

Overview

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Application	Studies
Organizations	New
Groups	Search
Users	Patients
Links	New
Forms	Search
Networks	Enrolled
Financials	Schedule
Search	Budget
	New
	Search

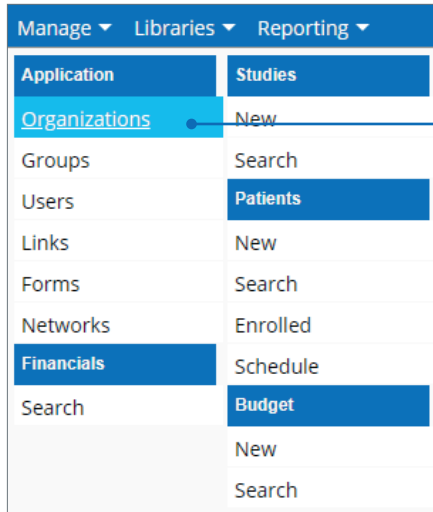
Account Management

The foundation of a Velos eResearch account begins with the configuration of the account management settings. Velos eResearch eXpress comes with a set of default groups and an Organization. The default Organization is the customer. Account Administration is managed by the Customer system-admin.

Account Management includes:

- **Organizations:** Represents an entity (Sponsor, Independent Site, Institution (Hospital/AMC) or Site of Service). Each study, user, and patient must be associated to at least one organization but can be given access to multiple.
- **Groups:** Represents the access rights within the application. The group name should identify the type of users that will be assigned to the group. The defaults group is Admin.
- **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 non-system user account is assigned an organization to associate the user to an entity. This type of user is listed in the system for information purposes and does not have access to the application.
- **Links:** Allows the site system administrator to list general resource links to Quick Links for all account users. Quick Links are listed on the default Homepage or Quick Access gadget.
- **Forms:** are associated to various entities from the account level. Forms are user-created data-entry points for key study, patient, and administrative functions. The Account Forms page allows you to delete forms, copy existing forms, or add forms from your library.

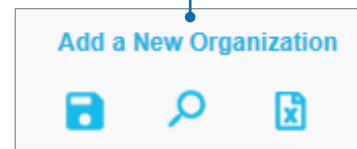
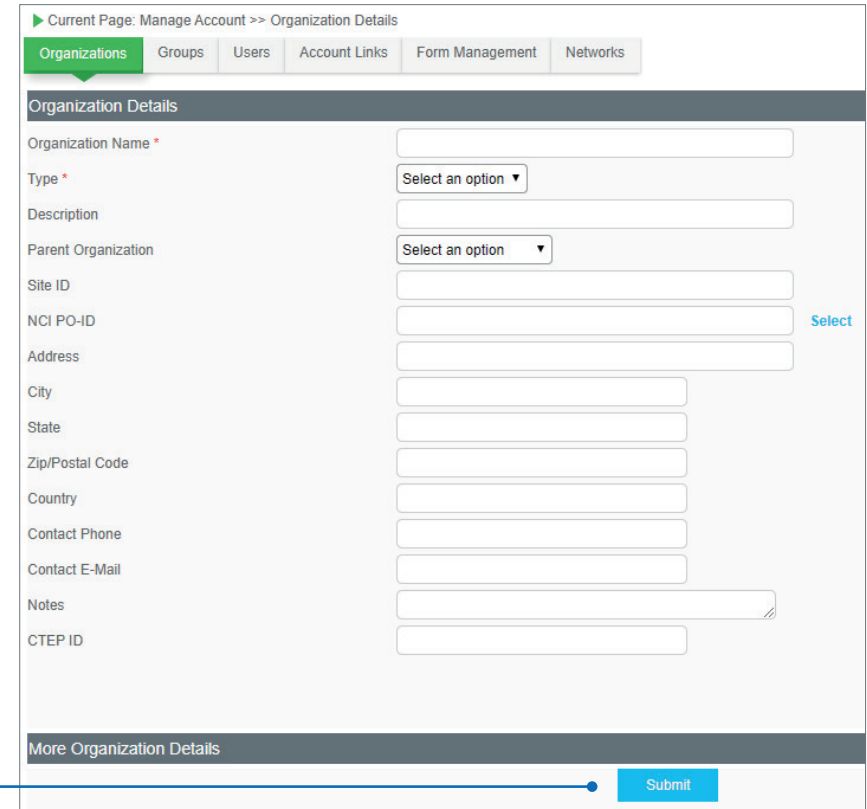
Manage Organizations



Add an Organization

From the **Manage** tab, 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.

Current Page: Manage Account >> Organization Details

Organizations Groups Users Account Links Form Management Networks

Organization Details

Organization Name *

Type *

Description

Parent Organization

Site ID

NCI PO-ID Select

Address

City

State

Zip/Postal Code

Country

Contact Phone

Contact E-Mail

Notes

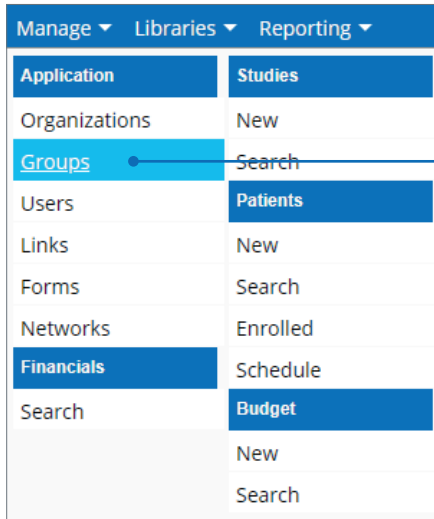
CTEP ID

More Organization Details

Organization Details

Fill in the required information, as indicated by an asterisk, and any additional information as needed in the available fields.

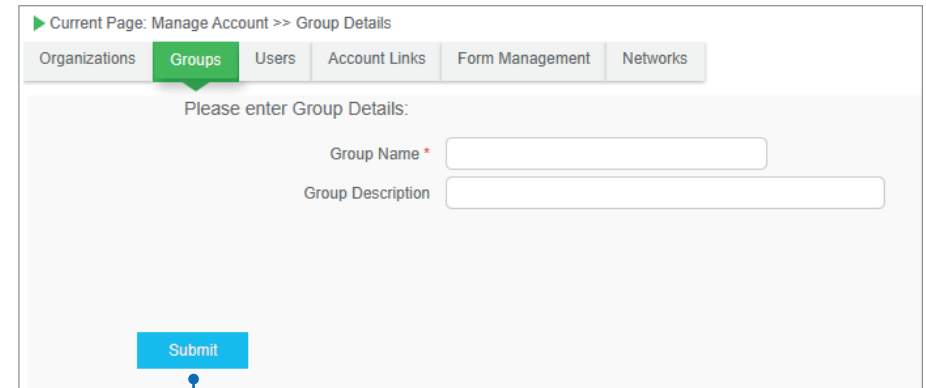
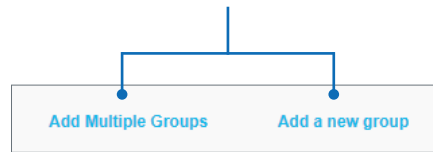
Manage Groups



Add Groups

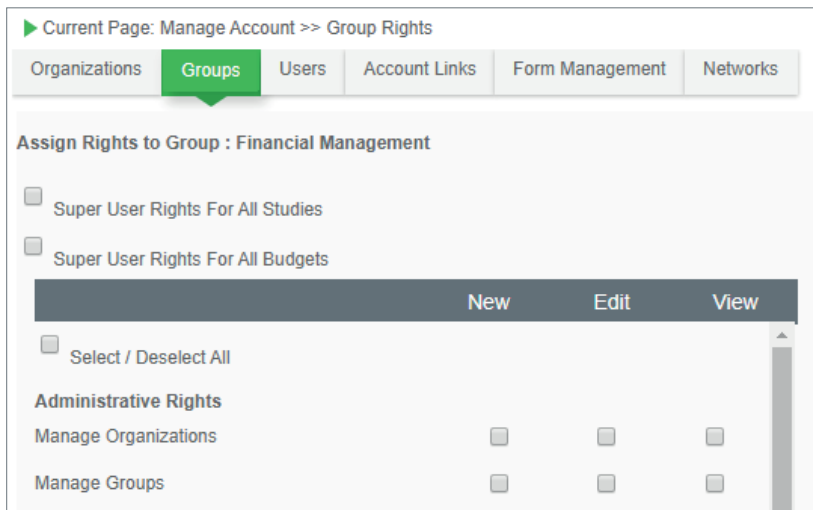
From the **Manage** tab, select **Groups** under the "Application" heading.

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.



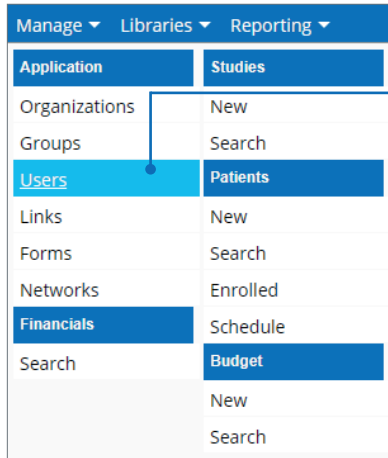
Assign Super User Rights

Super users are users with the highest level of permission in the system. From the **Group Management** page, **Super User Rights** can be assigned for a Group for All Studies or for All Budgets.

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.

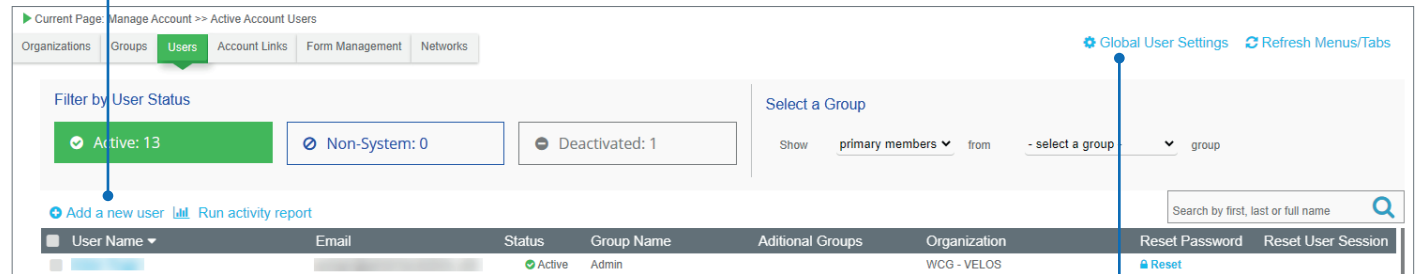
Manage Users



Active Account Users

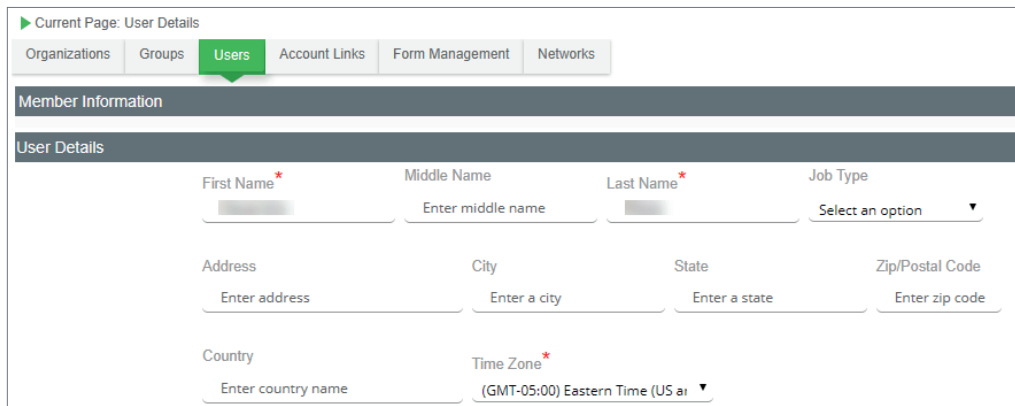
From the **Manage** tab, select **Users** under the "Application" heading.

The Active Account Users page displays, where any created users can be modified, Admins can email users, or new users can be added. Select **Add A New User** to add a new user.



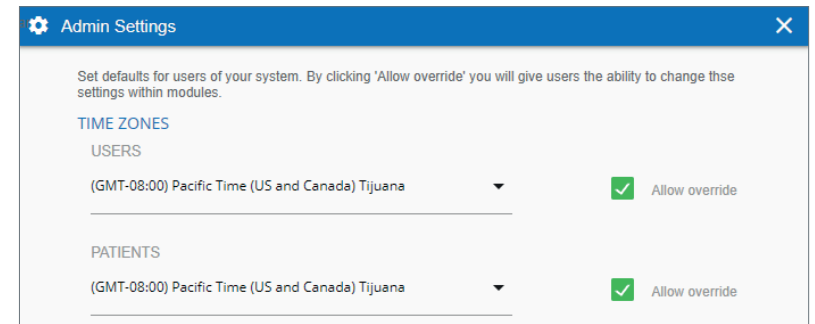
Edit Users

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



Manage User Account Settings

Click the **Admin Settings** button on the upper-right hand side of the screen. Enter or select the desired values into each available field, selecting the **Can be Overridden?** box for any settings you would like users to be able to change.



Manage Quick Links

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Search	Budget
	New
	Search

Account Links

From the **Manage** tab, select **Links** under the "Application" heading.

The Account Links page displays, where users may modify existing links by selecting the **Account Link**, or **Add A New Link**.

Current Page: Manage Account >> Account Links

Organizations Groups Users **Account Links** Form Management Networks

The list below displays the links to be included on the Homepage of all the users within your account:

[ADD A NEW LINK](#)

Section Heading	Link Description	Link URL	Delete
Clinical Trial Listings	A listing of all active clinical trials	https://clinicaltrials.gov	

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".

Current Page: Link Details

Organizations Groups Users **Account Links** Form Management Networks

Enter Link Details

- To include this link under an existing section heading, enter its name here. If you provide a new name, the link will be placed under the new Section Heading.
- Enter complete URL eg. 'http://www.myLink.com' or 'ftp://ftp.myLink.com' (255 char max.)

Section Heading:

URL *:

Link Type *:

Description *:

e-Signature *:

Manage Forms

Account Forms

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

Manage ▾ Libraries ▾ eSample ▾ Report

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Copy an Existing Form

Allows you to copy a form that is already associate at the account level.

Current Page: Manage Account >> Form Management

Organizations Groups Users Account Links **Form Management** Networks

Search By

Form Name:

Group:

Study: Select

Organization:

Linked To:

Search

Selected Filters are: Form Name: All Study: Linked to: All Organization: All Group: All

Currently associated forms are:

Name	Description	Linked To	Study	Form Status	Preview	Delete	Info	Save to Library
MERRS-6 Questionnaire	MERRS-6 Questionnaire - Lung Health Rating Scale	Patient(Specific Study)	0986776	Active				
MERRS-6 Questionnaire	MERRS-6 Questionnaire - Lung Health Rating Scale	Patient(Specific Study)	09877	Active				

Create a New Form

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

Define the Form Add Fields Form Settings

Form Name *

Form Description

4000 characters left

Form Category*

Form Status *

e-Signature is Mandatory for this form's responses

e-Signature *

Submit

Back to the Form Library

Select a Form from Your Library

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

Search a Form

Form Name

Form Category

The following are the Forms currently listed in your Library. Select Account or go to the Form Library to create a new Form.

CREATE A NEW FORM

Select	Form Name	Form Category
<input type="checkbox"/>	PANSS-6	Patient Level