



## How to Search for an ISA (QRG)

This Quick Reference Guide covers the following topics:

- 1 Search for an ISA you are hosting
- 2 Search for an ISA you are participating in
- 3 Search for an ISA you want to participate in

### Search for and view ISAs your organisation is hosting

The screenshot shows the 'ISA - Registry' interface. The navigation bar includes 'Dashboard', 'ISA - Registry', 'ISA - Management', 'DPC', 'Data Sharing', 'Activity', 'Organisation Profile', 'User Preferences', and 'Reports'. The 'ISA - Registry' tab is selected. Below the navigation bar, there is a search and filter section with the following fields: 'Agreement Title / Reference', 'All Status', 'All DPC Status', 'All Dpia Status', 'All Risk Rating', and 'Choose Services'. Below these fields are 'Filter' and 'Clear Filters' buttons. A table below the search section lists ISAs with columns for Title, From Date, To Date, Status, DPIA, Risk, Participant Status (Active, Pending, Incoming, Associated), and DPC (Host, Pending, Active). The table contains four rows of data.

1. Click on 'ISA – Registry' tab from the navigation bar
2. The 'ISA - Registry' screen is displayed with a full list of the organisation's ISAs that are being hosted
3. Above the list of ISAs, a search and filter facilities are available with search boxes and filter drop-downs allowing you to show information by Agreement Title/Reference, ISA status, DPC status, DPIA status, Risk Rating or the services the host ISA provides

This close-up screenshot focuses on the search and filter section. Callout 4 points to the search fields: 'Agreement Title / Reference', 'All Status', 'All DPC Status', 'All Dpia Status', 'All Risk Rating', and 'Choose Services'. Callout 5 points to the green 'Filter' button. Callout 6 points to the grey 'Clear Filter' button.

4. Enter the search preferences in any of the fields search fields. You can also narrow down the search by selecting the options from the drop-down lists
5. Then select the **Apply Filter** ( **Filter** ) button or press the 'Enter/Return' key on the Keyboard to display the filtered results
6. To clear the fields and search again, select the 'Clear Filter' ( **Clear Filter** ) button. Search results are displayed
7. Select the desired ISA from the search results by clicking on the title. The 'ISA - Registry > Edit Details' screen is displayed



## Search for and view ISAs your organisation is participating in

Under 'ISA Management > My ISA – Management' tab, you will see the ISAs that you have been invited to or requested access to. The 'ISA – Management' tab shows all of the ISAs you are participating in.

Create Date	Title	Organisation	From Date	To Date	Status	DPIA	Risk	DPC Count	My Org	Message	Clone	Sharing	PDF
24-Oct-2018	Drop1 TESTISA1	DROP TEST1 ORG1	01-Oct-2018	No end date	Active	Completed Digitally	Green	0	0		Clone	Sharing	PDF
26-Oct-2018	NWLTESTISA102018	DROP TEST1 ORG1	26-Oct-2018	No end date	Active	Completed Digitally	Green	0	0		Clone	Sharing	PDF

8. Select 'ISA – Management' from the navigation bar. The 'ISA - Management' screen is displayed with the 'My ISA - Management' tab in focus listing the ISA's that your organisation has been invited to or requested access to
9. Above the list of ISAs, a search facility is available with search boxes allowing you to search by 'Agreement Title', 'Organisation Name', 'organisation status', 'DPC status', 'DPIA status', 'Risk Rating', 'All Services', 'All Data Templates' and/or the 'All Data Sections' that the ISA is associated with
10. Enter the search preferences in the search fields. You may narrow down the search by selecting the 'Status' filter if desired from the drop-down list. Then click **Filter** (  ) button or press the 'Enter/Return' key on the Keyboard

**Note:** To clear the fields and search again, select the **Clear Filter** (  ) button

Create Date	Title	Organisation	From Date	To Date	Status	DPIA	Risk	DPC Count	My Org	Message	Clone	Sharing	PDF
24-Oct-2018	Drop1 TESTISA1	DROP TEST1 ORG1	01-Oct-2018	No end date	Active	Completed Digitally	Green	0	0		Clone	Sharing	PDF
26-Oct-2018	NWLTESTISA102018	DROP TEST1 ORG1	26-Oct-2018	No end date	Active	Completed Digitally	Green	0	0		Clone	Sharing	PDF

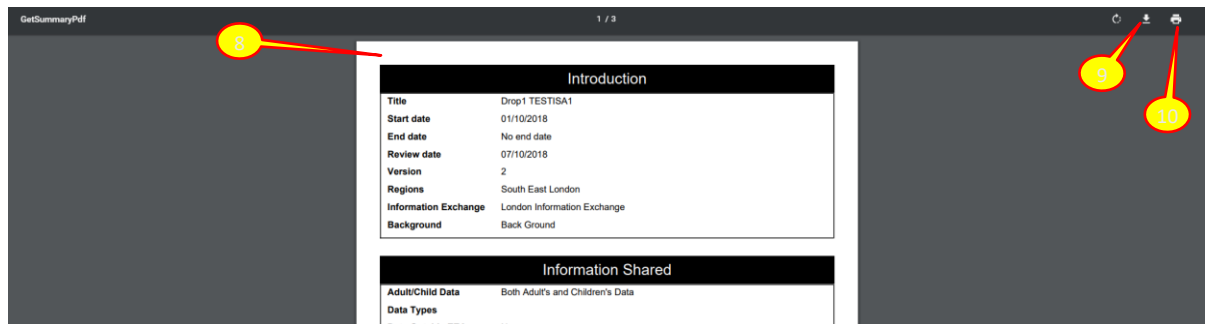
11. Select the desired ISA from the search results by clicking on the ISA title in the 'Title' column or click the View (  ) button adjacent to the ISA


**Caution:** If you click on the organisation name, that organisation's profile will be displayed in read-only mode and not the ISA details.


12. To use a copy of an ISA as a basis for another ISA use the Clone (  ) button. A new partially populated ISA will appear in the ISA registry window
13. To view a graphical view of an ISAs sharing click on the Sharing (  ) button adjacent to the ISA
14. To create a PDF version of an ISA click on the PDF (  ) button



15. The PDF will open in another tab on your browser and can be saved from there, see below

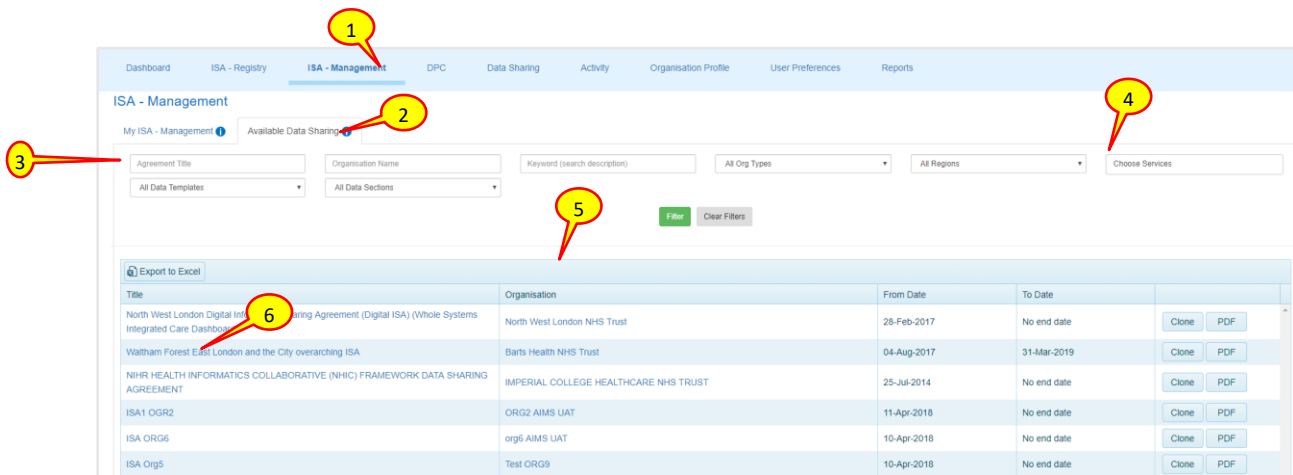



16. To download and save a copy of the ISA in PDF format, click the download (  ) button

17. To print a copy of the ISA, click the printer (  ) button

### Search for and view all ISAs that are hosted by other organisations

Under 'ISA Management > My ISA – Management' tab, you will see ISAs which are currently available that you have not been invited on or requested access to.



1. Click on ISA - Management from the top menu. The 'ISA - Management' screen is displayed with the 'My ISA - Management' tab in focus listing ISAs that the organisation has been invited on or requested access to
2. Click on the 'Available Data Sharing' tab to select it
3. The ISA 'Available Data Sharing' screen is displayed
4. To see all available ISAs that are available, click the Filter (  )
5. The table is populated with a list of the available ISAs from other organisations
6. To view the details on a particular ISA click on the ISA title




ISA - Management

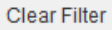
My ISA - Management Available Data Sharing

Agreement Title Organisation Name Keyword (search description) All Org Types All Regions Choose Services

All Data Templates All Data Sections

Filter Clear Filters

7. Above the list of ISAs, a search facility is available with search boxes allowing you to search by 'Agreement Title', 'Organisation Name', and 'Keyword' in the description, and to filter by 'Organisation Type', 'Region', 'Services', 'Data Templates' and 'Data Sections'
8. Enter the search preferences in the search fields. You may narrow down the search by selecting the 'Organisation Type' and/or 'Region' filter if desired from the drop-down lists. Then click **Filter** (  ) or press the 'Enter/Return' key on the Keyboard. The search results are displayed

**Note:** To clear the fields and search again, select the **Clear Filter** (  ) button

9. Select the desired ISA from the search results by clicking on the title

**Caution:** If you click on the organisation name, that organisations profile will be displayed.