Protocol Builder[®] Administrator Features

Key Features

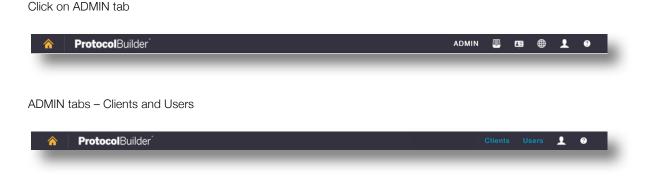
Protocol Builder provides administrators the ability to manage key aspects of the platform:

- Update account information
- **Establish output branding and confidentiality statement**
- Manage users
- Manage Home Page messaging
- Create reports

Accessing the ADMIN function

Protocol Builder can provide administrator access to a select group of users at the client institution – we call this role "PB Administrator". PB Administrators typically reside in a research administration or education/training function.

PB Administrators will see the ADMIN tab in the global navigation where they can access the Client Profile Page and the Users Page.



Clients Page

PB Administrators will one line for the account with the account summary. Click on "EDIT" to see the profile details, or click "USERS" to see the Users Page.

Clients								
Client Name 🔺	Status	Туре	Payment	Start	End	Users	Protocols	
Children's National	Active	Institutional	Check	09/27/2016	09/26/2018	63	57	EDIT I USERS

Visit www.protocolbuilderpro.com or call (646) 791-6178 to request a demo.

Client Profile Page

The Client Set Up page contains the client profile. PB Administrators can view and/or make changes within the following profile tabs:

- Client set up view account start and end date and payment status
- **Billing Address** view billing address and invoice recipient
- **Contact Information** account admin account information
- **Branding** add your institution's logo to all protocols
- Legal add a standard confidentiality statement to all protocols, add institution-specific messages to the Protocol Builder home page (only visible to the users on the account)
- User list upload Add groups of new users using a csv file upload

lient set-up *	Client Name *		Branding Ta
lling Address	Clinical Research University		
ontact Information	Job Name	Client set-up *	Logo
ales	JUD Hame	Billing Address	The second secon
anding		Contact Information	Header Text
igal	User Limit	Branding	
ser list upload	0	Legal User list upload	
	Protocol Limit	oser hist optoad	
	0	Save Delete	
	Start Date		O and densities it and IDD Massacras T
	09/27/2017		Confidentiality and IRB Messages Ta
	E.g., 10/04/2017		
	End Date	Client set-up *	Confidentiality Statement
	09/27/2020	Billing Address	Enter the institution's standard confidentiality statement in the box below. It will appear on the cover page of all protocols. If you don't have a confidentiality statement, you can copy and paste this sample and revise it to fit your needs:
	E.g., 10/04/2017	Contact Information	This document is confidential and proprietary to [INSERT INSTITUTION NAME] and its affiliates. Acceptance of this document constitutes agreement by the
	Method of Payment	Branding	recipient that no unpublished information contained herein will be reproduced, published, or otherwise disseminated or disclosed without prior written approval of [INSERT INSTITUTION NAME] or its affiliates, except that this document may be disclosed in any medium to appropriate clinical investigators, Institutional Review
	o Check	Legal	Boards, and others directly involved in the clinical investigation that is the subject of this information under the condition that they keep the information strictly
	○ EFT/ACH	User list upload	confidential.
	⊖ Credit Card		B / 新春道田田田 田 田 田 田 田 田 田 田 田 田 田 田 田 田 田 田 田
	⊖ Trial/Demo		
	⊖ Unpaid		
	Туре		Path: p
	Institutional 👻		IRB
			Enter any special instructions and a link to your institution's IRB website in the box below. This information will appear on the home screen of all Protocol Builder users associated with your institution. If it's useful, you can copy and paste this sample and revise it to fit your needs:
	Domain Prefix		Please check with your institution's IRB website for more information about protocol policies and resources.
	Domain Preiix		B J 新喜酒園田田家様の ○ == ※ 至一 <u>水</u> == √ ==
		_	n 1 meaning www.c.mean.c
			Path: p
		Save Delete	
		L	
			User List Upload T
		1	User List Opidau T
		Client set-up *	
			List Upload
		Billing Address	Choose File in office selected Upload
		Contact Information	- Allowed file types: cav.
		Branding	Download Template
		Legal	

Users Page

Manage Users

The Users page provides PB Administrators with the ability to view and manage users:

- ▶ View, filter and sort user list
- Edit user information and access
- Add new users (manually)
- Delete users

First Name		Last Name	E-mail		Client S clinical Research University		Apply
First Name	Last Name -	Client	Department	E-mail	Status Role	Last User access since	Protocols
Winston	Church	Clinical Research University	Oncology	winston.church@	Active Writer	09/27/2017	0 EDIT I DELETE
Emily	Crusher	Clinical Research University	Orthopedics	emily.crusher@c	Active Writer	09/27/2017	0 EDIT I DELETE
Jason	Evers	Clinical Research University	Oncology	jason.ever@cru	Active Writer	09/27/2017	0 EDIT I DELETE
Kimberly	Long	Clinical Research University	Hematology	Kimberly.long@c	Active Writer	09/27/2017	0 EDIT I DELETE
Adam	MacIntosh	Clinical Research University		adam.macintosh@	. Active Writer	09/27/2017	0 EDIT I DELETE
David	Ogilvy	Clinical Research University		david.ogiivy@cr	Active Writer	09/27/2017	0 EDIT I DELETE
Vicky	Pattison	Clinical Research University		vicky.pattison@	Active Writer	09/27/2017	0 EDIT I DELETE
John	Smith	Clinical Research University		john.smith@cru	Active Writer	09/27/2017	0 EDIT I DELETE
Neill	Strong	Clinical Research University	Emergency Medicine	neil.armstrong@	Active Writer	09/27/2017	0 EDIT I DELETE
Emma	Watt	Clinical Research University		emma.watt@cru.e	Active Writer	09/27/2017	0 EDIT I

Create Reports

PB Administrators can create reports from the Users page:

- Filter list based on Status Active or Blocked users
- Click the Download button at the bottom of the page
- Open exported file (CSV format)
- Create user reports:
 - User status Active or Blocked
 - User history registration and last access
 - Protocols number of protocols by user and total
 - Organization groupings identify collaborators outside the institution
 - Departmental grouping understand usage by department

CSV	Report	Sample
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	A	В	С	D	E	F	G	н	1	J	K
1	First Name	Last Name	Client	Organization	Department	E-mail	Status	Role	Last Access	User since	Protocols
2	Winston	Church	Clinical Research University		Oncology	winston.church@cru.edu	Active	Writer		9/27/17	0
3	Emily	Crusher	Clinical Research University		Orthopedics	emily.crusher@cru.edu	Active	Writer		9/27/17	0
4	Jason	Evers	Clinical Research University		Oncology	jason.ever@cru.edu	Active	Writer		9/27/17	0
5	Kimberly	Long	Clinical Research University		Hematology	Kimberly.long@cru.edu	Active	Writer		9/27/17	0
6	Adam	MacIntosh	Clinical Research University	Cancer Research Institute		adam.macintosh@cru.edu	Active	Writer		9/27/17	0
7	David	Ogilvy	Clinical Research University	Cancer Research Institute		david.ogilvy@cru.edu	Active	Writer		9/27/17	0
8	Vicky	Pattison	Clinical Research University			vicky.pattison@cru.edu	Active	Writer		9/27/17	0
9	John	Smith	Clinical Research University			john.smith@cru.edu	Active	Writer		9/27/17	0
10	Neill	Strong	Clinical Research University		Emergency Medicine	neil.armstrong@cru.edu	Active	Writer		9/27/17	0
11	Emma	Watt	Clinical Research University			emma.watt@cru.edu	Active	Writer		9/27/17	0



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