

## Overview

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

## 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

## Events Library

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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### 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

Libraries ▾ eSample ▾

Event Library \*

Event Category Name \*

Event Category Description

Budget Category

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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### 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:  Cost Type:

CPT code:  Additional Codes:

Facility:

## Events Library *(continued)*

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Calendars	Forms
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### 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.

► Current Page: Event Details Page

Event Detail Message Cost Appendix Resource CRF Details

**Event Details**

Event Library \*

Select Event Category \*

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.

## Calendar Library

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

Category Description

e-Signature \*

### Create a New Calendar

Click **Create a New Calendar** on the top right of the Calendar Library page.

Libraries ▾	eSample ▾	Reporting ▾
<b>Calendars</b>	<b>Forms</b>	
<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	
Add Event	Add Edit Box	
	Add Multiple Choice	
	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:

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	Schedule		
	Administrative Calendar for PhagePharm		Work in Progress	All Account Users	Schedule		

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.

## Fields Library

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### 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)

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### 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.

Current Page: Field Library Browser

Calendar Library Event Library Form Library **Field Library**

Search By

Category: ALL ▾ Field Name:  Keyword:  Search

Library Fields Copy an existing field + Add Edit Field Add multiple choice field

Category ▾	Field Name	Field ID (in Library)	Description	Field Type	Delete
MERRS	01 - Difficulty Speaking	MERRS_QL_DS		Dropdown	<span>ⓧ</span>

### Add Fields

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

### Manage Fields

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

FIELD TYPE: MULTIPLE CHOICE BOX

Category \* MERRS ▾

Field Name \* 01 - Difficulty Speaking

Field ID \* MERRS\_QL\_DS

Multiple Choice Type ☒ Drop Down ☐ Checkbox ☐ Radio Button

FIELD TYPE: MULTIPLE CHOICE BOX

Category \* Select an option ▾

Field Name \*

Field ID \*

Multiple Choice Type ☒ Drop Down ☐ Checkbox ☐ Radio Button

## Forms Library

Libraries ▾ eSample ▾ Reporting ▾	
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Search	<a href="#">Search</a>
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### 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.

Current Page: Form Library

Calendar Library Event Library **Form Library** Field Library

Search By

Form Name:  Form Category: **ALL**

Library Forms 4 [Copy an existing form](#) [Create a new form](#)

Form Category ▾	Name	Description	Status	Shared with	Preview	Delete	Info
<a href="#">Administrative for PhagePharm</a>	<a href="#">Administrative for PhagePharm</a>	Administrative for PhagePharm	Work In Progress	All Account Users			

### 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: Forms >> Define the Form

**Define the Form** Add Fields Form Settings

Form Name \*

Form Description  4000 characters left

Form Category\* **Select an option** ▾

Form Status \* **Work In Progress** ▾

☒ e-Signature is Mandatory for this form's responses

e-Signature \*

[Back to the Form Library](#)

### Create a New Form

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

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## Forms Library *(continued)*

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### 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 >> 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**.