Edge - Quick Start Guide

Setting up EDGE access

All new users of EDGE on our site will need to complete the EDGE registration form.

EDGE Registration Form		
To gain access to the research management system, EDGE, please complete the form below		
Personal Information		
Title		
Forename		
Surname		
Email Address (Work)		
Staff Role (Job Title)		
Study Role, e.g. PI, Research Nurse, Administrator...		
Contact End Date (Non Permanent Staff Only)		
Proof of Compliance		
Although it is the responsibility of each Delivery Team to retain wet signed copies of CV and GCP Certificates, we require you to attach a copy of these documents along with this form and provide the date of these documents below for our own audit purposes.		
CV Certificate	Issued/Signed Date :	
GCP Certificate	Issued/Signed Date :	
Study Access Requests		
By requesting accesss to studies here you are confirming that you have permission to seek access. If you are unsure if you have the right permission please speak with your manager or supervisory staff member.		
Please state study name/s and reference numbers (i.e. Local Project Reference Number or IRAS number)	Please initial below to confirm you have signed the delegation log for this study if this is required by your job-role.	
Please return completed forms to rch-tr.edge@nhs.net		

Personal Information

Will be entered into EDGE and will show on your profile. This makes it easier for other EDGE users to identify which staff are working on which studies.

Proof of Compliance

Is required by the EDGE team for their records so that they can grant you access.

Study Access Requests

This form is not the only way to request access to studies.

You can request access to a project at any time by emailing the EDGE account at rch-tr.edge@nhs.net.

If your job-role requires that you need to sign delegation logs , please also confirm in your email that you have signed the delegation log for that study. Most clinical staff will need to sign before access can be granted. Check with your team lead/ the admin team or with the EDGE data officer if you are unsure.

Activating your account

Once you have been added to EDGE as a user you will receive an email containing your username (usually your nhs.net email address) and an activation link.

New EDGE Account

Dear
A new account has been created for you on the EDGE system.

Your Username is: @nhs.net

To access EDGE you will need to authorize your account and create a password. Please click the link below to activate the account and set your new password.

https://www.edge.nhs.uk/#/authorise/eb47c4f0-c9b8-4e41-8450-40ba

The account activation link is only valid for a limited time. Please ensure you click on the link before 08 June 2023 (UTC).

If you miss the timeframe for authorisation, please contact your local Lead Administrators. Their details should be listed below.

After you follow the activation link in the first email, EDGE will automatically send you a second email containing a link to access EDGE.

Welcome to EDGE

Dear

Your EDGE user account has now been authorised.

You can login to the EDGE application at:
https://www.edge.nhs.uk/#/login

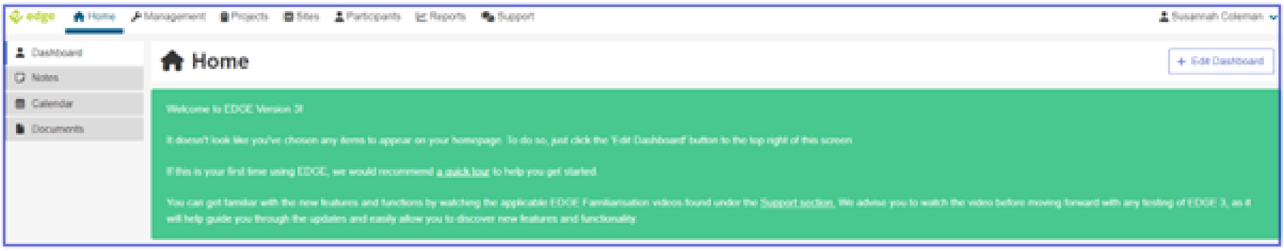
Please do not reply to this message as it is an automated system message. If you have any problems or queries, please contact your local administrator.

Name	Email address	Phone number
Gina Townley	gina.townley@nhs.net	
Abigail Weeks	abigail.weeks1@nhs.net	01872 256427

Your account is now set up.

Orientation

On the Home screen you can find the following tabs along the top of the screen:



Projects. To search for projects. See page 5

Participants. To search for or add participant data. See pages 6-7

Reports. To create and run reports from EDGE. See page 8.

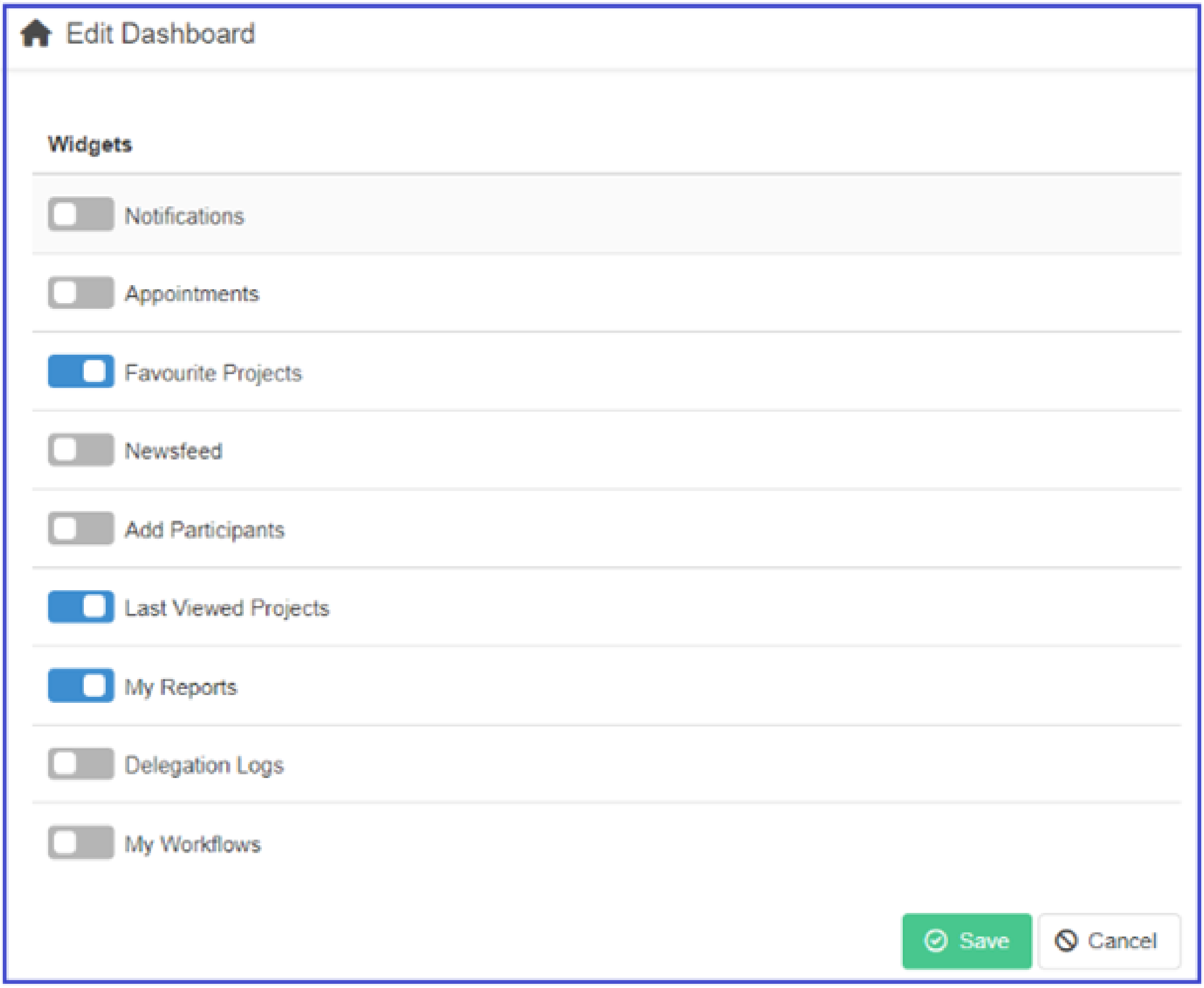
Support. For information about EDGE support. EDGE Support, includes detailed self-help guides in Knowledgebase.

My Profile. Click the dropdown arrow next to your name to change your password, complete your profile information or logout.

On the left of the screen you can see the following tab:

Documents. To find useful information including R&D essential documents, SOPs and work instructions.

From the home screen click the 'Edit Dashboard' button under your name to select widgets and personalise your home screen.



Organisational and Site Levels

Organisational (Green) Level

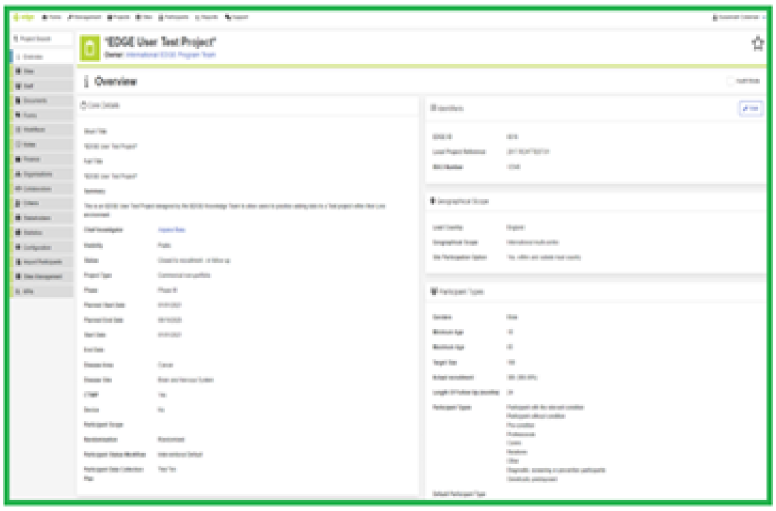
• Standard EDGE users do not edit information at the organisational level.

• Study information across all sites is shown.

• Data is entered and maintained mostly by the sponsor.

• RCHT Study Setup Team adds limited information here.

• Navigate to the Site (red) level by clicking ‘Sites’ on the tabs on the left, then selecting RCHT.



Site (Red) Level

• Add and maintain data relating to studies at our site.

• Data entered allows us to follow participant journeys, monitor recruitment and more.

• View depends on level of study access. For example, users without clinical access will not see the ‘Participants’ tab on the left.

• Contact the EDGE Team on rch-tr.edge@nhs.net to request a different level of access.

• Go back to the Organisational level by clicking ‘Sites’ in the top left, then ‘Overview’.

Projects

When searching for a project, select (on top left dropdown menu) from:

Assigned Projects – projects for which you are on the staff list

Organisation Projects – projects which have been assigned to your organisation

Global Projects – projects which are not necessarily assigned to you or your organisation.

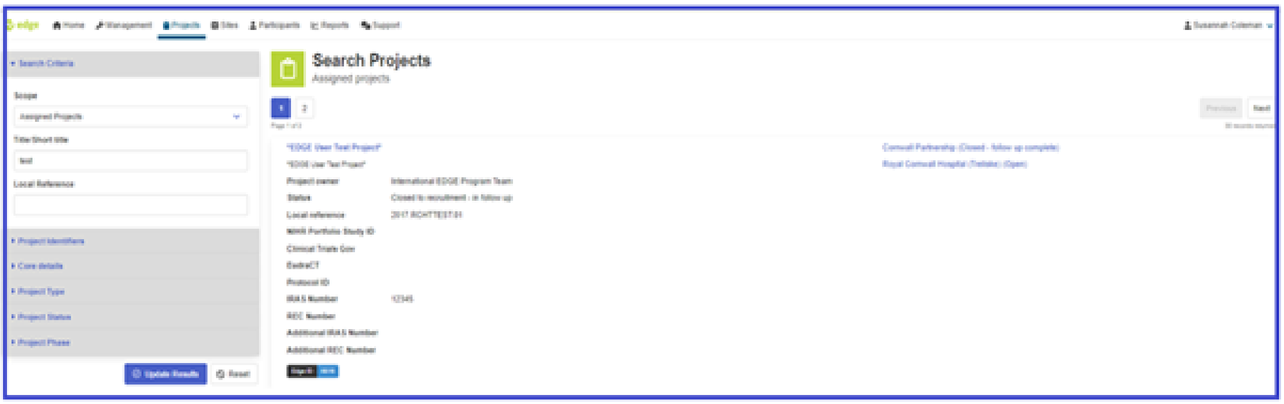
The default is Assigned Projects.

To find a project

• Select the relevant project type (as explained above)

• Search for your study using one of the search fields, such as Short Title, Local Project Reference Number, IRAS number etc.

• Study names often differ between systems, so it may be better to search by Local Project Reference, IRAS or NIHR ID than by name.



To open a project

When you have searched for a project, click on the title of the project to access study information on the Organisational (green) level of EDGE.

Click on ‘Royal Cornwall Hospital (Treliske)’ to access study information on the Site level of EDGE.

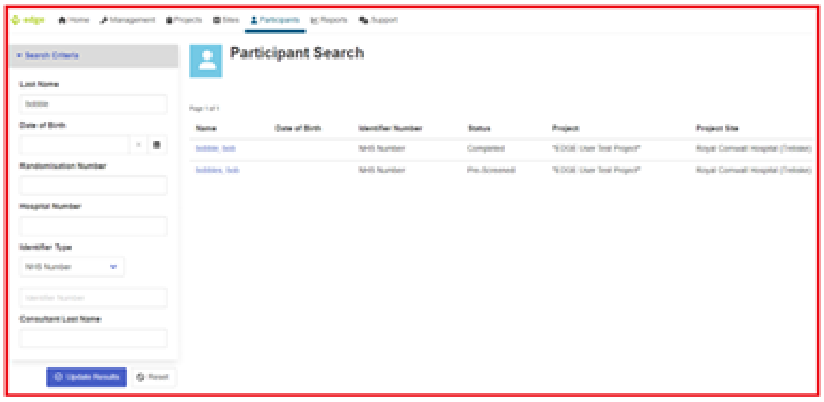
Participants

To search directly for a participant

• Select the ‘Participants’ tab at the top of your screen.

• Type the participant’s name or other identifier such as date of birth or hospital number.

• Click on the name of the participant to go to that participant’s data within a project.



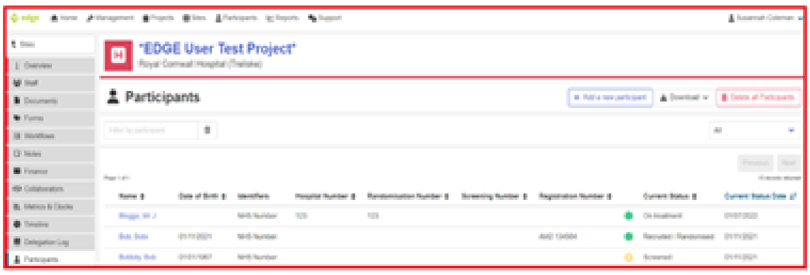
To search for participant data within a project

• Search for and open your project at Site (red) level.

• Open the ‘Participants’ tab on the left of the screen.

• Click on a participant’s name to access their information.

• Use the tabs now available on the left (appointments, forms, documents) to see more data relating to that participant.



Adding individual participants to a project

• Search for and open your project at Site (red) level.

• Open the ‘Participants’ tab on the left of the screen.

• Select ‘Add a new participant’.

• EDGE will display fields to enter participant data such as personal information, NHS number and GP details. These may vary between studies and may or may not be mandatory depending on the data required by the sponsor.

• Fill in the date and user fields as appropriate to show who pre-screened, approached, consented etc the participant, and on which dates.

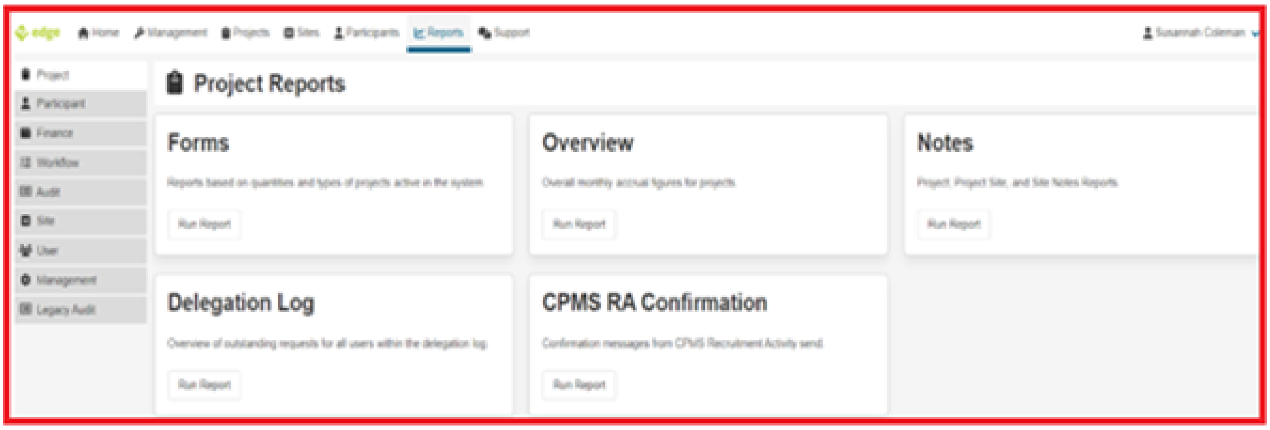
• For bulk participant uploads, see the Knowledgebase.

Participant Appointments

THIS PAGE TO BE COMPLETED

Reports

To run reports in EDGE you need to have a basic understanding of the information which is available in EDGE. For most users ‘Project Reports’ and ‘Participant Reports’ will be the most useful but see the Knowledgebase for further information.



Data available for reporting in EDGE often come from Forms or Fields and Workflows. If you are interested in building and running your own reports you could research how Forms and Workflows are created and applied to data.

Configuring EDGE

You are encouraged to try to use the features within EDGE yourself, but please be mindful that Forms, Fields, Workflows, pre-built reports and other saved elements within EDGE may be in use by another user or department. Please do not save over anything which is not yours, and if you create a new element then please save it with an appropriate name and attached information so that other users can see the purpose of what you have saved.

Your EDGE Data Officer rch-tr.edge@nhs.net may also be able to help you design reports for regular reporting (for example, a report which can be pulled periodically to monitor progress and performance.)

Further Information

Information and guidance on EDGE within RCHT:

The 'Support' button at the top of the screen in EDGE shows you your local administrators and their contact details.

Your local EDGE Data Officer will be able to help you with any queries or advise you of the best point of contact: rch-tr.edge@nhs.net or 01872 255136

General EDGE information and guidance

The EDGE website - EDGE Clinical Research

The EDGE support team at the following email address: edge@edge.soton.ac.uk