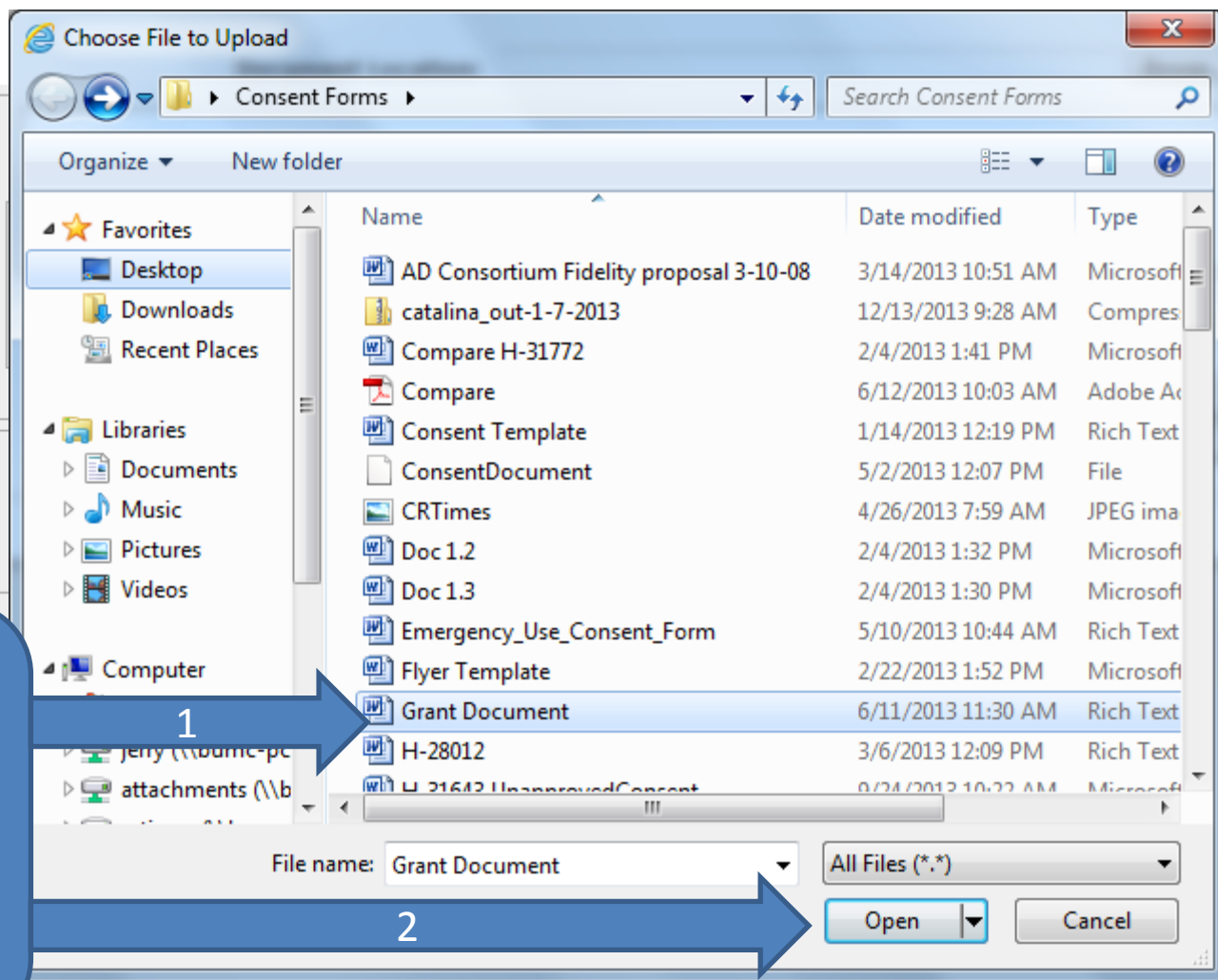
  
1.20 MB

Click on "Browse" to browse your PC for the document.




Select or Revise Existing

Detach	Version	
	1.0	Study Grant



View Document


1.20 MB

Navigate to the document that you have revised :

- 1- Click on the document to highlight it
- 2- Click on "Open"

The previous popup will close and the document location will appear here.

Path: C:\Users\kkhattar\Desktop\Consent Forms\Grant Document.rtf

Uploading a document into iRIS™ requires locating the document on the computer. Once selected the document click on the 'Save selected file' button. The buttons will become disabled. If the document is a large document the window will stay in place until the upload operation has completed.

Detach	Version	
	1.0	Study G

View Document	
	1.20 MB

Click on "Save selected file"

The "Study Document Revision" popup will reopen.

**Study Document Revision:** [X]

[Save Document]

**\*Document Title:** Study Grant

**Version Number:** 1 .1

**Version Date:** 01/14/2014

**Category:** Grant

**Description:**

**Check-out the Document to your workstation for editing:** [Check-out Document...]

**Comments:**

Select or Revise Existing

Detach	Version	
[X]	1.0	Study G

View Document
[View Document Icon]
1.20 MB

Make sure you have changed the date to current date

When you're done, click on "Save Document" to save it.

You can verify that you uploaded the right file by clicking on the document icon

Select Existing or Create Revised Study Document

1 result(s) found...

Select	Show all Versions	Edit	Delete	Version	Version Date	Title/Category	Expiration Date	Review Outcome	Checked Out By	Document	Created	Revised
				1.1	01/14/2014	Study Grant				1.20 MB		

Detach

1.1



The new document had been uploaded (note the version number 1.1)

When you're done, click on "X" to exit this popup.

You will be brought back to where you started

In few cases, you might need to detach a document (remove link or association) from the current submission. To do so, click on the "X" icon.

The uploaded document should appear here

Select or Revise Existing		+ Add a New Document		++ Add Multiple Documents			
Detach	Version	Title	Category	Expiration Date	Review Outcome	Checked Out	View Document
	1.1	Study Grant	Grant				 1.20 MB

The new document had been uploaded (note the version number 1.1)