

**HARVARD  
CATALYST**

THE HARVARD CLINICAL  
AND TRANSLATIONAL  
SCIENCE CENTER

## Quick Start Guide: User Management

In this guide you will learn how to manage users in the HCCRC Scheduling System by creating new users, editing existing users and assigning users to specific study protocols.

## Navigate to the User Management Module

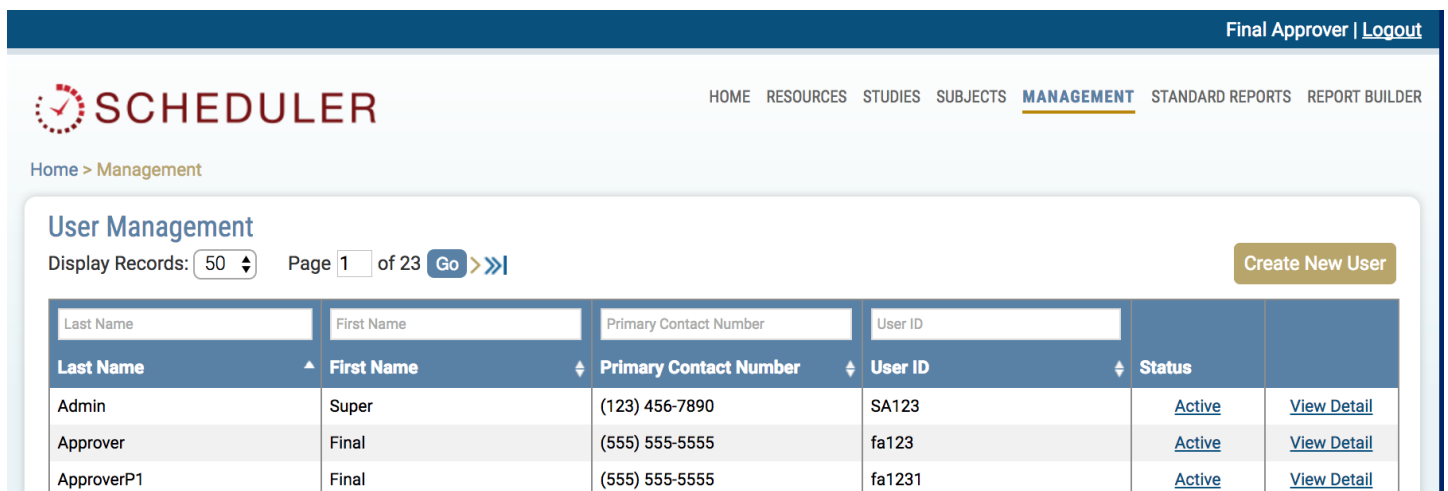
Before starting, please note that user management (add, deactivate or edit user information) can only be performed by specific user roles in the Scheduler System. These user roles include:

- Super Admin
- Resource Manager
- Scheduler

If you are not one of the specified user roles listed above, you will not have the ability to manage users in the Scheduler System.

After successfully logging into the Scheduler System, click on the module labeled *Management* found within the ribbon along the top of the screen to navigate to the *Management* module.

The *Management* module displays a page with all users in your Scheduler System. Users are organized in a sortable table with 6 different fields: *Last Name*, *First Name*, *Primary Contact Number*, *User ID*, *Status* and *View Detail*.



The screenshot shows the Scheduler User Management interface. At the top right, it says "Final Approver | Logout". The navigation bar includes "HOME", "RESOURCES", "STUDIES", "SUBJECTS", "MANAGEMENT" (highlighted), "STANDARD REPORTS", and "REPORT BUILDER". Below the navigation bar, there is a breadcrumb "Home > Management". The main content area is titled "User Management" and includes a "Display Records: 50" dropdown, "Page 1 of 23", a "Go" button, and a "Create New User" button. The table below lists three users: Admin, Approver, and ApproverP1.

Last Name	First Name	Primary Contact Number	User ID	Status	View Detail
Admin	Super	(123) 456-7890	SA123	<a href="#">Active</a>	<a href="#">View Detail</a>
Approver	Final	(555) 555-5555	fa123	<a href="#">Active</a>	<a href="#">View Detail</a>
ApproverP1	Final	(555) 555-5555	fa1231	<a href="#">Active</a>	<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)  
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## Adding a New User

To add a new user, click the *Create New User* button while on the *Management* module.

This will navigate you to a page with a user form to enter user data. Fields with asterisks are required. After entering the necessary user data, click on the *Save* button.

Home > Management > Create New User

### Create New User

\* = Required Field

First Name *	<input type="text"/>	Primary Phone *	<input type="text"/>
Middle Name	<input type="text"/>	Secondary Phone	<input type="text"/>
Last Name *	<input type="text"/>	Credential	<input type="text" value="Choose or Type Ahead"/>
User Id *	<input type="text"/>	Title *	<input type="text" value="Choose or Type Ahead"/>
Role *	<input type="text" value="Choose or Type Ahead"/>	Faculty Rank	<input type="text" value="Choose or Type Ahead"/>
Department	<input type="text" value="Choose or Type Ahead"/>	Fax	<input type="text"/>
Division	<input type="text" value="Choose or Type Ahead"/>	Pager	<input type="text"/>
Institution *	<input type="text" value="Choose or Type Ahead"/>	Email *	<input type="text"/>
Password *	<input type="text"/>	Confirm Email *	<input type="text"/>
Confirm Password *	<input type="text"/>	Notification Email	<input type="text"/>

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## View and Edit User Detail

To edit an existing user's information:

click on the *View Detail* link of the user row that you wish to modify...

1. Navigate to the *Management* module
2. Click on the *View Details* link in the far-right column of the user row that you wish to view or edit

Last Name	First Name	Primary Contact Number	User ID	Status	
Admin	Super	(123) 456-7890	SA123	Active	<a href="#">View Detail</a>
Approver	Final	(555) 555-5555	fa123	Active	<a href="#">View Detail</a>
ApproverP1	Final	(555) 555-5555	fa1231	Active	<a href="#">View Detail</a>
ApproverP10	Final	(555) 555-5555	fa12310	Active	<a href="#">View Detail</a>

3. This will navigate you to a read-only version of the user's data. To edit the user's data, click on the *Edit User* button
4. This will navigate you to the editable version of the user data form. Once you have made the necessary edits, click on the *Save* button to confirm your changes

Read only:

**Super Admin**

[Edit User](#)

Additional Details

First Name	Super	Primary Phone	(123) 456-7890
Middle Name		Secondary Phone	(123) 456-7890
Last Name	Admin	Credential	
User Id	SA123	Title	Final Approver
Role	Super Admin	Faculty Rank	
Department		Fax	(123) 456-7890
Division		Pager	(123) 456-7890
Institution	MGH	Email	sa123@fakek.edu
Notification Email			

Edit:

Home > Management > User Details > Edit User

Edit User

\* Required Field

First Name *	<input type="text" value="Jma"/>	Primary Phone *	<input type="text" value="(555) 555-5555"/>
Middle Name	<input type="text"/>	Secondary Phone	<input type="text"/>
Last Name *	<input type="text" value="Apple"/>	Credential	<input type="text" value="MD"/>
User Id *	<input type="text" value="sa123"/>	Title *	<input type="text" value="Final Approver"/>
Role *	<input type="text" value="Super Admin"/>	Faculty Rank	<input type="text" value="Instructor"/>
Department	<input type="text" value="Anesthesia"/>	Fax	<input type="text"/>
Division	<input type="text" value="Adolescent Medicine"/>	Pager	<input type="text"/>
Institution *	<input type="text" value="Demo Institution 3"/>	Email *	<input type="text" value="sa123@fakek.edu"/>
Password *	<input type="password"/>	Confirm Email *	<input type="text" value="sa123@fakek.edu"/>
Confirm Password *	<input type="password"/>	Notification Email	<input type="text"/>

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## Adding a User to a Study

Users with the following role types have access to all of the studies in their Scheduler System:

- Super Admin
- Resource Manager
- Scheduler
- Front Desk

The roles listed above have global access to studies. All other role types have to be managed and be given access to specific studies. In most cases, these other role types are generally study staff (investigators, research coordinators, study project managers, etc.) that should only be given access to their associated study.

To grant a user access to a specific study:

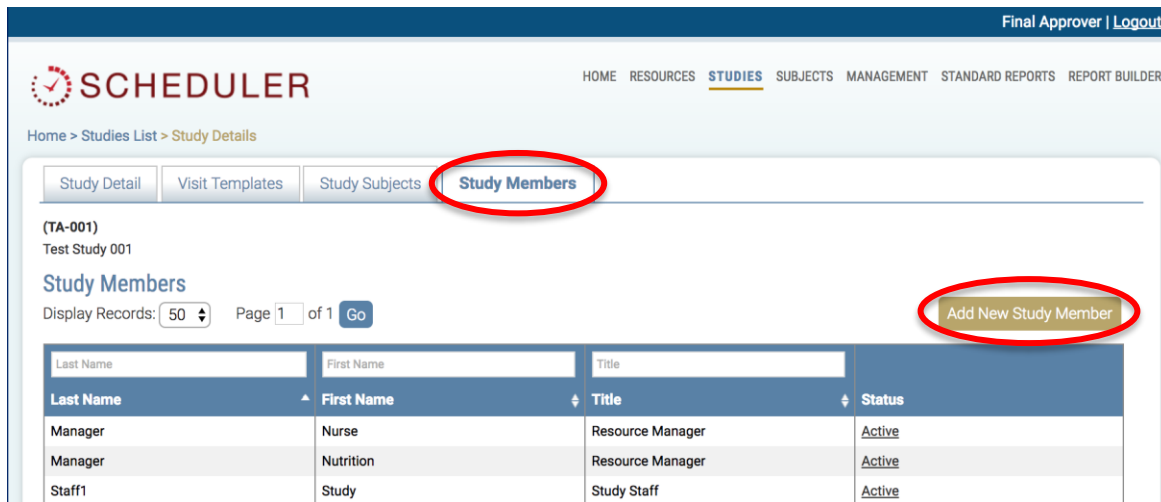
1. Click on the *Studies* module at the top of the screen
2. Click on the *View Detail* link in the far-right column of the row of the study to which you will add a user

The screenshot shows the Scheduler system interface. At the top right, it says "Final Approver | Logout". The main navigation bar includes "HOME", "RESOURCES", "STUDIES" (circled in red), "SUBJECTS", "MANAGEMENT", "STANDARD REPORTS", and "REPORT BUILDER". Below the navigation bar, there is a breadcrumb "Home > Studies List". The main content area is titled "Studies" and includes a search bar with "test Study" and a "Go" button. There are also "Display Records: 50" and "Page 1 of 1" indicators. A "Create New Study" button is visible in the top right of the content area. Below these elements is a table with the following data:

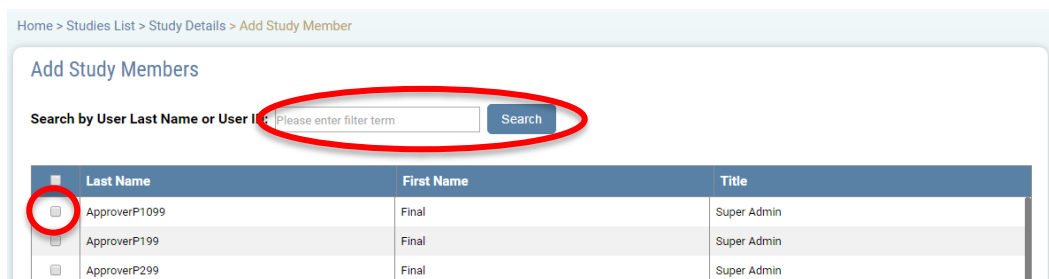
Name	PI Last Name	PI First Name	IRB Number	Local ID	Study Status	View Detail
Test Study 001	Staff1	Study	2001TA001	TA-001	OPEN	<a href="#">View Detail</a> (circled in red)
Test Study 002	Staff2	Study	2002TA002	TA-002	OPEN	<a href="#">View Detail</a>
Test Study 003	Manager	Nurse	2003TB003	TB-003	OPEN	<a href="#">View Detail</a>

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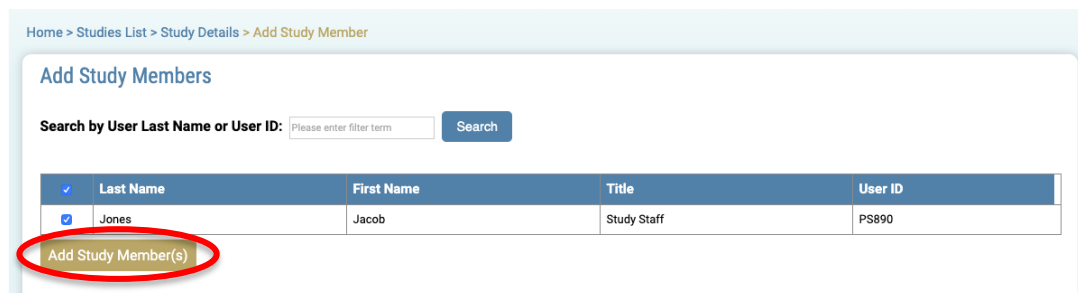
3. Click on the *Study Members* tab on the *Study Details Page*
4. Click on the *Add New Study Member* button on the *Study Members Page*



5. Search for the user by entering the *User Last Name* or *User ID*, then click on the user's checkbox in the first column of the table



6. Once you have selected the desired user, scroll to the bottom of the *Add New Study Members Page* and click on the *Add Study Member* button.



7. Once a user is added to a study, the user can view the details and schedule appointments for the study.

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## Deactivating a User

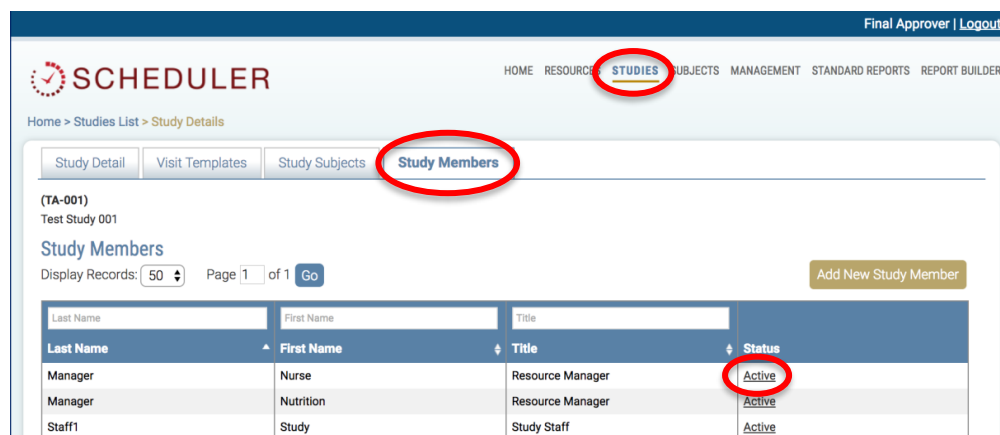
Once you create a user record, you cannot delete the record from your database. However, you can deactivate users from studies and/or deactivate users from the Scheduler System.

When a user is deactivated from a study, that user no longer has access to the *Study Details* including subject and appointment information of all studies to which the user has been assigned.

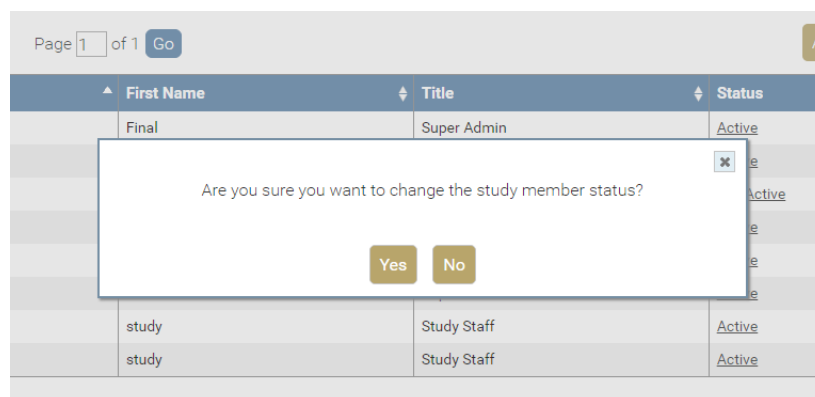
When a user is deactivated from the Scheduler System, that user can no longer log into the Scheduler Application.

### To deactivate a user from a study:

1. Click on the *Studies* module at the top of the screen
2. Navigate to the *Study Details* of the study from which you wish to deactivate the user and click on the *Study Members Tab*. Click on the *Active* link next to the user you wish to deactivate...



3. Confirm by clicking on the *Yes* button to deactivate the selected user



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## To deactivate a user from the Scheduler System

1. Navigate to the *Management* module, search for your desired user, and then click on the user's *Active* link

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	<a href="#">View Detail</a>
Approver	Final	(555) 555-5555	fa123	Active	<a href="#">View Detail</a>
ApproverP1	Final	(555) 555-5555	fa1231	Active	<a href="#">View Detail</a>
ApproverP10	Final	(555) 555-5555	fa12310	Active	<a href="#">View Detail</a>
ApproverP1000	Final	(555) 555-5555	fa1231000	Active	<a href="#">View Detail</a>

2. Confirm deactivation by clicking on the *Yes* button to deactivate the selected user

First Name	Primary Contact Number	User ID
Super	(123) 456-7890	SA123
Final	(555) 555-5555	fa123
Final		
Final		
Final		
Final		
Final	(555) 555-5555	fa1231003
Final	(555) 555-5555	fa1231004

Are you sure you want to change the status of the selected user?