


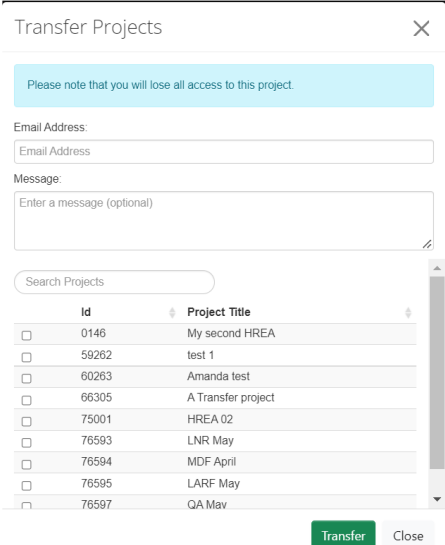
The ERM project owner (ERM user who created the project) can use the **Transfer** function to permanently transfer the project to another collaborator. This may be when a Sponsor creates a HREA application then transfers the project to the Coordinating Principal Investigator (CPI) or when the project owner intends to leave the project and transfers responsibilities to another collaborator in the research team.

If the current project owner cannot be contacted, a Victoria - Project Transfer Form is available on the Infonetica website Templates page to complete and email to Infonetica Helpdesk.

## Current project owner


### Steps

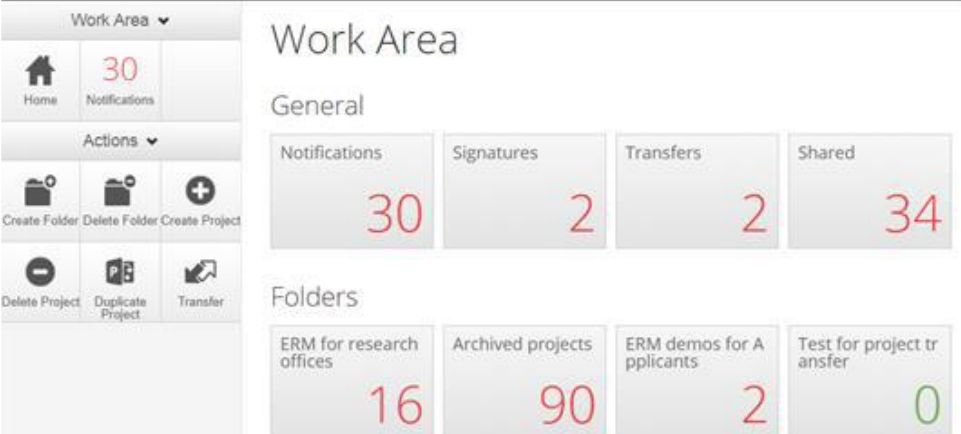
- From the Work Area, select the **Transfer**  button from the Actions pane
- A **Transfer Projects** text box is displayed
- Enter the ensuing project owner's ERM email address and select the relevant project from the list
- Select the Transfer button
- The new project owner will receive an email notification regarding the transfer of the project and to log into ERM



| Id                             | Project Title      |
|--------------------------------|--------------------|
| <input type="checkbox"/> 0146  | My second HREA     |
| <input type="checkbox"/> 59262 | test 1             |
| <input type="checkbox"/> 60263 | Amanda test        |
| <input type="checkbox"/> 66305 | A Transfer project |
| <input type="checkbox"/> 75001 | HREA 02            |
| <input type="checkbox"/> 76593 | LNR May            |
| <input type="checkbox"/> 76594 | MDF April          |
| <input type="checkbox"/> 76595 | LARF May           |
| <input type="checkbox"/> 76597 | QA Mav             |

## New project owner

- Log into ERM
- In the Work Area, select the Transfers tile
- A list of all transfers will be displayed
- In the relevant message line, select **View Project**  to open the project as read only



Work Area

Home 30 Notifications

Actions

Create Folder Delete Folder Create Project

Delete Project Duplicate Project Transfer

General

Notifications 30 Signatures 2 Transfers 2 Shared 34

Folders

ERM for research offices 16 Archived projects 90 ERM demos for Applicants 2 Test for project transfer 0

**To accept the transfer,** select the **Accept Transfer**



button from the Actions

Actions

**HREA 02** 75

Project Tree ▾

- HREA.02
  - HREA

| Action Required | Status        | Review Reference | Date Modified    | NMA                |
|-----------------|---------------|------------------|------------------|--------------------|
| Yes             | Not Submitted | N/A              | 02/04/2021 18:08 | Project is for NMA |

- An **Accept Transfer** text box is displayed
- Select Yes to accept the transfer
- Ownership of the project is transferred including all subforms e.g. SSAs and associated documents
- The new owner can access the project from their Work Area