AIS Tip Sheet

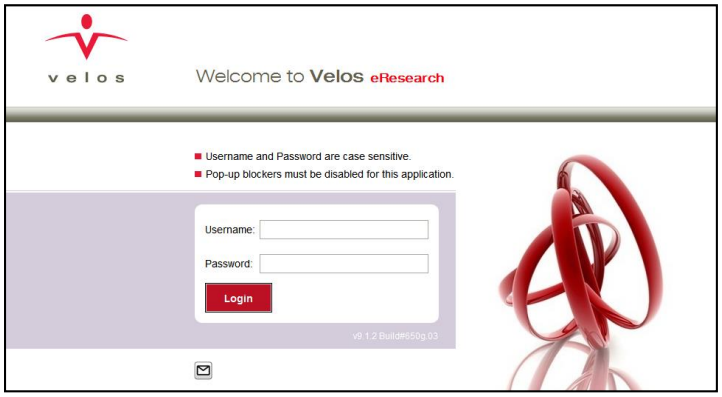
UT Southwestern Medical Center

Velos – Study Team Gadgets

Velos now provides users with the option to utilize "gadgets" to customize the Velos home page. This tip sheet will guide you through the process of setting up your gadgets.

Step I: Log into Velos

1. Type this link in your web browser: **https://velos.swmed.edu**



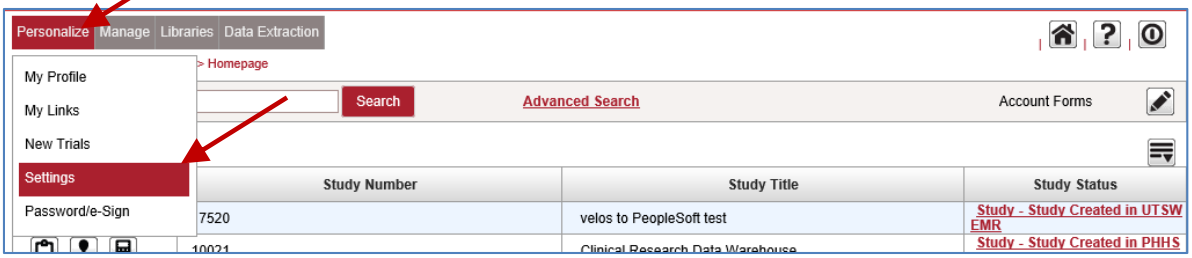
Important Info & Tips

- You must enter your Username in all lowercase letters, but your password as you would normally enter it.
- The Velos default e-Signature is **1234**.

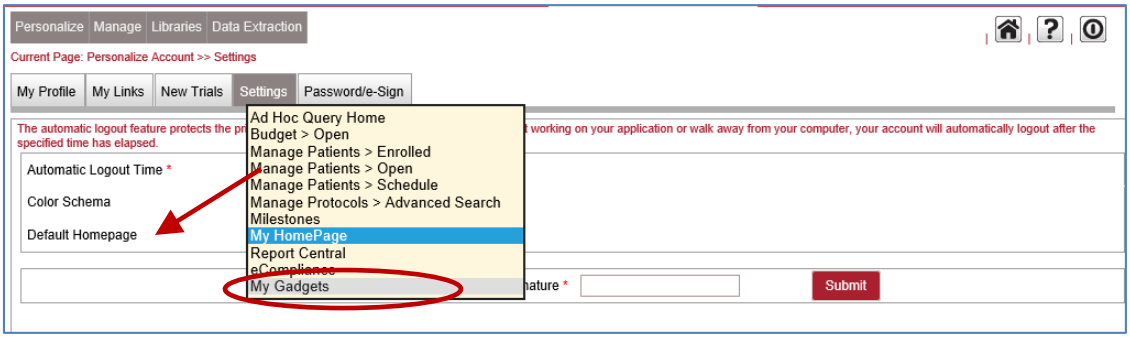
2. Type your login ID in the **Username** field and password in the **Password** field.
3. Click **Login**.
4. To logout, click the **Logout** button.

Step 2: Adjust your Home Page Settings

1. Click on **Personalize**, then click on **Settings** in the drop down list.



2. Click in the Default Homepage field, then click on **My Gadgets** in the drop down list.



For assistance, contact the IR Service Desk at **214-648-7600**, or **SERVICEDESK@utsouthwestern.edu**.

eLearning: http://www.utsouthwestern.edu/about-us/administrative-offices/information-resources/academic-information-systems/systems/velos.html

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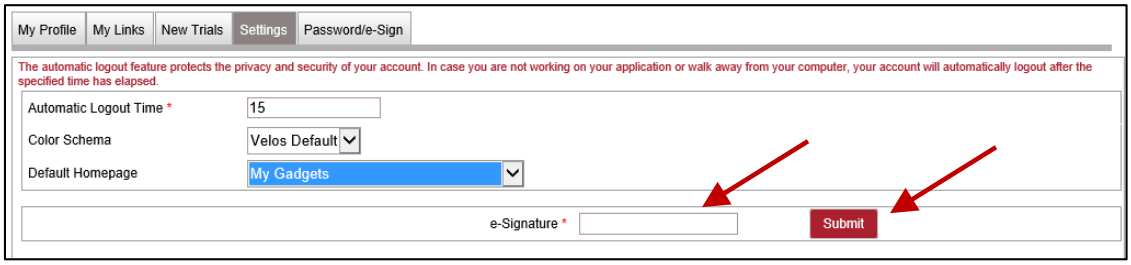
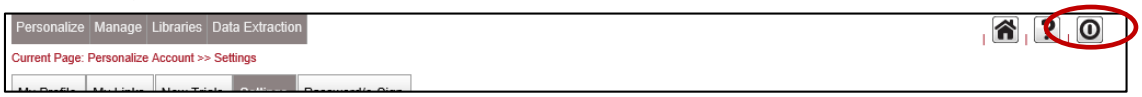
2. Enter your **e-Signature** and click **Submit.**



3. Log out of Velos, and then log back in. *(**NOTE:** The changes will not take effect until you have logged out, and then logged back in.)*

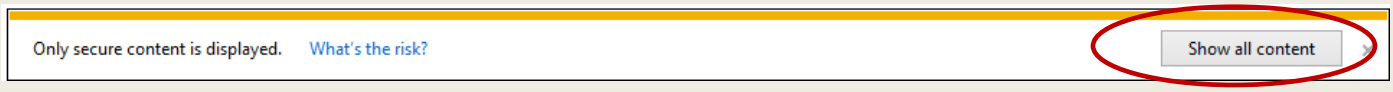


Important: Internet Explorer Setting

If using Internet Explorer to access Velos, the gadgets screen may appear blank. You will need to adjust the internet browswer settings to allow mixed content. You can do this each time you log into Velos, or you can update the Internet Explorer settings to always allow this.

Temporary Fix (each time you log into Velos using Internet Explorer)

1. After following the steps to log into Velos, if your screen is blank, look at the bottom of the screen for the message shown below, and click on the **Show All Content** button.

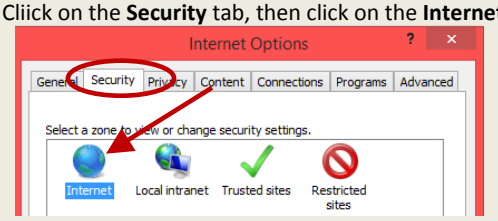


2. Another message window will open and you will need to click on the **Retry** button.
3. The gadgets will then appear on your screen and you can follow the information in this tip sheet to customize your gadgets.

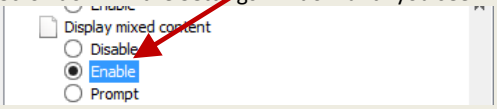
***Note**: You will need to follow the steps above every time you log into Velos if you are using gadgets in the Internet Explorer broswer. Or, you can make an adjustment to your Internet Explorer settings, which will elimnate the need to accept this each time you use Velos in Internet Explorer. These steps are below.*

Permanent Fix

1. Open your Internet Explorer broswer and click on the (**Tools** icon) in the upper right corner., then click on **Internet Options** from the menu.
2. Cliick on the **Security** tab, then click on the **Internet** icon.



3. Click on **Custom level…**
4. Scroll down in the Settings window until you see *"Display mixed content"*, and select the **Enable** radio button.

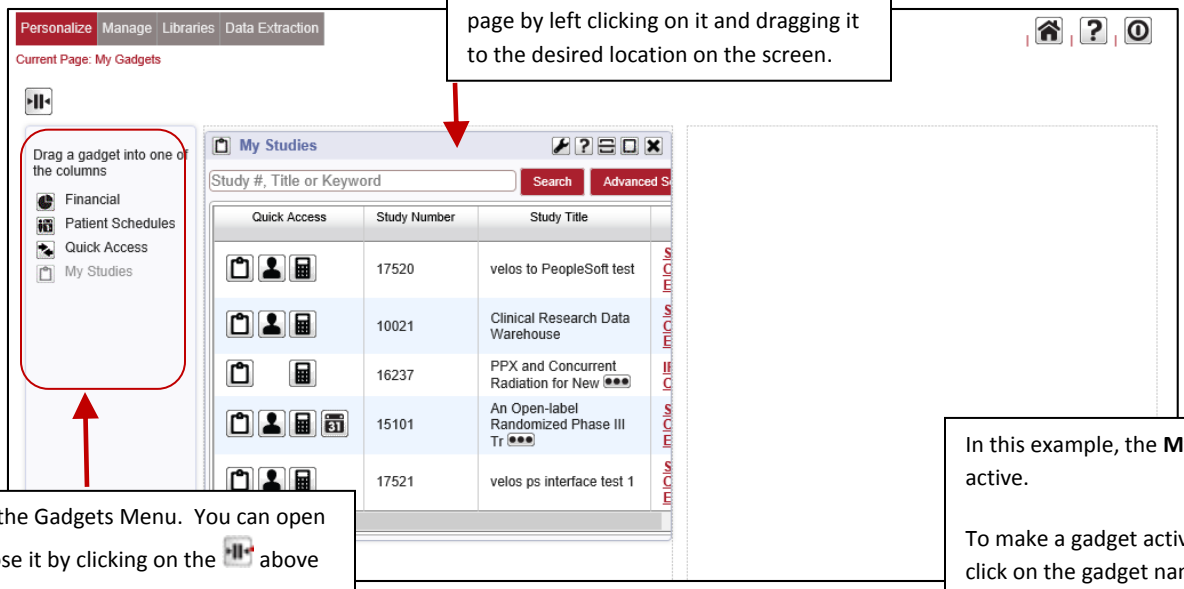


5. Click **OK**, then click **Yes**, then click **OK**.
6. Click the (refresh) button in the browser. If you receive a warning message, click on **Retry**.
7. The screen will refresh, and you will be able to see your gadgets now and going forward.

Gadget Home Page Overview

After logging back into Velos, your new Home Page will appear. The roles and access that you have in Velos will determine what gadgets will default when you log back in, and what gadgets you will have access to add to your page (found in the gadgets menu on the left of the page).

In the screen below, the "My Studies" gadget is automatically added to the Home Page. **(The purpose of this tipsheet is to give you an overview of the Gadgets function. YOUR SCREEN MAY NOT LOOK EXACTLY LIKE THIS.)**



You can move the gadget around on the page by left clicking on it and dragging it to the desired location on the screen.

This is the Gadgets Menu. You can open and close it by clicking on the above the menu.

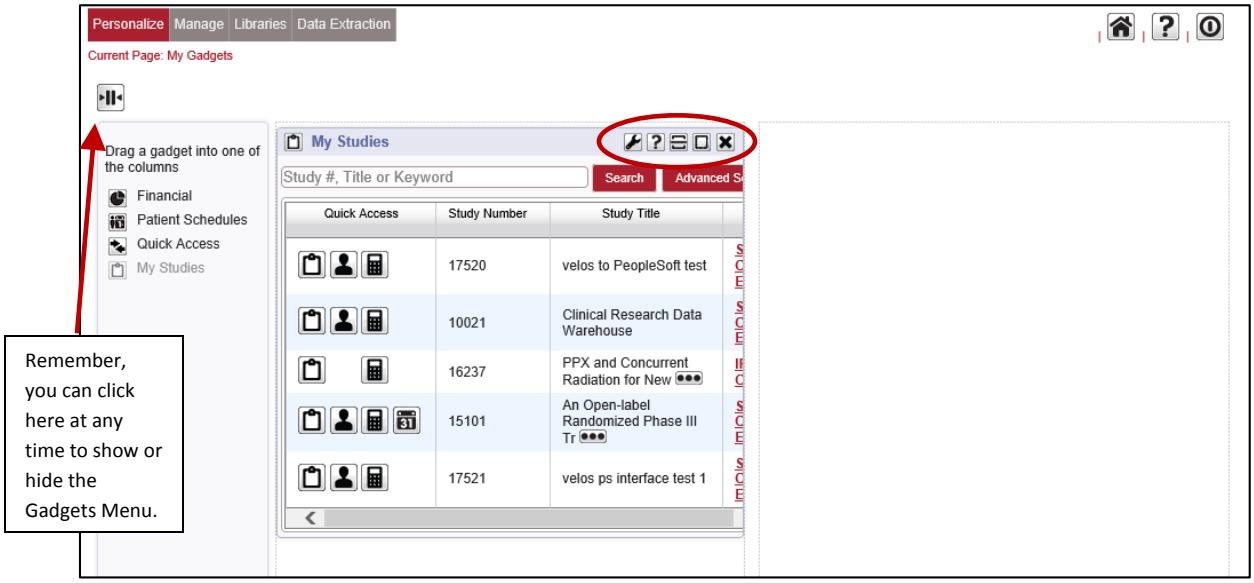
The names of the gadgets you have access to are listed here. (Your options may be different from what is shown here.)

In this example, the **My Studies** gadget is active.

To make a gadget active on the screen, click on the gadget name in the menu on the left and drag it to the middle of the screen.

Each gadget will have a menu in the upper right corner.

Configure Settings – This button is used to customize the items you will see within the gadget.
Minimize/Restore – Click on this to collapse the gadget window. Clicking again will expand the window out again (as shown below)
Expand/Shrink – Click on this to expand the gadget across the entire page. (This will show the gadgets on top of each other instead of side by side.) Click again to make the gadgets appear smaller.
Close Gadget – Click here to close the gadget

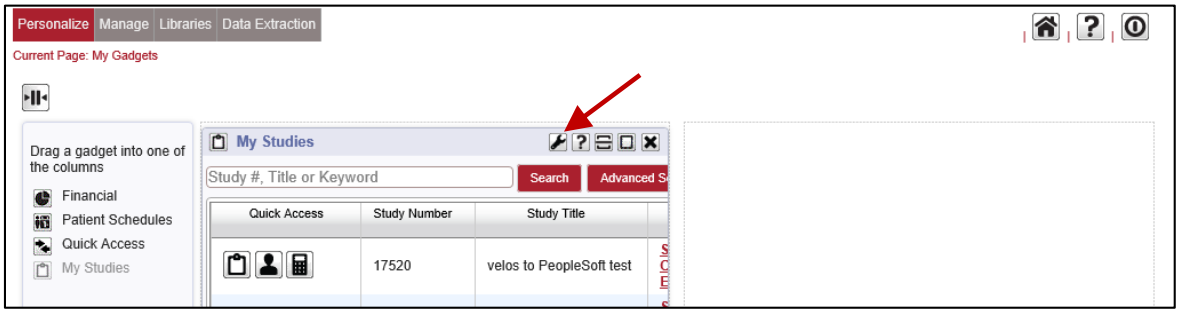


Step 3: Customize the Gadgets on the Page

Step 3 of the tip sheet will provide instruction on how to customize the **My Studies** gadget, the **Patient Schedules** gadget, and the **Quick Access** gadget.

My Studies Gadget

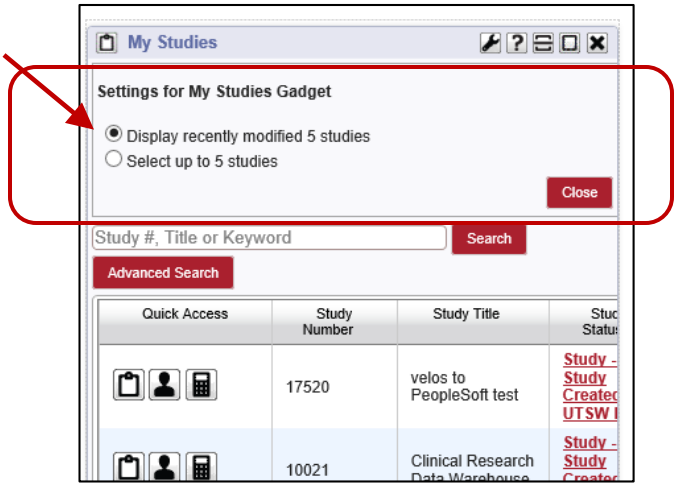
1. Click on the tools icon



2. A settings window for the "My Studies" gadget will open. Select which studies you want to see in the gadget. Select either **"Display recently modified 5 studies"** or **"Select up to 5 studies"**.

"Display recently modified 5 studies"

Clicking the radio button associated with **"Display recently modified 5 studies"** will show you only the last 5 most recently modified studies which you have access to in the system.



"Select up to 5 studies"

Clicking the radio button associated with **"Select up to 5 studies"** will show you only the studies you select, regardless of when they were last modified. You can only select studies that you have access to. Additional fields will appear after you click on this radio button.

3. If you selected ***"Display recently modified 5 studies"*** , no other action is needed.

4. If you selected **"Select up to 5 studies"**, you will now select the studies.

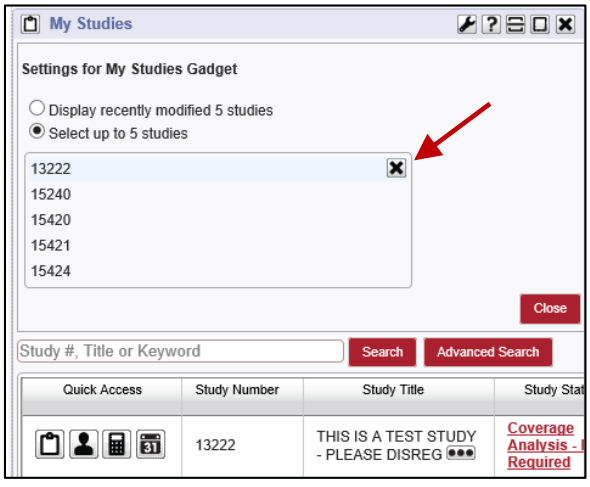
5. You can start entering the study number in the top search field that appears. Enter this information slowly. As you do, a list will drop down below the field.

   Once you see the study number in the drop down list, click the number in the list.

6. The study number will appear in the field. Click **Add**.

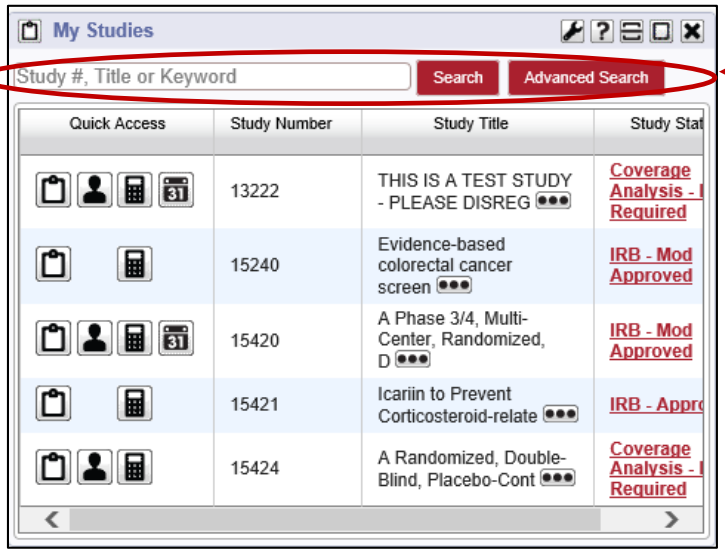
7. The study has been added to the list. You can repeat the steps to add additional studies.

8. Click the ✖ to remove a study from the gadget.



Click **Close** to close the settings window for the My Studies gadget.

9. The "My Studies" window shown here is set up to show the 5 studies selected.

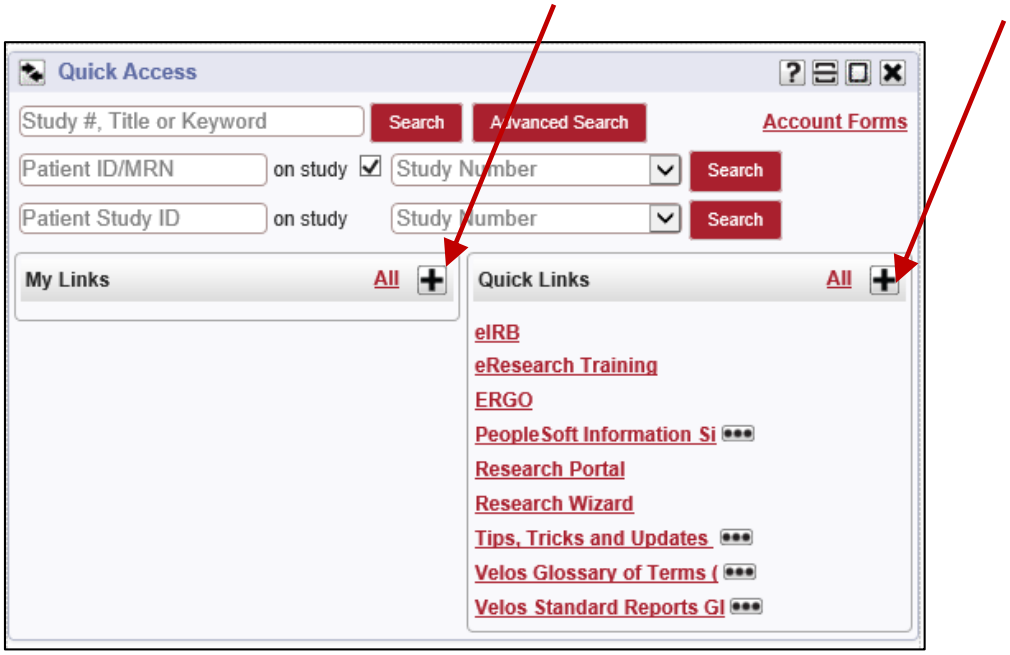


The My Studies gadget will provide a **Search** field and **Advanced Search** option so that you can search for any studies you have access to, which may not be listed in your gadget window.

Quick Access Gadget

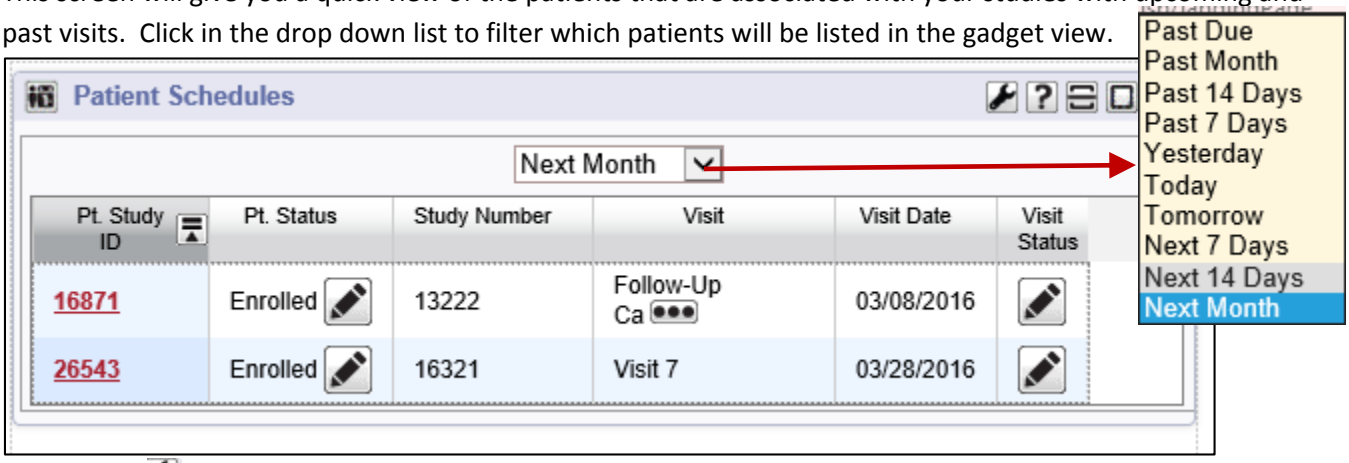
1. The Quick Access gadget includes search options to search by:
   - Study #, Title or Keyword
   - Patient ID/MRN
   - Patient Study ID

2. Click on the ➕ under **My Links** and **Quick Links** to add links to URLs that may be useful to you.



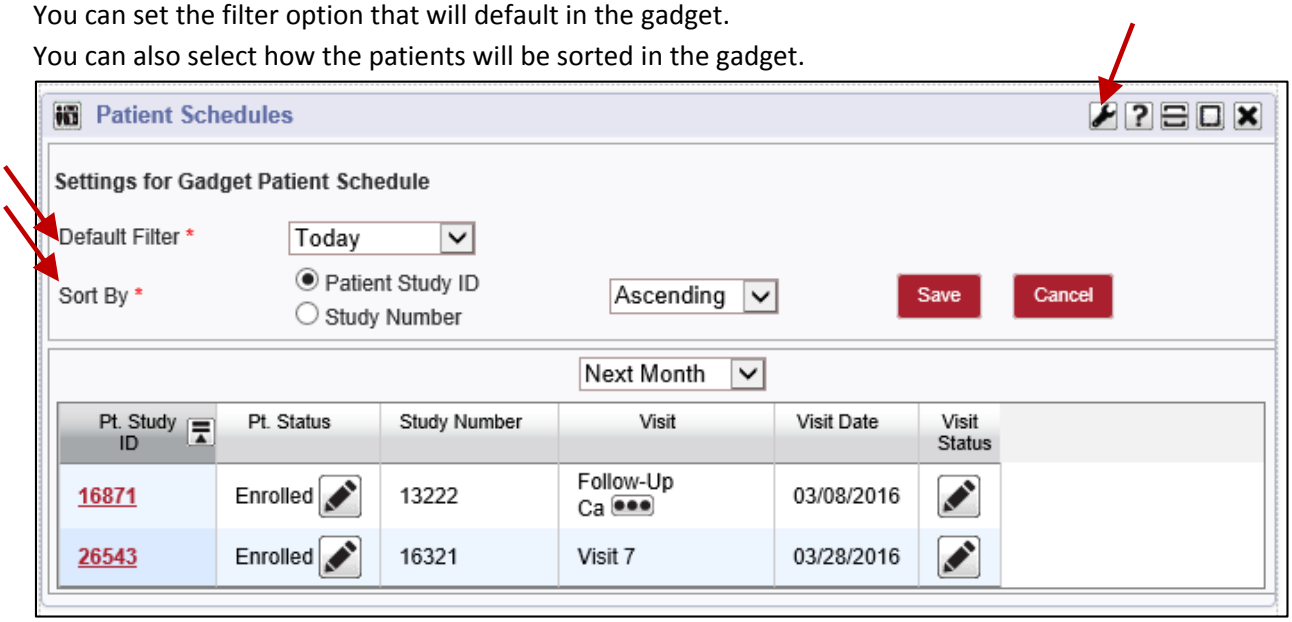
Patient Schedules Gadget

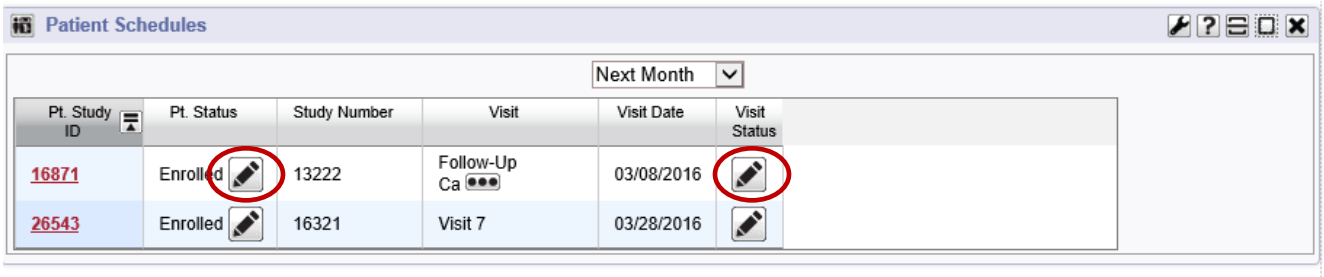
1. This screen will give you a quick view of the patients that are associated with your studies with upcoming and past visits. Click in the drop down list to filter which patients will be listed in the gadget view.



2. Click on the to customize the gadget.

You can set the filter option that will default in the gadget.
You can also select how the patients will be sorted in the gadget.



3. Click **Save** after selecting your options.

4. You can update the **Pt Status** or **Visit Status** from the Patient Schedules gadget. **Be very careful** when doing so, however. You will want to make sure that you are updating the correct visits and the correct studies.