


**Duke**Medicine


**Pediatric Blood and Marrow Transplant**  
**Adult Blood and Marrow Transplant**  
**Stem Cell Laboratory**

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System Administration for MasterControl Organizers

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# **COMM-PAS-023**

## **SYSTEM ADMINISTRATION FOR MASTERCONTROL ORGANIZERS**

### **1 PURPOSE**

- 1.1 This procedure outlines the process for creating an Organizer and how to place related InfoCards in a common location for easy user access.

### **2 INTRODUCTION**

- 2.1 An Organizer is a collection of objects, including InfoCards, Folders, and Projects, that enable you to create graphical InfoCards (hierarchical tree structures) that show the relationships between InfoCards. Organizers are stored in a Vault.

### **3 SCOPE AND RESPONSIBILITIES**

- 3.1 This procedure covers Organizers in MasterControl.
- 3.2 It is the responsibility of the System Administrator (“SysAdmin”) and the Subadministrator (“SubAdmin”) to create and maintain Organizers.

### **4 DEFINITIONS/ACRONYMS**

- 4.1 Organizers: A hierarchical tree structure that can contain any number of InfoCards, folders, or projects.
- 4.2 Virtual folder: A saved search for future reference.

### **5 MATERIALS**

- 5.1 NA

### **6 EQUIPMENT**

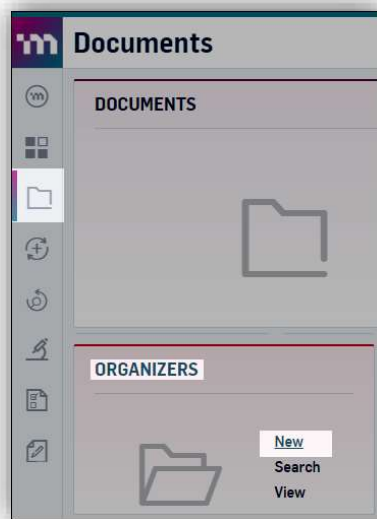
- 6.1 Computer to access MasterControl
- 6.2 MasterControl is validated using Firefox and Chrome.
  - 6.2.1 Do not use Internet Explorer (IE) or Microsoft EDGE.

### **7 SAFETY**

- 7.1 NA

### **8 PROCEDURE**

- 8.1 Create an Organizer
  - 8.1.1 Documents > Organizers > New



8.1.2 Select an InfoCard Type and Subtype, if applicable.

8.1.3 Click Continue.

8.1.4 Complete all necessary fields.

8.1.5 Click Save.

**NOTE:** The system populates the Main File information. Organizer InfoCards have a Main File only if a collection is also published.

**NOTE:** The Organizer displays in **Explorer**. Date Information automatically populates after you save the Organizer InfoCard

8.2 The majority of Organizers are created from Virtual folders (saved searches).

8.3 Create PDF Binder

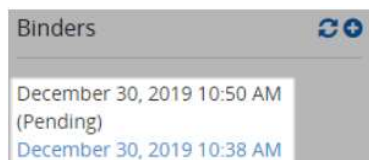
8.3.1 Click Create PDF Binder to create binder and combine all files in the folder into a single PDF. Check the box in the pop-up window to include attachments in the PDF export.



8.3.2 Click Refresh to update the file list.

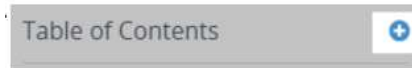


8.3.3 Click the date and time of a previous Binder to download the .zip folder containing the Binder and attachments.



8.4 Create TOC

- 8.4.1 Click Create Table of Contents to generate a PDF of the contents of the folder.



## 8.5 Create a Virtual Folder

- 8.5.1 On the Portal Home Page, click Search.
- 8.5.2 Add the search criteria you want to add to create your virtual folder.
- 8.5.2.1 Enter NAME
- 8.5.2.2 Select Save Search
- 8.5.3 From the **My Settings** section of the **My MasterControl** menu, click **Virtual Folders**.
- 8.5.4 Select the check boxes in the Organizer column to make your virtual folder available to add to Organizers.
- 8.5.4.1 Select Public if this report is to be viewed by all users.
- NOTE:** Only Virtual Folders you have created will be available for you to check in this column and add to Organizers.
- 8.5.5 Select **Virtual Folders** in the toolbar at the top.
- 8.5.6 At the bottom of the Organizer window, a drop-down list of saved searches, labeled Description, will appear. Select the saved search you wish to add to the Organizer. Select Save in the top ribbon. The search will be added to the Organizer you selected.
- NOTE:** If the virtual folder is made public, the InfoCards in the Organizer will be filtered according to the rights of the user who created the virtual folder, regardless of who views them.

## 9 RELATED DOCUMENTS/FORMS

- 9.1 COMM-PAS-022 Configuration of Numbering Series Patterns in MasterControl.

## 10 REFERENCES

- 10.1 MasterControl System Administration Online Help

## 11 REVISION HISTORY

Revision No.	Author	Description of Change(s)
01	M. Christen	• New document

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