Steps to be followed to during Study Course once the Study Configuration is completed.

Step 01: Study is published to Stage/Production after Configuration is completed.

Step 02: Study link is available with the PI team.

Step 03: Login in to "crdr.phfi.org" as PI and Request for required role and Required role and Required users. PI can request for roles and User for his study using "Request for Role" and " Request for User" options under "Admin tasks" module.

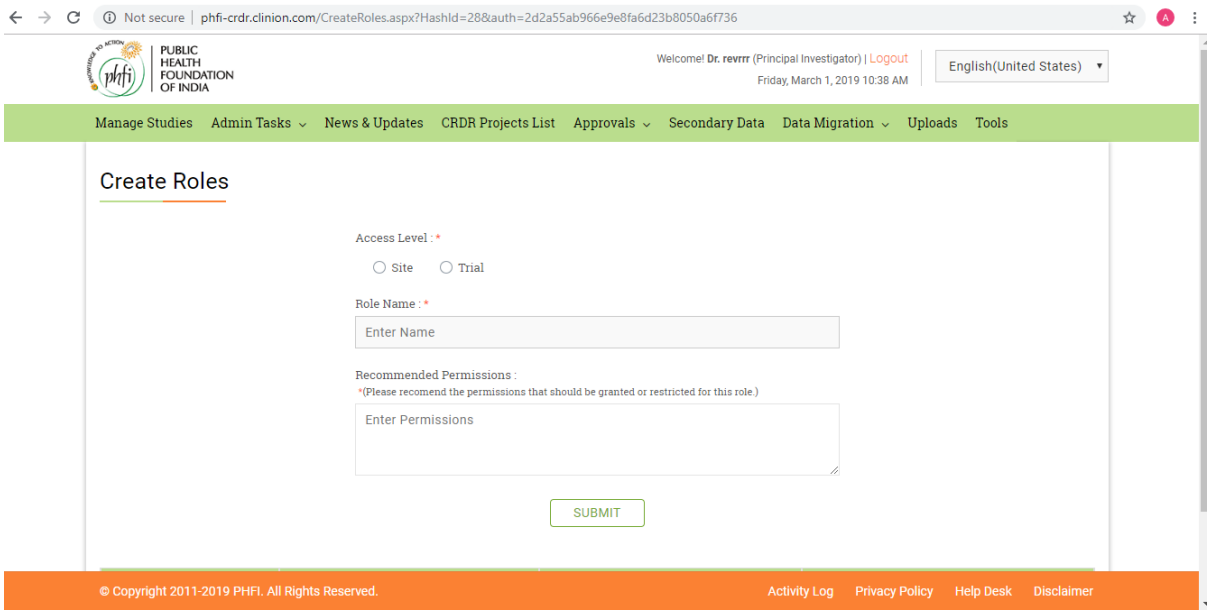
Request for Role

Using this menu PI user can Request any recommended roles to be added to the study. Both Site level as well as trail level users can be added. The request for addition of roles shall be sent to super admin user for approval.

The request can be raised using

- Access Level: A radio button selection to select "Site" or "Trail" level users.
- Role Name: Role recommended
- Recommended permissions: The required permissions for the role to be approved can be given here.

On clicking the Submit button, the Role request will be sent for Approval of the Super admin user. And the details are available in the table below. If user tries to enter the Role that already exists in system, system displays the message "Role Already Exists" up on submission.



CRDR-User Manual

Request for User

Request to create a user is initiated using this menu. Upon approval of Central Admin the user creation will be completed and username will be activated.

To create a user request, the following details need to be submitted

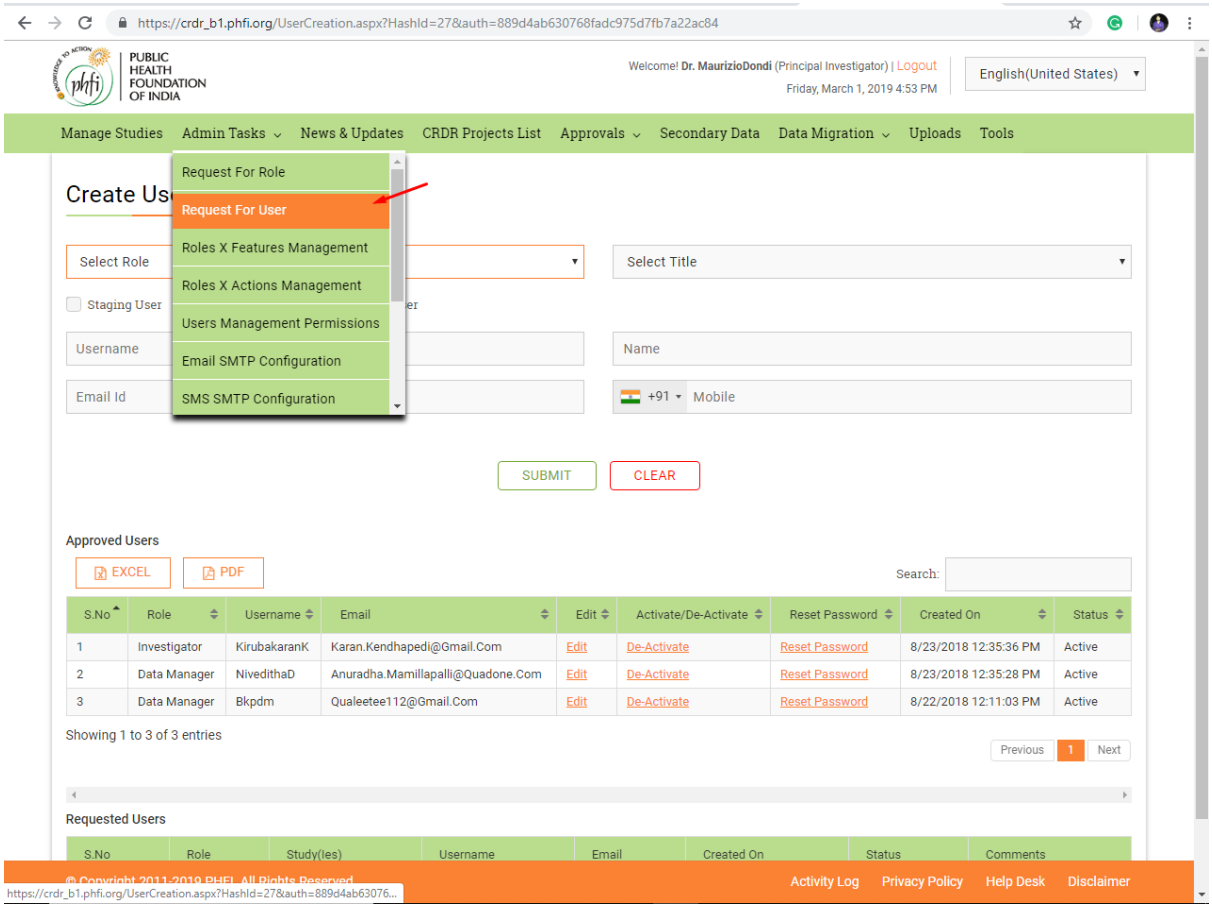
I. Select Role: Drop down to select the required role name.
II. Select Title: drop down menu to select the desired title for the user.
III. Username
IV. Name
V. Email Id
VI. Mobile number

The later part of page contains two table grids Approved Users and Requested Users.

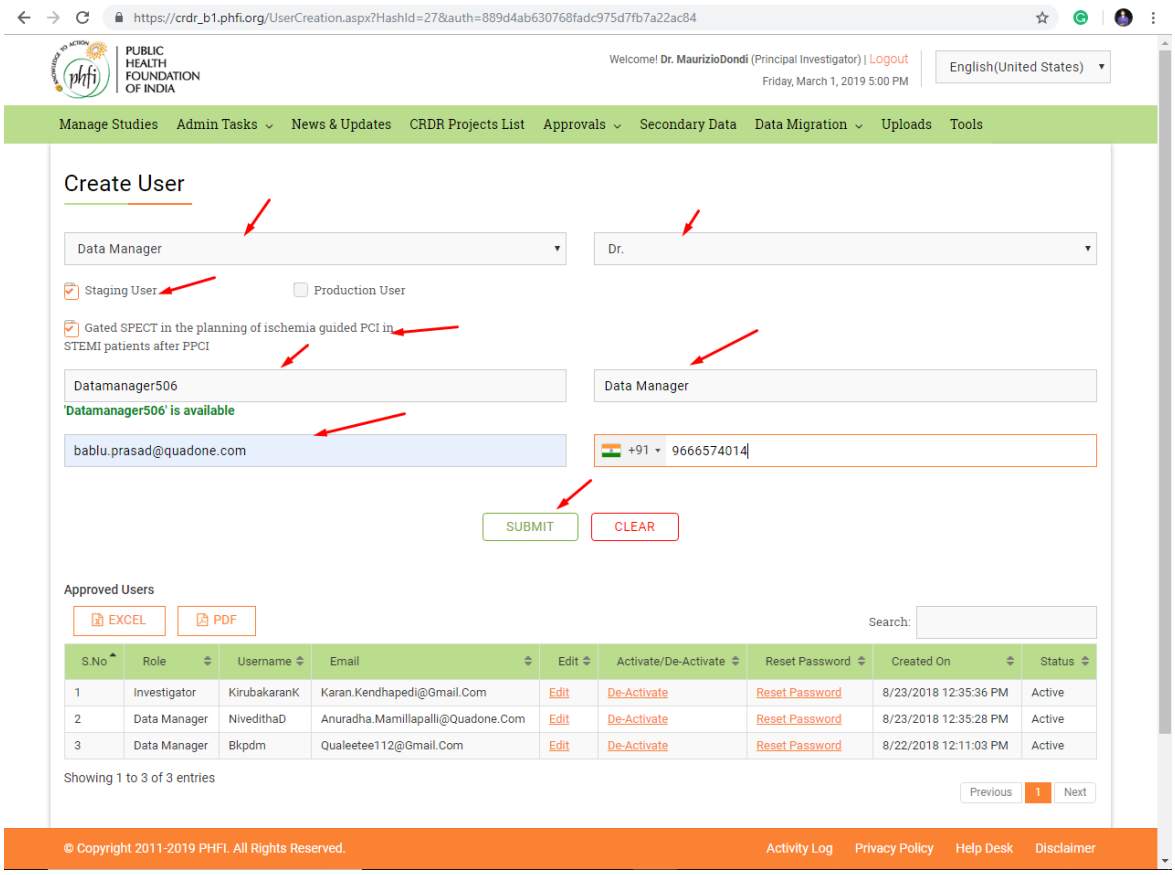
Approved Users: The user creation requests for which Central Admin approval is completed will be listed here.

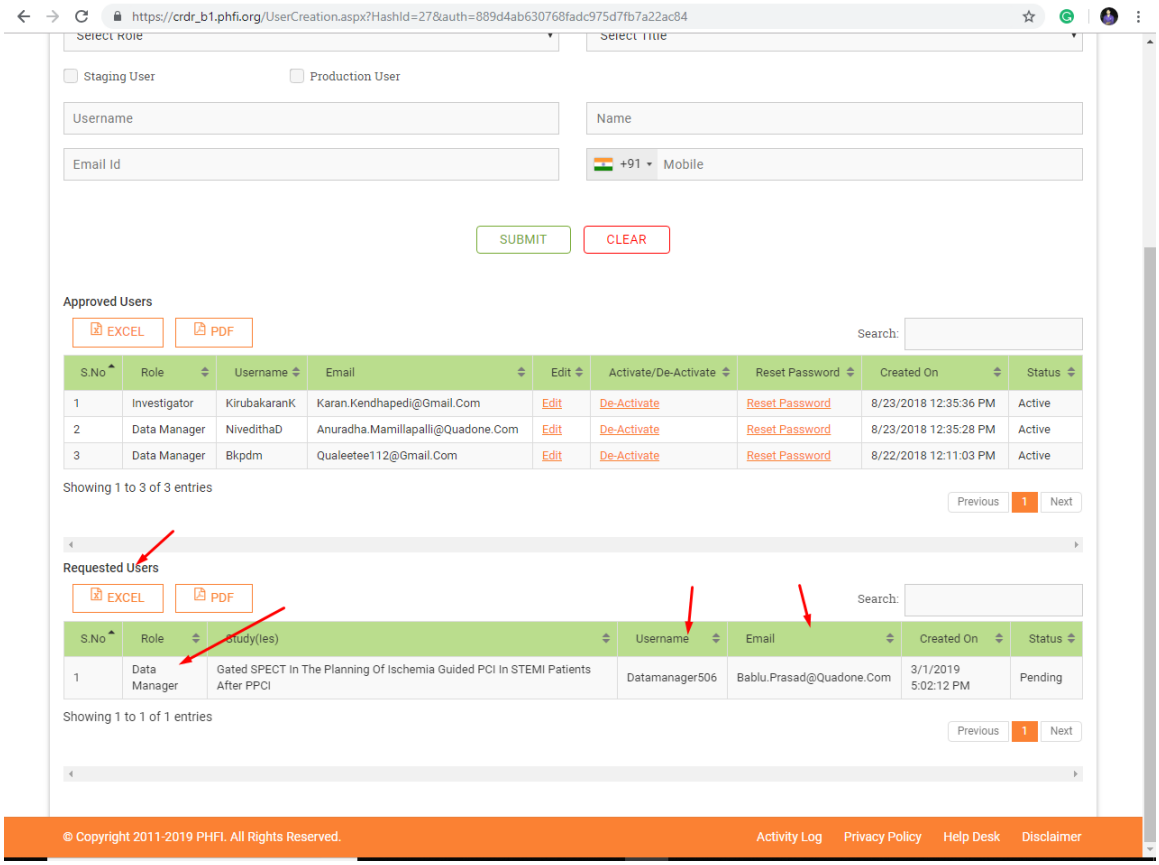
Requested Users: The user creation requests for which the Central Admin is still pending will be listed here.

Reference:

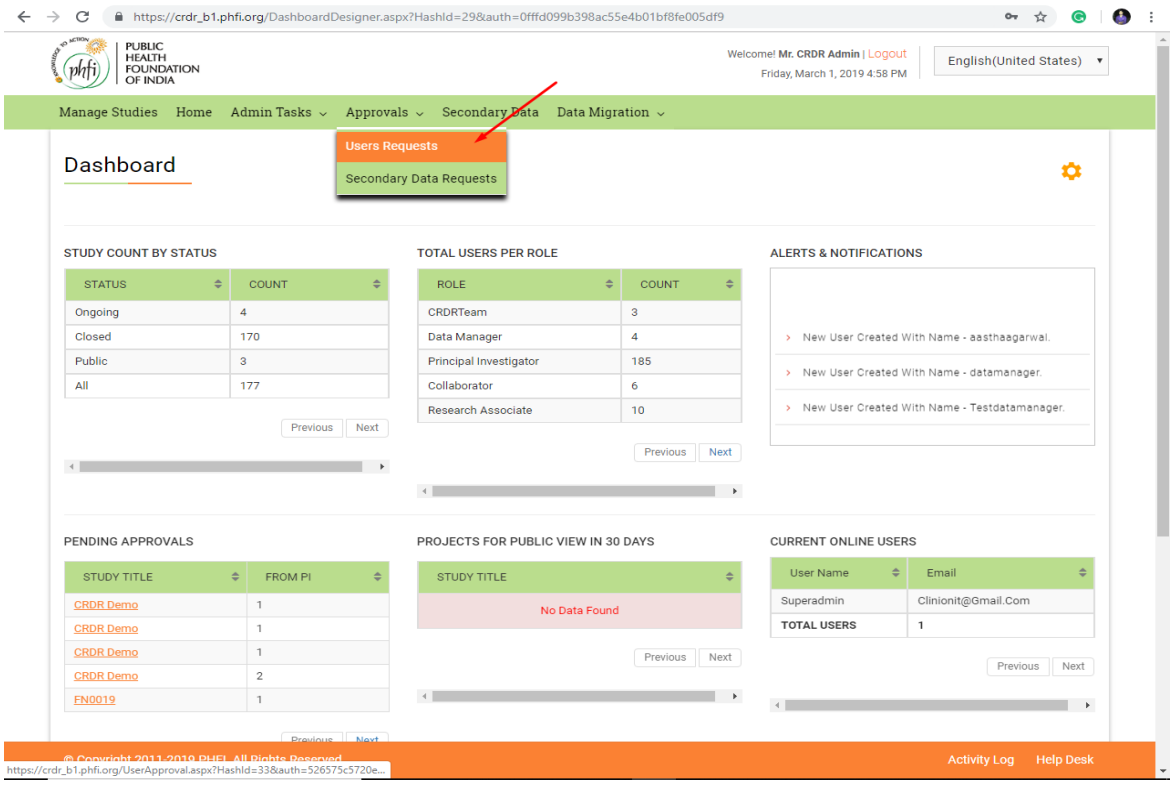


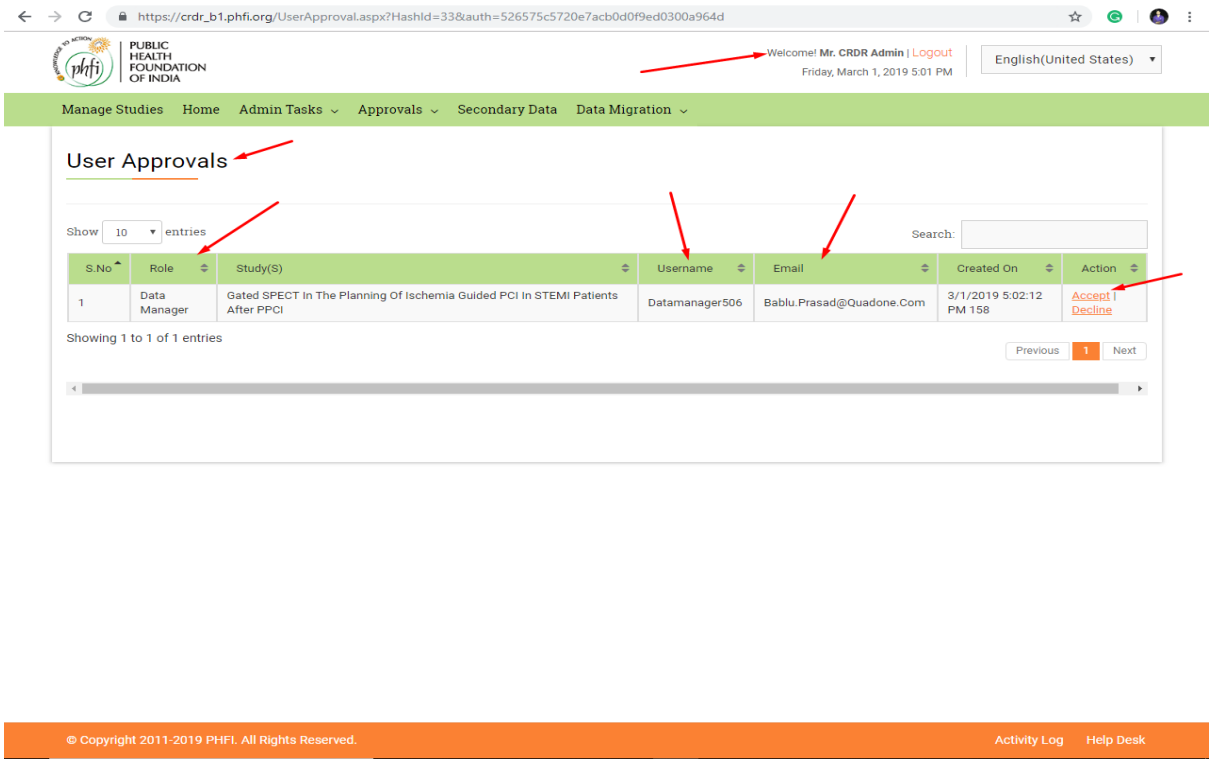
CRDR-User Manual



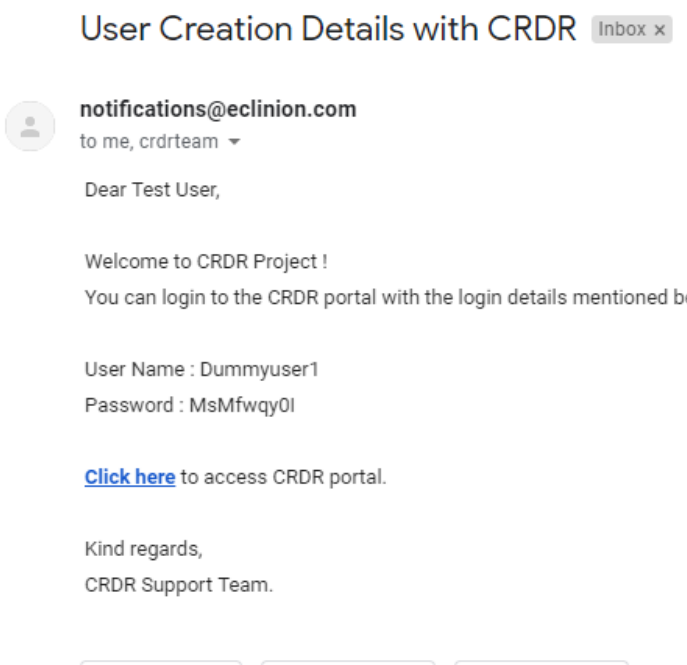


Step 04: An email notification shall be sent to the Super admin for the approval. Super admin user will Approve and assign the user to the Study using Study X Users Mapping.





Step 05: Upon approval an email notification with User name and Temporary Password details shall be sent to users.



User Creation Details with CRDR Inbox ×

notifications@eclinion.com
to me, crdrteam

Dear Test User,

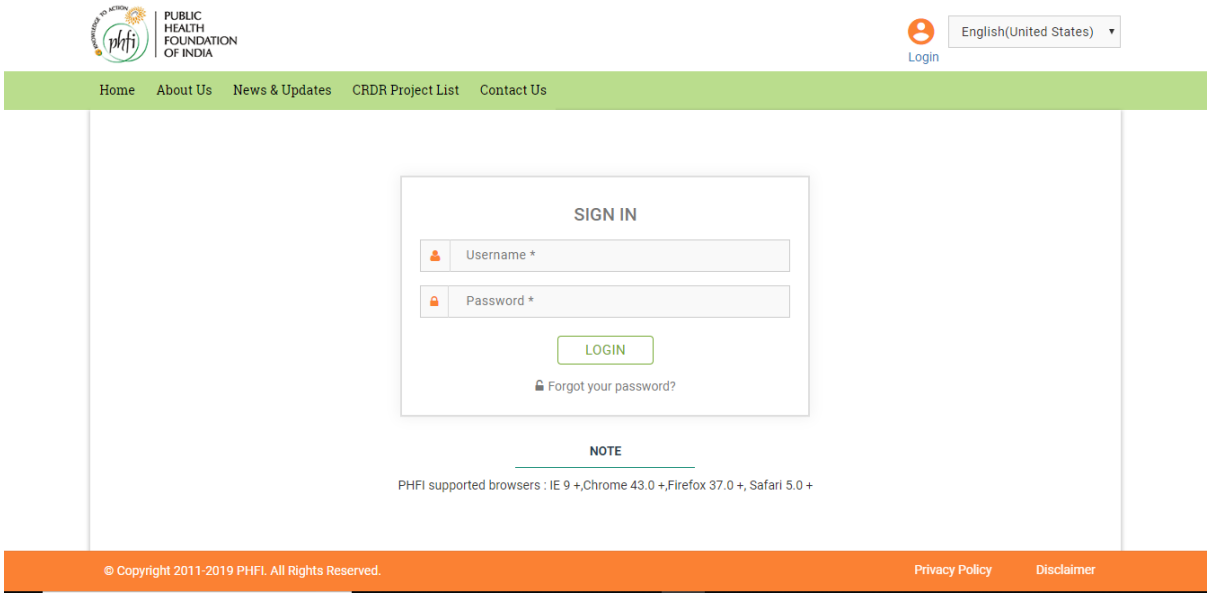
Welcome to CRDR Project !
You can login to the CRDR portal with the login details mentioned below:

User Name : Dummyuser1
Password : MsMfwqy0l

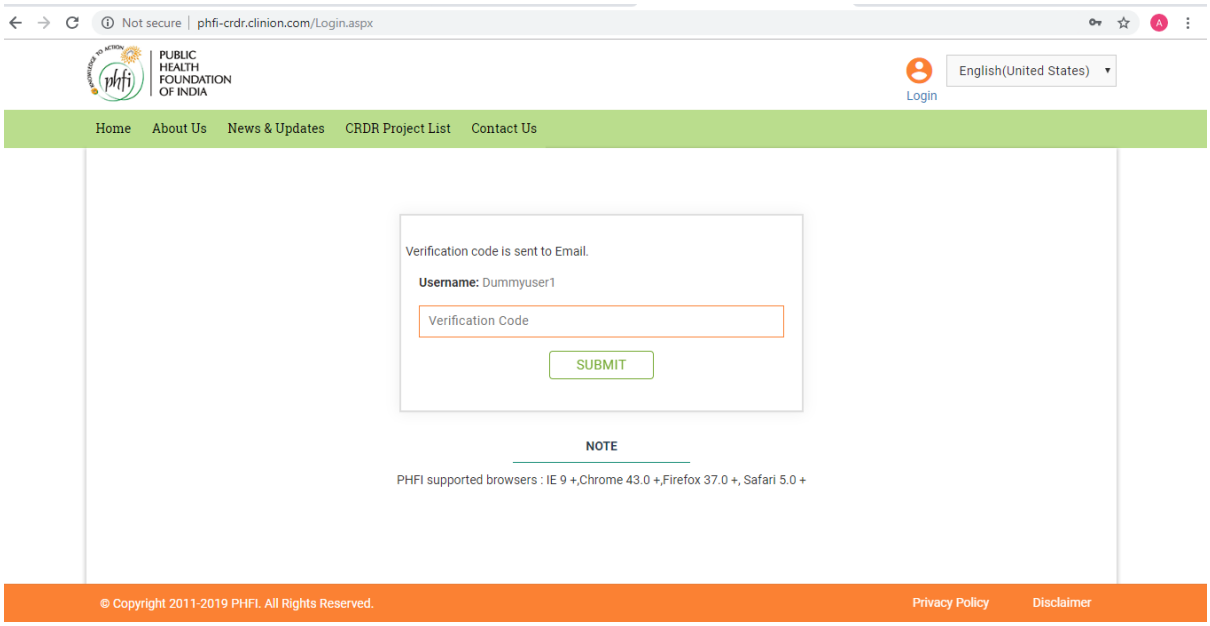
Click here to access CRDR portal.

Kind regards,
CRDR Support Team.

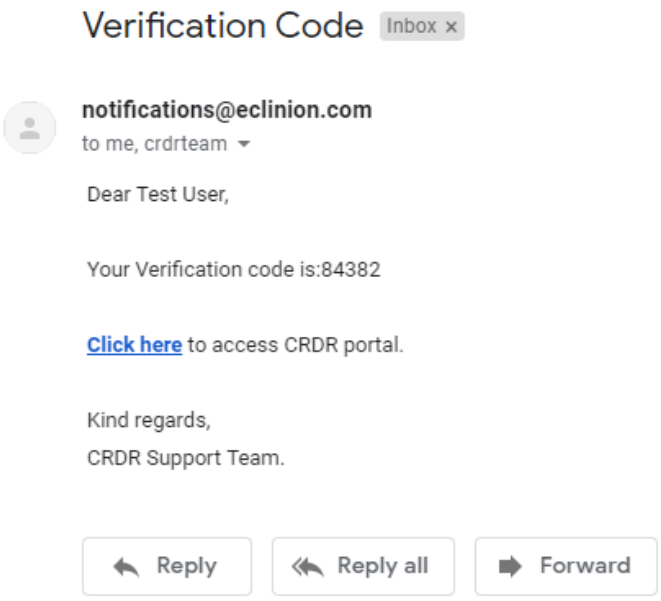
Step 06: User shall login using "**crdr.phfi.org**" with the given Username and Password details.



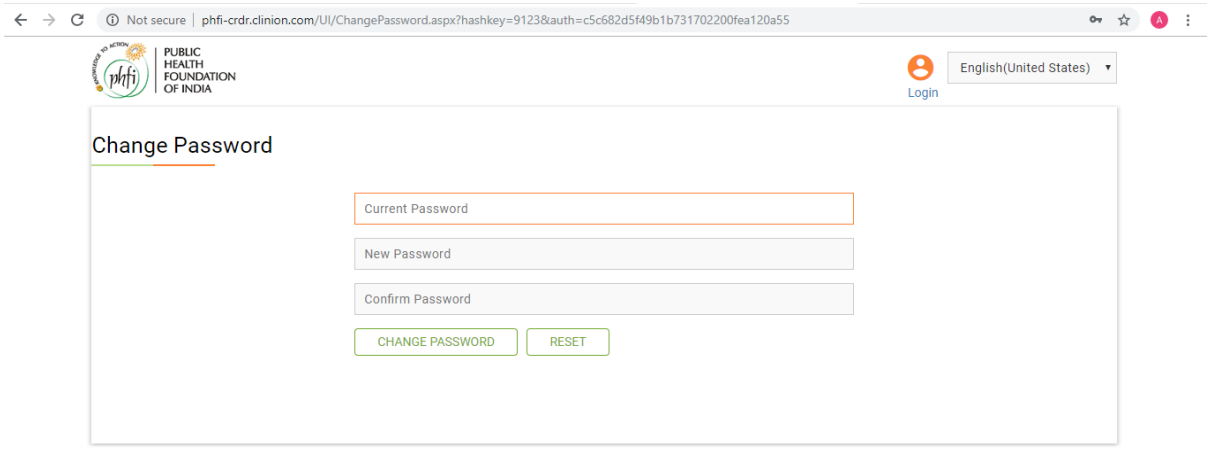
On logging in system will pop up a message to enter the verification code. User shall receive the verification code on the registered email id.



An email notification shall be sent to user on the registered email id.

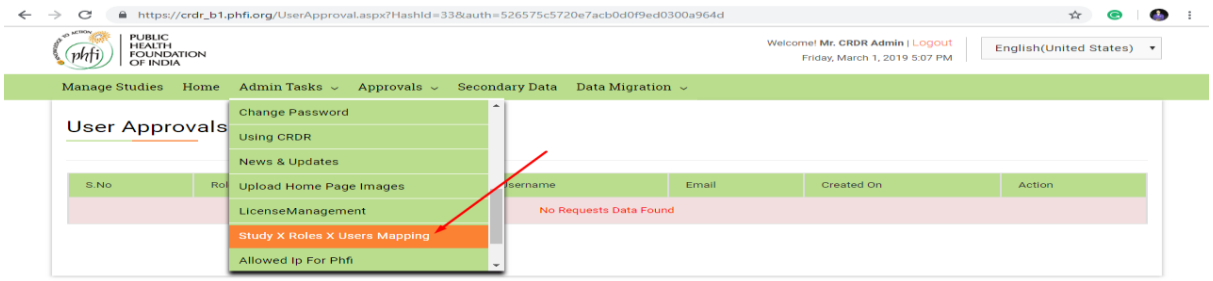


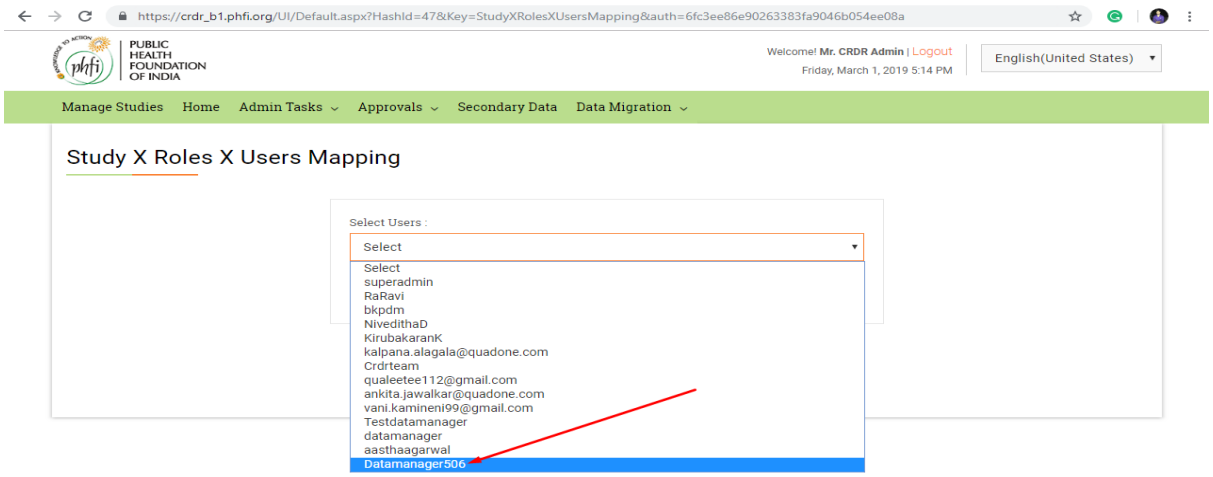
Step 07: On submitting the verification code, system navigates user to “Change Password Page”.



User needs to enter the Current password (password received through email) and desired password at New password and Confirm password sections. On resetting the Password the user logs in to the CRDR system.

Step 08:- Now login with Superadmin with valid credentials and navigate to the **Admin Task** header menu and select the '**Study X Roles X Users Mapping**' submenu, Select the created user from user drop down and then click the **Assign Users** button and then **Publish** button.





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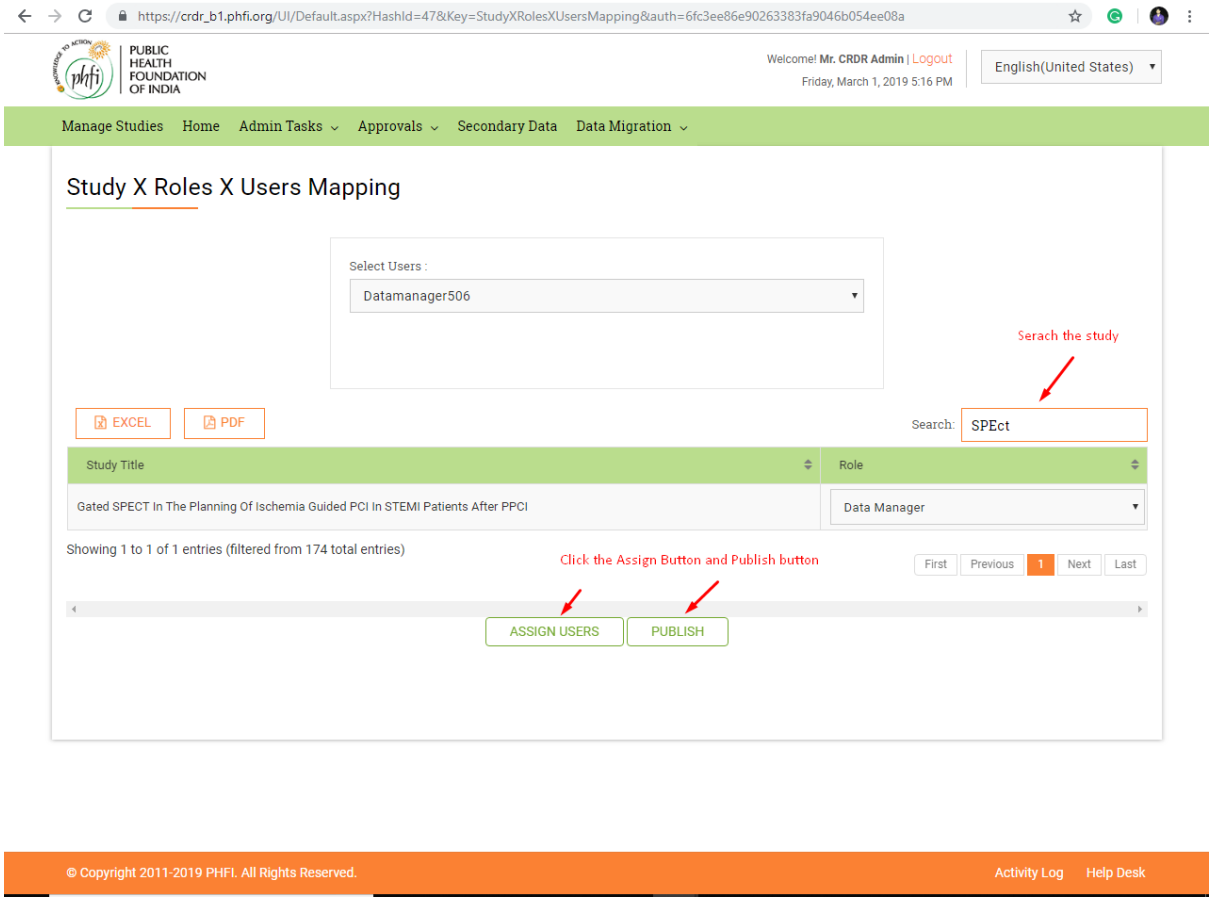
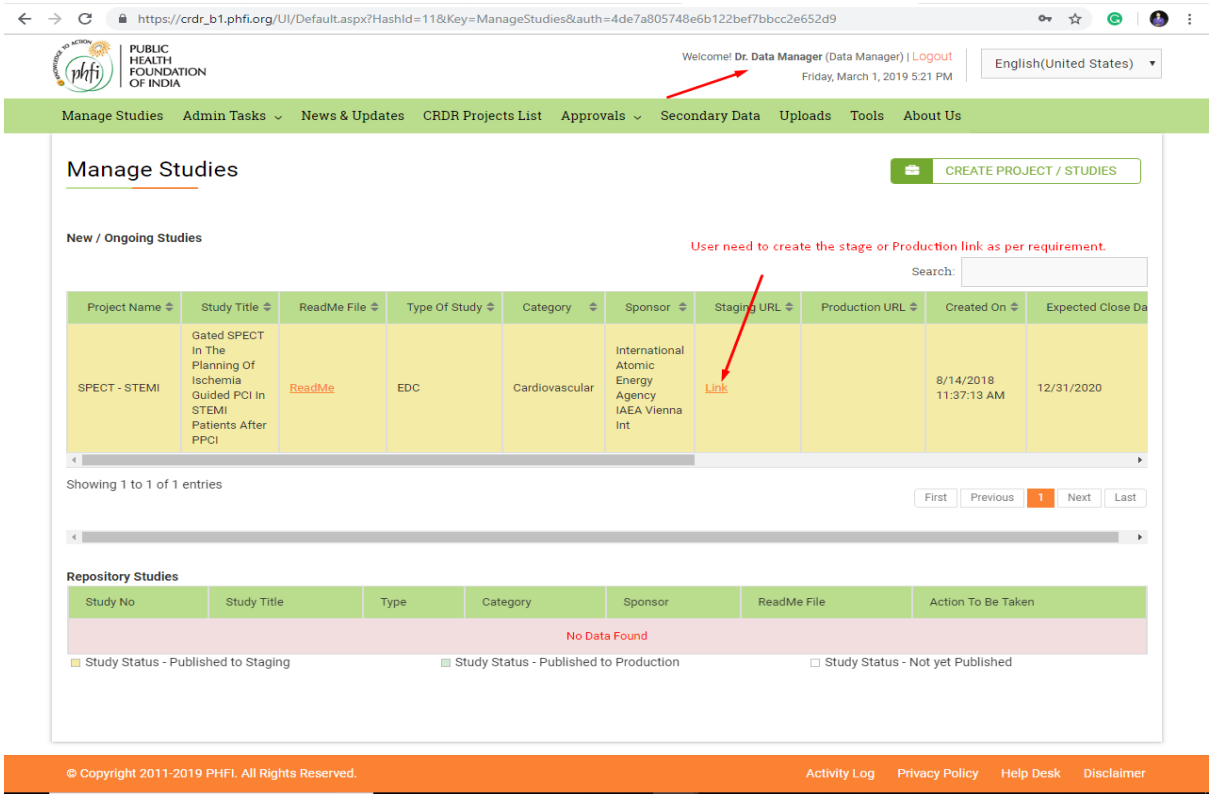
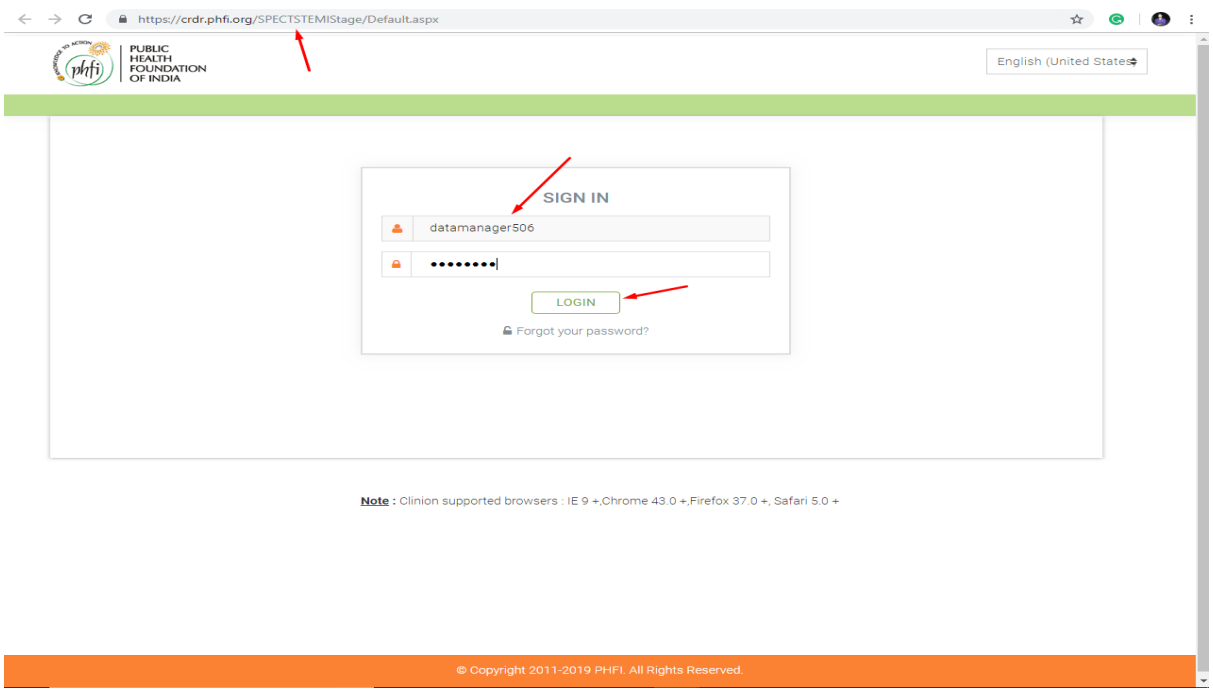
CRDR-User Manual

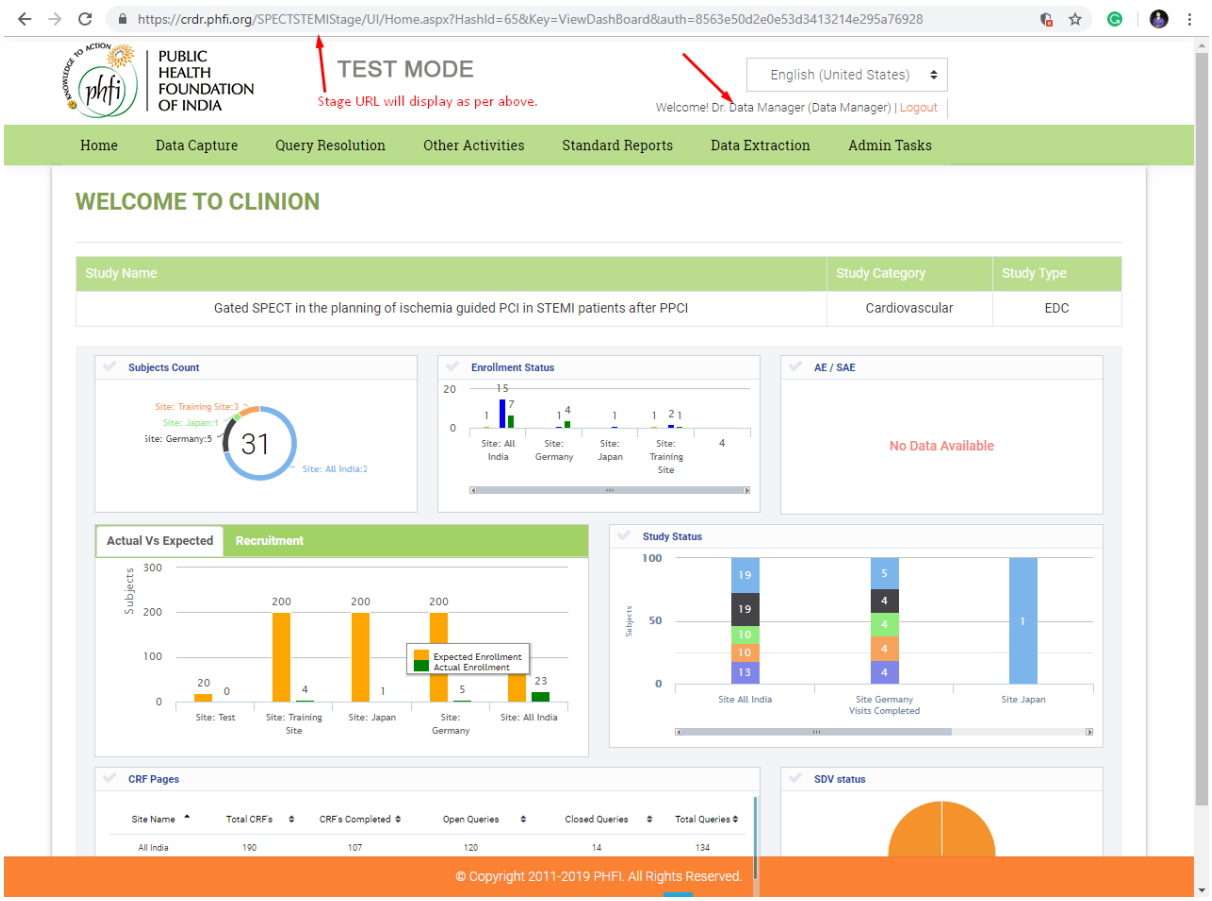


Step 09: On logging in using "crdr.phfi.org" with the Username and Password details, User logs in to CRDR system. All the studies assigned to him/her are available in Manage studies page. User can click on respective study Stage or Production link to navigate to the study.



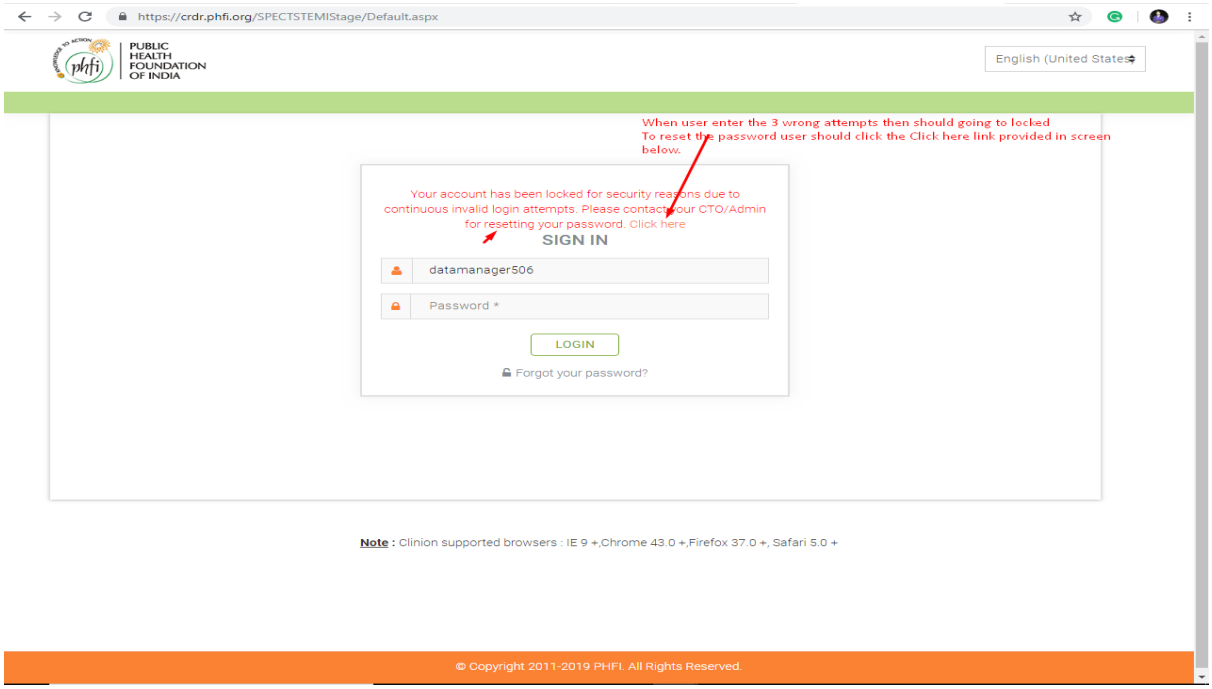


CRDR-User Manual

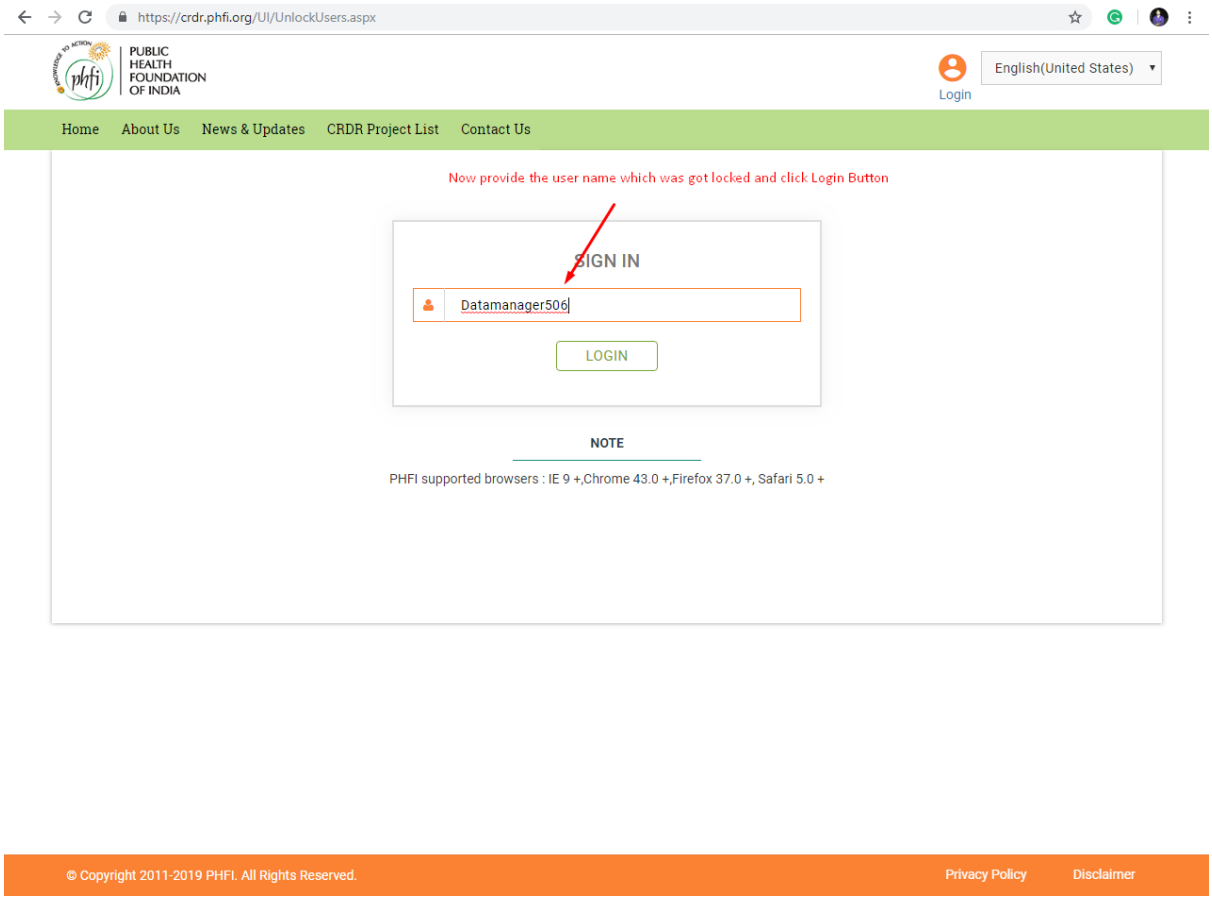


***For the first time /or for resetting the password, user should log in in to "crd.phfi.org" url.**

Note:- When user enter the 3 wrong attempts then should going to locked To reset the password user should click the Click here link provided in screen below.

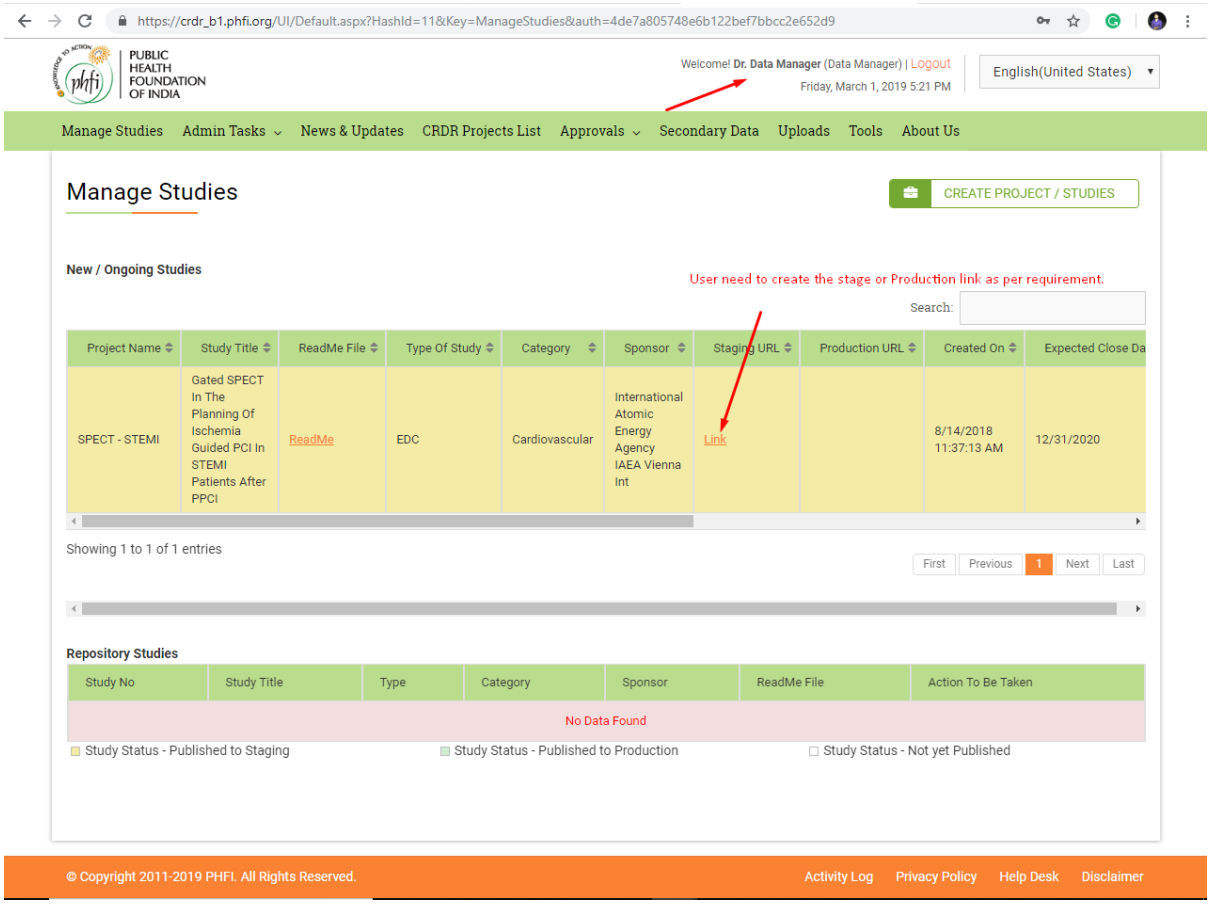


Now provide the user name which was got locked and click Login Button as per below screen.



And password have got sent to the particular user mail.

***If the password details ae set, then user can directly access the study using study link**



https://crdr.phfi.org/XXXXXXXXXXX/Default.aspx.