Announcements: Use Cases

Send communications to User(s) and/or Role(s) directly from Florence with related items

- **Amendments/IRB Approvals** – Share submissions and study materials to billing, legal, and other units

- **Enrollment Changes** – Quickly share ICFs with investigators to approach/consent new patients

- **New Studies** – Share Binders/Folders during study startup so everyone knows where to go for what

- **Organizational Updates** – Share lab ranges, CITI, CAP/CLIA, IRB rosters, etc. to all monitors at once

- **New Employees** – Share Folders/Placeholders to submit their credentialing documents for review

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Announcements: Page Layout

View Announcement:
- Click the title to open

Send Announcement:
- Requires having Team-level permission: "Send Announcement"

My Inbox:
- Lists all Announcements sent to you (the logged in User). No permission is required to <u>receive</u> an Announcement

Team Inbox:
- Lists all Announcements sent to the entire Team Requires Team-level permission: "View Announcement"

Announcements: How to Send

Click Send Announcement

Required Fields
- Title
- Message
- User(s) and/or Role(s)

Optional Field
- Related Items (binder, folder, document, shortcut, placeholder)

QUICK TIPS
- Search by User, Role, or email address
- Previous button – Maintains the Title, Message, Related Items, Users, and Roles
- Clicking "Add Details" at the top returns you to the previous step, too

Announcements: How to Receive

1. **Title of Announcement**

2. **Message of Announcement**

3. **Related Items (optional)** – if no items are related, this section will not be displayed in email

4. Clicking the "**View Announcement**" button navigates you to the Florence login page to enter credentials

Announcements: Viewing in Florence

1. Related Items:
- These are hyperlinks
- If renamed, changes show here
- If moved, redirects to new location
- If User doesn't have permission to view, they will be directed to our default page and cannot view

2. Sent To:
- Everyone who can view an announcement sees which Role(s) and/or User(s) received it

Announcements: Permissions Involved

To Send an Announcement:

- Download Documents with PII
- ☑ Manage Team and its Contents
    - Create Binders
    - Create Tags
    - Delete Tags
    - Download All Audit Trail Events for the Team
    - Invite Users to the Team
    - ☑ Manage Access and Permissions for the Team
        - Assign Roles (Off) for the Team
        - Manage Access Dates for the Team
        - Manage Roles and Permissions for the Team
        - Run Role Manager for the Team
        - ☑ **View Users, Roles and Permissions for the Team**
    - ⊞ Manage Binder
    - Manage Form Field Placeholders
    - ⊞ Manage Projects
    - Manage Tasks on a Team
    - Rename Team
    - ☑ **Send Announcement**
    - Remove Users from the Team
    - Update Tags
    - Update Team Profile
    - View Announcement
    - View All Audit Trail Events for the Team
    - View Team Profile
- View Documents With PII

Extra Permission(s) Needed

To save these permissions, the following permission(s) must also be granted to **Study 001 Alerts**:

• View Users, Roles and Permissions for the Team

Would you like to include the above permission(s)?

CANCEL INCLUDE AND SAVE

To View the Team Inbox:

- Download Documents with PII
- ☑ Manage Team and its Contents
    - Create Binders
    - Create Tags
    - Delete Tags
    - Download All Audit Trail Events for the Team
    - Invite Users to the Team
    - ⊞ Manage Access and Permissions for the Team
    - ⊞ Manage Binder
    - Manage Form Field Placeholders
    - ⊞ Manage Projects
    - Manage Tasks on a Team
    - Rename Team
    - Send Announcement
    - Remove Users from the Team
    - Update Tags
    - Update Team Profile
    - ☑ **View Announcement**
    - View All Audit Trail Events for the Team
    - View Team Profile
- View Documents With PII

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Announcements: Tips and Tricks

You can send an Announcement to a specific Role (group of users), or to an individual user.

▶ **Study 001 Team** – Include investigators, coordinators, budget/legal analysts, Sponsor contacts, and more!

▶ **Site 001 Monitors** – Include all monitors with access to your central (non-study specific) files to share updates like CAP/CLIA, Lab Normal Ranges, Laboratory Director CV, etc.

Examples of how you can use Announcements to communicate registration/ access requirements

▶ **Registration**: *"Welcome to eBinders! Once you register, this will be your Study Binder."*

▶ **Access Reminder**: *"Reminder: Your next IMV is scheduled next week. Your access will be turned on the first day of your visit.*

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