Instructions for creating new users and assigning them to the sites in CRDR platform

A. Steps in creating a New Site

1. Use the link: https://crdr.phfi.org/<proj>STAGE/Default.aspx
2. Log-in as "**Data Manager**" (User name: *archana.bhattacharya@phfi.org*)
3. Navigate to "*Create sites*" under "Other Activities"
4. Provide the necessary details in the page (Country, Country code, Site code, Site name, Site location, Time zone and Expected enrollment)
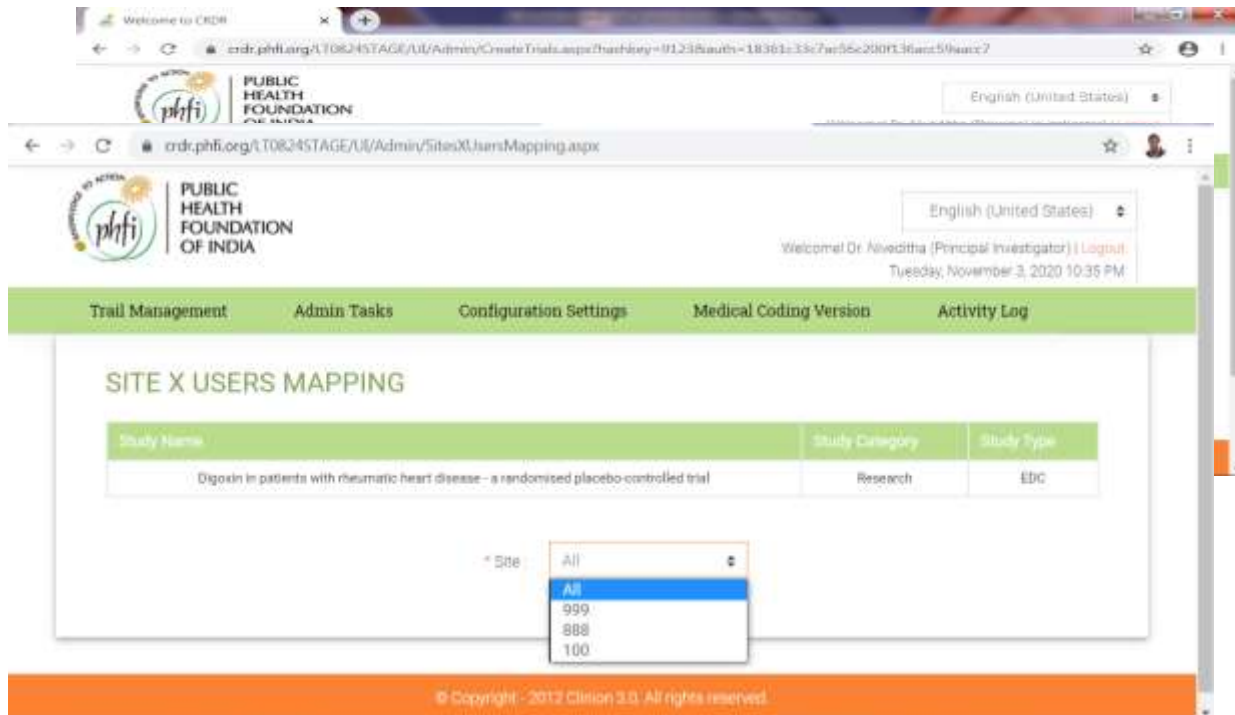5. Upon submitting the site will be created

B. Steps in requesting for new user
1. Use the link: https://crdr.phfi.org
2. Log-in as "**Principle Investigator**" (User name:*<DR>@iiphd.org*) /DM can do
3. Navigate to "*Request for User*" under "Admin Tasks"
4. Select the role. (Note: There can be only one Investigator per site. If needed more, create users as Co-Investigators)
5. Selection"**Production User**" as we wanted to create user in Live server.
6. Provide a valid email ID of the user/investigator. (IMPORTANT: User will receive an email with login credentials and password. You can as well use the email Id of the user as username. Username section also accepts email ids.)
7. Submit the request to the Super Admin (Mr. Shishant)
8. Once SuperAdmin approves the request, the user/investigator will receive an email with login credentials.
9. User will be able to view the assigned study details or will be listed in for site assignment only after Superadmin(Mr.Shishant) assigns the user to study. Superadmin will perform this activity through " StudyXRolesX Users Mapping".

C. Steps in assigning new user to the site
1. Use the link: https://crdr.phfi.org/<proj>STAGE/Default.aspx
2. Log-in as "**Principle Investigator**" (User name:*dprabhakaran@phfi.org*)

3. Navigate to "***Sites X User Mapping***" under "Admin Tasks"

4. Site ID will show you the list of available sites in the study. Select the site ID for which you want to assign this new user

5. Upon selecting the site, it will show the list of users available. Select appropriate users to the site. (Eg. New user **<iiphd_test1>**is assigned to the site **888**)

6. Click on "Assign" to assign the user to the site
7. After assigning, the user (iiphd_test1) can start entering data for the site 888.
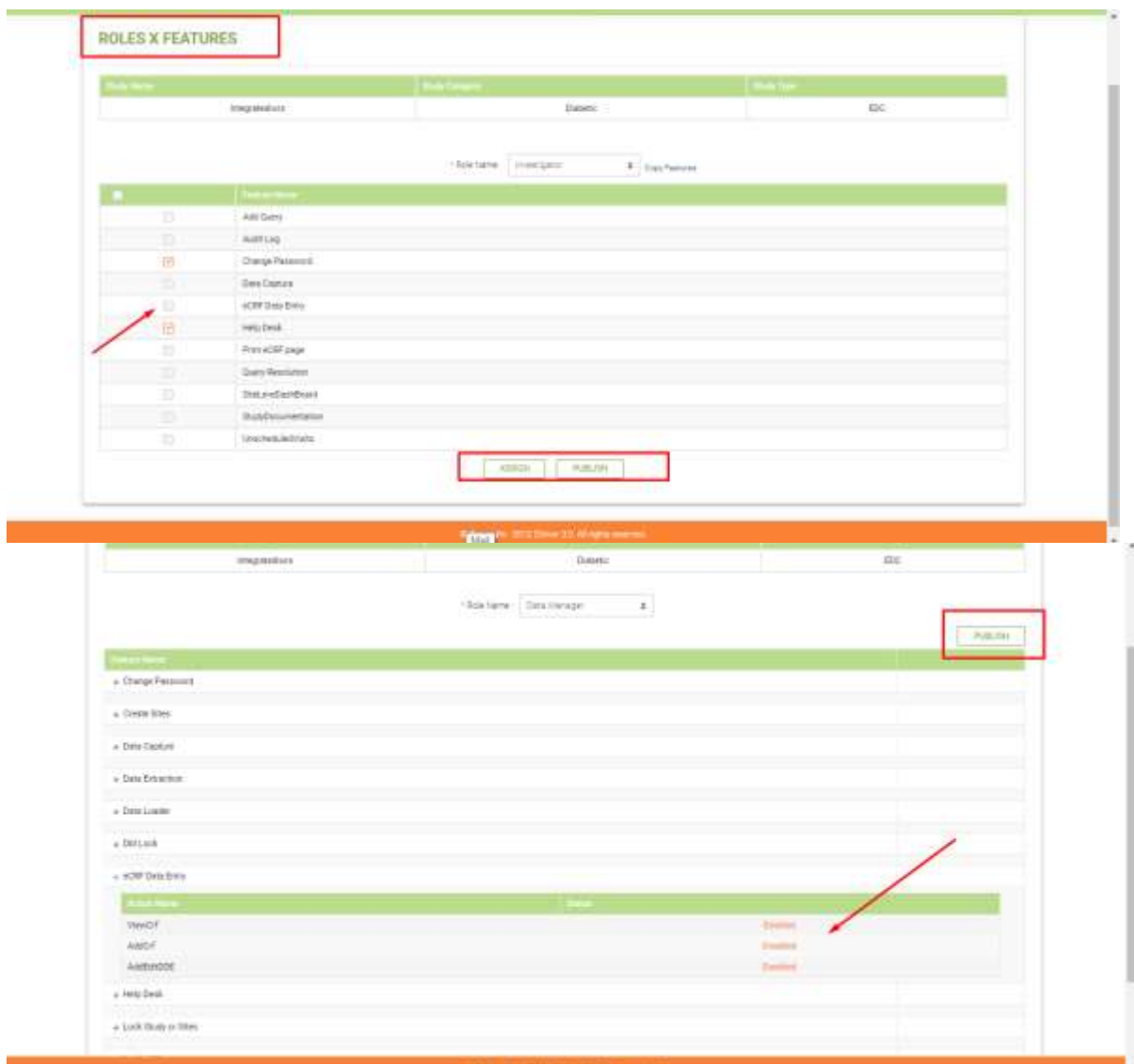
8. After login as investigator, if the screen display as "You do not have permissions to access Dashboard. Please contact administrator." then follow the below steps.

8.1 Login as Studyadmin (PI) in the stage URL of the study.
(https://crdr.phfi.org/<Proj>STAGE/Default.aspx).

8.2 Mouse over on the Admin task .

8.3 Click on the Roles X Features Management

8.4 Selected the role and assign the feature respectively .

8.5 Click on the Assign and Publish.

8.6 Mouse over on the Admin task .

8.7 Click on the Roles X Action Management

8.8 Selected the role and enable or disable the feature respectively based on the roles activity
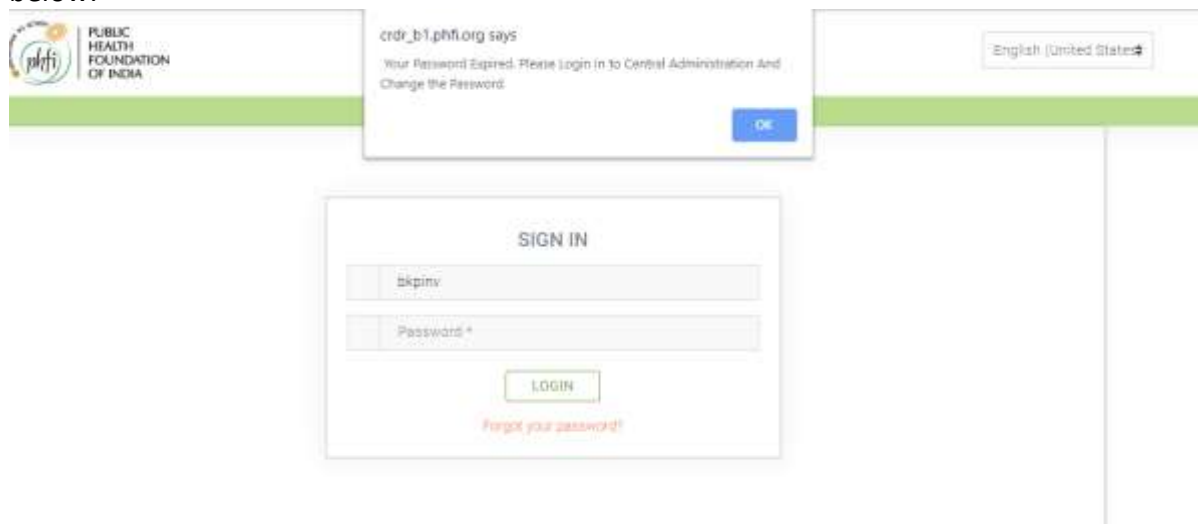
8.9 Click on the Publish

D. Activation of new user (For the first time – From user end)

Once the user has been approved by the Super Admin (Mr. Shishant), the user will receive an email with login and password details. To active the user for the first time, please follow the below steps:

1. Use link: https://crdr.phfi.org
2. Enter the user name and password as in the email
3. Upon submitting, a verification code will be sent to the user's registered email id
4. Provide the verification code
5. System will ask you to enter new password (customize your password)
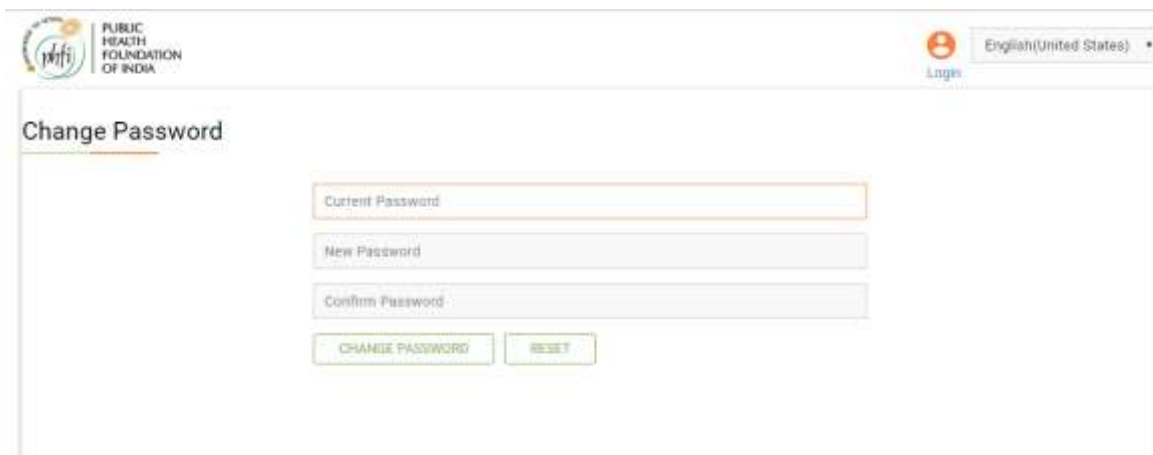6. Submit. The new password will be used hereafter.

E. Setting up Expired password (For the first time – From user end)

When your password gets expired, you will receive an alert notification on the screen as below:

1. Use link: https://crdr.phfi.org to login.
2. Use the same credentials, Username and password(current password) to login.
3. System navigates you to password reset page.

4. Enter the current password and new password details.
5. After changing the password you can login in to
   https://crdr.phfi.org/<proj>STAGE/Default.aspxand continue the study activities.

To unlock/ activate an user if they were locked:
1. Log in as PI e.g - <dprabhakaran@phfi.org>
   2. Under Admin task -> User management -> Unlock