

## Overview

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## Library Management

Libraries within Velos eResearch are central repositories for saved templates of Calendars, Events, Forms and Fields. The Library is therefore a powerful tool that provides permissioned users the ability to reuse standard items that are deployed across studies.

Library	Description
Events	This library is used to create events, which are specific, billable or actionable items that are used to build/define calendars, and then are stored as templates. See Charge Masters in the eResearch User Guide for more information.
Calendars	This library is used to create calendars, which are a time-defined set of events that can be applied to various functions within Velos eResearch, and then are stored as templates.
Fields	This library is used to house fields commonly used in forms. By creating and storing fields in the field library, it allows users to select fields to build a form.
Forms	This library is used to create form templates and store them. Form templates can be associated to an account, study, study patient, or patient level, and other levels depending on your configuration. After a template has been associated, it can be modified, if needed.

## Navigation

Every section used in Library Management can be accessed by clicking **Libraries** on the default homepage and navigating to any of the links under the subheadings.

## Recommended Order of Library Management

- Events must be created before Calendars.
- Fields must be created before Forms.

**Manage Event Categories and Events**

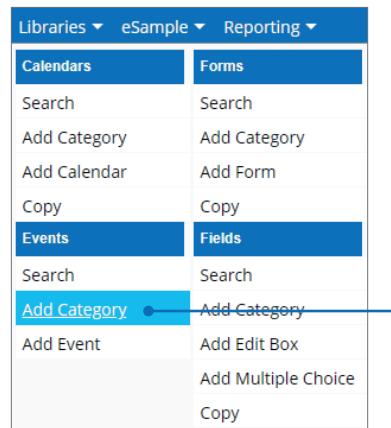
**Manage Calendar Categories and Events**

**Manage Field Categories and Fields**

**Manage Form Categories and Forms**



The Events Library houses an institution's charge master for those who have one. The items in the charge master are listed as events including information such as cost or CPT codes.



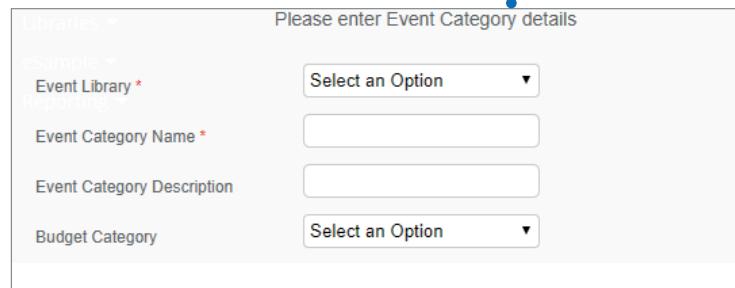
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Calendars	Forms
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Add Calendar	Add Form
Copy	Copy
<b>Events</b>	<b>Fields</b>
Search	Search
<b>Add Category</b>	<b>Add Category</b>
Add Event	Add Edit Box
	Add Multiple Choice
	Copy

## Add an Event Category

Within each event library, events are given a category. Before creating an event, at least one event category must be established. From the **Libraries** tab, select **Add Category** under the "Events" heading.

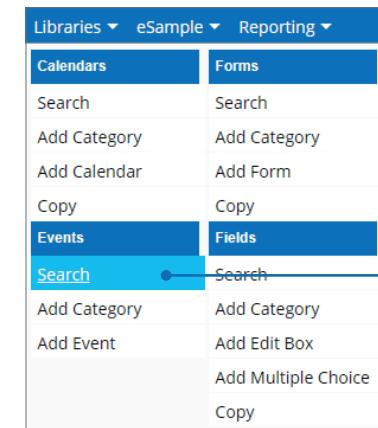
If a charge master is not uploaded, categories must be created before creating events.



Please enter Event Category details

Event Library *	Select an Option
Event Category Name *	<input type="text"/>
Event Category Description	<input type="text"/>
Budget Category	Select an Option

Enter the necessary information on the Event Category details page. The specified Budget Category for an Event Category will apply to all events under that category when the calendar is part of a budget.



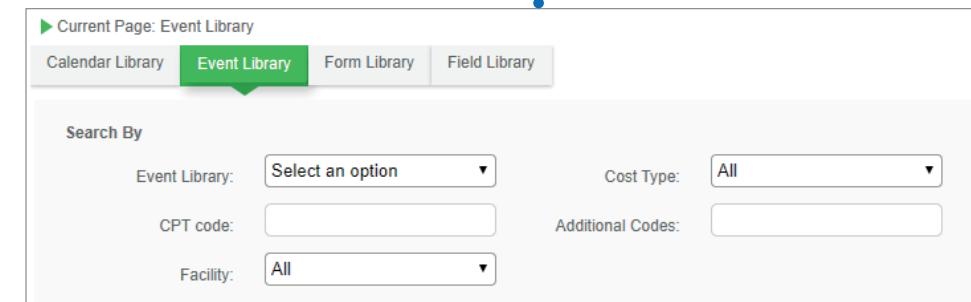
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Calendars	Forms
Search	Search
Add Category	Add Category
Add Calendar	Add Form
Copy	Copy
<b>Events</b>	<b>Fields</b>
<b>Search</b>	<b>Search</b>
Add Category	Add Category
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	Copy

## Search Event Library

From the **Libraries** tab, select **Search** under the "Events" heading.

The **Event Search** field displays. **Search** for an event prior to adding a new event. An Event Library must be selected prior to searching for an event in the system for results to display.



Current Page: Event Library

Calendar Library Event Library Form Library Field Library

Search By

Event Library:	Select an option	Cost Type:	All
CPT code:	<input type="text"/>	Additional Codes:	<input type="text"/>
Facility:	All		

## Events Library (*continued*)

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Add Category	Add Category
Add Calendar	Add Form
Copy	Copy
<b>Events</b>	<b>Fields</b>
Search	Search
Add Category	Add Category
<b>Add Event</b>	<b>Add Edit Box</b>
	Add Multiple Choice
	Copy

► Current Page: Event Details Page

<b>Event Detail</b>	Message	Cost	Appendix	Resource	CRF Details
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**Event Details**

Event Library \*

Select Event Category \*

### Add an Event

If no charge master was uploaded, or the required event is not already in the system, users can manually add events to the event library. To add an event, from the **Libraries** tab, select **Add Event** under the “Events” heading.

Tab	Description
Event Detail	Define the event by establishing the Event Library, Event Category, Event Name, etc.
Message	Enter a message for a generated auto-notification for patients and system users. This is used for Study Management and is not recommended for Library Management tasks.
Cost	Enter a specified cost to associate with an event.
Appendix	Add, Edit, or Delete reference materials to an event.
Resource	Add personnel resource information and specific system users to an event. This is used for Study Management and is not recommended for Library Management tasks.
CRF Details	Add case report form information to an event. This is used for Study Management and is not recommended for Library Management tasks.



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Calendars	Forms
Search	Search
<b>Add Category</b>	<b>Add Category</b>
Add Calendar	Add Form
Copy	Copy
<b>Events</b>	<b>Fields</b>
Search	Search
Add Category	Add Category
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	Add Multiple Choice
	Copy

## Add a Calendar Category

From the **Libraries** tab, select **Add Category** under the "Calendars" heading.

Enter a category name and description on the Calendar Category details page.

Calendar Library >> Calendar Category

Please enter the following Calendar Category details

Calendar Category *	<input type="text"/>
Category Description	<input type="text"/>
e-Signature *	<input type="text"/> Enter e-Signature
<b>Submit</b>	

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Calendars	Forms
<b>Search</b>	Search
Add Category	Add Category
Add Calendar	Add Form
Copy	Copy
<b>Events</b>	<b>Fields</b>
Search	Search
Add Category	Add Category
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	Copy

## Search the Calendar Library

From the **Libraries** tab, select **Search** under the "Calendars" heading.

Enter your search criteria in the available search fields. Search the calendar library prior to adding a calendar to see if a similar calendar already exists.

▶ Current Page: Calendar Library

Calendar Library Event Library Form Library Field Library

Search By

Calendar Name:  Category: **Select an option** **Search**

Library Calendars: 

Calendar Category ▾	Calendar Name	Description	Status	Shared with	Reports	Export	Delete
Administrative Calendar for PhagePharm	Administrative Calendar	-	Work in Progress	All Account Users	 	 	
	Administrative Calendar for PhagePharm	-	Work in Progress	All Account Users	 	 	

**Define the Calendar** **Select Events** **Manage Visits** **Event-Visit Grid** **Coverage Analysis** **Patient Cost Items**

## Manage a Calendar

Select a calendar name from the Calendar Library, then use the calendar tabs to define or manage the calendar. At the Library Management level, it is recommended that users only complete the Select Events tab and add standard events. The ability to configure patient costs using the Patient Cost Items tab is only available in Velos eResearch Enterprise.



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	Copy		

## Add a Field Category

Fields can be organized by categories. Before creating a field, at least one field category must first be established. For example, you might organize your fields by specific types of data, such as Date Fields, Demographics, or Medical History.

To add a Field Category, from the **Libraries** tab, select **Add Category** under the "Fields" heading.

## Category Details

In the Field Library Category page, enter the necessary information. Enter your e-Signature and click **Submit**.

Field Library >> Category

Please enter the following Category details

Category Name \*

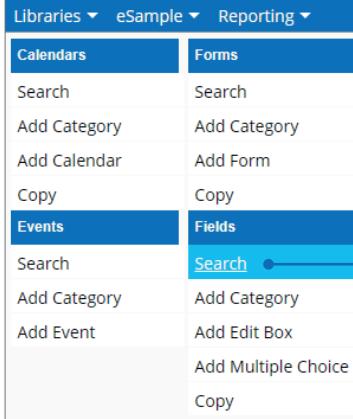
Category Description

e-Signature \*

Enter e-Signature

Submit

## Fields Library (continued)

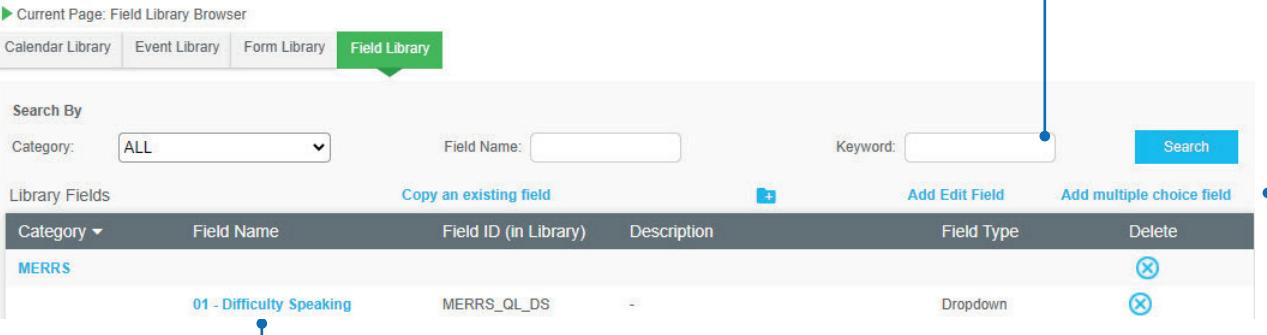


**Search the Field Library**

Before adding a new field, you should search the field library to see if there is a similar field that already exists.

From the **Libraries** tab, select **Search** under the “Fields” heading.

Use the search fields to search the Field Library.

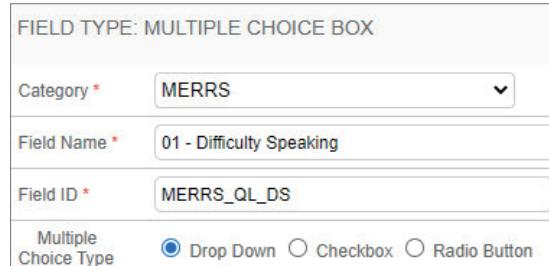


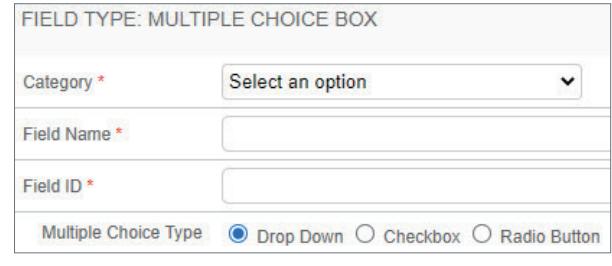
**Manage Fields**

From the field search display, select a **Field Name** to open the Field Edit Box.

**Add Fields**

From the Field Library, select **Add Edit Field** or **Add Multiple Choice Field**.







Libraries		eSample	Reporting
Calendars	Forms	Search	
Search	Search	Add Category	
Add Category	Add Category	Add Calendar	
Add Calendar	Add Form	Copy	
Copy	Copy	Events	
Events	Fields	Search	Search
Search	Search	Add Category	
Add Category	Add Category	Add Event	
Add Event	Add Edit Box	Add Multiple Choice	
		Copy	Copy

## Form Library

From the Libraries tab, select **Search** under the "Forms" heading.

The Form Library tab displays where users can search, modify an existing form by selecting the Name, copy an existing form, or create a new form.

## Search the Form Library

Before adding a new form, search the form library to see if there is a similar form that already exists.

## Define the Form

Enter the Form Name, Form Category, and Form Status. It is recommended that users keep the status "Work in Progress".

Current Page: Form Library

Calendar Library	Event Library	Form Library	Field Library
Search By	Form Name: <input type="text"/>	Form Category: <input type="button" value="ALL"/>	<input type="button" value="Search"/>
Library Forms	<input style="float: left; margin-right: 10px;" type="button" value="+"/> <input style="float: left; margin-right: 10px;" type="button" value="Copy an existing form"/> <input style="float: left;" type="button" value="Create a new form"/>		
Form Category	Name	Description	Status
Administrative for PhagePharm	Administrative for PhagePharm	Administrative for PhagePharm	Work In Progress
		Shared with: All Account Users	<input type="button" value=""/>
		<input type="button" value=""/>	<input type="button" value=""/>
		<input type="button" value=""/>	<input type="button" value=""/>

Current Page: Forms >> Define the Form

Define the Form	Add Fields	Form Settings
Form Name * <input type="text"/> Form Description <input type="text"/> 4000 characters left. Form Category* <input type="button" value="Select an option"/> Form Status* <input type="button" value="Work In Progress"/> <input checked="" type="checkbox"/> e-Signature is Mandatory for this form's responses e-Signature * <input type="text"/>		<input type="button" value="Submit"/>
<a href="#">Back to the Form Library</a>		

## Create a New Form

To create a new form, from the Form Library page, click the **Create a New Form** link.

Libraries		Reporting
Calendars	Forms	Search
Search	Add Category	Add Category
Add Category	Add Calendar	Add Form
Add Calendar	Copy	Copy
Copy	Events	Events
Events	Fields	Fields
Search	Search	Search
Add Category	Add Category	Add Category
Add Event	Add Edit Box	Add Edit Box
	Add Multiple Choice	Add Multiple Choice
	Copy	Copy

Forms Library (*continued*)

Libraries ▾ Reporting ▾	
Calendars	Forms
Search	Search
Add Category	<b>Add Category</b>
Add Calendar	Add Form
Copy	Copy
Events	Fields
Search	Search
Add Category	Add Category
Add Event	Add Edit Box
	Add Multiple Choice
	Copy

## Add a Form Category

Forms are data-entry points for key study, patient, and administrative functions. Forms are organized by categories. Check if there is an existing category prior to adding one. From the Libraries tab, select **Add Category** under the "Forms" heading.

## Form Library &gt;&gt; Form Category

Please enter the following Form Category details

Form Category \*

Category Description

e-Signature \*

Enter e-Signature

Submit

## Form Category Details

In the Form Category details page, enter the category name and description, then click **Submit**.