The Center for Translational Medicine at UT Southwestern Medical Center

The Research Launchpad: Your One-Stop Shop to CTSA Resources and Services

Users Guide

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Introduction

The Research Launchpad is your one-stop shop for clinical and translational research resources and services at UT Southwestern Medical Center. As an interactive, web-based resource management tool, the Research Launchpad allows users and service providers to manage the status of service requests in real-time. The Research Launchpad was created (and is maintained) by the Center for Translational Medicine (CTM), home of the Clinical and Translational Science Award (CTSA) at UT Southwestern. Anyone seeking access to the Research Launchpad may login using their UT Southwestern username and password; profiles are automatically created for each user (contact the Research Launchpad administrator if you do not have UT Southwestern login credentials). General users (study staff seeking access to CTM resources and services) automatically have access to the functionality they need; service providers will be designated as a general user until a Research Launchpad administrator changes their authority level. Service providers seeking authentication in Research Launchpad should first login to automatically create a general user profile, and then contact a Research Launchpad administrator to receive designation as a service provider (see user-specific instructions below). Through utilization of the Research Launchpad, CTM administrators aim to improve accessibility to clinical and translational research resources and services for the UT Southwestern community: thereby increasing the throughput and efficacy of clinical and translational science across the spectrum of research.

Where to Find the Research Launchpad

The Research Launchpad is accessible online through the CTM’s main webpage; navigate your browser to http://www.utsouthwestern.edu/research/translational-medicine/index.html and select the button “Request for Consultation” to access the program. Alternatively, you can navigate directly to the Research Launchpad at https://ais.swmed.edu/ctsa.
General Users

a. Creating a Profile

Creating a general user profile in the Research Launchpad is easy. Simply navigate your browser to the login screen above, enter your UT Southwestern username and password, and click “submit”; you will be brought directly to your main dashboard.

Figure 1. Login Screen

b. Viewing and Using your Dashboard

Once you login, you will see a main dashboard displaying all requests you have entered into the system. The dashboard allows you to sort your requests by status (initiated, submitted, processing, completed, canceled) or service type (1 of 10 categories designated by the CTM); simply select your criteria and click “search” to see a new display of categorized requests. Your dashboard lists requests by ID, Request Status, Request Service Type, Investigator Name, Project Title, Created By, Create Date, and Submit Date: use each of these columns to learn more about each request. Your name should be present for all requests in the “Created By” column; this field allows service providers to see who sent them each request, and when.
To the far left of each request, you will see two icons: a magnifying glass and a trash can. The magnifying glass allows users to view further detail about each request, and edit these details if the request has not been completed or canceled; the trash can allows users to directly cancel their request. Click on the magnifying glass for a request with the following statuses to view or edit the request – Initiated, Submitted, or Processing. Click on the magnifying glass for a request with the following statuses to view...
details about these requests – Completed or Canceled. Regardless of status, all requests are available for print or for email to a peer/coworker. **Use caution** when canceling a request; once a request is canceled, it cannot be reactivated. Using the trashcan icon on your main dashboard to cancel requests will display a pop-up box first, to make sure you are ready to cancel (see figure 6).

Figure 4. View or Edit Request – Initiated, Submitted, or Processing
**Figure 5. View Request – Completed or Canceled**
c. **Viewing Requests by Status or Service Type**

When you accumulate a long list of requests in your main dashboard, it is often easier to sort them by status or service type to quickly find the request you’re looking for. Two options allow you to narrow your search: the “Request Status” drop-down menu and the “Service Type” drop-down menu. In “Request Status”, you may choose between Initiated, Submitted, Processing, Completed, or Canceled requests. In “Service Type”, you may display requests for 1 of the 10 service areas. Of course, you can choose both a request status and service type to further narrow your search. Once you have designated your criteria, click “Search” to view a list of valid requests on your dashboard.
Figure 7. Search Requests by Status and Service Type (here - “Initiated” and “Biomedical Informatics”)
d. **New Requests**

To initiate a new request, simply click the “New Request” button on the top-left corner of the main dashboard.

![Image of Center for Translational Medicine](image)

**Figure 8. New Request**

You will be taken to a screen called “Create Request First Step: Investigator Information”. This screen allows you to search for your project’s Principal Investigator (PI) by last and first name. If you are the PI, enter your name. If you are study staff, enter your PI’s name. Upon clicking “Search”, PI Information will be pulled from both the UT Southwestern HR database and the CTSA database. If information appears from both sources, choose the option from the **CTSA Investigator List**. If information does not appear from either source, you may select “Create New Investigator” to save your PI’s information to the CTSA database. When you have selected your option, click “Continue.”
Create Request First Step: Investigator Information

*Investigator information is from CTSA and Human Resources databases. Choose from CTSA Investigator List if available. Create a new investigator if no search results appear.

Search Investigator By Name

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<th>Degree</th>
<th>Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brown</td>
<td>Kathynn</td>
<td>PhD</td>
<td>UT Southwestern Medical Center at Dallas Other</td>
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<tr>
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<td>MD</td>
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<td>S</td>
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<td>T</td>
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<td>Hubert</td>
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<td>VA Medical Center</td>
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<td>J</td>
<td>M.D.</td>
<td>Pediatrics</td>
<td></td>
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</table>

Create New Investigator

Figure 9. Investigator Information from CTSA and HR Databases
If you select an investigator from the CTSA or UT Southwestern HR databases, you will be directed to a screen to verify the investigator’s information: if correct, click “continue”. If not correct, contact the Research Launchpad administrator. If you create a new investigator, you will be taken to a screen to input all information yourself. You only need to complete this step once per new investigator; once saved, this investigator’s information will be stored in the CTSA database. Click “Continue” to move forward or “Save New Investigator for later use” to exit the program.
Figure 11. Verify Existing Investigator Information

<table>
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<tr>
<td>Last Name:</td>
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<tr>
<td>First Name:</td>
<td>Arlene</td>
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<tr>
<td>Middle Name:</td>
<td></td>
</tr>
<tr>
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<td></td>
</tr>
<tr>
<td>Employee Id:</td>
<td></td>
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<tr>
<td>NIH eRA Commons Id:</td>
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<tr>
<td>Specialty:</td>
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</tr>
<tr>
<td>Email Address:</td>
<td><a href="mailto:aranmerhea@utsouthwestern.edu">aranmerhea@utsouthwestern.edu</a></td>
</tr>
<tr>
<td>Phone Number:</td>
<td>214-682-1223</td>
</tr>
</tbody>
</table>
Next, you will see a screen called “Second Step: Project Information.” This screen allows you to search for pre-existing research projects/studies associated with your PI in the CTSA database and the eIRB database. If a project is found, its information will display on the page. If a project is not found, you must submit project information to the CTSA database by selecting “Create New Project” and clicking “Continue.”
Figure 13. Create New Project

Figure 14. Project Information from eIRB system search
If you select an existing project, you will be taken to a screen to verify the project’s information, including performance sites, funding classification, and stage of project. If the project information is from eIRB, you will also see the IRB number and IRB Title. Once you edit, verify, or add new project information, click “Continue” to move forward or “Save new project for later use” to exit the request. If the project is new, you will need to fill in all project information yourself. You only need to complete this step once per new project; once saved, this information will be stored in the CTSA database. Click “Continue” to move forward or “Save new project for later use” to exit the program.

Figure 15. Verify Existing Project Information (from eIRB)
The next screen will allow you to enter your specific resource or service request, attach any related files, agree to the CTM attestation, and submit your request. This step is the same for all Principal Investigator and Project types, regardless of whether they are new or pre-existing. First, choose 1 of 10 service types to categorize your request. Then, select your role in the project (Principal Investigator, Sub-Investigator, Study Coordinator, Research Nurse, Administrative Contact, Other). Finally, enter specific details about your request in the “Notes” field. Information in “Notes” will be used by the service provider to best determine who should work on your request. If you have any pertinent files you’d like the service provider to receive immediately (contracts, study brochures, protocols, reciprocity agreements, small data sets, etc.), you may attach them to the request. Finally, before submitting, the Research Launchpad requires all investigators to agree to cite the CTSA grant in any publication, presentation, poster, or pilot funding project that utilizes our support. You will find the grant number in the Attestation, and it is also available on the CTM main website. When you are ready to submit, click “I agree” below the Attestation, and then click “Save/Submit.” Your request will immediately be routed to the appropriate service provider.
Figure 17. Confirm and Submit Screen (split view of full screen)
Once you are routed back to your main dashboard, congratulations! You are done. A service provider has automatically received your request via UT Southwestern Outlook, and will be in touch with you as soon as possible. For requests that have not been answered in (5) business days, please contact the Research Launchpad administrator for assistance. Refrain from resubmitting identical requests, as this will only confuse your service provider and will not speed up the process.

e. **Editing Requests**

Once you have submitted a request, it is possible to change information previously entered, providing the request has not been completed or canceled. Once a request is completed or canceled, no further action can be taken, except printing or emailing request details. In order to edit a request from the main dashboard, click the magnifying glass icon to the far left of the request to be taken to a page called “Review Request Details”. On this page, you will see a button labeled “Edit Request”; clicking this button will allow you to edit the service type or notes, the Principal Investigator, and the Project. Be aware that it is possible to change the entire nature of your request, from service type to principal investigator to project, which may require collaboration with another service area, rendering your original request null; use edit sparingly, to account for changes like a PI transfer for a clinical research project, study staff turnover, misunderstandings related to the service type, etc. If your request will change drastically, it is preferable to submit an entirely new request and cancel the previous one.

Figure 18. View and Edit Request from Main Dashboard
Figure 19. Review Request Details and Edit Request
Figure 20. Edit Request Page (split view of full screen)
f. **Canceling Requests**

You may cancel an active (status of Initiated, Submitted, or Processing) request one of two ways. The easiest way is to click the trashcan icon to the far left of the request on your main dashboard; this action will immediately change the status of the related request to “Canceled” (see Figure 6, reprinted below). Another option is to click the magnifying glass to view the request, and then click “Cancel Request” at the top of the page. This second option requires an extra step, but can be helpful if you want to review request details before making the decision to cancel.

![Canceling a Request – Trashcan Icon](image-url)

*Figure 6. Canceling a Request – Trashcan Icon*
g. **Getting Help**

Getting help with your Research Launchpad request is easy; simply contact the current administrator by clicking the “Contact Us” button at the top right of every screen. Once you navigate to this screen, you will see a phone number, email address, and the link to our main CTM website should you want to do further research on your own. Any questions you have can be answered by contacting the administrator or searching our website.
Service Providers

a. Creating a Profile

Creating a service provider profile in the Research Launchpad first requires creation of a general user profile. Simply navigate your browser to the login screen, enter your UT Southwestern username and password, and click “submit”; you will be brought directly to your main dashboard and a profile has now been created. Once this step is complete, contact the Research Launchpad administrator to request service provider authority (be sure to include which service area you will be associated with).

b. Viewing and Using your Dashboard

Once you login, you will see a main dashboard displaying all requests that have been entered under your service area. The dashboard allows you to sort these requests by status (submitted, processing, completed, canceled) or service type (depending on your CTM affiliation, you may be sourced to one or more of these service areas); simply select your criteria and click “search” to see a new display of categorized requests. Your dashboard lists requests by ID, Request Status, Request Service Type, Investigator Name, Project Title, Created By, Create Date, and Submit Date: use each of these columns to learn more about each request. To determine who initiated each request, identify the user in the “Created By” column; this person will be your main contact. When you begin processing the request, you will need to get in touch with this general user to request details and move the project forward.
To the far left of each request, you will see two icons: a magnifying glass and a trash can. The magnifying glass allows you to view further detail about each request, change the status to reflect stage of work, and enter service log notes; the trash can allows you to directly cancel the request. Click on the magnifying glass for requests with a status of “Submitted” or “Processing” to view details, enter service notes, or change the status. Click on the magnifying glass for a request with the status of “Completed” or “Canceled” to view details only. Regardless of status, all requests are available for print or for email to a peer/coworker. If you see a trashcan icon
next to a request, use caution; once a request is canceled, it cannot be reactivated. Only cancel a request as a service provider if the user is no longer affiliated with UT Southwestern, the user cannot access Launchpad and you are processing the request for them, the user refuses to cancel a request in Launchpad that you are no longer working on, or another situation with no alternative. Using the trashcan icon on your main dashboard to cancel requests will display a pop-up box first, to make sure you are ready to cancel (see figure 6).

**Research Launchpad (CTSA)**

![Image of a table showing request details](image)

- **Request Service Type:** Biomedical Informatics
- **Requester Name:** Ariane Elisabeth Rhea
- **Notes from Ariane Rhea:** Testing functionality of biomedical informatics service request. Testing again - add to new rich-text editor to confirm security issue fix.

**Request File Attachments**

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<th>Uploaded Date</th>
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<td>11748</td>
<td>Ariane Rhea</td>
<td>10/8/13</td>
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</table>

**Investigator Details**

<table>
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<tr>
<th>Investigator Name:</th>
<th>Ariane Rhea</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender:</td>
<td>Female</td>
</tr>
<tr>
<td>Phone Number:</td>
<td>2146462123</td>
</tr>
<tr>
<td>Institutional Affiliation:</td>
<td>UT Southwestern Medical Center at Dallas</td>
</tr>
</tbody>
</table>

**Degree:**

- MPH
- White
- ariane.rhea@utsouthwestern.edu
- Epidemiology

**Primary Area of Expertise/ Specialty:**

- Non-Academic Staff
- Non-Hispanic

**Project Information**

- **Title of Project:** Testing Functionality of Bioinformatics Service Group - Mock BMI Study
- **Stage of Project:** Data collection is in progress
- **Is Project funded?** Yes

**Name of Investigator:**

- Ariane Rhea
- Sub-Investigator

**Performance Sites:**

- Parkland Health & Hospital System
- Corporate/Private Sector Industry (Contractual Agreement)

**Funding Source:**

- UT Southwestern

**Is this project UTSW IRB/IRBUC approved?** Yes

Figure 23. View or Work on Request –Submitted or Processing
Figure 5. View Request – Completed or Canceled
As a service provider, you are responsible for changing the status of each request in your service area to indicate progress to the user/requestor. Once a request is submitted, the main contact for your service area will receive an email announcing the creation of the request. The main contact will then log in to Research Launchpad, view the request, and determine who on the team will process it. In some cases, there may only be one service provider to a function; in other cases, there may be a team of 5 or more. If the service request needs to be forwarded to someone without a Research Launchpad profile, the main contact can email request details to that person’s UT Southwestern inbox. In that situation, it is still the responsibility of the main contact to update progress on the request in Launchpad, requiring frequent communication with the external service provider to ensure request statuses and service logs are up-to-date. If an external service provider anticipates handling multiple requests for a CTM service area, s/he can request designation as a service provider in Launchpad (contact the Research Launchpad administrator for more information).

Once a service provider has been assigned to a request, s/he will log in to Research Launchpad, view request details through the main dashboard (click the magnifying glass), and determine whether the request can be processed as entered. If more information is required before processing, the service provider should contact the user and specify what information is needed. If all information required to begin is present, the service provider clicks the “Begin Processing” button near the top of the view screen. This action will automatically send an email to the user indicating the service provider has accepted the request. It is then the responsibility of the
service provider to contact the user and work on the request. Use the email function to contact the user, determine whether additional information is needed, set up meetings, and so forth. As major project milestones are met, the service provider must enter them in Launchpad using the “Add Service Log” button. The service log will capture date and time of any action; you may change these specifications to reflect when an action occurred. The Service Log will be used to measure time to completion for each request, so be sure all milestones are entered, complete and accurate, and reflect the appropriate timestamp.

Figure 24. Email - Service Request Submitted
Figure 25. Service Provider Dashboard to View Request

Figure 26. Service Provider Changes Status to Processing
Figure 27. Main Dashboard Shows Status Change
Figure 28. - Add Service Log to Track Milestones
Figure 29. Example Service Log Page
Figure 30. – Change Status from Processing to Complete
d. **Sending Requests to your Staff**

If you are a primary service provider, you will receive email notification of all requests for your service area. It is likely you will need to assign these requests to your staff members, depending on request type and availability. In order to assign requests in your service area, simply click the magnifying glass to the far left of the request to view it, click the “Email” button, enter the email address of the staff member you wish to assign this request, and click “Send.” The staff member will receive an email in their UT Southwestern inbox with the assignment. Keep in mind these emails only generate once per click; they do NOT automatically recur if the staff member does not log in and process the request. **It is up to the main contact service provider to make sure all requests are being worked on by the proper staff member.**

If a staff member would like to take responsibility of processing a request in the system and has not yet been assigned a Research Launchpad Service Provider authority, they will first
need to log in to the system for an automatic general user profile, and then email the Research Launchpad administrator to gain service provider status.

Figure 32. Email Button on Review Request Details Page
Figure 33. Example Email Request Detail Page in Launchpad
e. **Editing Requests**

It is possible for service providers to change information in a request submitted by a general user, if the status is Submitted or Processing. Once a request is Completed or Canceled, no further action can be taken, except printing or emailing request details. Service providers should refrain from editing requests unless completely necessary; the responsibility for editing request information falls on the general user. Situations where a service provider might need to edit a request would be when a service provider is logging a request for a user without Launchpad access, or when the user has left UT Southwestern. Editing should rarely, if ever, be done by the service provider. For further instructions on editing a request, see [Editing Requests](#) in the general user section.

**Be aware** – if a user edits their request, you will **not** receive an email that a change has been made. General users are instructed to avoid drastic changes to service requests and submit new requests for significant changes. **Any edits made to service requests should reflect discussions you have already had with the user.**

f. **Canceling Requests**

It is possible for service providers to cancel a request submitted by a general user, if the status is Submitted or Processing. Once a request is Completed or Canceled, no further action can be
taken, except printing or emailing request details. **Service providers should refrain from canceling requests unless completely necessary; the responsibility for canceling request information falls on the general user.** Situations where a service provider might need to cancel a request would be when a service provider is logging a request for a user without Launchpad access, or when the user has left UT Southwestern and no longer wishes to continue her/his request. Canceling should rarely, if ever, be done by the service provider. For further instructions on canceling a request, see **Canceling Requests** in the general user section.

If a request is cancelled under your function, you will receive an email similar to the one below.

---

**Attention: Research Launchpad Request 223 has been Cancelled (From Test)**

Ariannie Rhea  
**Sent:** Mon 08/19/2013 4:13 PM  
**To:** Ariannie.Rhea, Jaquilen Gu  
**Cc:** Ariannie Rhea  
**Retention Policy:** Mailbox 395 Day 1 year, 1 month  
**Expires:** 11/07/2014

Hello,

This message is to inform you that your service request (223) has been cancelled. For more details, please log in to your Research Launchpad profile (link below). If this request should not have been cancelled, or if you have any other questions, please contact Ariannie.Rhea@UTSouthwestern.edu.

[Research Launchpad](#)  
Thanks,

The Center for Translational Medicine

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*UT Southwestern Medical Center  
The future of medicine, today.*

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Figure 35. – Email: Request Cancelled

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**g. Getting Help**

Getting help with a Research Launchpad request is easy; simply contact the current administrator by clicking the “Contact Us” button at the top right of every screen. Once you navigate to this screen, you will see a phone number, email address, and the link to our main CTM website should you want to do further research on your own. Any questions you have can be answered by contacting the administrator or searching our website.
Figure 22. Getting Help – Contact Us Screen