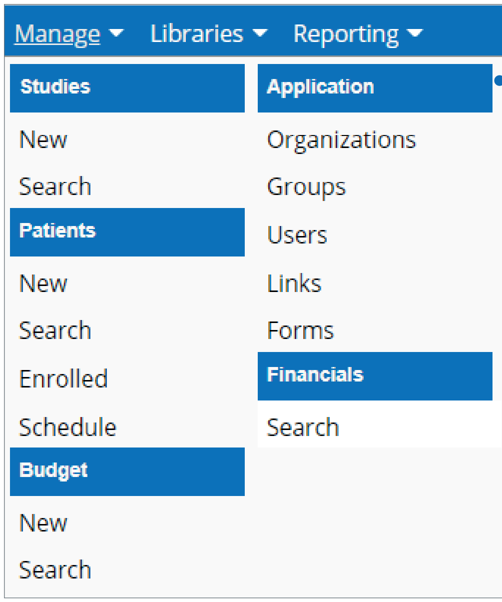
Overview



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

Account Management

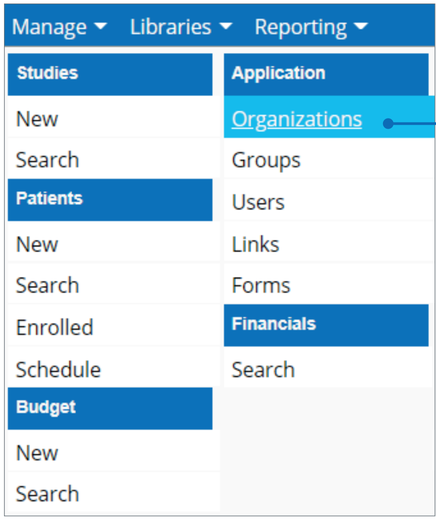
The foundation of Velos eResearch, for Enterprise customers, begins with the configuration of these account management settings. For eXpress customers, a default set of groups are included.

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.

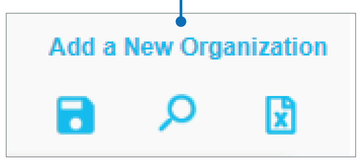
Manage Organizations

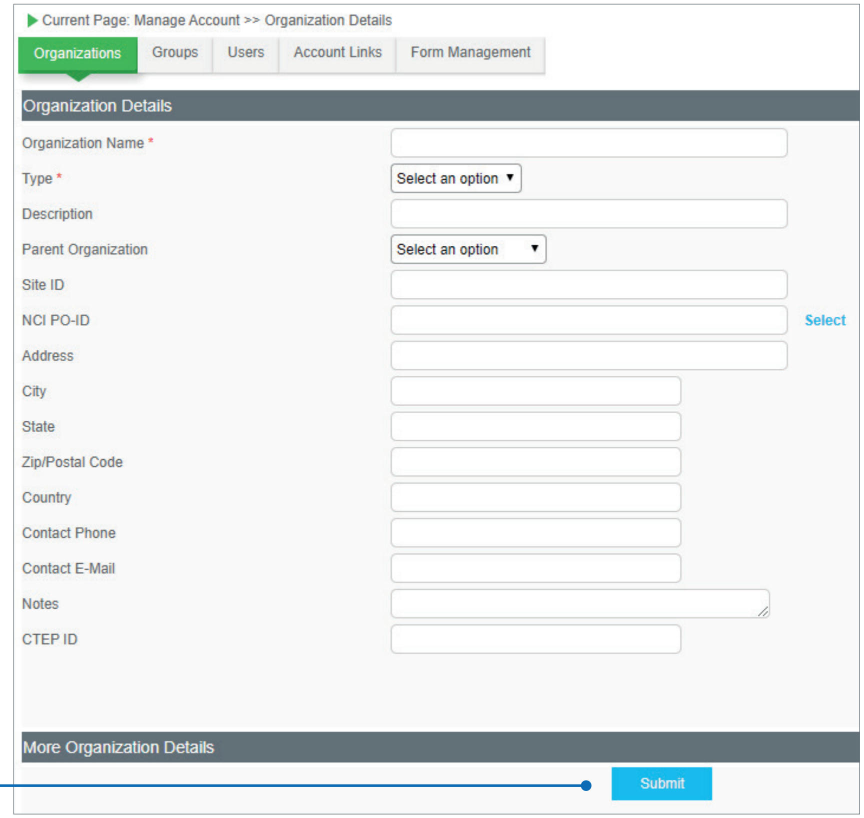


Add an Organization

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.

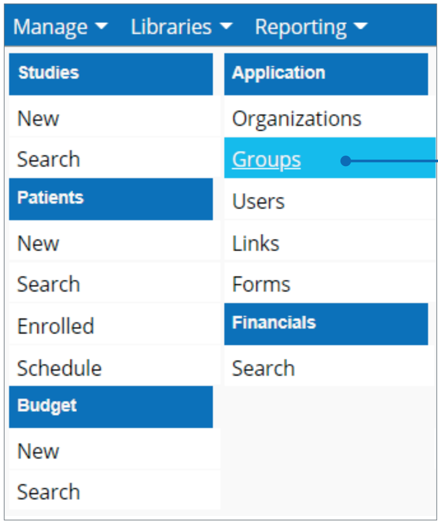




Organization Details

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.

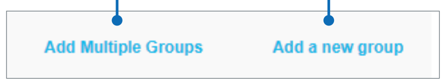
Manage Groups

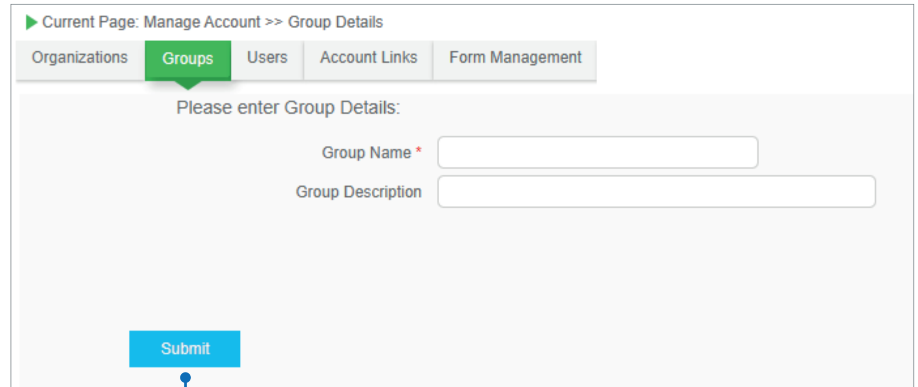


Add Groups

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

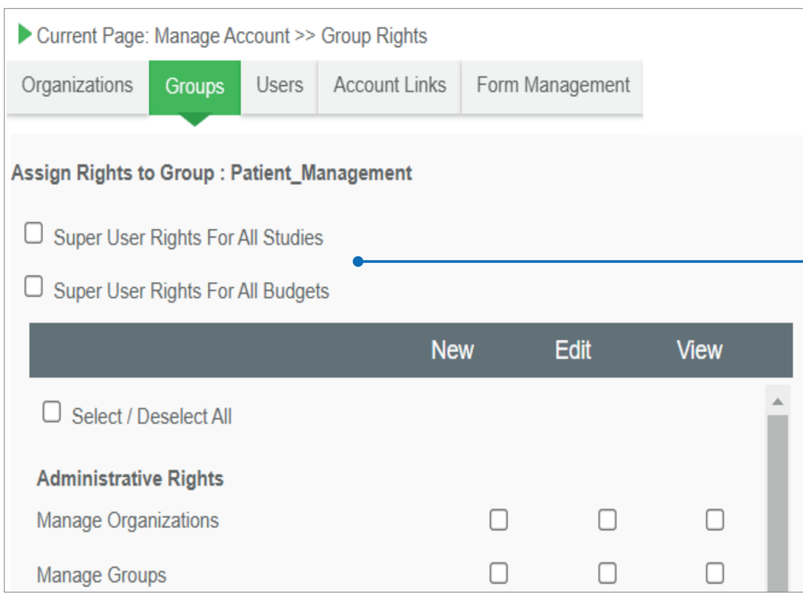
The Group Details page displays, where users can click **Add multiple groups** or **Add a new group** on the right side of the page.





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.



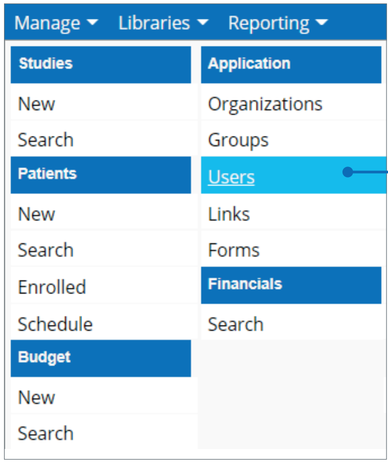
Assign Super User Rights

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.

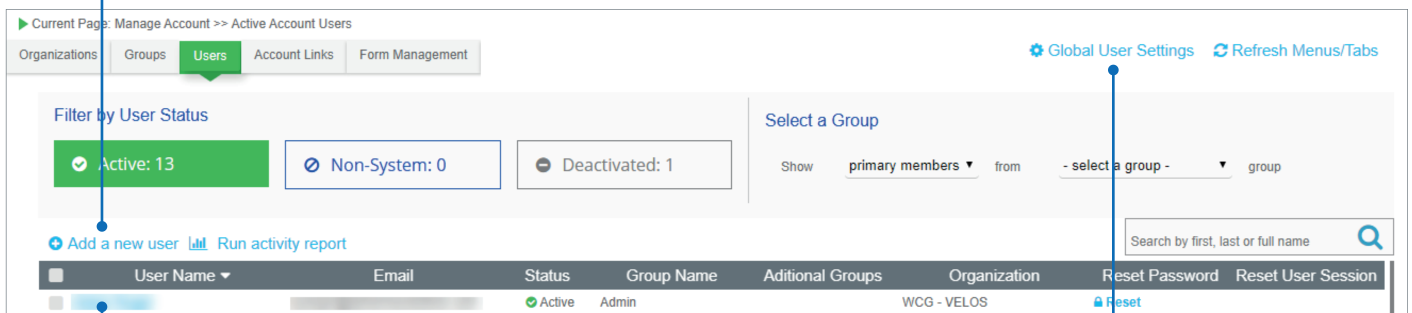
Manage Users



Active Account Users

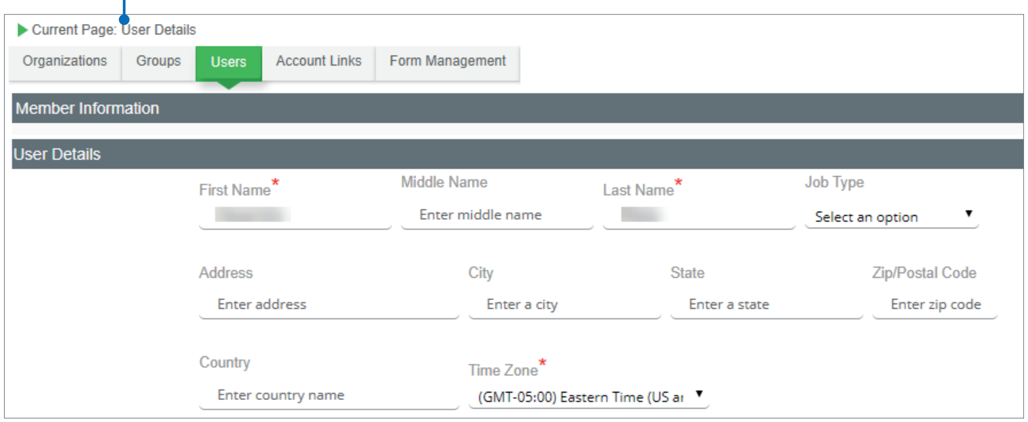
From the **Manage** drop down, select **Users** under the “Application” heading.

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.



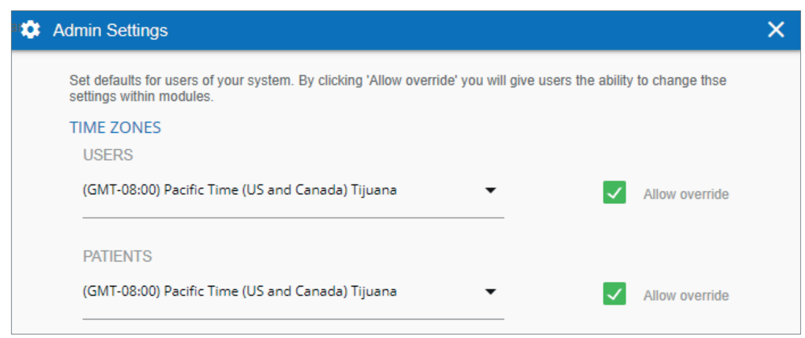
Edit Users

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

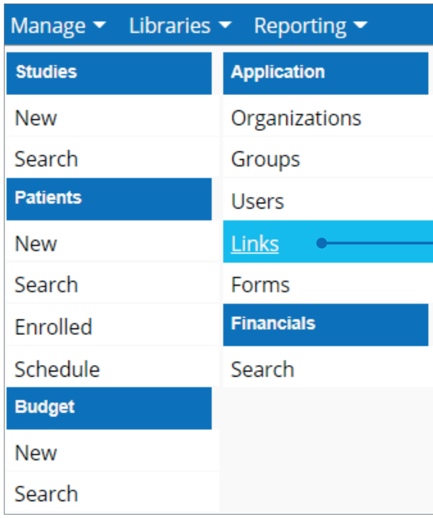


Manage Global User Settings

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.



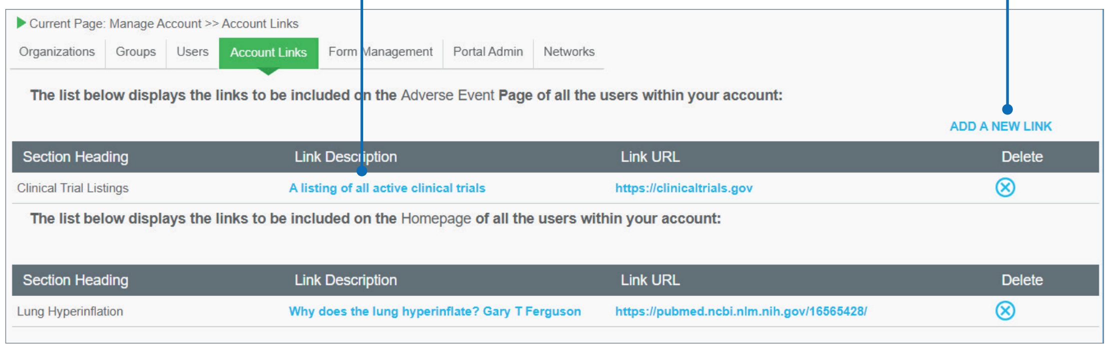
Manage Quick Links



Account Links

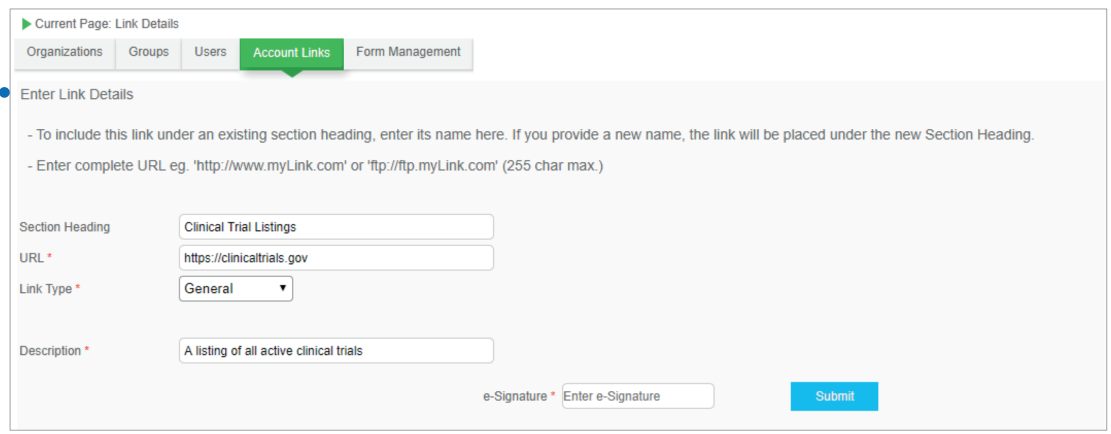
Account links provide common URL resources on the default home page or the Adverse Events page as quick links for all users and are configured by permissioned users from the Account Links page.

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**.

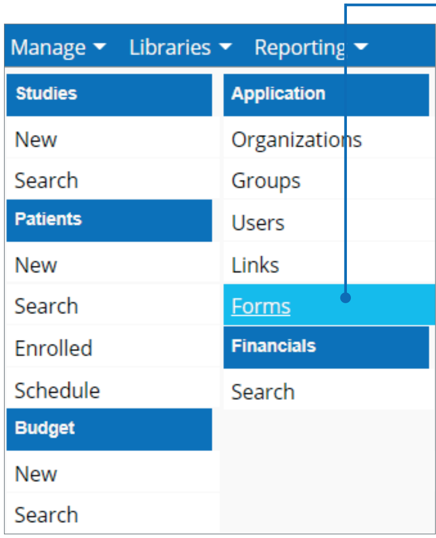


Link Details

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”.



Manage Forms

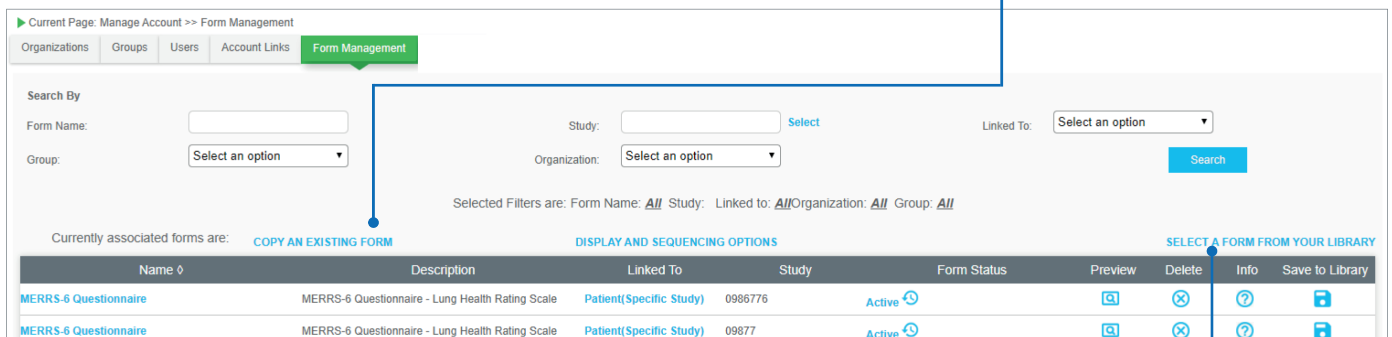


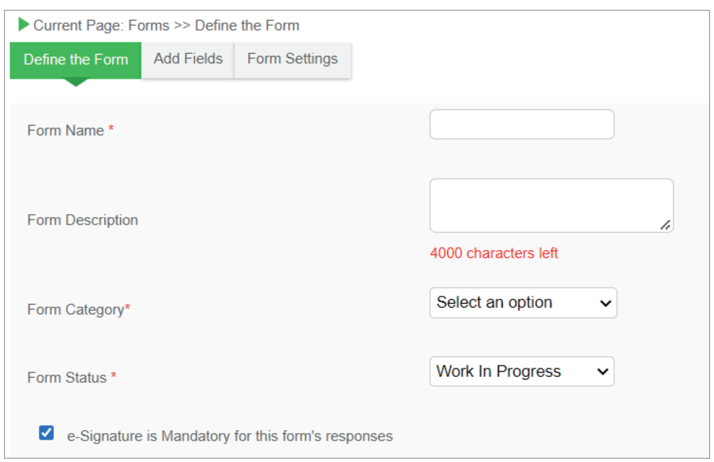
Account Forms

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

Copy an Existing Form

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





Create a New Form

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

Select a Form from Your Library

Allows you to select a form template from your form library.