

# 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	<a href="#">EDIT</a>   <a href="#">USERS</a>

# 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

Branding Tab

Confidentiality and IRB Messages Tab

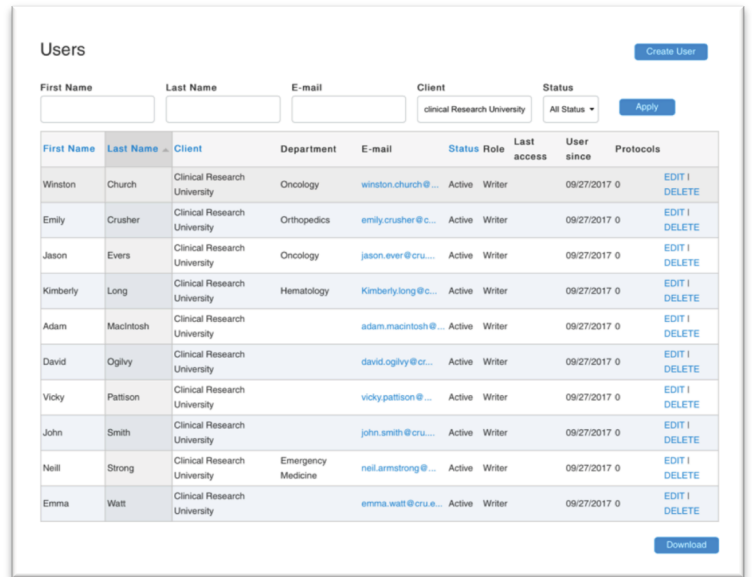
User List Upload Tab

# 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



## 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

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