# Getting started with Zamplo Research

A step-by-step guide

# Zamplo Research

# Setting up your Zamplo Research Account

## The first step to getting started is logging in to Zamplo Research

1. Open your email inbox

2. Find an email from "**no-reply@zamplo.org**" with a temporary password; check your spam folder in case you don't see it

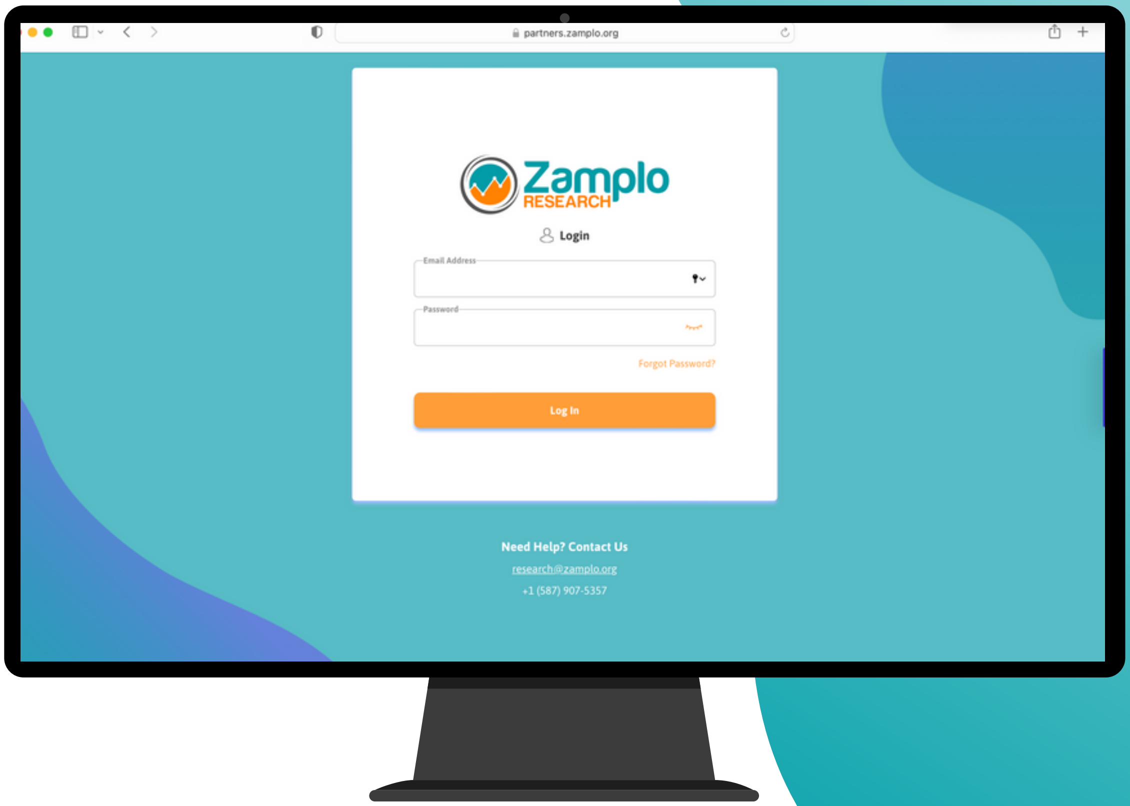
3. Use your email and the temporary password to log in at **https://partners.zamplo.org/login**

4. You will be prompted to create a new password at first login

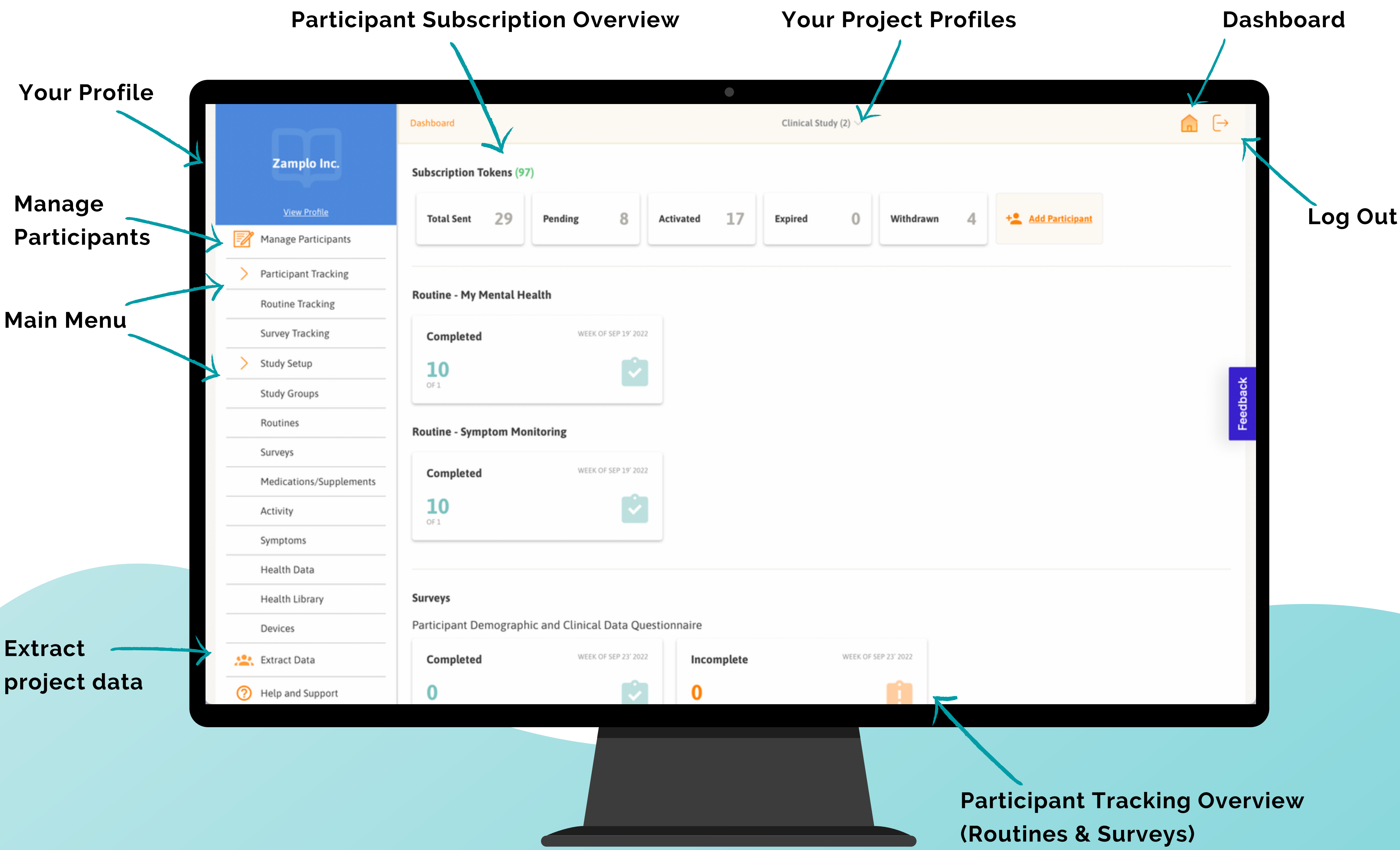
5. A 2 step-verification code will be sent to your email inbox

6. Enter that verification code to verify your account

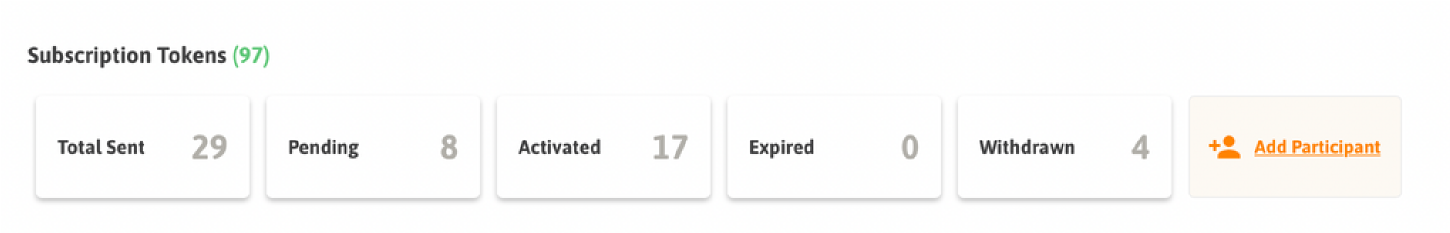
Once you have logged in, created a new password, and verified your account, you will be taken to the **dashboard**.



# Get to know the Dashboard



# Dashboard Key Words




**Subscription Tokens:** the number of subscriptions purchased

**Total Sent:** the number of participant subscriptions sent

**Pending**: the number of participant subscriptions that are pending

**Activated**: the number of participant subscriptions that have been activated

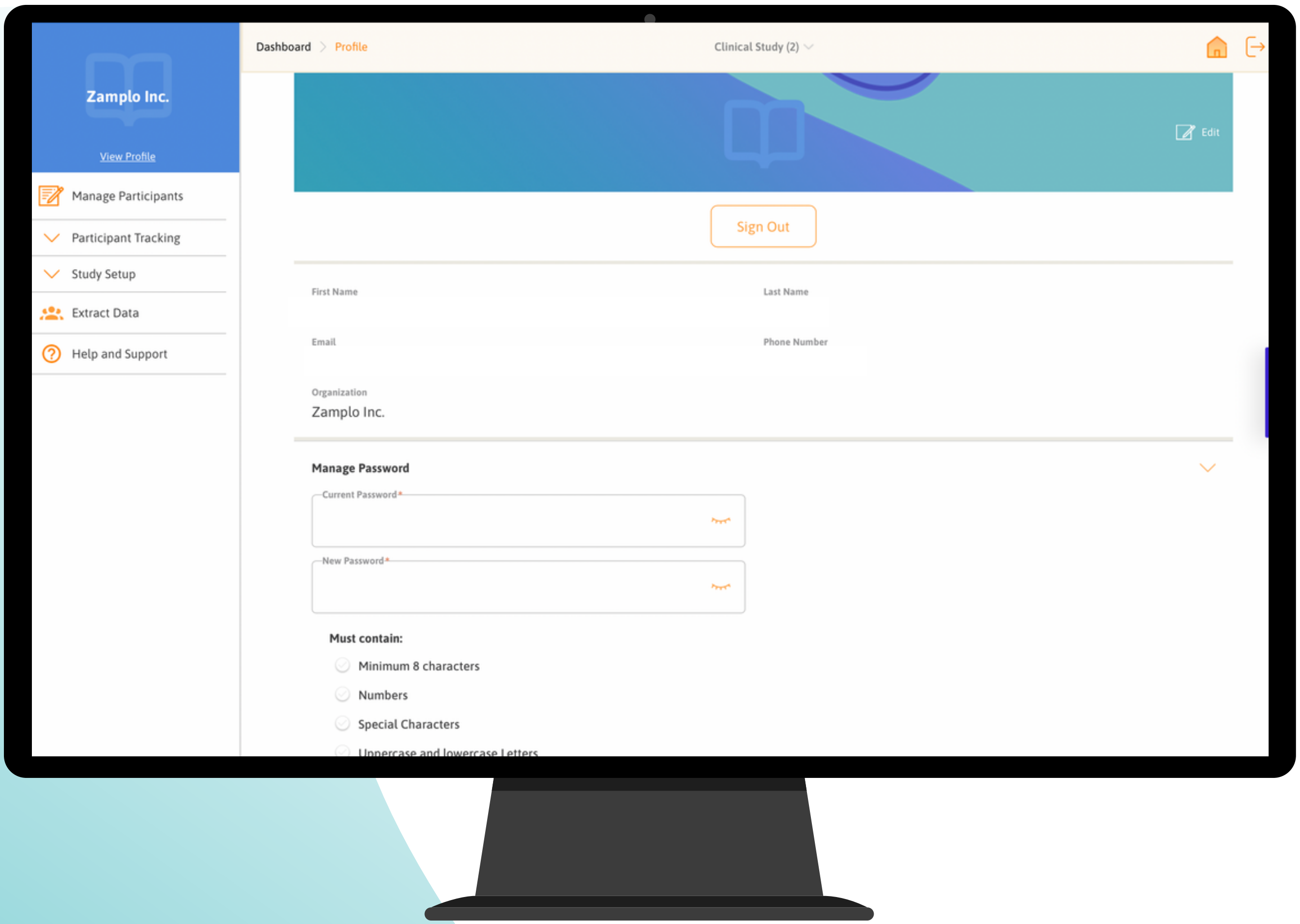
**Expired**: the number of participant subscriptions that have expired

**Withdrawn**: the number of participant subscriptions that have been withdrawn

**Add Participant:** add a new participant to the study

# Profile

With your profile, you can view your name, email, phone number, and organization that is linked to your Zamplo Research account. You can also edit your name, email address, and manage your password.




## How to edit your profile:

1. Click on **View Profile** at the top left of the dashboard screen
2. Click on **Edit** on the right side of your profile picture*
3. Edit your picture, name and email as needed
4. When you are done editing, press **Save**

*Note that your profile picture will be displayed to participants

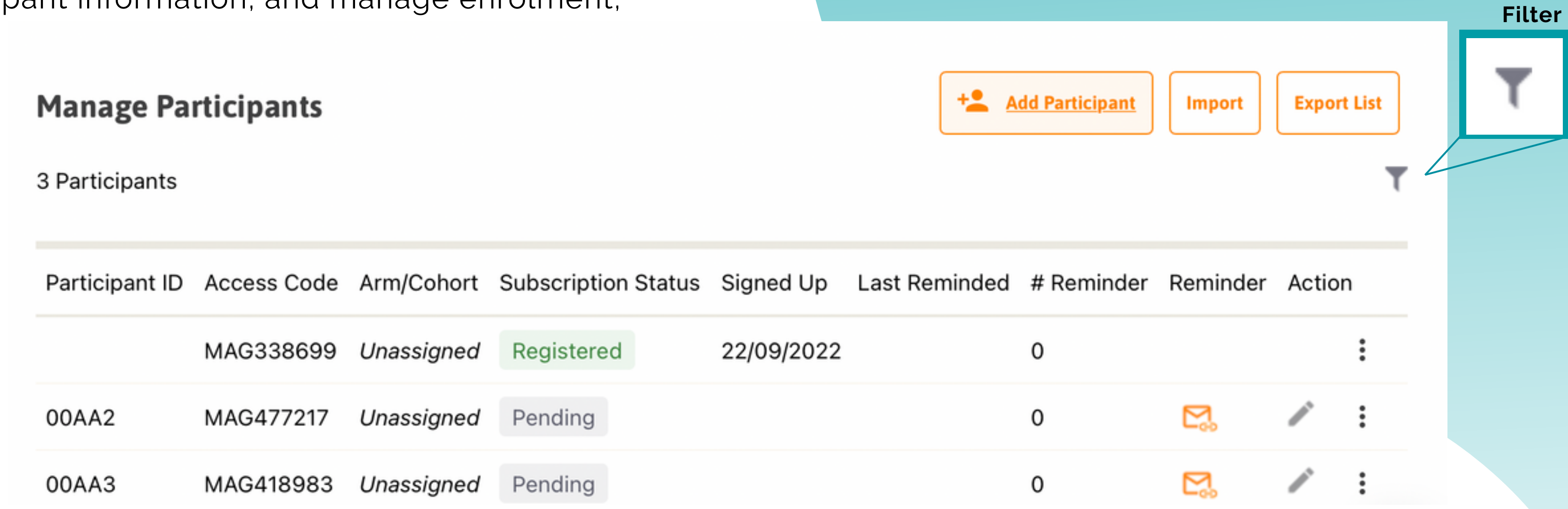
## How to manage your password:

1. Click on **View Profile** at the top left of the dashboard screen
2. Click on **Manage Password** at the bottom of the page
3. Type in your current password and your new password*
4. Confirm your password
5. Click on **Change Password**

*Note that your password should be a minimum of 8 characters, and include numbers, special characters, upper case and lower case letters

# Manage Subscriptions

**Manage subscriptions** is where you can invite participants, view participant information, and manage enrolment,




## View participant information:

- Name and Email
- Participant ID
- Access Code
- Status (Registered, Pending, Not Contacted, Withdrawn, Expired)
- Sign up Date
- Last Reminder and # of Reminders

## How to filter

You can filter participants by clicking on the filter icon and through a keyword search, by **"Subscription Status"**, or by **"Study Group."**

## How to withdraw participants

1. **Option 1**
    a. Click on the **three dots** to the right of the screen
    b. Click on **Withdraw**
2. **Option 2**
    a. **Checkmark** a participant
    b. Click the **"minus"** button at the top of the screen

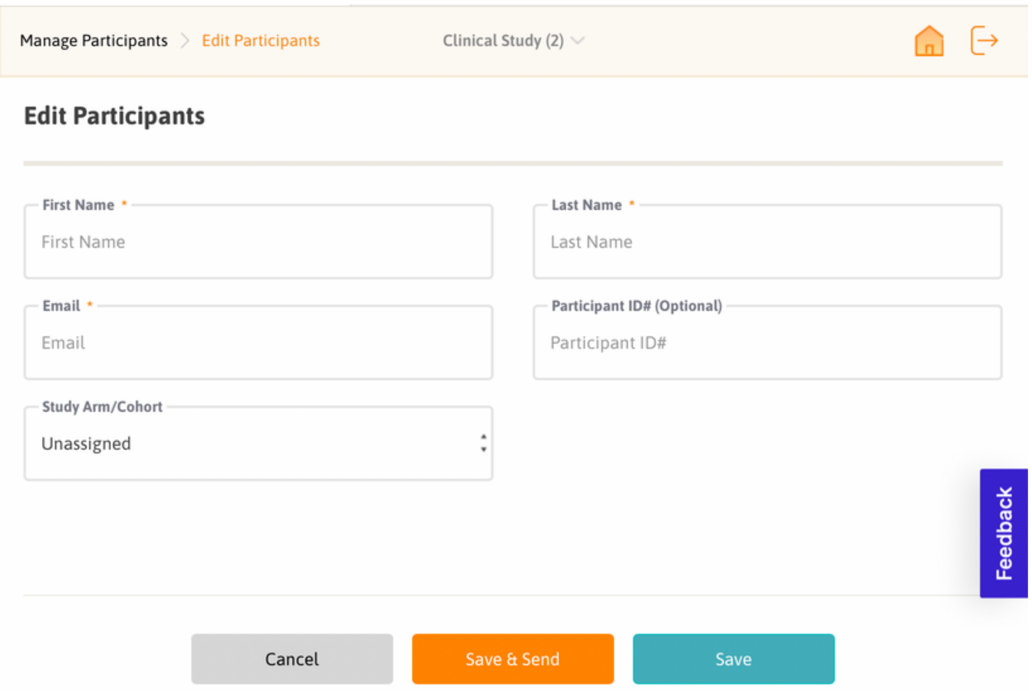
## How to Export Participants

1. Click on **Export List**
2. Give your report a name
3. Click **Export (csv)**

## How to send invitation reminders

1. Select the participant you would like to remind
2. Click on the orange email icon

# Manage Subscriptions - Adding and Inviting Participants




## How to add participants:

1. **Manually**
    a. Click on **+Add Participants**
    b. Enter the participant's information
2. **Bulk Upload**
    a. Click on **Import** on the Manage Subscriptions screen
    b. Click on **"Download a Sample File"**
    c. Enter all of your information and save the .csv file
    d. Upload the file to Zamplo Research

## How to invite participants:

1. **Inviting right away**
    a. You can use the option **Send & Save** when adding a participant
2. **Inviting at a later time**
    a. If you have entered a participant's information, but are not ready to invite them, click **Save**
    b. When you are ready to invite a participant, select the **three dots** to the right of the main screen
    c. Click on **Send**

**Note:**

- **Save** will only save the participant's information
- **Save & Send** will save the participant's information and, at the same time, send an invite

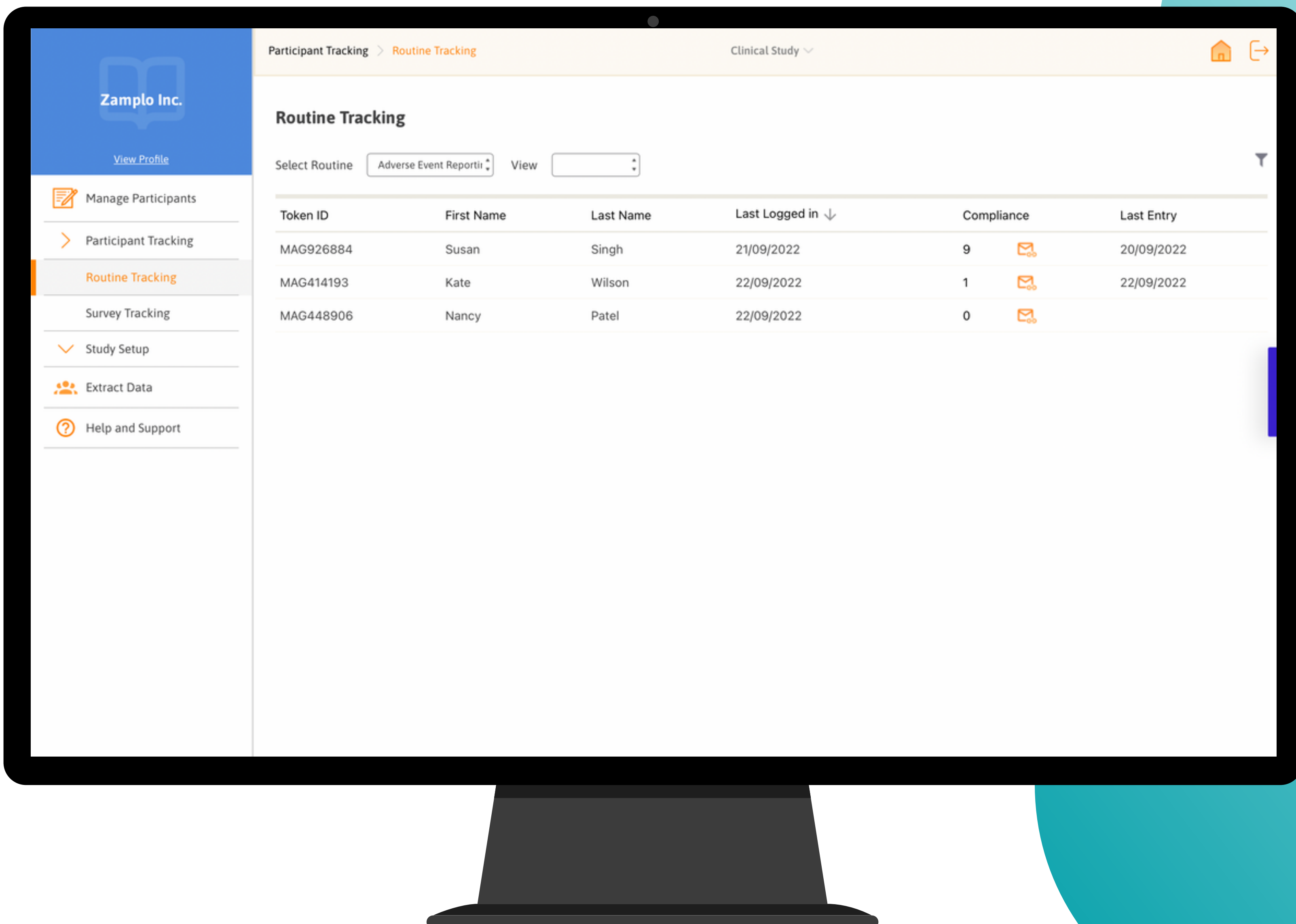
## How does the access code work?

New participants will be sent an invitation email that includes an access code. This access code links participants to **Zamplo Research** and connects them to their data.

## Participant Tracking

**Participant Tracking** allows for monitoring patient activity with regards to the **Surveys** and **Routines** (journal templates) that registered patients are expected to complete.

Compliance count provides an observed/expected score for participant completion.



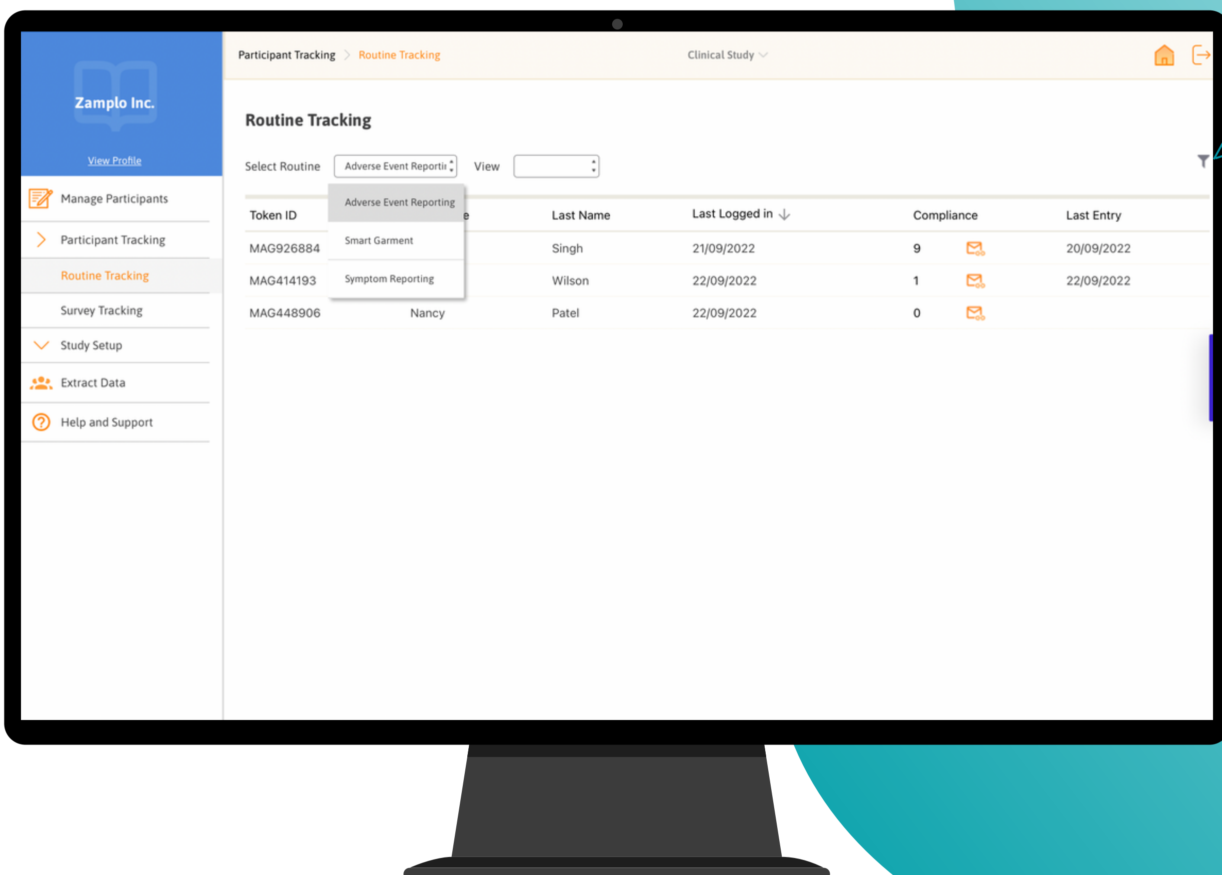
# Participant Tracking - Routine Tracking

**Participant Routine Tracking** allows for monitoring patient **Routines** activity that registered patients are expected to complete and their level of compliance.

## How to track participant Routines:

1. Click on **Participant Tracking**
2. Click on **Routine Tracking**
3. Select the **Routine** and **View** to be tracked
4. Participant Token ID, First and Last Name, Last Logged In Date, Compliance, and Last Entry will be displayed
5. Send participants a **Reminder** to complete a "**Routine"** by clicking the **orange email button** under "**Compliance"** to send them an email notification

**Note:**
Clicking on the "**column headers"** will sort items by ascending or descending order.



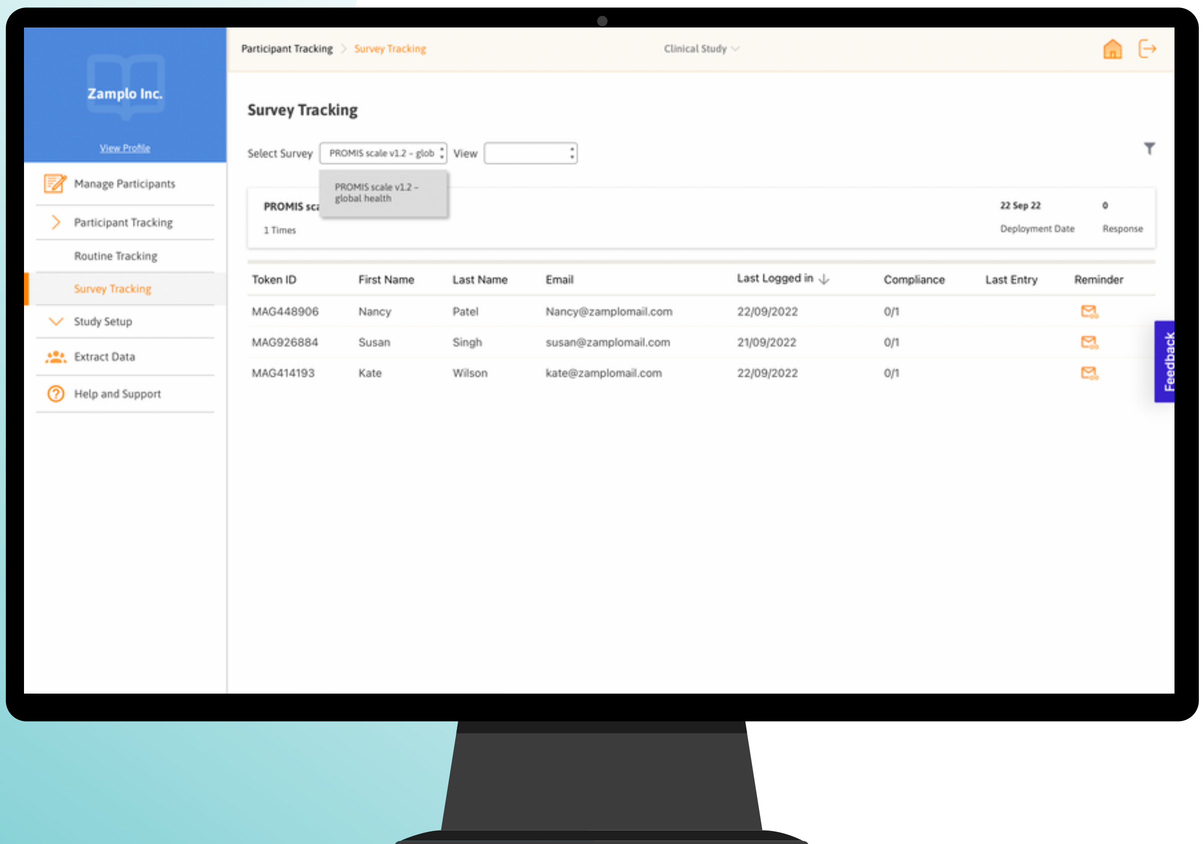

Filter

# Participant Tracking - Survey Tracking

**Participant Survey Tracking** allows for monitoring patient **Survey** activity that registered patients are expected to complete and their level of compliance.

### How to track participants Surveys:

1. Click on **Participant Tracking**
2. Click on **Survey Tracking**
3. Select the **Survey** and **View** to be tracked
4. The specified survey will be displayed with the number of completion Times, Deployment Date, and number of Responses
5. Participant Token ID, First and Last Name, Email, Last Login Date, Compliance, Last Entry and Reminder will be displayed below the survey
6. Send participants a **Reminder** to complete a "**Survey"** by clicking the **orange email button** under "**Reminder"** to send them an email notification



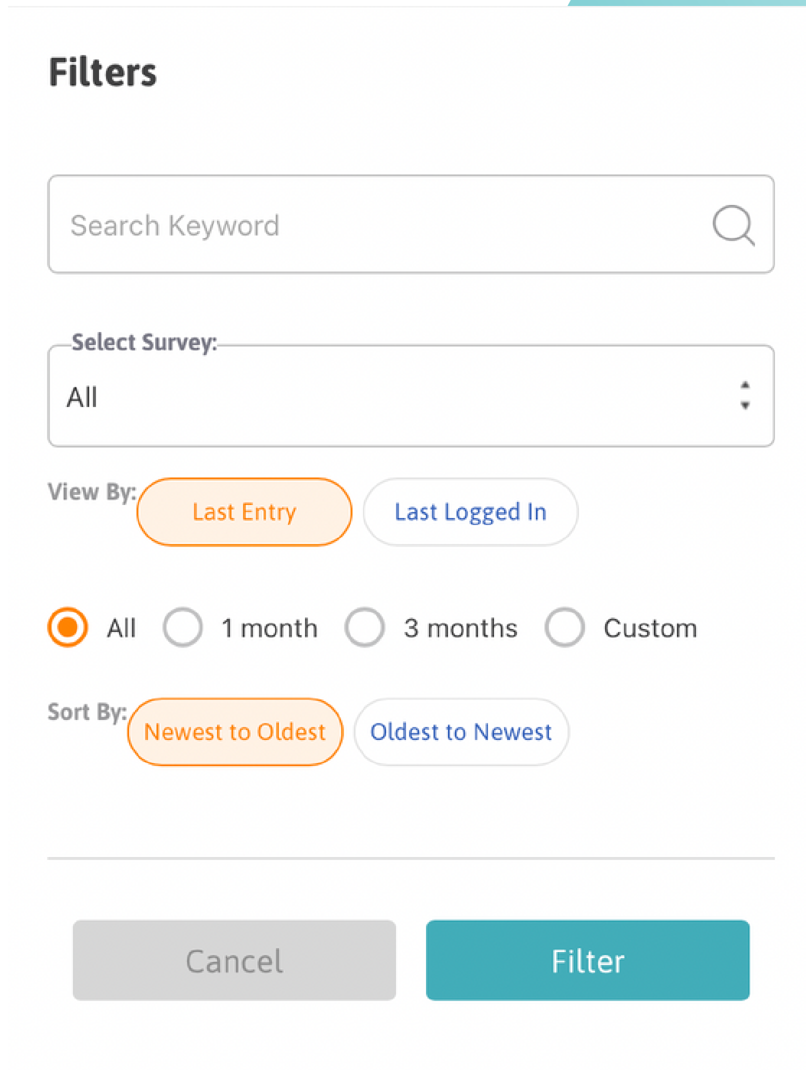

**Note:**
Clicking on the "**column headers"** will sort items by ascending or descending order.

# Participant Tracking - Filtering

**Participant Tracking** views can be filtered to support customized searches, allowing for more efficient analysis of participant data.

### How to filter Participant Tracking views:

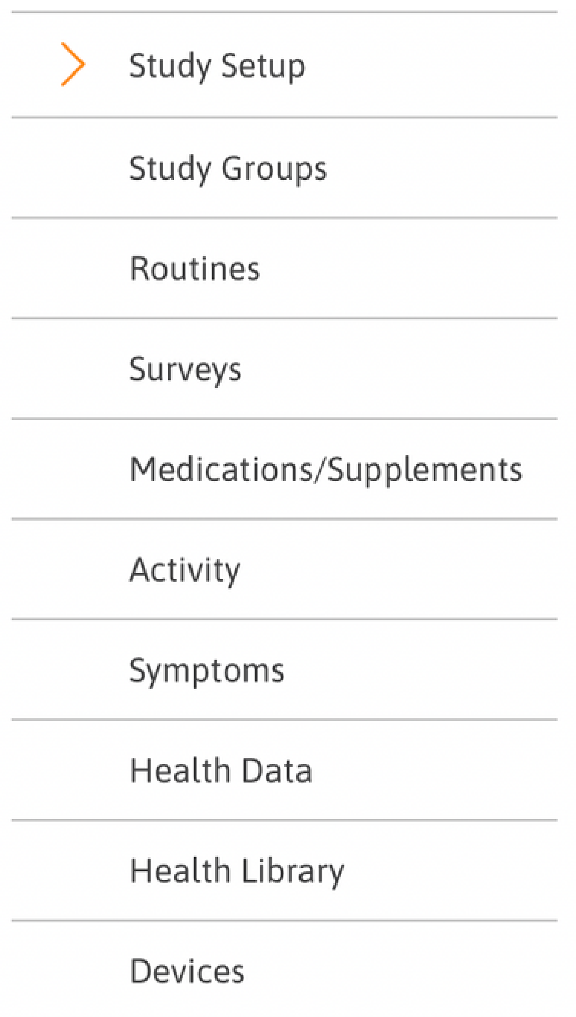
1. Click on the **Filter Icon** in the top right
2. Type in specific keywords to specify searches
3. Click on the dropdown menu **Select Routine** or **Select Survey** to select a specific routine or survey to filter
4. Select a view by clicking on **Last Entry** or **Last Logged In**
    a. Select a time filter from **All**, **1 month**, **3 months**, or **Custom**
    b. Select to filter from **Newest to Oldest** or **Oldest to Newest**
5. Click on **Filter**



# Study Setup

**Study Setup** is the core **Survey** and **Routine** builder.

Here, the researcher or organization admin designs templates for patients to track their data, either in the form of **Routines** (journal entry templates) or **Surveys.**




## What Is the Difference Between Routines and Surveys?

**Routines** use journal entry templates to track any data from participants such as what medications they take to what symptoms they are experiencing. Because the data entered is by each individual, **Routines** can help to gain more personal data or insight outside of standardized questionnaires.

**Surveys** can be created for **Forms** and **Questionnaires. Surveys** are sent out as a standardized set of questions for each individual to answer. Responses from **Surveys** help researchers or health care providers obtain information and identify quantitative research strategies to gain insight into suitable recommendations.

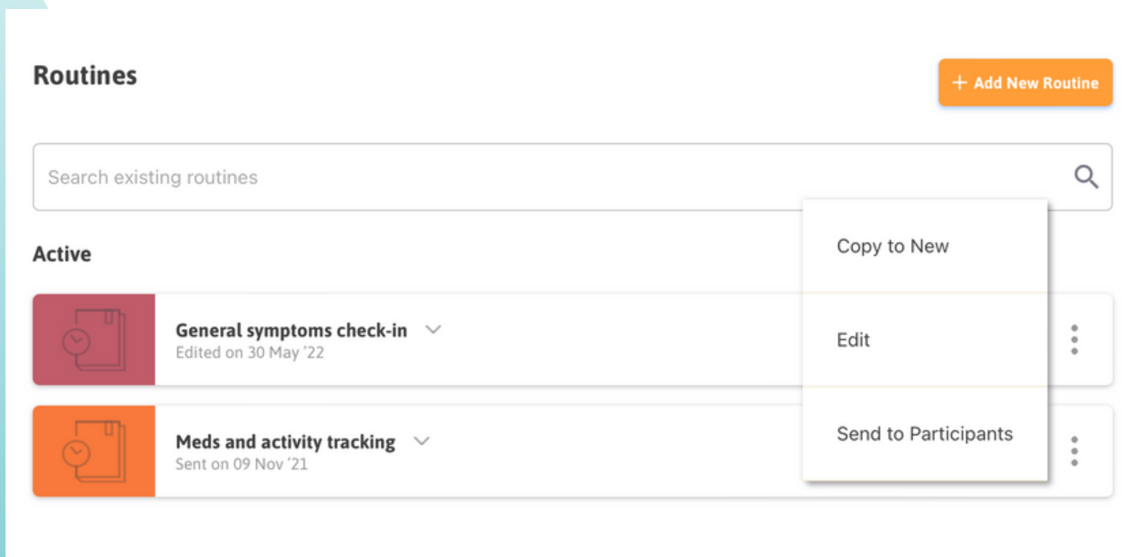
## Routines

**Routines** can be created for anything. **Routines** can help you gain insight outside of standardized questionnaires. It is also a tool that allows you to easily schedule reminders for the daily, weekly, or monthly Routines.

### When adding a new Routine, there are five categories to choose from:

- Medications and Supplements
- Activity
- Symptoms
- Health Data
- Reminder

This feature allows admins to add more granular information about specific elements inside the **Routines.**




### How to edit Active Routines:

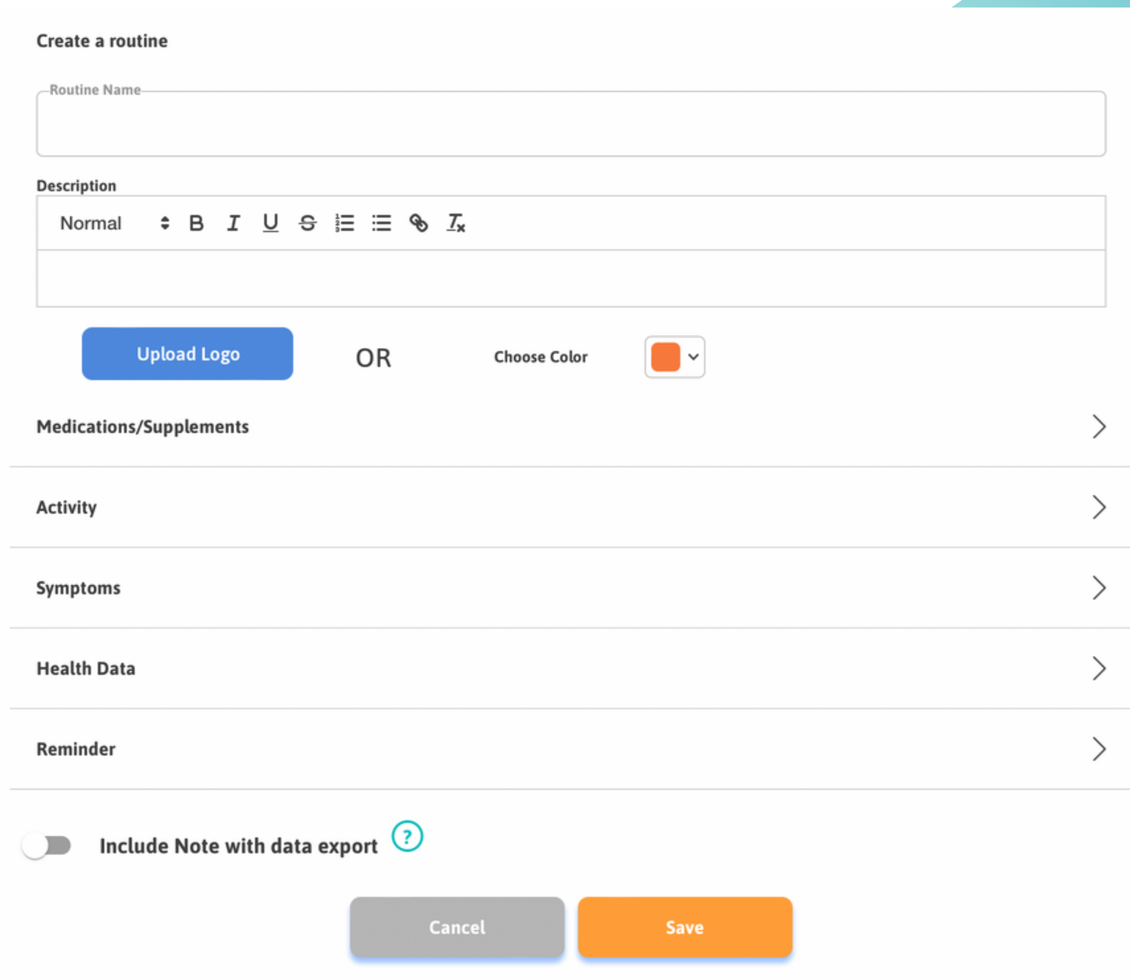
Select the **three dots** to **Copy to New, Edit,** or **Send to Participants**

- **Copy to New:** Create a new copy of the same **Routine**
- **Edit:** Change or add to any **Routines**
- **Send to Participants:** Push the **Routine** to the participants Zamplo account

# Routines: Create a new Routine

## How to create a new Routine:

1. Click the **Study Setup** drop-down menu and select **Routines**
2. Click on **Add New Routine** button
3. Create a **Routine Name** and add a **Description**
4. Click on **Upload Logo** to add a customized image or choose a colour to associate your routines with
5. Enter the **Routines** to track, this can include **Medicines/Supplements, Activities, Symptoms,** or **Health Data**
6. Once **Routines** have been added, set a **Reminder** to **Daily, Weekly,** or **Monthly**
7. Click on **Save**




**Note:**
In the **Description,** you can add links to Youtube Videos, PDFs, lists, or any attachments needed

**Include Note with data export:** Turn on **Include Note with data export** to gain data insight from participants via notes or written sections. Participants must accept the terms and conditions of the data to be obtained

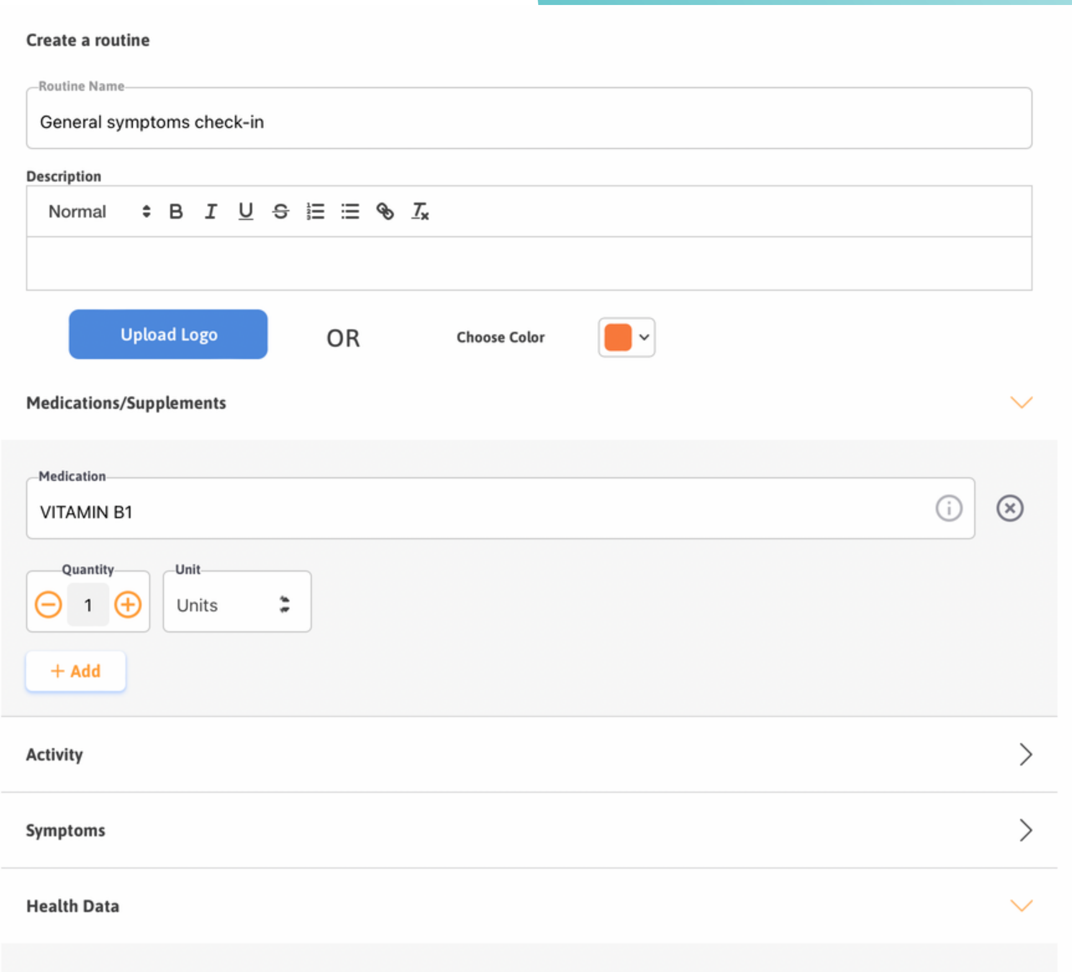
# Routines: Medications/Supplements, Activity and Symptoms

## How to add a Medication or Supplement to a Routine:

1. Click on **Medications/Supplements** dropdown menu
2. Enter the medication or supplement, or select from "**My List"**
3. Enter the quantity and unit of the **Medication** or **Supplement**

## How to add an Activity to a Routine:

1. Click the **Activity** dropdown menu
2. Enter the activity you will be completing, select from "**My List"** or **Create Custom**
3. Click the measure dropdown menu and select either hours, minutes, repetitions, or sessions
4. Depending on the measurement selected then choose the subsequent value needed for the activity




## How to add a Symptom to a Routine:

1. Click the **Symptom** dropdown menu
2. Enter the **Symptom** you have been experiencing
3. Navigate to the measure section and select either Yes/No or 0-10

# Surveys - Navigate Surveys

**Surveys** can be created for **Forms** and **Questionnaires. Survey Responses** can help obtain information and identify quantitative research strategies to gain insight into suitable recommendations. It is also a tool that allows you to easily conduct different survey questions and build them all in one location.

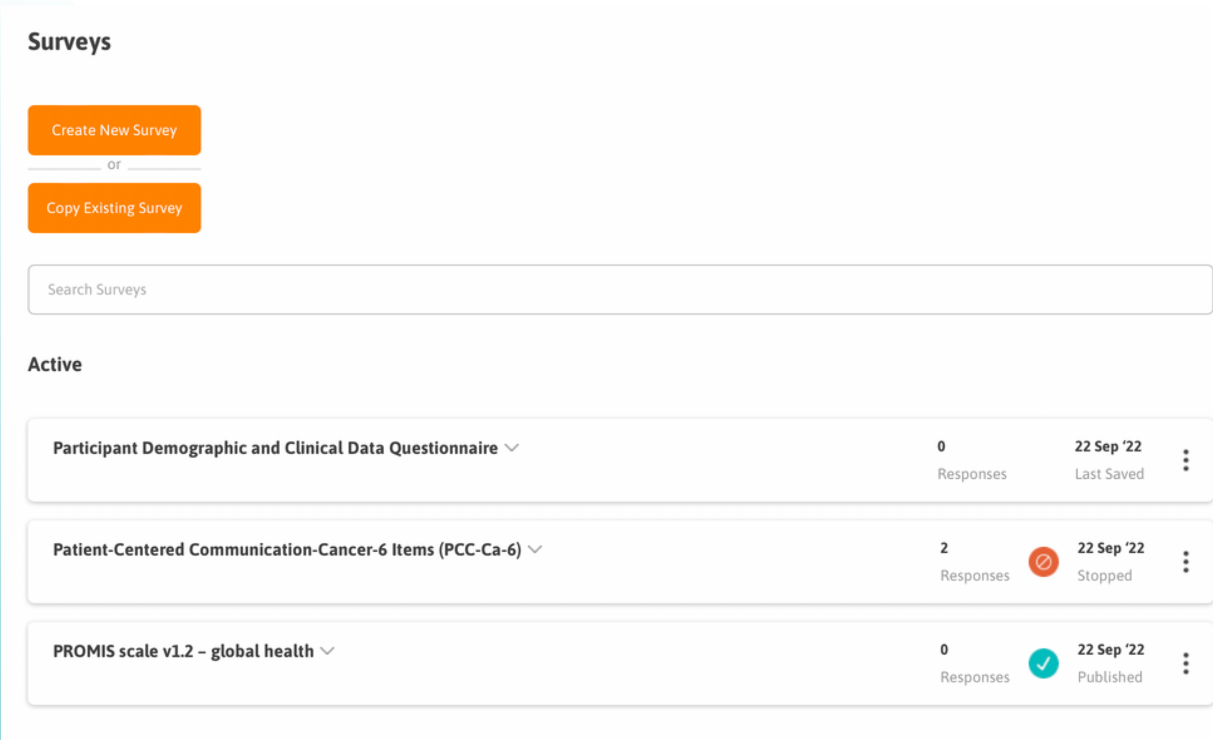
**Navigate to Surveys:**

**Surveys:** You can create a new **Survey** or edit an existing **Survey** that is not yet published

**Reminder:** Once a **Survey** is published - it cannot be edited, but you can create a copy of an existing published survey, edit the copy and publish it.

**Active Surveys - "green checkmark"** surveys are still available to the participant

**Inactive Surveys - "red circle"** means the surveys are no longer available to the participants



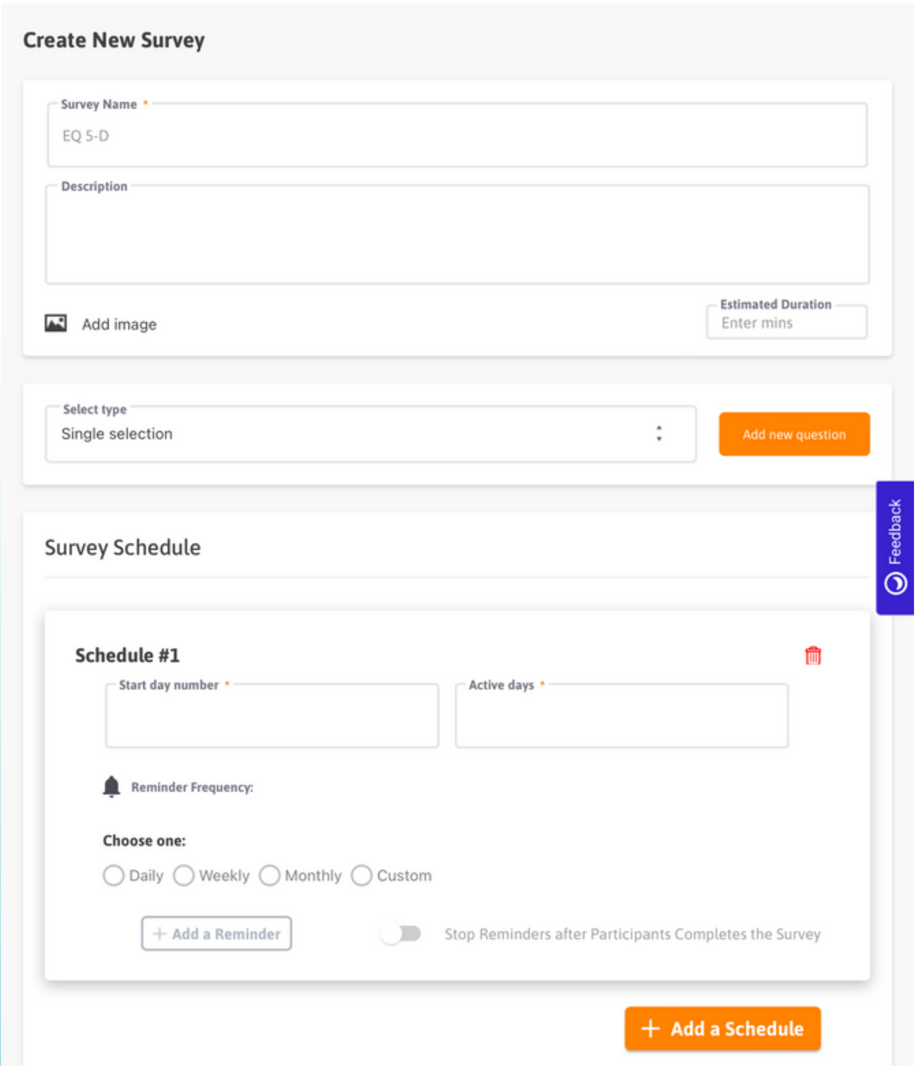

**How to edit Active Surveys:**
Select the **three dots** to **Delete** or **Duplicate** a **Survey**

- **Delete Survey:** Remove an existing **Survey**
- **Duplicate Survey:** Make another copy of the same **Survey**

**Click on a Survey** to see a summary of the questions, the number of responses and the schedule.

# Surveys - Create a New Survey

Click on **Create New Survey** (or edit unpublished) to open the **Survey** builder
Here you can create a **Survey** using different types of questions and also make it interactive




## How to Create a new Survey:

1. Click the **Study Setup** drop-down menu and click on **Surveys**
2. Click on **Create New Survey** button to open the **Survey** builder
3. Create a **Survey Name** and add a **Description**
4. You have an option to **Add Image** and enter an **Estimated Duration** time
5. Choose from the **Select type** list and click the **Add new question** button
6. Once you have added your questions, **Schedule** your **Surveys** and set a **Reminder Frequency**
7. Select the option to **Notify by push-notification** or **Notify by email**
8. If you want to make a **Survey** for a specific **Study Cohort** click **Study Group**
9. Select the **Study Arm/Cohort** and set the **Schedule**
10. Click on **Save**

# Surveys - Build a Survey

**Set Schedule for Surveys:** You will need to set up a schedule for notifications (at least 1) before you can publish the survey. The survey gets published only at the time of the notification (not before)

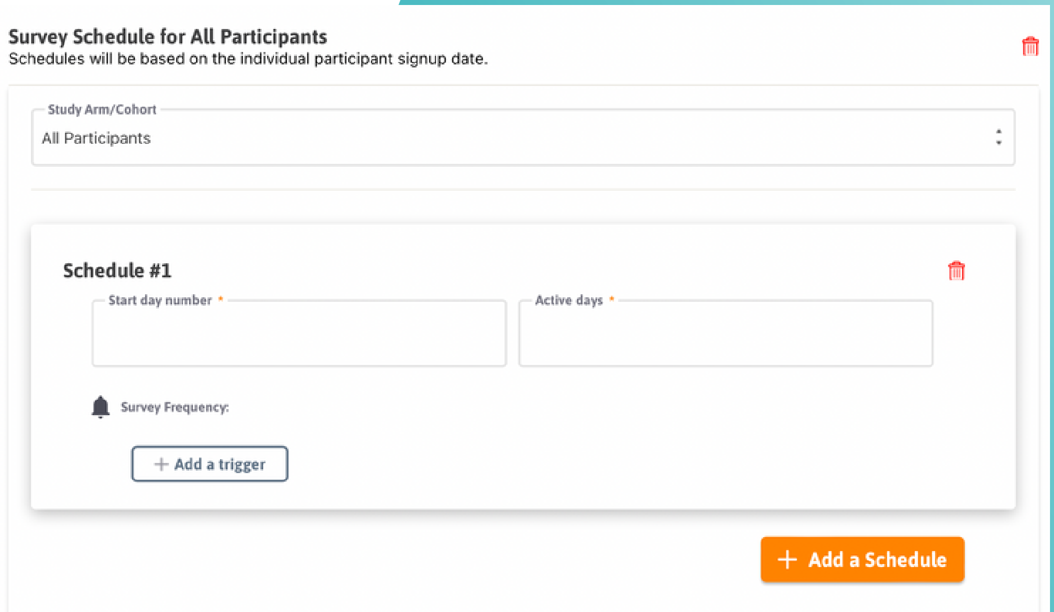
## How to build a Survey schedule:

1. Set the **Start day number** to 1 to ensure the survey is active right away
2. Set the **Active days** for the number of days you would like this survey to be active throughout the study
    a. We recommend setting a large number (like 3650 days)
3. Set up the reminder schedule for days, weeks, and months so the participants are nudged to fill out the survey
    a. Choose one **Reminder Frequency**: Daily, Weekly, Monthly, or Custom (select a time and day/week)
4. Click on **Add a Schedule** button to build another **Survey Schedule**
5. Publish the survey when you would like it to be seen by participants
6. End the survey when it should no longer be visible

## How Survey scheduling works

**Start day number:** The start day number is the offset from the day the survey is published to when the survey will start. E.g. if you publish the survey on June 1 and have an offset of 15 days, then the survey will be available on June 15.

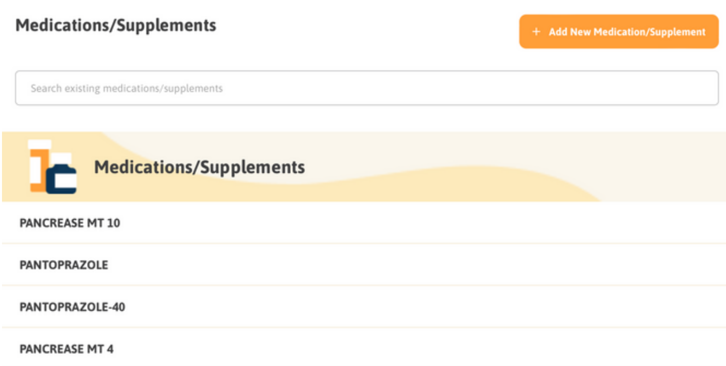
**Active days:** The active days are the number of days it is active once the survey is published.

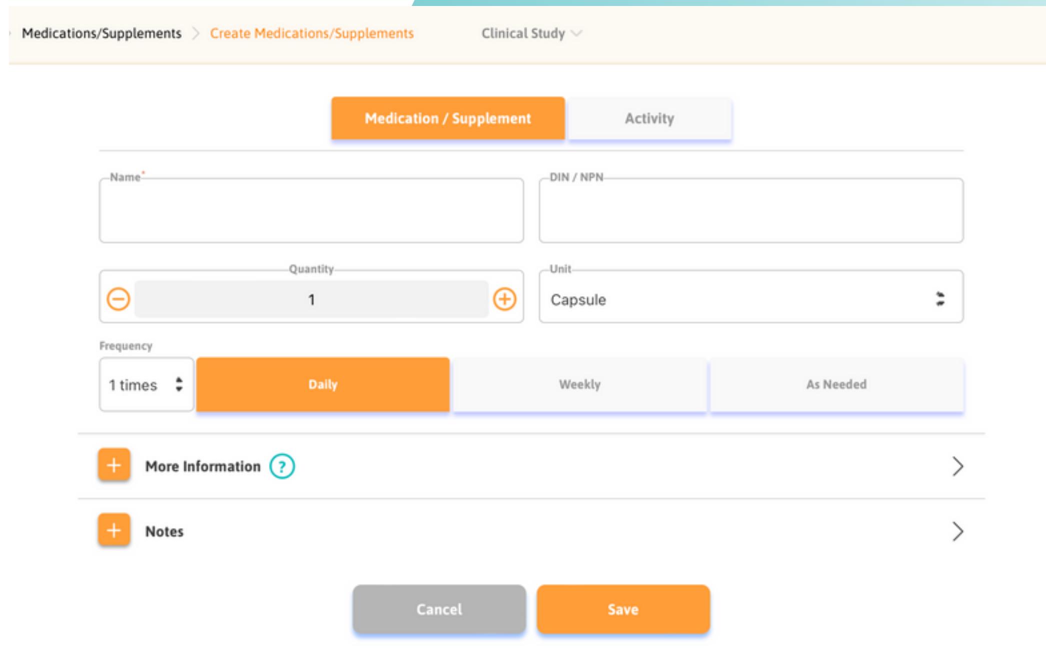


# Medications and Supplements

**Medications and Supplements** is where any medications or supplements that will need to be taken by individuals in a trial can be added. Further customization is available to include specific instructions to each entry.

The image below shows the main **Medications and Supplements** page. This is where all medications/supplements added can be seen, and where the prompt to add a new entry is located.




## How to add a new Medication/Supplement

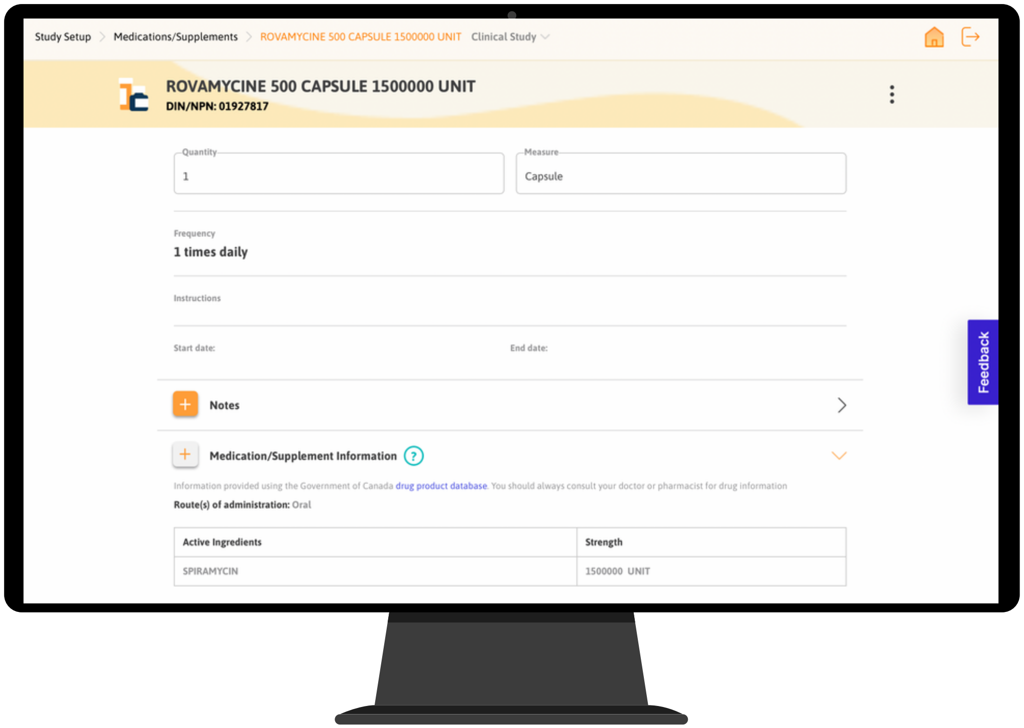
1. First select **Add New Medication/Supplement** from the main page
2. Type the name of the medication/supplement you want to add
   - Note: You can use a preset option that appears or make a custom entry or insert a DIN/NPN
3. Select the quantity that needs to be taken
4. Select the Unit that corresponds to the medication/supplement
5. Select the frequency and time frame that it needs to be taken
6. Add any additional information
7. Add any notes if needed
8. Click **Save**

# Medications and Supplements - Entry Overlook

This page is what will be seen for each **Medication and Supplement** that is inputted.

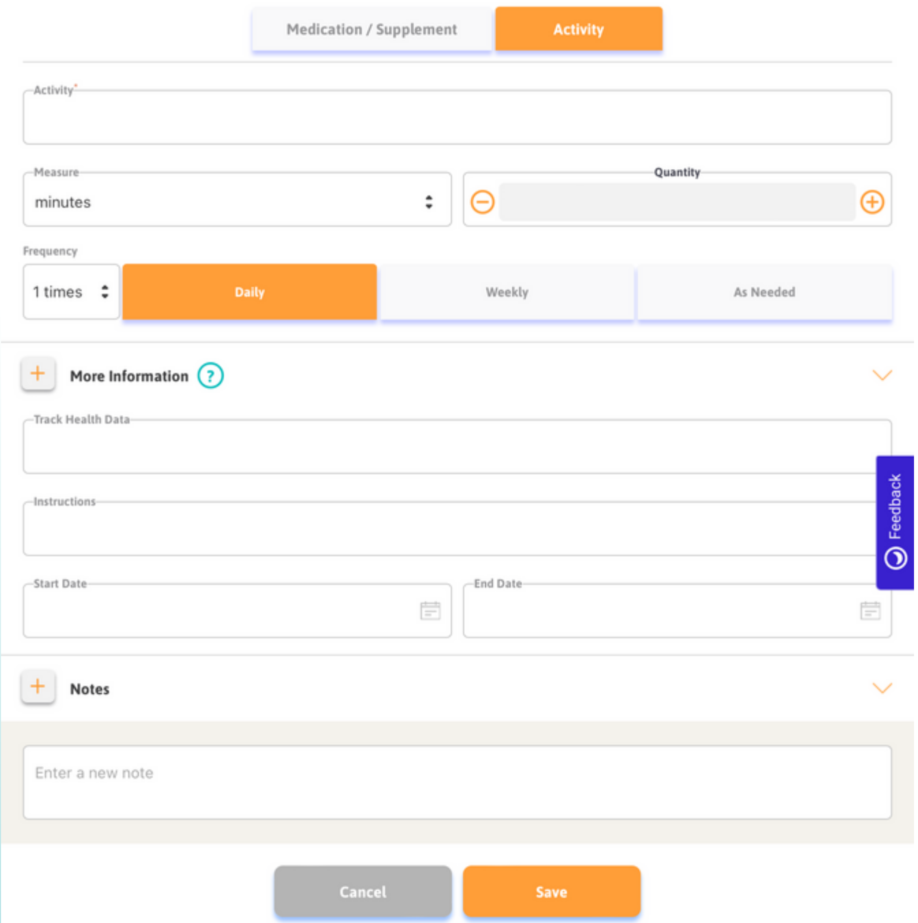
All the information inputted when originally creating a new medication/supplement will be found here

**How to Manage Medications/Supplements:** Select the **three dots** in the top right corner to Edit or Delete the medication/supplement inputted.

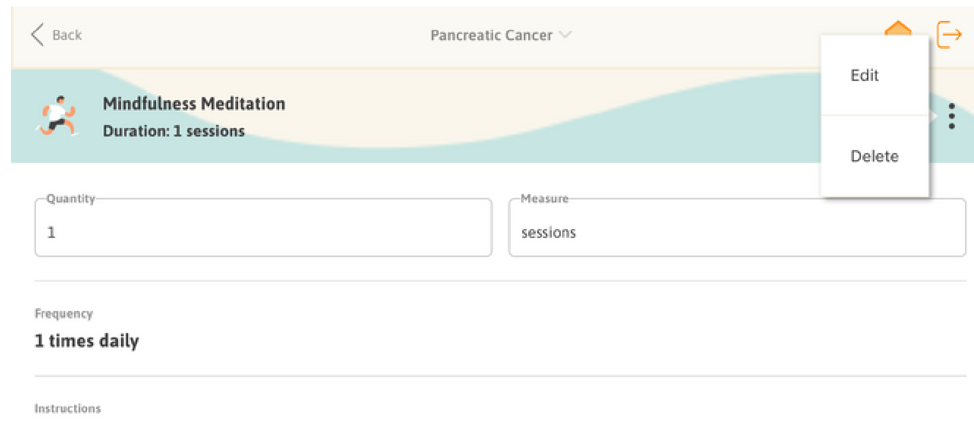


# Activities

**Activity** is where any activities that are done by individuals in a trial can be added. Activities to be examined can be added here for participants to include in their journal entries. Further customization is available to include specific instructions to each entry.




The image below shows the main **Activity** page. This is where all activities that have been added can be seen, and where the prompt to add a new entry is located. To **Edit** or **Delete** an activity, click the **three dots** in the top right corner.




## How to add an Activity:

1. Click **Activity** under **Study Setup**
2. Click the **Add New Activity** button
3. Enter the activity to be tracked
- Note: You can use a preset option that appears or make a custom entry
4. Click the measure dropdown menu and select either hours, minutes, repetitions, or sessions
5. Depending on the measurement selected, choose the subsequent value needed for the activity
6. Set a "**Frequency**" from 1 to 12 times **Daily**, **Weekly**, or **As Needed**
7. Add any additional information or Notes
8. Click **Save**

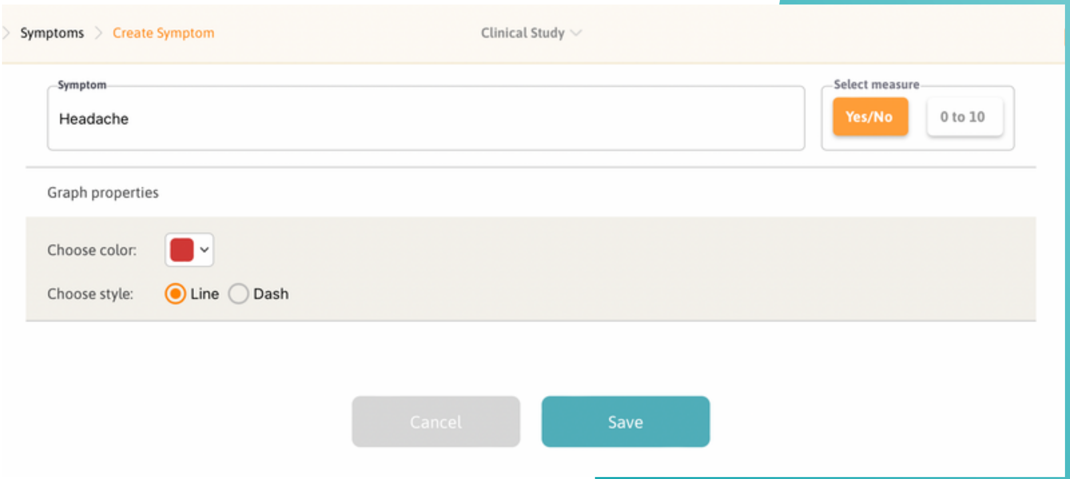
# Symptoms

Any **Symptoms** shown by individuals in a trial can be added and tracked. Common symptoms or symptoms that you want to examine for the study can be customized for participants to include in their journal entries.

The image to the right shows the main "**Symptoms"** page. This is where all added symptoms are shown and where the prompt to add a new entry is located. To Edit or Delete a symptom, click the **three dots** in the top right corner.

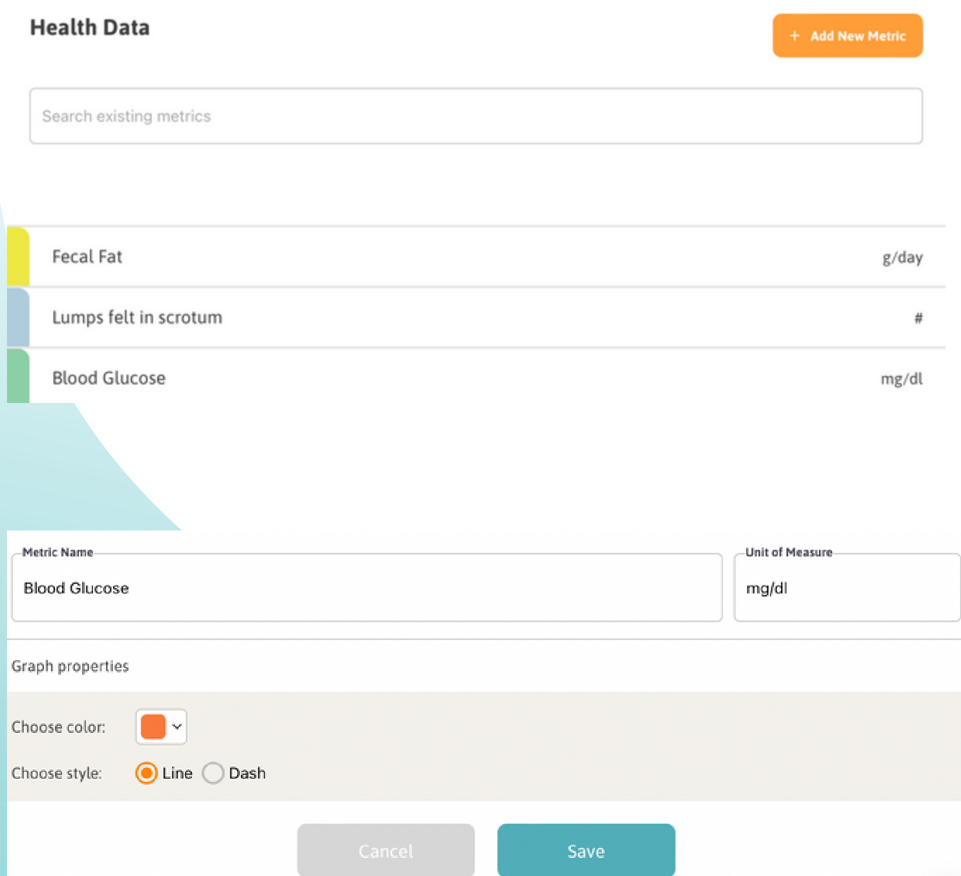

## How to add Symptoms:

1. Select **Symptoms** under **Study Setup**
2. Click the **Add new Symptoms** button
3. Enter the name of the symptom to be tracked
- Note: You can use a preset option that appears or make a custom entry
4. "**Select Measure"** of **Yes/No** or **0 to 10**
5. Once the symptom has been added, chose a colour and style to be associated with it. The colour and style chosen will show up on the **Graph** function
6. Click on **Save**



# Health Data

**Health Data** is used to track specific health-related data such as blood pressure, weight, heart rate, hours of sleep, and even emotions.




## How to add Health Data:

1. Chose **Health Data**
2. Click **Add New Metric**
3. Enter the **Metric Name**
   - Note: You can use a preset option that appears or make a custom entry
4. Select the unit of measurement you will be using (dependant on health data chosen)
5. Choose **Graph** colour and style
6. Click **Save**

The image to the left shows the add **Health Data** page. This is where all Health Data information can be added.

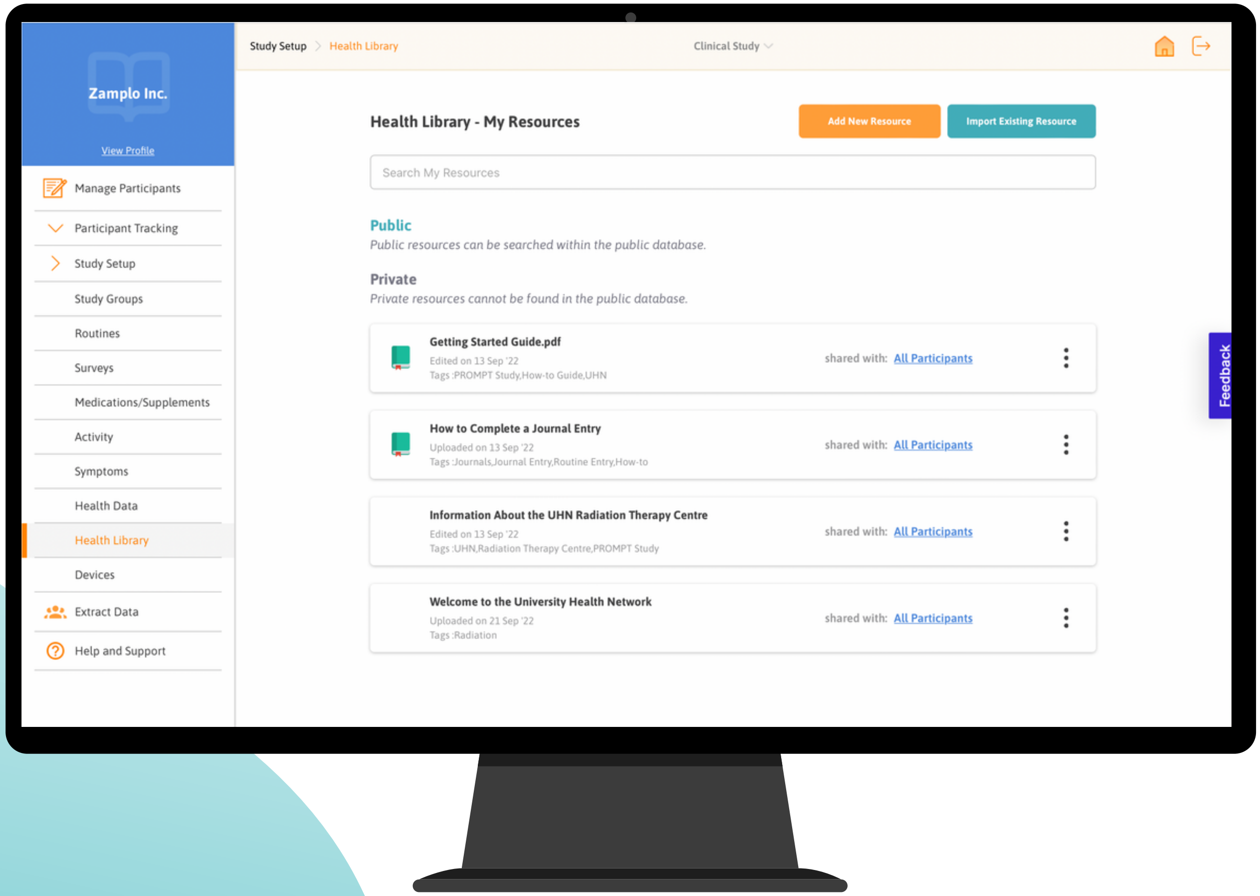
# Health Library: Directory

The **Health Library** can be used to store resources. The resources stored here can be shared with all, or select individuals participating in a trial.

The **Directory** is where you can view all of your private or public resources, whom you have shared resources with, and where you can add new resources. You may choose to share stored resources with all participants within a trial or with a few selected individuals.

**Public:** Resources published into the public category can be searched for and seen within the public database and by participants in a trial

**Private:** Resources published into the private category are only visible to the participants you have selected to share with.

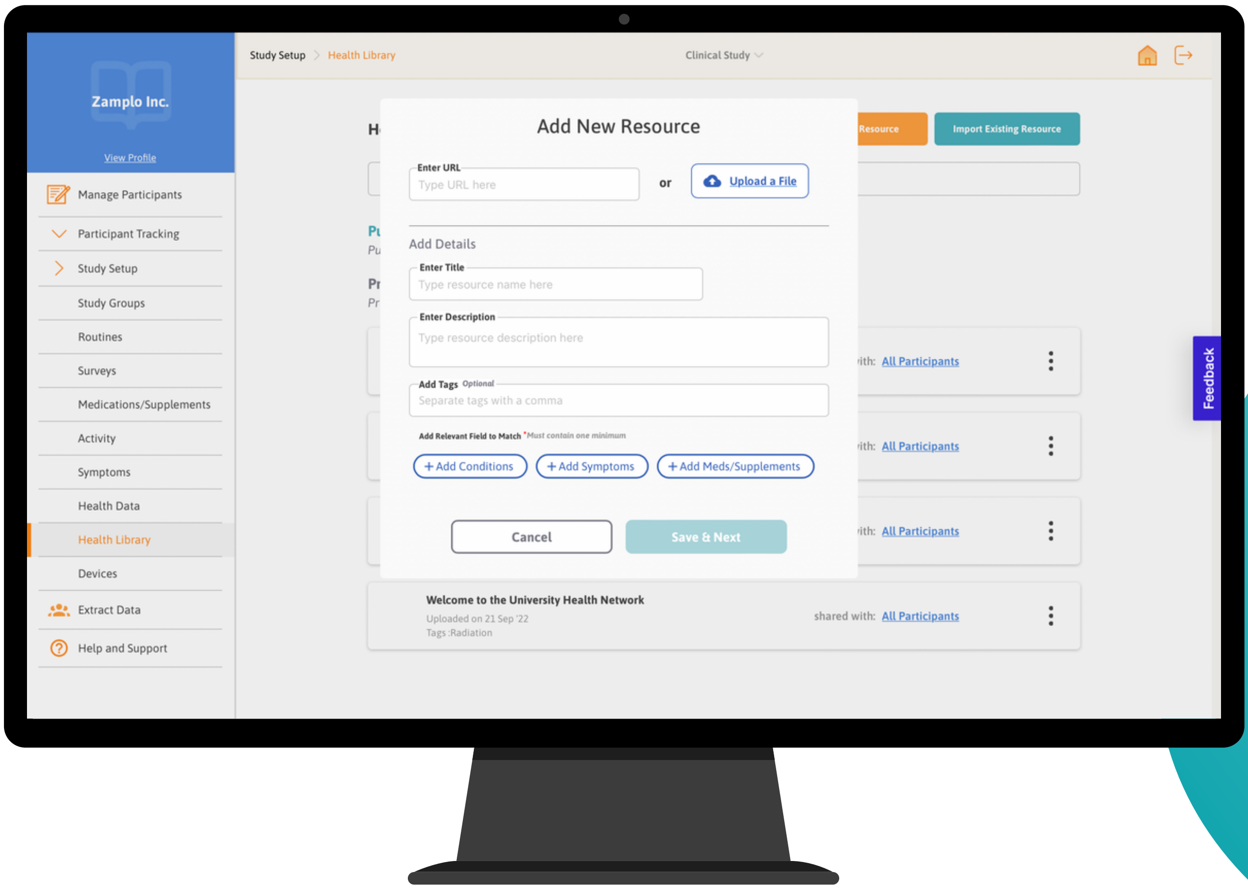


# Health Library: Add New Resources

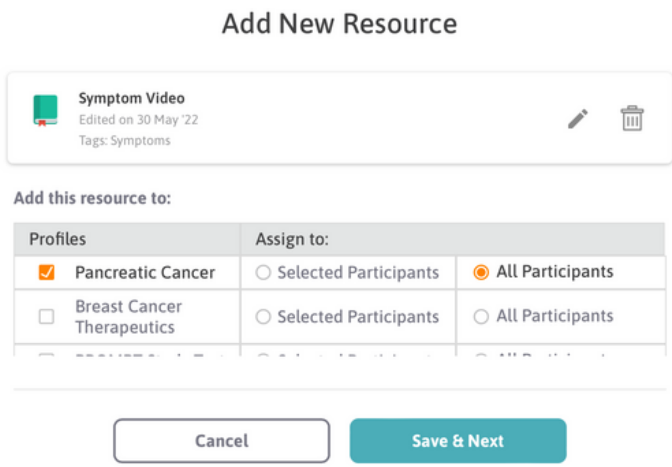
## How to add new resources into the Health Library:

1. Select **Add New Resource** located on the **Directory** page
2. Enter the URL of the resource wanting to be added or upload a pre-existing file
3. Create a title for the resource being added
4. Create a description fort he resource being added
5. Add in any relevant tags or fields to match that are associated with the resource
6. Select **Save & Next**

**Note:** If the resource being added is going to be open on the public database, be sure to include many tags (10 or more) as this will make it easier for individuals not participating in a trial to find these resources on the database.



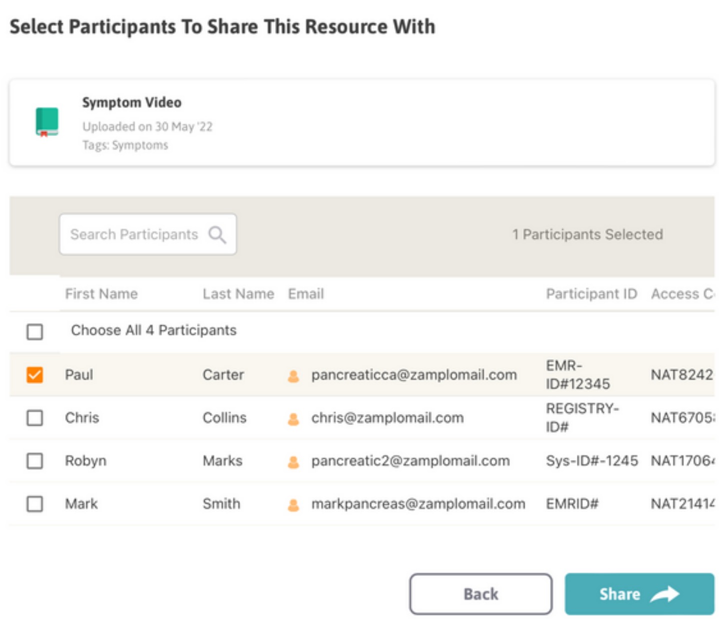
# Health Library: Add New Resources




## How to Send to All Participants

Under **Add this resource to:**

1. Select the profile/trial the resource will be shared to
2. Select **All Participants**
3. Select **Save & Next**




## How to Send to Select Participants

Under **Add this resource to:**

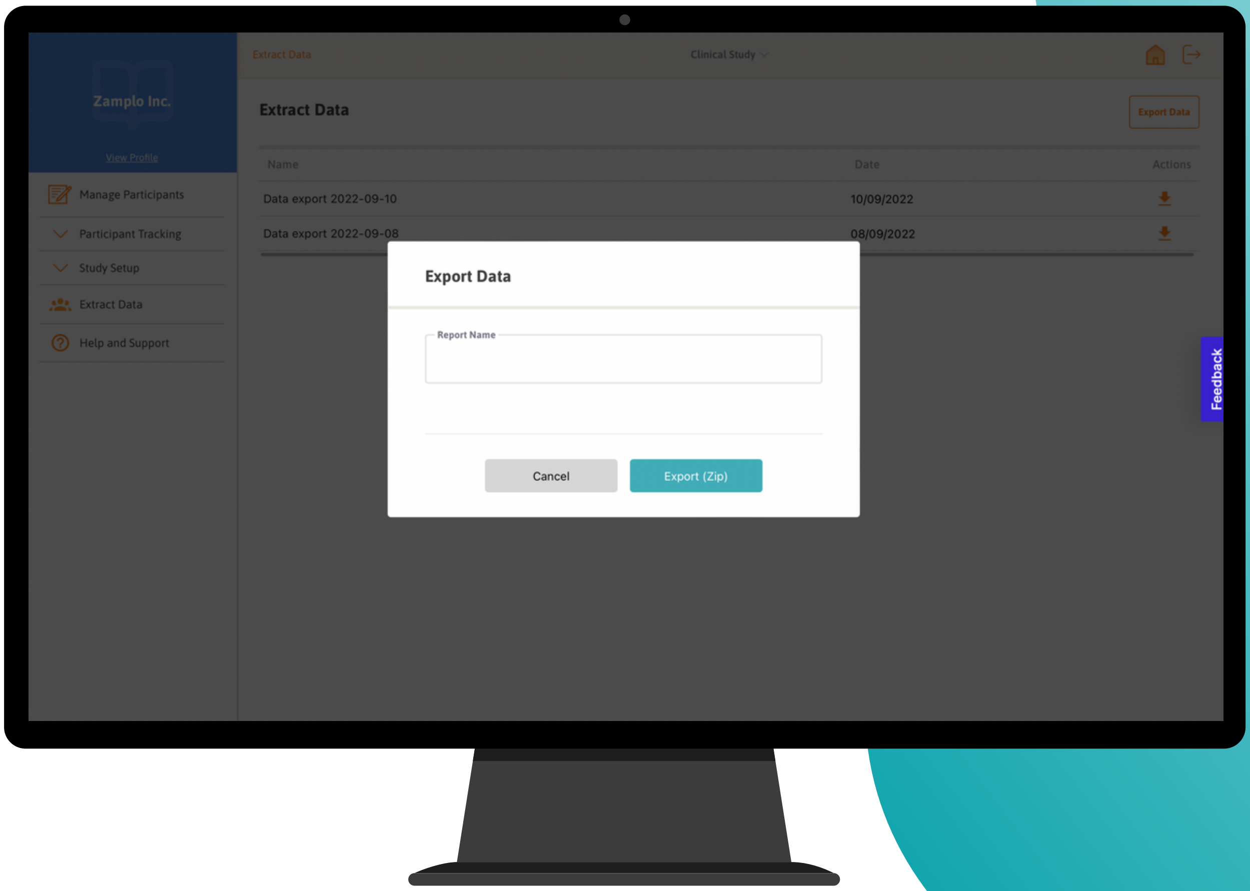
1. Select the profile/trial the resource will be shared to
2. Select **Selected Participants**
3. Select **Save & Next**
4. Choose the specific individuals the resource needs to be shared with
5. Select **Share**

# Extract Data

**Extract Data** provides a secure way to easily extract participant data.

## How to Extract Data

1. Select **Extract Data** located in the main menu
2. The **Report** can be downloaded by clicking the orange download button under "**Actions"**
3. **Reports** can also be searched by clicking on the **Export Data** button
   a. Here you will be prompted to enter the "**Report Name"**
   b. Click **Export (Zip)** to download the zip file and view participant data



# Contact Us

## Zamplo Research Help and Support

Let us assist you in the best ways to use Zamplo Research or with any questions you may have.

**Email Us:** research@zamplo.org
**Text Us:** +1 (587) 907-5357
**Call Us**: +1 (587) 907-5357

## Knowledge Base

Access video tutorials and support articles by clicking here or visiting https://www.zamplo.org/support-tutorials