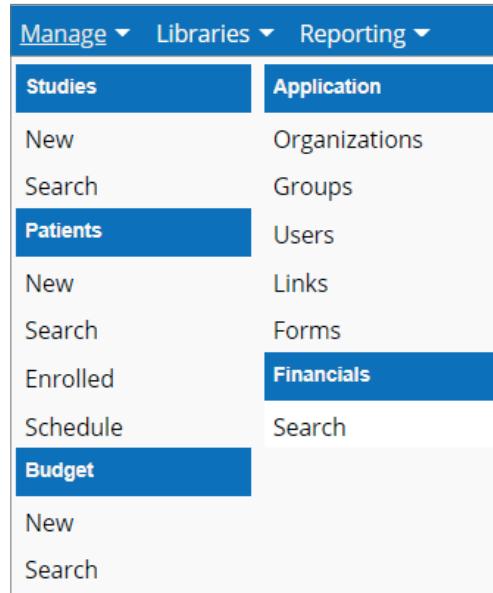


Overview



Note: Thoughtful, forward-thinking design of organizations and groups is key to successful eResearch implementations and workflow design.

Account Management

The foundation of Velos eResearch, for Enterprise customers, begins with the configuration of these account management settings. For eXpress customers, a default set of groups are included.

Account Administration is managed by the customer's system administrator.

Account Management, under Application in the Manage dropdown, includes:

- **Organizations:** Represents an entity (Hospital, Laboratory, Site, or Department). Each study, user, and patient must be associated to at least one organization but can be given access or associated to multiple.
- **Groups:** Defines a user's application-level access rights within eResearch. The group name should identify the type of users that will be assigned to the group. The default group is Admin. Groups can also be given super-user access for budgets or studies, enabling a permissioned group broad access to these elements throughout eResearch.
- **Users:** Represents a person as a system or non-system user. A system user account is assigned to a primary organization and a default group to enter and view data. The purpose of a Non-System user account is to associate user information to study, patient, or other relevant system data for informational or notification purposes only without providing direct system access.
- **Links:** Allows the site system administrator to list general resource links to Quick Links for all account users. Quick Links can be displayed on either the default Homepage or Adverse Event entry page.
- **Forms:** Allows permissioned users to manage all forms in the system that have been associated with patients, studies, or the account from the Form Management page. The Manage Forms page allows you to delete forms, copy existing forms, or add forms from your library.



Manage ▾ Libraries ▾ Reporting ▾

Studies	Application
New	Organizations
Search	Groups
Patients	Users
New	Links
Search	Forms
Enrolled	Financials
Schedule	Search
Budget	
New	
Search	

Add an Organization

From the **Manage** drop down, select **Organizations** under the "Application" heading.

The Organizations page displays, where users can click **Add a New Organization** on the right side of the page.

Add a New Organization



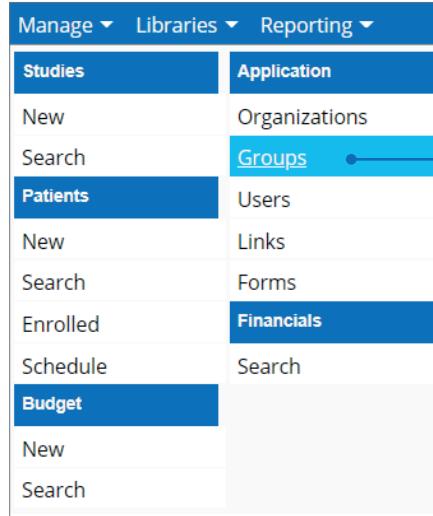
▶ Current Page: Manage Account >> Organization Details

Organizations	Groups	Users	Account Links	Form Management
Organization Details				
Organization Name*	<input type="text"/>			
Type*	<input type="button" value="Select an option"/>			
Description	<input type="text"/>			
Parent Organization	<input type="button" value="Select an option"/>			
Site ID	<input type="text"/>			
NCI PO-ID	<input type="text"/>			
Address	<input type="text"/>			
City	<input type="text"/>			
State	<input type="text"/>			
Zip/Postal Code	<input type="text"/>			
Country	<input type="text"/>			
Contact Phone	<input type="text"/>			
Contact E-Mail	<input type="text"/>			
Notes	<input type="text"/>			
CTEP ID	<input type="text"/>			
More Organization Details				
<input type="button" value="Submit"/>				

Organization Details

Fill in the required information, as indicated by an asterisk, and any additional information as needed in the available fields and click the **Submit** button to save your new group.

Manage Groups



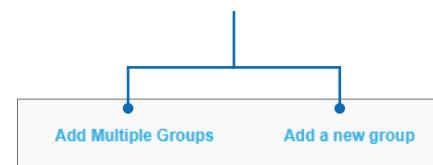
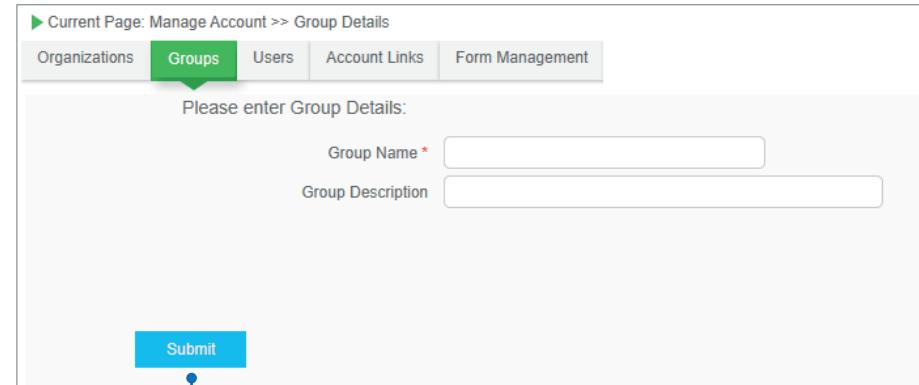
Manage ▾ Libraries ▾ Reporting ▾

Studies	Application
New	Organizations
Search	Groups
Patients	Users
New	Links
Search	Forms
Enrolled	Financials
Schedule	Search
Budget	
New	
Search	

Add Groups

From the **Manage** drop down, select **Groups** under the "Application" heading.

The Group Details page displays, where users can click **Add multiple groups** or **Add a new group** on the right side of the page.

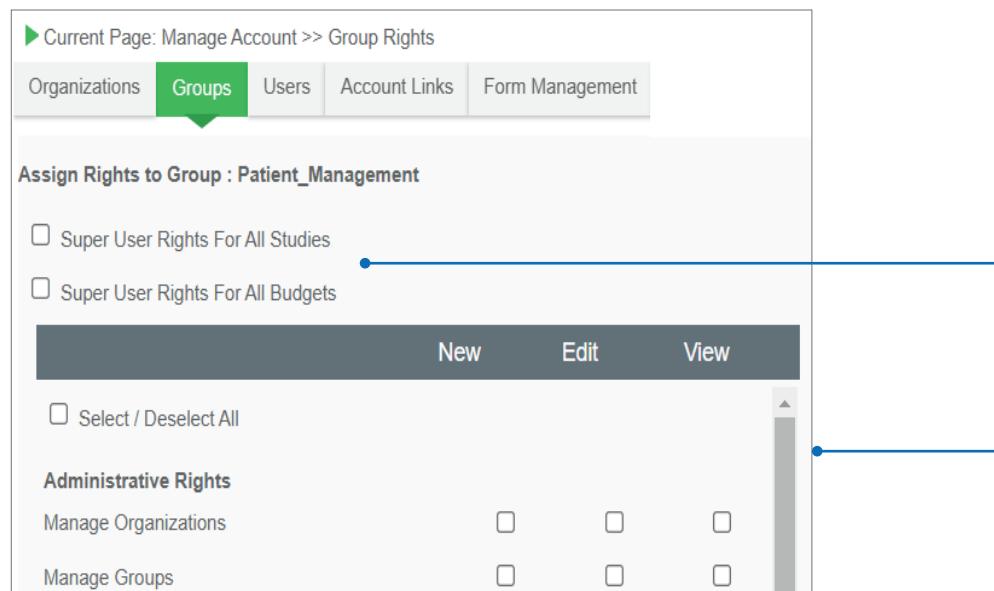



▶ Current Page: Manage Account >> Group Details

Organizations	Groups	Users	Account Links	Form Management
Please enter Group Details:				
Group Name * <input type="text"/> Group Description <input type="text"/>				
<input type="button" value="Submit"/>				

Group Details

Enter a group name and description into the available fields and click the **Submit** button to save your new group. For existing groups, rights are accessed by clicking the **Assign** button or by clicking on the group name on the groups page.



▶ Current Page: Manage Account >> Group Rights

Organizations	Groups	Users	Account Links	Form Management
Assign Rights to Group : Patient_Management				
<input type="checkbox"/> Super User Rights For All Studies <input type="checkbox"/> Super User Rights For All Budgets <input type="checkbox"/> Select / Deselect All				
Administrative Rights Manage Organizations <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Manage Groups <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				

Assign Super User Rights

Super user permissions provide users in this group with broad access (as defined per group) to studies and/or budgets without having to be added to those study teams or budgets specifically. From the **Group Management** page, specific **Super User Rights** can be assigned for a group by checking the box next to one or both options.

Assign Rights to a Group

The new group is added to the **Group Management** page and the **Assign Rights** to a group page can be modified.



Manage ▾ Libraries ▾ Reporting ▾

Studies	Application
New	Organizations
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New	
Search	

Edit Users

Select a user's name to manage the user. Add or modify the information on the **User Details** page, as necessary.

Current Page: User Details

Organizations	Groups	Users	Account Links	Form Management
Member Information				
User Details				
First Name *	Middle Name	Last Name *	Job Type	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Select an option"/>	
Address	City	State	Zip/Postal Code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Country	Time Zone *			
<input type="text"/>	<input type="button" value="Select an option"/>			

Active Account Users

From the **Manage** drop down, select **Users** under the "Application" heading.

The Active Account Users page displays, where new users can be created, and existing user accounts can be modified, passwords reset, or contacted via system email. Select **Add A New User** to add a new user.

Current Page: Manage Account >> Active Account Users

Organizations	Groups	Users	Account Links	Form Management
Filter by User Status				
<input checked="" type="checkbox"/> Active: 13 <input type="checkbox"/> Non-System: 0 <input type="checkbox"/> Deactivated: 1				
Add a new user Run activity report				
User Name	Email	Status	Group Name	Additional Groups
<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/> Active	Admin	WCG - VELOS
<input type="button" value="Reset Password"/> <input type="button" value="Reset User Session"/> <input type="button" value="Reset"/>				

Manage Global User Settings

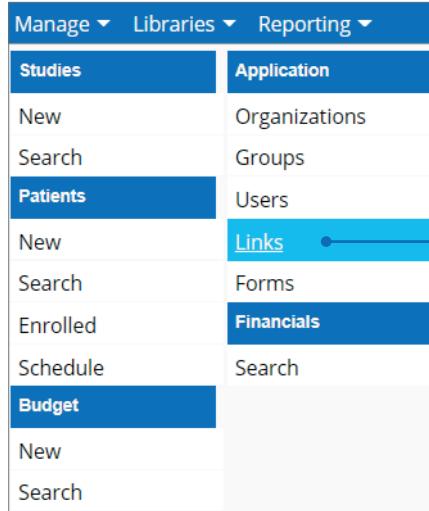
Click the **Global User Settings** button on the upper-right hand side of the screen. Enter or select the desired values for each available field, checking the **Allow override** box for any settings you would like users to be able to change.

Admin Settings

Set defaults for users of your system. By clicking 'Allow override' you will give users the ability to change these settings within modules.

TIME ZONES	USERS
<input type="button" value="Select an option"/>	(GMT-08:00) Pacific Time (US and Canada) Tijuana <input checked="" type="checkbox"/> Allow override
PATIENTS	(GMT-08:00) Pacific Time (US and Canada) Tijuana <input checked="" type="checkbox"/> Allow override

Manage Quick Links



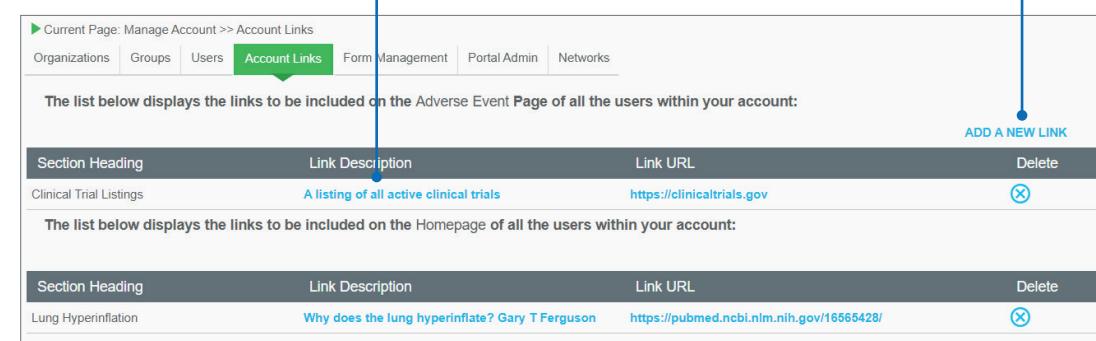
Manage ▾ Libraries ▾ Reporting ▾

Studies	Application
New	Organizations
Search	Groups
Patients	Users
New	Links
Search	Forms
Enrolled	Financials
Schedule	Search
Budget	
New	
Search	

Account Links

Account links provide common URL resources on the default home page or the Adverse Events page as quick links for all users and are configured by permissioned users from the Account Links page.

From the **Manage** drop down, select **Links** under the "Application" heading. The Account Links page displays, where users may modify existing links by selecting the **General** or **Adverse Event** link, or **Add A New Link**.



▶ Current Page: Manage Account >> Account Links

Section Heading	Link Description	Link URL	Delete
Clinical Trial Listings	A listing of all active clinical trials	https://clinicaltrials.gov	

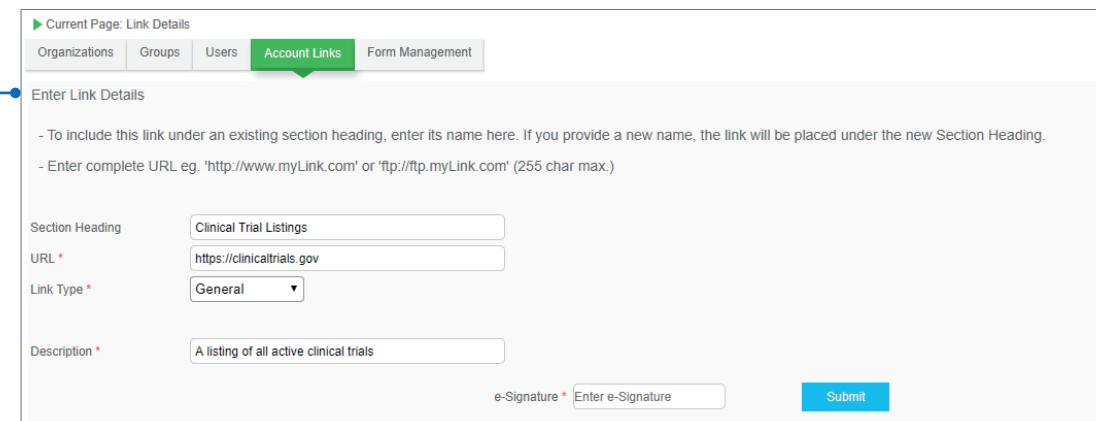
The list below displays the links to be included on the Adverse Event Page of all the users within your account:

Section Heading	Link Description	Link URL	Delete
Lung Hyperinflation	Why does the lung hyperinflate? Gary T Ferguson	https://pubmed.ncbi.nlm.nih.gov/16565428/	

The list below displays the links to be included on the Homepage of all the users within your account:

Link Details

Users can enter the required information into the available fields including **Section Heading**, **URL**, and **Description** details. The **Link Type** is either "General" or "Adverse Event".



▶ Current Page: Link Details

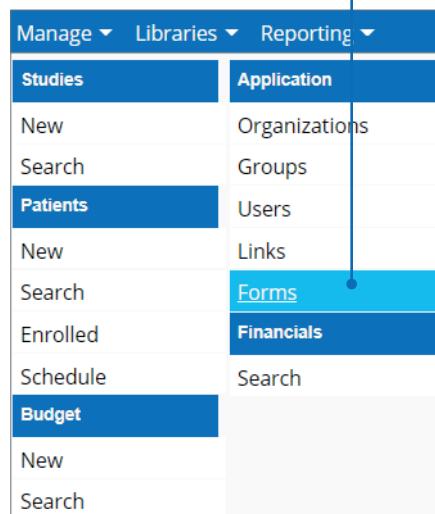
Section Heading	Clinical Trial Listings
URL *	https://clinicaltrials.gov
Link Type *	General
Description *	A listing of all active clinical trials

Enter Link Details

- To include this link under an existing section heading, enter its name here. If you provide a new name, the link will be placed under the new Section Heading.

- Enter complete URL eg. 'http://www.myLink.com' or 'ftp://ftp.myLink.com' (255 char max.)

e-Signature * Enter e-Signature



Account Forms

From the **Manage** drop down, select **Forms** under the "Application" heading.

Current Page: Manage Account >> Form Management

Organizations Groups Users Account Links Form Management

Search By

Form Name: Study: Select

Group: Linked To: Select an option

Organization: Search

Selected Filters are: Form Name: **All** Study: **All** Linked To: **All** Organization: **All** Group: **All**

Currently associated forms are: **COPY AN EXISTING FORM** **DISPLAY AND SEQUENCING OPTIONS**

Name	Description	Linked To	Study	Form Status	Preview	Delete	Info	Save to Library
MERRS-6 Questionnaire	MERRS-6 Questionnaire - Lung Health Rating Scale	Patient(Specific Study)	0986776	Active	<input type="button"/>	<input checked="" type="button"/>	<input type="button"/>	<input type="button"/>
MERRS-6 Questionnaire	MERRS-6 Questionnaire - Lung Health Rating Scale	Patient(Specific Study)	09877	Active	<input type="button"/>	<input checked="" type="button"/>	<input type="button"/>	<input type="button"/>

SELECT A FORM FROM YOUR LIBRARY

Current Page: Forms >> Define the Form

Define the Form Add Fields Form Settings

Form Name *

Form Description

Form Category *

Form Status *

e-Signature is Mandatory for this form's responses

Create a New Form

From the Form Selection page, click **Create a New Form**. Edit information as appropriate.

Copy an Existing Form

Allows you to copy a form that is already linked to a module.

Search a Form

Form Name: Form Category: Select an option

The following are the Forms currently listed in your Library. Select Account or go to the Form Library to create a new Form.

CREATE A NEW FORM

Select Form Name Form Category