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.

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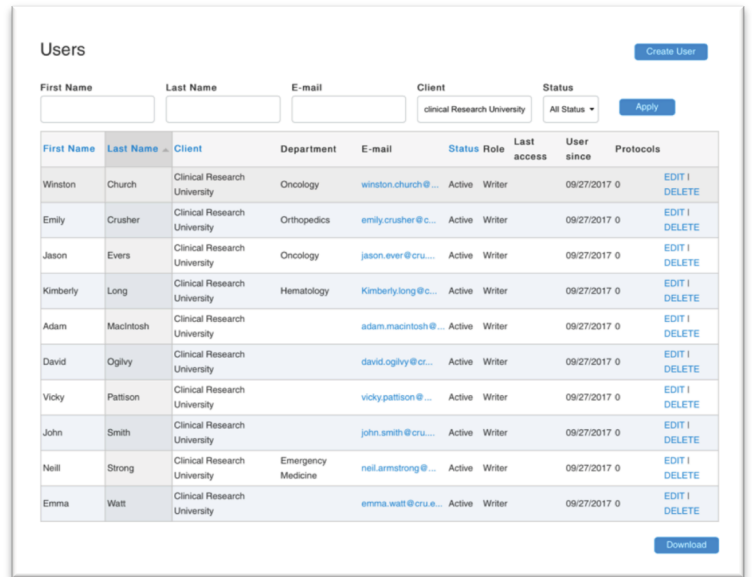
Branding Tab

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