Document Setup

Import Documents

▶ Drag and Drop

▶ Browse

▶ Email

▶ Fill Placeholder

Florence

Upload Documents: Drag & Drop in Binder/Folder

Why?
Ease of locating desired file and new location in Florence

How?
- Locate File(s) on computer or Browser download bar
- Identify desired location in Florence where you would like to place file
- Drag and drop file(s) into dotted box

Common Uses
Drag from emails, desktop, bulk folders, and browser download trays

Florence eBINDERS™

AdventHealth - Cert UAT

Settings ▾   Lauren Martin ▾

Search
Announcements
Global View
Binders
Reports
Dashboard
My Downloads
Need Help?

Binders > Cardiovascular

CREATE NEW ▾   ACTIONS ▾   Filter by...

Type Name ▾   Count Last Modified   Actions

☐ 📂 Central Binder   0   09-Jul-2019 @ 11:16 AM EDT   ⋮

☐ 📂 Study 1   0   07-Oct-2019 @ 9:51 AM EDT   ⋮

Import Documents

Drag files here or **browse** .

✉ IMPORT VIA EMAIL

Look for dotted box!

Florence

Upload Documents: via Browser

Look for BLUE "browse"
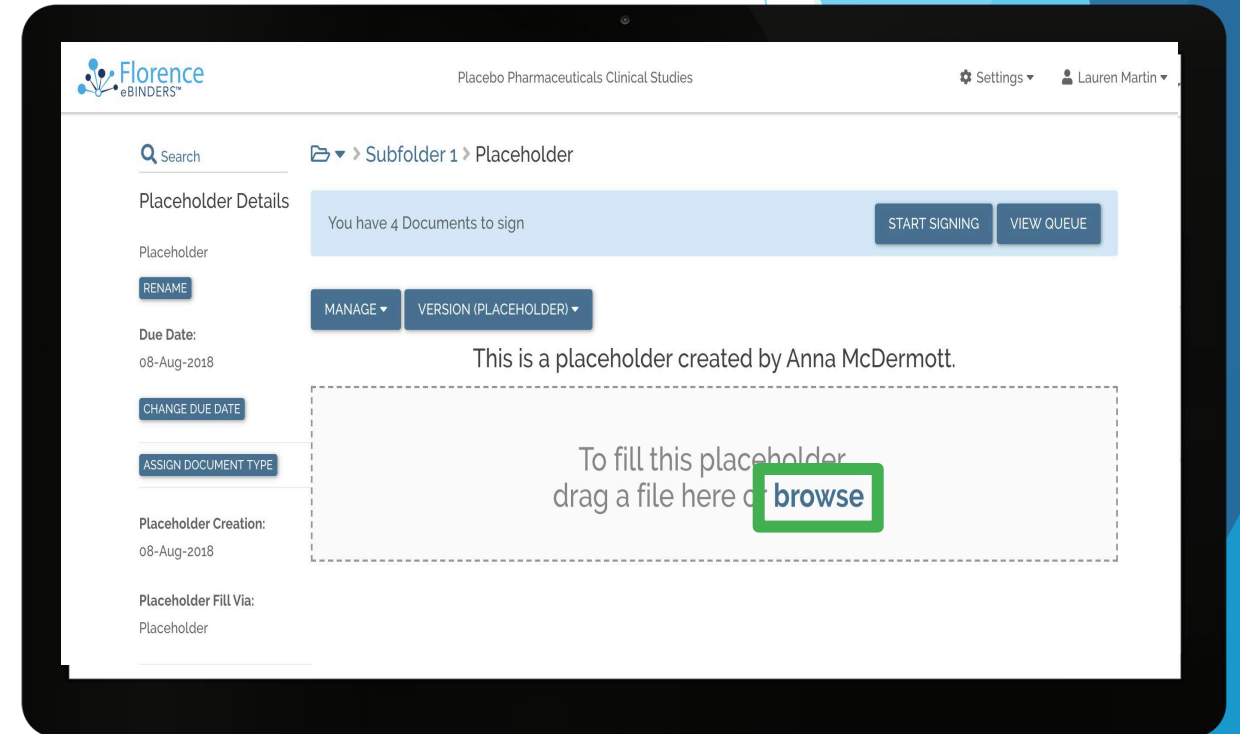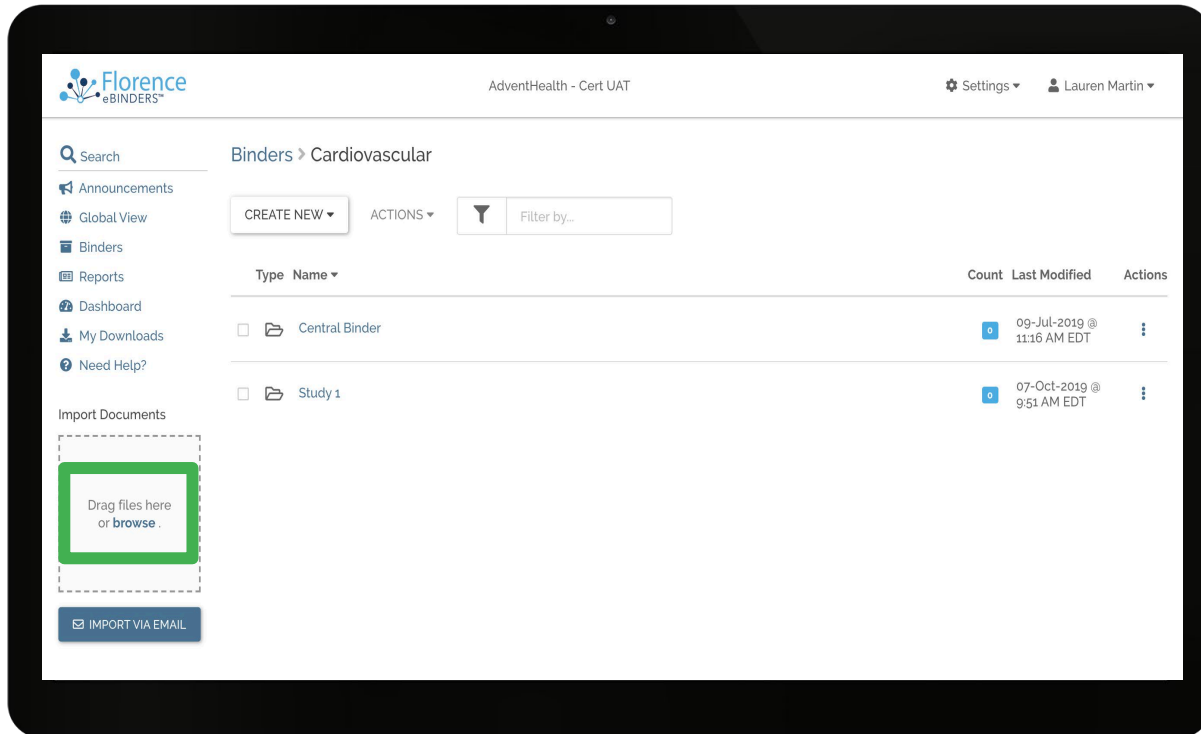
To upload a Document via Browser, simply click on Browse in the dotted box and select a document from your desktop to upload.

Upload Documents: Email Connector

Why?
Desired Document or correspondence is in email

How?
1. Select Import via Email
2. Click "Copy to clipboard"
3. Paste unique email address into email client
4. The email subject will become the document name in Florence for ease of locating email correspondence

Common Uses
- Maintaining trail of authenticity to include email content and "Related Document" status
- Correspondence Documentation
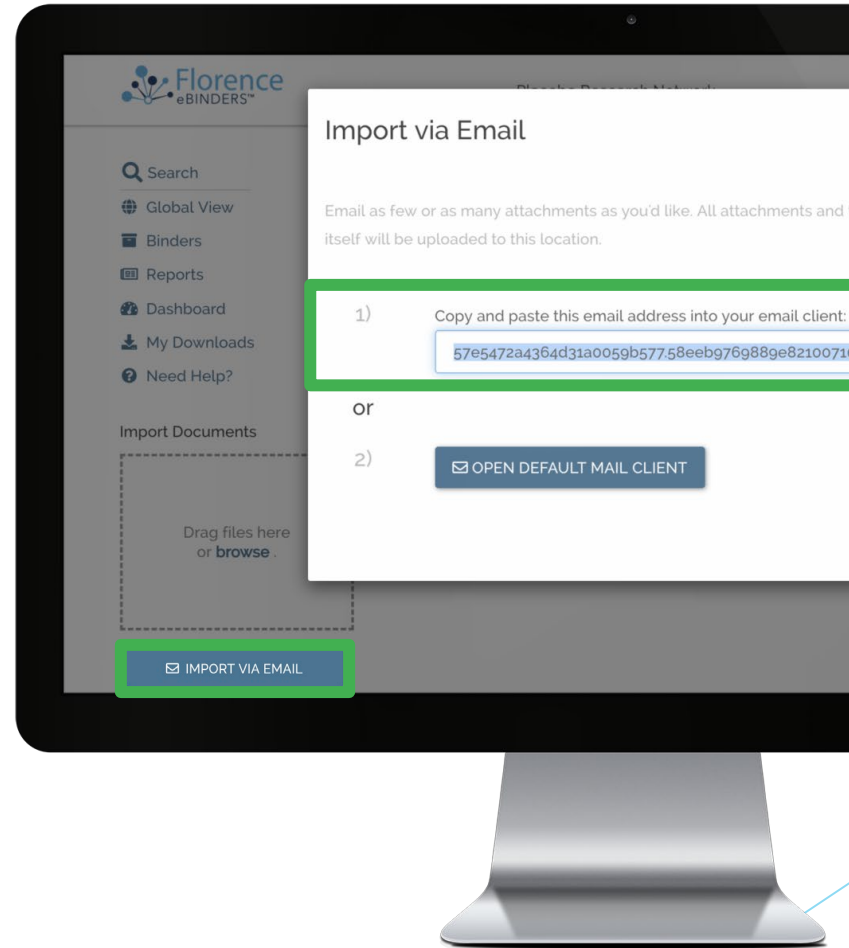
Create new contact

First name: Springfield General Hospital
Last name: Communication Binder
Company:
Job title:
Email: 57e5472a4364d31a0059b577.58eeb9
Label:
Phone:
eBinder Communications Binder for Site

Florence eBINDERS™

- Search
- Global View
- Binders
- Reports
- Dashboard
- My Downloads
- Need Help?

Import Documents

Import via Email

Email as few or as many attachments as you'd like. All attachments and the itself will be uploaded to this location.

1) Copy and paste this email address into your email client:
57e5472a4364d31a0059b577.58eeb9769889e82100710a89.59666

or

2) ☐ OPEN DEFAULT MAIL CLIENT

Drag files here or **browse** .

☐ IMPORT VIA EMAIL

11 MAY 2019 - Communications Binder Training

Springfield General Hospital Communication Bi...
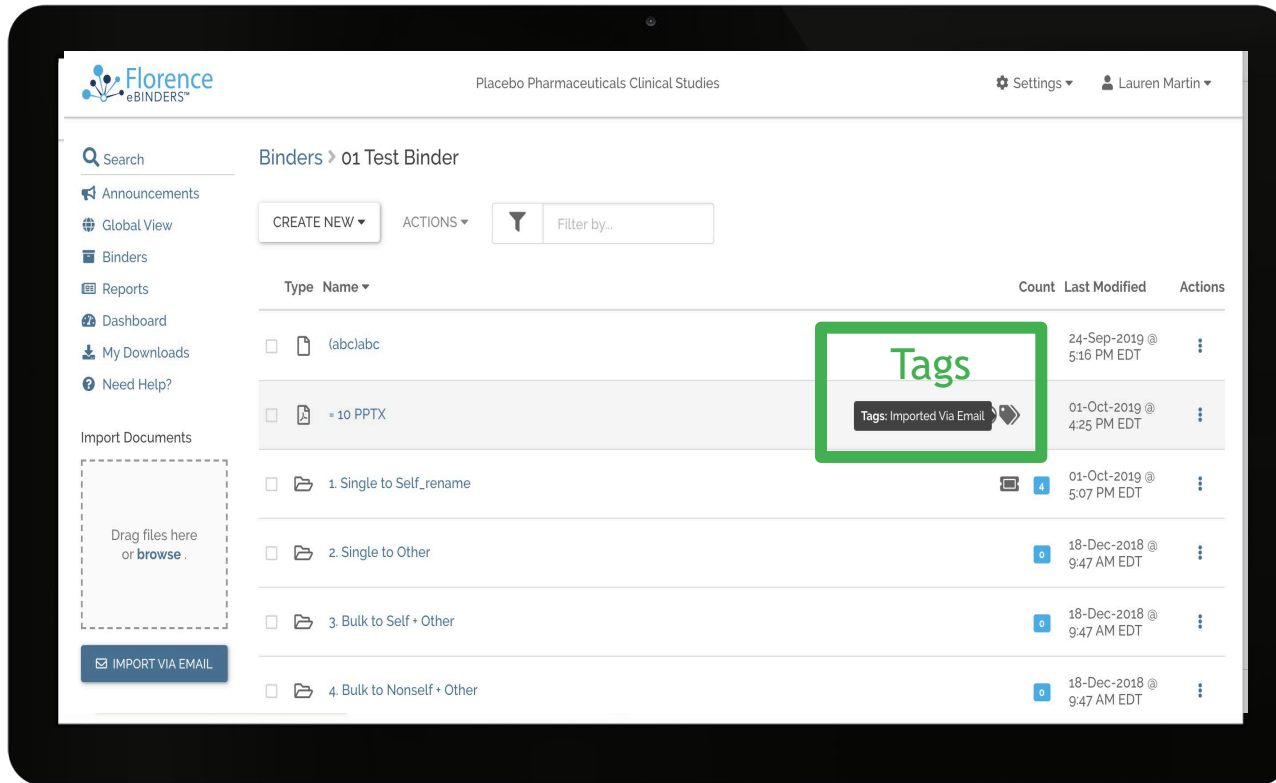
11 MAY 2019 - Communications Binder Training

Why?
Easily save and store communications in eBinders so that retrieval is streamlined and critical documents are not lost in paper or email folders of previous employees.

Tips:
Create appropriate Communications/Correspondence Binders.
Select the "Import via Email" option to find the location address.
Copy location.
Save as a contact.
Use to send critical documents and emails into the Binder.
Use as a BCC on communications with people who do not have permissions to upload documents in the eBinder location OR when you want to prevent reply all's from attempting to upload in eBinder.

Attached:
See the Florence Certification Training Guide.

Upload Documents: Email Connector Success

Confirm SUCCESS!!

- If successfully imported via email, you will receive an email confirming your documents were imported successfully
- Your document will be automatically tagged indicating that it has been imported via email

Upload Documents: Email Connector Unsuccessful

Florence@researchbinders.com

We Received your Email Import - 0 out of 0 document(s) were processed

We Received Your Email Import

We received your message but were unable to process it.

For assistance please contact us at support@florencehc.com.

Cheers,

Your Florence Team

Email Support Flo

If you receive an email that 0 documents were imported, your email import failed.

Why Failing?
- This could be occurring because either you are restricted by permissions to prevent unauthorized documents
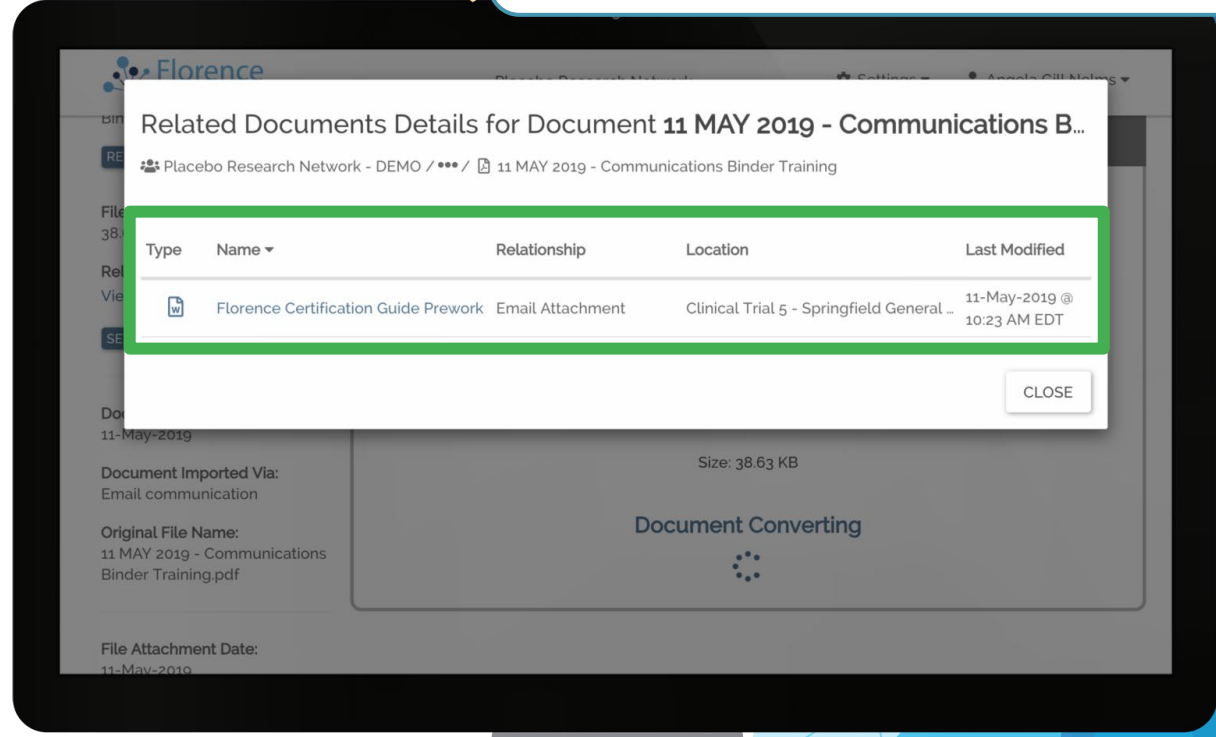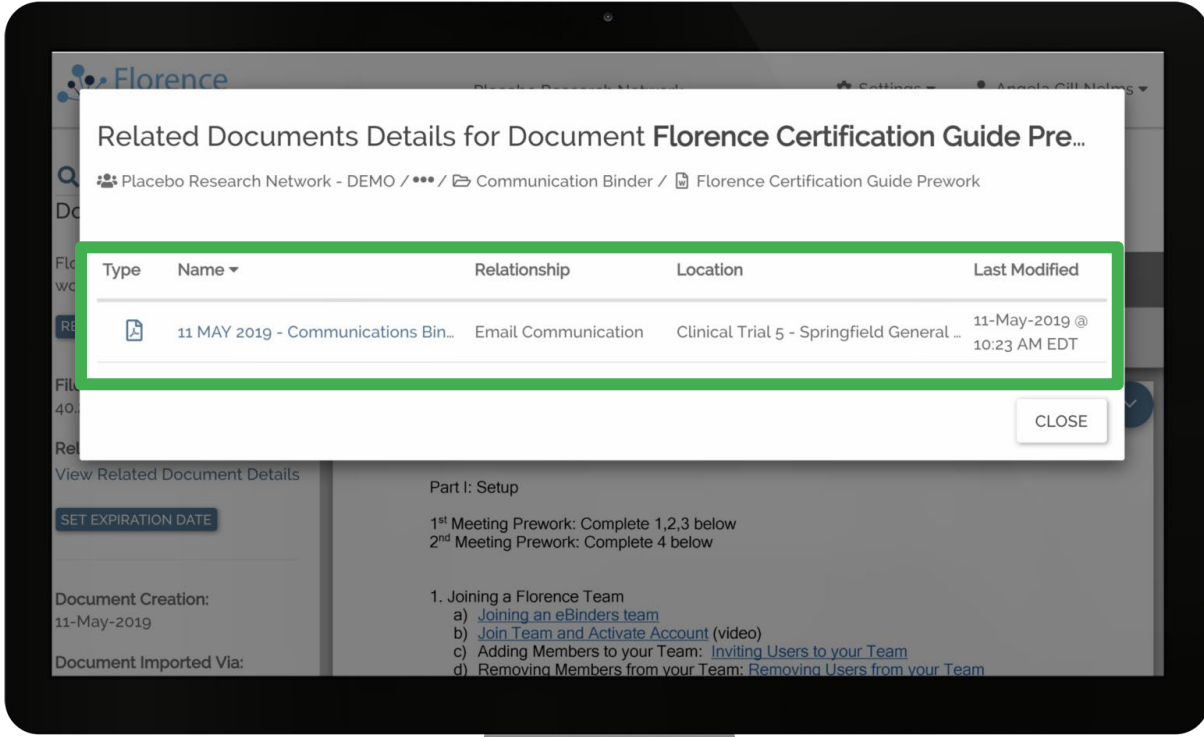- The email subject title contains invalid characters.

Need Help?
If neither item above applies, please reach out to troubleshoot at support@florencehc.com
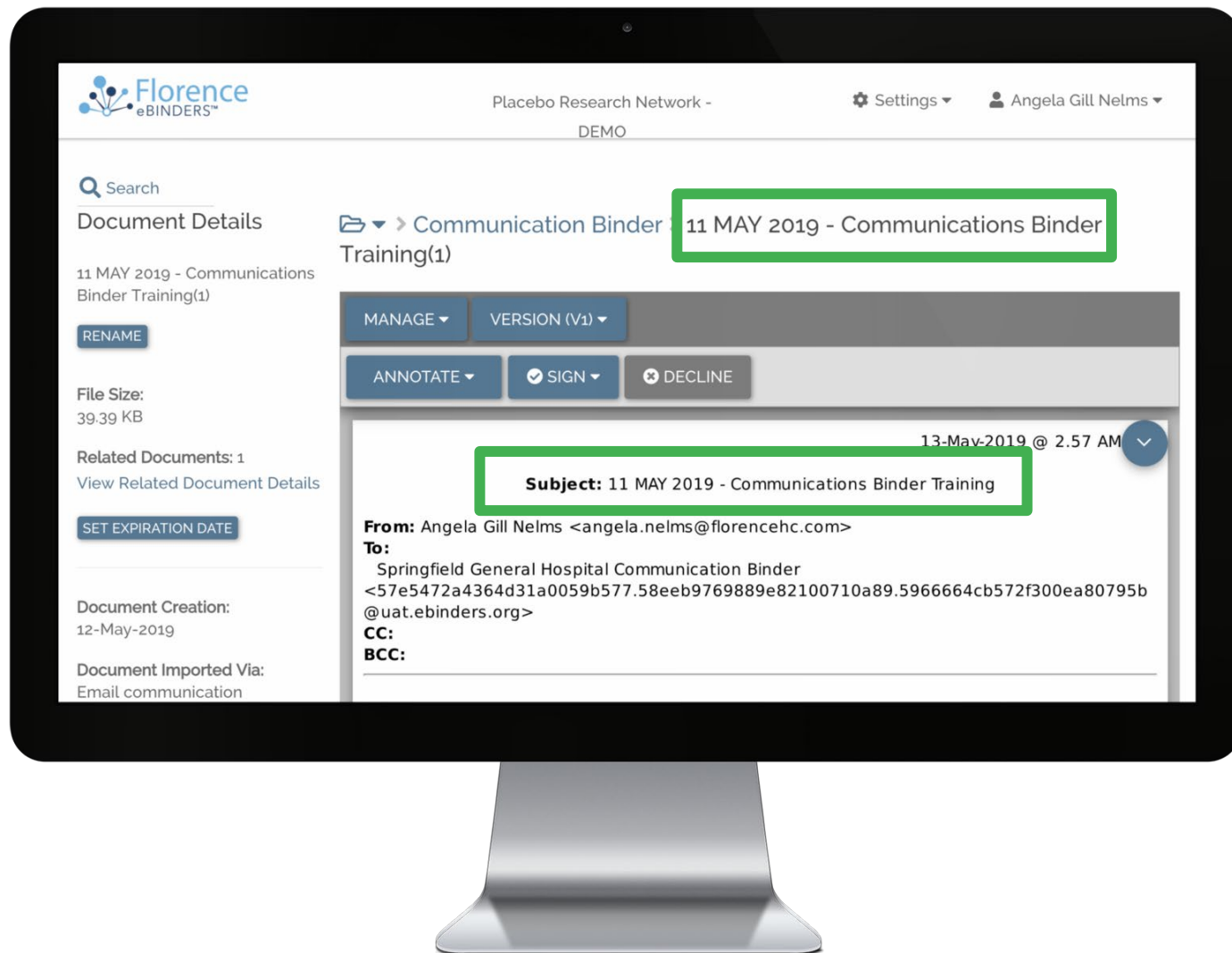
Upload Documents: Email Connector

QUICK TIPS

When you import a document via email with attachments, you will see the original email and attachments connected as Related Documents in Florence.

Florence

Upload Documents: Email Connector

Your email will upload as a .pdf Document. Keep in mind, the subject line of your email will become the name of your document once imported.

Upload Documents: Drag & Drop Placeholder

Why?
Ease of locating desired file and new location in Florence

How?
- Locate File on computer or Browser download bar
- Identify desired placeholder in Florence where you would like to place file
- Drag and drop file(s) into dotted box

Common Uses
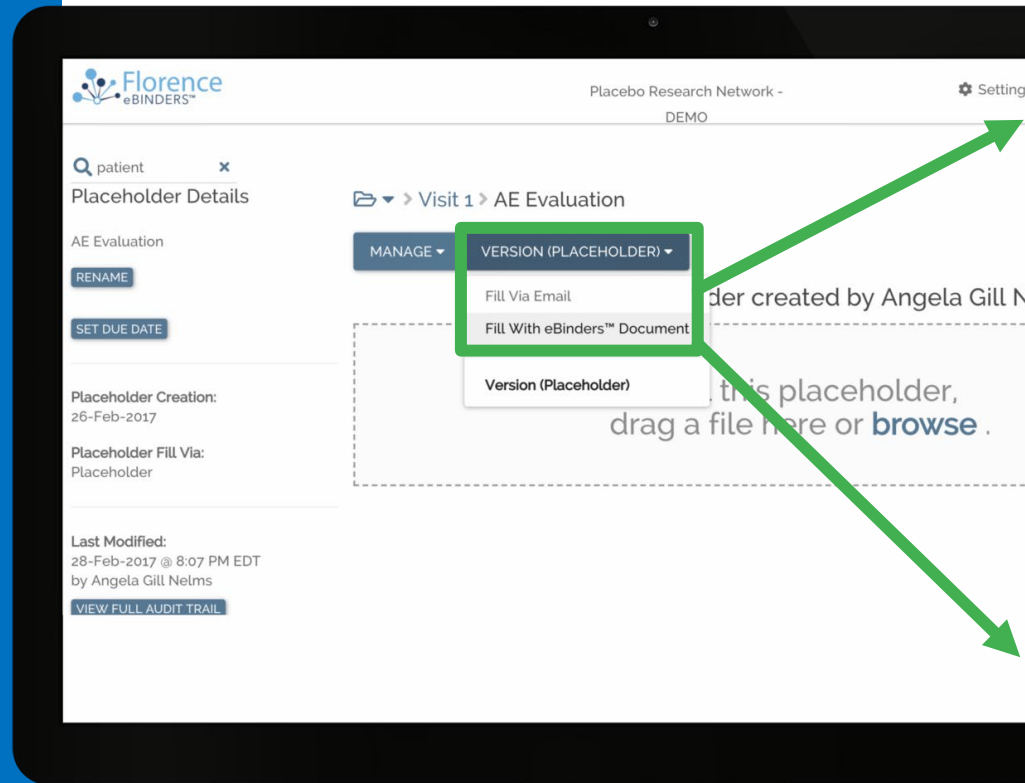Drag from emails, desktop, bulk folders, and browser download trays

Look for dotted box!

Upload Documents: Fill Placeholder

How?
- Open Placeholder
- Select Fill option:
  - Browse
  - Email
  - Existing eBinder Document via Move, Duplicate, or Shortcut
- Assign Document Name
- Select Fill Placeholder to complete

Common Uses
- Study startup
- Employee Onboarding
- Visibility into "missingness"

Florence eBINDERS™

Placebo Research Network - DEMO

Settings

patient

Placeholder Details

Visit 1 > AE Evaluation

AE Evaluation

MANAGE | VERSION (PLACEHOLDER)

RENAME

Fill Via Email

SET DUE DATE

Fill With eBinders™ Document

Version (Placeholder)

...der created by Angela Gill Ne...

Placeholder Creation:
26-Feb-2017

...this placeholder,
drag a file here or browse .

Placeholder Fill Via:
Placeholder

Last Modified:
28-Feb-2017 @ 8:07 PM EDT
by Angela Gill Nelms

VIEW FULL AUDIT TRAIL

Fill Placeholder **AE Evaluation** With a Document

Placebo Research Network - DEMO / ••• / Visit 1 / AE Evaluation

* Method
Select a method to fill Placeholder...

* Document

⊞ Awesomeness Clinical Research - Implementation, ePrinter, SSO, Custom Work, Doc Migration, and CTMS - DEMO

⊞ *Clinical Trial 5 - Placebo Cancer Center (Dashboard)*

⊞ Clinical Trial 5 - Springfield General Hospital

⊞ Clinical Trial 5 - St. Sebastian's Hospital

⊞ Miracle Cancer Drug Trial - All Sites

Document Name

◉ Placeholder: AE Evaluation

○ Document:

○ Custom: | New Document Name

CANCEL | FILL PLACEHOLDER

Import via Email

Emailing an attachment will replace a placeholder or document with the attachment. If there is no attachment, the email body will be created as the latest version of the document.

1) Copy and paste this email address into your email client:

57e5472a4364d31a0059b577.58b35f1149461e1a00358831.58b35f2

or

2) OPEN DEFAULT MAIL CLIENT

DONE

Confidential Florence HC