TRIAL INTERACTIVE

APPLICABLE TO:

- Administrators
- Room Managers
- Editors
- Readers

- eTMF
- Study Start-Up
- Collaborate

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1. Log into Trial Interactive and click on the name of the room you wish to enter.

2. Navigate to either the eTMF, SSU, or QC Review Module depending on which dashboard you want to customize.
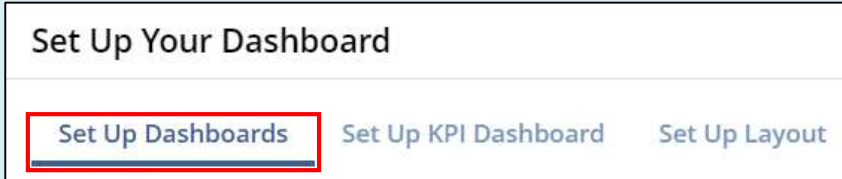
⚠️ Some dashboards may not be accessible to you depending on user configuration.

3. To customize your Dashboard, click the **Edit Dashboard** button at the top left of your screen.

TRANSPERFECT
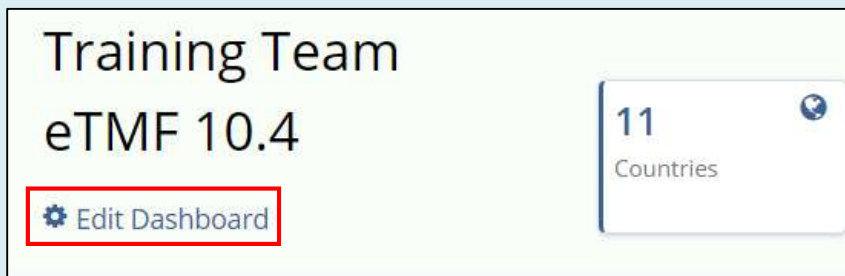
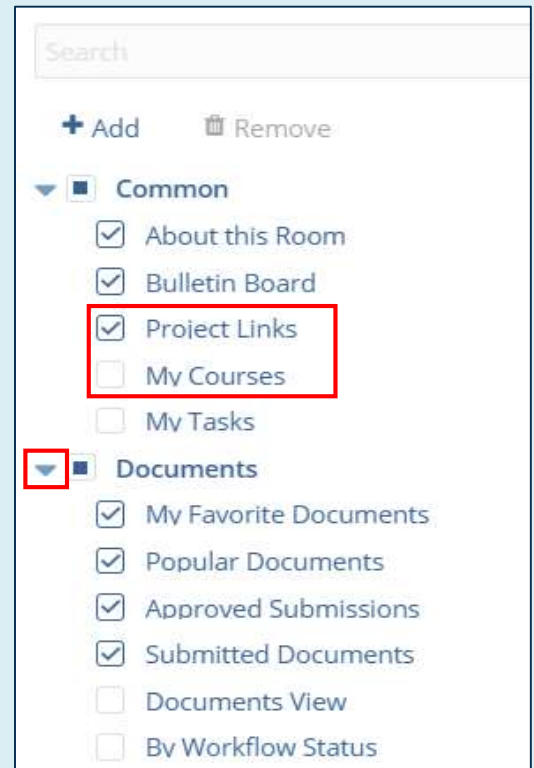## Setting up your individual Dashboards:

4. Click **Setup Dashboards** to start editing dashlets.

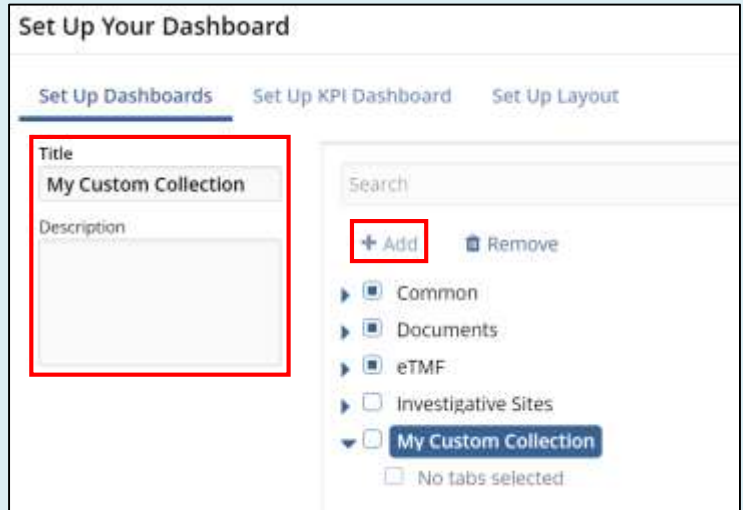5. Click the box next to a dashlet to show or hide it.

Users can expand groupings to see
the list of included dashlets, by clicking
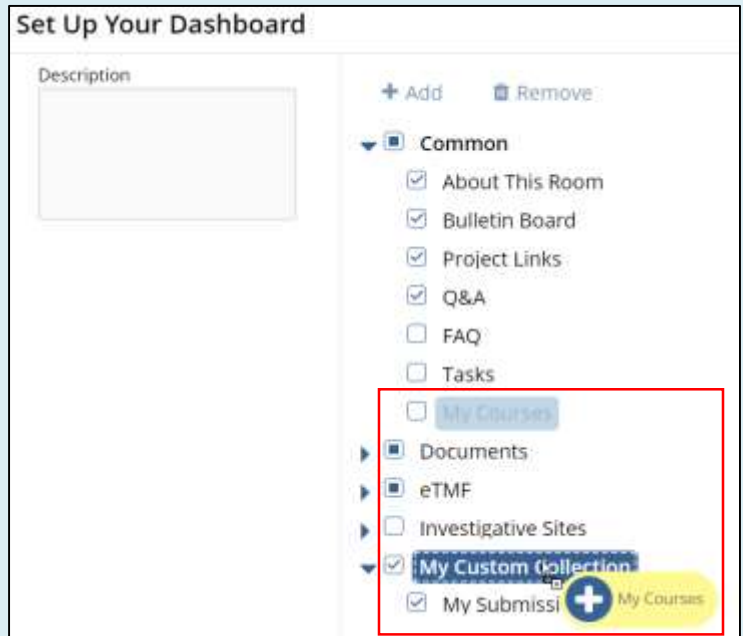on the small arrow next to one.

6. Users can create custom groupings of dashlets by clicking the **Add** button;

a. Enter a name and a (optional) description for your custom grouping in the text boxes on the left.

b. Click and drag individual dashlets into the newly-created dashlet grouping.

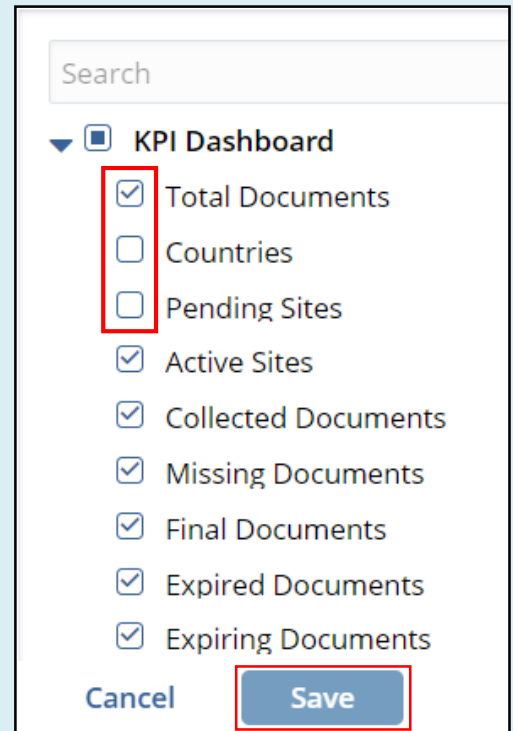*c*. Hit **Save** to make your changes effective.

Customizing the KPI Dashboard:

7. Users can customize which KPI indicators show at the top-right of their eTMF Dashboard, in a manner similar to editing dashlets.
First, switch to the tab named **KPI Dashboard**.

8. Check/uncheck the boxes to activate or remove squares from the KPI area in the Dashboard. Then click **Save**.

9. Changes are applied immediately. See screenshot below where **Countries** and **Pending Sites** have been hidden.
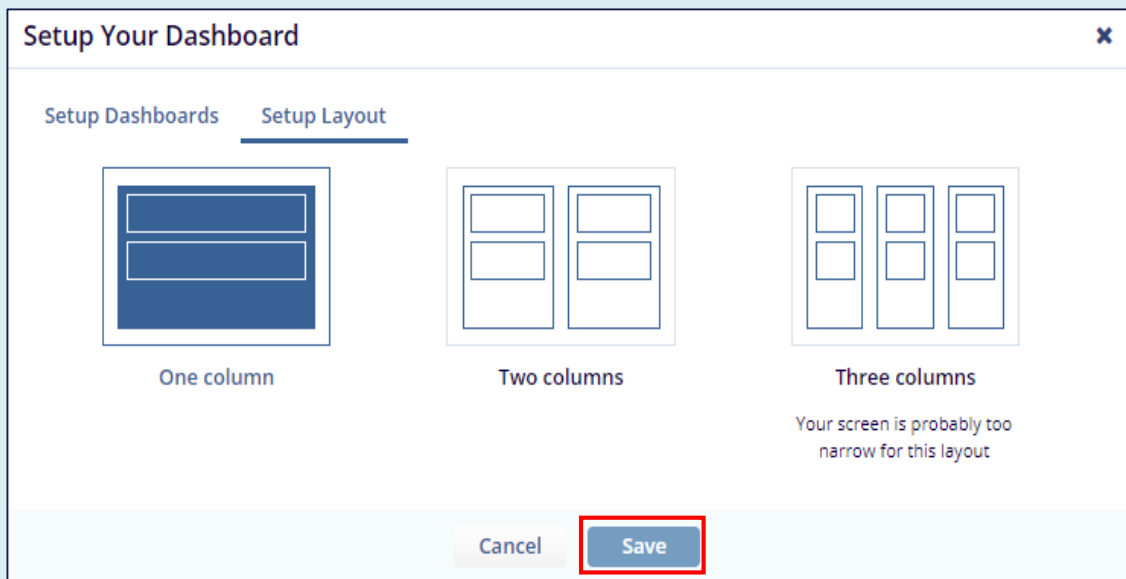

Administrators can create or edit default setups for dashboards, separate for each user level.

Changing the Dashboard layout:

10. Users can switch to the **Set Up Layout** tab and choose from **One**, **Two**, or **Three Columns.**

Note: Some screens may be too small for the three-column layout.

11. Click **Save** to make your changes effective.