

**HARVARD  
CATALYST**

THE HARVARD CLINICAL  
AND TRANSLATIONAL  
SCIENCE CENTER

## Quick Start Guide: User Basics – Study Staff

In this guide you will learn basic user navigation as we walk you through the HCCRC Scheduling System and review each of the modules and their general purpose.

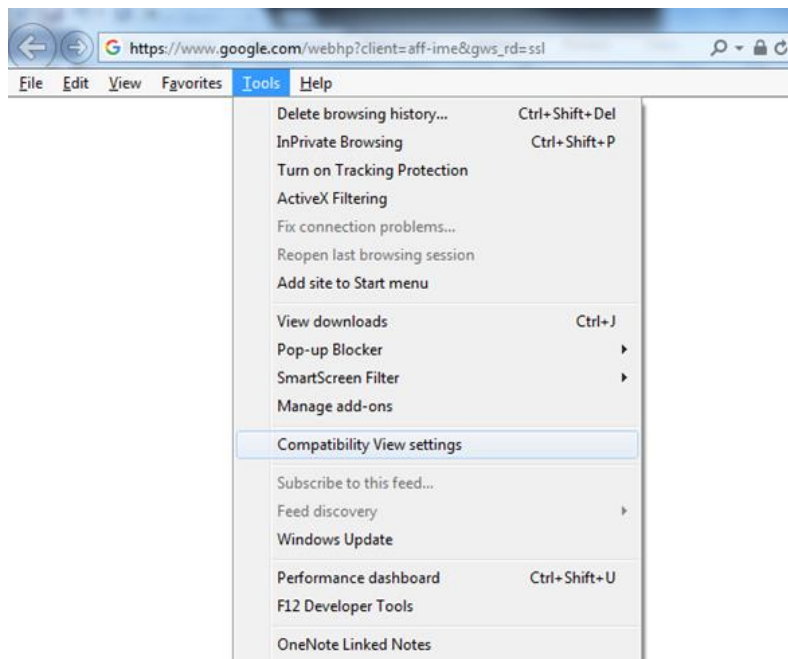
## Scheduler System Overview

The HCCRC Scheduler is a web-based tool that allows investigators, study staff, and CRC staff to schedule research subjects for study visits and manage CRC resources.

Minimum System Requirements for web browsers:

- Google Chrome
- Mozilla Firefox
- Microsoft Internet Explorer 8 (or higher)

If you are using Microsoft Internet Explorer, you **MUST** turn off the *Compatibility View* as this ensures the best performance of the Scheduler System. To turn off *Compatibility View*, press the Alt key on your keyboard while the Internet Explorer browser window is open. This will display the top menu in your browser. Go to Views and choose Compatibility View settings. From the list of "Websites you've added to Compatibility View", highlight Scheduler or other website you wish to remove. Click Remove.



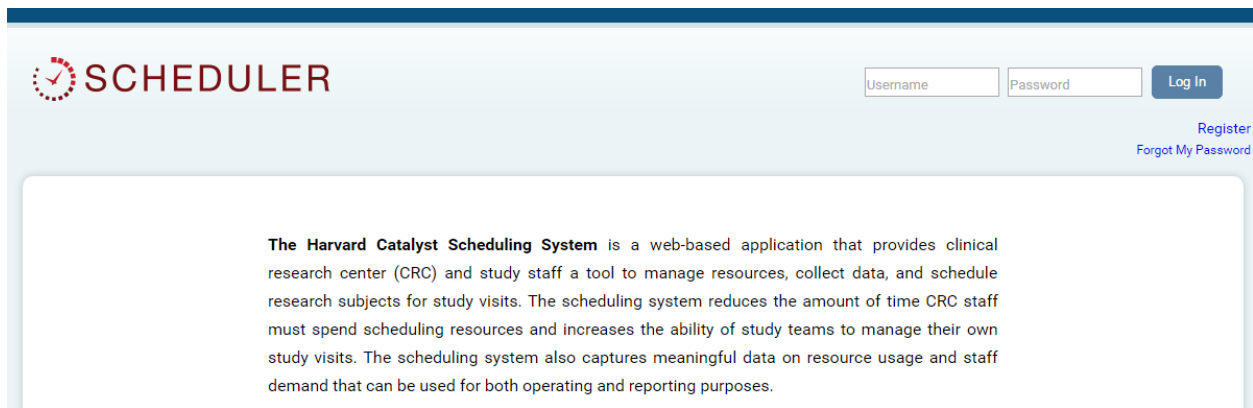
This guide only applies users that have been assigned the user role of *Study Staff* in the Scheduler System. Generally, *Study Staff* are users that should only be granted access to specific studies (investigators, research coordinators, study project managers, etc.).

Questions? Please reach out to the HCCRC Scheduler Support Team  
help desk - [harvardcatalyst.zendesk.com](https://harvardcatalyst.zendesk.com)  
email - [support@harvardcatalyst.zendesk.com](mailto:support@harvardcatalyst.zendesk.com)  
Updated 11/20/2019

## Login Screen

The Scheduler System is a web-based application. You will need to provide a URL link that can be entered in a web-browser. Please contact your research or IT administration to confirm the URL of the Scheduler System at your site.

Entering the URL will display the login page of the Scheduler System. Enter your *Scheduler Username* and *Password* in the upper right corner of the screen.



**SCHEDULER**

Username Password Log In

[Register](#)  
[Forgot My Password](#)

**The Harvard Catalyst Scheduling System** is a web-based application that provides clinical research center (CRC) and study staff a tool to manage resources, collect data, and schedule research subjects for study visits. The scheduling system reduces the amount of time CRC staff must spend scheduling resources and increases the ability of study teams to manage their own study visits. The scheduling system also captures meaningful data on resource usage and staff demand that can be used for both operating and reporting purposes.

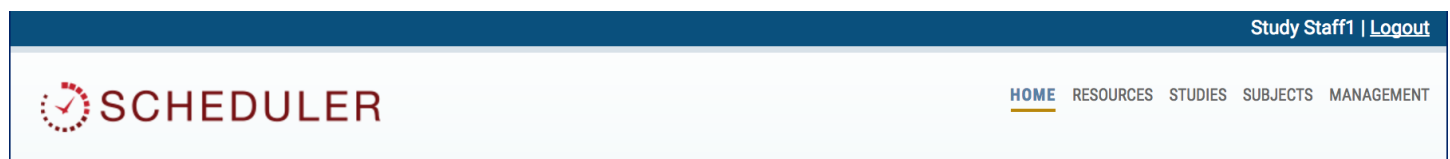
Questions? Please reach out to the HCCRC Scheduler Support Team  
help desk - [harvardcatalyst.zendesk.com](https://harvardcatalyst.zendesk.com)  
email - [support@harvardcatalyst.zendesk.com](mailto:support@harvardcatalyst.zendesk.com)  
Updated 11/20/2019

## Scheduler System Modules

The Scheduler Application has a home screen and six modules. The modules and their general purposes are:

- **Home:** This is the first screen to open when you log in to the Scheduler Application. The *Home Module* allows access to a calendar and list display of appointments. The *Appointments* tab is used to schedule the appointments that coordinate the subjects and resources. You can also access the *Resource Timeline* which provides a visual Gantt of already-booked resources.
- **Resources:** Clinical Research Center resources (e.g., nurses, nutritionists, rooms, hand warmers) used in the studies which can be scheduled through this application. The Resources module enables all users to view resources and resource details. (Resource Managers and Super Admins can add, edit and delete resources.)
- **Studies:** The *Studies Module* enables both study staff and CRC staff to manage study details and define visit requirements as specified in study protocols.
- **Subjects:** The *Subjects Module* is used to add and manage subjects used as participants in studies in the application.
- **Management:** The *Management Module* is available to all users for changing a password; however, it is primarily used by Super Admins to manage system users. (Super Admins are the only role able to see a list of all users in the system and can add, delete and update user information.)

A blue ribbon displayed along to the top of the screen is always displayed in the Scheduler System. To get to any of the modules, simply click the name of the module along the blue ribbon.



Questions? Please reach out to the HCCRC Scheduler Support Team  
help desk - [harvardcatalyst.zendesk.com](https://harvardcatalyst.zendesk.com)  
email - [support@harvardcatalyst.zendesk.com](mailto:support@harvardcatalyst.zendesk.com)  
Updated 11/20/2019

## Home Screen

The *Home Screen* is the default first page of the Scheduler System. It displays all study visit appointments with subjects that are scheduled, admitted or discharged. Appointments that are canceled are also displayed but only for 48 hours after the time at which it was canceled.

You can select to view the appointments in a list view by changing the Display.

You can also choose to view the Timeline to see resources that have already been scheduled.

The screenshot displays the Scheduler System interface. At the top, there are two tabs: "Appointments" (selected) and "Resource Timeline". Below the tabs, the "View by:" section has radio buttons for "Calendar" (selected) and "List". The "Select Date:" field shows "09/01/2019" with a calendar icon, and the "Filter By:" dropdown is set to "choose" with a "Reset" button. A blue bar labeled "Schedule New Appointment" contains icons for appointment statuses: Available, Scheduled, Hold, Checked In, Checked Out, Canceled, Unavailable, and Booked <24 Hours. Below this are location filters: "Gryzmish", "Non CRC", "Off Institution", and "All Sub-Locations" (selected). The main calendar view shows "September 2019" with navigation arrows and a "today" button. The calendar grid has columns for Sunday through Saturday. On Friday, September 6th, there are several appointment blocks: a green block (07:00 - 08:00, SUBJECT21240), a dashed grey block (07:00 - 08:00, SUBJECT21240), a purple block (08:00 - 09:00, SUBJECT21240), a green block (17:00 09/06 - 09:00 09/08, SUBJECT21242), a purple block (17:00 09/06 - 15:00 09/07, SUBJECT21244), and a grey block (19:00 09/06 - 11:00 09/08, SUBJECT21248).

Questions? Please reach out to the HCCRC Scheduler Support Team  
help desk - [harvardcatalyst.zendesk.com](https://harvardcatalyst.zendesk.com)  
email - [support@harvardcatalyst.zendesk.com](mailto:support@harvardcatalyst.zendesk.com)  
Updated 11/20/2019

## Resources Module

The *Resources Module* displays all of the resources at your clinical research center and the resource sub-location...

The screenshot shows the SCHEDULER interface for the Resources Module. At the top right, it says "Study Staff1 | Logout". The navigation bar includes "HOME", "RESOURCES" (highlighted), "STUDIES", "SUBJECTS", and "MANAGEMENT". Below the navigation bar, there is a breadcrumb "Home > Resources". The main heading is "Resources". There is a "View:" dropdown set to "Active Only" and "Display Records:" set to "100". The page is "Page 1 of 2" with "Go" and navigation arrows. Below this is a table with columns: Resource Name, Resource Type, Sub-Location, and Status. Each row has a "More Actions" link.

Resource Name	Resource Type	Sub-Location	Status	
1 Outpt - ACC	Room	ACC	Active	<a href="#">More Actions</a>
1 Outpt - CTC	Room	CTC	Active	<a href="#">More Actions</a>
1 Outpt - CTH	Room	CTH	Active	<a href="#">More Actions</a>
1 Outpt Infusion - CTH	Room	CTH	Active	<a href="#">More Actions</a>

## Studies Module

The *Studies Module* displays all of the studies that have been assigned to users by their CRC administration.

The screenshot shows the SCHEDULER interface for the Studies Module. At the top right, it says "Study Staff1 | Logout". The navigation bar includes "HOME", "RESOURCES", "STUDIES" (highlighted), "SUBJECTS", and "MANAGEMENT". Below the navigation bar, there is a breadcrumb "Home > Studies List". The main heading is "Studies". There is a "Display Records:" dropdown set to "50" and "Page 1 of 1" with "Go". Below this is a table with columns: Name, PI Last Name, PI First Name, IRB Number, Local ID, and Study Status. Each row has a "View Detail" link.

Name	PI Last Name	PI First Name	IRB Number	Local ID	Study Status	
Scheduling Inpatient CT	Staff1	Study	2001ICT001	ICT-001	OPEN	<a href="#">View Detail</a>
Scheduling Inpatient RT	Staff1	Study	2001IRT001	IRT-001	OPEN	<a href="#">View Detail</a>
Scheduling Outpatient	Staff1	Study	2001OUT001	OUT-001	OPEN	<a href="#">View Detail</a>


Questions? Please reach out to the HCCRC Scheduler Support Team  
help desk - [harvardcatalyst.zendesk.com](https://harvardcatalyst.zendesk.com)  
email - [support@harvardcatalyst.zendesk.com](mailto:support@harvardcatalyst.zendesk.com)  
Updated 11/20/2019

## Subjects Module

The *Subjects Module* allows users to create new subject records or search for existing subject records already in the database to add to their studies...

Home > Subjects

### Search Subject List


MRN  or Last name, First name  Birthdate MM/DD/YYYY  

Filter by gender:  Male  Female  Female to Male  Male to Female  Unreported  Declined

## Management Module

The *Management Module* allows you to change your password. If you have logged into the Scheduler System for the very first time, this will be the first page displayed in order to prompt you to change your temporary password.

Study Staff1 | [Logout](#)

 SCHEDULER

HOME RESOURCES STUDIES SUBJECTS MANAGEMENT

Home > Management

### Change Password

\* = Required Field

Password\*

Confirm Password\*

Questions? Please reach out to the HCCRC Scheduler Support Team  
help desk - [harvardcatalyst.zendesk.com](https://harvardcatalyst.zendesk.com)  
email - [support@harvardcatalyst.zendesk.com](mailto:support@harvardcatalyst.zendesk.com)  
Updated 11/20/2019