

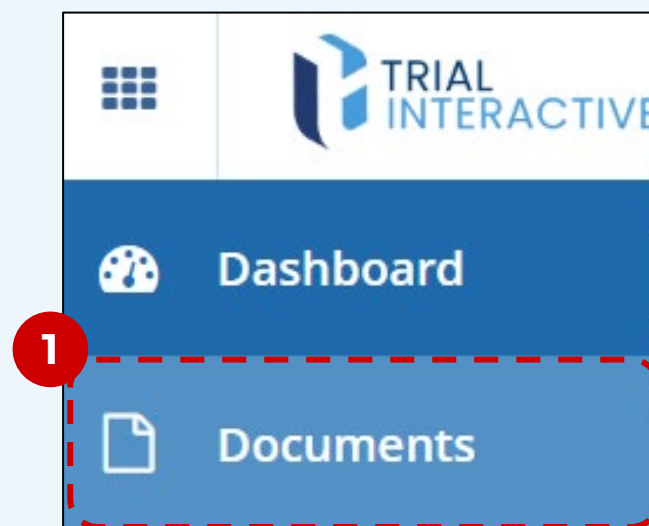
How to Personalize the Document Grid

TI version 10.6

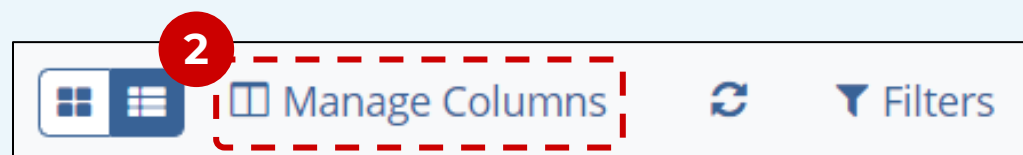
APPLICABLE TO:


- Admin
- Manager
- Editor
- Reader
- eTMF
- Collaborate
- eISF

1 Enter a TI room and navigate to the **Documents Library**.

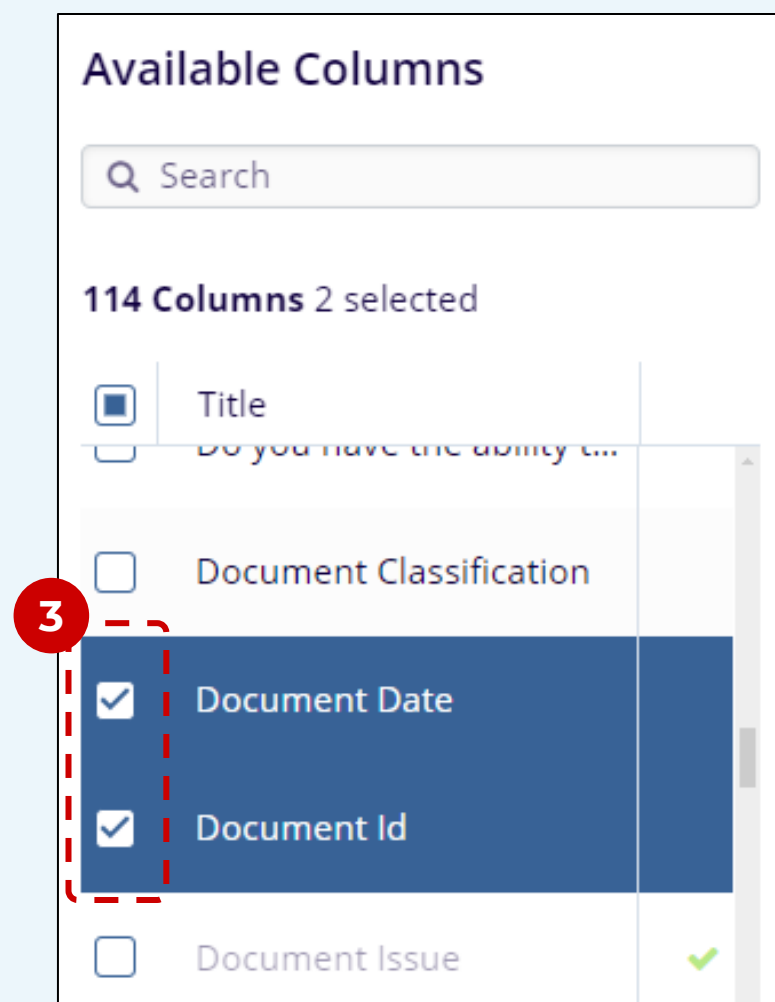


2 In the grid heading, locate and click the **Manage Columns** button.



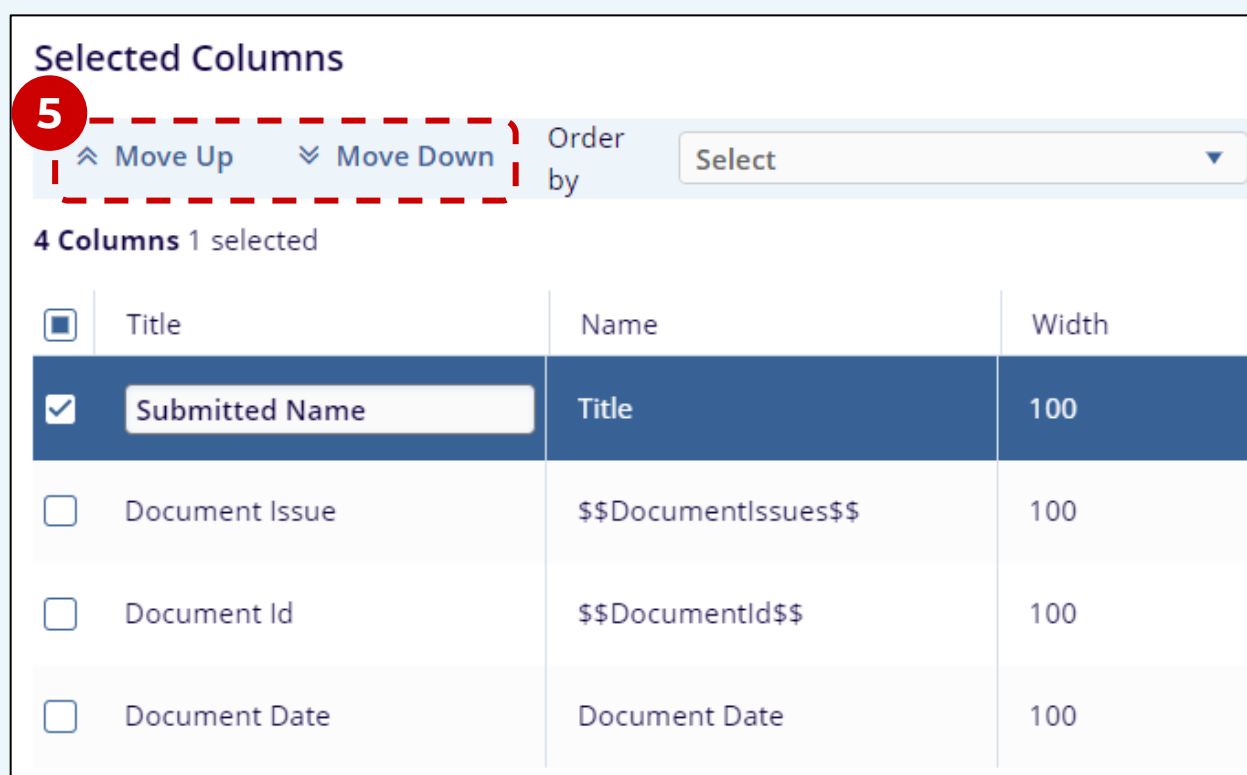
 In this menu, users can define what data appears next to each document entry by changing the column headers for the grid.

3 Choose from the **Available Columns** or use Search to locate a specific metadata type.

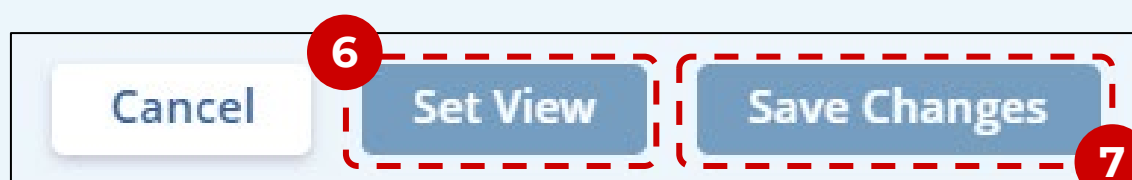


4 Drag-and-drop the chosen fields to the Selected Columns area to the right.

5 In Selected columns, you can customize the headers and the **order** in which they appear.

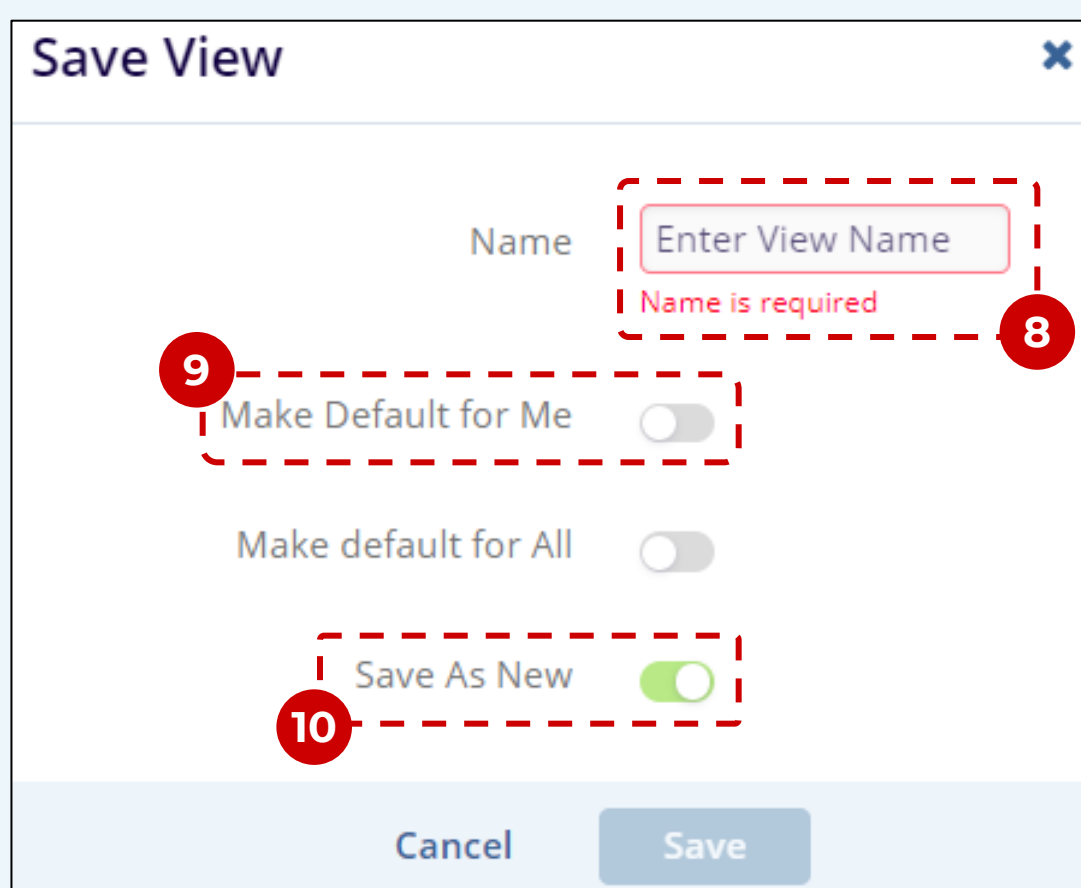


6 At the bottom of the window, use **Set View** to see the results of your changes.



7 If you're confident of your edit you can use **Save Changes** instead.

8 Whenever you save changes you either create or overwrite a "view", that is, a specific header layout. A **name** is always required.



9 You can save a view as your **default**.
Admins can set a universal default shared by all users.

10 **Save as New** can be used only when the name of the view is not already in use.

TI Back on the grid, the Views menu allows users to **Save**, **Share**, and **Manage** (review, select, or delete) their views and those shared with them.

