

**HARVARD
CATALYST**

THE HARVARD CLINICAL
AND TRANSLATIONAL
SCIENCE CENTER

Quick Start Guide: User Basics - Administration

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

Questions? Please reach out to the HCCRC Scheduler Support Team
help desk - harvardcatalyst.zendesk.com
email - support@harvardcatalyst.zendesk.com

Updated 11/20/2019

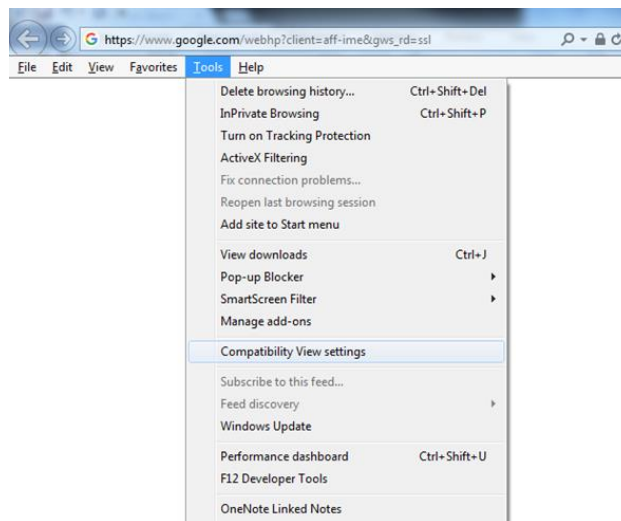
Scheduler System Overview

The HCCRC Scheduling System 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 to the following user roles in the Scheduler System:

- Super Admin
- Resource Manager
- Scheduler
- Front Desk

If you are not one of the specified user roles listed above, some of the modules and screens presented in this guide will not be available to you.

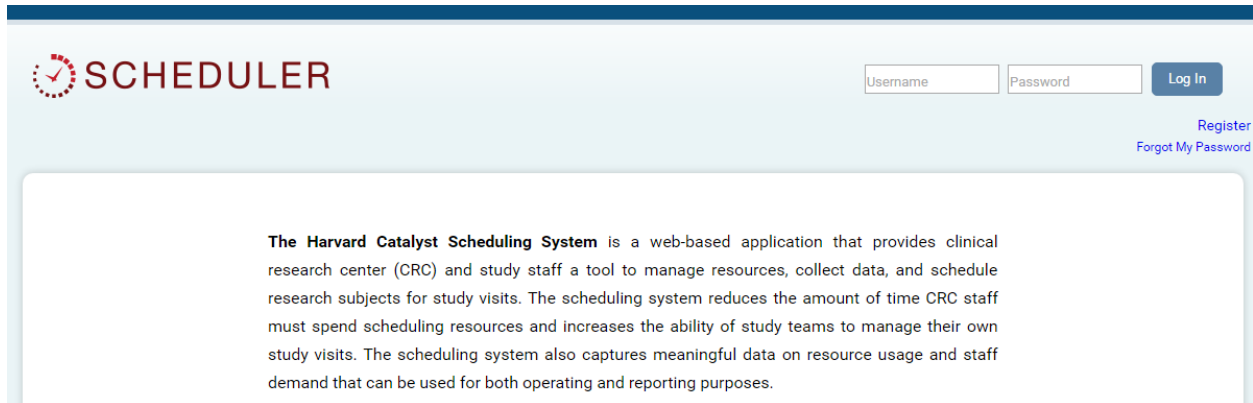
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Login Screen

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.

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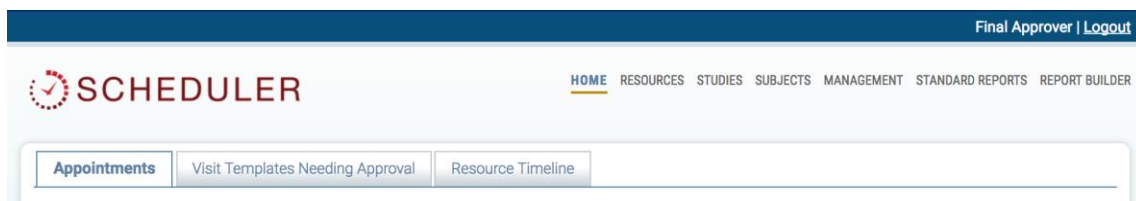
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Scheduler System Modules

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. It allows you to access to a calendar and list display of appointments. The *Appointments* tab is used to schedule the appointments that coordinate the subjects and resources. The *Visit Templates Needing Approval* tab contains the list of templates that require approval. You can also access the *Resource Timeline* which provides a visual Gantt of already-booked resources.
- **Resources:** The *Resources Module* is used to manage Clinical Research Center resources (e.g., nurses, nutritionists, rooms, equipment) that can be scheduled through this application. This 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.
- **Reporting:** A list of standard reports used as a tool for operational and administrative reporting purposes.
- **Report Builder:** A custom report data acquisition tool used to query user-defined fields and parameters.

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.



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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.

The screenshot shows the Scheduler Home Screen interface. At the top, there are tabs for 'Appointments', 'Visit Templates Needing Approval', and 'Resource Timeline'. Below the tabs, there are options to 'View by: Calendar' (selected) or 'List'. A 'Select Date' field shows '09/01/2019' and a 'Filter By' dropdown menu. A 'Reset' button is also present. A 'Schedule New Appointment' button is visible. Below this, there are status filters: Available, Scheduled, Hold, Checked In, Checked Out, Canceled, Unavailable, and Booked <24 Hours. There are also location filters: Gryzmish, Non CRC, Off Institution, and All Sub-Locations. The main area shows a calendar for 'September 2019' with a grid of days. Appointments are displayed as colored blocks on the calendar, with details like '02:45 09/03 - 14:00 09/13: SUBJECT1330'.

If you review or approve templates, it also displays any templates that require your approval. To review templates needing approval, click on the *Visit Templates Needing Approval* tab...

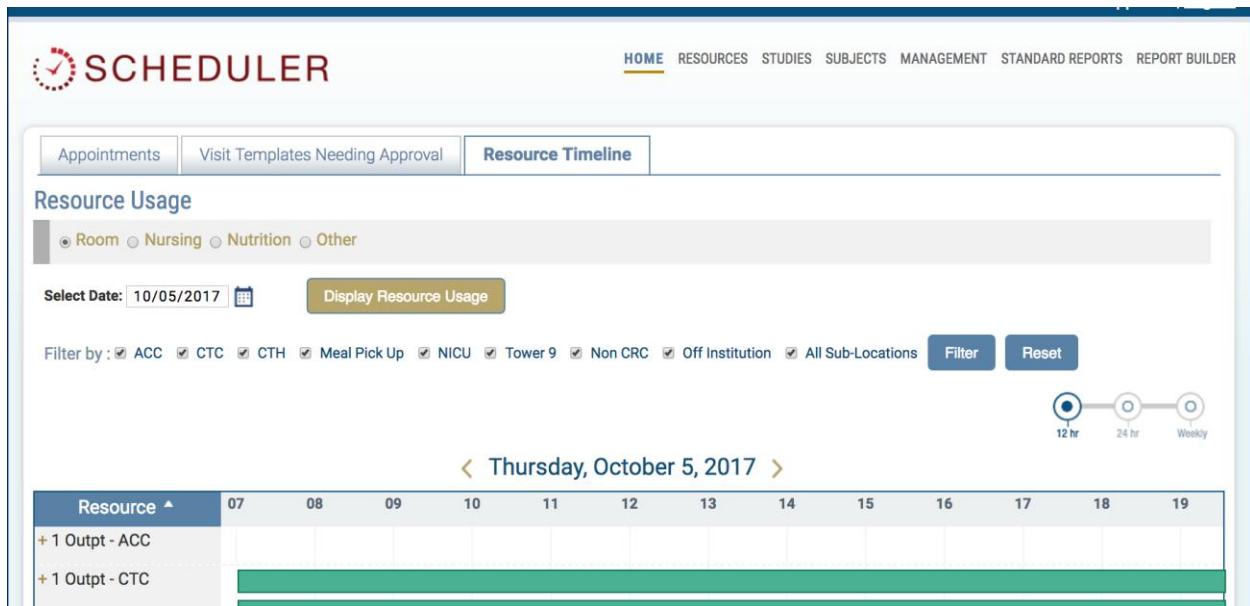
The screenshot shows the Scheduler interface with the 'Visit Templates Needing Approval' tab selected. The top navigation bar includes 'HOME', 'RESOURCES', 'STUDIES', 'SUBJECTS', 'MANAGEMENT', 'STANDARD REPORTS', and 'REPORT BUILDER'. Below the navigation, there are tabs for 'Appointments', 'Visit Templates Needing Approval', and 'Resource Timeline'. A 'Display Records' dropdown is set to '5', and the page is 'Page 1 of 11'. A table lists the templates with columns for Study ID, PI Name, Visit Name, Visit Type, Sub-location, Last Updated, and actions like 'View Detail' and 'Approve'.

Study ID	PI Name	Visit Name	Visit Type	Sub-location	Last Updated		
2009P002843	staff588 study	Visit 1 (Enrollment) W/Tech to do Blood Draw (CTC)	Outpatient Non CRC	CTC	06/07/2016	View Detail	Approve

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

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Resources Module

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

Home > Resources

Resources

Filter By: Active Only

Display Records: 100 Page 1 of 2 Go > >>

Create New Resource View Sub-location Closures Bulk Activate

Resource Name	Resource Type	Sub-Location	Status	
1212 Blood Draw Chair - CNY	Lab	CNY	Active	More Actions
1212 Blood Draw Chair - WHT 12	Room	WHT 12	Active	More Actions
1212 Infusion Room Chair A - WHT 12	Room	WHT 12	Active	More Actions
1212 Infusion Room Chair B - WHT 12	Room	WHT 12	Active	More Actions
1212 Infusion Room Chair C - WHT 12	Room	WHT 12	Active	More Actions
1218 Bed A - WHT 12	Room	WHT 12	Active	More Actions
1218 Bed B - WHT 12	Room	WHT 12	Active	More Actions
1220 Bed A - WHT 12	Room	WHT 12	Active	More Actions
1220 Bed B - WHT 12	Room	WHT 12	Active	More Actions

Studies Module

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The *Studies Module* displays all of the studies at your clinical research center...

Home > Studies List

Studies

Search by PI Last Name or Local ID:

Display Records: Page of 9

Name	PI Name	Catalyst ID	Local ID	Study Status	
A pilot study to test the effect of low and high tryptophan intake on metformin response in healthy volunteers.	staff180, study	1493	1119	CLOSED	View Detail
A blended collaborative care program for cardiac patients with depression or an anxiety disorder	staff116, study	1629	1137	OPEN	View Detail
A brain imaging study of opioid (morphine) and non-opioid (ketorolac) conditioning effects	staff122, study	553	0982	OPEN	View Detail

Subjects Module

The *Subjects Module* displays all subject records that have ever been created in your Scheduler System...

Home > Subjects

Search Subject List

or

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

Management Module

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The *Management Module* displays all user records that have ever been created in the Scheduler System...

Home > Management

User Management

Search by Last Name or User ID:

Display Records: Page of 23

Last Name	First Name	Primary Contact Number	User ID	Status	
Admin	Super	(123) 456-7890	SA123	Active	View Detail
Approver	Final	(555) 555-5555	fa123	Active	View Detail
ApproverP1	Final	(555) 555-5555	fa1231	Active	View Detail
ApproverP10	Final	(555) 555-5555	fa12310	Active	View Detail
ApproverP1000	Final	(555) 555-5555	fa1231000	Active	View Detail
ApproverP1001	Final	(555) 555-5555	fa1231001	Active	View Detail
ApproverP1002	Final	(555) 555-5555	fa1231002	Active	View Detail

Standard Reports Module

The Standard Reports module contains a list of standardized reports used for resource management and analysis...

Home > Standard Reports

NOTE: Visits with Hold status are not included in most standard reports. To view such visits, please use the Report Builder

Standard Reports

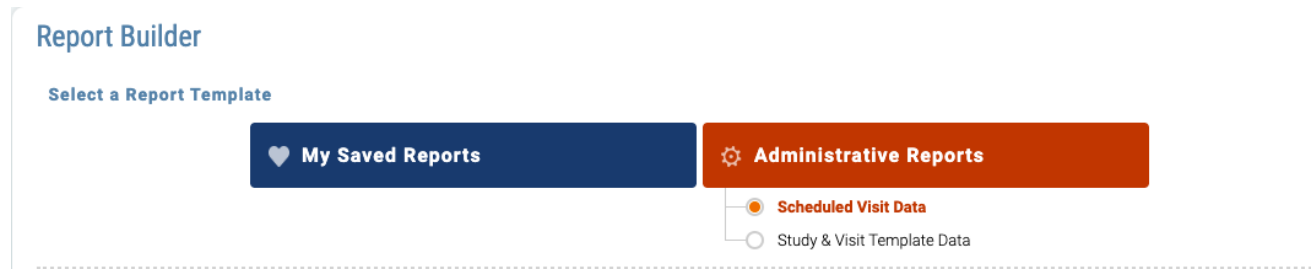
Name	Description
Ancillaries Only Visits By Protocol	A count of Ancillaries Only visits by protocol (category A, B, D) in a specific date range
Billable Resources	List of Checked-Out billable resources with PI information for a particular date range
Billing	List of Checked-Out Visits by billable resource, with over midnight calculation for a particular date range
Billing by Investigator	List of Checked-Out Visits by billable resource sorted by PI; can run single PI reports for a particular date range
Booked Visit Service Levels by Visit Type	A count of levels of service per visit in a specific time range
Cancellations and Reasons	List of Cancellations and Reasons by study, visit and subject for a particular date range
Census	List of Checked-Out Visits by completed, terminated prior to completion, and Reasons by visit, PI and study for a particular date range
CRC Availability	CRC Availability

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Report Builder Module

The *Report Builder Module* provides a custom reporting tool for users to create their own scheduling report with user-defined fields and data. The user may start with a report type or template and select desired fields to include in the final report.



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