CITI Training

CITI Training Administration

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Contents

What Is CITI?

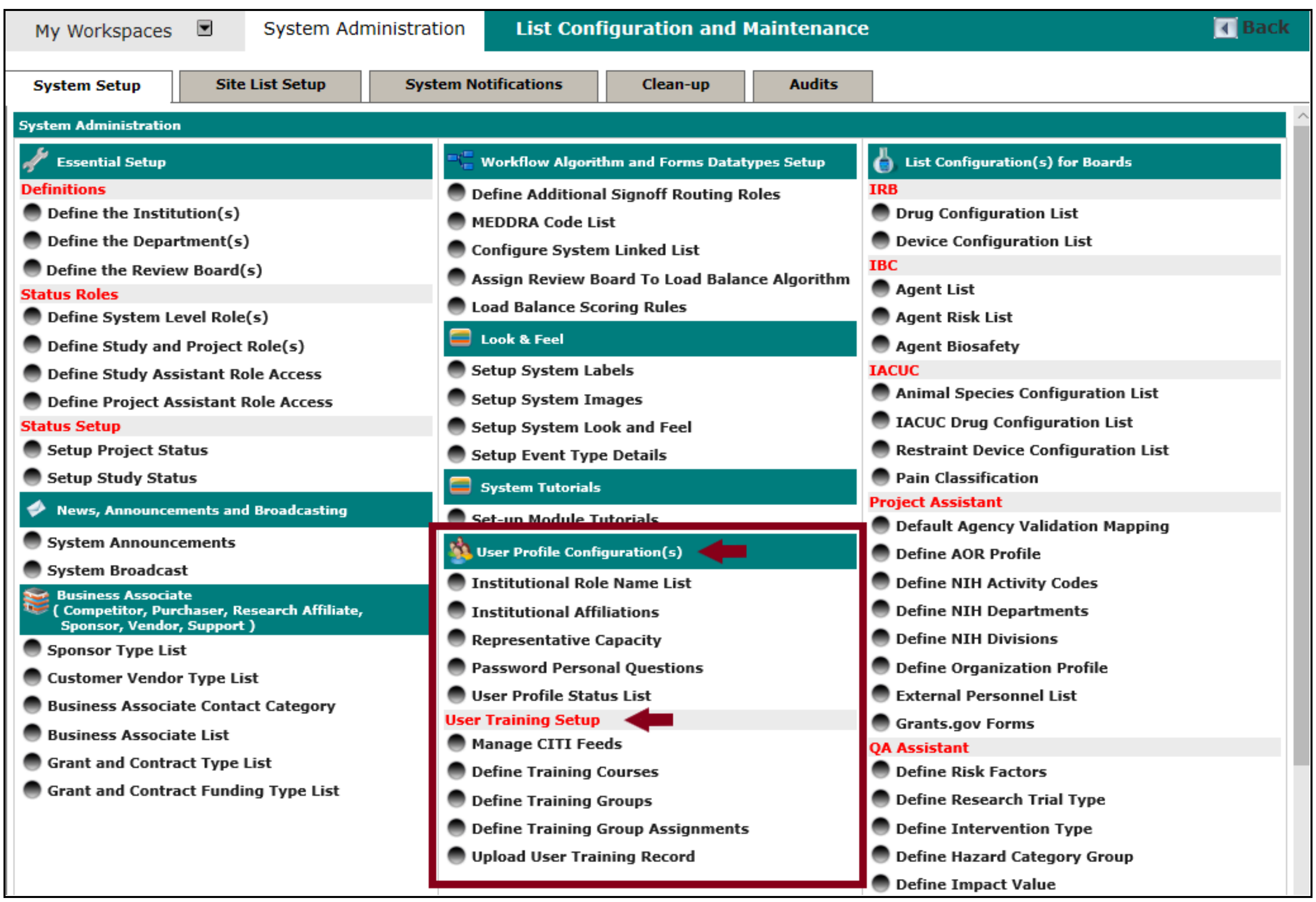
The Collaborative Institutional Training Initiative (CITI Program) is dedicated to promoting the public's trust in research by providing high quality, peer-reviewed, web-based educational courses in research, ethics, regulatory oversight, responsible conduct of research, research administration, and other topics pertinent to the interests of member organizations and individual learners. These courses are offered on a paid subscription basis, and many institutions rely on the CITI Program to meet the continuing education needs of their researchers and related staff.

For institutions that subscribe to the CITI Program, the iRIS™ system can provide access to CITI courses and tracking of user progress toward training goals and requirements.

User Training Setup

There is a **User Training Setup** section in the System Administration area of the **System Setup** tab in **List Configuration and Maintenance**. This section allows the System Administrator to configure CITI Feeds, Training Courses, Training Groups, and Training Group Assignments.

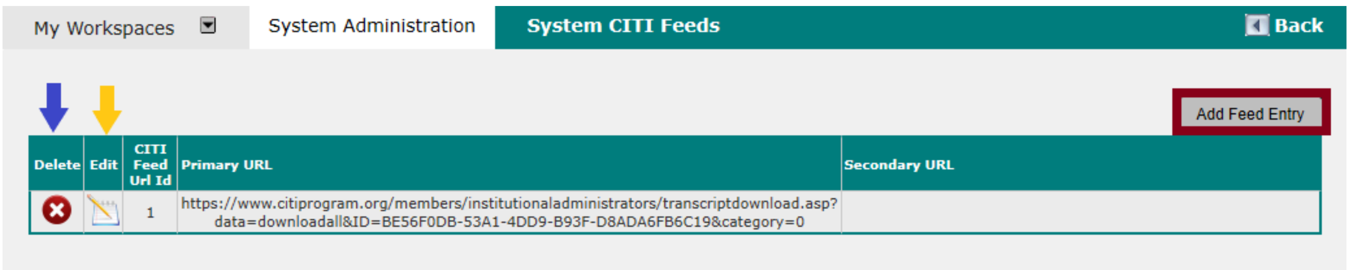
This page is accessed via My Workspaces > System Administration > List Configuration and Maintenance > [User Profile Configurations section] / User Training Setup subsection].



Configure Feeds

In this context, a "feed" is a regularly updated data repository that exists outside the iRIS™ system. CITI feeds contain data related to CITI training courses and users enrolled for CITI courses, and can be accessed by the iRIS™ system in order to bring CITI data into the system.

CITI feeds are listed in the **System CITI Feeds** page, which is accessed via System Administration > List Configuration and Maintenance > [User Profile Configurations section] / User Training Setup subsection] > Manage CITI Feeds.



Each feed includes updates to the CITI training course list and course registration/completion status for users in the iRIS™ system that is receiving the feed. Feeds can be set up to import when manually launched, according to a fixed schedule, or with both options available. These options are configured in System Administration settings.

Each feed record must include a **Primary URL**, but the **Secondary URL** is optional.

A **Primary URL** points to a feed with *all* CITI course records and *all* training records for *all* users currently registered for CITI training in the iRIS™ system that is receiving the feed.

A **Secondary URL** points to a feed that includes only those records that have updated since the last time the Primary feed ran. The Secondary feed contains fewer records and runs its update more quickly than a Primary feed, making this option useful for institutions with many users and many CITI courses.

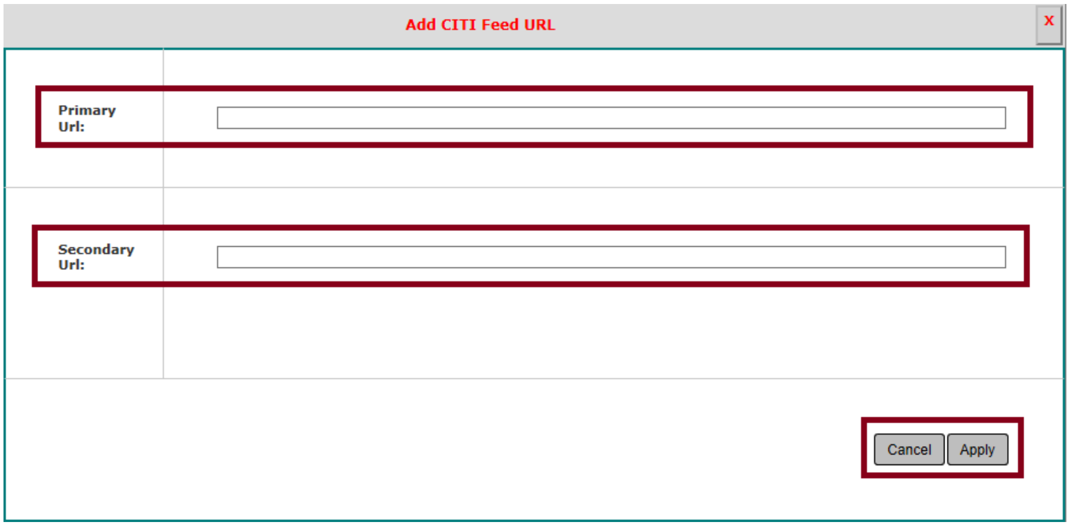
Click the icon in the **Delete** column (blue arrow) to delete an existing feed. Deleting a feed does not cancel the associated CITI subscription. If a feed is deleted in error, it can easily be added back into the system (see next section, Adding Feeds).

Click the icon in the **Edit** column (yellow arrow) to edit an existing feed. The only information that can be edited is the feed URL.

Click the **Add Feed Entry** button at the upper right to add a new feed.

Adding Feeds

Click the Add Feed Entry button in the System CITI Feeds page (previous screenshot) to open the **Add CITI Feed URL** popup dialog.



To add a Primary feed, enter its location in the **Primary URL** field and click the **Apply** button. To add a Secondary feed, enter its location in the **Secondary URL** field and click the **Apply** button.

The new feed is added to the list of feeds displayed on the System CITI Feeds page.

Click **Cancel** to close the popup without saving changes.

Deprecating Feeds

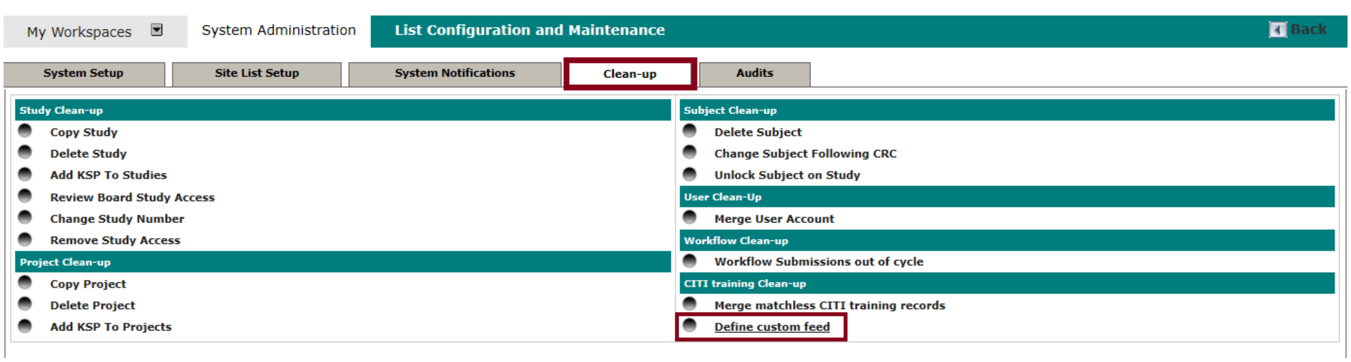
There is no separate page or function for deprecation of CITI feeds. To deprecate a feed shown on the System CITI Feeds page, either edit the feed or delete it and create a new feed to replace it.

Custom CITI Feed Configuration

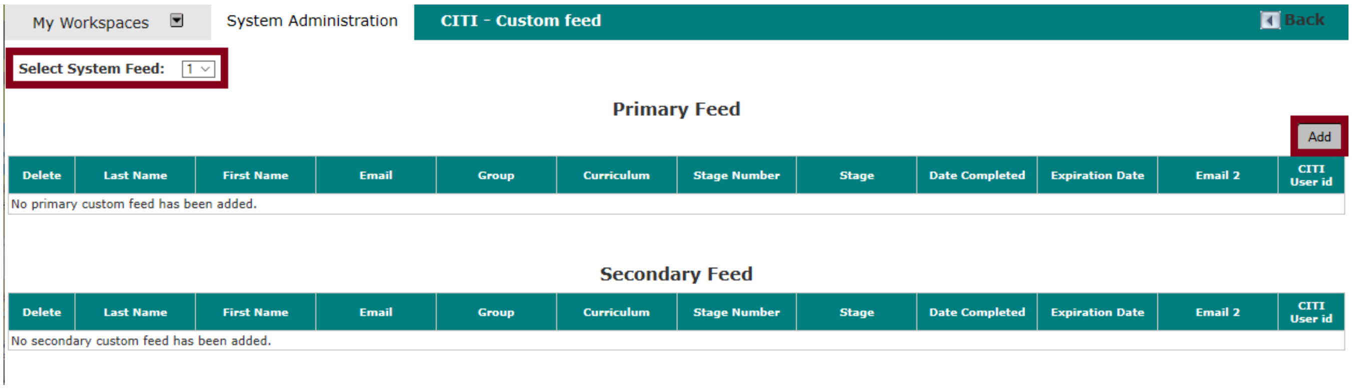
A CITI custom feed allows institutions to shift column contents in the feed during import to the iRIS™ system.

For example, if the first column in the CITI feed is the user's Last Name but the institution wants the user's Email Address to populate in the first column, this feature provides that capability.

To manage custom CITI feeds, navigate to System Administration > List Configuration and Maintenance > [Clean-up tab] > [CITI training Clean-up section] and click the **Define custom feed** link.



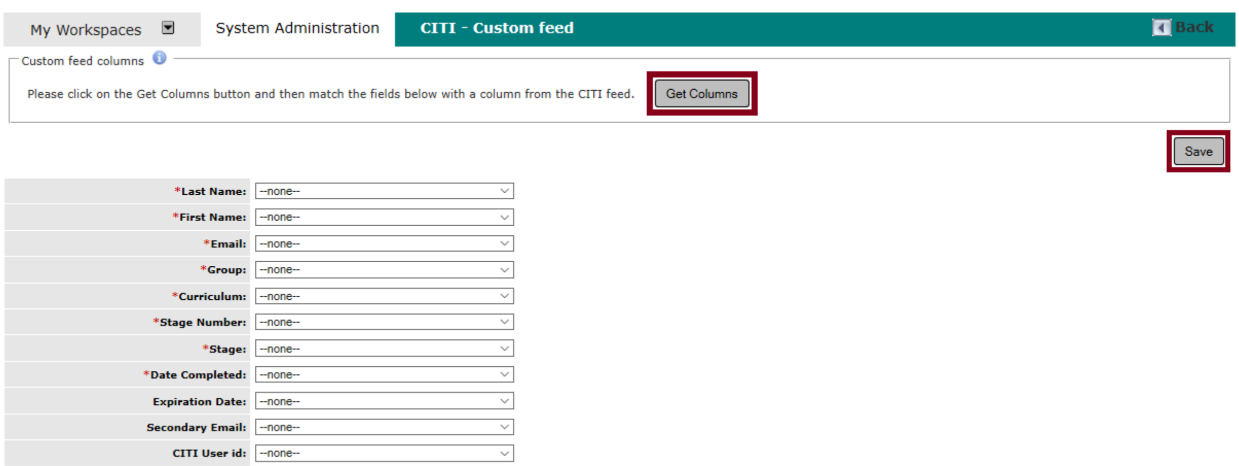
The **CITI – Custom Feed** page opens, as shown below.



The **Select System Feed** drop-down is used in institutions that have more than one system feed set up for updating CITI data in iRIS™. Those institutions select a system feed number from the drop-down, indicating which system feed should receive its data from the new, custom feed being created in this page.

For most institutions, the **Select System Feed** drop-down contains only the default value of 1.

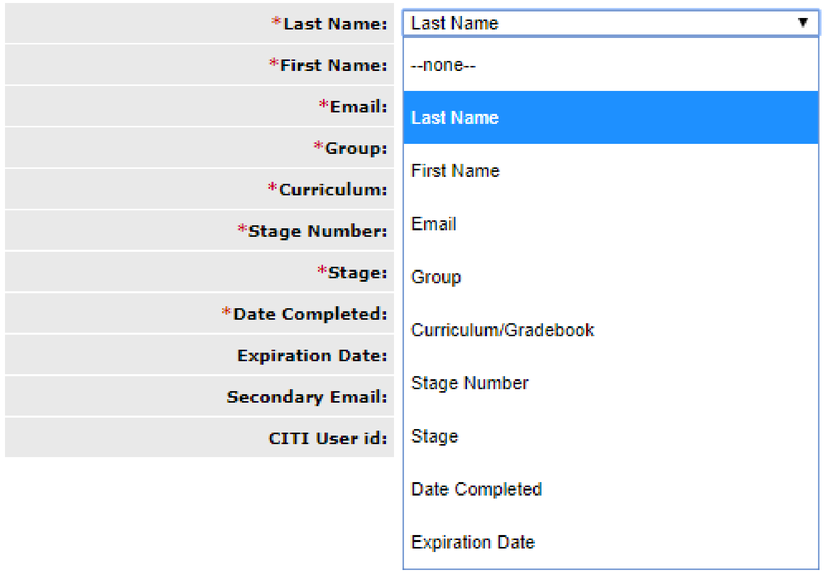
Click the **Add** button to create a new custom feed. The panel shown below is displayed.



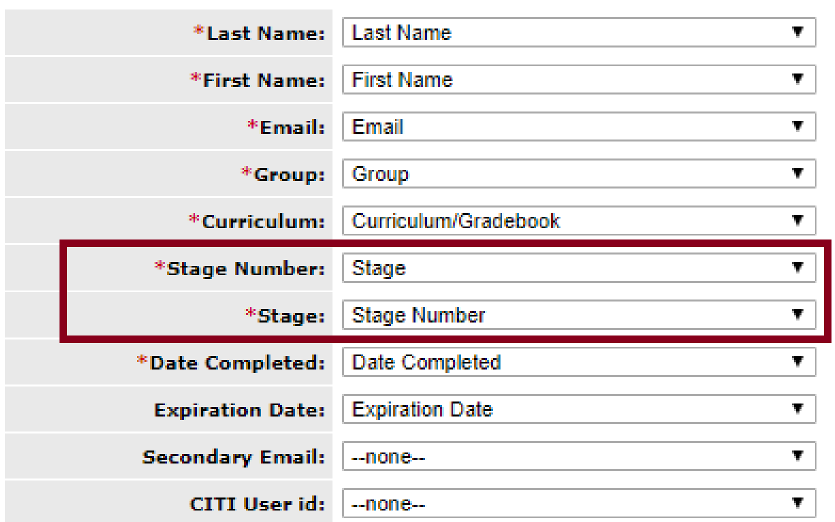
This screen is where the user can map columns from the incoming CITI feed to columns in their iRIS™ system. Note the **Get Columns** and **Save** buttons.

Click the **Get Columns** button to import a list of column names from the incoming CITI feed. Those column names now appear in the drop-down picklist to the right of each iRIS™ data field on the panel.

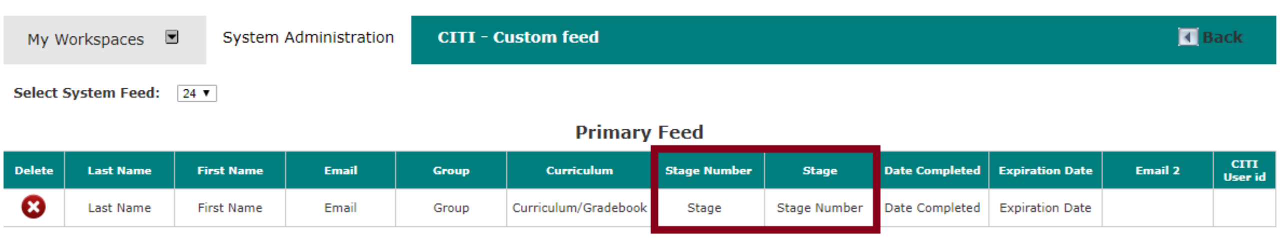
Select the desired item in the drop-down picklist to assign it to the respective iRIS™ data field.



In the example shown below, the incoming Stage data value is assigned to the **Stage Number** field and the incoming Stage Number data value is assigned to the **Stage** field.



Click the **Save** button to save changes and close the panel. The selected custom field mapping is now reflected in the feed.



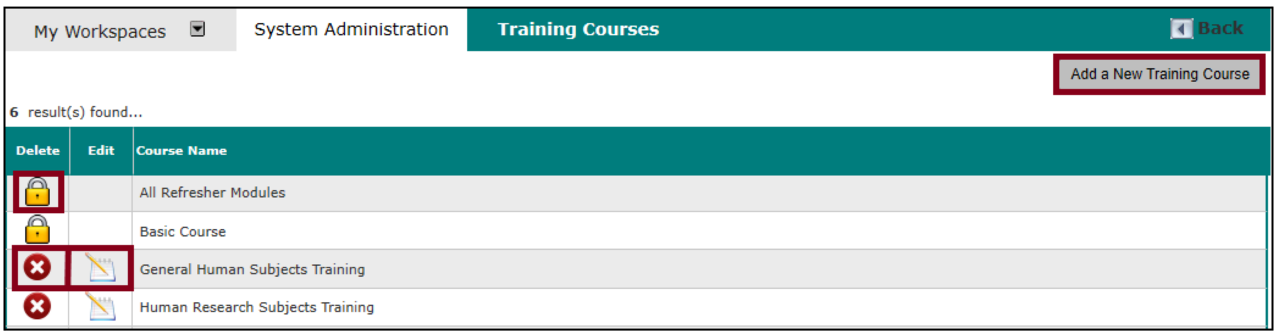
Training Courses

Where CITI is implemented in the iRIS™ system, the CITI feed automatically populates data pertaining to CITI courses in the system.

Institutions can also add their own training courses to the iRIS™ system. For more information, see the System Administration – User Training manual.

Available course titles, including both CITI and institution courses, can be viewed in System Administration > List Configuration and Maintenance > [User Profile Configurations section] / User Training Setup subsection] > Define Training Courses.

Available courses are listed in alphabetical order on the page.



The **Delete** column contains a padlock for CITI courses, indicating that those courses cannot be deleted by the institution. The column contains a Delete icon for courses added by the institution, indicating that those courses can be deleted by the institution. Click the Delete icon to delete a course. A confirmation pop-up displays.

The **Edit** column is blank for CITI courses, indicating that the institution cannot edit the name of any CITI courses. The column contains an edit icon for courses added by the institution, indicating that the names of those courses can be edited by the institution.

Click the Edit icon to open a form where the course name can be edited.

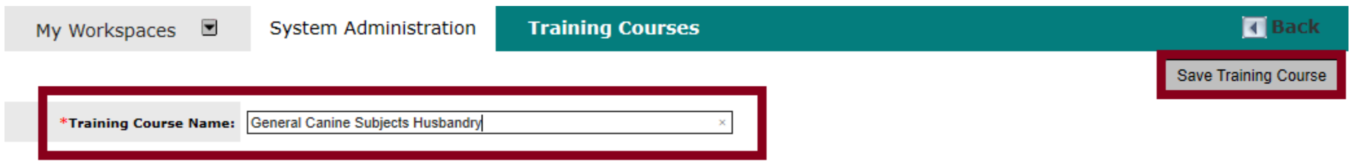
Add New Training Course

When a new training course is added to the CITI feed the name of the new course must be added to the iRIS™ system by the System Administrator, so that data coming in from the feed properly updates CITI data related the new course in the iRIS™ system.

On the Training Courses page (previous screenshot), click the **Add a New Training Course** button to open an add form.

In the add form, enter the name of the CITI course, *exactly* as it appears in the CITI feed, in the **Training Course Name** field, then click the **Save Training Course** button to save changes.

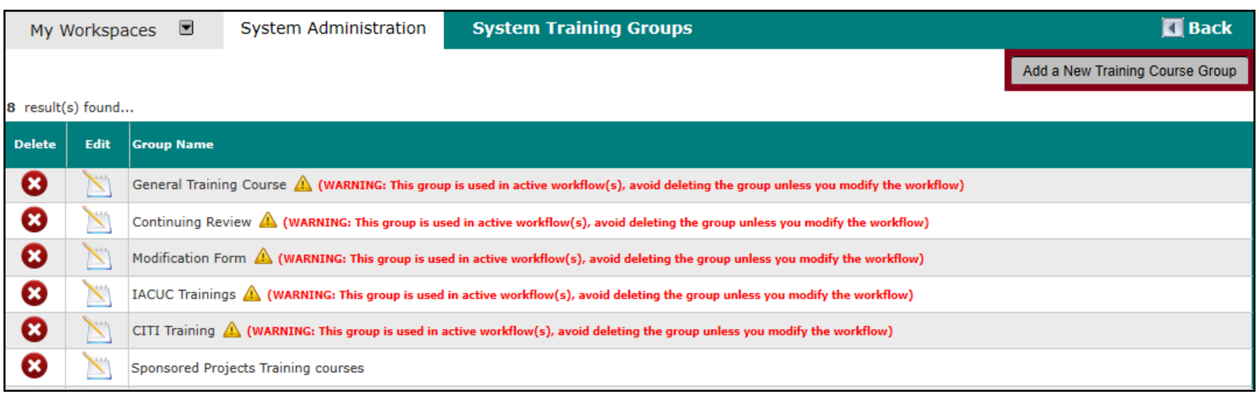
*Note: The **Training Course Name** entered here must be identical to the course name in the CITI feed, including any spaces and special characters such as underscores.*



Each course name must be unique.

Define Training Groups

Training Groups are administered through the **System Training Groups** page, which is accessed via System Administration > List Configuration and Maintenance > [User Profile Configurations section] / User Training Setup subsection] > Define Training Groups.



Training groups are used to create a collection, or curriculum, of courses that must *all* be completed in order to meet a specific institutional, study or regulatory requirement.

Add New Training Course Group

When a new training group is added to the CITI feed the name of the new group must be added to the iRIS™ system by the System Administrator, so that data coming in from the feed properly updates CITI data related the new group in the iRIS™ system.

To add a new training group, click the **Add a New Training Course Group** button on the System Training Groups page to open an add form.

In the add form, enter the **Training Group Name**, *exactly* as it appears in the CITI feed, in the **Training Group Name** field, then click the **Save Training Group** button to save changes.

*Note: The **Training Group Name** entered here must be identical to the training group name in the CITI feed.*

CITI Feed Update Operations

A CITI feed can be thought of as a data stream containing numerous individual records. Each record consists of user-identifying data such as name and email address, plus data pertaining to a training course in which the user is enrolled or which the user has completed (e.g., course name, certification expiration date). The CITI feed may contain multiple training course records for the same user, and each record is processed individually in the order it appears in the feed.

The CITI feed is generally configured to run unattended every six hours, but that configuration can be customized according to institution needs. The system processes the primary feed first. If a secondary feed URL is configured it doesn't run until processing of the first feed is complete.

When the CITI feed runs it performs certain validation checks and data updates. Processing for each record follows the same steps, in order, *regardless of any data changes that may have occurred on the iRIS™ side since the last time the feed ran.* The CITI feed has no "awareness" of iRIS™ data or operations apart from the very narrow, specific validation and update steps it performs:

Compare user email address(es)

Compare user CITI ID

Compare course name / create course

Compare training group name / associate user to group

Compare course expiration date / update course expiration date

Compare User Email Address(es)

First, user email data value(s) in the CITI feed record are compared to user email(s) in the iRIS™ user table.

If no match is found the record is routed to the Matchless Records queue (see Process Matchless Training Records section, later in this document) and processing moves on to the next record in the feed.

If a match exists processing of the record continues.

Compare User CITI ID

If neither a first nor second user email is matched, the user CITI ID in the CITI feed record is compared to the user's CITI ID in the iRIS™ user table.

If no match is found the record is routed to the Matchless Records queue (see Process Matchless Training Records section, later in this document) and processing moves on to the next record in the feed.

If a match exists processing of the record continues.

Compare Course Name

Third, the training course name in the CITI feed record is compared against existing course names already in the iRIS™ system.

If no match is found, a new course record is created in iRIS™.

If a match exists its location in the system is identified and processing of the record continues.

Compare Training Group Name

Fourth, any training group name in the CITI feed record is compared against existing training groups in iRIS™.

If no training group match is found the course named in the feed record will not be associated with any training group in iRIS™, and processing of the record continues. *The CITI feed does not create training groups in iRIS™.*

If a training group name match exists the user named in the CITI record is associated with that training group in iRIS™, and processing of the record continues.

Compare Course Expiration Date

Finally, the training course expiration date in the CITI feed record is compared against the expiration date in iRIS™ for the same course and user.

If no expiration date exists in the iRIS™ record, the field is updated with the CITI feed expiration date for the same course and user.

If an expiration date exists in the iRIS™ record, it is compared against the expiration date for the same course and user in the CITI feed.

If the expiration date in the CITI feed is more recent than the expiration date for the same course and user in iRIS™, iRIS™ is updated with the date value from the CITI feed and processing moves on to the next record in the feed.

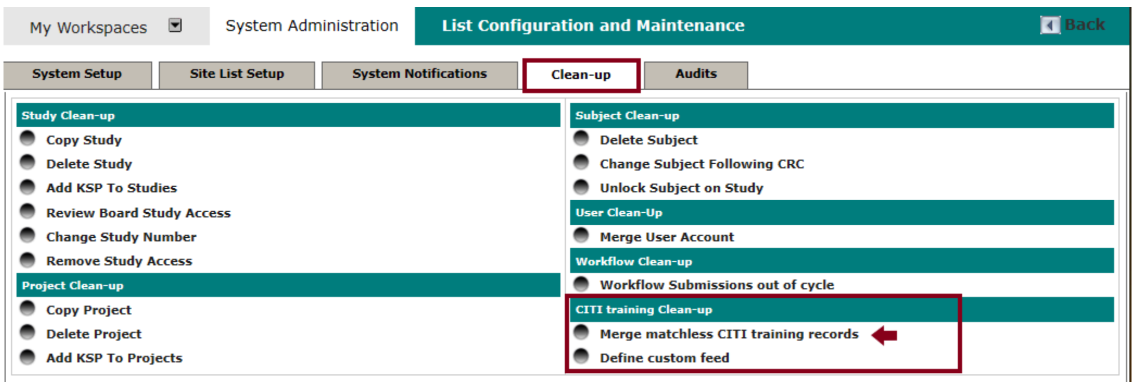
If the expiration date in the CITI feed is older than the same date for the same course and user in iRIS™, the iRIS™ date is retained and processing moves on to the next record in the feed.

Note that the CITI feed may contain historical as well as updated information. A single iRIS™ user may have multiple records for the same training course if the user completed, or must complete, the same course multiple times. However, because the CITI feed only updates a course expiration date in iRIS™ when its date is more recent than the corresponding date in iRIS™, there is no possibility of stale dated data overwriting current data nor of the CITI feed overwriting older, historical training records.

Process Matchless Training Records

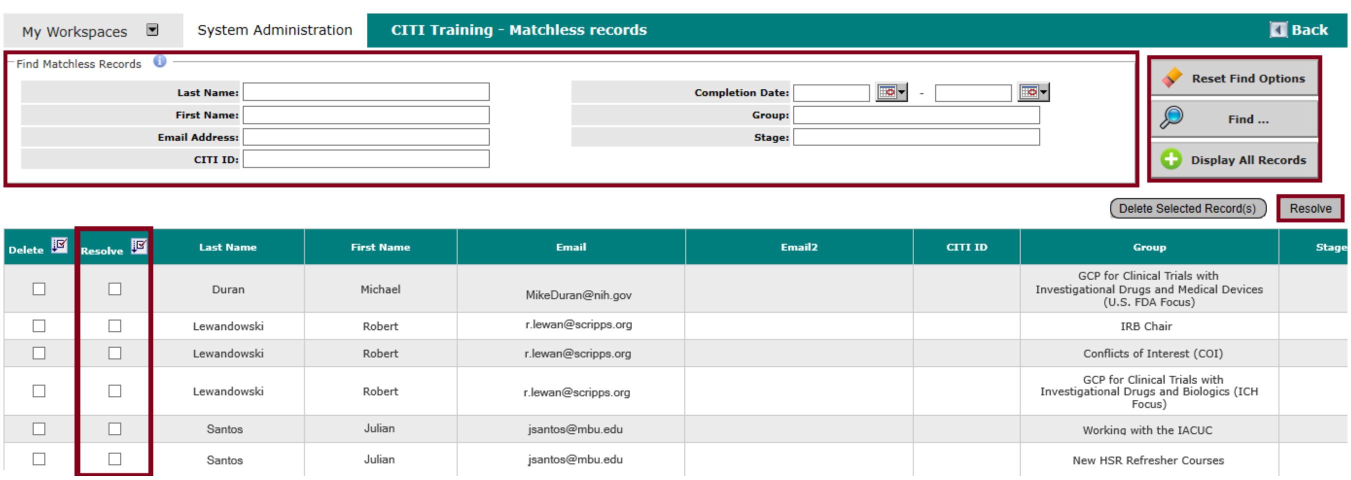
When the CITI feed runs and an iRIS™ user match is not found for the CITI feed email 1, email 2 or unique ID values entered for a training record, that record is considered "matchless" and is flagged as such in the iRIS™ system. This usually happens due to a missing email or unique ID, or due to data entry error in one of those three fields preventing an exact match to the corresponding iRIS™ user record.

In order to match the training record to an iRIS™ user, the correct user record must be located in the system and the unmatched training record assigned to that user. To process matchless records, navigate to System Administration > List Configuration and Maintenance > [Clean-up tab] > [CITI training Clean-up section] and click the **Merge matchless CITI training records** link.



The **CITI Training - Matchless records** page opens as shown below, containing a list of all matchless records returned by the most recent CITI feed run.

The search form at the top of the page allows for searching the matchless records list by **Last Name**, **First Name**, **Email Address**, **CITI ID**, **Completion Date** range, training **Group** or training **Stage** to locate a specific user in the list. Enter desired search criteria and click the **Find** button to the right of the search form.

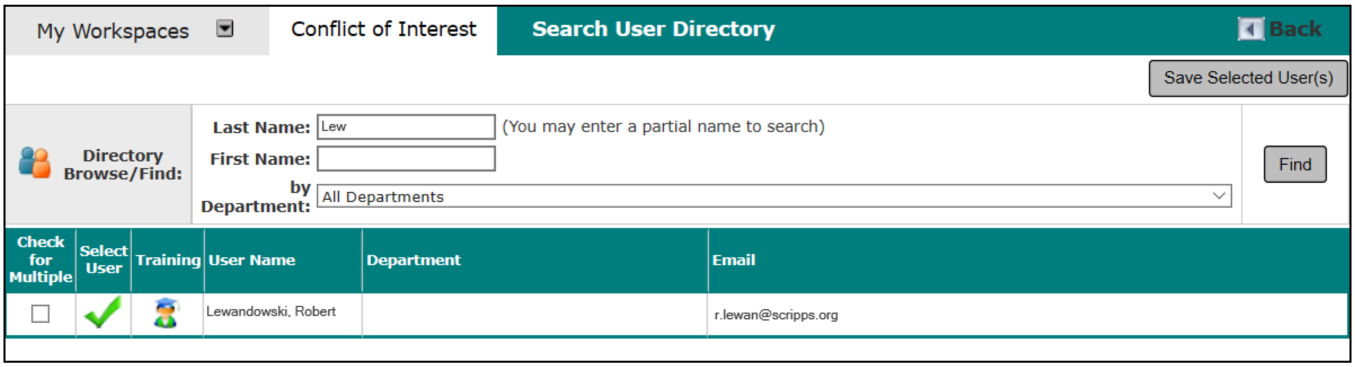


Records matching the search criteria populate in the list beneath the search form.

Click the **Reset Find Options** button to clear the search form. Click the **Display All Records** button to show all matchless records.

When the record to be resolved is visible in the results list select the **Resolve** checkbox to the left of the name, then click the **Resolve** button at the upper right. If there are multiple matchless records for the same iRIS™ user, select the **Resolve** checkbox for all the records to assign all of them to the same iRIS™ user.

When the Resolve button is clicked, the standard iRIS™ **Search User Directory** form opens.



Click the icon in the **Select User** column to assign the matchless record(s) selected in the previous step to the desired user. The search form closes and the **CITI Training - Matchless records** page reloads. The matched record no longer appears in the matchless records list, and the user's training data is updated with information from the CITI feed.

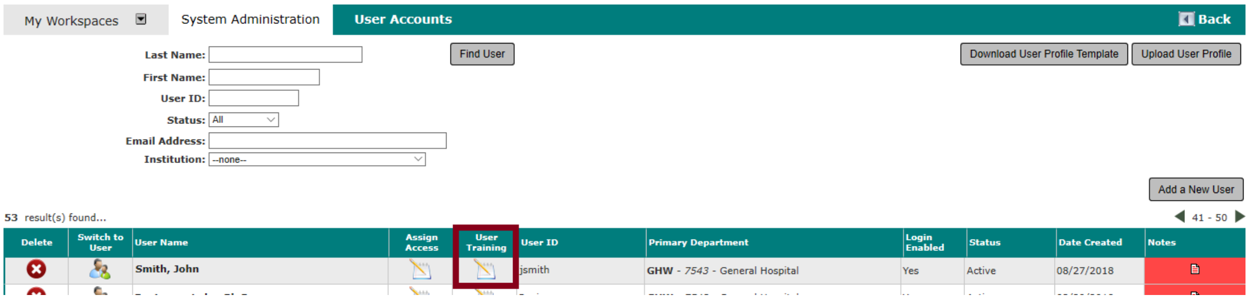
Verify Changes

Because data errors or inconsistencies with respect to CITI training courses can prevent users from accessing or completing the training, they need to continue their work, it is vitally important to validate any changes to CITI feeds or courses.

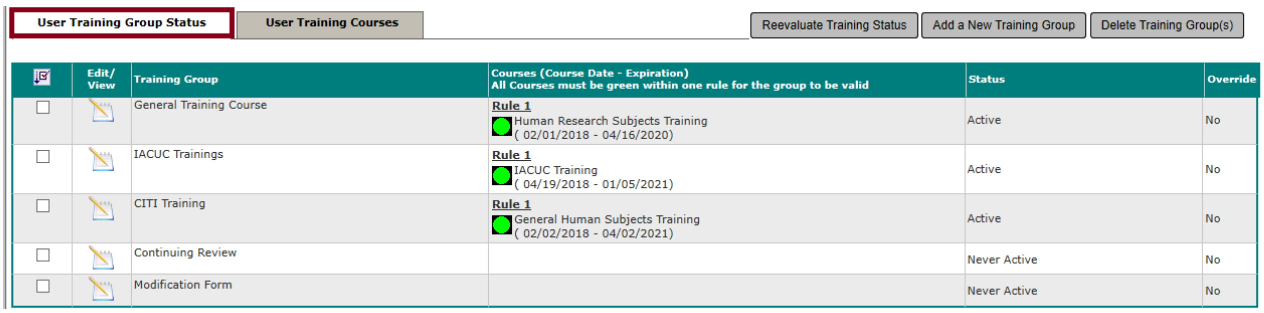
Once the feed has been correctly configured in the system and has run successfully, updated User Training Group and Course data can be verified by either the System Administrator or the user.

System Administrator: Training Update Verification

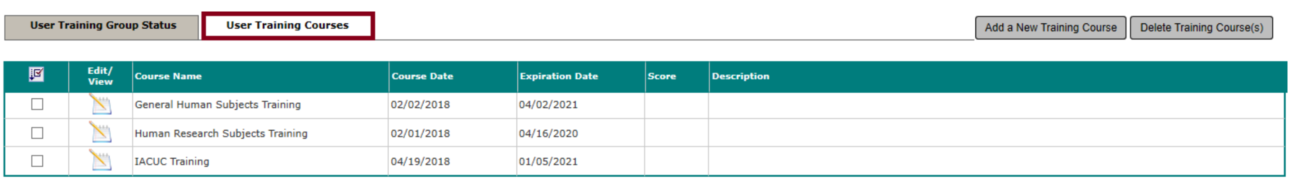
The System Administrator can navigate to System Administration > **User Accounts** and look up the user whose records are to be verified. In the user's record, the System Administrator can click the icon in the **User Training** column to view training details.



A training record list page opens, with the **User Training Group Status** tab selected by default.



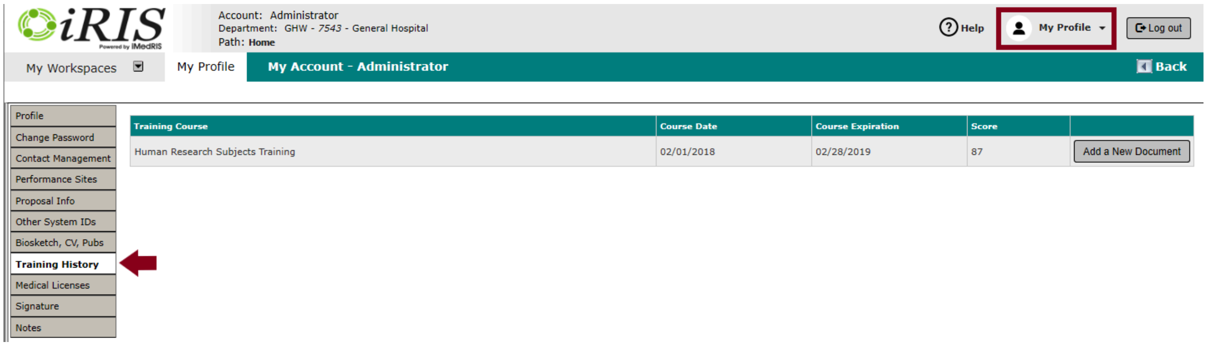
The System Administrator verifies user training group details on this tab and clicks the **User Training Courses** tab (shown below) to view course details for the user.



For more information about the other text and controls on these pages, see the System Administration – User Training manual.

User: Training Update Verification

The user can click the My Profile drop-down control at the upper right corner of the browser window and select My Account from the list to load the **My Account** page. The user can then click the **Training History** tab to view their training history details.


iRIS
Powered by iMedRIS
Account: Administrator
Department: GHW - 7543 - General Hospital
Path: Home
Help
My Profile
Log out
My Workspaces
My Profile
My Account - Administrator
Back
Profile
Change Password
Contact Management
Performance Sites
Proposal Info
Other System IDs
Biosketch, CV, Pubs
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