Cohort Management Portal

30 Workflows · 140 Screens · 32 Notifications

4 PERSONAS
- Platform Admin
- Org Admin
- Cohort Admin
- Cohort PI
- Cohort IT Admin

PERSONA 1 · Platform Admin

Platform-level user — runs the portal itself

WF 01 · Login
8 screens · 0 notifications



SCREEN 1 · Portal landing page

The public entry point. The user chooses Login to be taken to the identity provider.



SCREEN 2 · Sign in — username

Keycloak asks for the username or e-mail first; sign-in with a CBB e-mail ID is offered alongside.



SCREEN 3 · Sign in — password

The password is requested on a second step, after the username is accepted.



SCREEN 4 · Platform Admin dashboard

A successful sign-in lands the Platform Admin on the dashboard, with the eight platform sections in the left navigation.

WF 02 · Organization Management
9 screens · 3 notifications



SCREEN 1 · Organization Management — all organizations

Every member organization on the portal, as cards showing contact details and status.



SCREEN 2 · Filtered to Live organizations

The Live filter narrows the list to organizations currently in operation.



SCREEN 3 · Filtered to Offline organizations

The Offline filter shows organizations that have been taken out of service.



SCREEN 4 · Register Organization — organization details

Name, description and contact details for the new organization.



SCREEN 5 · Register Organization — configurations

Authentication provider, barcode generation and registration rules for the organization.



SCREEN 6 · Register Organization — address and org admin

Location details and the first Org Admin account to be created with the organization.



SCREEN 7 · Validation on the registration form

Required fields are flagged inline; the form cannot be submitted until they are supplied.



NOTIFICATION 1 · Organization created

Confirms the organization has been registered and now appears in the list.



SCREEN 8 · Row actions — edit or decommission

Each organization card exposes its actions from a single menu.



NOTIFICATION 2 · Organization updated

Confirms an edit to the organization has been saved.



SCREEN 9 · Decommission Organization

A confirmation step states that the organization is permanently removed from the active list.



NOTIFICATION 3 · Organization decommissioned

Confirms the organization has been taken offline.

WF 03 · View and Edit Specific Organization
2 screens · 0 notifications



SCREEN 1 · Organization details

The organization's own page — name, description and contact details, editable in place.



SCREEN 2 · Organization configurations

Authentication provider, barcode generation, registration rules and primary location for this organization.

WF 04 · User Management
10 screens · 8 notifications



SCREEN 1 · User Management — users across organizations

All administrators and users the Platform Admin can act on, filtered by organization and role.



SCREEN 2 · Users within one organization

The same list narrowed to a single organization.



SCREEN 3 · Onboard User — user details

Name, e-mail and phone number for the new account.



SCREEN 4 · Onboard User — assign role

One or more roles are assigned, each scoped to an organization or cohort.



SCREEN 5 · Validation while onboarding

Missing role or scope is flagged before the account can be created.



NOTIFICATION 1 · User onboarded

Confirms the account was created; account linking stays pending until the user signs in.



SCREEN 6 · Onboarding e-mail

The new user receives a link to verify their e-mail and set a password. The link expires in 72 hours.



SCREEN 7 · Update password

Following the link, the user sets their own password before first use.



SCREEN 8 · Row actions on a user

Edit, disable and decommission are reached from the row menu.



SCREEN 9 · Edit User — details

Name, e-mail and phone number can be corrected after onboarding.



SCREEN 10 · Edit User — assign role

Roles can be added or changed for an existing user.



SCREEN 11 · Disable user

Disabling blocks sign-in without removing the account.



NOTIFICATION 2 · User disabled

Confirms the account can no longer sign in.



SCREEN 12 · Enable user

A disabled account can be restored from the same menu.



NOTIFICATION 3 · User enabled

Confirms the account may sign in again.



SCREEN 13 · Decommission User

A confirmation step explains the account is permanently removed and suggests disabling instead.



NOTIFICATION 4 · User decommissioned

Confirms the account has been removed.

WF 05 · Role Management
3 screens · 1 notification



SCREEN 1 · Role Management — system roles

The roles available across the portal, each with its code and scope.



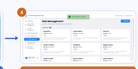
SCREEN 2 · New Role — role information

Name, code and description for the new role.



SCREEN 3 · New Role — role configuration

The scope at which the role applies: portal, organization or cohort.



NOTIFICATION 1 · Role created

Confirms the new role is available for assignment.

WF 06 · Location Management
6 screens · 4 notifications



SCREEN 1 · Location Management

Reusable locations held against an organization.

SCREEN 2 · New Location — location details

Organization, location name and address.

SCREEN 3 · New Location — geographic information

Village, district, city, state, country and postal code, with the option to set this as the primary location.

NOTIFICATION 1 · Location created

Confirms the location is available to the organization.

SCREEN 4 · Edit Location

Address and geographic details can be corrected in place.

NOTIFICATION 2 · Location updated

Confirms the change has been saved.

SCREEN 5 · Choose a new primary location

Removing a primary location requires another active location to take its place.

NOTIFICATION 3 · Primary location set

Confirms which location now acts as primary.

SCREEN 6 · Decommission Location

A confirmation step before the location is withdrawn from use.

NOTIFICATION 4 · Location removed

Confirms the location is no longer available.

WF 07 · Cohort Management
7 screens · 6 notifications

SCREEN 1 · Cohort Management

Cohorts across the selected organization, with allocation progress.

SCREEN 2 · Create New Cohort — cohort details

Organization, cohort name and description.

SCREEN 3 · Create New Cohort — assign roles

Existing users are assigned as Cohort Admin, Cohort PI or Cohort IT Admin.

SCREEN 4 · Create New Cohort — configurations

ID management, participant and appointment options, and the cohort's site.

SCREEN 5 · Validation on the cohort form

Required cohort fields are flagged before submission.

NOTIFICATION 1 · Cohort created

Confirms the cohort now exists and can be allocated.

NOTIFICATION 2 · Cohort could not be created

The error state shown when the cohort cannot be saved.

SCREEN 6 · Edit Cohort

Cohort name, description and assigned roles can be changed.

SCREEN 7 · Cohort configurations

ID management cannot be changed once set; other options remain adjustable.

NOTIFICATION 3 · Cohort updated

Confirms the edit has been saved.

NOTIFICATION 4 · Cohort decommissioned

Confirms the cohort has been withdrawn.

WF 08 · Document Version Management
6 screens · 5 notifications

SCREEN 1 · Document types — portal scope

Document types that apply across the whole portal.

SCREEN 2 · Document types — organization scope

Document types defined for organizations.

SCREEN 3 · Document types — cohort scope

Document types defined for cohorts, with their requirement level.

SCREEN 4 · New Document Type — details

Type name, description and the file types that may be uploaded against it.

SCREEN 5 · New Document Type — scope and requirement

Whether the type applies to the portal, an organization or a cohort, and whether it is mandatory.

NOTIFICATION 1 · Document type created

Confirms the new type is available for upload.

SCREEN 6 · Row actions on a document type

Edit and decommission are reached from the row menu.

SCREEN 7 · Edit Document Type

Name, description, file types and requirement level can be changed.

NOTIFICATION 2 · Document type updated

Confirms the change has been saved.

SCREEN 8 · Decommission Document Type

A confirmation step states the type will no longer be available for new uploads.

NOTIFICATION 3 · Document type decommissioned

Confirms the type has been withdrawn.

WF 09 · Document Management
9 screens · 8 notifications

SCREEN 1 · Portal documents

Documents held at portal level, by document type and status.

SCREEN 2 · Organization documents and their versions

Each document expands to show every stored version, with size, uploader and date — the version history for that file.

NOTIFICATION 1 · Downloading file

Shown while the selected version is prepared for download.

SCREEN 3 · Cohort documents

Documents held against a cohort, including those still awaiting upload.

SCREEN 4 · Upload Documents

Document type, assignment and file are chosen together.

SCREEN 5 · Upload a new version

A further file uploaded against an existing document becomes its next version.

NOTIFICATION 2 · Document uploaded

Confirms the upload completed and the document is stored.

SCREEN 6 · Delete Document

A confirmation step warns that every version is permanently removed.

NOTIFICATION 3 · Document deleted

Confirms the document and its versions have been removed.

PERSONA 2 · Org Admin

Organization-level user — runs one member organization

WF 10 · Login
5 screens · 0 notifications

SCREEN 1 · Portal landing page

The public entry point, before sign-in.

SCREEN 2 · Sign in — username

The identity provider asks for the username first.

SCREEN 3 · Sign in — password

The password step follows.

SCREEN 4 · Select your role

An account holding several roles must choose one for the session — here Org Admin or Cohort IT Admin.

SCREEN 5 · Org Admin dashboard

Users by role and cohort status for the organization.

WF 11 · Organisation Management of Assigned Organization
2 screens · 1 notification

SCREEN 1 · My Organization

The organization's profile: description, website, contact details and primary location.

SCREEN 2 · Edit organization details

Edit turns the profile into a form: name, description and contact details. Save stays disabled until something changes.

WF 12 · Location Management
4 screens · 3 notifications

SCREEN 1 · Location Management

Every location as a card with its address; the primary location is tagged.

SCREEN 2 · New Location

Location name, address and geographic details, with the option to make it the primary location.

SCREEN 3 · Location actions menu

Each location's ⋮ menu offers Edit and Decommission.

SCREEN 4 · Edit Location

The same form, pre-filled; the primary-location flag can be moved here.

WF 13 · Cohort Management
4 screens · 3 notifications

SCREEN 1 · Cohort Management

Cohorts as cards, under a Cohort ID allocation bar: an organization gets 9 cohort IDs and decommissioned cohorts keep theirs.

SCREEN 2 · Create New Cohort

A full page: cohort name and description, Cohort Admin / PI / IT Admin assignments from existing users, then cohort configuration.

SCREEN 3 · Cohort actions menu

Each cohort's ⋮ menu offers Edit and Decommission.

SCREEN 4 · Edit Cohort

The same page, pre-filled, including who currently holds each cohort role.

WF 14 · User Management
3 screens · 3 notifications

SCREEN 1 · User Management

Users with every role they hold, filterable by role and searchable by name or e-mail.

SCREEN 2 · Onboard User

Name, e-mail and phone, then one or more roles, each tied to a cohort where the role needs one.

SCREEN 3 · User actions menu

Each user's ⋮ menu offers Edit, Disable and Decommission.

SCREEN 4 · Edit User

User details and the full list of assigned roles; e-mail is fixed once onboarded.

WF 15 · Document Management
5 screens · 5 notifications

SCREEN 1 · Organization documents

Document types required at organization level, with upload status.

SCREEN 2 · Upload Documents

Document type, name, description and file; several documents can be added in one go.

SCREEN 3 · Portal documents

Portal-wide reference documents — view only for this role.

SCREEN 4 · Cohort documents

Each cohort's documents, chosen with the cohort selector.

SCREEN 5 · Document versions

A document type expands to list every stored version with size, upload date and uploader.

PERSONA 3 · Cohort Admin

Cohort-level administrator — runs the day-to-day cohort

WF 16 · Login
5 screens · 0 notifications

SCREEN 1 · Portal landing page

The public entry point, before sign-in.

SCREEN 2 · Sign in — username

The identity provider asks for the username first.

SCREEN 3 · Sign in — password

The password step follows.

SCREEN 4 · Select your role

This account also holds Cohort PI and Cohort IT Admin; one role is chosen for the session.

SCREEN 5 · Cohort Admin dashboard

Cohort sites, facilitators, participants and enrolment rate at a glance.

WF 17 · Cohort Management of Assigned Cohort
2 screens · 1 notification

SCREEN 1 · My Cohorts

The cohorts this admin is responsible for.

SCREEN 2 · Edit Cohort

Cohort details and configuration, opened for editing.

NOTIFICATION 1 · Cohort updated

Confirms the cohort change has been saved.

WF 18 · Facilitator Management
6 screens · 1 notification

SCREEN 1 · Facilitators

Facilitators assigned to the selected cohort.

SCREEN 2 · Onboard Facilitator

Facilitator details are entered against a cohort.

NOTIFICATION 1 · Facilitator onboarded

Confirms the facilitator was added; account linking stays pending until they sign in.

SCREEN 3 · Bulk Onboard Facilitators

A template of pre-agreed columns is used to add many facilitators at once.

SCREEN 4 · Bulk onboard — file selected

The chosen file is listed before the import is started.

SCREEN 5 · Bulk onboard — importing

The import runs in the background and may take a moment for larger files.

SCREEN 6 · Import results

How many rows succeeded and how many failed.

SCREEN 7 · Import memo

Import and import history are reached from the same control.

SCREEN 8 · Facilitator import history

Every past import with its counts, status and errors.

WF 19 · Participant Management
6 screens · 1 notification

SCREEN 1 · Participants

Participants in the cohort, filterable by barcode, gender, date of birth and enrollment date.

SCREEN 2 · Enroll Participant

Participant details are captured against the cohort and its barcode.

NOTIFICATION 1 · Participant enrolled

Confirms the participant has been added to the cohort.

SCREEN 3 · Bulk Import Participants

Participants are imported in bulk from the pre-agreed column template.

SCREEN 4 · Bulk import — importing

The import runs in the background.

SCREEN 5 · Import results

The outcome of the bulk import, row by row.

SCREEN 6 · Participant import history

Past participant imports with counts and errors.

WF 20 · Appointment Management
4 screens · 1 notification

SCREEN 1 · Appointments

Appointments for the cohort, by status, assessment and date.

SCREEN 2 · New Appointment

An appointment is scheduled against a participant barcode, visit, assessment and site.

NOTIFICATION 1 · Appointment scheduled

Confirms the appointment was created for that participant barcode.

SCREEN 3 · Bulk Import Appointments

Appointments are imported in bulk from a template.

SCREEN 4 · Appointment import history

Past appointment imports with counts and errors.

WF 21 · Barcode Generator
1 screen · 0 notifications

SCREEN 1 · Barcode Generator

Barcodes are generated for a cohort, up to 20 at a time.

WF 22 · Document Management
3 screens · 3 notification

SCREEN 1 · Document Management

Cohort documents by type, with their upload status.

SCREEN 2 · Upload Documents

Document type, assignment and file are chosen together.

SCREEN 3 · Uploading document

Progress is shown while the file is saved to the server.

NOTIFICATION 1 · Document uploaded

Confirms the document was uploaded successfully.

PERSONA 4 · Cohort PI

Principal investigator — oversees a cohort

WF 23 · Login
5 screens · 0 notifications

SCREEN 1 · Portal landing page

The public entry point, before sign-in.

SCREEN 2 · Sign in — username

The identity provider asks for the username first.

SCREEN 3 · Sign in — password

The password step follows.

SCREEN 4 · Select your role

The account holds several roles; Cohort PI is chosen for the session.

SCREEN 5 · Cohort PI dashboard

Enrolment trend · initialisation status and cohort sites for the cohort.

WF 24 · Cohort Management of Assigned Cohort
1 screen · 0 notifications

SCREEN 1 · My Cohorts

The cohorts this PI oversees, with description and last update.

WF 25 · Facilitator Management
2 screens · 0 notifications

SCREEN 1 · Facilitators

Facilitators assigned to the selected cohort, with e-mail and phone.

SCREEN 2 · Export options

The list can be exported as XLSX or CSV.

WF 26 · Participant Management
2 screens · 0 notifications

SCREEN 1 · Participants

Participants with CBB and cohort barcodes, date of birth, gender and enrollment date; filterable by each.

SCREEN 2 · Export options

The filtered list can be exported as XLSX or CSV.

WF 27 · Appointment Management
2 screens · 0 notifications

SCREEN 1 · Appointments

Appointments by date, with assessment, start and end time, site and ingestion status.

SCREEN 2 · Bulk actions menu

For the PI, bulk actions are exports only: XLSX or CSV.

WF 28 · Document Management
5 screens · 5 notifications

SCREEN 1 · Cohort documents

Document types the cohort needs, with suggested file types and upload status.

SCREEN 2 · Document versions

A document type expands to list every stored version.

SCREEN 3 · Upload Documents

The PI can upload cohort documents; type and cohort are fixed; name, description and file are entered.

SCREEN 4 · Portal documents

Portal-wide reference documents, view only.

SCREEN 5 · Organization documents

Organization-wide reference documents, view only.

PERSONA 5 · Cohort IT Admin

Cohort IT administrator — cohort documents and config

WF 29 · Login
5 screens · 0 notifications

SCREEN 1 · Portal landing page

The public entry point, before sign-in.

SCREEN 2 · Sign in — username

The identity provider asks for the username first.

SCREEN 3 · Sign in — password

The password step follows.

SCREEN 4 · Select your role

The account holds several roles; Cohort IT Admin is chosen for the session.

SCREEN 5 · Landing on Document Management

This role opens straight into Document Management — its only section.

WF 30 · Document Management
9 screens · 8 notifications

SCREEN 1 · Portal documents

Reference documents that apply across the portal.

SCREEN 2 · Document versions

A document expands to show every stored version with size, uploader and date.

NOTIFICATION 1 · Downloading file

Shown while the selected version is prepared.

NOTIFICATION 2 · Download complete

Confirms the file has been downloaded.

SCREEN 3 · Organization documents

Documents held at organization level.

SCREEN 4 · Cohort documents

Documents and configuration files for the cohort, with their requirement level.

SCREEN 5 · Upload Documents

Document type, assignment and file are chosen together.

NOTIFICATION 3 · Uploading document

Progress while the file is saved to the server.

NOTIFICATION 4 · Document uploaded

Confirms the upload completed.

SCREEN 6 · Cohort documents after upload

The uploaded file now appears against its document type.

SCREEN 7 · Delete Document

A confirmation step warns that every version is permanently removed and cannot be undone.

NOTIFICATION 5 · Document deleted

Confirms the document has been removed.