

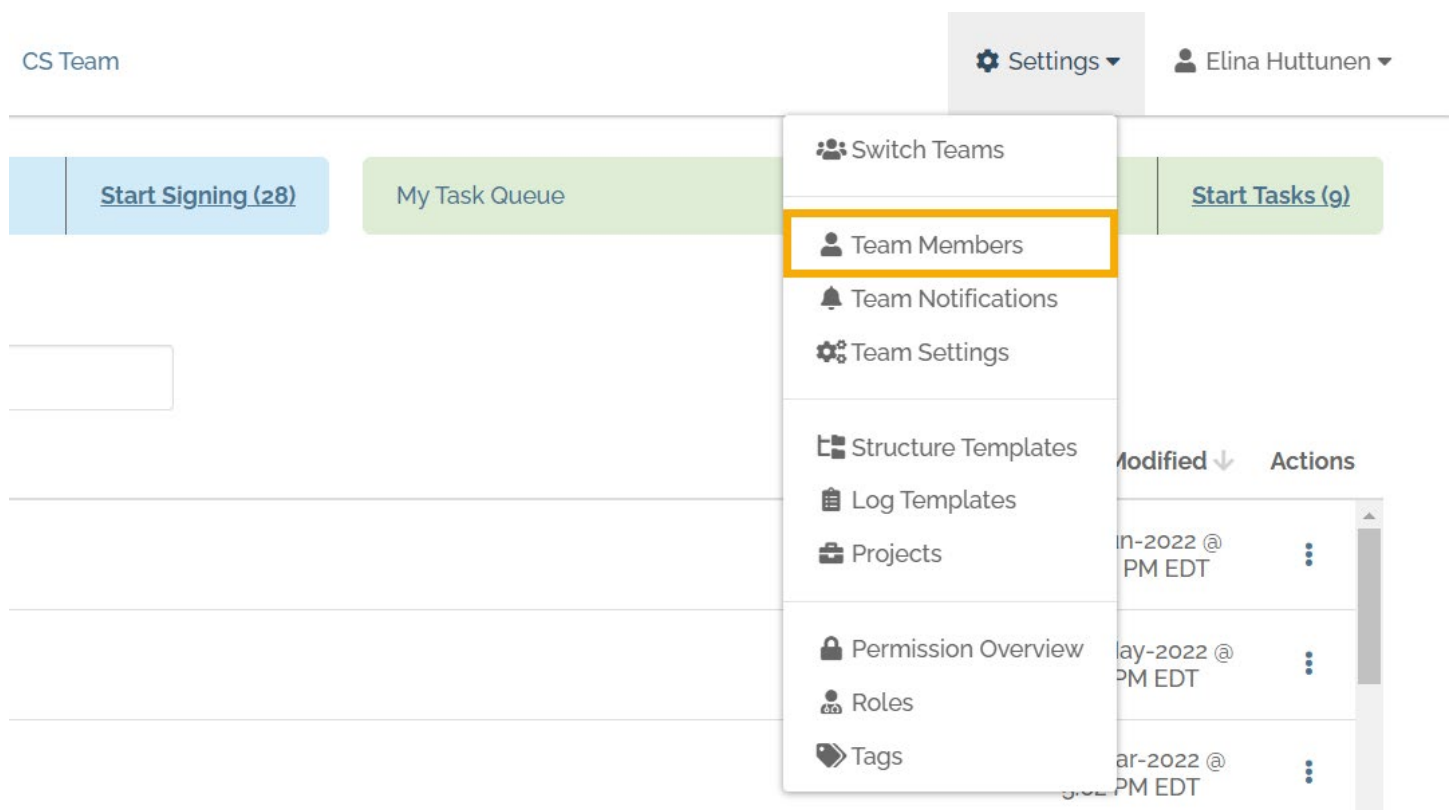


Florence Monitor Access Guidance

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'



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



Manage Team Members: CS Team

Associated Log in(s) ▲	Manage Access	Permission Overview	Roles	Actions
<input type="checkbox"/> Catalina Villarreal catalina.villarreal@florencchc.com			Log Signer	⋮
<input checked="" type="checkbox"/> Elina Huttunen elina.huttunen@florencchc.com			Admin, Binder Owner: o. Vaccine Trial, and 13 other(s)	⋮
<input type="checkbox"/> Florence Support support@florencchc.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:

Manage Access for Elina Huttunen

Search below to add a role and manage their access

Search Role by name

- Pharmacist - test
- Regulatory
- Site Staff
- Study Coordinator
- Study Investigator**
- Study Pharmacist
- Study Staff
- Team Admin

CANCEL SAVE

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



Manage Access for **Elina Huttunen**

Search below to add a role and manage their access

study s

Filter list below

Bulk Assign *i*

<input type="checkbox"/> Role	Status	Start	End
<input type="checkbox"/> Study Investigator	Off <input type="checkbox"/> On		
<input type="checkbox"/> Admin	Off <input checked="" type="checkbox"/> On	26-Jan-2022 @ 04:45 PM EST	Never
<input type="checkbox"/> Florence Admin	Off <input checked="" type="checkbox"/> On	11-Feb-2021 @ 04:34 PM EST	Never
<input type="checkbox"/> Team Setup	Off <input checked="" type="checkbox"/> On	11-Feb-2021 @ 04:32 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.



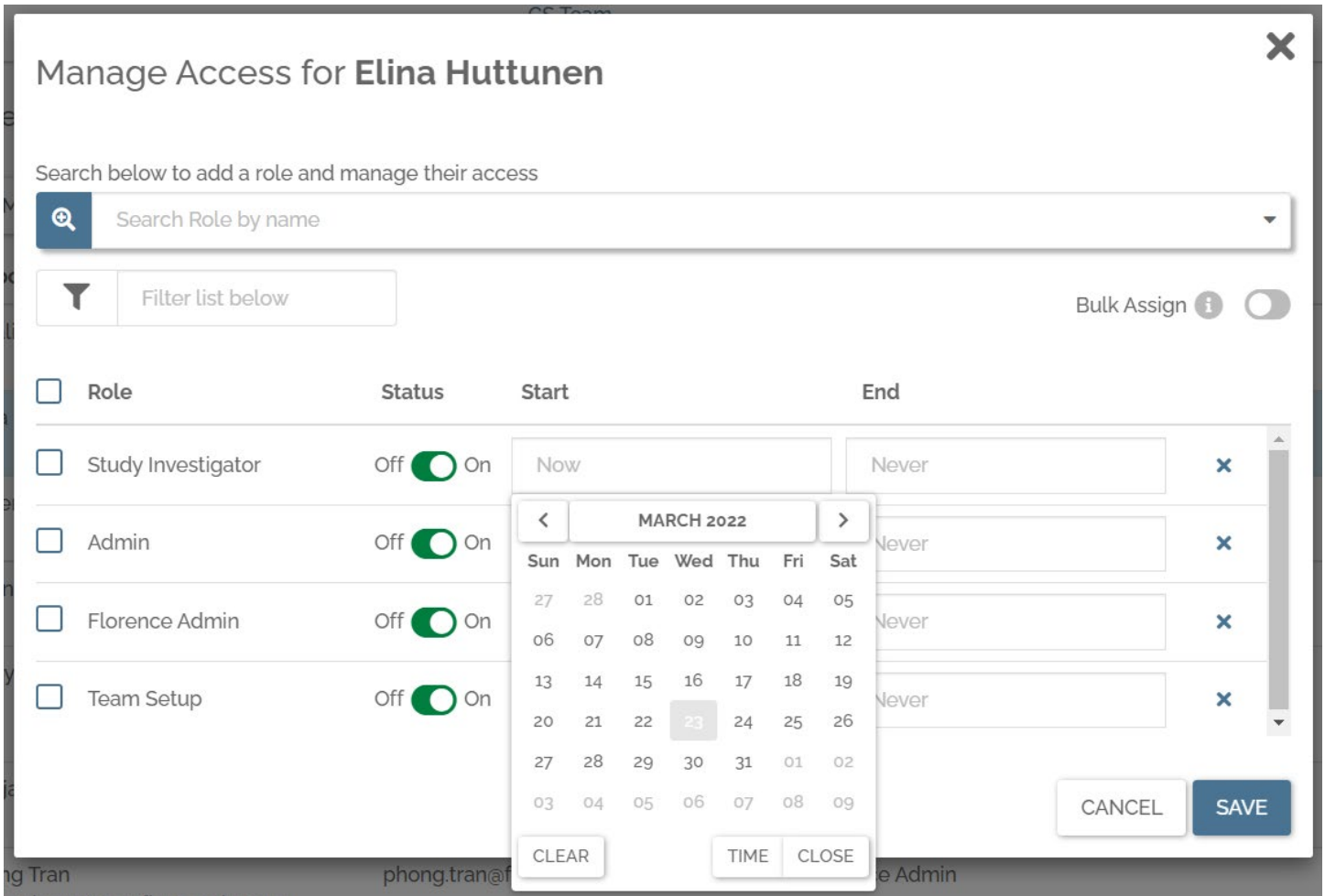
Manage Access for **Elina Huttunen**

Search below to add a role and manage their access

Bulk Assign

<input type="checkbox"/> Role	Status	Start	End	
<input type="checkbox"/> Study Investigator	Off <input checked="" type="checkbox"/> On	Now	Never	<input type="checkbox"/>
<input type="checkbox"/> Admin	Off <input checked="" type="checkbox"/> On	26-Jan-2022 @ 04:45 PM EST	Never	<input type="checkbox"/>
<input type="checkbox"/> Florence Admin	Off <input checked="" type="checkbox"/> On	11-Feb-2021 @ 04:34 PM EST	Never	<input type="checkbox"/>
<input type="checkbox"/> Team Setup	Off <input checked="" type="checkbox"/> On	11-Feb-2021 @ 04:32 PM EST	Never	<input type="checkbox"/>

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



Manage Access for Elina Huttunen

Search below to add a role and manage their access

Search Role by name

Filter list below

Bulk Assign *i*

<input type="checkbox"/> Role	Status	Start	End
<input type="checkbox"/> Study Investigator	Off <input checked="" type="checkbox"/> On	Now	Never
<input type="checkbox"/> Admin	Off <input checked="" type="checkbox"/> On		Never
<input type="checkbox"/> Florence Admin	Off <input checked="" type="checkbox"/> On		Never
<input type="checkbox"/> Team Setup	Off <input checked="" type="checkbox"/> On		Never

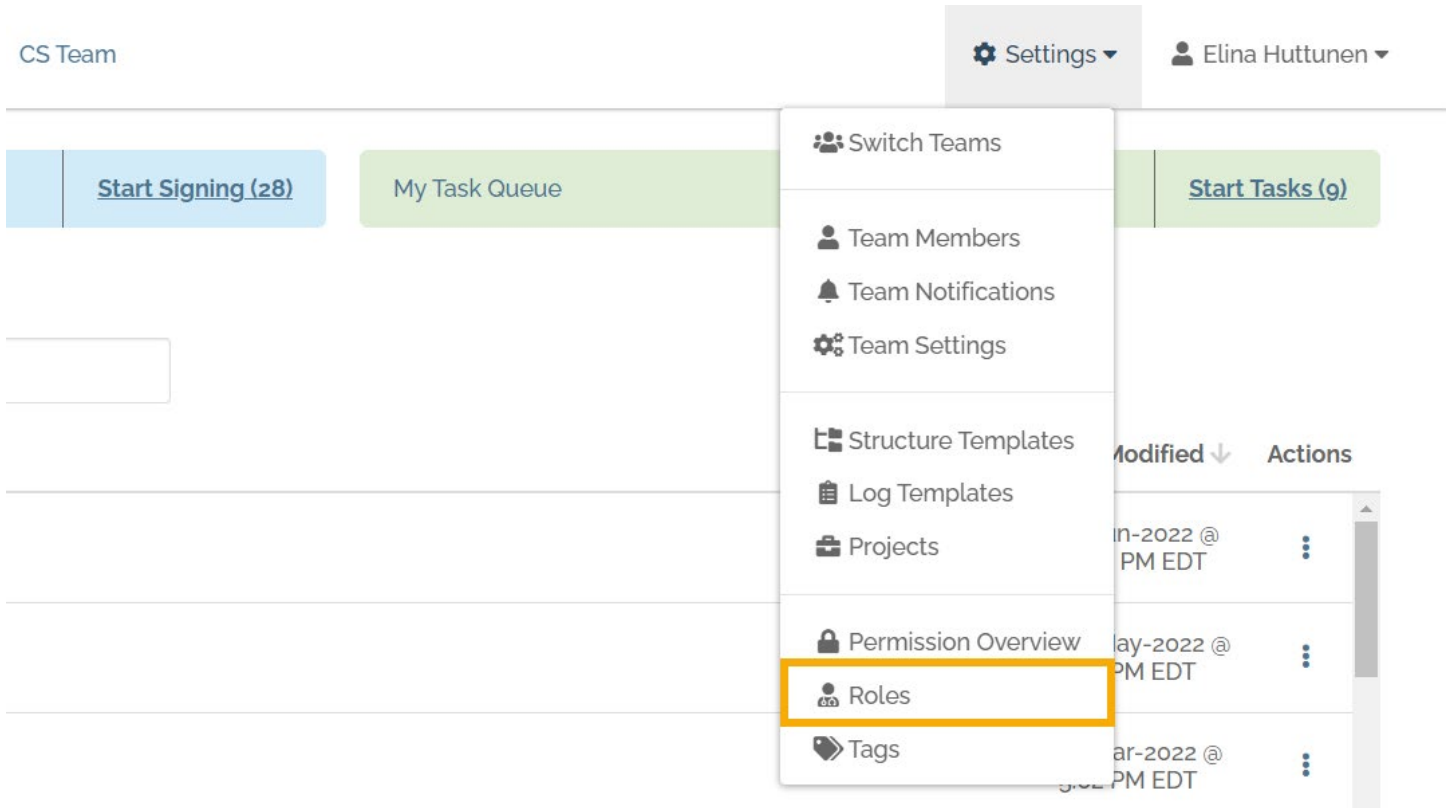
CLEAR TIME CLOSE

CANCEL SAVE

7. Click Save

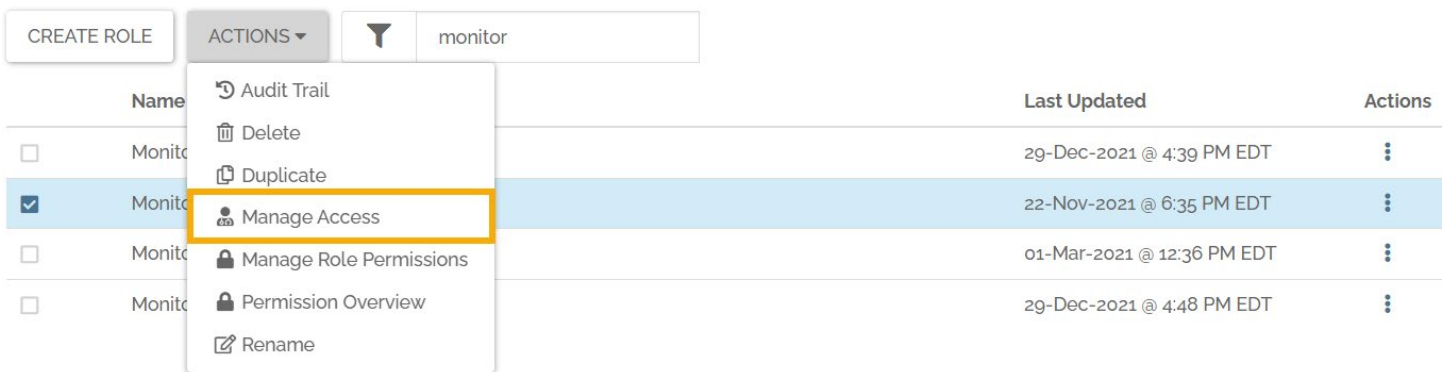
To Assign Users to Roles:

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

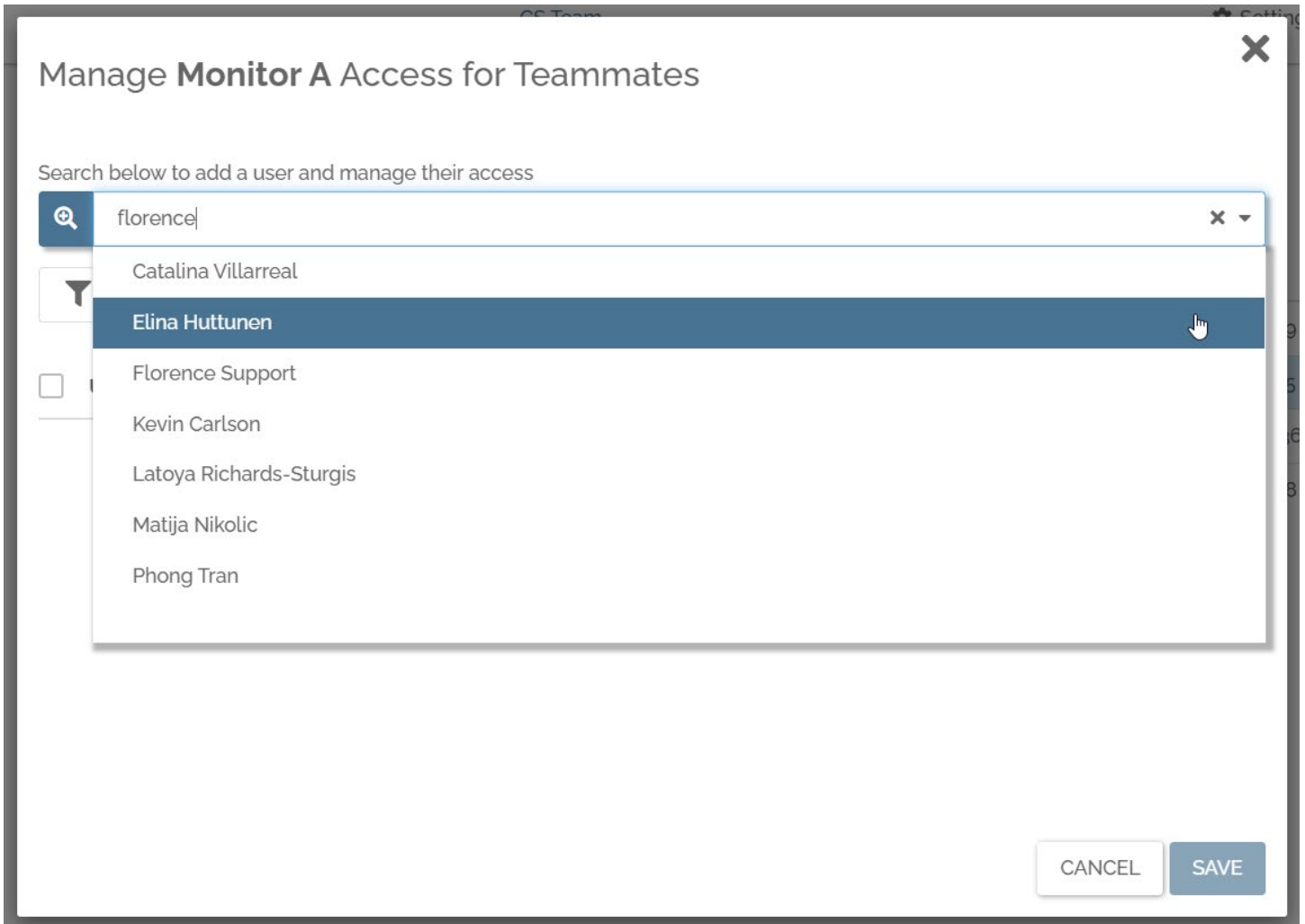


2. Once you're on the Manage Roles page, check the box next to the role you want to assign, click on the 'Actions' button and select 'Manage Access'

Manage Roles



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



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



Manage **Monitor A** Access for Teammates

Search below to add a user and manage their access

 Bulk Assign *i*

<input type="checkbox"/>	User	Status	Start	End
<input type="checkbox"/>	Elina Huttunen	Off <input type="checkbox"/> On		

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.

Manage **Monitor A** Access for Teammates

Search below to add a user and manage their access

▼ Filter list below

Bulk Assign i

<input type="checkbox"/>	User	Status	Start	End
<input type="checkbox"/>	Elina Huttunen	Off <input checked="" type="checkbox"/> On	<input type="text" value="Now"/>	<input type="text" value="Never"/> ✕

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 for Teammates ✕

Search below to add a user and manage their access

⌵

Bulk Assign i

<input type="checkbox"/> User	Status	Start	End
<input type="checkbox"/> Catalina Villarreal	Off <input type="checkbox"/> On		✕
<input type="checkbox"/> Florence Support	Off <input type="checkbox"/> On		✕
<input type="checkbox"/> Elina Hu	Off <input type="checkbox"/> On		✕
<input type="checkbox"/> Elina Huttunen	Off <input type="checkbox"/> 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

🔍 Search User by name

⌵ Filter list below

Bulk Assign i

<input checked="" type="checkbox"/>	User	Status	Start	End
This will impact 4 user(s) selected below.		Off <input checked="" type="checkbox"/> On	Now	Never
<input checked="" type="checkbox"/>	Catalina Villarreal	Off <input checked="" type="checkbox"/> On	Now	Never ✕
<input checked="" type="checkbox"/>	Elina Hu	Off <input checked="" type="checkbox"/> On	Now	Never ✕
<input checked="" type="checkbox"/>	Elina Huttunen	Off <input checked="" type="checkbox"/> On	Now	Never ✕
<input checked="" type="checkbox"/>	Florence Support	Off <input checked="" type="checkbox"/> 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.



Manage **Monitor A** Access for Teammates

Search below to add a user and manage their access

Bulk Assign

<input type="checkbox"/> User	Status	Start	End	
<input type="checkbox"/> Catalina Villarreal	Off <input checked="" type="checkbox"/> On	23-Mar-2022 @ 07:14 PM EDT	Never	<input type="button" value="x"/>
<input type="checkbox"/> Elina Hu	Off <input checked="" type="checkbox"/> On	23-Mar-2022 @ 07:14 PM EDT	Never	<input type="button" value="x"/>
<input type="checkbox"/> Elina Huttunen	Off <input checked="" type="checkbox"/> On	23-Mar-2022 @ 07:14 PM EDT	Never	<input type="button" value="x"/>
<input type="checkbox"/> Florence Support	Off <input checked="" type="checkbox"/> On	23-Mar-2022 @ 07:14 PM EDT	Never	<input type="button" value="x"/>

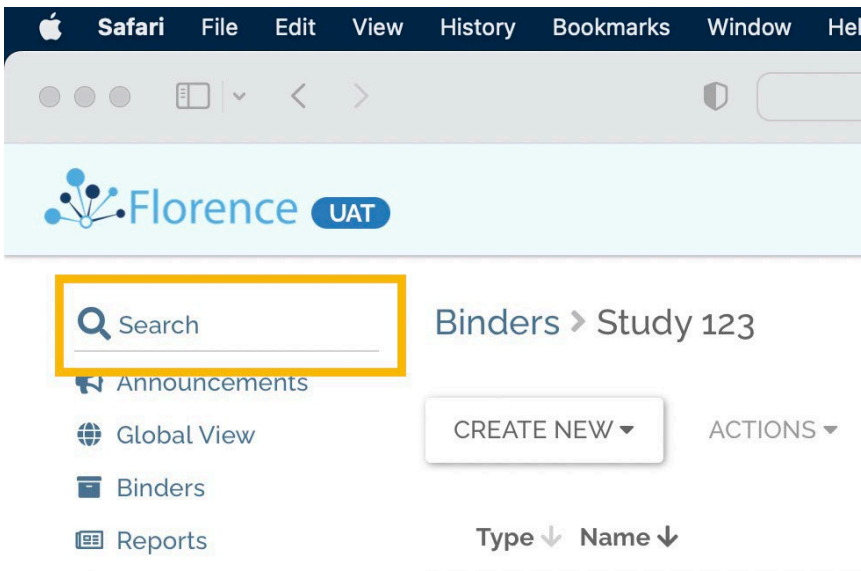


Monitor Guidance

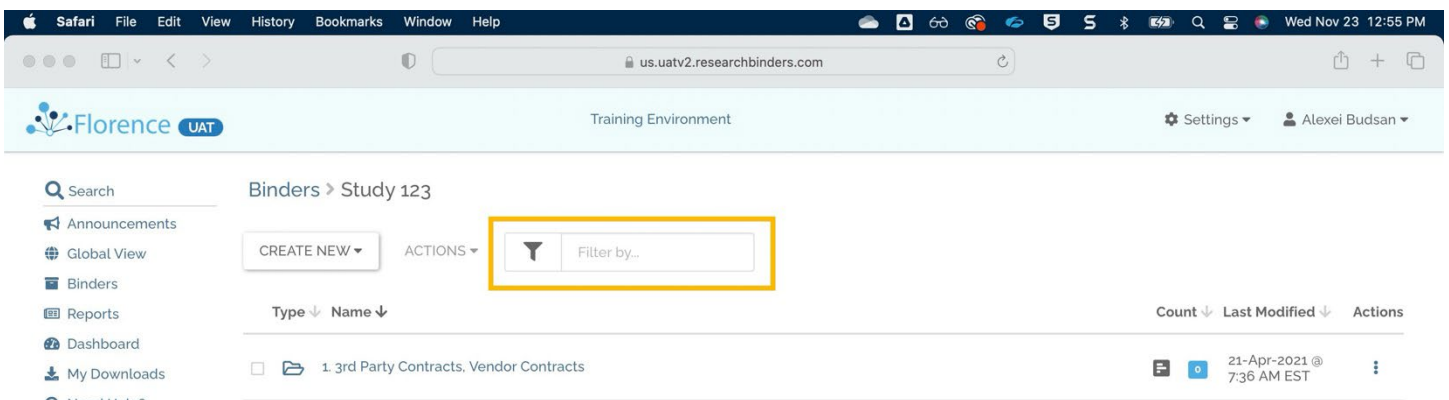
Navigation

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

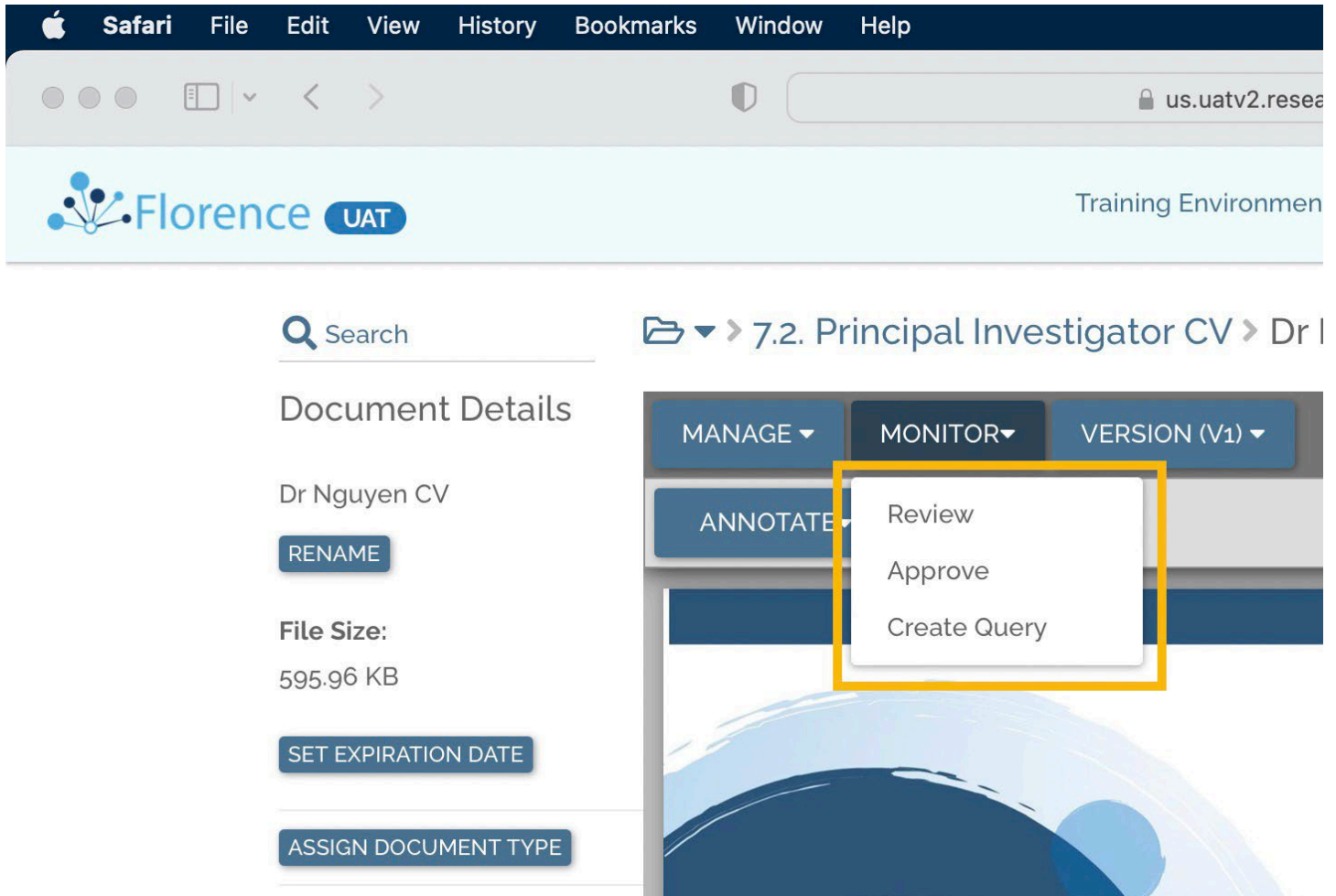
Once you've found the document you're looking for, you should see the Monitor menu at the top of the document, next to the Manage menu and Version. Under the Monitor menu, you have two options (*three if Review is enabled*).

Review if document is under review (optional feature)*

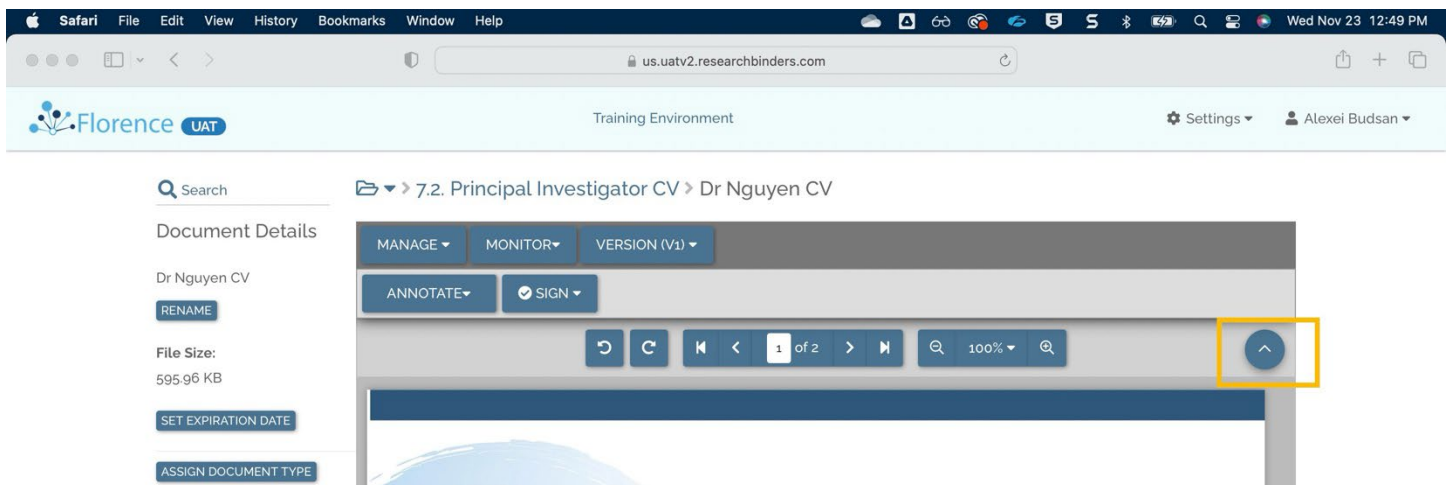
Approve if document meets requirements

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

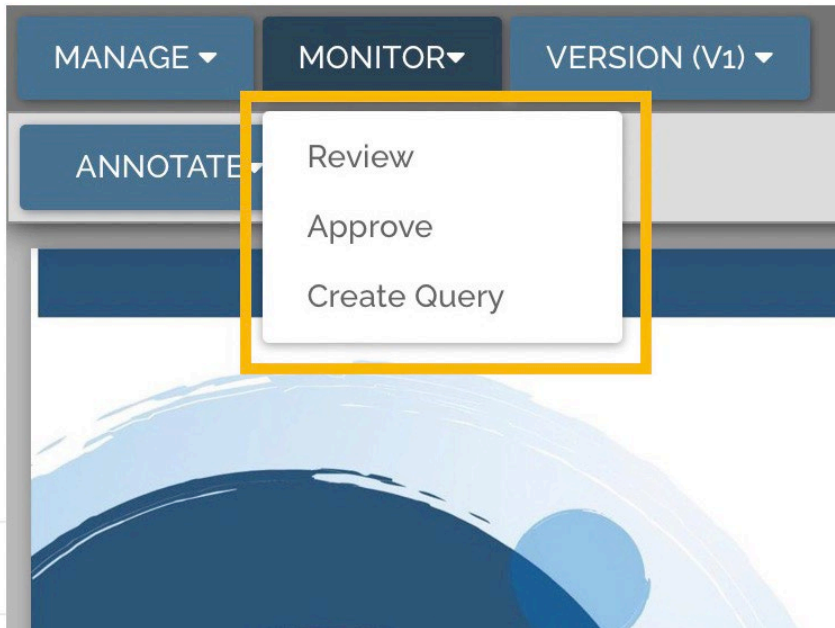
*To enable this feature (permission-driven access), please see your Team's Admin.



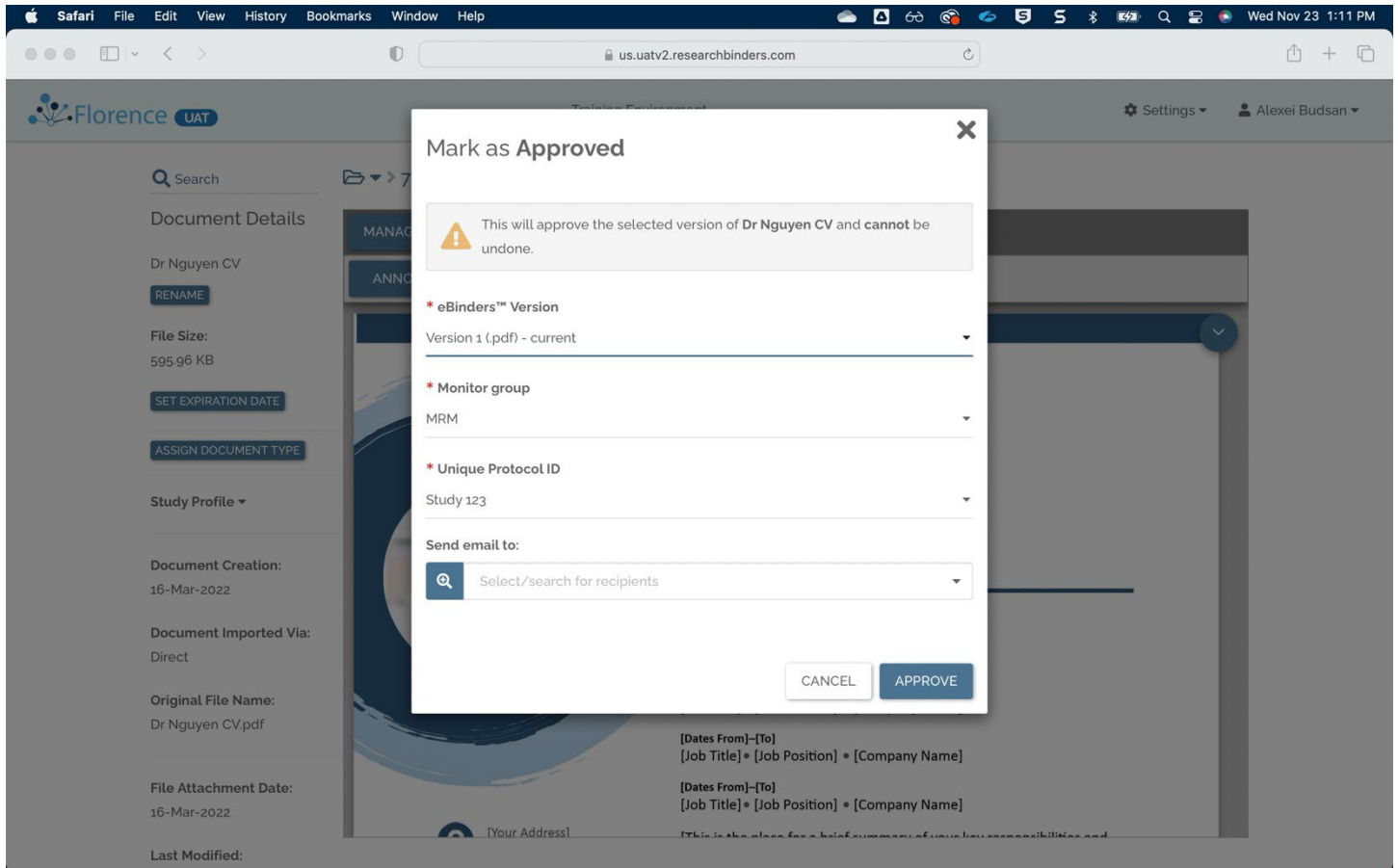
Click to zoom or rotate using the arrow icon on the top right of the document for better visibility.



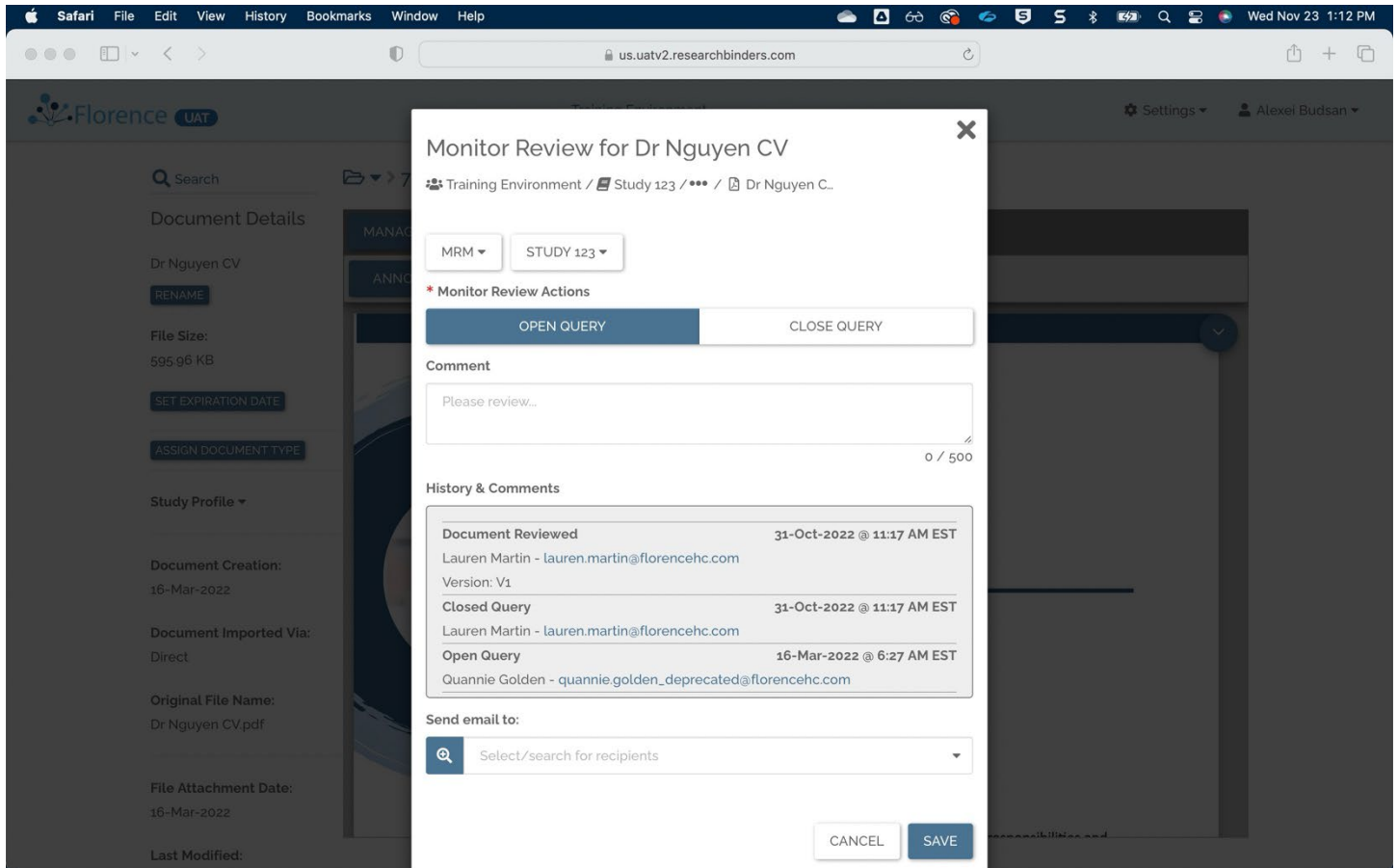
Next, either *Mark as Approve*, *Create Query*, or *Mark as Review* (if available).



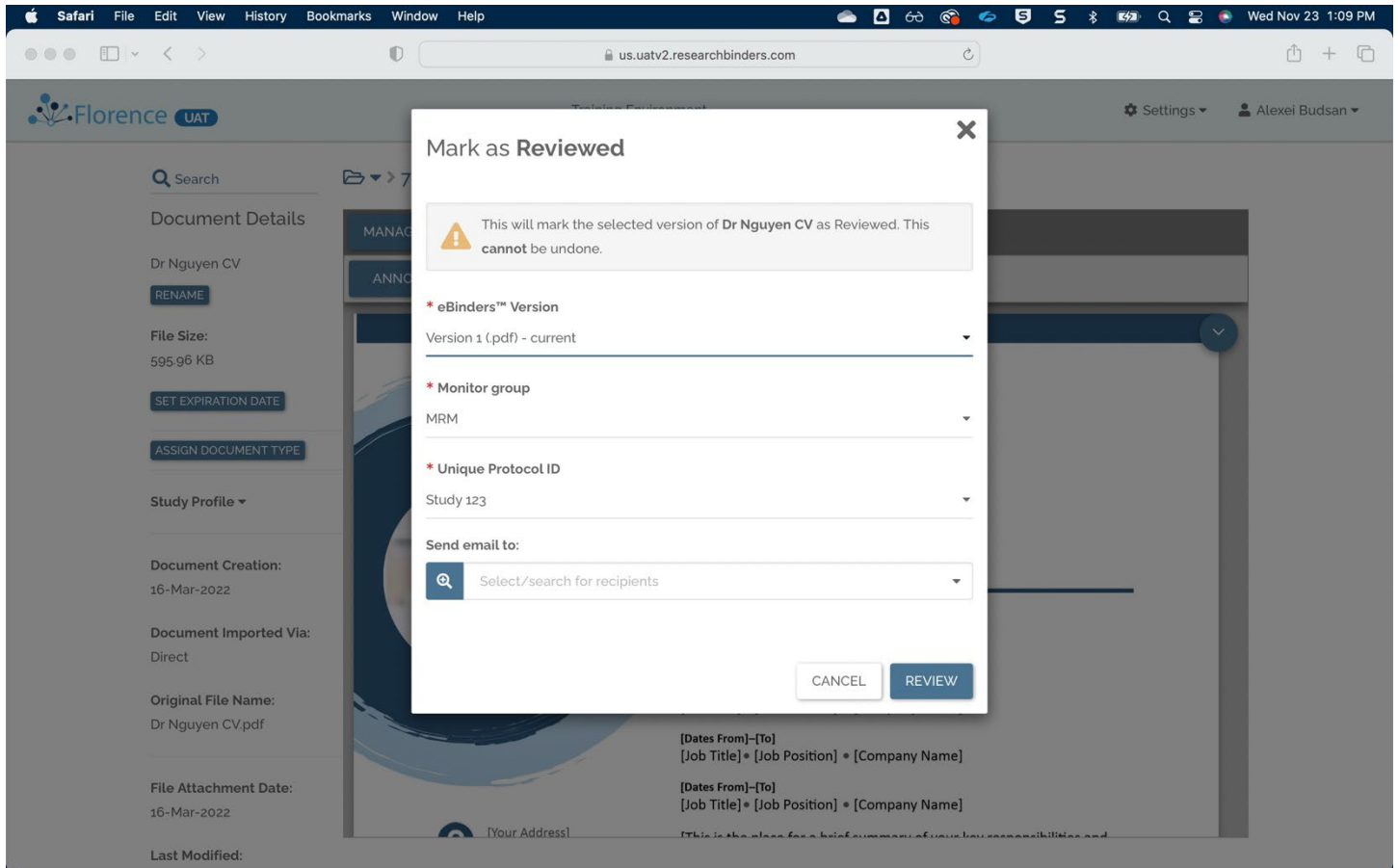
Approve - If you're happy with the document, click Approve from the menu, and then the Approve button within the popup window, you're done!



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.



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



Query Follow up

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



The screenshot shows the Florence UAT interface in a Safari browser window. The address bar shows 'us.uatv2.researchbinders.com'. The page title is 'Florence UAT' and the environment is 'Training Environment'. The user is 'Alexei Budsan'. The main content area displays '7.2. Principal Investigator CV > Dr Nguyen CV'. A sidebar on the left shows 'Document Details' for 'Dr Nguyen CV', including file size (595.96 KB) and creation date (16-Mar-2022). A dropdown menu is open over the 'Reports' option, listing '7. Investigator Qualification and Site Staff Details', 'Study 123', 'Announcements', 'Global View', 'Binders', 'Reports', 'Dashboard', and 'My Downloads'. The main content area shows a profile for 'Dr. Flo' with an 'Experience' section containing placeholder text like '[Dates From]-[To] [Job Title] • [Job Position] • [Company Name]'.



The screenshot shows the Florence UAT interface. On the left is a navigation menu with items like Announcements, Global View, Binders, Reports, Dashboard, My Downloads, and Need Help?. The main area is titled 'Reports' and features a dropdown menu labeled 'CHOOSE REPORT TYPE'. The dropdown list includes various report categories such as 'Approvals - Approved', 'Documents Expiring - In 2 Days', and 'Monitor Reviews - Open Query', which is highlighted with a yellow box. Below the dropdown, there is a text input field for filtering reports.

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

The screenshot shows the Florence UAT interface with the 'Reports' section. The 'MONITOR REVIEWS - OPEN QUERY' dropdown is selected, and 'STUDY 123' is chosen. Below the dropdowns is a 'Filter by...' field. A table displays report data with the following columns: Unique Protocol ID, Item Name, Location, Last Modified By, and Last Modified Date. The 'Item Name' 'Dr Flo CV' and the 'Last Modified By' 'Quannie Golden - quannie.golden@florencehc.com' are highlighted with yellow boxes.

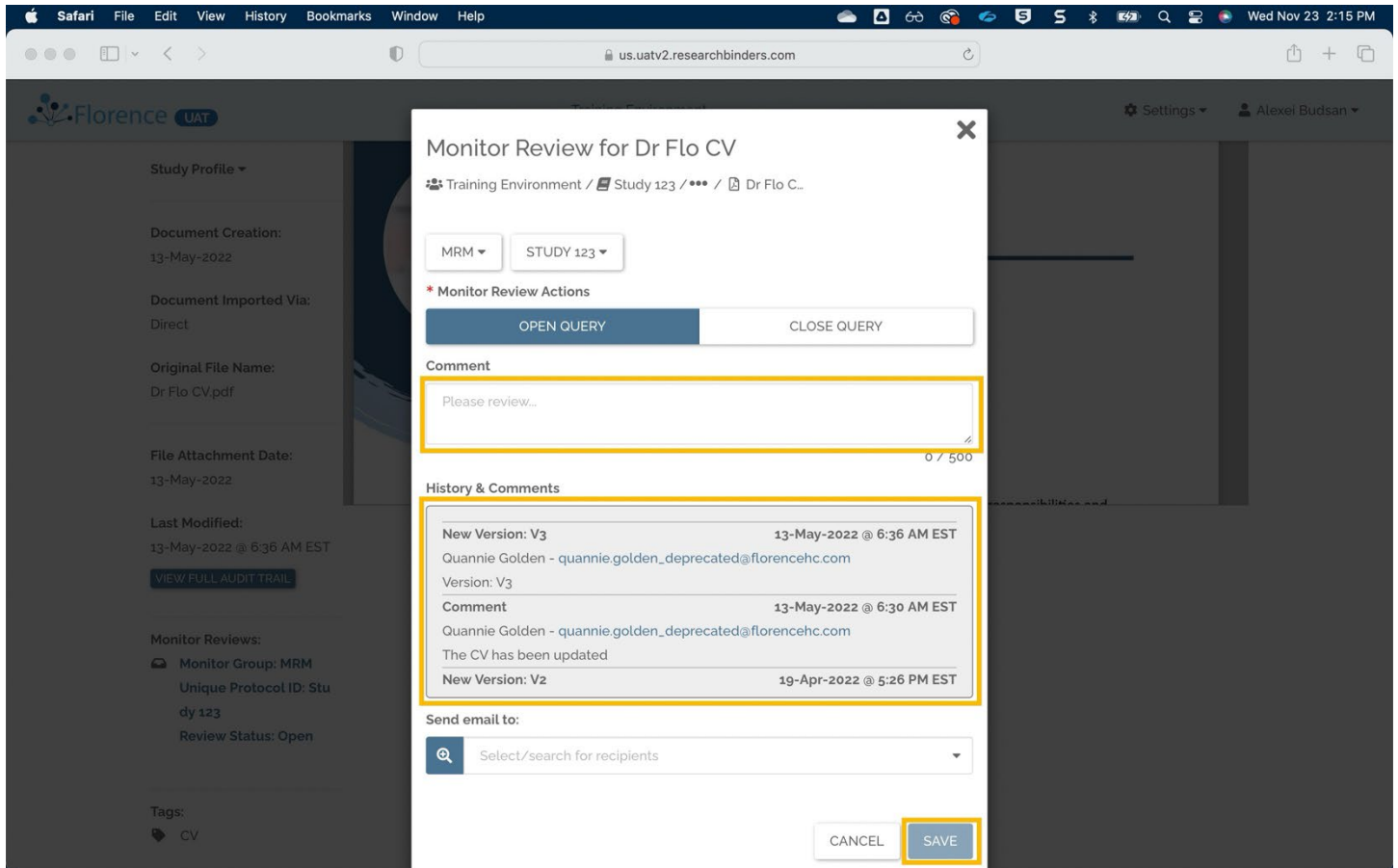
Unique Protocol ID	Item Name	Location	Last Modified By	Last Modified Date ↓
Study 123	Dr Flo CV	Study 123/7. Investigator Qualificat.	Quannie Golden - quannie.golden@florencehc.com	13-May-2022 @ 6:30 AM EST

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



The screenshot shows a web browser window displaying the Florence UAT Training Environment. The browser's address bar shows the URL 'us.uatv2.researchbinders.com'. The page header includes the Florence UAT logo, the text 'Training Environment', and user information for 'Alexei Budsan'. The main content area is titled 'Study Profile' and features a circular profile picture of a woman labeled 'Dr. Flo'. To the left of the profile picture is a sidebar with document details: 'Document Creation: 13-May-2022', 'Document Imported Via: Direct', 'Original File Name: Dr Flo CV.pdf', 'File Attachment Date: 13-May-2022', and 'Last Modified: 13-May-2022 @ 6:36 AM EST'. Below these details is a 'VIEW FULL AUDIT TRAIL' button. The 'Monitor Reviews' section shows a 'Monitor Group: MRM' and a 'Unique Protocol ID: Study 123'. A box labeled 'Review Status: Open' is highlighted in yellow. The 'Experience' section contains three placeholder entries for job history, each with fields for dates, job title, position, and company name. A 'Tags' section at the bottom shows a 'CV' tag.

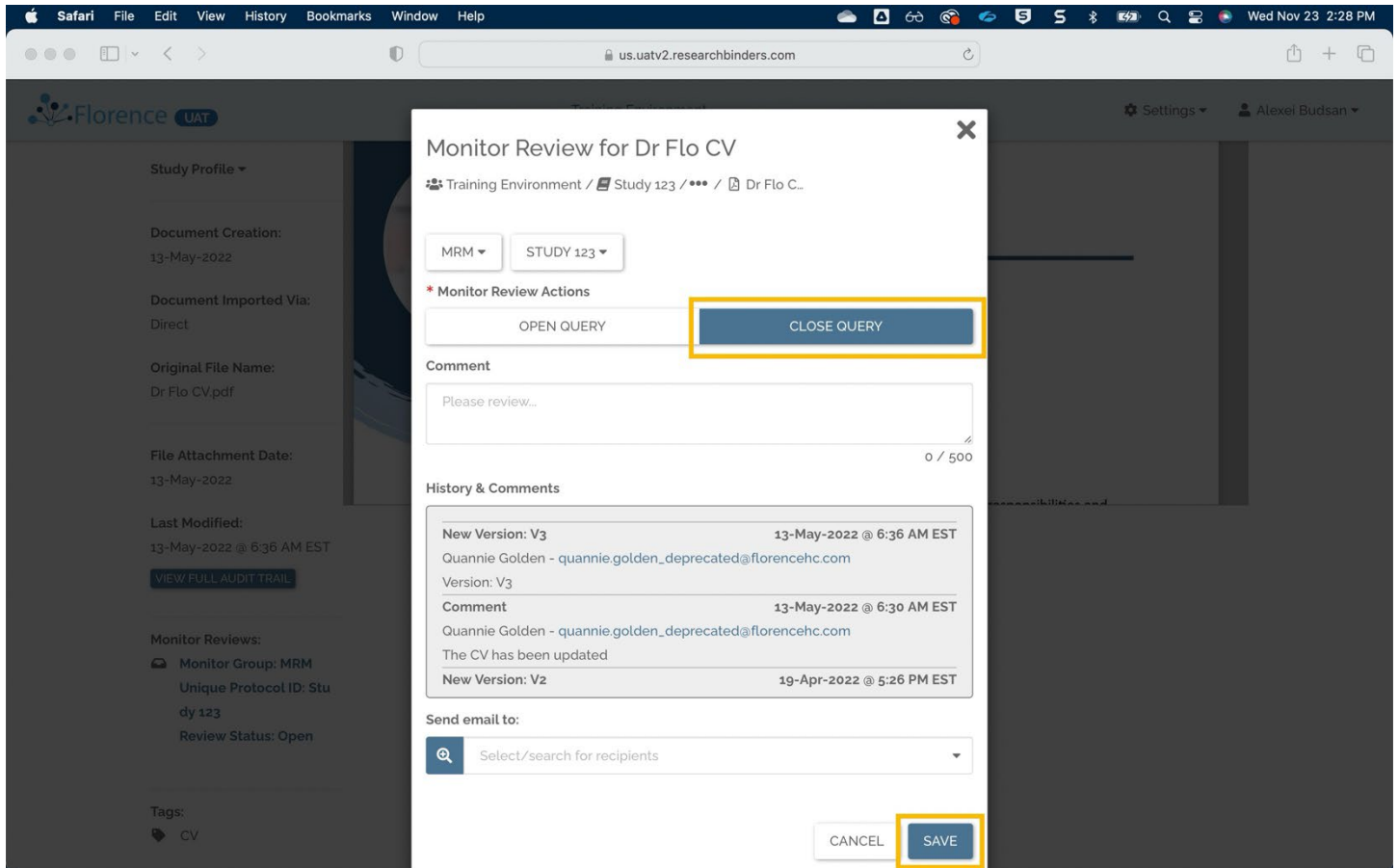
Review the Site's response in the History & Comments section.



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.



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

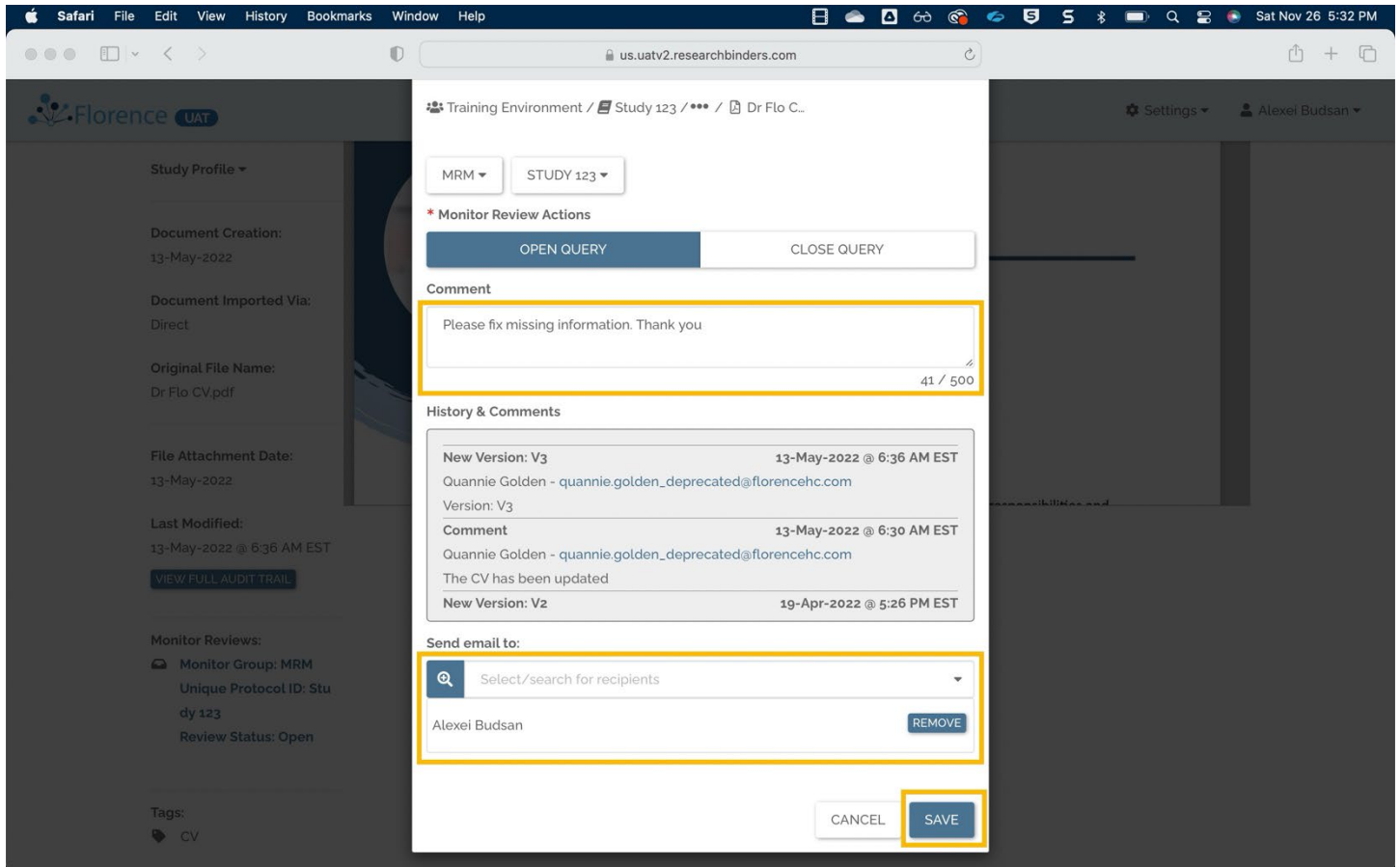
The document will appear in the Monitor Reviews - Approved and Reviewed report

MRM - Email Notification

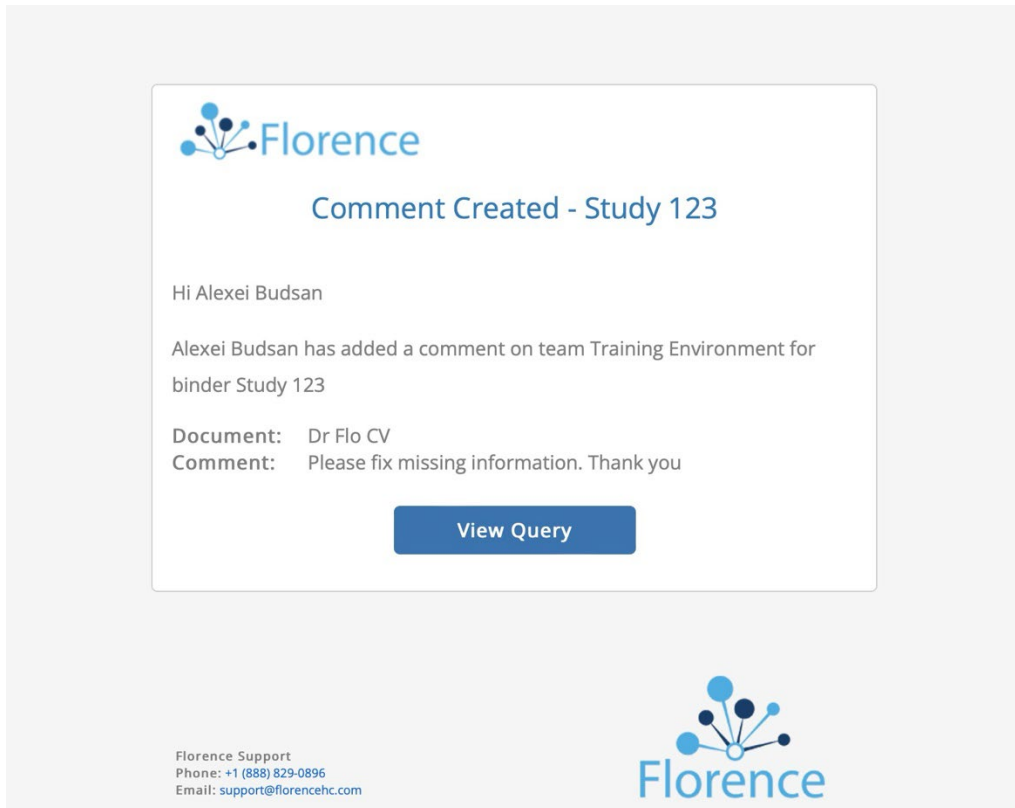
Email notifications are available for:

- 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.



*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.



The screenshot shows a notification card from Florence. At the top left is the Florence logo, which consists of a stylized network of blue and black dots connected by lines, followed by the word "Florence" in a blue sans-serif font. Below the logo, the text "Comment Created - Study 123" is centered. The main body of the card contains the following text: "Hi Alexei Budsan", "Alexei Budsan has added a comment on team Training Environment for binder Study 123", "Document: Dr Flo CV", and "Comment: Please fix missing information. Thank you". At the bottom center of the card is a blue button with the text "View Query". In the bottom left corner of the card, there is contact information: "Florence Support", "Phone: +1 (888) 829-0896", and "Email: support@florencehc.com". In the bottom right corner of the card, there is a smaller version of the Florence logo.

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

CHOOSE BINDER OR FOLDER Filter by...

2 DOCUMENTS 1 OPEN QUERY 1 APPROVED 1 REVIEWED

+ Visual Icons for MRM

- TEST DOCUMENT
- TEST DOCUMENT (1)
- TEST DOCUMENT (2)

Organization	Unique Protocol ID	Status		
MyTestMRM	Vaccine100	Open Query		22-Jun-2021 @ 8:47 PM EDT

Organization	Unique Protocol ID	Version	Status	
MyTestMRM	Vaccine100	v1	Approved	

Monitor Group	Unique Protocol ID	Version	Status	
MRM	Study 123	v1	Review	