

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.

Click on ADMIN tab



ADMIN tabs – Clients and Users



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.

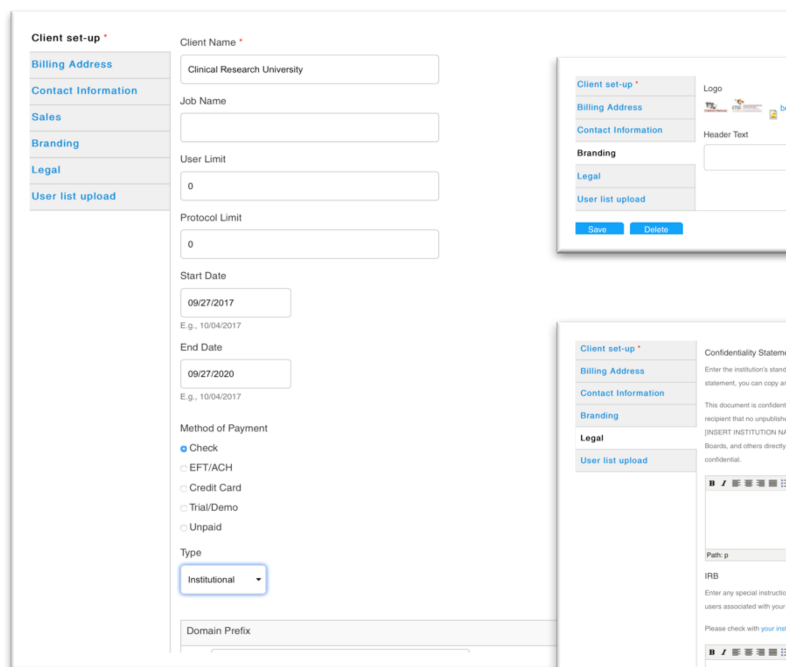
Clients								
Client Name ▲	Status	Type	Payment	Start	End	Users	Protocols	
Children's National	Active	Institutional	Check	09/27/2016	09/26/2018	63	57	EDIT USERS

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

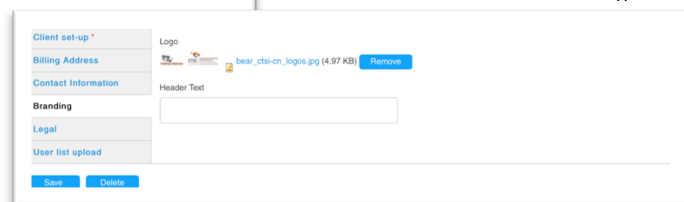
Profile Tab



The Profile Tab contains the following fields:

- Client Name ***: Text input field with value "Clinical Research University".
- Job Name**: Text input field.
- User Limit**: Text input field with value "0".
- Protocol Limit**: Text input field with value "0".
- Start Date**: Date picker with value "09/27/2017".
- End Date**: Date picker with value "09/27/2020".
- Method of Payment**: Radio button group with options: Check (selected), EFT/ACH, Credit Card, Trial/Demo, Unpaid.
- Type**: Dropdown menu with value "Institutional".
- Domain Prefix**: Text input field.

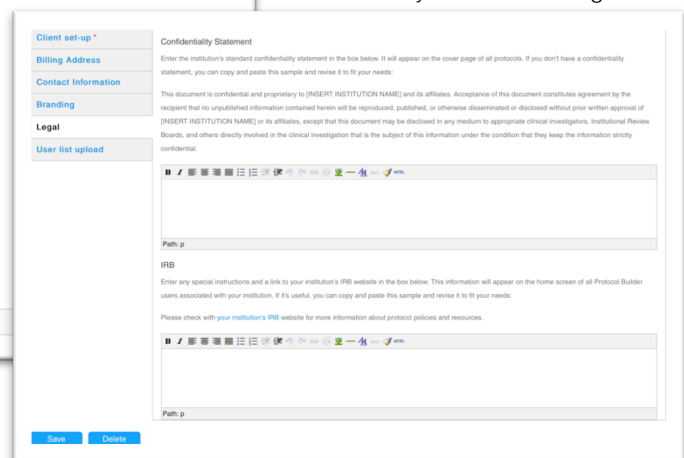
Branding Tab



The Branding Tab contains the following fields:

- Logo**: Image upload area showing "bsear_ctsi-on_logos.jpg (4.97 KB)" with a "Remove" button.
- Header Text**: Text input field.

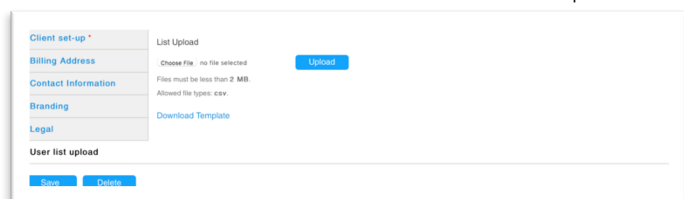
Confidentiality and IRB Messages Tab



The Confidentiality and IRB Messages Tab contains the following fields:

- Confidentiality Statement**: Text area for entering the institution's standard confidentiality statement.
- IRB**: Text area for entering special instructions and a link to the institution's IRB website.

User List Upload Tab



The User List Upload Tab contains the following fields:

- List Upload**: File upload area with a "Choose File" button, "Upload" button, and a "Download Template" link.

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

Status

clinical Research University

All Status

Apply

First Name

Last Name

Client

Department

E-mail

Status

Role

Last access

User since

Protocols

Winston	Church	Clinical Research University	Oncology	winston.church@...	Active	Writer	09/27/2017	0	EDIT DELETE
Emily	Crusher	Clinical Research University	Orthopedics	emily.crusher@c...	Active	Writer	09/27/2017	0	EDIT DELETE
Jason	Evers	Clinical Research University	Oncology	jason.ever@cru...	Active	Writer	09/27/2017	0	EDIT DELETE
Kimberly	Long	Clinical Research University	Hematology	kimberly.long@c...	Active	Writer	09/27/2017	0	EDIT DELETE
Adam	MacIntosh	Clinical Research University		adam.macintosh@...	Active	Writer	09/27/2017	0	EDIT DELETE
David	Ogilvy	Clinical Research University		david.ogilvy@cr...	Active	Writer	09/27/2017	0	EDIT DELETE
Vicky	Pattison	Clinical Research University		vicky.pattison@...	Active	Writer	09/27/2017	0	EDIT DELETE
John	Smith	Clinical Research University		john.smith@cru...	Active	Writer	09/27/2017	0	EDIT DELETE
Neill	Strong	Clinical Research University	Emergency Medicine	neil.armstrong@...	Active	Writer	09/27/2017	0	EDIT DELETE
Emma	Watt	Clinical Research University		emma.watt@cru.e...	Active	Writer	09/27/2017	0	EDIT DELETE

Download

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 departmnet

CSV Report Sample

	A	B	C	D	E	F	G	H	I	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

