

Administrators

As an administrator of Complion, you have an additional area you can view and access. This area will be referred to as the Admin Area. It can be accessed at any time via the Key icon in the top right of your screen.

The Admin Area is organized into three main tabs that allow you to manage your organization's Complion instance; Users; [Groups](#); and [Data Sources](#).



Users

When you click on the Key icon you will be taken to the Users screen by default. From this screen you can manage existing users or create new ones.

Creating Users

In order to create a new user, first select "Create User" at the top of the Users screen.



This will take you to the Create User screen. Input fields with the orange check mark are required..

The screenshot shows the 'Users' section of the Complion application. At the top, there is a navigation bar with the 'Complion.' logo, a 'Create User' button, and user information (User: user@complion.com). Below the navigation bar, there are tabs for 'Users', 'Groups', and 'Data Sources'. The 'Users' tab is active, displaying a search bar and filters. The user list includes:

- Jason Admin | ACTIVE**: Email: jason+admin@complion.com, Last Login: 11 Sep 2017 02:13 PM, Created: 23 Aug 2017, Groups: (6), Registration: Completed. Groups: Complion Hospital Administrator, Complion Hospital Admins, Complion Hospital Investigators, Complion Hospital Monitors, Complion Hospital Reg Specialist/Coordinator, Complion Hospital Users.
- Jason Beder | ACTIVE**: Email: jason.complion@gmail.com, Last Login: [blank], Created: 17 Aug 2017, Groups: (6), Registration: Completed. Groups: Complion Hospital Administrator, Complion Hospital Admins, Complion Hospital Investigators, Complion Hospital Monitors, Complion Hospital Reg Specialist/Coordinator, Complion Hospital Users.
- Jarred Bournigal | ACTIVE**: Email: jarred@complion.com, Last Login: 22 Oct 2018 01:08 PM, Created: 04 Apr 2018, Groups: (2), Registration: Completed. Groups: Complion Hospital Administrator, T.C. Williams Monitors.
- Jarred Bournigal | ACTIVE**: [Partial entry visible at the bottom].

The 'Create User' form includes the following fields and options:

- back to users**: A link to return to the user list.
- Email Address**: A text input field with a calendar icon on the right.
- Display Name**: A text input field.
- First Name**: A text input field.
- Last Name**: A text input field.
- Groups**: A dropdown menu with the following options: Groups, Complion Hospital Administrator, Complion Hospital Investigators, and Complion Hospital Reg Specialist/Coordinator.
- Login Method**: A dropdown menu.
- Create User**: An orange button to submit the form.
- Reset values**: A button to clear the form fields.

Email Address: This information cannot be changed once the user is created. Complion will send an email to this address with a link to begin the account creation process. The email address will act as the unique identifier for the user.

Display Name: The display name can be whatever your organization chooses, but our recommendation is to use the first and last name of the user. This information can be changed later if necessary.

First And Last Name: This information can be changed later.

Groups: The groups selected determine the permissions users are granted throughout Complion. If you are unsure what group to which a user should belong, you may want to speak with your Complion representative to determine which is the best fit.



*Note: You must select the appropriate user group **AND** the “All Users” group. This can be accomplished by holding the control key on your keyboard and clicking both groups.*

Login Method: There should only be one method choice labeled “Password”.

Note: If you use Single Sign On authentication, you will have an additional option. This will be discussed with your Complion Representative.

User Actions

Each user has a menu titled “Quick User Actions”. With these options, you can edit a user, reset a password, deactivate a user, or reset their account.



Edit: From here you can change a user’s display name, first and last name, and permission group(s).

Reset Password: This will send the user an email to initiate the password reset process.

Activate/Deactivate: Depending on the user’s current status this option will either read Activate or Deactivate. If you deactivate a user they will no longer be able to login to Complion. If you reactivate them they will have their account restored to its last active state.

Account Reset: If a user is locked out of their account due to too many failed login attempts, you will need to perform an account reset. This will send them an email to restart account registration. Anything in the auditable record will remain in the record, including signatures.

Groups

The Groups tab will show you all of your pre-set permission groups in Complion. If you select one, it will take you to the group's specific page where you can see all users assigned to this group.

The screenshot shows the Complion interface with the 'Groups' tab selected. The top navigation bar includes the Complion logo, a user profile for 'user@complion.com', and links for Help, Change Password, Admin, and Logout. Below the navigation bar are three tabs: 'Users', 'Groups', and 'Data Sources'. A search bar is present with the text 'Search groups by associated user name or group name'. The main content area displays a table of groups with the following data:

Name	Description	Is Searchable	Document Types	Users
Complion Hospital Administrator	All Admins	Searchable	17	9
Complion Hospital Investigators	Complion Hospital Investigators	Searchable	16	6
Complion Hospital Reg Specialist...	Reg Specialists and Coordinators	Searchable	17	7
All Users	All Users	Searchable	0	0

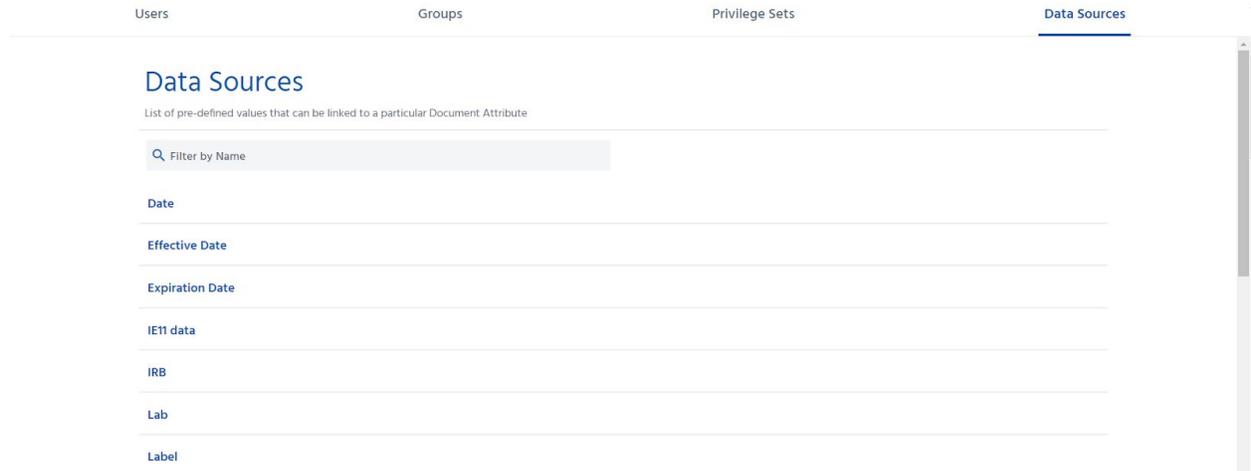
You can also quickly add users to this group by using the “Add this user to Group” function, as well as quickly remove users in the group by using the “Remove this user from Group” function.

The screenshot shows the details for the 'Complion Hospital Administrator' group. It includes metadata such as Display Name, Description, Users (9), Document Types (17), and Priority. Below this is a search bar for users and a table listing the group's members with options to add or remove them.

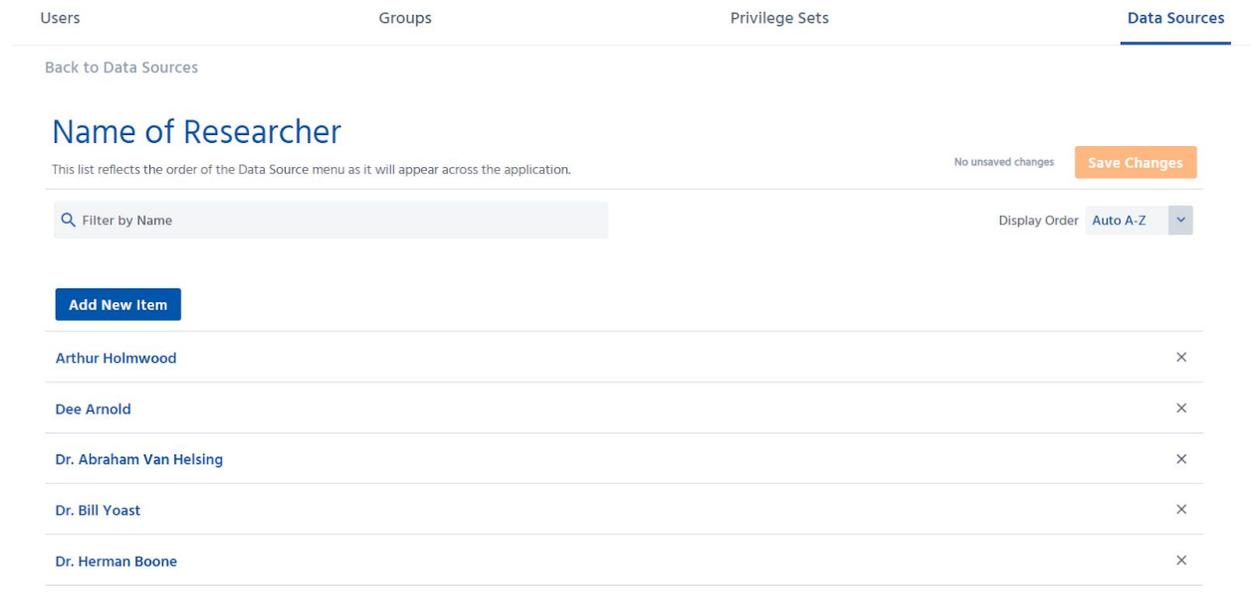
Display Name	Email	Member of Group	Add / Remove
Jason Admin	jason+admin@complion.com	Yes	Remove Jason from Group
Jason Beder	jason.complion@gmail.com	Yes	Remove Jason from Group
Jarred Bourmignai	jarred@complion.com	Yes	Remove Jarred from Group
Jarred Test 7/25	jarred+test725@complion.com	Yes	Remove Jarred from Group
Jarred	jarred+test@complion.com	Yes	Remove Jarred from Group
Jarred	jarred+123@complion.com	No	Add Jarred to Group
Jarred Complion Hospital	jarred+ch@complion.com	Yes	Remove Jarred from Group
User	user@complion.com	Yes	Remove User from Group
Jason Coordinator	jason+coordinator@complion.com	No	Add Jason to Group
Brian Farrell	bfarrell@complion.com	No	Add Brian to Group
Anuj Gupta	anuj+ch@complion.com	No	Add Anuj to Group
Jason Investigator	jason+investigator@complion.com	No	Add Jason to Group
Jaime	jaim+admin@complion.com	No	Add Jaime to Group

Data Sources

Data Source Values are used to fill out the dropdown menus used in filing documents and creating binders. The data used to file a document comes from a data source. As the admin it is your job to maintain these Data Sources. Select the Data Source Tab. You will first see your Data Source List by default. This list contains organized sets of Data Source Values.

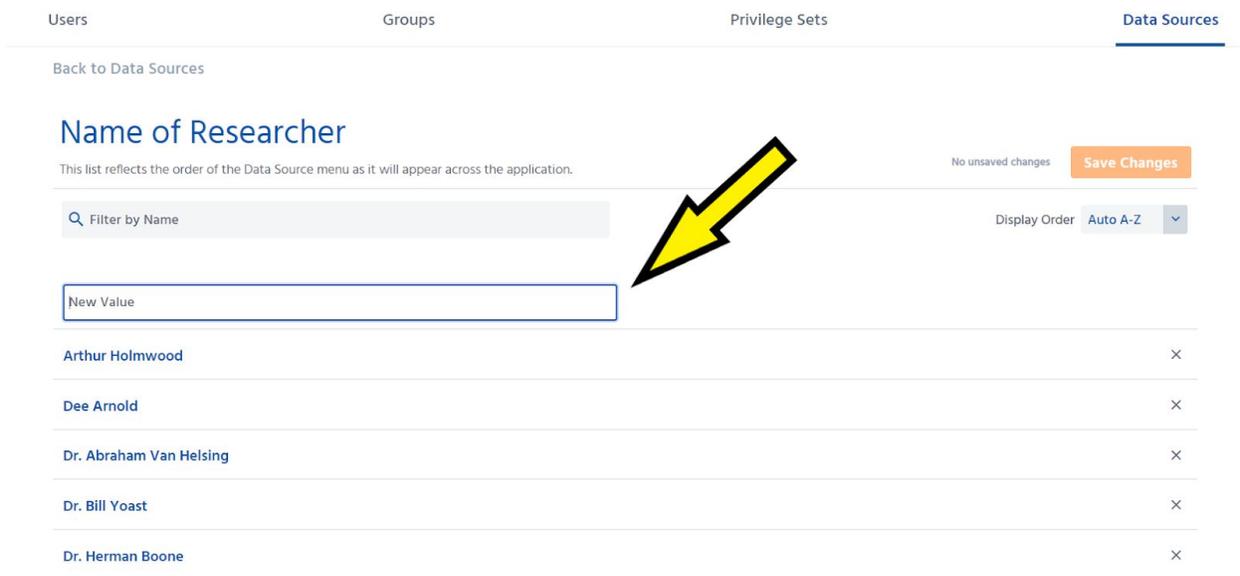


Clicking on a Data Source List will allow you to manage it (in the example below, we've selected the Name of Researcher Data Source List).



Adding a Value:

To add a data source you can start by selecting "Add New Item" at the top of the Data Source page. This will bring up a blank value line at the top of your data source list. Here you can enter the new value name.

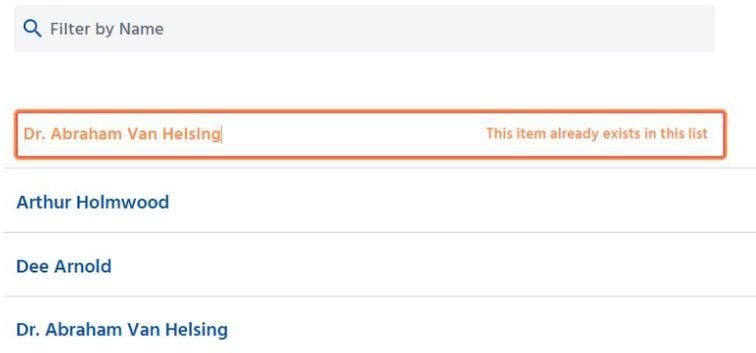


The screenshot shows the 'Data Sources' page with the 'Name of Researcher' section. At the top, there are navigation tabs for 'Users', 'Groups', 'Privilege Sets', and 'Data Sources'. Below the tabs, there is a 'Back to Data Sources' link. The main heading is 'Name of Researcher', followed by a sub-heading: 'This list reflects the order of the Data Source menu as it will appear across the application.' There is a search bar labeled 'Filter by Name' and a 'Save Changes' button. A yellow arrow points to the 'New Value' input field. Below the input field is a list of existing researchers: Arthur Holmwood, Dee Arnold, Dr. Abraham Van Helsing, Dr. Bill Yoast, and Dr. Herman Boone, each with a delete icon (x).

Please note that you will be unable to add any duplicate Data Source Values. Attempting to do so will remove the add button, and you will receive an error.

Name of Researcher

This list reflects the order of the Data Source menu as it will appear across the application.



The screenshot shows the 'Name of Researcher' section with a search bar labeled 'Filter by Name'. Below the search bar, the 'Dr. Abraham Van Helsing' value is highlighted in a red box with the message 'This item already exists in this list'. Below this, the existing list of researchers is shown: Arthur Holmwood, Dee Arnold, and Dr. Abraham Van Helsing.

If you attempt to exit the page without saving your changes, you will be prompted to do so.

Unsaved Changes

You have made updates to this Date Source without saving.

Would you like to Save these changes and close the list, or close without saving?

Cancel

Exit Without Saving Save and Exit

Removing a Value:

Should you need to remove a Value, simply click the X on the right hand side of that Data Source Value. You will be asked if you're sure you want to remove the item.

Remove from List

If you remove this item it will no longer be visible in this list, or available in the data source dropdown menu. This **will not** remove it from any binder setup pages or documents where it has been attached.

Cancel

Remove from List

Please note: You may need to remove a Data Source Value from the Binder Setup page to remove it entirely from the Binder.

Explanatory Tip

The Data Sources page is one of our most recently updated features! Data Sources contain the information used to label and classify your documents. These are maintained by the Admin, and can be edited as needed, such as when a Researcher departs a study.

Example

In order to select an option on any dropdown list, you first need to have items to select! Adding data source values will allow you to populate and choose dropdown menus in Complion. To select a Name of Researcher, such as Dr. Victor Frankenstein, that name must be manually typed as a Data Source Value. Once saved, you can select this option when filing a document.

What the System is Doing

In the example above, the system is taking the Name of Researcher that you have added, and allows it to be applied to the appropriate documents. It will become an integral part of the filter between the Central Binder and Study Binders, allowing only the proper documents to be pulled into the appropriate Study Binder.

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