

## 16.1 Getting Started with OpenClinica

This section shows you how to log in, reset your password, change your user profile, change your current Study or Site, log out, and report issues.

Approved for publication by Ben Baumann. Signed on 2014-03-24 7:58AM

Not valid unless obtained from the OpenClinica document management system on the day of use.

### 16.1.1 Log In to OpenClinica

To access OpenClinica, in your web browser go to the OpenClinica login page. If you need the address for the page, see your Business Administrator.

Provide your authorized user name and password, then click Login.



The OpenClinica [home page](#) opens.

#### Reset Password

For security purposes, your system might be configured so that under certain conditions you must reset your password when you try to log in.

When the Reset password page displays, complete the fields in the page. Your password must be at least eight characters long. Then click Change Password.

**Reset password**

Welcome to OpenClinica, Chris Cole. Your current password has been set by the system or has expired. In order to continue, you MUST change your password below.

\* Indicates required field.

Old Password:  \*

New Password:  \*

Confirm New Password:  \*

Password Challenge Question:  \*

Password Challenge Answer:  \*

## 16.1.2 Get a New Password

If you want to change your password, do that in your [User Profile](#).

If you forgot your password, you can get a new one:

1. Click the Forgot Password link on the Login page.  
The Request Password Form page opens.
2. Complete the fields on the page.
3. Click Submit Password Request.

**Request Password Form**

You must have a valid OpenClinica user account to receive a password. Please fill out all the fields in the following form. OpenClinica will use the e-mail address associated with your account to send you the password. If you still have questions, please contact your OpenClinica Administrator for help.

All fields are required.

User Name :

Email:

Password Challenge Question:  ▼

Password Challenge Answer:

If you provided the correct information, you will receive an email containing a temporary password, or your Administrator will provide you with a temporary password. Use the temporary password to log in to OpenClinica. You will then be required to reset your temporary password (considered the "old" password) to a new password.

If the information you provided is incorrect, an error message displays. Correct the information and try again or see your Administrator.

## 16.1.3 Change Current Study or Site

When you use OpenClinica, you work within a specific Study or Study Site (also referred to as a Site and sometimes known as a center in the clinical trial community). In OpenClinica, a Study can have Sites. If a Study has Sites, you can work with the overall Study (working at the Study level), or you can work with just one Site (working at the Site level). Depending on your user Role, you might only

have access to your Site and not the Study level; in that event, OpenClinica automatically sets your Site and does not allow you to change it.

The name of the current Study or Site is above the navigation bar and in the Other Info sidebar panel. To view more information about the current Study or Site, click the Study or Site name. The Study Details page opens. For more information, see [About Study Details](#).

If you work with more than one Study or Site, be sure to set the current Study or Site before performing a task.

To change the current Study or Site:

1. Click the Change Study/Site link (above the navigation bar).
2. Select the Study or Site you want to work with.
  - Studies are in bold.
  - Sites are listed under a Study and are in a regular font.
3. Click Change Study.  
The Confirm Changing Study page opens.
4. Click Confirm.
5. The new Study or Site name is now in the navigator bar and sidebar.

If you selected a Study that is *frozen* (that is, the Study is no longer accepting data), a pop-up message alerts you. For more information, see [Status of Study](#).

To automatically select a Study as the current Study whenever you log in, specify the Default Current Study in your [User Profile](#).

The screenshot shows the OpenClinica Enterprise interface. At the top, the breadcrumb trail reads: "Docetaxel in Patients With ... : Cambridge Center for Surgic... (R01-123456-CCSO) | Change Study/Site". Below this is a navigation bar with links: Home | Subject Matrix | Notes & Discrepancies | Study Audit Log | Tasks. On the left sidebar, under "Other Info", the current study is listed as "Study: Docetaxel in Patients With Completely Resected NSCLC" and the site as "Site: Cambridge Center for Surgical Oncology". The main content area is titled "Change Your Current Study" with a help icon. It states: "Your current active study is Cambridge Center for Surgical Oncology, with a role of Data Manager. Please choose a study in the following list:". A list of studies is shown with radio buttons for selection. The first option, "Default Study (Study Director)", is selected. Other options include "Docetaxel in Patients With Completely Resected NSCLC (Data Manager)" (which is expanded to show sub-options like "Cambridge Center for Surgical Oncology (Data Manager)", "Center for Cancer Research at Cambridge (Data Manager)", "Somerville Cancer Research Consortium (Data Manager)", and "Somerville Medical Center (Data Manager)"). At the bottom are "Change Study" and "Cancel" buttons.

## 16.1.4 Update User Profile

To update your user profile:

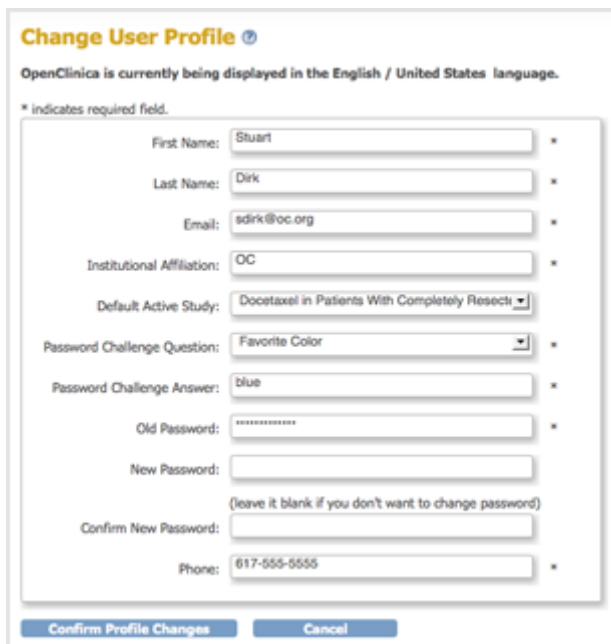
1. On the navigation bar, select Tasks > Update Profile.  
The Change User Profile page opens.
2. Update the values you want to change: your name, email address, default active study, password challenge question, password, phone number.

3. Click Confirm Profile Changes.

The Confirm User Profile Updates page opens.

4. If the information is correct, click Update Profile.

A message in the Alerts and Messages sidebar notifies you that your profile was updated successfully.



The screenshot shows the 'Change User Profile' form in OpenClinica. At the top, it says 'OpenClinica is currently being displayed in the English / United States language.' Below this is a note: '\* indicates required field.' The form contains several input fields, each with an asterisk indicating it is required:

- First Name: Stuart
- Last Name: Dirk
- Email: sdirk@oc.org
- Institutional Affiliation: OC
- Default Active Study: Docetaxel in Patients With Completely Resect
- Password Challenge Question: Favorite Color
- Password Challenge Answer: blue
- Old Password: (masked with asterisks)
- New Password: (empty)
- Confirm New Password: (empty, with a note: '(leave it blank if you don't want to change password)')
- Phone: 617-555-5555

At the bottom of the form are two buttons: 'Confirm Profile Changes' and 'Cancel'.

## 16.1.5 Log Out of OpenClinica

To log out from OpenClinica, click Log Out (above the navigation bar, on the right). To use OpenClinica again, log back in.

For your security, we recommend logging out and completely closing your browser after each session, especially if accessing OpenClinica on a shared computer.

## 16.1.6 Get Support

### Support

For technical information, access to user forums, and issue reporting and tracking, click Support (in the navigation bar). The [openclinica.com/support](https://openclinica.com/support) page opens, where you can access the support information.

### Report Issue

If you believe you have encountered a problem in the system, report it to OpenClinica. Click Report Issue (in the navigation bar). The Submit Issue page opens. Complete the form, following the instructions on the page. Please be as descriptive and accurate as possible.

## Submit Issue

Use this form to submit any defects, usability, or performance issues you may have discovered in OpenClinica. You will be able to track the status of the issue you submit in the [OpenClinica Issue Tracker](#). You may also use this form to submit ideas and suggestions for new features and improvements to the software.

\* indicates required field.

URL :

Subject \* :

Description \* :

Severity :

Priority :

[Continue](#)

[Exit Bug Tracker](#)