Planning Trial Locations in a Protocol

Utilize the Trial Location table to plan out the individual trial locations for an experiment. Find it on the Trial Establishment Guidelines section of the Protocol Description.

Each row in the table represents a single trial (the Trial ID being the primary column), or represents a person responsible for organizing trials (Responsible as the primary column). Use 'Number of Trials' column if more than one trial may be assigned per person.

Available Fields

Fill in information that is pertinent to the planning process, or to pre-fill known details about the trial. ARM copies some of this information to the trial, except as noted below.

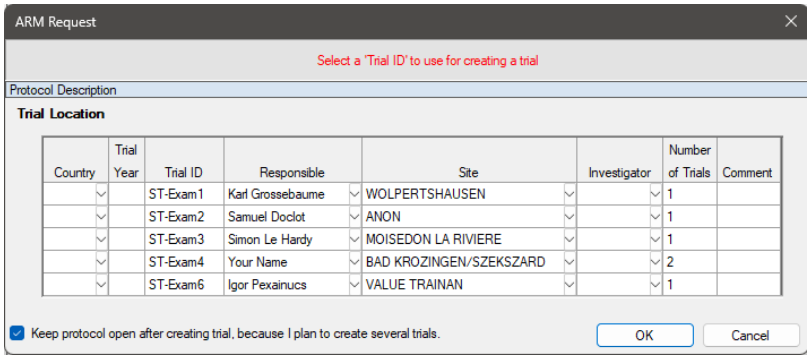
Field Name (in Protocol)	Description	Section in Trial File	Field Name (in Trial)
Country	Country where the planned trial is to be located.	Site Description > General Trial	Country
State	State or province of the planned trial.	Site Description > General Trial	State/Prov
Region	Identifier for a regional area the trial is located in. Examples include: a local/relative category like "southeast" or a global region like "APA" or "South America".	Site Description > General Trial	Region
Trial Year	Planned year or research season when the majority of trial work is conducted.	Header editor	Trial Year
Trial ID	Unique ID to use for the planned trial. If Number of Trials is more than 1, include a range of values for this field. For example, "GDM1-4" to plan 4 trials, which should have IDs of GDM1, GDM2, GDM3, and GDM4.	Header editor	Trial ID
Responsible	Person responsible for conducting the trial. This may be the investigator for a single trial, or the study director that is planning multiple trials.	NOT copied to trial Allows flexibility in what role this person holds.	NA
Vendor ID	An optional ID number to identify the person in Responsible. Example: a customer number of shipping product for the study.	NOT copied to trial	NA
Site	A brief description of the trial location.	Header editor	Location
GDM ID Company ID Company Name	ARM license ID numbers of the person responsible for conducting the trial. See 'Hiding trial locations from others' below for more information about this functionality.	NOT copied to trial	NA
Investigator	This role may be used differently from company to company, but according to OECD: the investigator is an individual acts on behalf of the Study Director and has defined responsibility for delegated phases of the trial.	Site Description > Contacts section	Investigator
Cooperator	Name of the cooperator conducting the trial, or the owner of the trial location.	Site Description > Contacts section	Cooperator
Trial Origin	Category of how the trial is performed (in-house, contracted, or public institution).	Header editor	Trial Origin

Number of Trials	The number of trials to be conducted, at this location or through the person Responsible. If more than one, ARM creates multiple trials and prompts for a unique ID for each. (See Trial ID above)	NA	NA
Trial Cost, Unit	The anticipated cost (and currency) to conduct this trial. If Number of Trials is more than 1, this is the cost for one trial. Copied to the trial, to the Site and Design section.	Site Description > Site and Design	Trial Cost, Unit
Status	Status of the planned trial, e.g. active or cancelled.	NOT copied to trial	NA
Secrecy Agreement	Describes the type of agreement required for this trial, e.g. secrecy or testing agreement.	NOT copied to trial	NA
Internal Operating No.	A number or ID/code associated with the planned trial for use by the sponsor only. This links planned trials with any internal system, like a budgeting ID, that may not be directly related to research.	NOT copied to trial	NA
Interim Data Due	Communicate the deadline for sending interim data back to the sponsor.	Site Description > General Trial	Interim Data Due
Final Report Due	Communicate the deadline for sending a final report back to the sponsor.	Site Description > General Trial	Final Report Due
Site Requirements	Any special requirements or considerations for the trial site. Examples include requirements for location, cropping, soil, or infestation.	NOT copied to trial	NA
Comment	General comment for additional information about the planned trial.	NOT copied to trial	NA

Creating trials

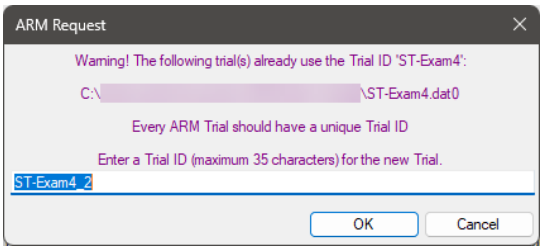
When creating a trial, ARM displays the Trial Location table to select the appropriate planned trial to create.

Click on the Trial ID to create, and then select OK to create that planned trial.



When 'Number of Trials' is greater than one:

- Create multiple trials by selecting "Keep protocol open…" box before clicking OK.
- A unique Trial ID should be used for each trial, so ARM prompts on additional trials to set a new ID:



Hiding trial locations from others

Limit who can view individual rows of this table by entering a Company ID or GDM ID for the person responsible for the planned trial. When the protocol is opened by another ARM user, only rows assigned to the same company as the current ARM user are visible (any rows that have no Company ID or GDM ID are also visible).

For example, a researcher from "SponsorCompany" creates a protocol with the following planned trials:

Trial ID	Responsible	GDM ID	Company ID	Company Name
Trial1	Debra Dooley		11111	Dooley's Data
Trial2	R.E. Cearch		12345	ZXY Research
Trial3	Eddie Munster	MUN321		Munster's Mining
Trial4	Bob Smith		12345	ZXY Research
Trial5	Susan Sample			

The table displays as follows for different users:

Any user from **Munster's Mining**:

They only see Trial3 (because a GDM ID from their company is linked) and Trial5 (because no GDM/Company ID is entered).

Trial ID	Responsible	GDM ID	Company ID	Company Name
Trial3	Eddie Munster	MUN321		Munster's Mining
Trial5	Susan Sample			

Any user from **ZXY Research**:

They only see Trial2, Trial4 (because their company is linked), and Trial5 (because no GDM/Company ID is entered).

Trial ID	Responsible	GDM ID	Company ID	Company Name
Trial2	R.E. Cearch		12345	ZXY Research
Trial4	Bob Smith		12345	ZXY Research
Trial5	Susan Sample			

Any user from **SponsorCompany**:

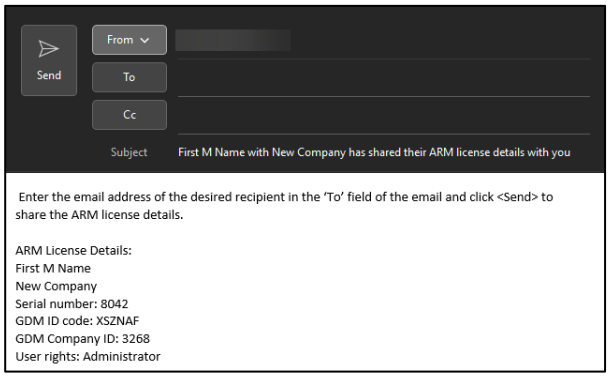
They see all 5 trials (because they are from the same company as the protocol creator/owner).

Trial ID	Responsible	GDM ID	Company ID	Company Name
Trial1	Debra Dooley		11111	Dooley's Data
Trial2	R.E. Cearch		12345	ZXY Research
Trial3	Eddie Munster	MUN321		Munster's Mining
Trial4	Bob Smith		12345	ZXY Research
Trial5	Susan Sample			

Any user from a **company NOT listed** in table:

They only see Trial5 (because no GDM/Company ID is entered).

Trial ID	Responsible	GDM ID	Company ID	Company Name
Trial5	Susan Sample			



To obtain the GDM ID and Company ID for a researcher, they should select **Help** > **Profile** > **Send License Details**. This generates an email message with their license information, including the needed IDs.

Keep track of IDs for companies with your own Company ID personal list in ARM.