

Florence Monitor Access Guidance

Updated February 22, 2024

To Assign Roles to a User:

1. Navigate to the 'Settings' menu in the top left corner and select 'Team Members'

CS Team		Settings	✓ Elina Huttunen ✓
Start Signing (28)	My Task Queue	reams Switch Teams	Start Tasks (9)
		 Team Members Team Notifications Team Settings 	
			Actions In-2022 @ PM EDT
		Permission Overview	ay-2022 @ PM EDT
		Tags	ar-2022 @

2. On the Manage Team Members page, select the user, click on the 'Actions' button and select 'Manage Access'



Manage Team Members: CS Team

AD	DD MEMBERS REPOR	ACTIO	NS 🕶	T	florence		
	Associated Log in(s) 🔺	-	anage Acce:		≥ss	Roles	Actions
	Catalina Villarreal catalina.villarreal@		ermission Ov	verview	oflorencehc.com	Log Signer	:
	Elina Huttunen elina.huttunen@flo	rencehc.com	elina.hu	ittunen@	aflorencehc.com	Admin, Binder Owner: o. Vaccine Trial, and 13 other(s)	
	Florence Support support@florenceł	c.com	support	t@floren	ncehc.com	Florence Support	:

3. In the Manage Access popup you can type in the role name in the search bar at the top or you can scroll through the list of roles and select the role you want to assign to the user:

Mar	nage Access for Elina Huttunen	×
Searc	n below to add a role and manage their access	
•	Search Role by name	-
	Pharmacist - Test	
T	Regulatory	
	Site Staff	
	Study Coordinator	
	Study Investigator	ſ
	Study Pharmacist	
	Study Staff	
	Team Admin	
1		
ć		CANCEL SAVE

4. Verify you selected the correct role. Note: the role is not active/turned ON yet



Manage Access for	×			
Search below to add a role and r Image: Search below to add a role and r Image: Study s Image: Search below Image: Search below Image: Search below	nanage their acc	ess		X - Bulk Assign 🚯 🚺
Role Study Investigator	Status Off On	Start	End	×
Admin	Off On	26-Jan-2022 @ 04:45 PM ES1	Never	×
Florence Admin Team Setup	Off On	11-Feb-2021 @ 04:34 PM EST	Never	×
				CANCEL SAVE

5. To make the role active, click on the 'Off/On' toggle so it turns green. This will populate the Start and End date and time to 'Now' and 'Never', respectively, by default.



Manage Access for	×			
Search below to add a role and r Search Role by name Filter list below	manage their acc	ess		• Bulk Assign (i)
Role	Status	Start	End	
Study Investigator Admin	Off On	Now 26-Jan-2022 @ 04:45 PM EST	Never	×
Florence Admin Team Setup	Off On	11-Feb-2021 @ 04:34 PM EST 11-Feb-2021 @ 04:32 PM EST	Never	×
				CANCEL SAVE

6. If desired, select a different start/end date and time by clicking in the 'Start' and 'End' fields and using the date and time pickers



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Manage	Manage Access for Elina Huttunen								×				
Q Search	to add a role and n n Role by name er list below	nanage their acc	ess								Bulk Assign	6 (•
Role		Status	Star	t					E	ind			
Study Inv	estigator	Off 🚺 On	No	W						Never		×	-
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Florence	Admin	Off 🚺 On	27 06	28 07	01 08	02 09	03 10	04 11	05 12	Never		×	1
Team Set	up	Off 🚺 On	13 20	14 21	15 22	16	17 24	18 25	19 26	Never		×	_
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g Tran	_	phong.tran@1	03 CLE	04 AR	05	00	07 TIME		09 LOSE	e Admin	CANCEL	SAV	E

7. Click Save

To Assign Users to Roles:

1. Navigate to the 'Settings' menu in the top left corner and select 'Roles'



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CS Team		Settings	Elina Huttunen 🗸
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<u>Start Signing (28)</u>	My Task Queue	 Team Members Team Notifications Team Settings 	<u>Start Tasks (9)</u>
		E Structure Templates	Adified ψ Actions
		Projects	IN-2022 @ * *
		Permission Overview	ay-2022 @
		🖁 Roles	PM EDT
		Tags	ar-2022 @

2. Once you're on the Manage Roles page, check the box next to the role you want to assign, click on the 'Actions' button and select 'Manage Access'

Manage Roles

CREAT	E ROLE	ACTIONS - T monito	r	
	Name	🔊 Audit Trail	Last Updated	Actions
	Monito	Delete	29-Dec-2021 @ 4:39 PM EDT	:
	Monito		22-Nov-2021 @ 6:35 PM EDT	:
	Monito	Amage Role Permissions	01-Mar-2021 @ 12:36 PM EDT	:
	Monito	Permission Overview	29-Dec-2021 @ 4:48 PM EDT	
		🕜 Rename		

3. In this next window, enter the name or email address of the user or users who should have this role assigned:



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Mar	nage Monitor A Access for Teammates	X
Search	n below to add a user and manage their access	
€	florence	× -
	Catalina Villarreal	
	Elina Huttunen	J
	Florence Support	
S	Kevin Carlson	
	Latoya Richards-Sturgis	
	Matija Nikolic	
	Phong Tran	
		CANCEL SAVE

4. Verify you selected the correct user. Note: the user's role is not active/turned ON yet



Manage Monitor A A	Access fo	or Teammate	ès	×
Search below to add a user and n Image: Search User by name Image: The search User by name	nanage their ac	cess		• Bulk Assign 👔 💽
User Elina Huttunen	Status Off Or	Start	End	×
		0		
				CANCEL SAVE

6. To make the role active, click on the 'Off/On' toggle so it turns green. This will populate the Start and End date and time to 'Now' and 'Never', respectively, by default. Modify if needed.



Mana	age Monitor A A	ccess for	Teammates			×
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Use	er	Status	Start	End		
🗌 Elin	na Huttunen	Off 🚺 On	Now	Never		×
					CANCEL	AVE

7. Once you have entered all your desired users and their dates, click on 'Save'

To Bulk Manage Access Dates:

- 1. Select multiple users
- 2. Activate the 'Bulk Assign' toggle



Manage Monitor A	Access fo	r Teammates		×
Search below to add a user and r Q Search User by name	nanage their ac	cess		•
Filter list below				Bulk Assign 主 🔵
User	Status	Start	End	
Catalina Villarreal	Off On			×
Florence Support	Off On			×
🗌 Elina Hu	Off 🔵 On			×
Elina Huttunen	Off 🔵 On			×
				CANCEL SAVE

3. Select the users you want to assign the role to (select all by checking the box next to 'User'), click on the Off/On toggle, and select Start and End dates if needed.



Manage Monitor A Access for Teammates								
	Search below to add a user and manage their access Q Search User by name							
Filter list below Bulk Assign ①								
	User	Status	Start	End				
	This will impact 4 user(s) selected below.	Off 💽 On	Now	Never				
	Catalina Villarreal	Off 💽 On	Now	Never	×			
	Elina Hu	Off 💽 On	Now	Never	×			
	Elina Huttunen	Off 💽 On	Now	Never	×			
	Florence Support	Off 💽 On	Now	Never	×			
				CANCEL	SAVE			

4. Click 'Save'. The role has now been activated for all the selected users with the same Start and End dates.



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Manage Monitor A	Access for	r Teammates		×
Search below to add a user and Search User by name Filter list below	manage their acc	ess		• Bulk Assign 🕄 🔵
User	Status	Start	End	
Catalina Villarreal	Off 🚺 On	23-Mar-2022 @ 07:14 PM ED]	Never	×
🗌 Elina Hu	Off 🚺 On	23-Mar-2022 @ 07:14 PM ED]	Never	×
Elina Huttunen	Off 🚺 On	23-Mar-2022 @ 07:14 PM ED]	Never	×
Florence Support	Off 🚺 On	23-Mar-2022 @ 07:14 PM ED]	Never	×
				CANCEL SAVE



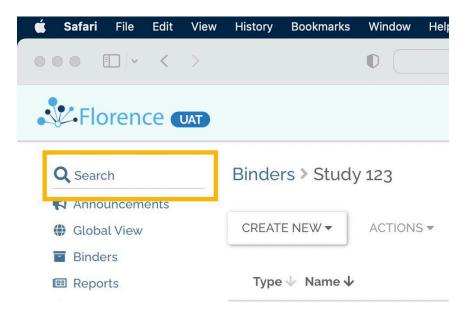
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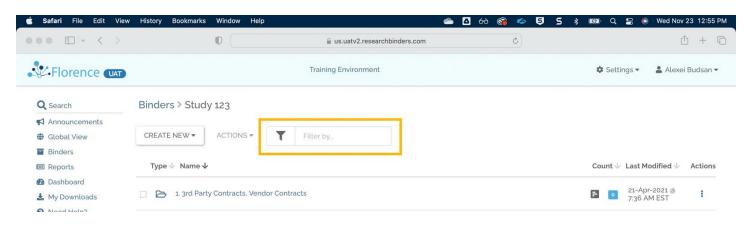
Navigation

The Monitor menu is available on individual documents only. Documents can be found inside the available Binders and Folders within your Team.

To search for a specific document, enter its name in the Search Bar in the top left of the eBinders screen:



You can also filter your view by typing the name of the folder or binder you're looking for.





Don't see your Study?

Contact your Team's Administrator so they can grant you access to the study you need.

Document View

Once you've found the document you're looking for, you should see the Monitor menu at the top of the document, next to the Manage menu and Version. Under the Monitor menu, you have two options (*three if Review is enabled*).

Review if document is under review (optional feature)*

Approve if document meets requirements

Create Query if you have any questions/issues for the site to resolve.

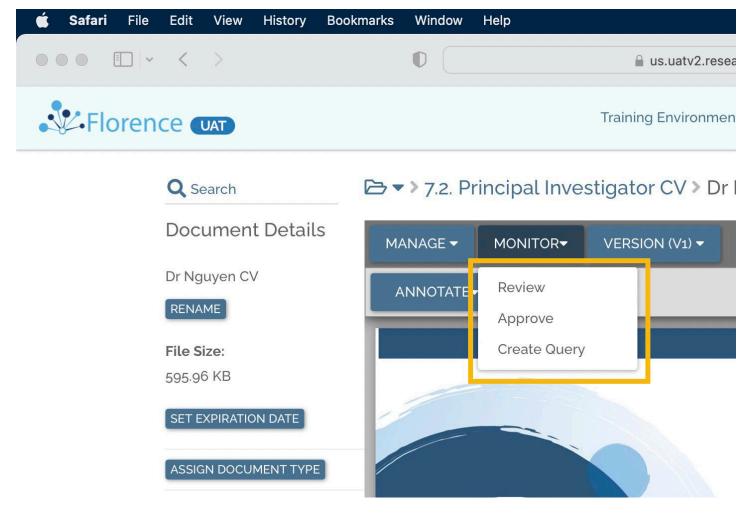
*To enable this feature (permission-driven access), please see your Team's Admin.



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Click to zoom or rotate using the arrow icon on the top right of the document for better visibility.

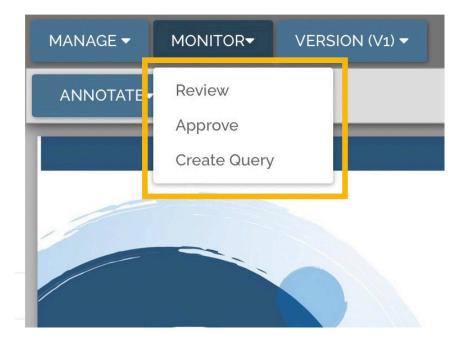
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GWU OCR Guidance Document: Florence Monitor Access Guidance 22FEB2024



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Next, either Mark as Approve, Create Query, or Mark as Review (if available).



Approve - If you're happy with the document, click Approve from the menu, and then the Approve button within the popup window, you're done!



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Create Query - If you have questions, click Create Query from the menu. In the popup window, confirm the Organization and Protocol, add comments and click the Save button - wait for Site's response.



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Review - Let others know it has been reviewed (if enabled). Click Review from the menu and within the popup window, click the Review button.



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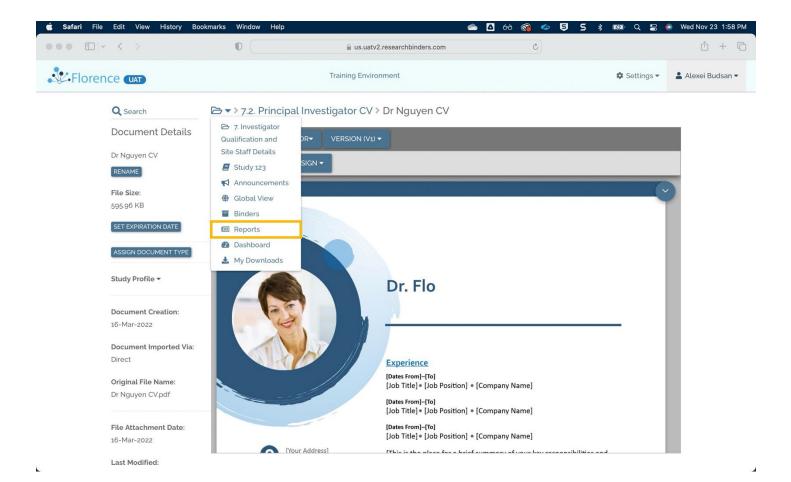
Query Follow up

Check for updates. From the Reports section, using the dropdown menu, select the Monitor Reviews - Open Query report.

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If Last Modified by lists a Site's user, click on the Document Name so you can read the Site's response.

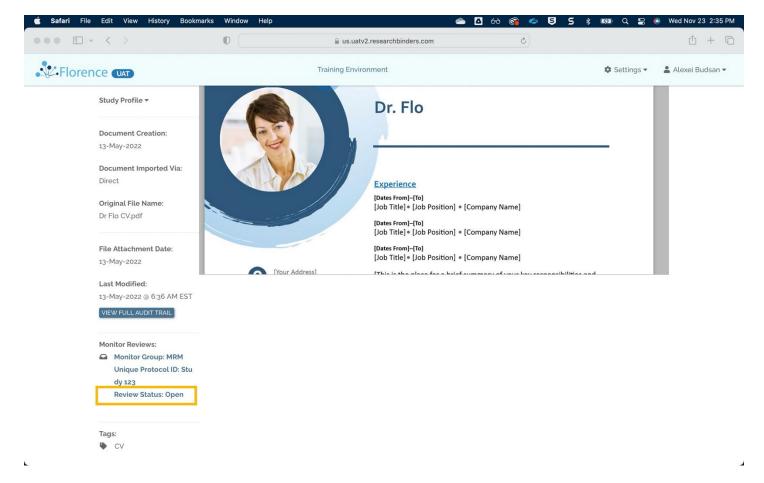
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Click on the text below the Monitor Review section to display the Query window.

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Review the Site's response in the History & Comments section.



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If you need further information, add a Comment and click Save.

If the response is satisfactory:

Click Close Query (tab next to Open Query) and click Save.



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You can then Approve the document (from Monitor menu > Approve).

The document will appear in the Monitor Reviews - Approved and Reviewed report

MRM - Email Notification

Email notifications are available for:

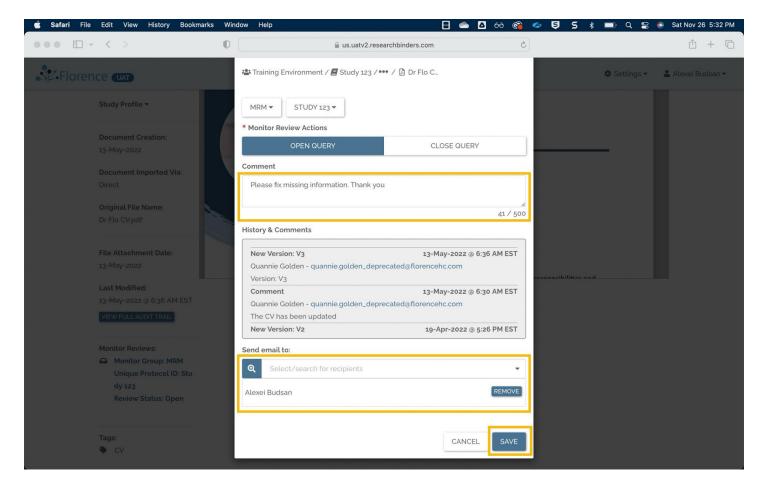
- Open Query
- Closed Query
- Reviewed (if enabled marks document as reviewed and closes any open query)
- Approved
- Comment

To send an email, select the team member(s) you would like to notify, enter any comments, and click Save.

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*Note: You can only select members with proper permissions and access to the Monitor Group (Organization). If a user does not appear in the search, it is indicating that they do not have the proper permissions enabled within their role.



Hi Alexei Buds	
	has added a comment on team Training Environment for
Document: Comment:	Dr Flo CV Please fix missing information. Thank you
	View Query

Monitor Review also has visual icons in both the global view and document view.

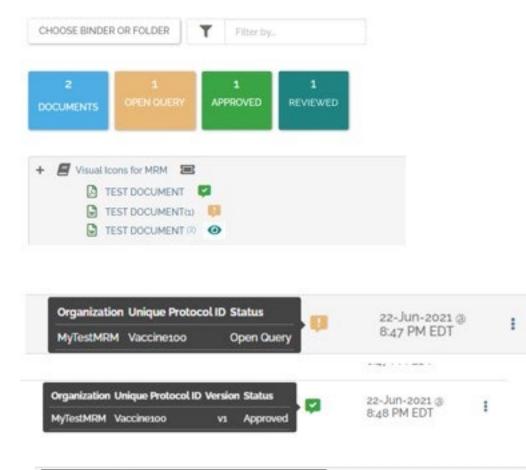
- A green check indicates the document has been approved
- A gold exclamation point indicates there is an open query
- An eye icon indicates the document is being reviewed
- These will only be displayed for users with the appropriate permissions and access.



Global View > Visual Icons for MRM

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Monitor Group	Unique Protocol ID	Version	Status	16-Mar-2022 @	:
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