TRIAL INTERACTIVE

TI CTMS USER GUIDE v1.5

TRANSPERFECT LIFE SCIENCES

Approval Signature: ________________Date: _____________

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Title:

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Title:

VERSION HISTORY

Author	Revision	Date	Change History
Sneha Jagavkar	1.0	21-July-2023	Document Creation

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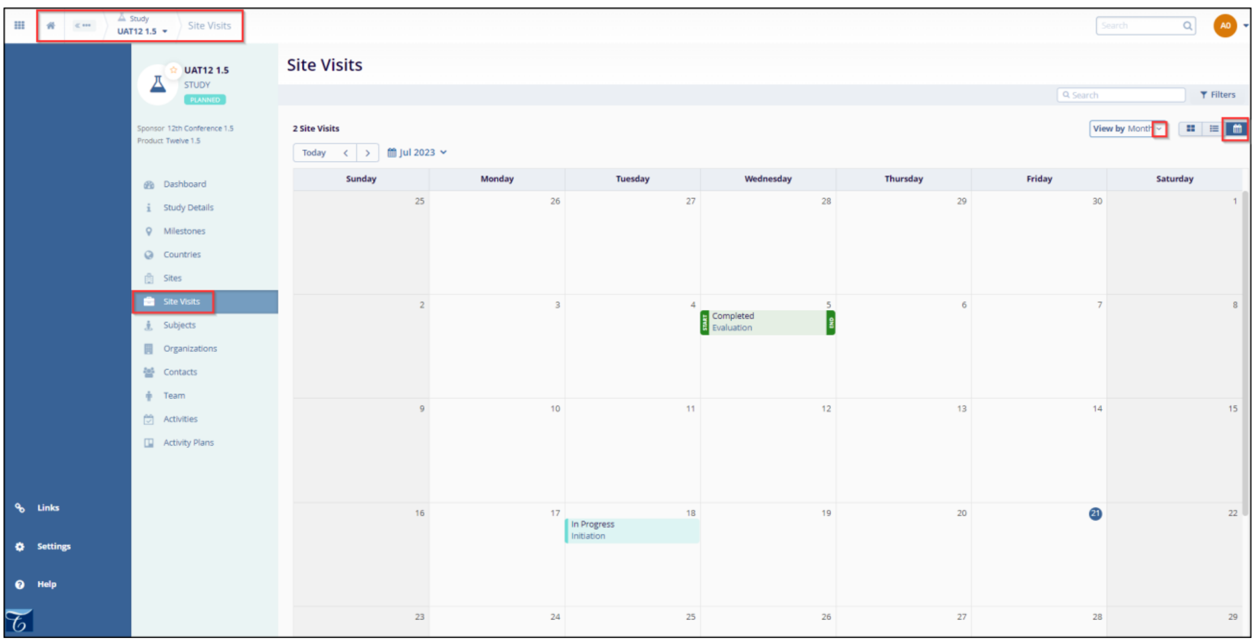
What's New in CTMS v1.5?

User Interface

Calendar View

With the calendar view, the user can see a snapshot of upcoming site visit-related dates. This view provides CRAs and management with a snapshot of site visit-related activities at a glance to help with resource allocation. This functionality includes the following:

- Display upcoming visits, ongoing visits, or completed/missed visits
- Filter by CRA
- Filter by time period
- Ability to look at data by various user-defined time periods
- Exporting for use in resourcing reports



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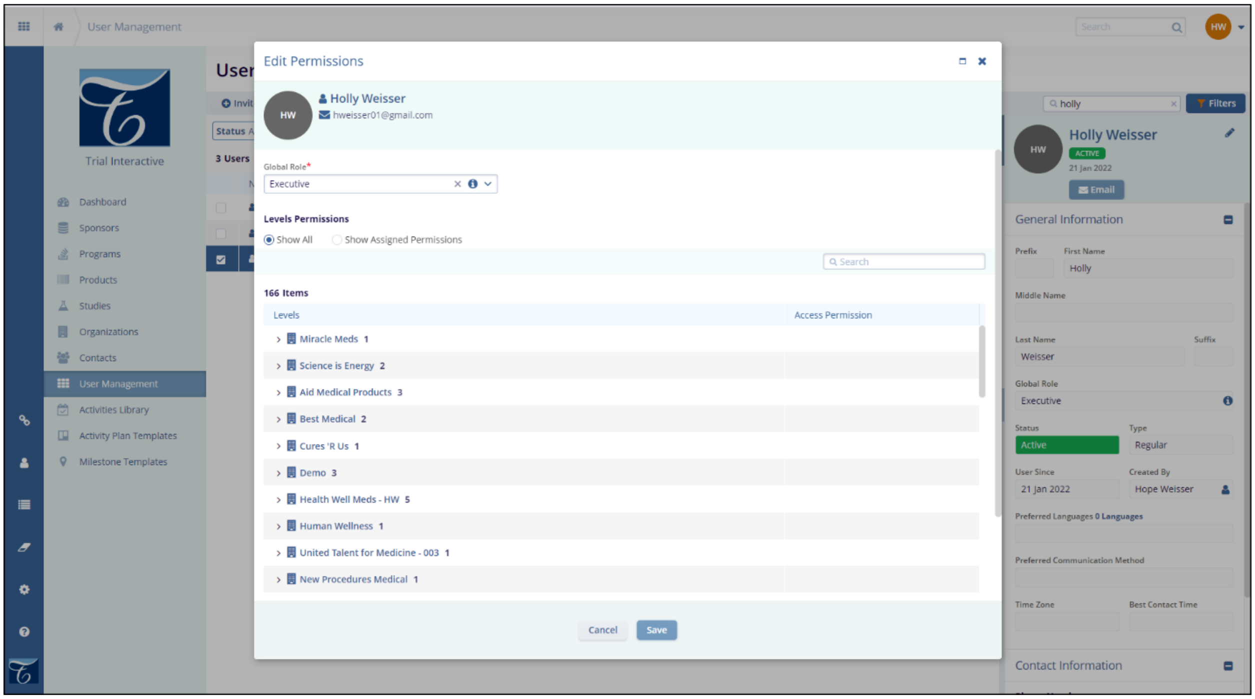
Access Management

CTMS 1.5 introduces an improved, more intuitive user access matrix, clearly stating how the user will be expected to interact with CTMS data for studies, countries, and sites. With regard to Study access, the previous user access terminology is still present but will have the word 'Deprecated' after it to indicate that we have moved on to other terminology such as, in the case of a CRA, 'Site Editor', for example.



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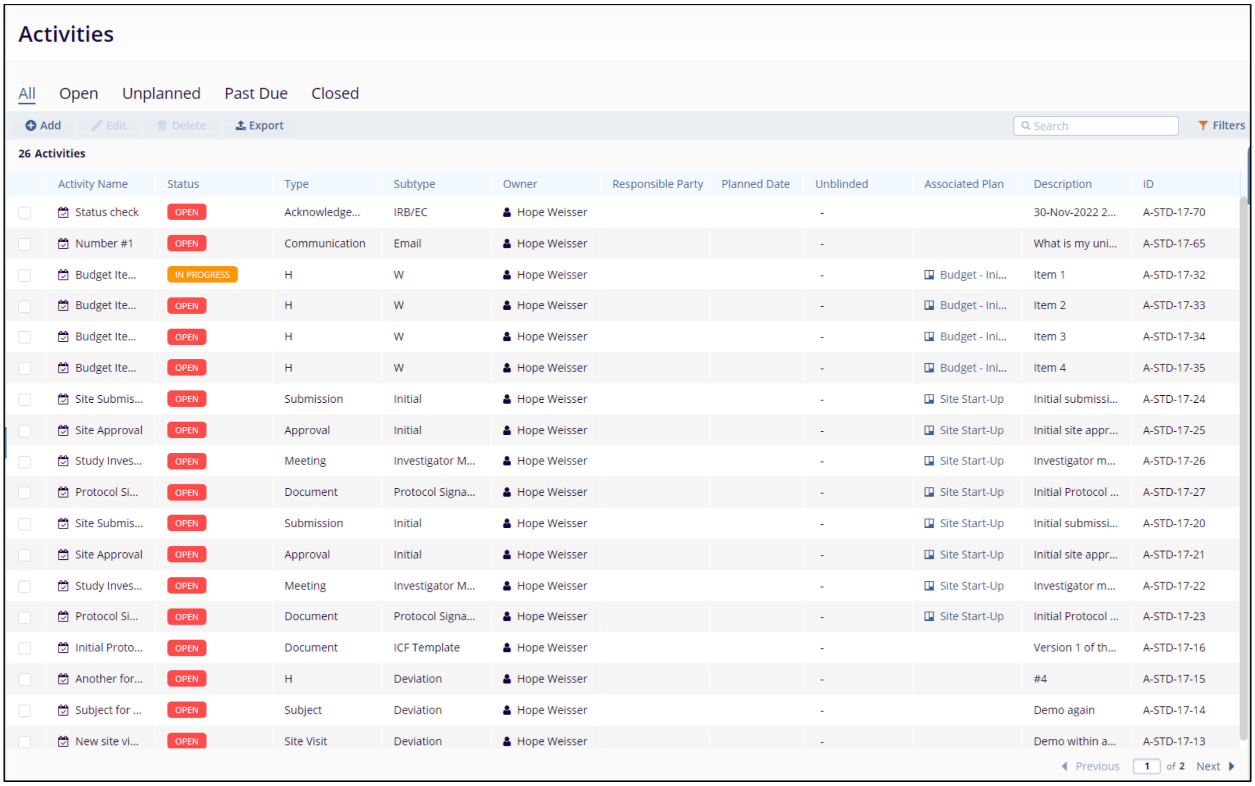
Addition – Roll-up Views

CTMS v1.5 introduces Study Contact roll-up views. This feature consists of the following:

- Study, Country, and Site Level data: CTMS 1.5 provides users within a study the ability to see all site contacts for all sites within a study in a single location at the Study level.
- Cumulative site contact lists can be sorted and used for distribution of study mass communication and may reduce the need for contact report development.



Activities

All | Open | Unplanned | Past Due | Closed

Add | Edit | Delete | Export | Search | Filters

26 Activities

Activity Name	Status	Type	Subtype	Owner	Responsible Party	Planned Date	Unblinded	Associated Plan	Description	ID
Status check	OPEN	Acknowledge...	IRB/EC	Hope Weisser			-		30-Nov-2022 2...	A-STD-17-70
Number #1	OPEN	Communication	Email	Hope Weisser			-		What is my uni...	A-STD-17-65
Budget Ite...	IN PROGRESS	H	W	Hope Weisser			-	Budget - Ini...	Item 1	A-STD-17-32
Budget Ite...	OPEN	H	W	Hope Weisser			-	Budget - Ini...	Item 2	A-STD-17-33
Budget Ite...	OPEN	H	W	Hope Weisser			-	Budget - Ini...	Item 3	A-STD-17-34
Budget Ite...	OPEN	H	W	Hope Weisser			-	Budget - Ini...	Item 4	A-STD-17-35
Site Submis...	OPEN	Submission	Initial	Hope Weisser			-	Site Start-Up	Initial submissi...	A-STD-17-24
Site Approval	OPEN	Approval	Initial	Hope Weisser			-	Site Start-Up	Initial site appr...	A-STD-17-25
Study Inves...	OPEN	Meeting	Investigator M...	Hope Weisser			-	Site Start-Up	Investigator m...	A-STD-17-26
Protocol Si...	OPEN	Document	Protocol Signa...	Hope Weisser			-	Site Start-Up	Initial Protocol ...	A-STD-17-27
Site Submis...	OPEN	Submission	Initial	Hope Weisser			-	Site Start-Up	Initial submissi...	A-STD-17-20
Site Approval	OPEN	Approval	Initial	Hope Weisser			-	Site Start-Up	Initial site appr...	A-STD-17-21
Study Inves...	OPEN	Meeting	Investigator M...	Hope Weisser			-	Site Start-Up	Investigator m...	A-STD-17-22
Protocol Si...	OPEN	Document	Protocol Signa...	Hope Weisser			-	Site Start-Up	Initial Protocol ...	A-STD-17-23
Initial Proto...	OPEN	Document	ICF Template	Hope Weisser			-		Version 1 of th...	A-STD-17-16
Another for...	OPEN	H	Deviation	Hope Weisser			-		#4	A-STD-17-15
Subject for ...	OPEN	Subject	Deviation	Hope Weisser			-		Demo again	A-STD-17-14
New site vi...	OPEN	Site Visit	Deviation	Hope Weisser			-		Demo within a...	A-STD-17-13

Previous 1 of 2 Next

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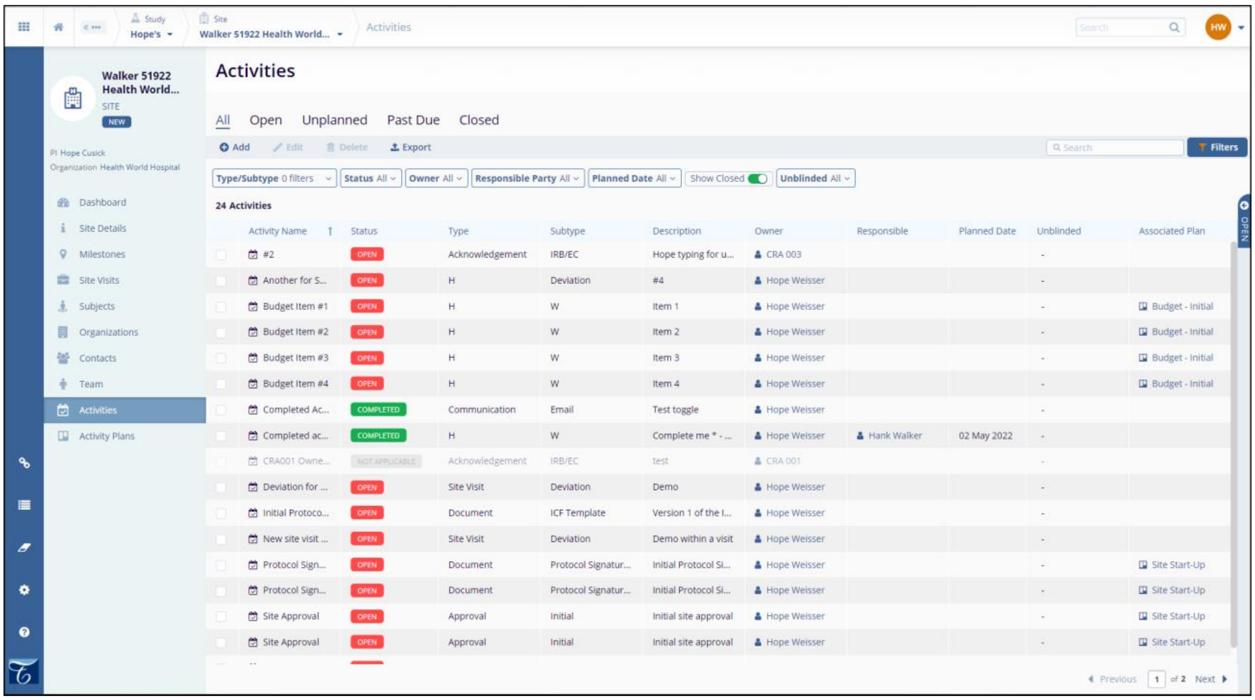
Customized Activity Grid and Saving Customized Views

Users have the ability to do the following:

- Select which data is displayed in the grid view.
- Choose how the selected data should be filtered to ensure relevant data is always displayed to the user when completing tasks associated to key business processes.
- Identify which entity-level data should be displayed.



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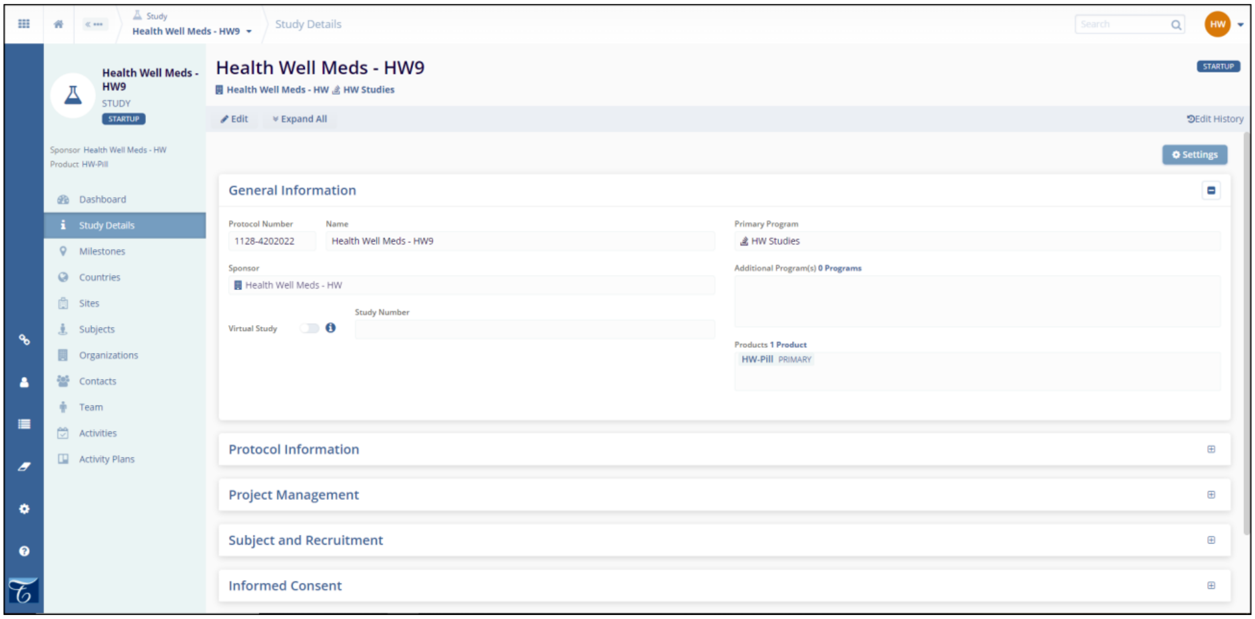
Co-Sponsored Studies

CTMS v1.5 provides the ability to identify when a study is utilizing a co-sponsorship and to associate more than one sponsor with the study. This feature allows a more accurate depiction of study sponsorship.



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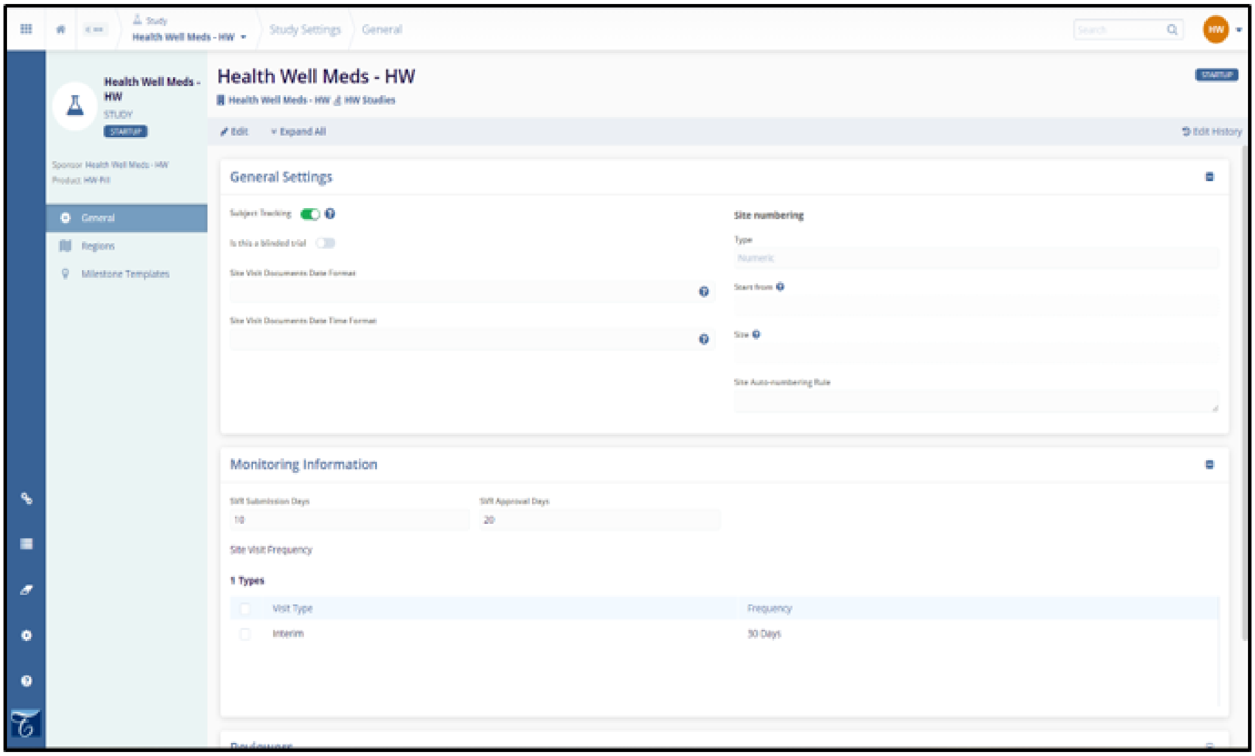
Study Specific Settings

CTMS v1.5 makes clear to the user when the system/domain level settings are being utilized or study defined settings are in use. This improvement ensures the study managers are always aware of what data is available to users within their study and impact on the available data within the study if changing study specific settings are interacted with. Enhancing the over all user experience and reducing user confusion.



Follow the steps below to navigate to the General Settings of the Studies.

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
   a. This opens the “Studies” window and study list is displayed.
2. Click on the name of the study to which you want to add partner information.
   a. The dashboard for the study is displayed.
3. Click on the **Study Details** in the Navigation menu at the left side of the screen.
   a. The “Study Details” window is displayed.
4. Click on the **Settings** button displayed in the top right corner.
   a. This opens the ‘Study Settings – General’ window.
5. Expand the General settings window by clicking the + icon on the right side of the screen.

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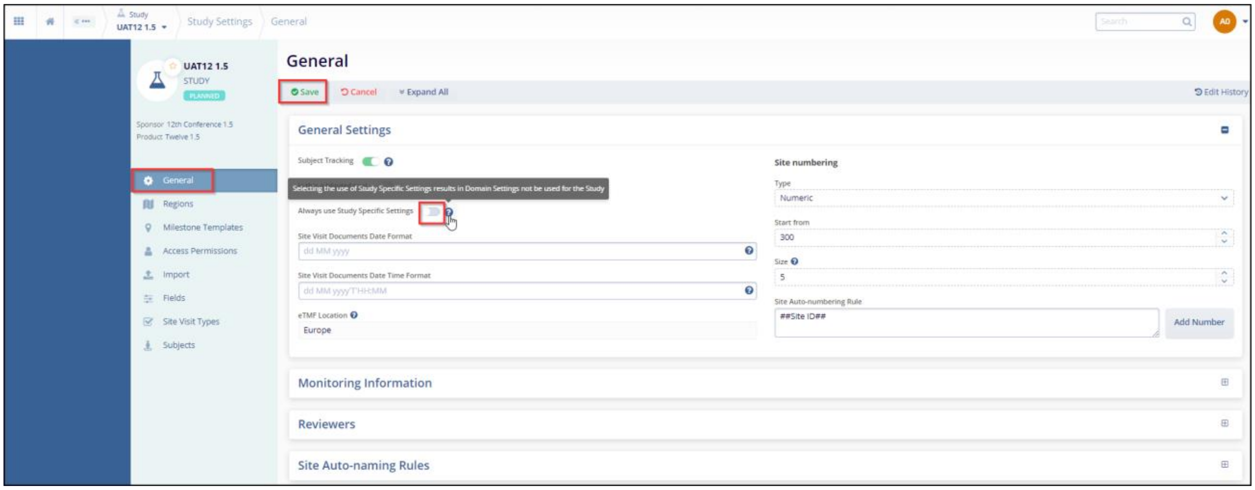
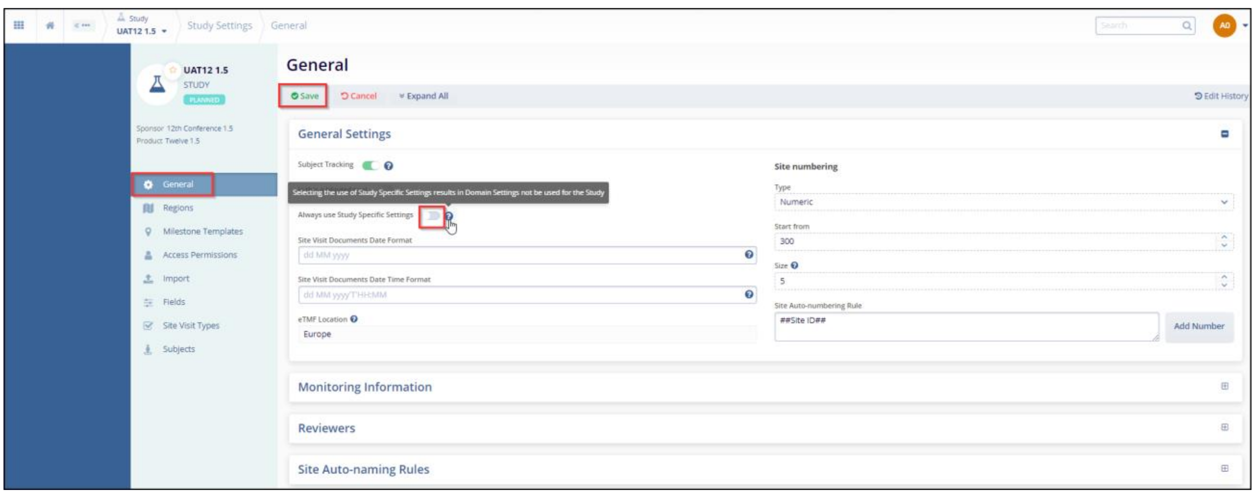
6. Click the **Edit** button displayed on the top left corner.



7. Click the **Always use Study Specific Settings** toggle button.
8. Hover the mouse over the **?** icon to view the tooltip.



9. Selecting this toggle button helps the user to not add any custom fields.

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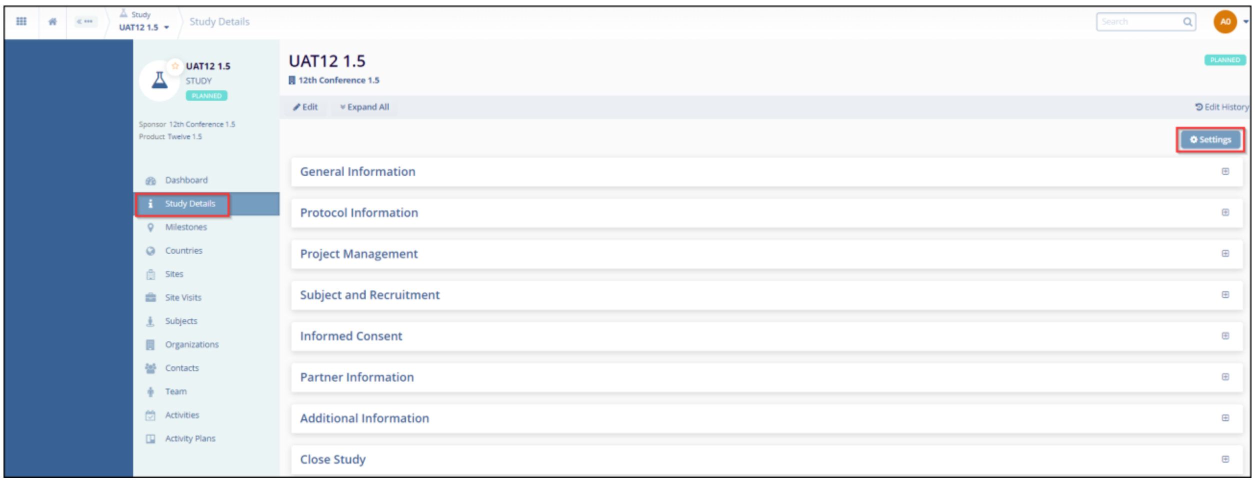
Fields

Follow the steps below to apply study specific settings for – **Milestones, Sites, Studies, Countries, Subjects, Subject Visits,** and **Team Members**.

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
    a. This opens the “Studies” window and study list is displayed.
2. Click on the name of the study to which you want to add partner information.
    a. The dashboard for the study is displayed.
3. Click on the **Study Details** in the Navigation menu at the left side of the screen.
    a. The “Study Details” window is displayed.
4. Click on the **Settings** button displayed in the top right corner.
    a. This opens the ‘Study Settings – General’ window.



5. The left side navigation menu displays new added fields – **Fields, Site Visit Types** and **Subjects**.

6. Click the **Fields** link.
    a. This opens the ‘Study Settings – Fields’ window.
7. Click on the Milestones link from the center of the window.
    a. This opens the Study Settings – Fields – Milestones window.

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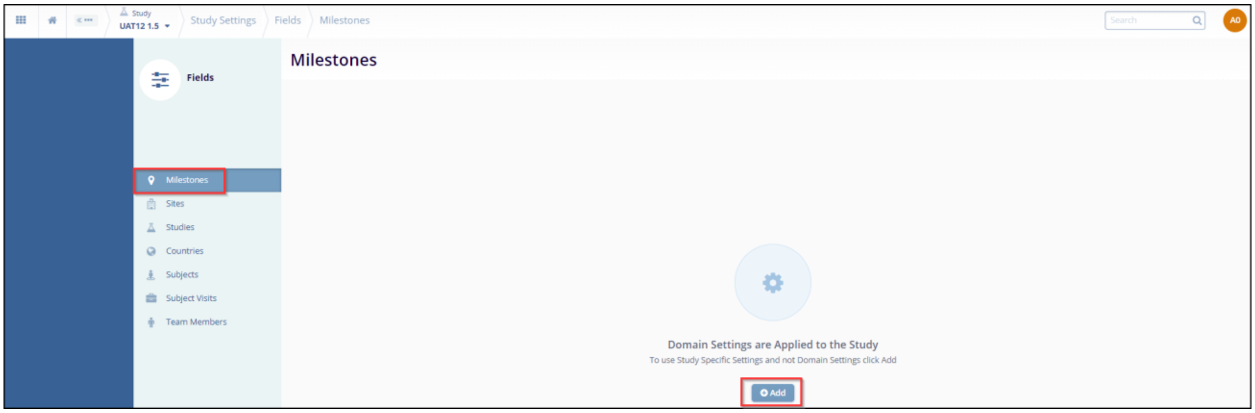
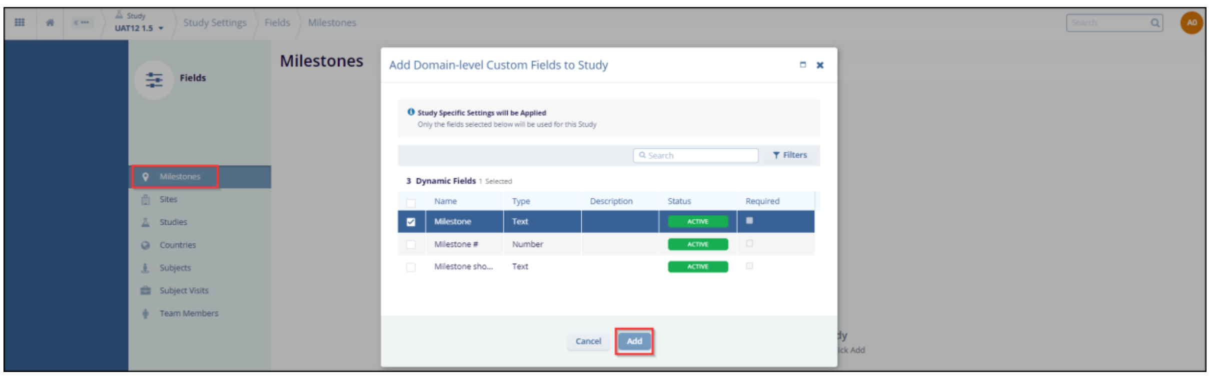
8. Click the **Add** button displayed in the center of the page to apply domain settings to the study.

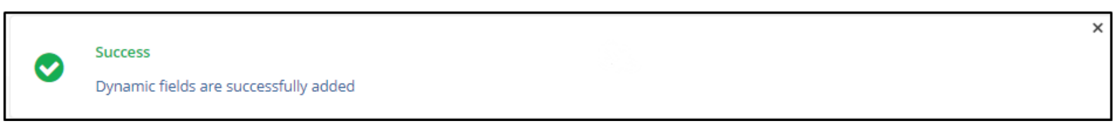


a. This opens the Add Domain-level Custom Fields to Study window.

9. Select the checkbox(s) before the Name field and click **Add** button.



10. A notification of Success is displayed in the top right corner of the screen.



11. The dynamic added field is displayed with the status in the center of the screen and 'Study Specific Settings are Applied' is displayed in the top right corner of the screen.

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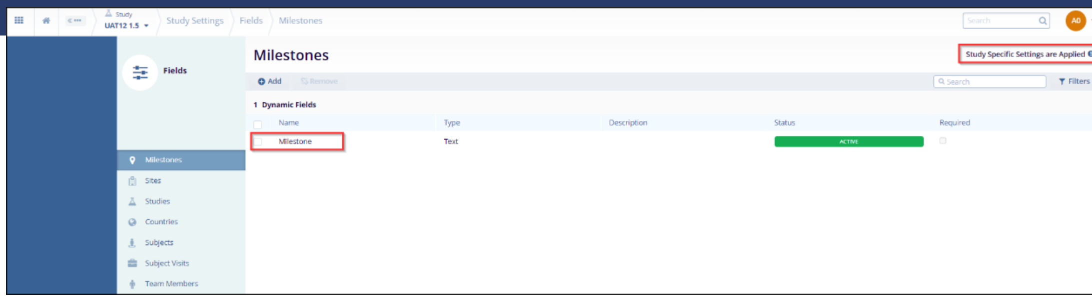


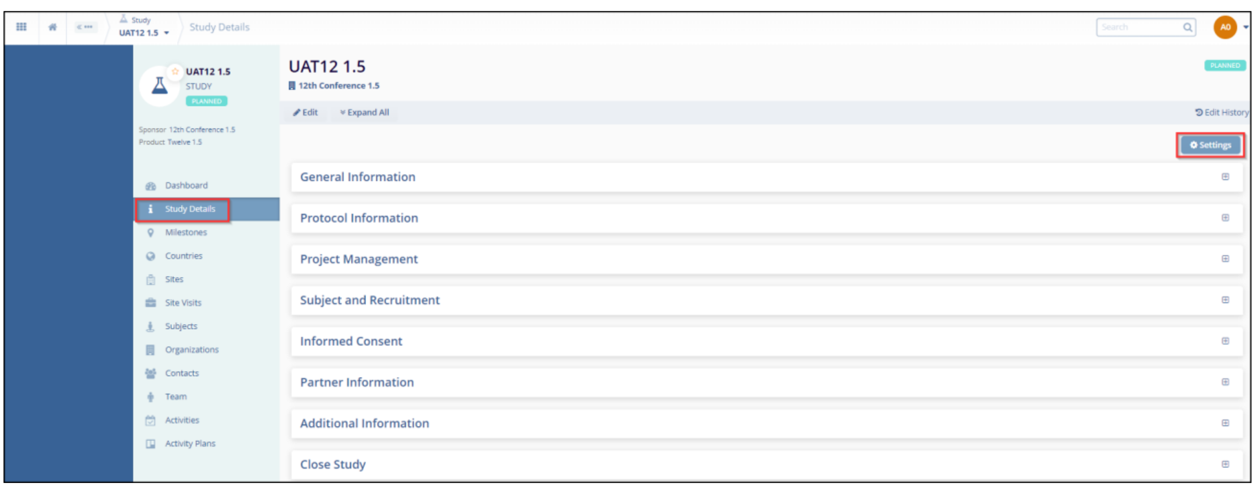
12. Select the checkbox of the added dynamic filed.
13. This enables the Remove button. Click the **Remove** button to delete the dynamic field.

Note: Likewise, the user can apply Domain Settings applied to Study for Sites, Studies, Countries, Subjects, Subject Visits, and Team Memebers. Follow the above steps to add dynamic fields.

Site Visit Types

With this the user can apply the Domain Settings to study by - adding site visit type and creating new site visit type. Follow the steps below to apply domain settings to the study.

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
   a. This opens the "Studies" window and study list is displayed.
2. Click on the name of the study to which you want to add partner information.
   a. The dashboard for the study is displayed.
3. Click on the **Study Details** in the Navigation menu at the left side of the screen.
   a. The "Study Details" window is displayed.
4. Click on the **Settings** button displayed in the top right corner.
   a. This opens the 'Study Settings – General' window.



5. Click the **Site Visit Types** option in the navigation menu at the left side of the screen.
   a. This opens the 'Study Settings – Site Visit Types' window.

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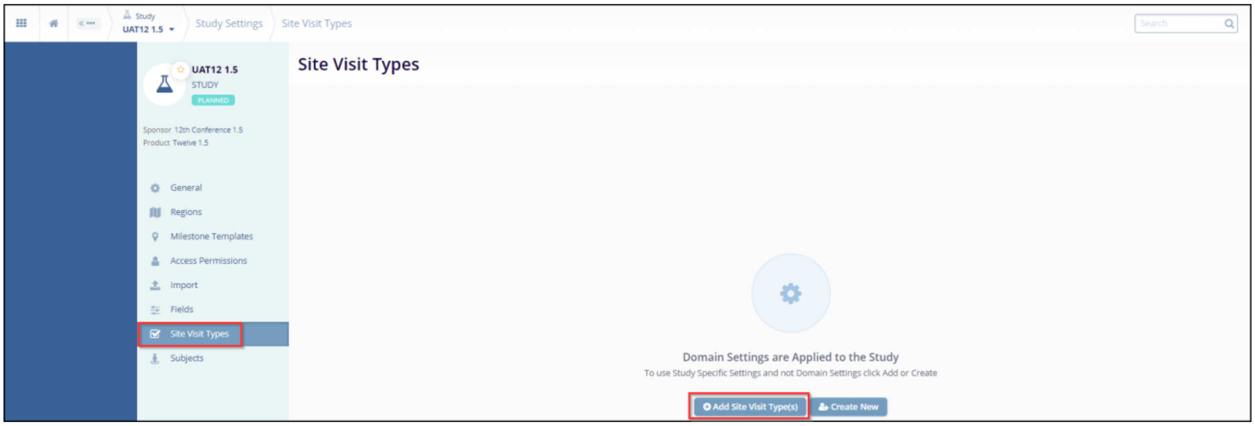
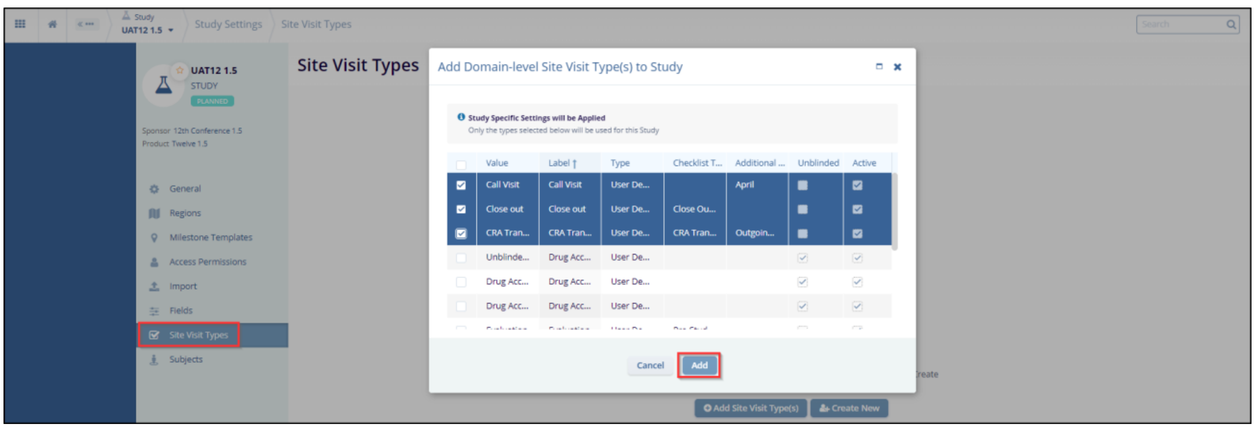
6. Click the **Add Site Visit Type(s)** button.
   a. This opens the ‘Add Domain-level Site Visit Type(s) to Study window.



7. Select a checkbox(s) before the value column and click **Add** button.



8. A notification of Success is displayed in the top right corner of the screen.
9. The dynamic added field is displayed in the center of the screen and ‘Study Specific Settings are Applied’ is displayed in the top right corner of the screen.

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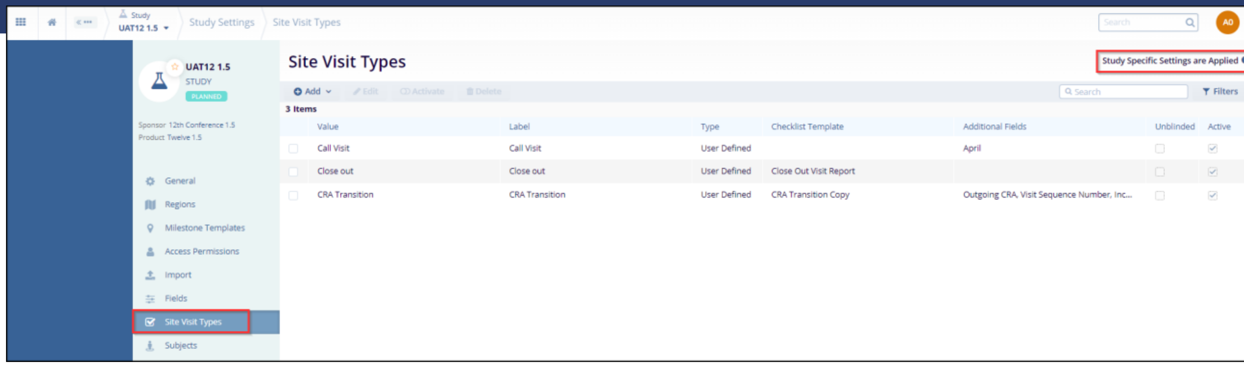
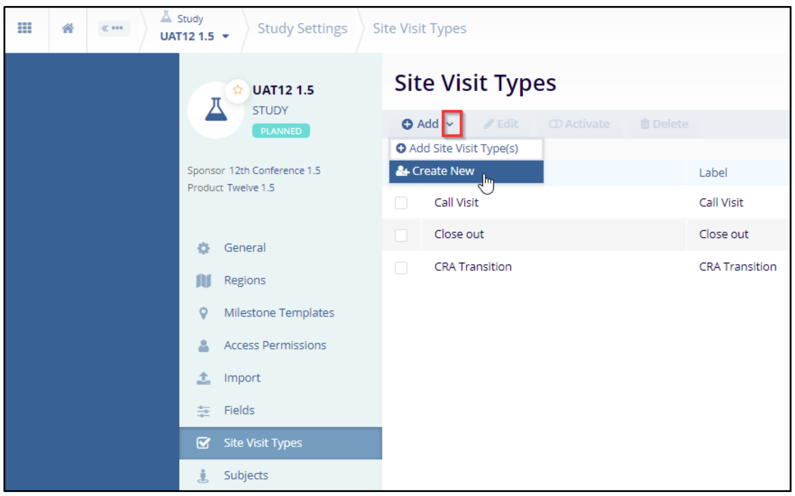


10. Notice that the ‘Create New button’ is disappeared and is now displayed below the ‘+ Add’ dropdown menu.
11. Click the **Create New** option from the +Add Dropdown menu.



a. This opens the ‘Create Site Visit Type’ window.

12. Enter a name in the Value field as indicated by an asterisk (*).
13. Notice that the Label field displays the same name mentioned in the value field.
14. (Optional) Select the toggle button of **Unblinded Site Visit Type**.
15. (Optional) Select the **Checklist Template** from the dropdown menu. The user can select 1 or all templates from the dropdown menu.
16. Click **Create**.

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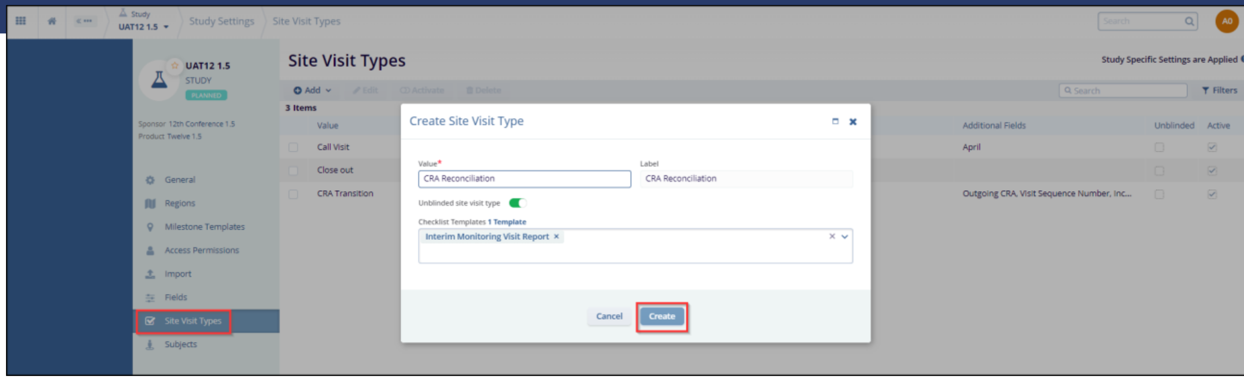
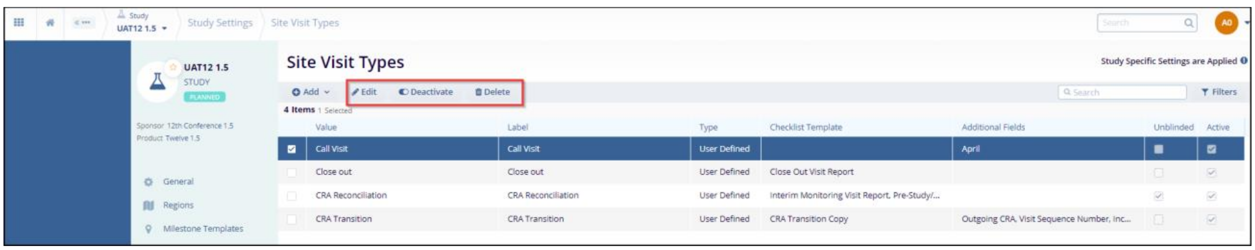


17. The newly added site visit type is displayed in the grid.
18. The user has the ability to Add, Edit, Activate and Delete the Site Visit Types.
19. Click on the checkbox of the site to enable the – Edit, Deactivate (toggle button) and Delete the site visit type.



20. Perform the required action.

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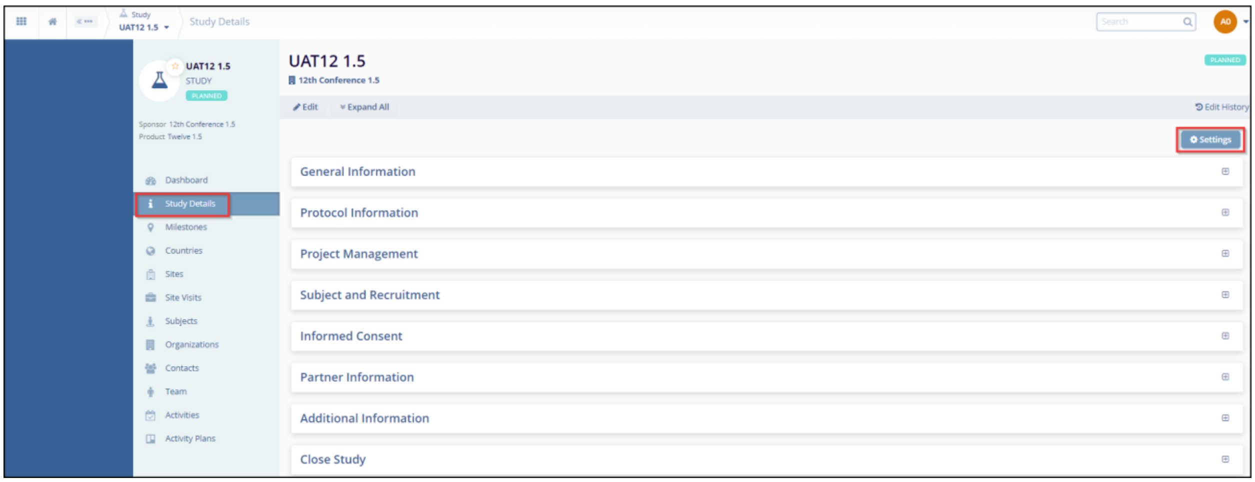
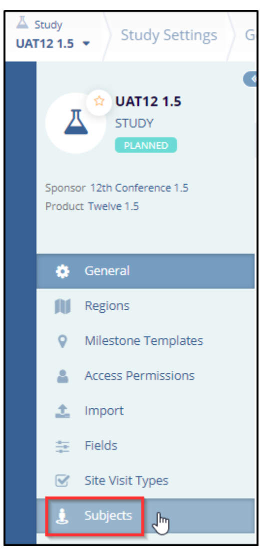
Subjects

With this the user can apply the Domain Settings to study by - adding Subject Statuses, Enrollment Tracking and Subject Visit Types. Follow the steps below to apply domain settings to the study.

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
   a. This opens the “Studies” window and study list is displayed.
2. Click on the name of the study to which you want to add partner information.
   a. The dashboard for the study is displayed.
3. Click on the **Study Details** in the Navigation menu at the left side of the screen.
   a. The “Study Details” window is displayed.
4. Click on the **Settings** button displayed in the top right corner.
   a. This opens the ‘Study Settings – General’ window.



5. Click the **Subjects** option in the navigation menu at the left side of the screen.



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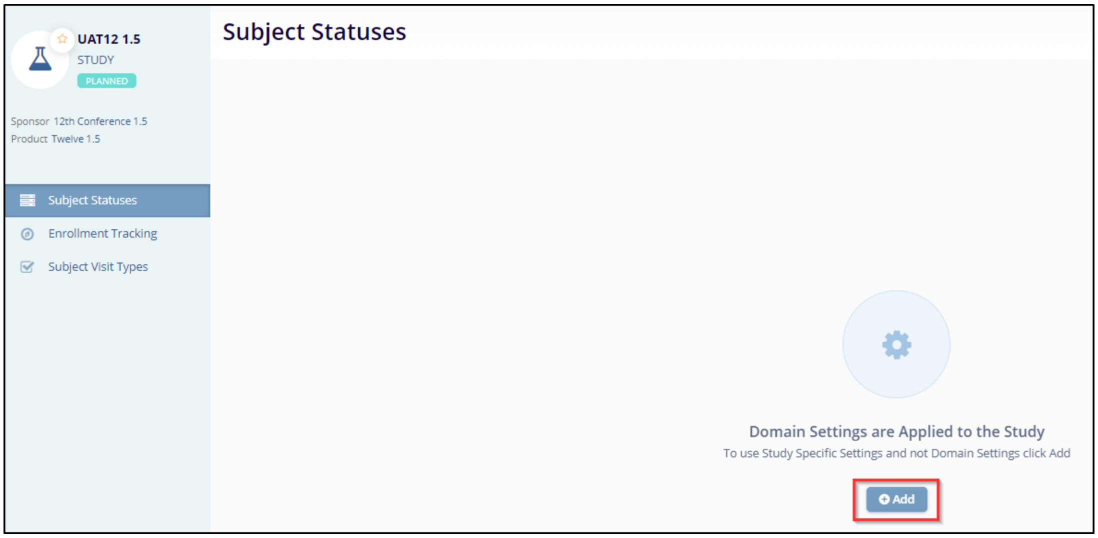
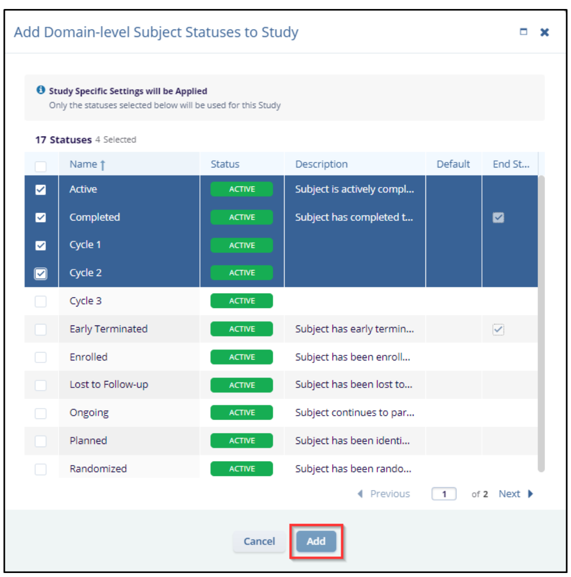
a. This opens the 'Subjects – Subject Statuses' window.

6. Click the **Add** button displayed in the center of the screen.



a. This opens the Add Domain-level Subject Statuses to Study window.

7. Select a checkbox(s) before the value column and click **Add** button.



8. A notification of Success is displayed in the top right corner of the screen.
9. The dynamic added field is displayed in the center of the screen and 'Study Specific Settings are Applied' is displayed in the top right corner of the screen.

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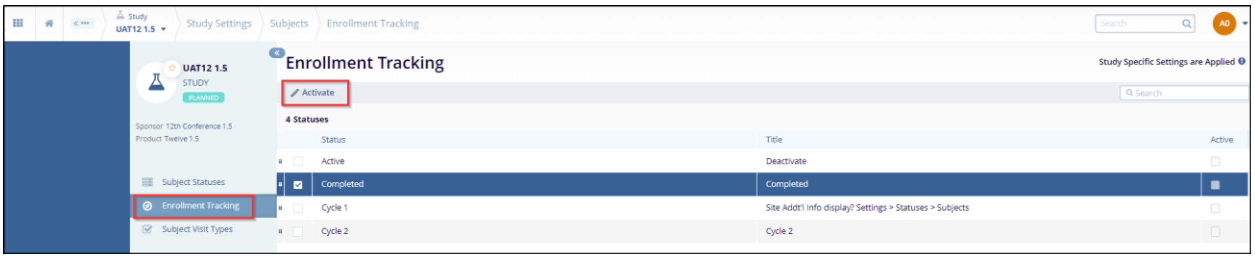
10. Click on the Enrollement Tracking link in the left navigation menu.
    a. This opens the ‘Subjects – Enrollement Tracking’ window.
11. Notice that the newly added subject statuses are displayed in the grid.
12. Here, the user can only select a status by clicking the checkbox and either ‘Activate’ or ‘Deactivate’ a status.



13. Click the **Subject Visit Types** option in the left navigation menu.
14. Follow these steps to add the Domin-level Subject Visit Type(s) to Study.

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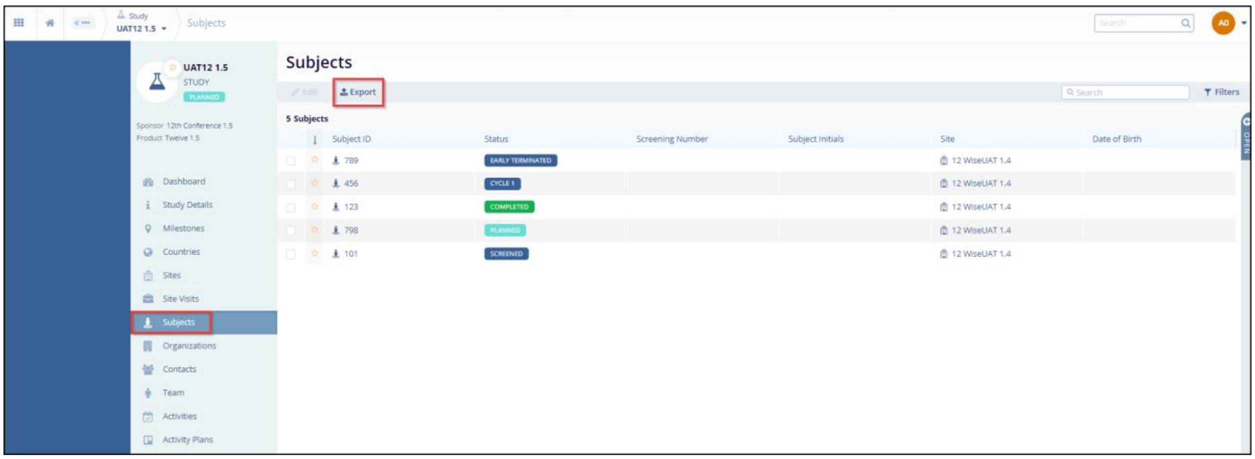
Customized Data Export

With this improvement CTMS allows users to customize exports to include or exclude specific data.

- To improve the users export experience CTMS has removed the use of labels for lookup values, site visit types, and custom fields dropdown values.
- Users can expand the available data set that is included within their export. For example, alongwith the record status and status date, the user can include the status notes for the status.



With the export functionality, CTMS provides users with the ability to define data relevance based on immediate business needs. Once the user has determined what is relevant to their needs, they can export that data set and share it with non-CTMS user team members for collaboration and review.

CTMS data exports can also be utilized for data imports into an external system, reducing the need for duplicate data entry into other systems and ensuring data quality. This functionality is applicable to the following fields:

- Dashboard – for each dashlet separately
- Sponsors
- Programs
- Products
- Studies
- Organizations and
- Contacts

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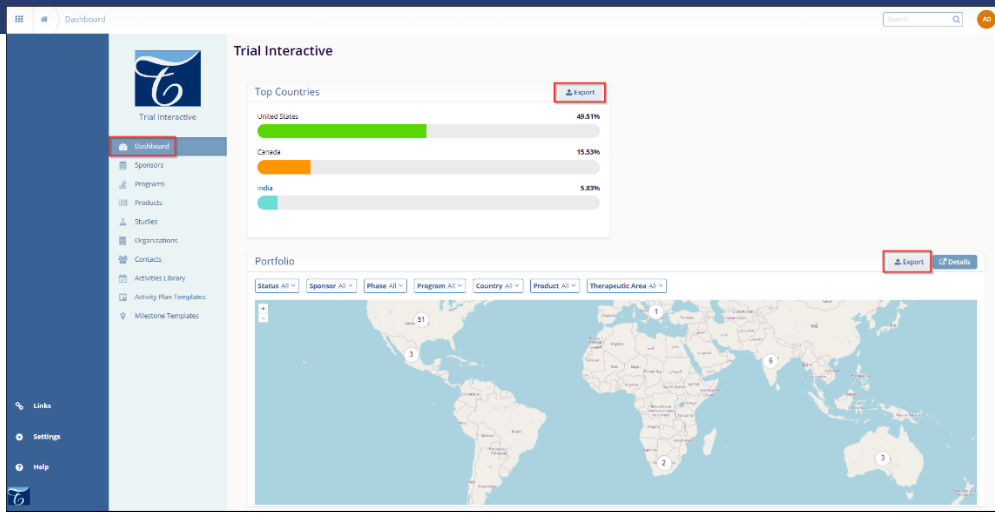

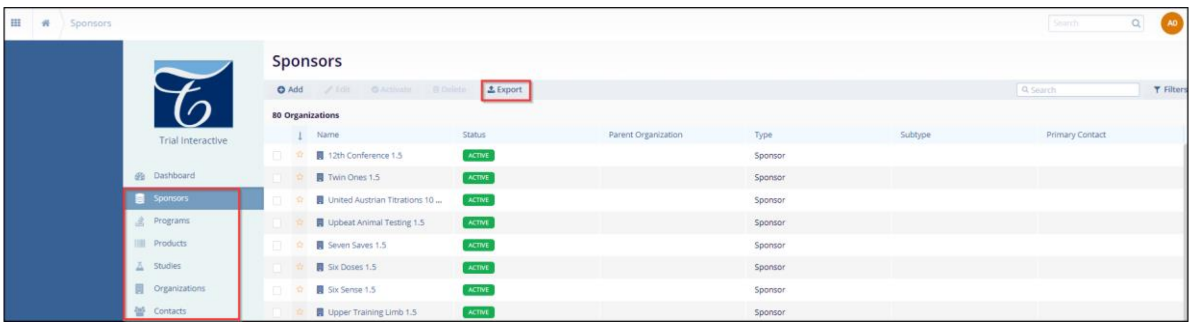

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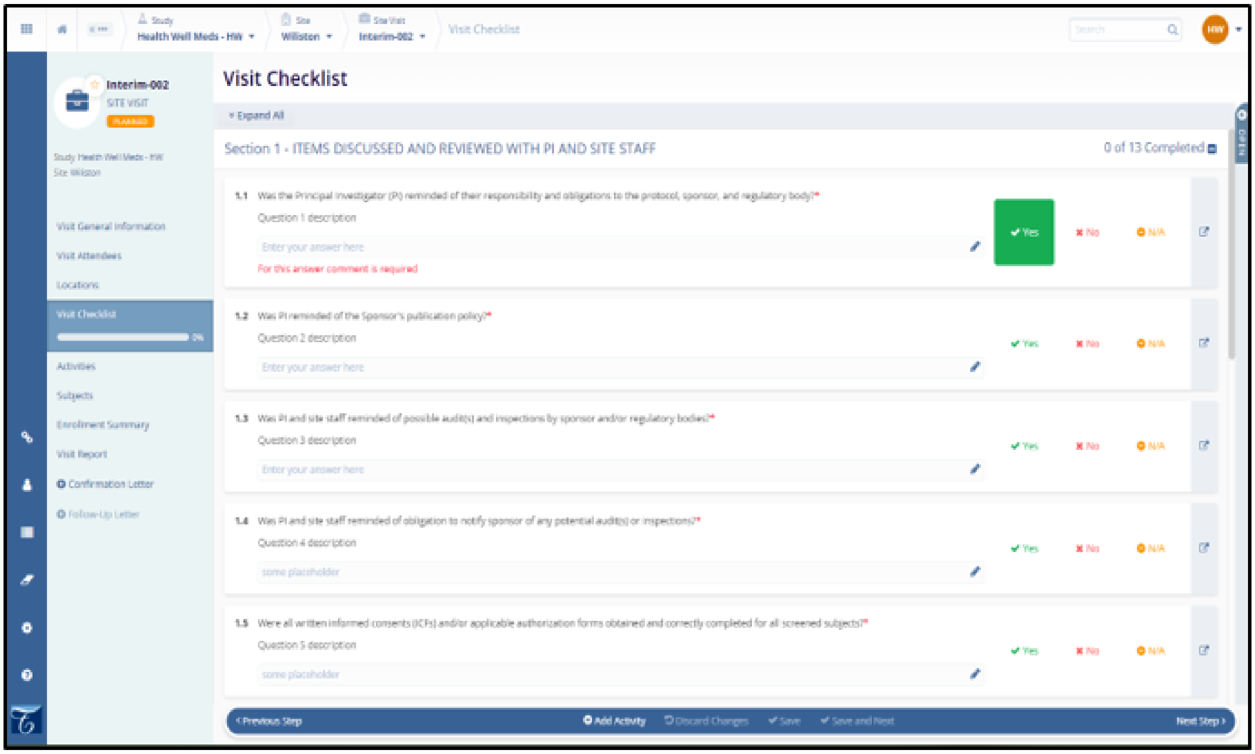
Auto-Saving Answers for Site Visit Checklists

With CTMS 1.5, when a user is filling out a site visit checklist, their answers will automatically save when they move on to another question. The screen will refresh between questions and the visit checklist progress bar will be updated to display the user's current progress toward completion.



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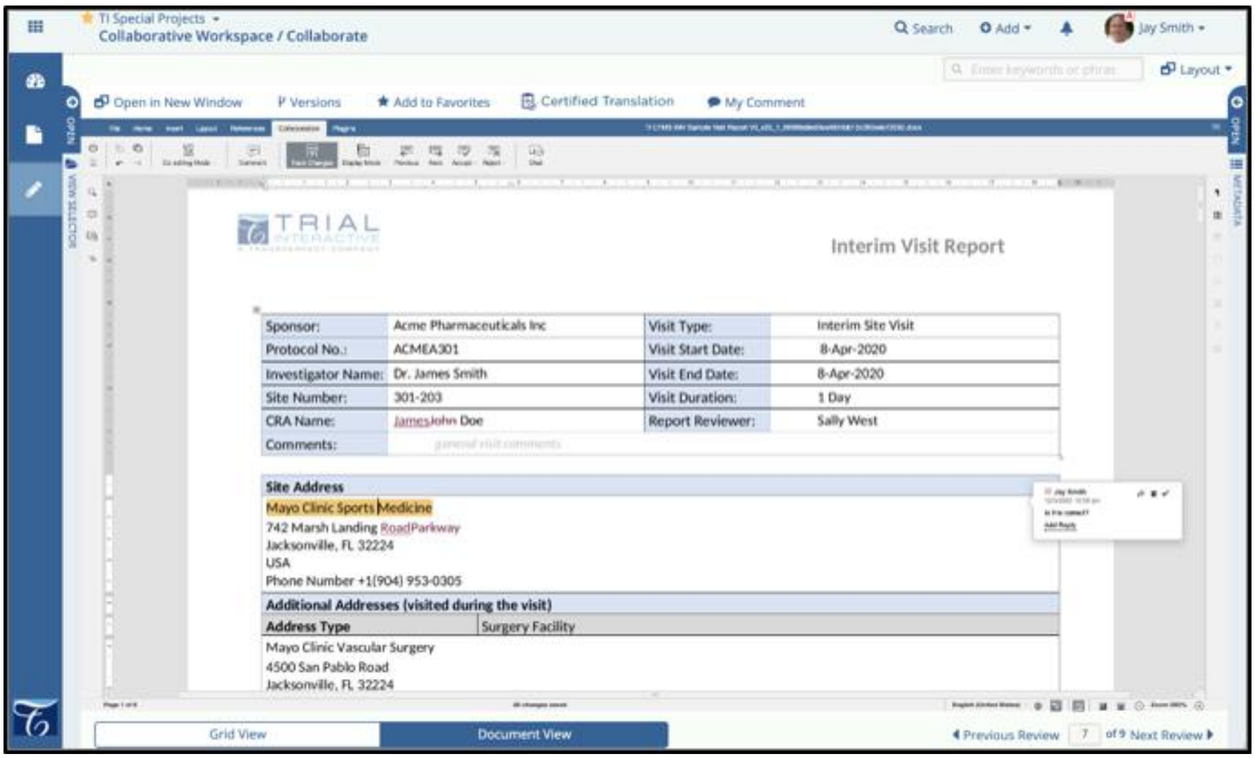
Unblinded Visit Type Naming Requirements

With this improvement, users can now indicate that a visit type is unblinded without the necessity of having 'unblinded' appear in the name of the vist type.

CTMS ensures all unblinded content is restricted to unblinded team members –

- Site Visits,
- Site Visit Reports,
- Visit Report Content (responses),
- Subject related comments, and
- Unblinded activities/actions.



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Favorites

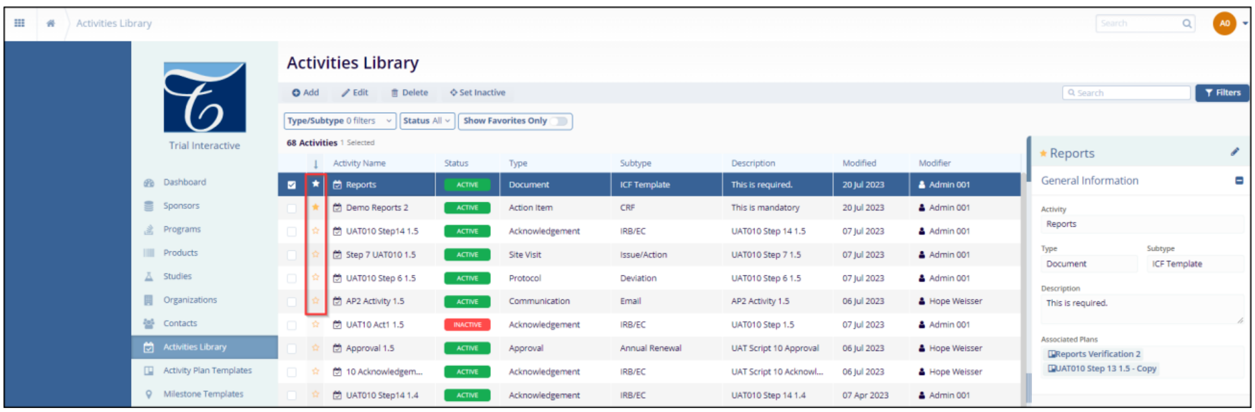
CTMS has the ability for a user to denote a record as a favorite. Users now have the ability to define a record as a personal favorite within the CTMS or via myTI, and have the indication displayed within both applications.

The ability to designate a record as a favorite provides users with the ability to quickly locate items within lists without having to create specific “filtered” views. Favorites can be used when sorting lists to reduce the number of relevant records displayed.

The user can select the following fields as favorites:

- Sponsors
- Programs
- Products
- Studies
- Organizations
- Contacts and
- Activities Library

Click the **star** icon to turn it yellow. The selected field is added to favorites with a notification displayed in the top right corner. Refer to the screenshots below.



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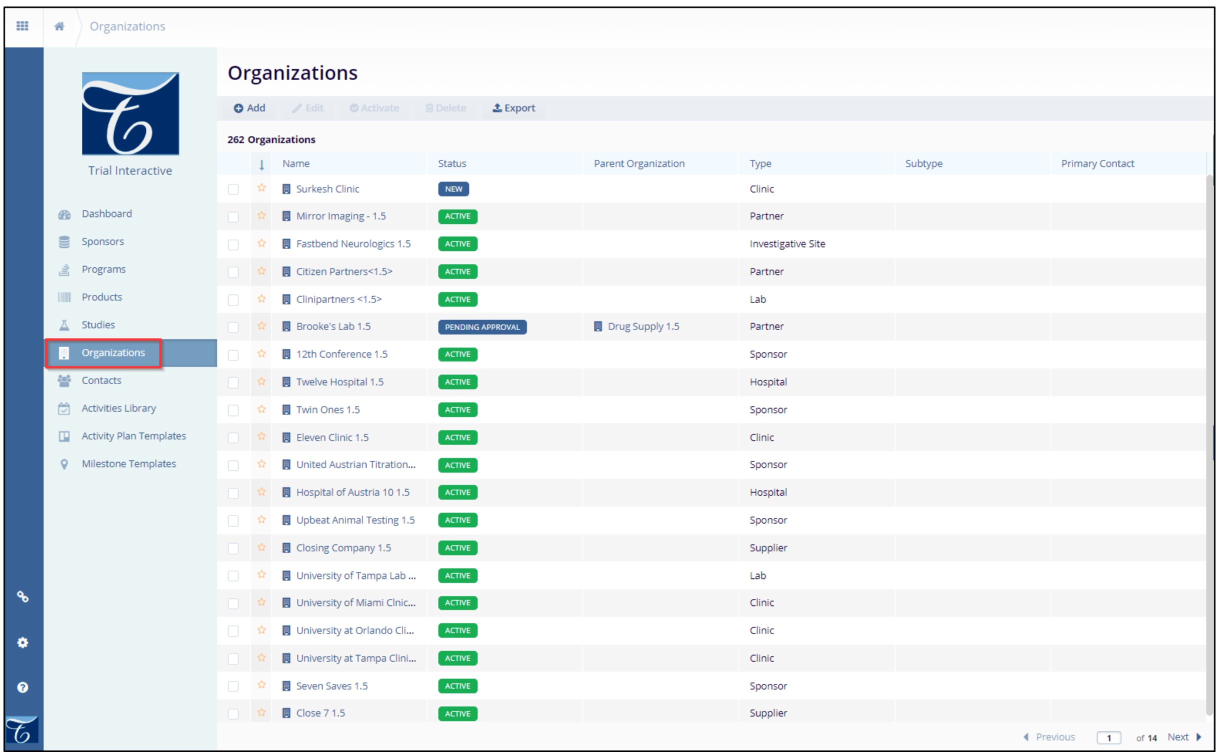
Organizations

Pre-requisites

Company administrators will need to assign CREATE, UPDATE, EDIT and DELETE permissions/privileges to users' accounts so that they can perform these steps.

Creating an Organization

1. Click on the organization link in the Navigation Menu in the panel at the left side of the screen.
   a. This opens the "Organization" window, and all the organizations at the domain level are displayed.



2. Click the **Add** button at the top-left of the screen.
   a. This opens the "Create Organization" window.
3. Here we need to enter the mandatory metadata to create an organization i.e., **Name, Type** and **Status** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
4. If any of the required fields are missing, an error will appear when we click on the **Create** button displaying the fields which need to be filled to create an organization successfully.

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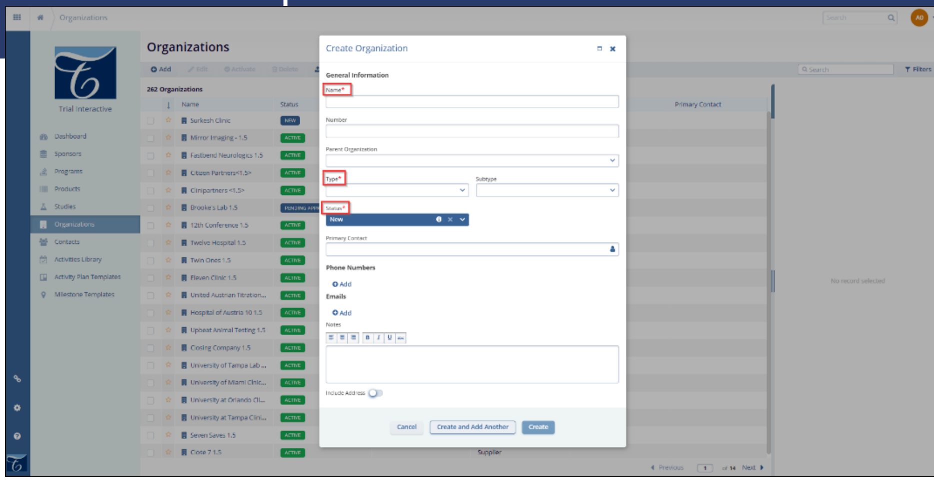
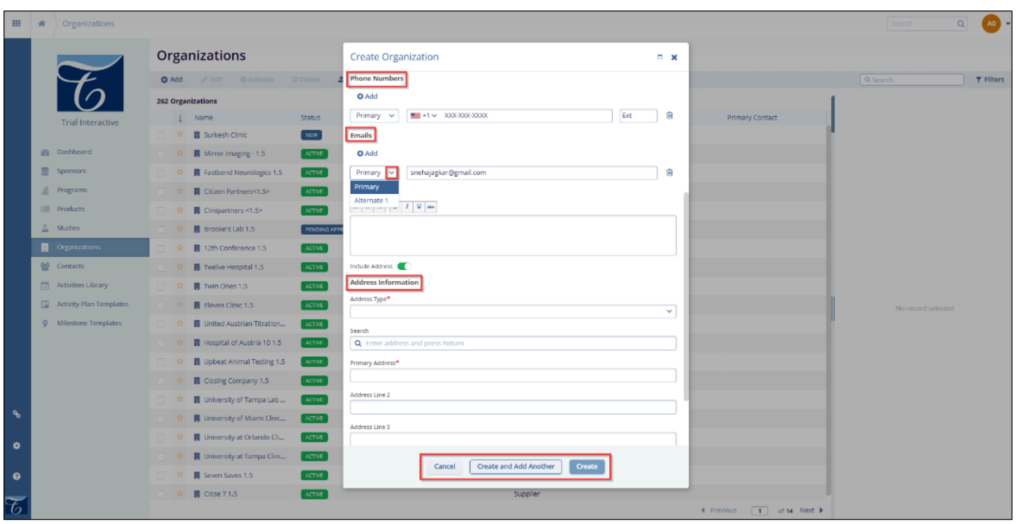


5. **(Optional)** Click on the **Add** symbol below **Phone Number** to add a contact number to that organization.
   Note: When creating an organization record with at least one phone number, you will need to designate one phone number as the primary number.
6. **(Optional)** Click the **Add** symbol to below Emails to add an email address.
   a. Select the email address as eiter Primary or Alternate 1 from the dropdown.
   b. Manually enter the email address in the blank filed.
   c. Click the **bin** icon to delete the email address.
7. **(Optional)** Click **Include Address**, select a type for the address, and enter the address information.
   Note: The Search functionality can be utilized to search for addresses.
8. Finally, before clicking Create, verify all the fields are entered correctly in the Create Organization window.
9. Click **Create** or **Select and Add Another** depending on whether you intend to create another organization right away.



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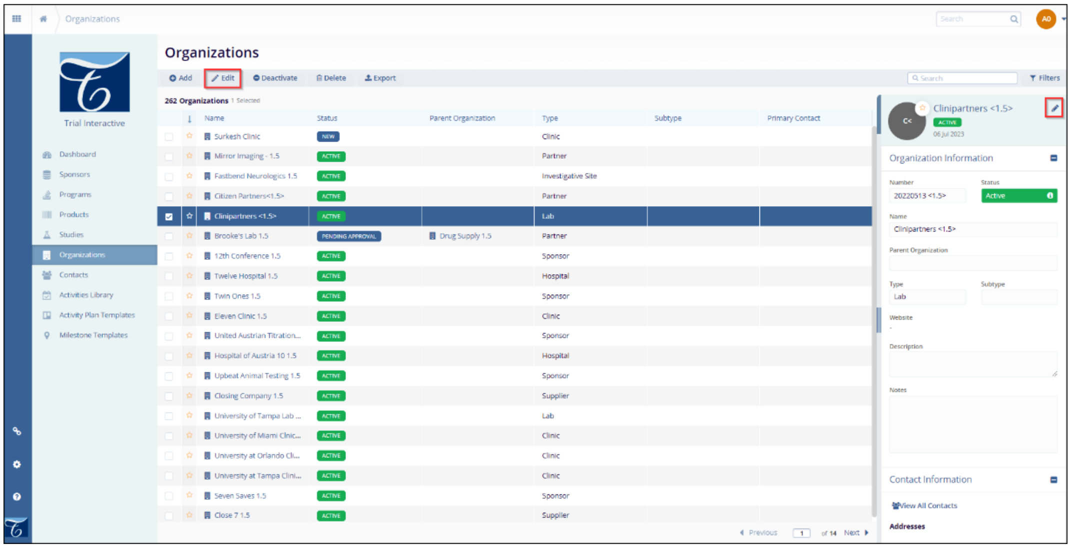
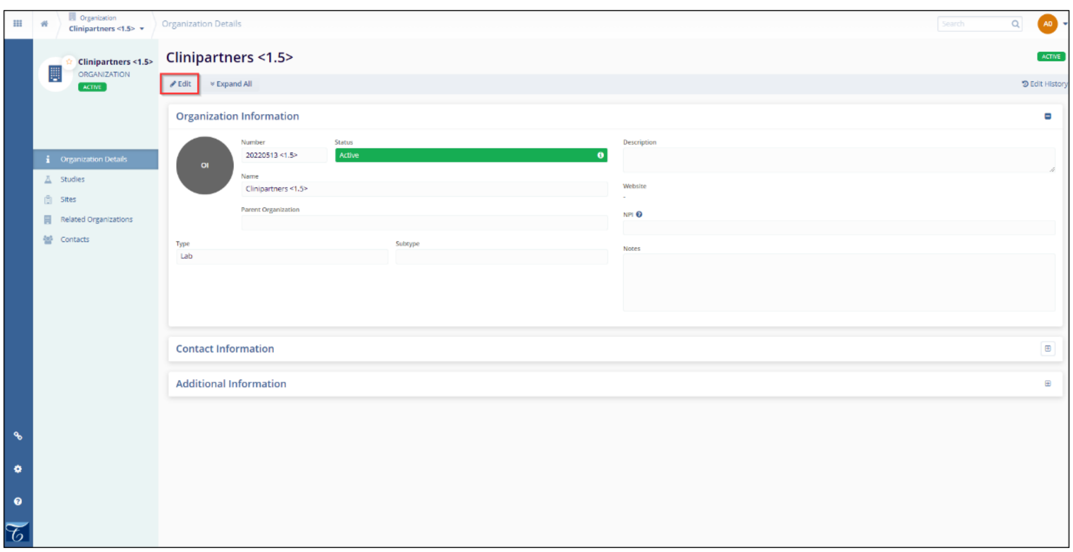
Editing an Organization

1. Click on the **Organizations** link in the Navigation Menu in the panel at the left side of the screen.
   a. This opens the “Organization” window.
2. Click on the checkbox next to the organization name.
   a. A quick-view panel will display on the right side of the screen.
3. Now, click on the **Edit** button (pencil icon).
4. Make any necessary changes.
5. Click on the **Save** button to apply the changes.



6. **(Optional)** Clicking on the organization name will open the “Organization Details” page. Editing an organization may also be done on the organization details page.



Associating an Address to an Organization

1. Click on the **Organizations** link in the Navigation Menu in the panel at the left side of the screen.
   a. This opens the “Organization” window.

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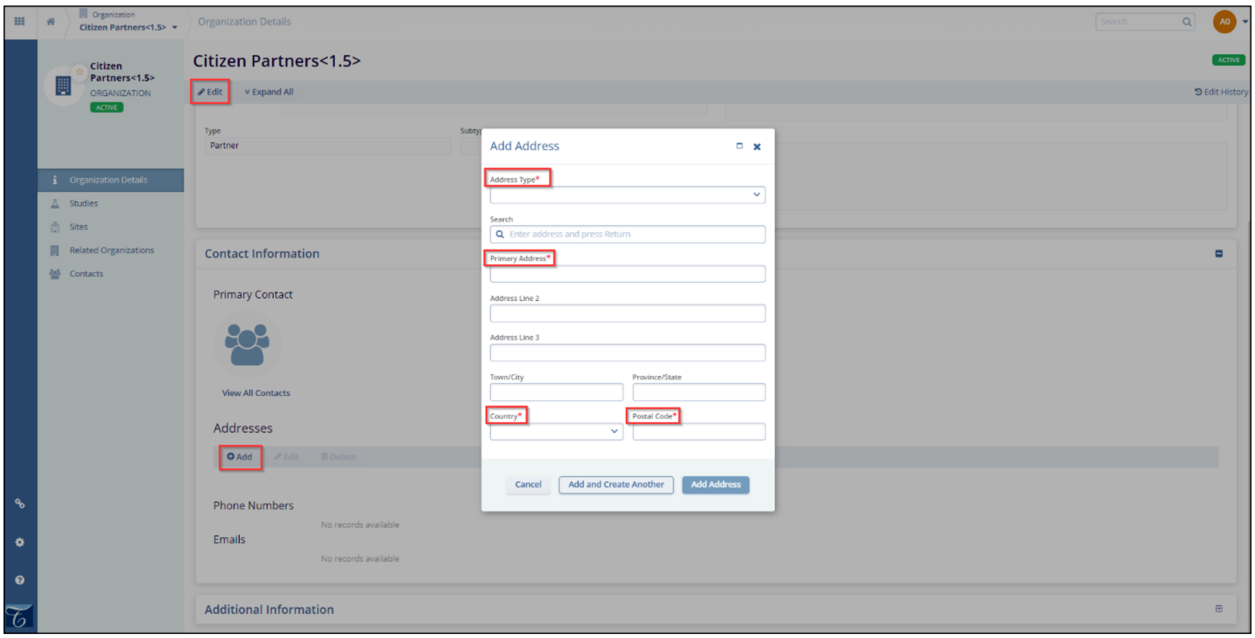
2. Locate the organization to which you want to associate an address and click on the organization's name.
   a. This opens "Organization Details" window.
3. Click the **Edit** button in the Organization window.
4. Click on the **[+]** icon next to **Contact Information** to expand that section.
5. Click on the **Add** button in the **Addresses** section.
   a. This opens the "Add Address" window.
6. Here we need to enter the mandatory metadata to create an address i.e., **Address Type, Primary Address, Country,** and **Postal Code** which have an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.

   Note: The Search functionality can be utilized to search for addresses.

7. If any of the required fields are missing, an error will appear when we click on the **Add Address** button displaying the fields which need to be filled to create an address successfully.



8. (Optional) Click **Add and Create Another** if you intend to create another address right away.

Associating an Organization to a Parent Organization

1. Click on the **Organizations** link in the Navigation Menu in the panel at the left side of the screen.
   a. This opens the "Organization" window.
2. Click on the **Name** for any non-sponsor organization record from the list displayed.
   a. This opens the "Organization Details" window.

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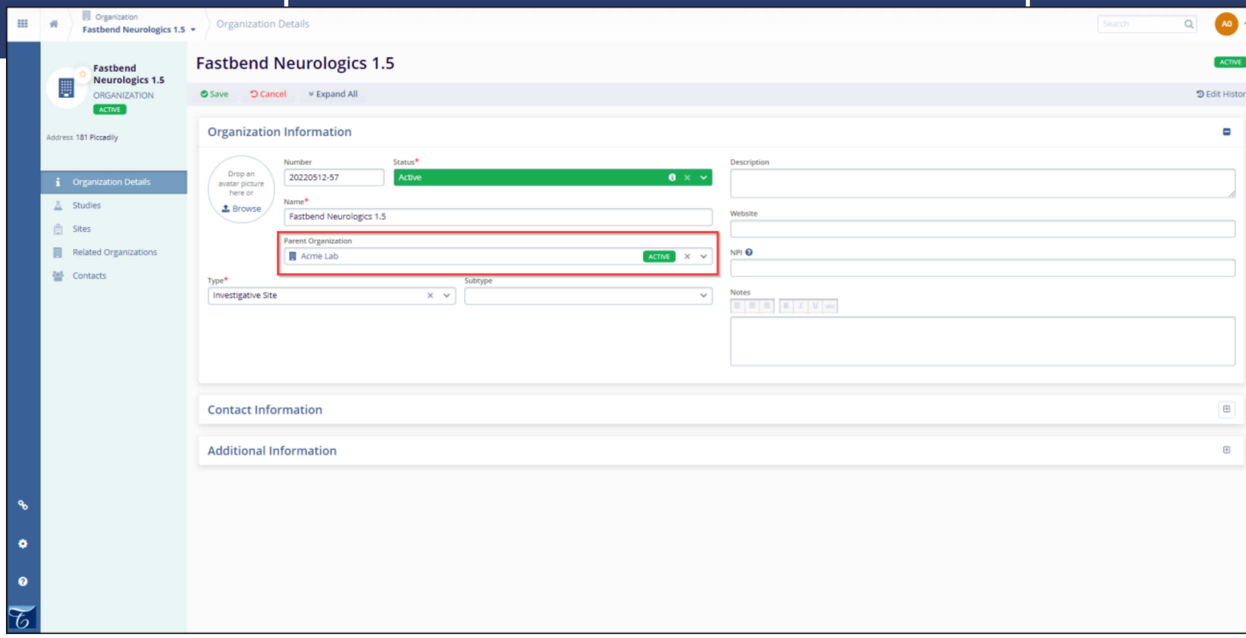
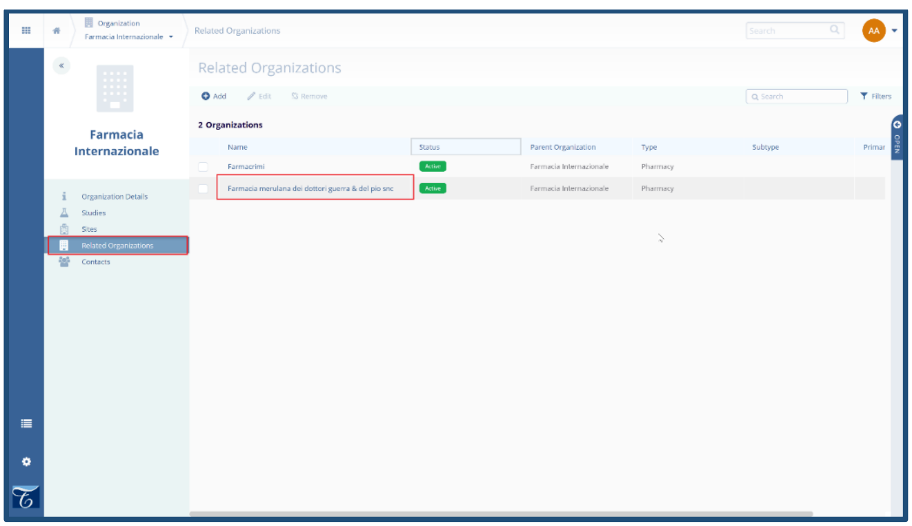


3. Click the **Edit** button in the “Organization Information” window**,** within the **Parent Organization** field select a parent organization from the dropdown options available.
4. Click the **Save** button.
5. The association can be verified by navigating to the Related Organizations area for the selected parent organization. (See the screenshot below).



Associating a Contact to an Organization

1. Click on the **Organizations** link in the Navigation Menu at the left side of the screen.
   a. This opens the “Organization” window.
2. Click on the **Name** of any organization record in the list.
   a. This opens the “Organization Details” window.
3. Click on the **Contacts** link in the Navigation Menu in the panel at the left side of the screen.
   a. This opens the “Contacts” window.

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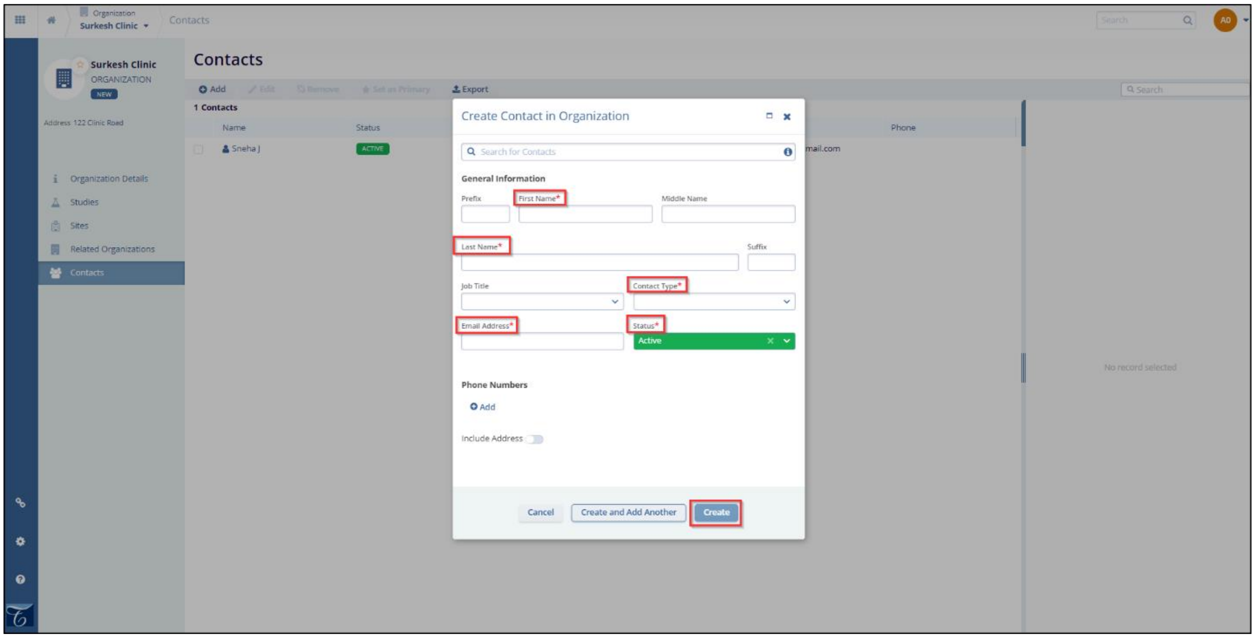
4. Click **Add** and enter the required contact details in the “Create Contact in Organization” window.
5. Click **Create**.



Reviewing Studies Associated to an Organization

1. Click on the **Organization** link in the Navigation Menu at the left side of the screen.
   a. This opens the “Organization” window.
2. Click on the organization’s name in the list.
   a. This opens the “Organization Details” window.
3. Click on the **Studies** link in the Navigation Menu at the left side of the screen.
   a. This opens the “Studies” window.
4. The list of studies is displayed.

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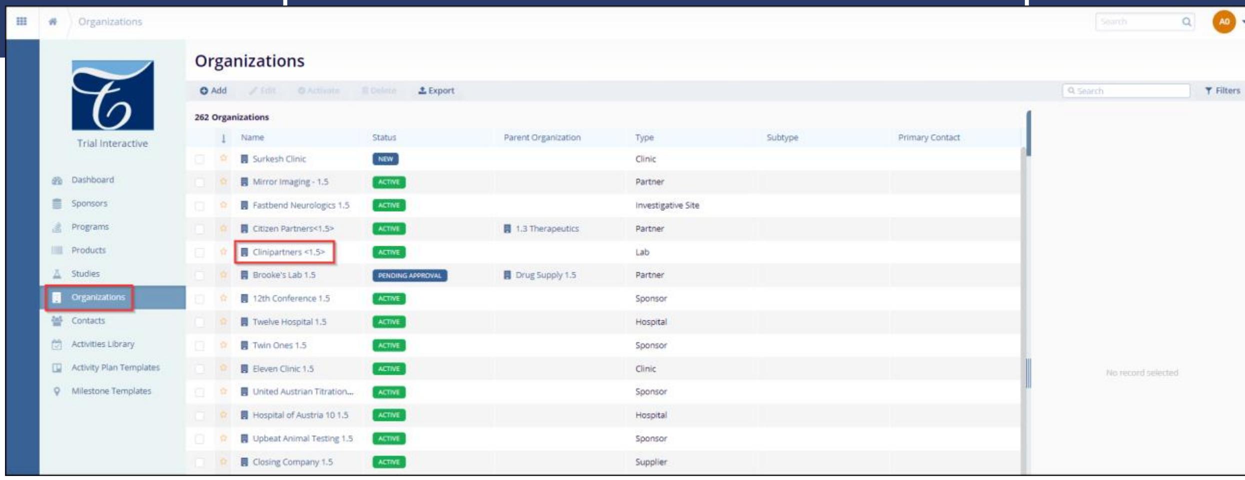

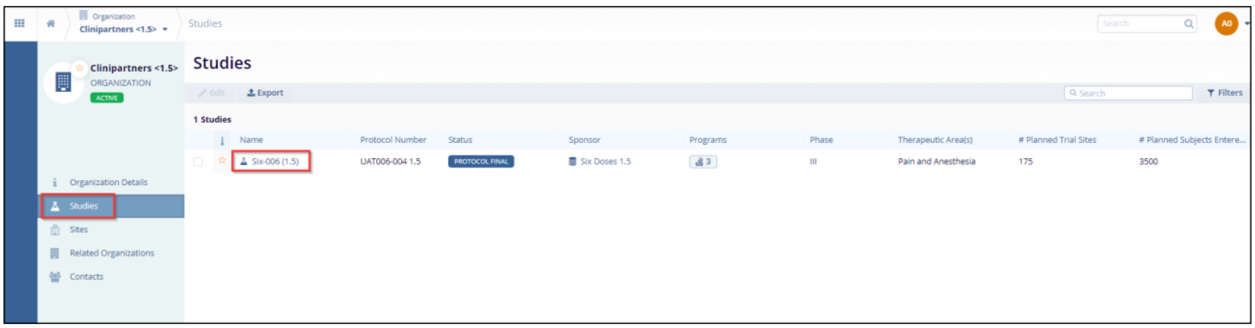

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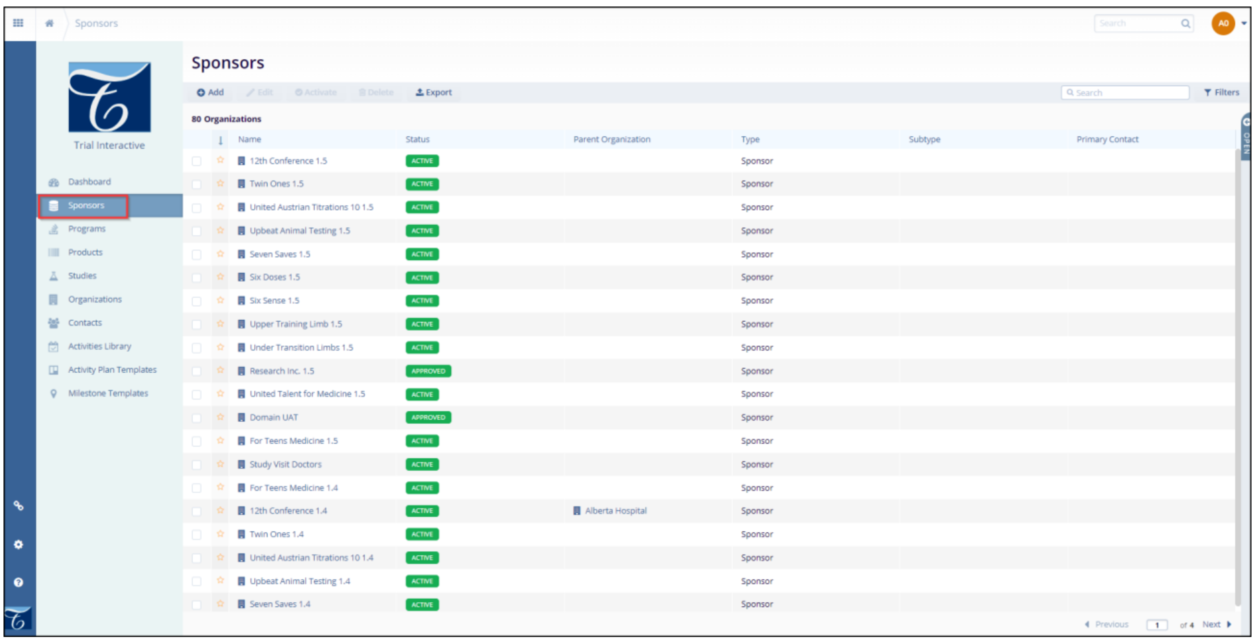
Sponsors

Pre-Requisites

Users creating or managing **Sponsors** in an organization should have **CSM** user access. Company administrators will need to assign CREATE, UPDATE, EDIT and DELETE permissions/privileges to users' accounts so that they can perform these steps.

Defining a Sponsor

1. Click on **Sponsors** link in the Navigation menu at the left side of the screen.
   a. This opens the "Sponsors" window, and Sponsors list is displayed.



2. Click the **Add** button in the top-left of the screen.
   a. This opens the "Create Sponsor" window.
3. Here we need to enter the mandatory metadata to create a sponsor i.e., **Name, Number, Type, Status,** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
4. If any of the required fields are missing, an error will appear when we click on the **Create** button, displaying the fields which need to be filled to create a sponsor successfully.
5. **(Optional)** Click on the **Add** button in the **Phone Number** area to add a contact number to that sponsor.

Note: When creating a contact record with at least one phone number, you will need to designate one phone number as the primary number.

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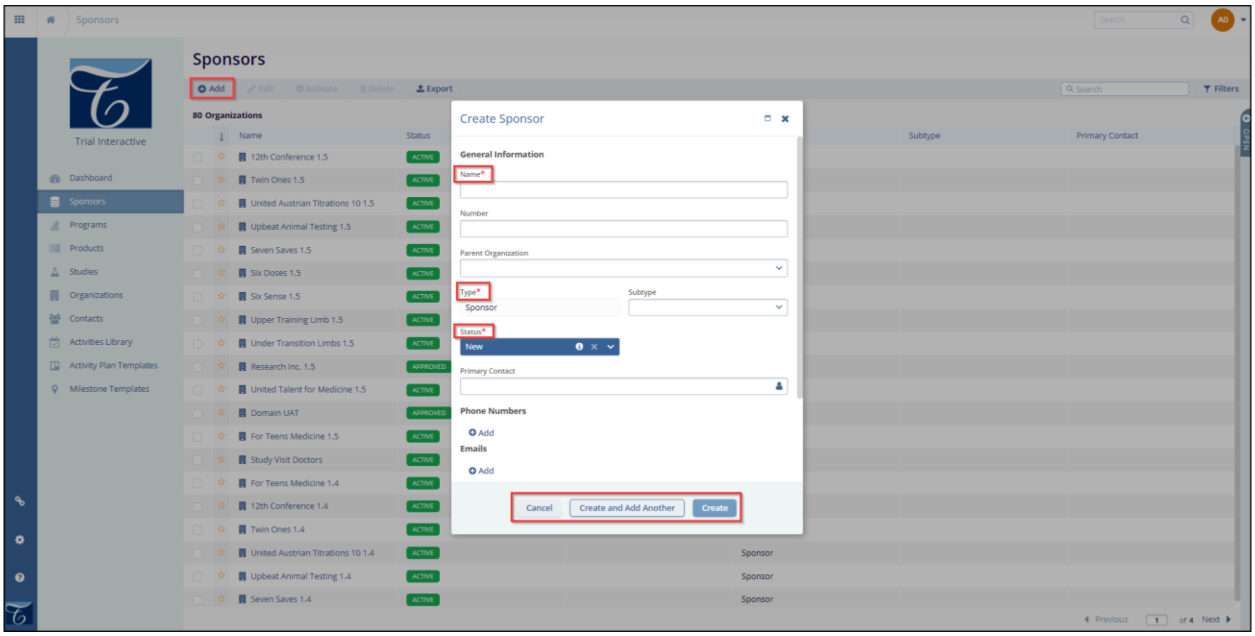
6. **(Optional)** Click **Include Address,** select a type for the address, and enter the address information.

   Note: The Search functionality can be utilized to search for addresses.

7. Finally, before clicking **Create**, verify all the fields are entered correctly in the create sponsor window.
8. Click **Create** or **Select and Add Another** depending on whether you intend to create another sponsor right away.
   a. After clicking **Create,** the “Create Sponsor” window will close, and the sponsor record will be displayed in the list.

   Note: The Type field is predefined and cannot be edited.



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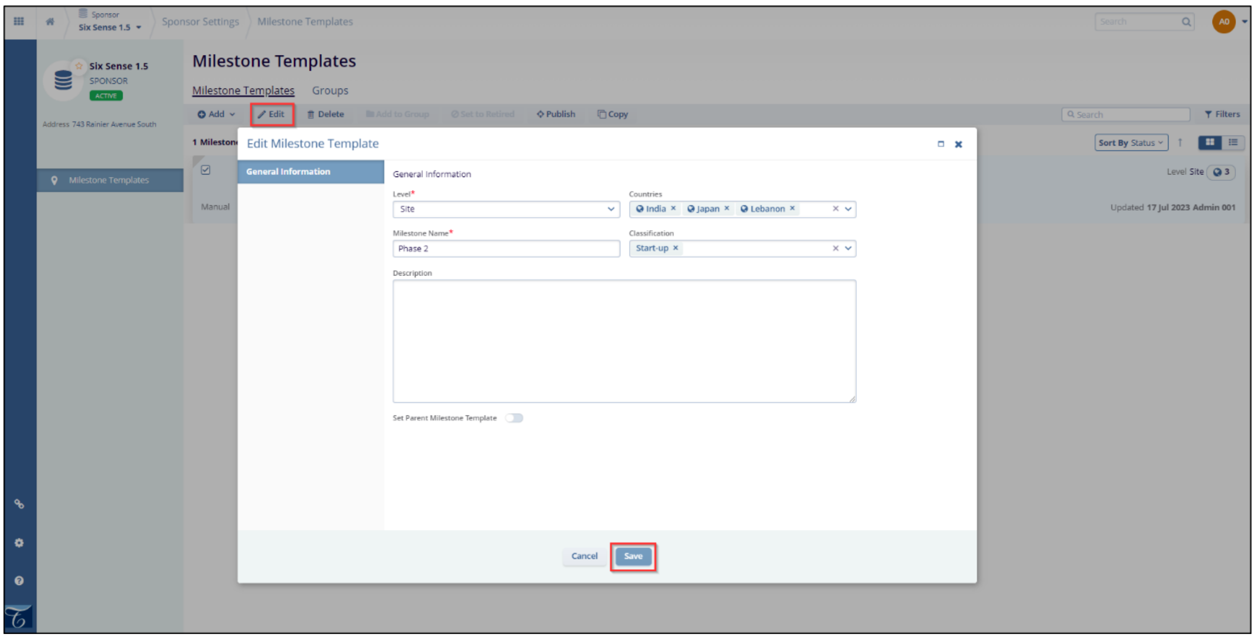
Defining Sponsor Settings

1. Click on **Sponsors** link in the Navigation menu in the panel at the left side of the screen.
   a. This opens the "Sponsors" window, and the Sponsors list is displayed.
2. Navigate to the sponsor's name you want to edit and click on it.
   a. This opens "Sponsor Details" window.
3. Click on the **Settings** button in the top-right of the screen.
   a. This opens Sponsor settings window Milestone Templates screen.
4. Click on the milestone you want to edit.
   a. This opens **Edit Milestone Template** window.
5. Make any necessary changes required in the Edit Milestone Template window.
6. Click **Save** for the changes to apply.



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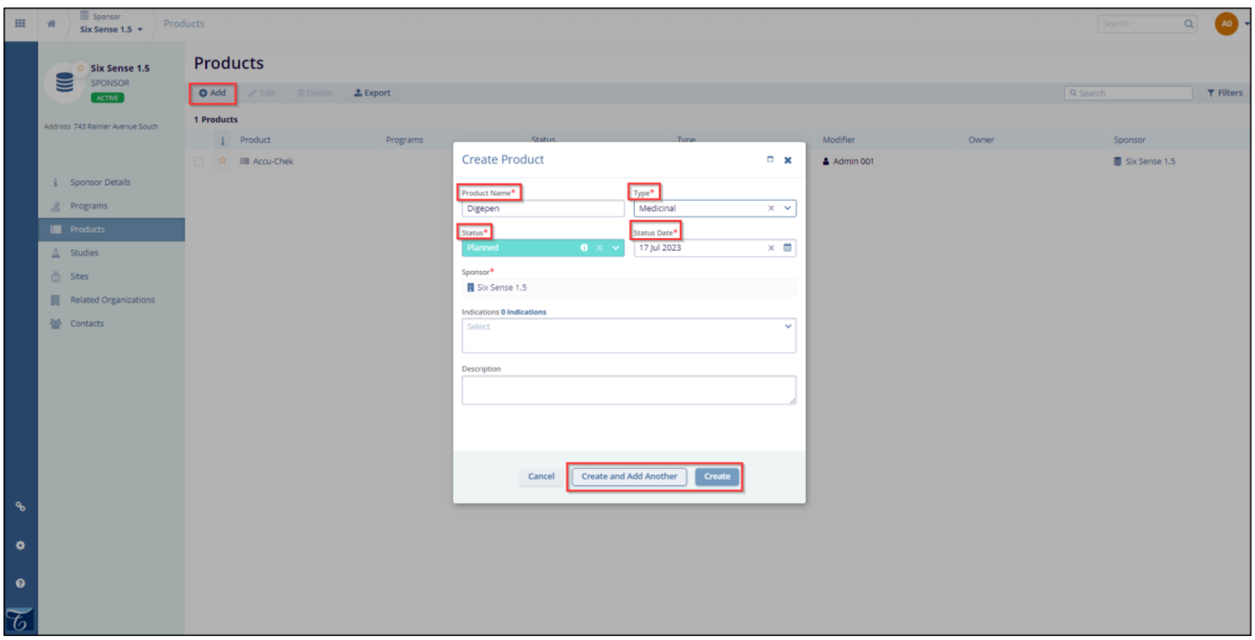
Associating a Product to a Sponsor

1. Click on **Sponsors** in the Navigation menu at the left side of the screen.
   a. This opens the “Sponsors” window, and the list of sponsors is displayed.
2. Click on the name of the sponsor to which you want to associate a product.
   a. This opens the “Sponsors Details” window.
3. Click on the **Products** link in the Navigation menu at the left side of the screen.
   a. This opens the “Product” window.
4. Click on the **Add** button at the top-left of the screen.
   a. This opens “Create Product” window.
5. Here we need to enter the mandatory metadata to create a product i.e., **Product Name, Type, Status, Status Date, Sponsor** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
6. If any of the required fields are missing, an error will appear when we click on the **Create** button, displaying the fields which need to be filled to create a product successfully.
7. **(Optional)** Click **Create** or **Create and Add Another** depending on whether you intend to associate another product to this sponsor immediately.
   Note: The Sponsor field is predefined and cannot be edited.



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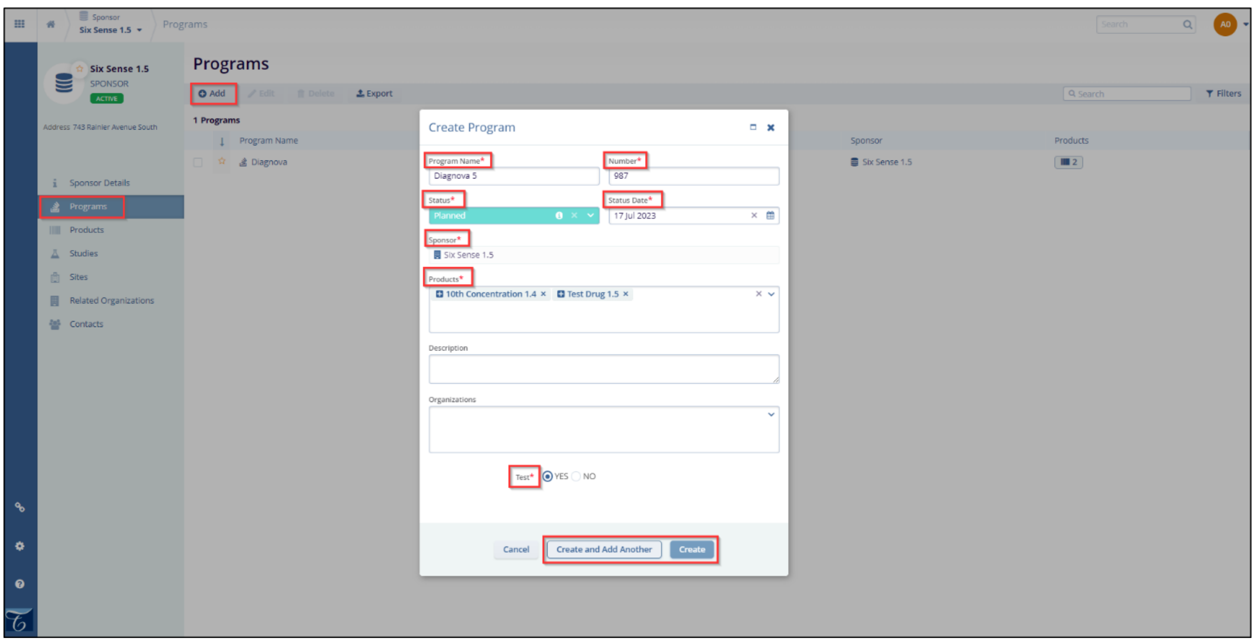
Creating a Program for a Sponsor

1. Click on **Sponsors** link in the Navigation menu in the panel at the left side of the screen.
   a. This opens the “Sponsors” window, and the list of Sponsors is displayed.
2. Click the name of the sponsor to be associated with the new program.
   a. This opens “Sponsor Details” window.
3. Click on the **Programs** link in the Navigation menu at the left side of the screen.
   a. This opens the “Program” window.
4. Click on the **Add** button in the top-left of the screen.
   a. This opens the “Create Program” window.
5. Here we need to enter the mandatory metadata to create a program i.e., **Program Name, Number, Status, Status Date, Sponsor, Products** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
   Note: It is mandatory to enter numbers in between 3 to 255 number or symbols in the number field.
6. If any of the required fields are missing, an error will appear when we click on the Create button, displaying the fields which need to be filled to create a program successfully.
7. **(Optional)** Click **Create** or **Create and Add Another** depending on whether you intend to create another program right away.
8. Select a radio button of Yes or No for the Test field as indicated by an asterisk (*).
   Note: The Sponsor field is predefined and cannot be edited.



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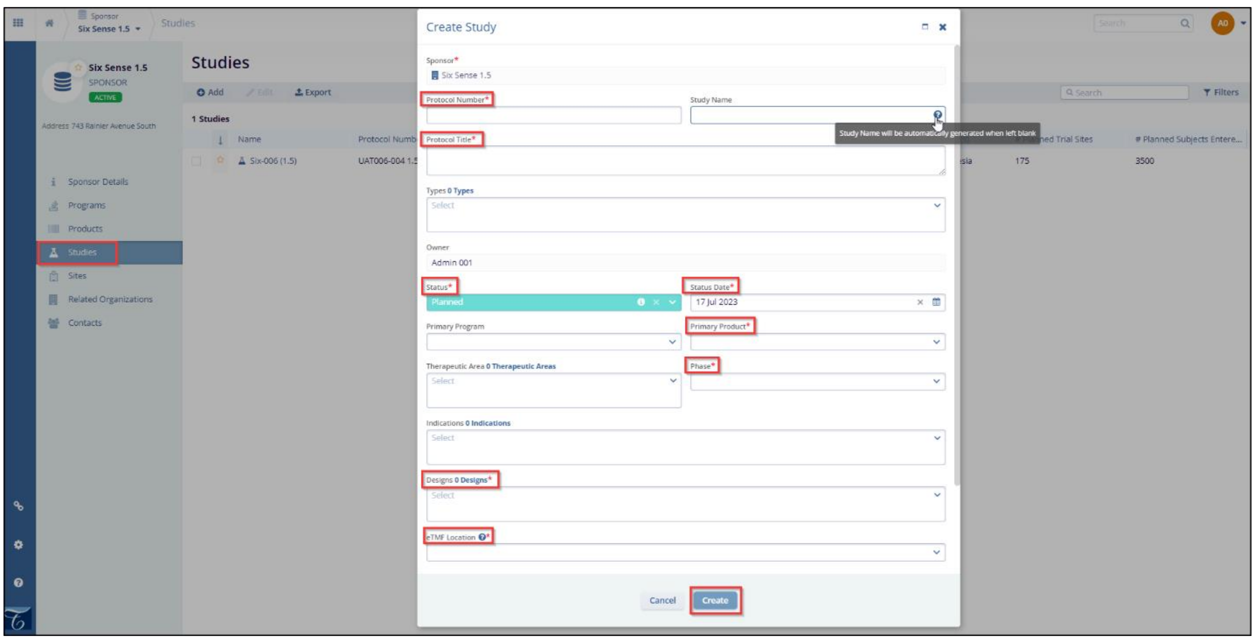
Creating a Study for a Sponsor

1. Click on **Sponsors** in the Navigation menu at the left side of the screen.
   a. This opens the “Sponsors” window, and the Sponsors list is displayed.
2. Click on the name of the sponsor for the new study.
   a. This opens “Sponsor Details” window.
3. Click on **Studies** in the Navigation menu at the left side of the screen.
   a. This opens the “Study” window, and the Studies list is displayed.
4. Click on the **Add** button in the top-left of the screen.
   a. This opens the “Create Study” window.
5. Here we need to enter the mandatory metadata to create a study i.e., **Protocol Number, Protocol Title, Status, Status Date, Primary Product, Phase, Design, eTMF Location** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
6. If any of the required fields are missing, an error appears when we click on the **Create** button, displaying the fields which need to be filled to create a Study successfully.

   Note: Sponsor field is already populated with the name of the sponsor you are working with.



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Reviewing Sites for a Sponsor

1. Navigate to the Home and click on the **Sponsors** link in the Navigation menu at the left side of the screen.
2. Click on the name of the sponsor.
   a. This opens the “Sponsor Details” window
3. Click on the **Sites** in the Navigation menu at the left side of the screen.
   a. This opens the “Sites” window to view the sites for a sponsor.

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Pre-requisites

Each organization will need to decide who should create Contacts. It may be a specific group of people in the organization who are assigned to handle this to reduce the chances of creating duplicate records. Company administrators will need to assign CREATE, UPDATE, EDIT and DELETE permissions/privileges to user's accounts to that they can perform this step.

Levels of Contact Creation in the Application

There are multiple levels of creating and managing a contact, one is at the Domain Level, if a contact is created at Domain level it can be accessed and used anywhere in the system. The other way of creating and managing a contact is at their respective sub level (Site, Organization, Product, etc.). Contacts may be used at the level at which they are created as well as any lower levels of the data hierarchy.

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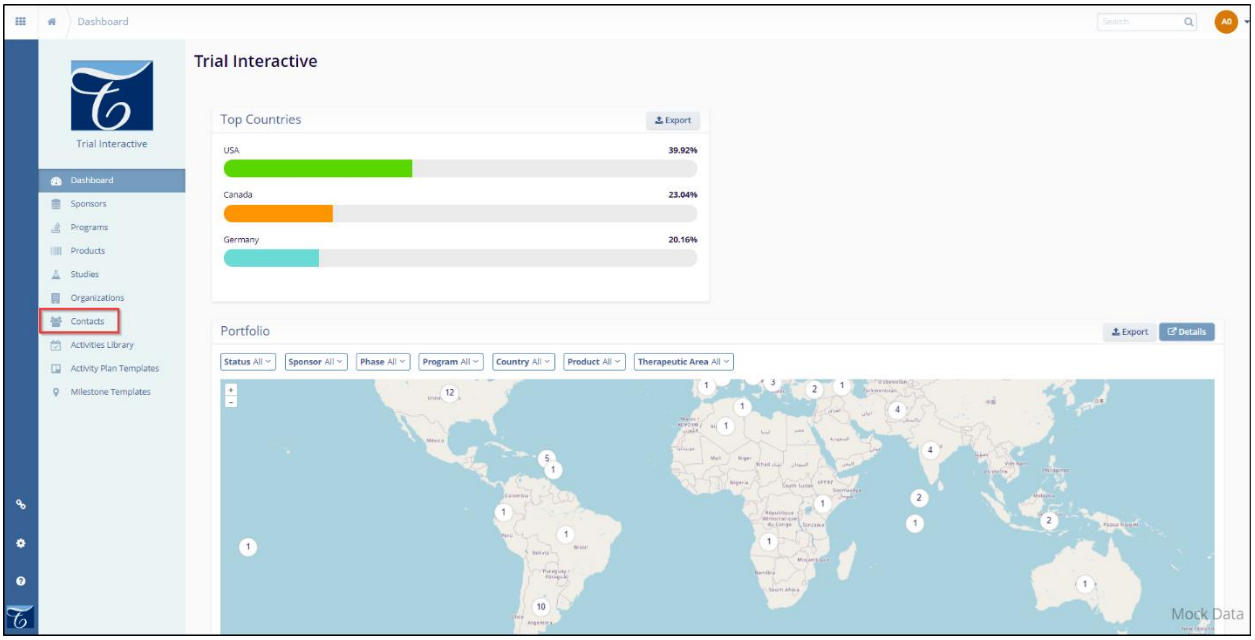
Creating a Contact



1. Navigate to the appropriate level in the data hierarchy (i.e., Domain, Study, Site).
2. Click on the **Contact** link in the Navigation menu at the left side of the screen.
   a. This opens the “Contact” screen.
3. Click on the **Add** button at the top-left of the screen.
   a. The “Create Contact” window is opened.
4. Here we need to enter the mandatory metadata to create a contact i.e. **First Name, Last Name, Email Address and Status** which have an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
5. If any of the required fields are missing, an error will appear when we click on the **Create** button and it displays the fields which need to be filled to create a contact successfully.
6. **(Optional)** Click on the **Add** symbol below **Phone Number** to add a contact number to that person.

   Note: When creating a contact record with at least one phone number, you will need to designate one phone number as the primary number.

7. **(Optional)** Click the toggle button of **Include Address,** select a type for the address, and enter the address information.

   Note: The Search functionality can be utilized to search for addresses.

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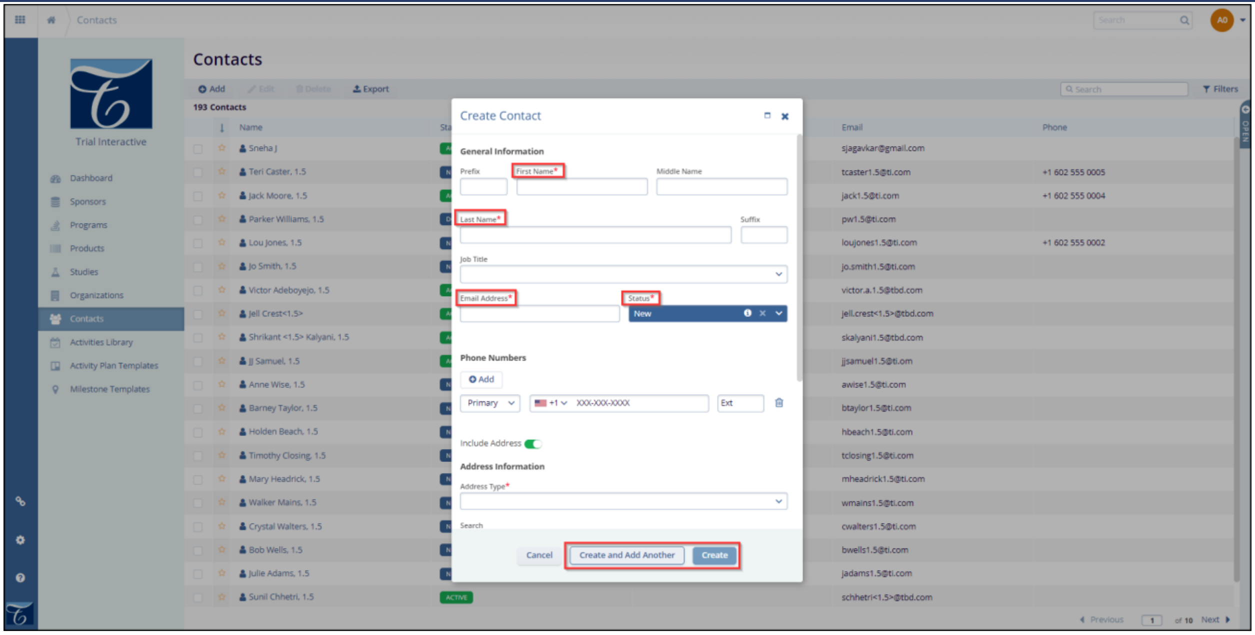

8. Finally, before clicking **Create,** verify that all the fields are entered correctly in the Create Contact window.
9. **(Optional)** Click **Create** or **Create and Add Another** depending on whether you intend to create another contact right away.

Editing a Contact at Domain, Site and Organization Levels

- The user must have been assigned the necessary permissions by the Company Administrator.

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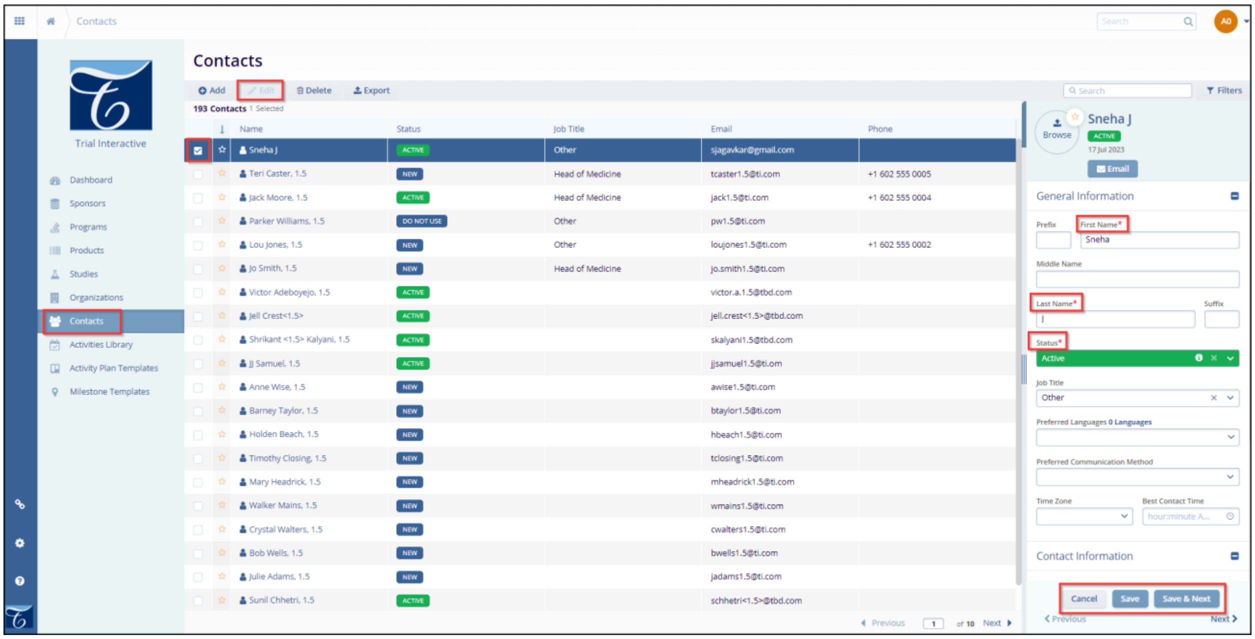
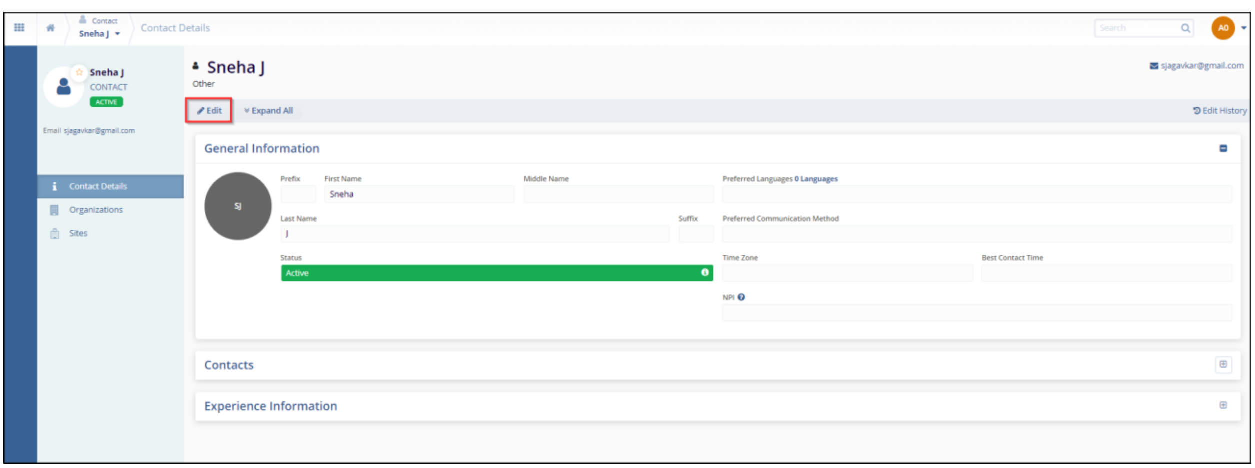
Editing a Contact

1. Click on the check box before the contact’s name.
    a. A quick view panel will display on the right side of the screen.
2. Click on the **Edit** button (pencil icon) and make any necessary changes to the contact information.
3. Click on the **Save** button at the bottom of the quick view panel.



4. Make sure to check the all the fields and click on the **Save** Button for the changes to apply.
5. **(Optional)** Clicking on the Contact’s name will open the Contact Details page. Editing a contact may also be done on the Contact Details page.



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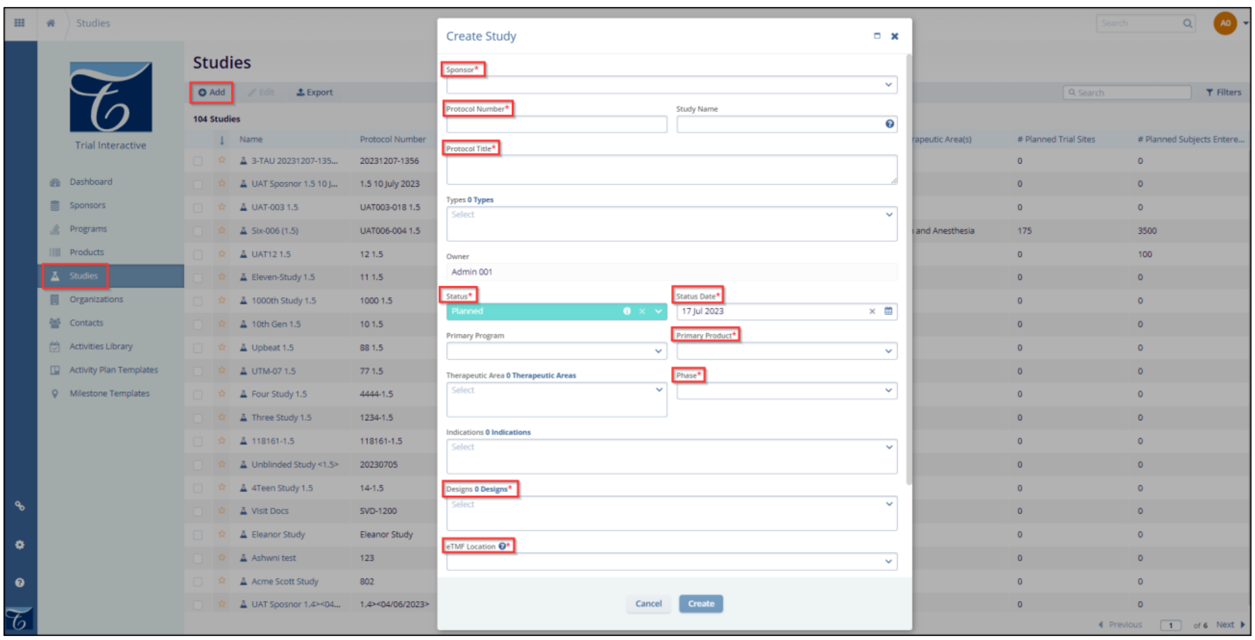
Studies

Pre-Requisites

Users creating or managing Studies in an organization should have CSM user access. Company administrators will need to assign CREATE, UPDATE, EDIT and DELETE permissions/privileges to user's accounts so that they can perform these steps.

Creating a Study

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
    a. This opens the "Studies" window and study list is displayed.
2. Click on the **Add** button at the top-left of the screen.
    a. The "Create Study" window will open.



3. Here, we need to enter the mandatory metadata to create a study i.e., **Sponsor, Protocol Number, Protocol Title, Status, Status Date, Primary Product, Phase, Design and eTMF Location** as indicated by asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
4. This is also where you will indicate whether or not this is a blinded trial. You can do this directly from the Study Details page after the study has been created but this is your first chance to indicate that this study will have a blinded component.

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5. If any of the required fields are missing, an error will appear when we click on the **Create** button, displaying the fields which need to be filled to create a study successfully.
6. (Optional) Click the toggle buttons for – **Virtual Study**, **Subject Tracking** and **Is this a blinded trial**.
7. Finally, before clicking **Create,** verify all the fields are entered correctly in the Create Study window.
    a. The **Create Study** window closes, and the study record is displayed in the list.

Blinded Studies

Studies that have been indicated as blinded will have the ability to display appropriate information only to specifically indicated personnel.

Adding Unblinded Personnel to a Blinded Study

Unblinded personnel can only be added to a study by an unblinded study manager. In order to safeguard this information, the only way to add an unblinded study manager to a study is to contact the Trial Interactive Service Desk. Service Desk personnel will verify the intent and authenticity of the request prior to proceeding. The unblinded study manager is able to add unblinded members to the study team using the steps outlined in the related section of the User Guide.

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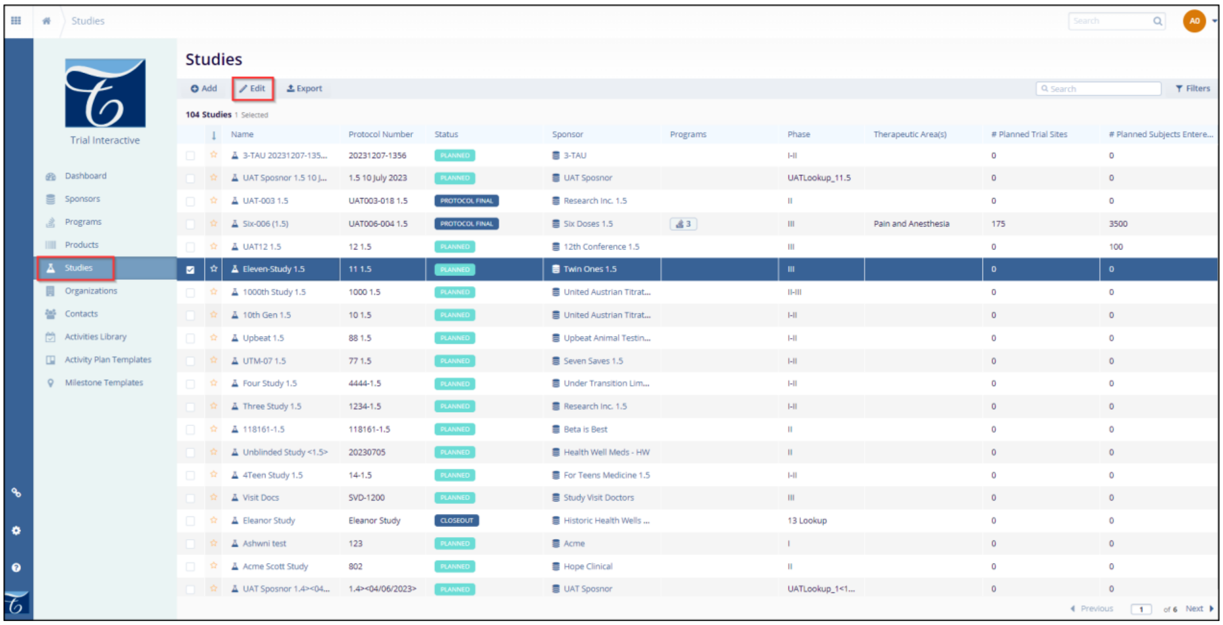
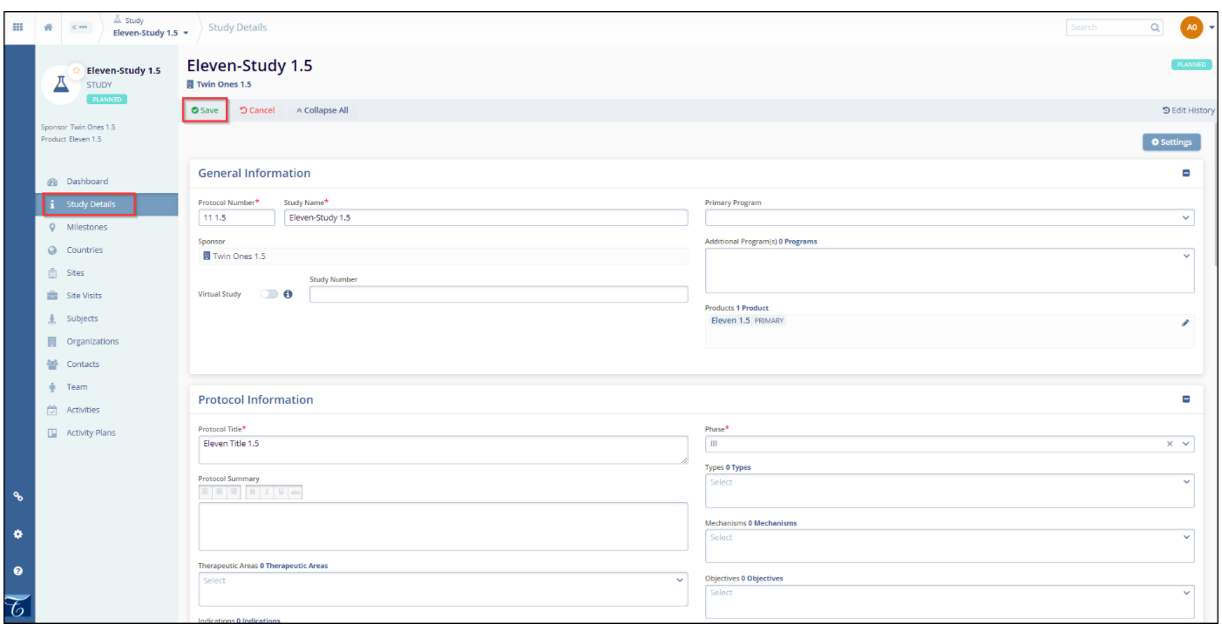
Editing a Study

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
   a. This opens the “Studies” window, and the study list is displayed.
2. Click on the check box next to the name of the study and click on the **Edit** button at the top-left of the screen.
   a. The “Study Details” window is displayed.



3. Make any necessary changes to the Study information.
4. Click the **Save** button for the changes to apply.



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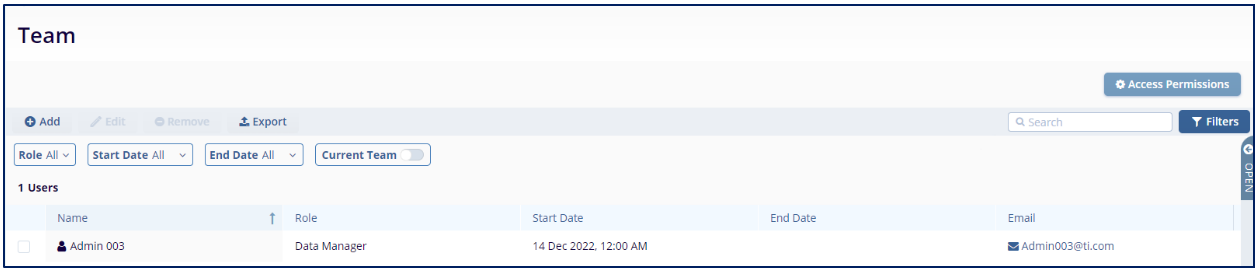
Study Team vs Access Permissions

TI CTMS separates the study team from access permissions for the study. Managing the study team is done from the Team area at the study level by using the navigation links at the left side of the screen.

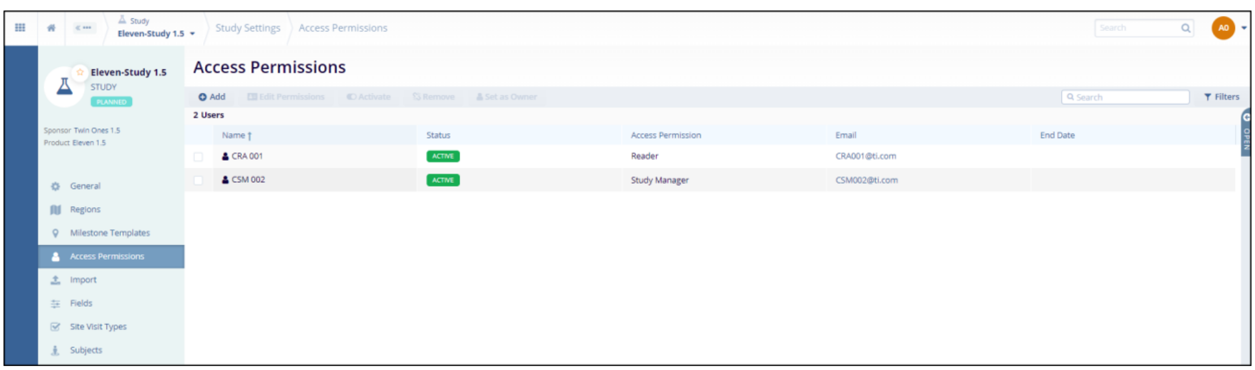


Some important points to note about managing study team members are:

- When someone is added to the study team, they are not awarded access to view study information in the CTMS. This area is specifically designed to track members of the team and which role(s) they are fulfilling for this specific study.
- Once an entry has been made, the role will not be editable. If you have made an error, you will need to delete the entry and create a new one. For correct entries, if a team member moves on to a new role within the study, the study manager should enter an end date for the old role and create a new entry for the new role. This is to aid in providing tracking for each study team member and the roles that they may play over the course of a study.

Managing Study Access Permissions

You will see an ‘Access Permissions’ button at the top-right of the Study Team area. Clicking on that button will take you to the Site or Study Settings area as appropriate and the Access Permissions menu. Users can also navigate directly there by accessing the settings area directly.



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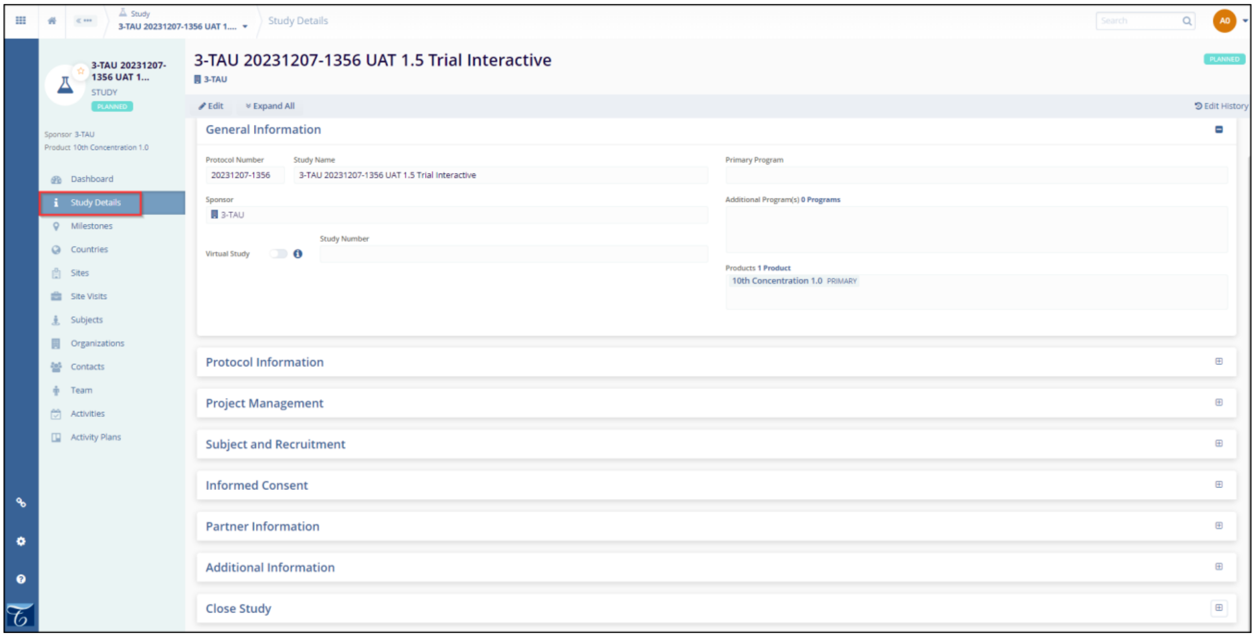
Entering Study Settings

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
   a. This opens the “Studies” window and study list is displayed.
2. Click on the name of the study in the list.
   a. The dashboard for the study is displayed.
3. Click on the **Study Details** in the Navigation menu at the left side of the screen.
   a. The “Study Details” window is displayed.



4. Click **Settings** in the top-right corner of the **study details** window.
   a. This opens **Study Settings General** window.

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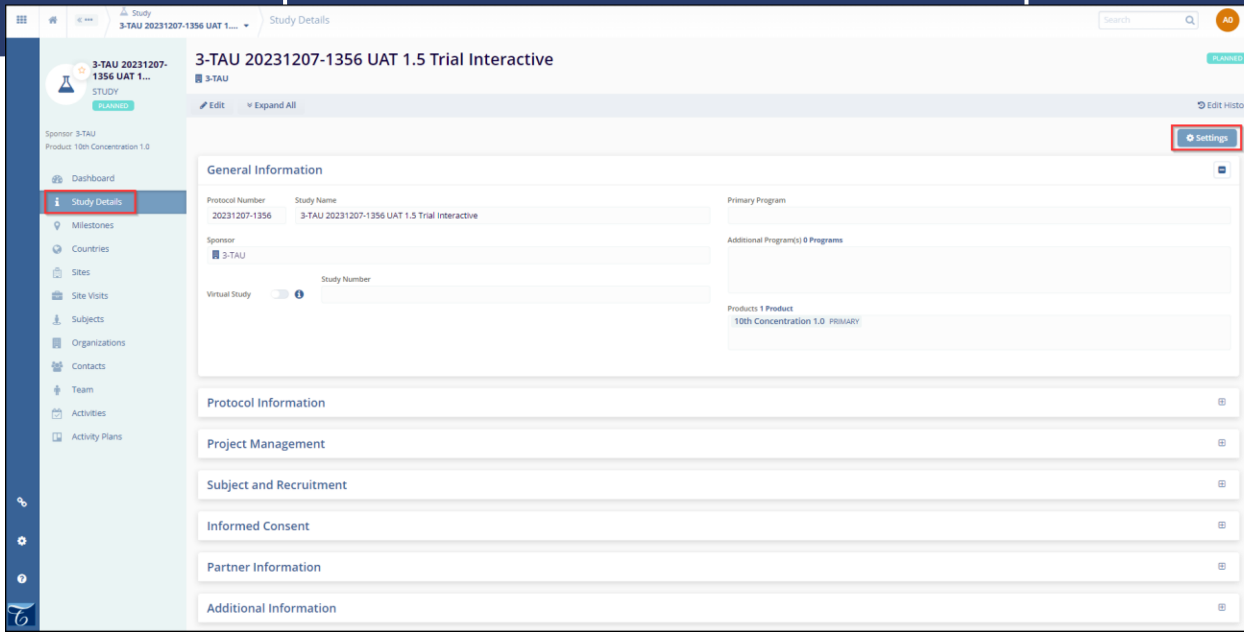
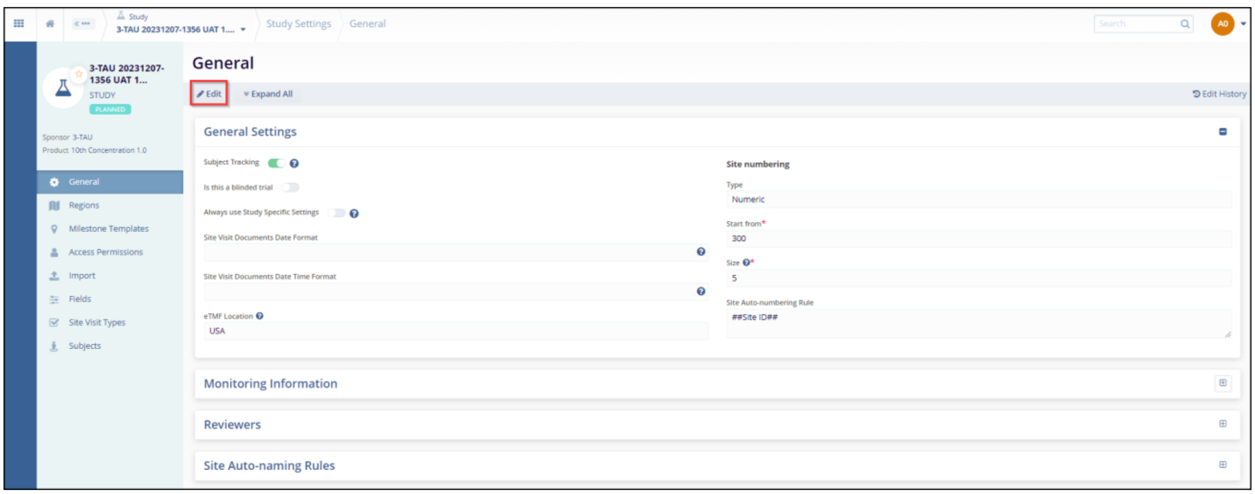


5. Click **Edit** from the study settings window at the top-left of the screen.



6. Make any necessary changes in the **Study Settings General** window.
7. Click on **Save** at the top-left of the window.

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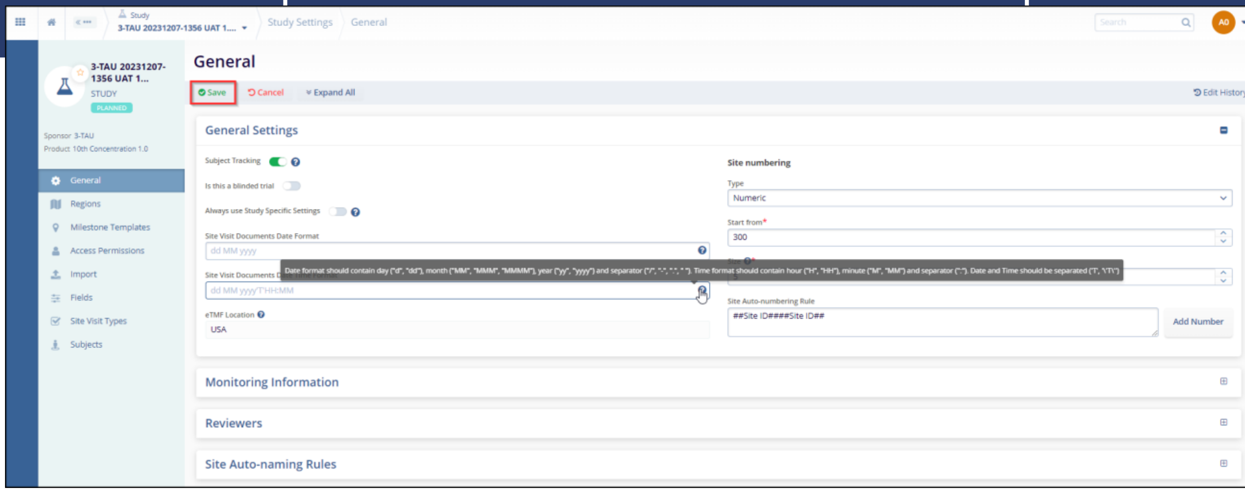

Note: Turning off Subject Tracking will prevent the creation of subject records. Actual subject enrollment statistics are still rolled-up from the site level.

Defining Study Specific Regions

1. Click on the **Studies** in the Navigation Menu at the left side of the screen.

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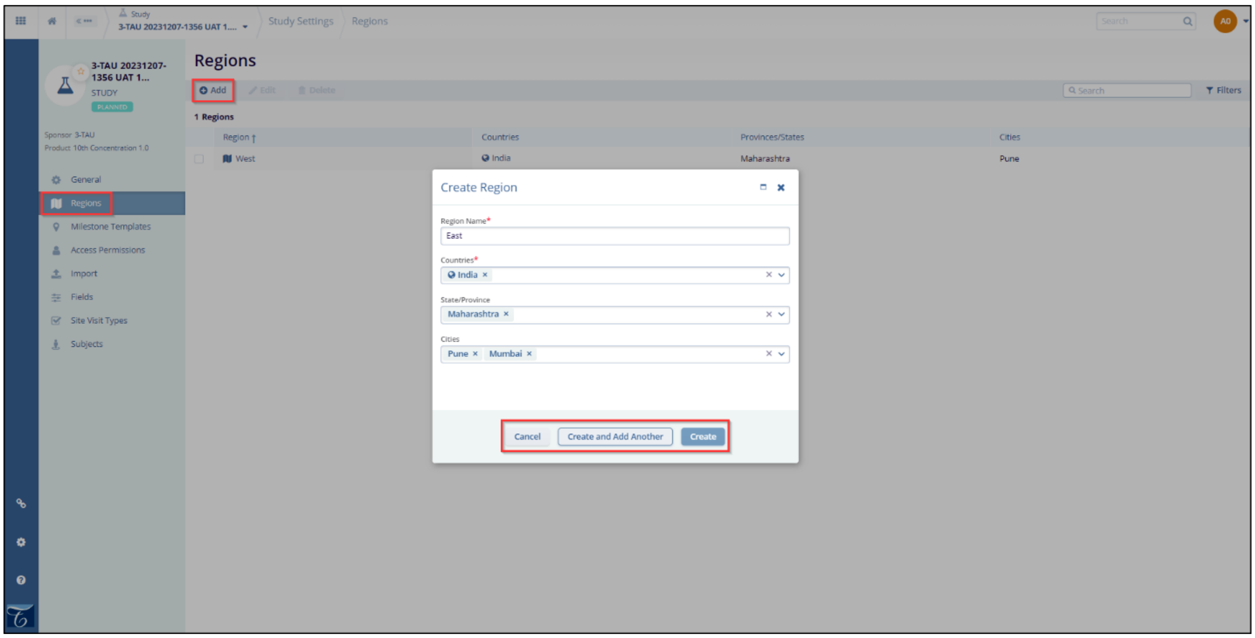
   a. This opens the “Studies” window.
2. Click on the name of the study for which you want to define regions.
   a. This opens the dashboard for the study.
3. Click on the **Study Details** in the Navigation menu at the left side of the screen.
4. Click on the **Settings** button in the top-right corner of the screen.
   a. This opens the **Study Settings** window.
5. Click on **Regions** in the Navigation menu at the left side of the screen.
   a. The “Regions Window” is displayed.
6. Click on the **Add** button at the top-left of the screen.
   a. This opens the “Create Region” Window.
7. Here we need to enter the mandatory metadata to create a Region i.e., **Region Name, Countries** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
8. Click **Create** or **Create and Add Another** depending on whether you intend to create another Region right away.



Note: To enter the State/Province and Cities values you must select only a **single country** for your region definition.

Editing Study Regions

1. Navigate to the Regions area for the study you wish to edit.

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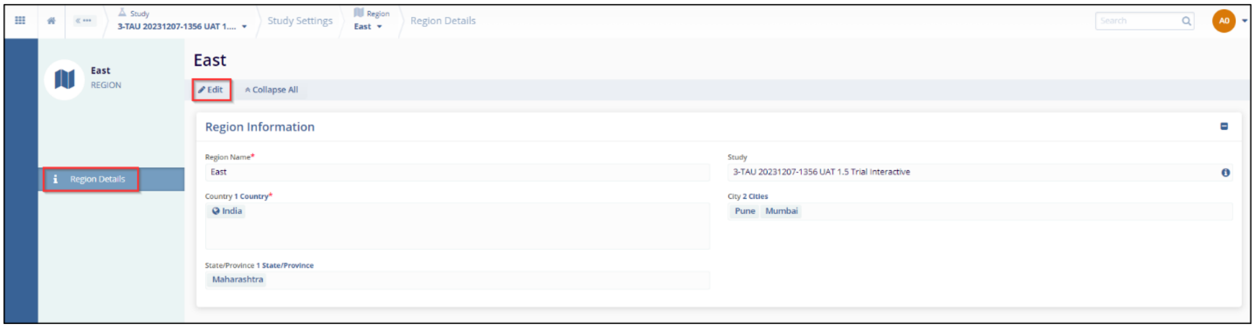
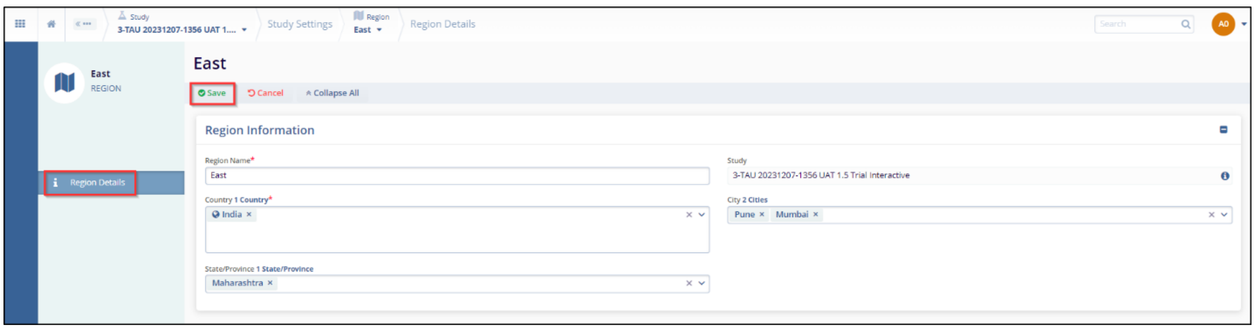
   a. The necessary steps are found here.
2. Click on the region name from the list you want to Edit.
   a. This opens "Region Details" window.
3. Click on the **Edit** button in the-top-left corner.



4. Make any necessary changes in the **Region Details** window.
5. Click on **Save** button in the top-left for the changes to apply.



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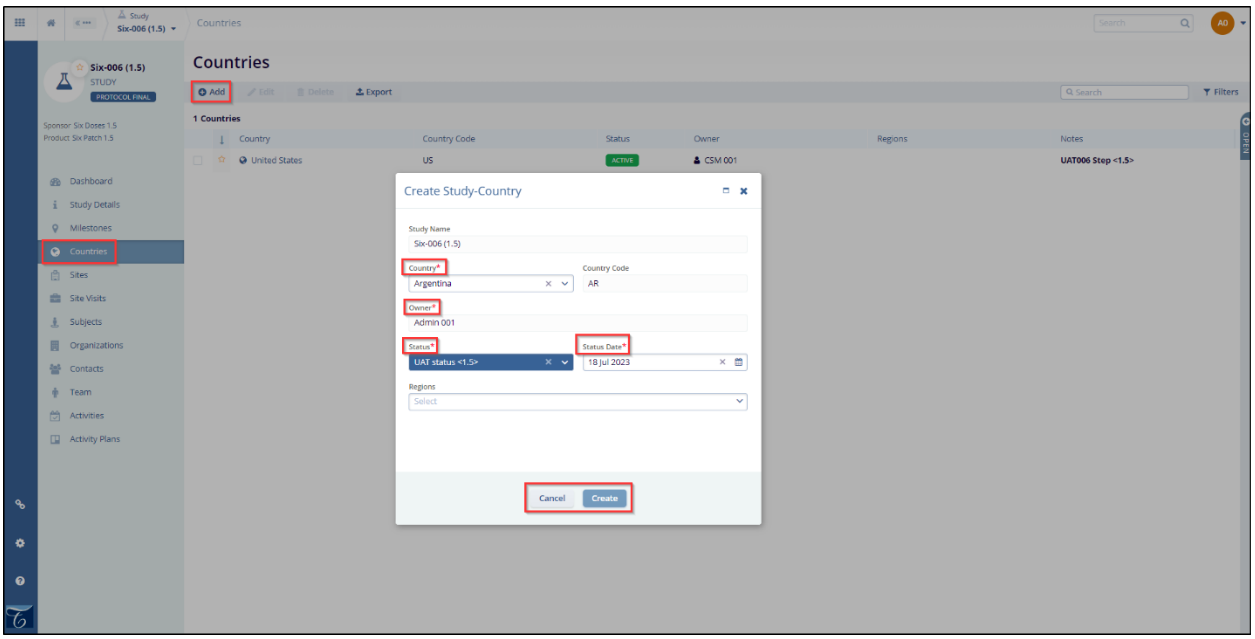
Defining and Editing Countries Within a Study

1. Click on **Studies** in the Navigation Menu at the left side of the screen.
   a. This opens the “Studies” window.
2. Click on the name of the study in which you want to define countries.
   a. This opens the dashboard for the study.
3. Click on **Countries** link in the Navigation menu at the left side of the screen.
   a. This opens the “Countries” window, and countries list is displayed.
4. Click **Add** in the top-left of the screen.
   a. This opens **Create Study-Country** window.
5. Here we need to enter the mandatory metadata to create a Region i.e., **Country, Owner, Status, Status Date** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
6. Click the **Create** button, the country is created, and the “Create Study-Country” window is closed.



7. To edit the country, click on the check box before the name of the country you want to edit.
8. Click **Edit** in the top-left of the screen.
   a. A quick view panel is displayed on the right side of the screen.
9. Make any necessary changes in the quick view panel.
10. Click **Save** displayed at the bottom in the quick view panel.

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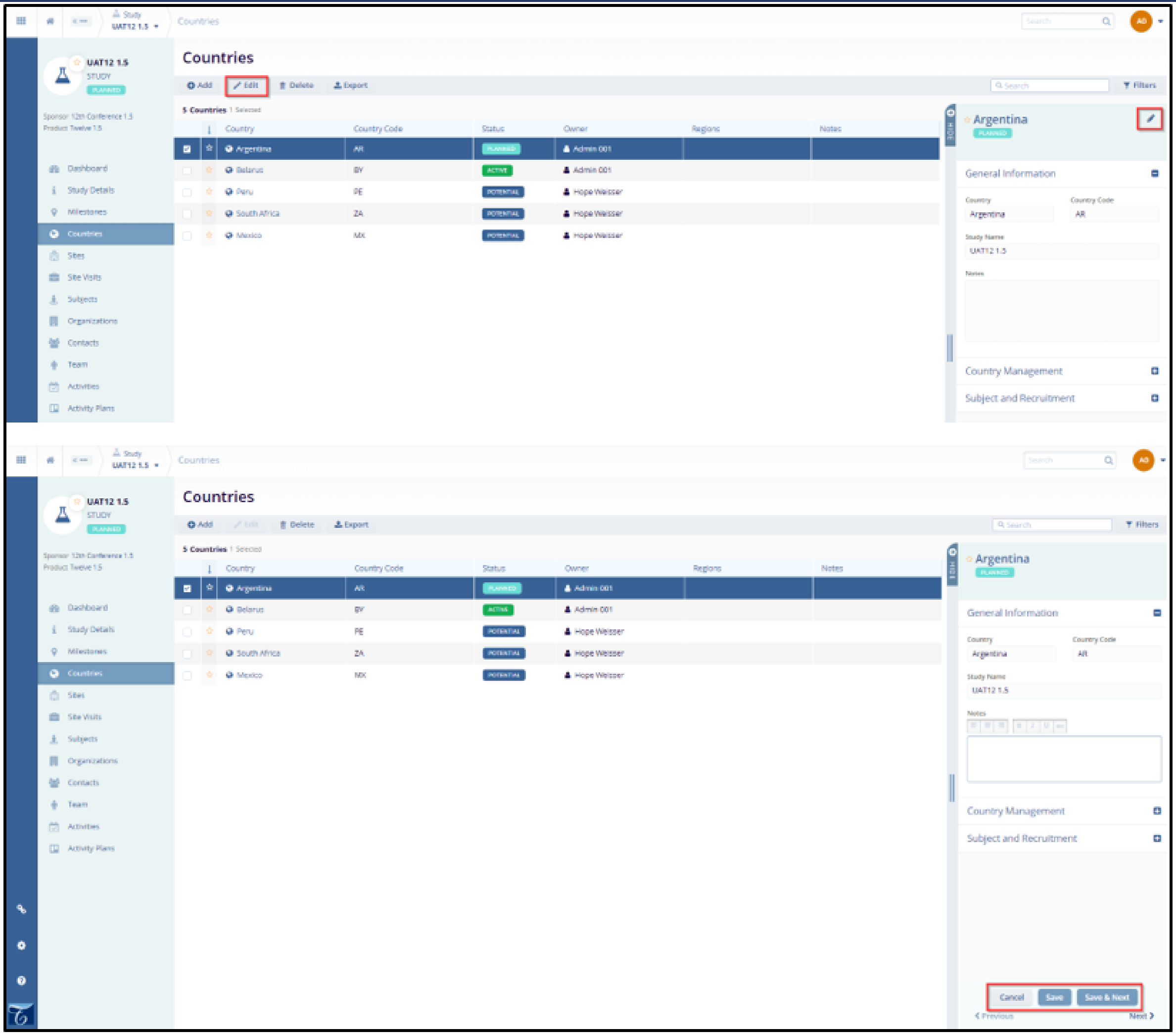

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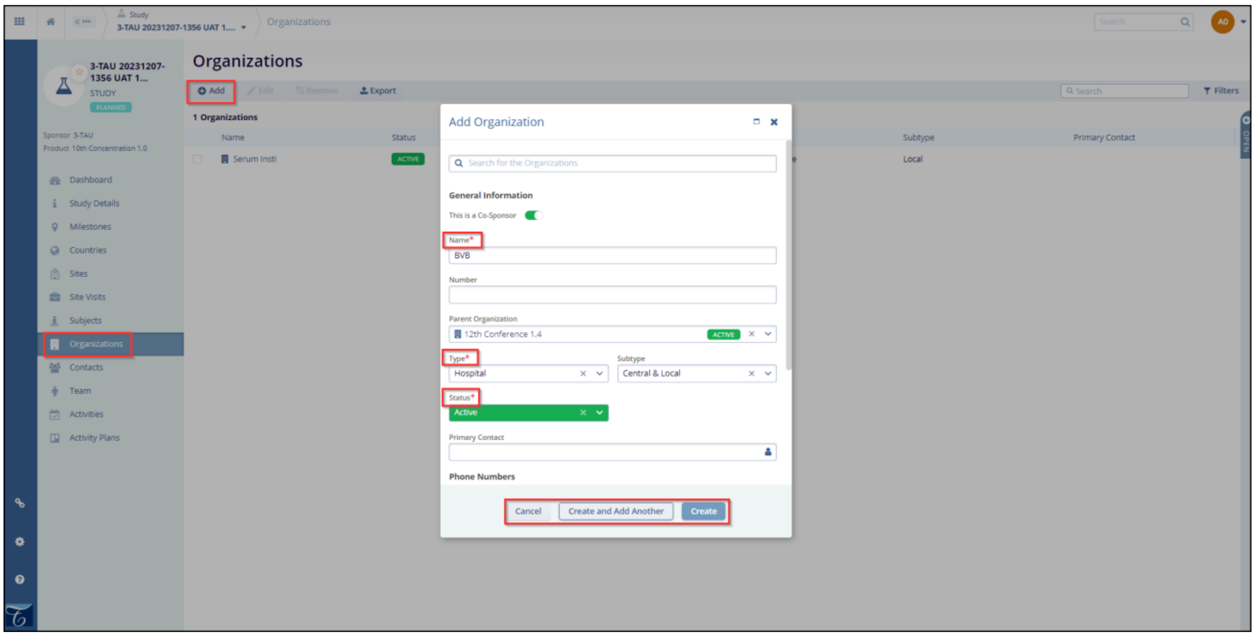
Associating Organizations to a Study

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
    a. This opens the “Studies” window.
2. Locate the study to which you want to associate an organization and click on it.
    a. This opens the dashboard for that study.
3. Click on the **Organization** link in the Navigation menu at the left side of the screen.
    a. This opens the “Organization” window, organizations associated to the study are displayed.
4. Click on the **Add** button at the top-left of the screen.
    a. This opens the “Add Organization” window.



5. If you need to create a new organization, follow these steps showing how to create an Organization.
6. (Optional) Click the toggle button of ‘This is a Co-Sponsor’.
7. If the organization has already been created, use the search area to locate and select the organization.
8. Click **Create** or **Create and Add Another** depending upon whether you need to associate another organization to this study.

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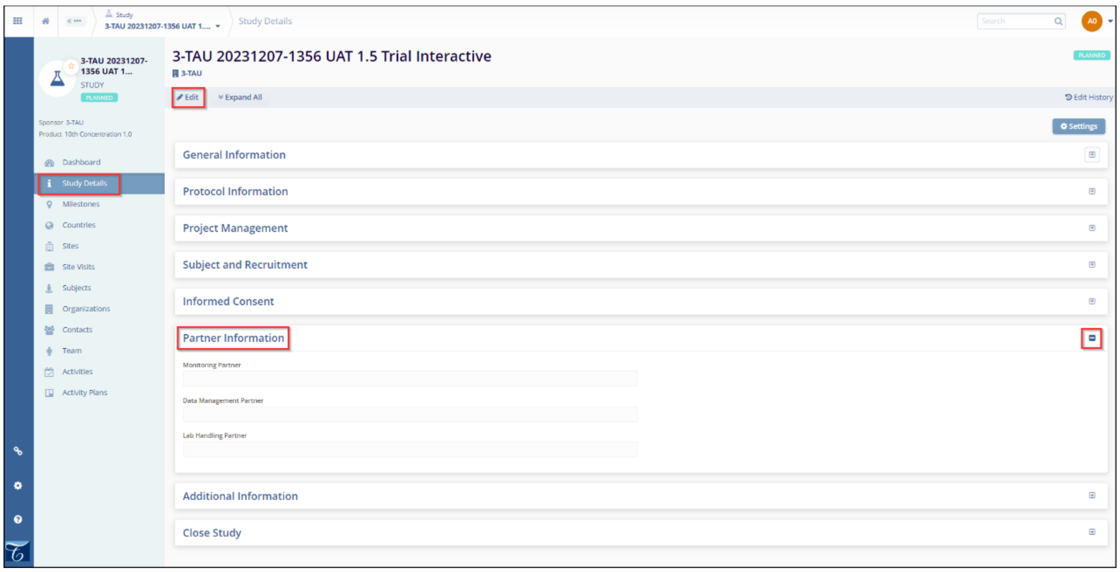
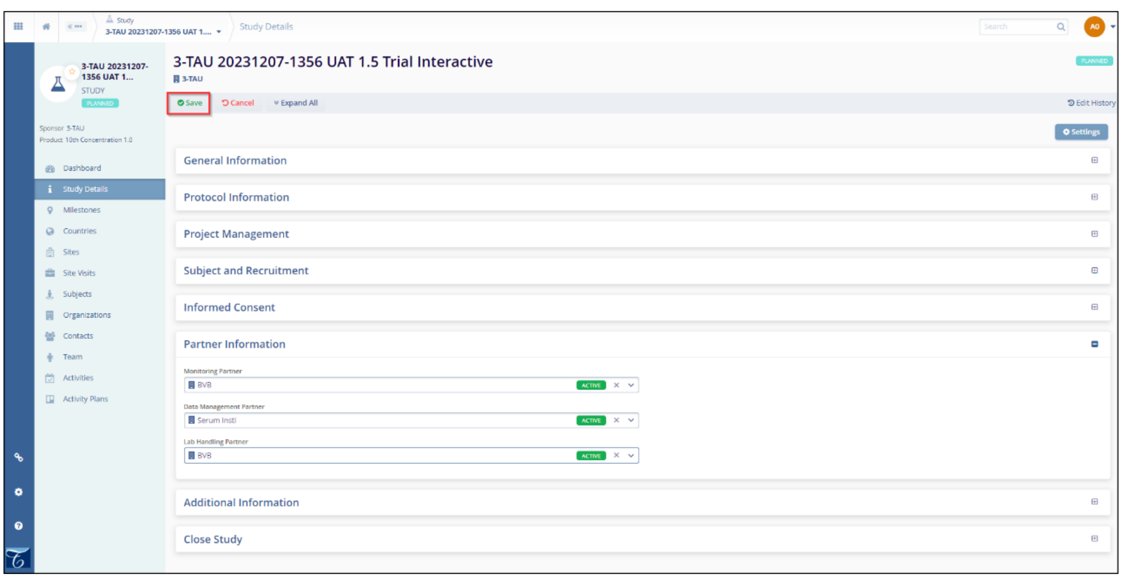
Defining Study Partners

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
   a. This opens the “Studies” window and study list is displayed.
2. Click on the name of the study to which you want to add partner information.
   a. The dashboard for the study is displayed.
3. Click on the **Study Details** in the Navigation menu at the left side of the screen.
   a. The “Study Details” window is displayed.
4. Click on the **[+]** sign next to the **Partner Information** to expand that section.
   a. Click on the **Edit** button in the top-left of the screen.



5 Make the necessary changes in the partner information section.
6 Click the **Save** button in the top-left of the screen.



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Associating Contacts to a Study

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
   a. This opens the "Studies" window and study list is displayed.
2. Click on the name of the study to which you want to associate contacts.
   a. The dashboard for the study is displayed.
3. Click on the **Contacts** link in the Navigation menu at the left side of the screen.
   a. This opens the "Contacts" window and all the contacts for the study are listed.
4. Click on the **Add** button at the top-left of the screen.
   a. This opens the **Create Contact in Study** window.
5. Here we need to enter the mandatory metadata to create a Contact i.e., **Organization, First Name, Last Name, Contact Role, Email Address, Status** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
6. **(Optional)** Click on the **Add** symbol below **Phone Number** to add a contact number to that person.

   Note: When creating a contact record with at least one phone number, you will need to designate one phone number as the primary number.

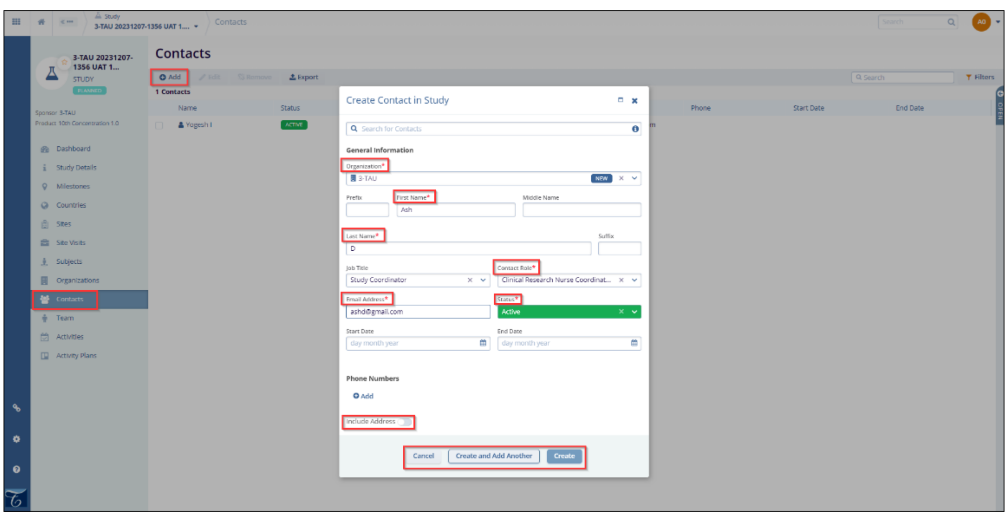
7. **(Optional)** Click **Include Address,** toggle button to select a type for the address, and enter the address information.

   Note: The Search functionality can be utilized to search for addresses.

8. Finally, before clicking **Create,** verify all the fields are entered correctly in the **Create Contact in Study** window.
9. **(Optional)** Click **Create** or **Create and Add Another** depending on whether you intend to create another Contact right away.

   Note: Contacts can only be created for organizations associated to the study.

10. When editing one of the contact records from the list, only data that is part of the contextual to study can be updated.



Creating Sites within a Study

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.

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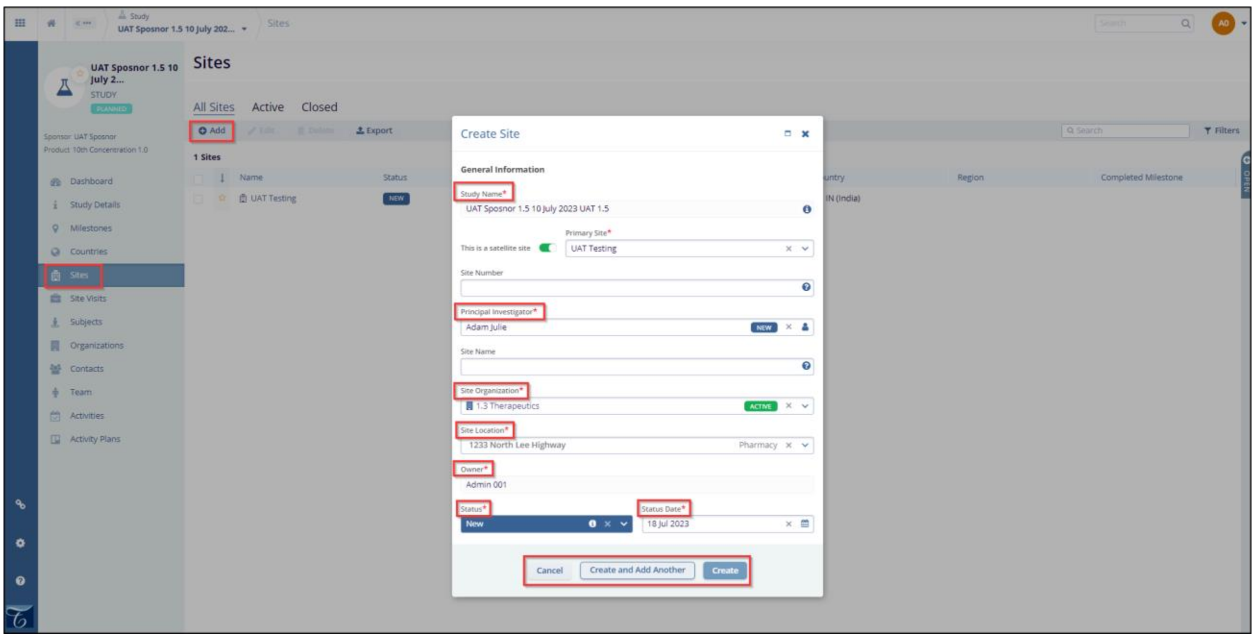
   a. This opens the “Studies” window and study list is displayed.
2. Click on the name of the study to which you want to add Sites.
   a. The dashboard for the study is displayed.
3. Click on the **Sites** link in the Navigation menu at the left side of the screen.
   a. This opens the “Sites” window, and all the sites are listed for the study.
4. Click on the **Add** button at the top-left of the screen.
   a. This opens the **Create Site** window.
5. Here we need to enter the mandatory metadata to create a site i.e., **Site Number, Principal Investigator, Site Organization, Site Location, Owner, Status and Status Date** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
   a. If the site is a satellite site, this is also where you would identify the parent site. Please note that the parent site will need to already be created and associated with the study before identifying a site as a satellite site.
   b. Select the Primary Site from the dropdown menu displayed next to the toggle button as indicated by an asterisk (*).

Note: The **Site Number** field is limited to 5 characters. Satellite sites can either have a unique site number or they can use the same number as the parent site.



6. Finally, before clicking **Create,** verify all the fields are entered correctly in the **Create Site** window.
7. **(Optional)** Click **Create** or **Create and Add Another** depending on whether you intend to create another Site right away.

Managing Site Contacts

The functionality here is similar to the improvements described above in the section about managing the study team. Each contact can have multiple entries as needed to indicate the various roles that they may play at the site. Importantly, for the purposes of entering the same person more than once, there is now a

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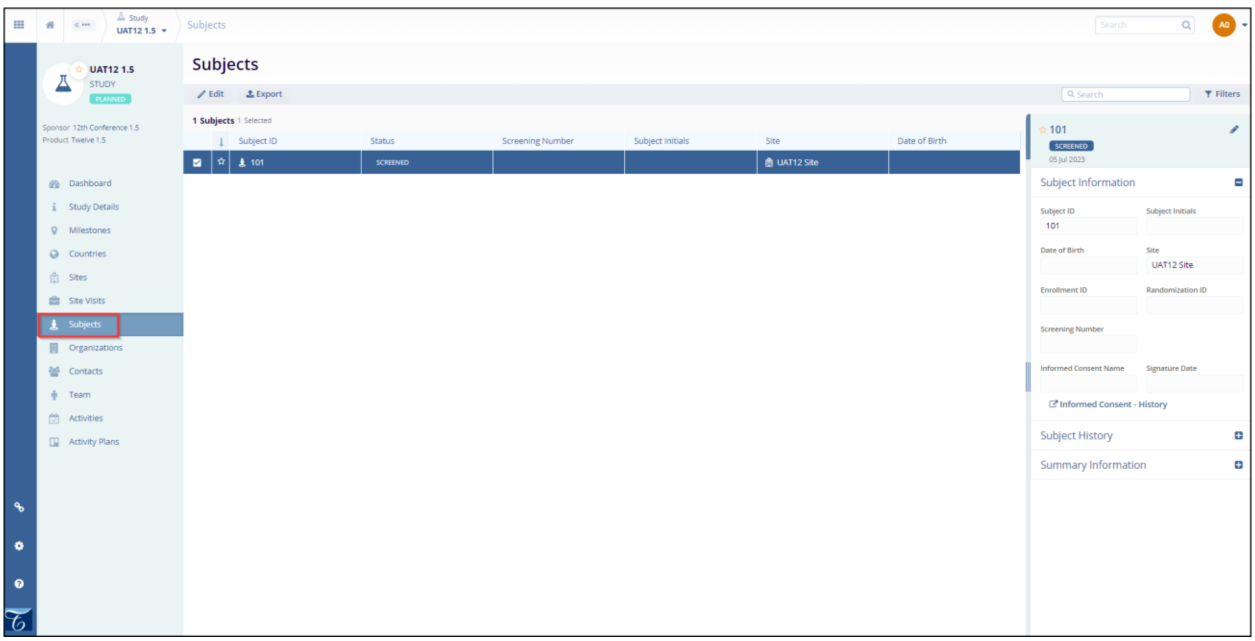
'Copy' option in the menu above the list of site contacts. The system will verify that you intend to create another record for the same person, especially if you are doing so in order to change some detail of their information (for example, someone's last name might have changed).

Reviewing Subjects Within a Study

Note: Subjects is only available if the study is tracking subjects within CTMS. This list will be populated with the current list of subjects for the study.

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
   a. This opens the "Studies" window and study list is displayed.
2. Click on the name of the study whose subjects you wish to review.
   a. The dashboard for the study is displayed.
3. Click on the **Subjects** link in the Navigation menu at the left side of the screen.
   a. This displays all the subjects for the study.



Study Sites Pre-Requisites

The user who is responsible for creating or managing sites in any study should have **CRA** user access. Company administrators will need to assign CREATE, UPDATE, EDIT and DELETE permissions/privileges to users' accounts so that they can perform these steps.

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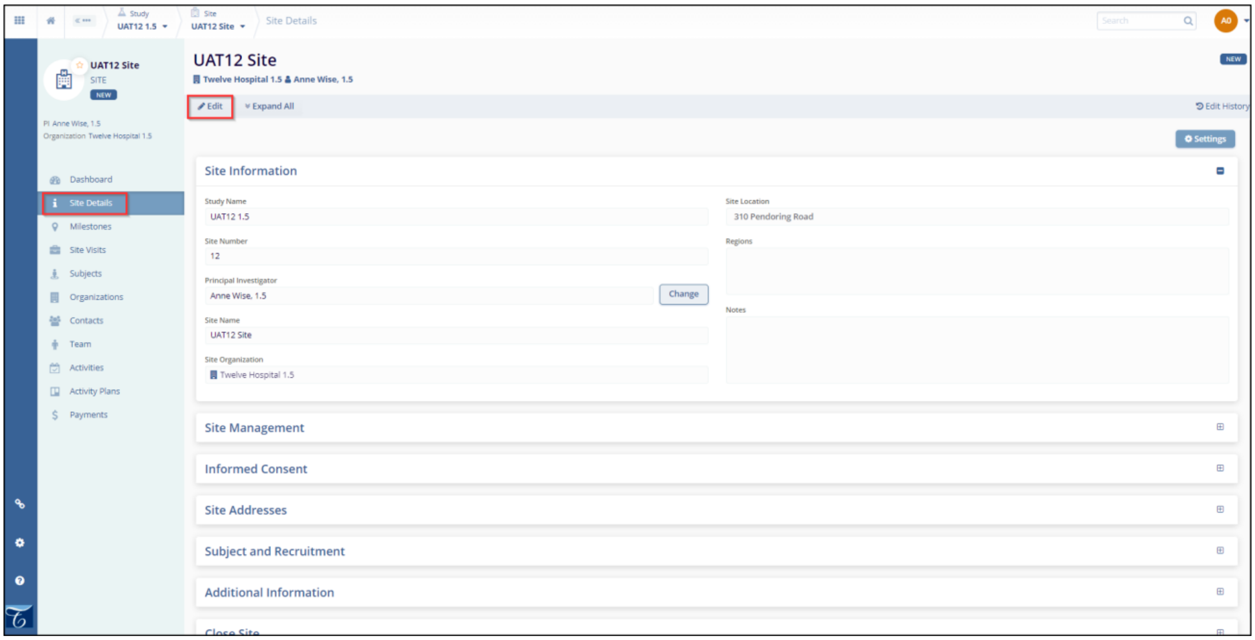
Editing a Site in a Study

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
2. Navigate to the study you want to access.
3. Click on **Sites** in the Navigation menu at the left side of the screen.
    a. This opens the “Study Site” window and study site list is displayed.
4. Click on the name of the site you want to edit.
    a. This opens the dashboard window for the site.
5. Click on **Site Details** in the Navigation menu at the left side of the screen.
    a. This opens the “Site Details” window for the site.
6. Click on the **Edit** button at the top-left of the screen.



7. Make the required changes in the site details window.
8. Click on the **Save** button at the top-left of the screen for the changes to apply.

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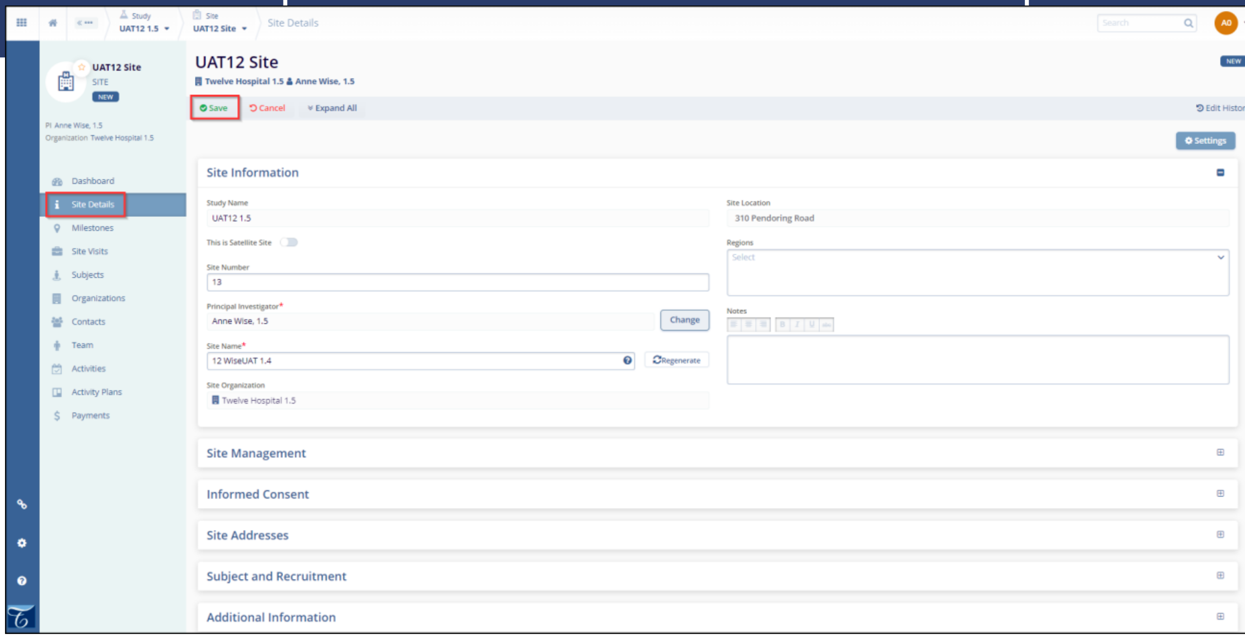

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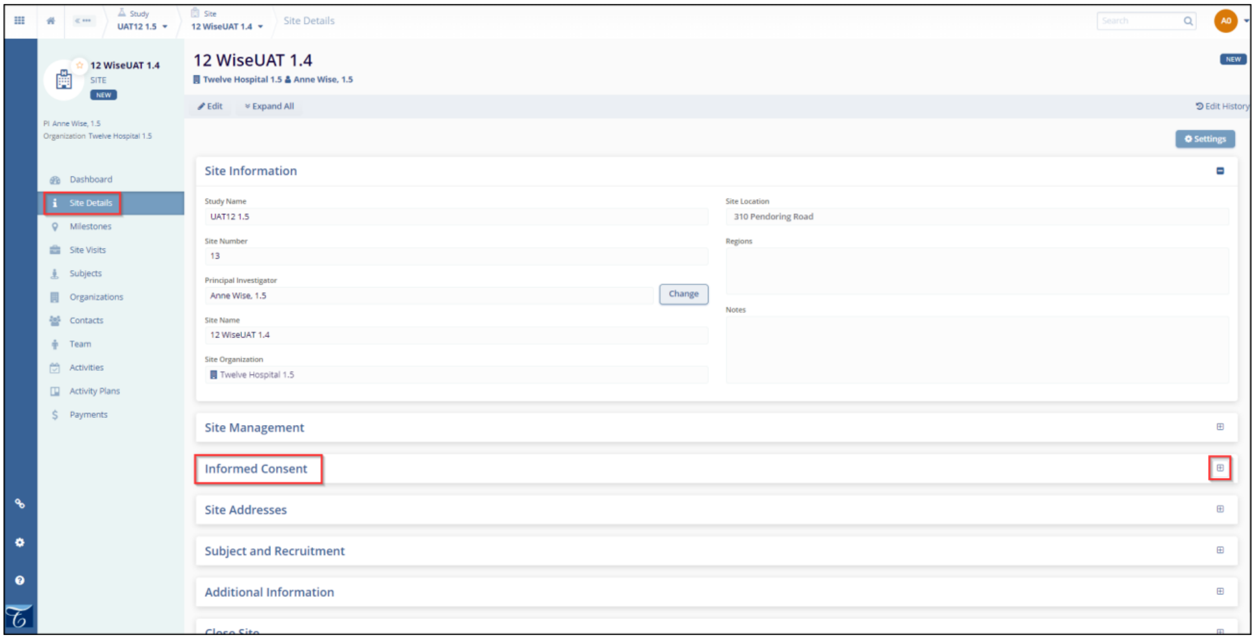
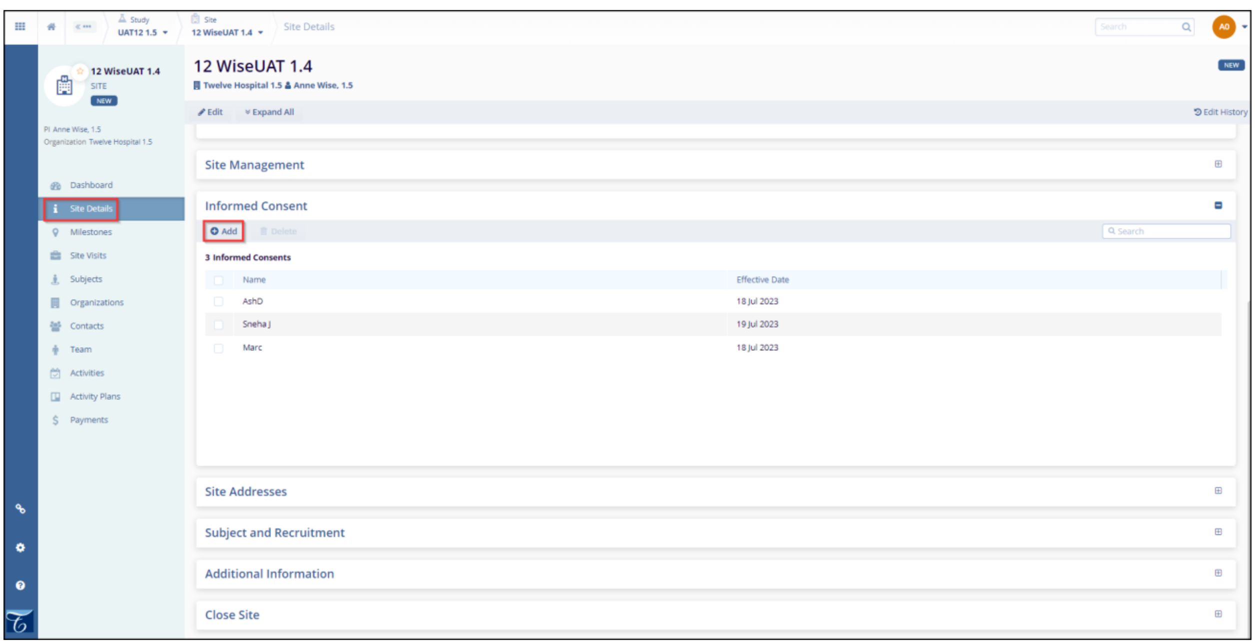
Tracking Informed Consents (ICFs) for a Site

1. Navigate to the Site Details area for the related site.
   a. The necessary steps are found here.
2. Click on the [+] sign next to the Informed Consent to expand that section.



3. Click on the **Edit** button in the top-left of the screen.
4. Click on the **Add** button in the informed Consent section.



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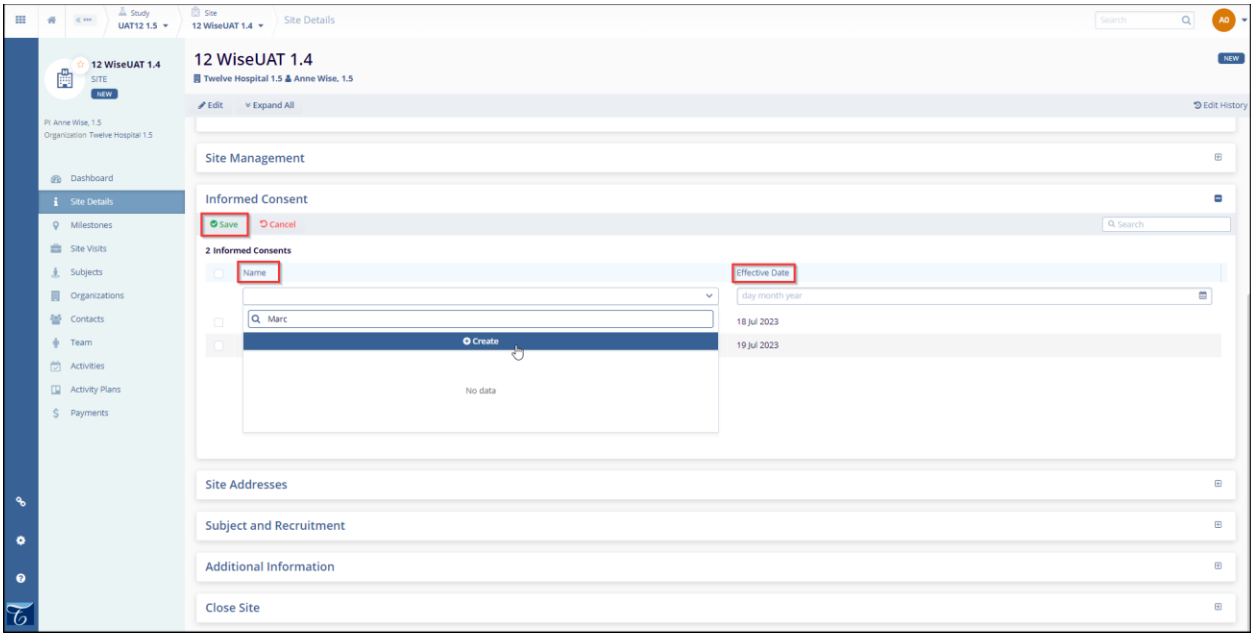
5. Enter site specific **Name** and **Effective Date.**



6. Click **Create**.
7. Click on the **Save** button in the informed consent section to save the record.
   a. This creates site level ICF for the site.

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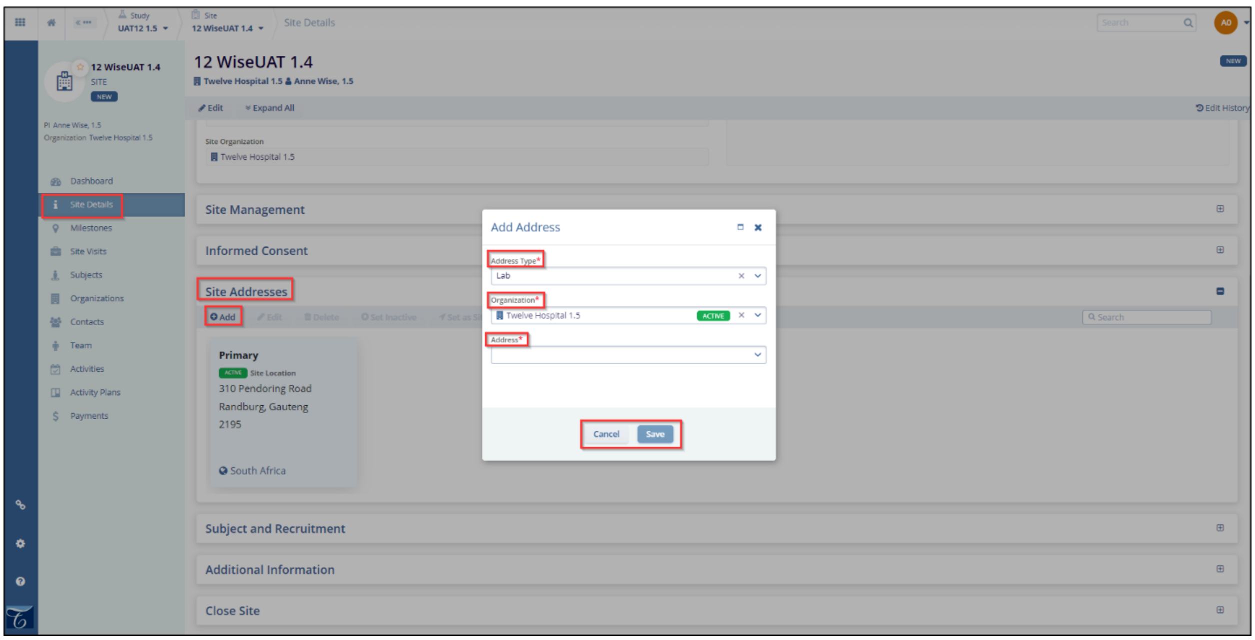
Tracking Site Addresses

1. Navigate to the Site Details area for the related site
   a. The necessary steps are found here.
2. Click [+] next to the site addresses to expand that section.
3. **Site location** within the **site addresses** section is displayed as **primary** address.
4. **Site Location** is listed as a **primary** address for the site.
5. Click on the **Add** button under **Site Addresses** section.
   a. This opens the **Add Address** window.
6. Here we need to enter the mandatory metadata to create an Address i.e., **Address Type, Organization, Address** as indicated by an asterisk (*) symbol next to the field title.
7. Click on the **Save** button.

   Note: Only addresses associated to the selected site organization are available for selection.



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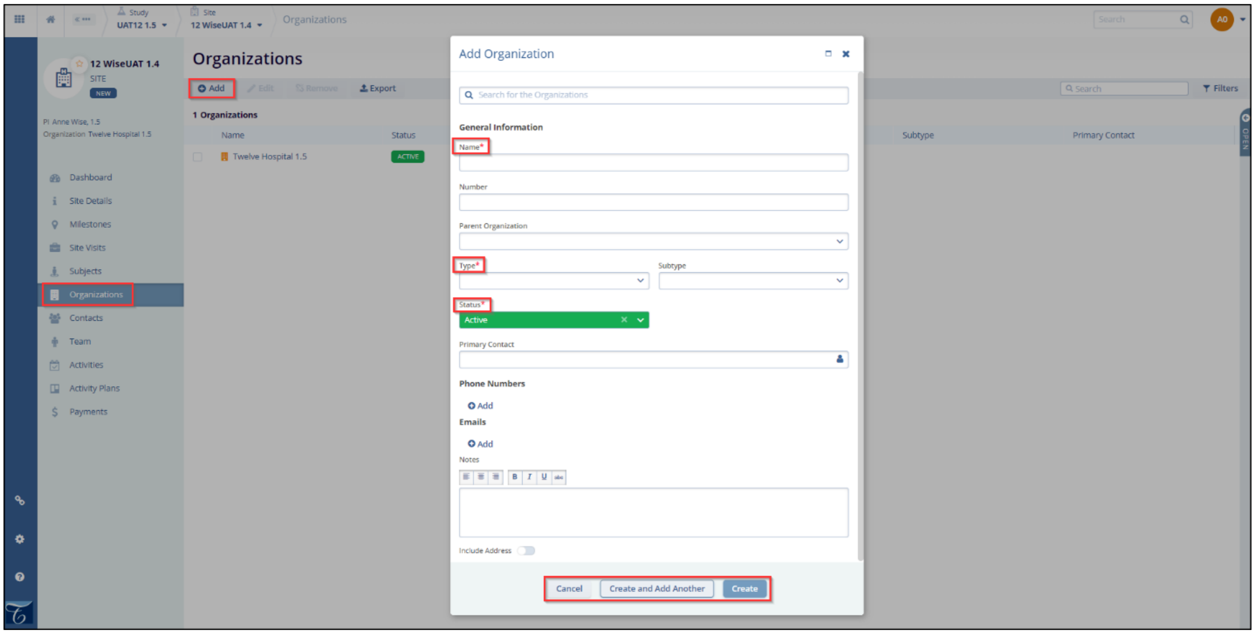
Associating an Organization to a site

1. Navigate to the Site to which you wish to associate an organization.
2. Click on the **Organization** link in the Navigation menu at the left side of the screen.
   a. This opens the “Organization” window.
3. Click on **Add** button at the top-left of the screen.
   a. This opens “Add organization” window.



4. Here we need to fill the required metadata to create an organization with an address.
5. Click on the **Create** button.

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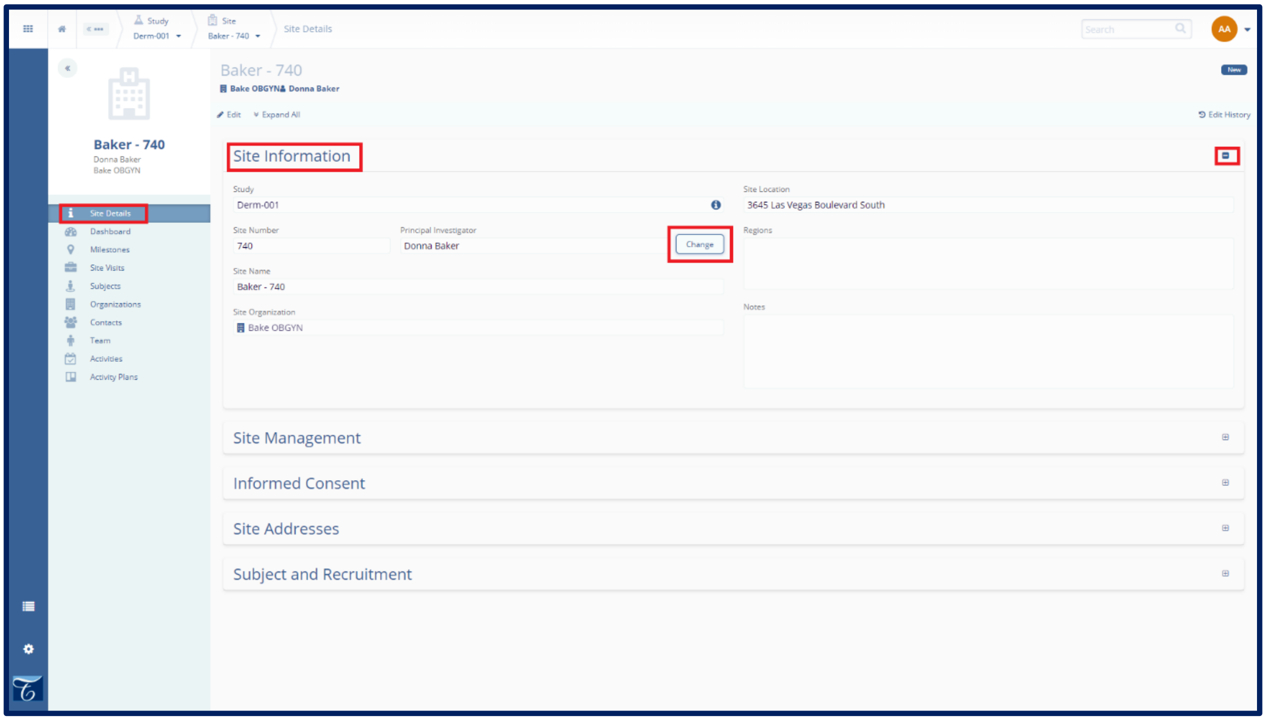
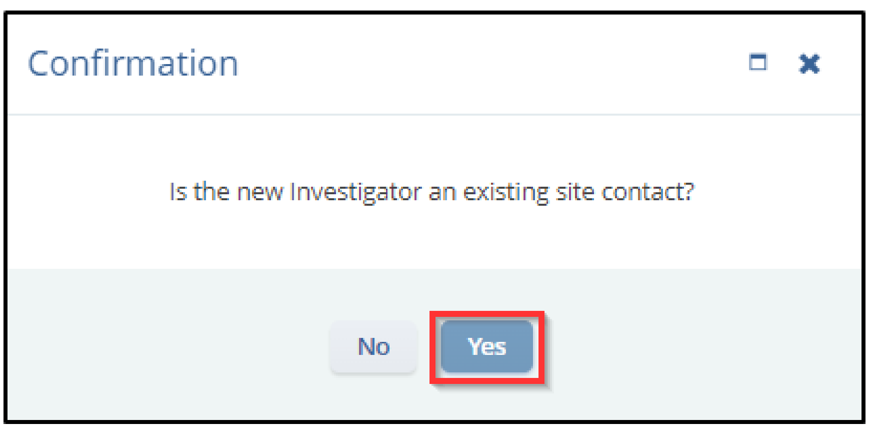
Change of Principal Investigator (PI)

1. Navigate to the Site Details area for the related site.
    a. The necessary steps are found here.
2. Click on the **[+]** sign next to the **Site Information** to expand that section.
3. Click on the **Change** button in the site information section.



4. Confirmation window is popped up, select **Yes** in the confirmation window.
    a. This opens “Change Principal Investigator” window.

Note: Use the search box to find the contact.



5. Click on the **Save** button.

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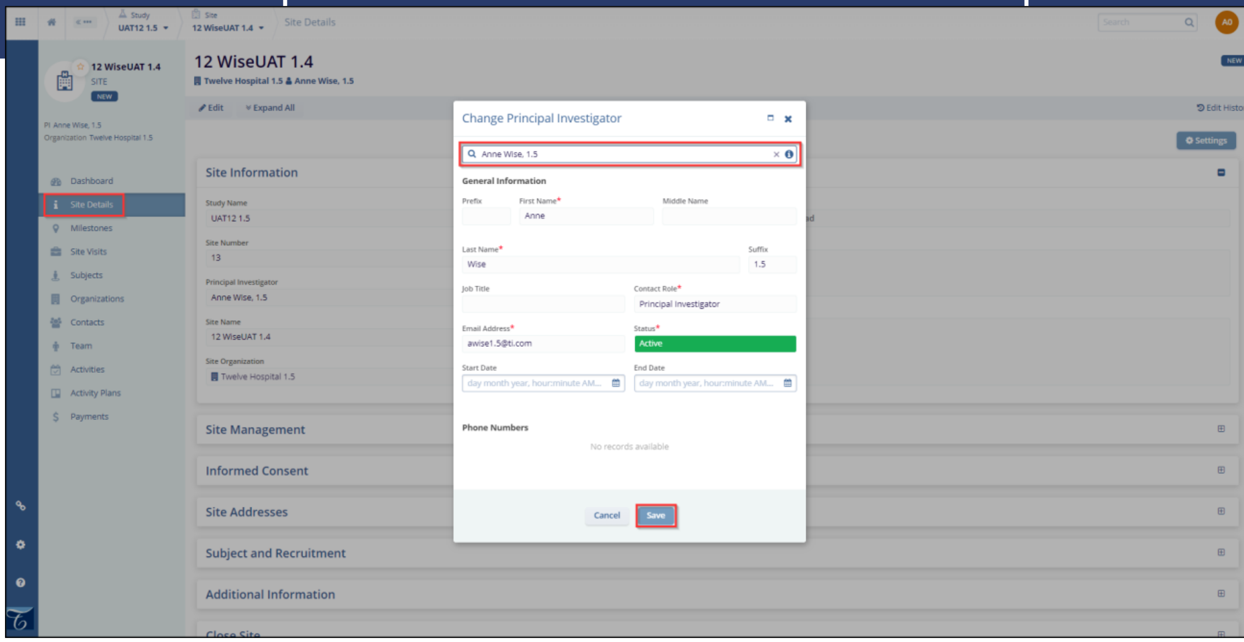
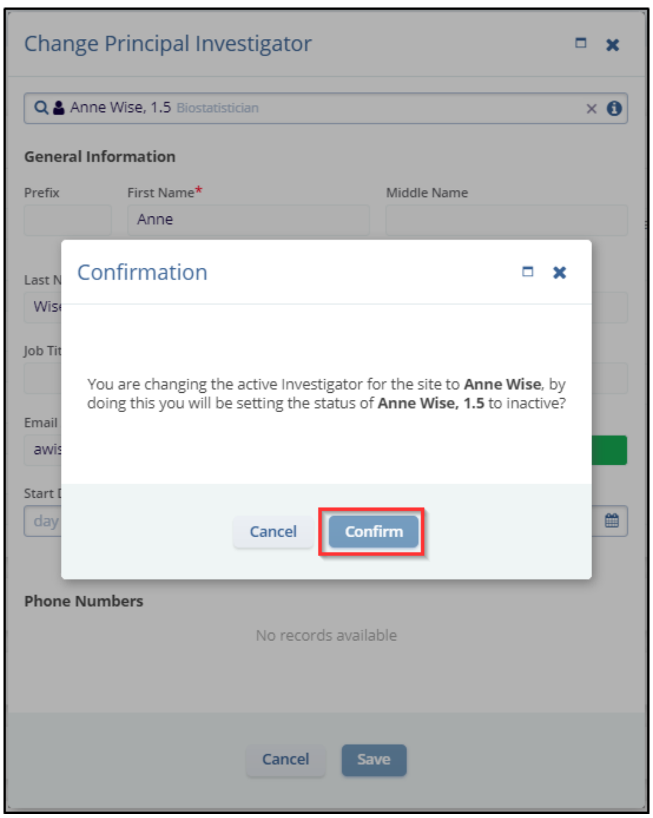


6. Click **Confirm** in the Confirmation popup window to save the changes.



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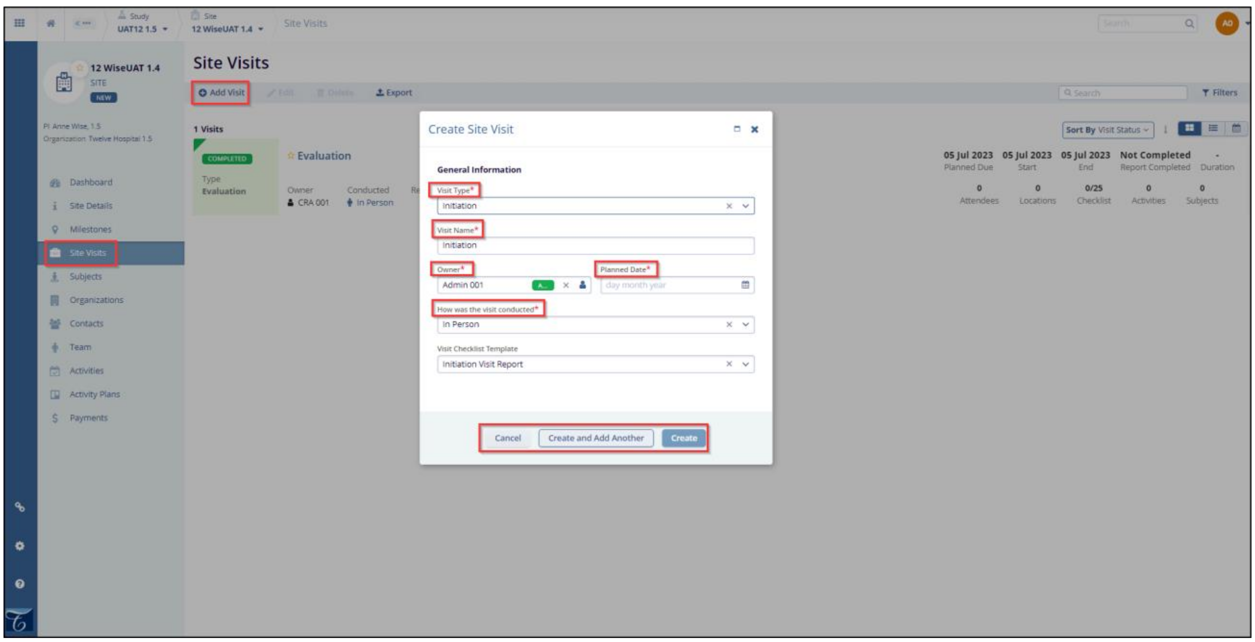
Creating Site Visits

1. Navigate to the site for which you wish to create a site visit.
2. Click on **Site Visits** in the Navigation menu at the left side of the screen.
   a. This opens “Site Visits” window.
3. Click on the **Add Visits** button at the top-left of the screen.
   a. This opens “Create Site Visit” window.
4. Here we need to enter the mandatory metadata to create a Site Visit i.e., **Visit Type, Visit Name, Owner, Planned Date, how was the visit Conducted** as indicated by an asterisk (*) symbol next to the field title.
5. If any of the required fields are missing, an error will appear when we click on the **Create** button, displaying the fields which need to be filled to create a Site Visit successfully.
6. Finally, before clicking **Create,** verify all the fields are entered correctly in the create Site Visit window.
   a. **Create Site Visit** window closes, and site visit record is created and displayed in the list.
7. (Optional) Click **Create** or **Create and Add Another** depending on whether you intend to create another Site Visit right away.



Updating a Site visit

1. Navigate to the site whose visit you need to update.

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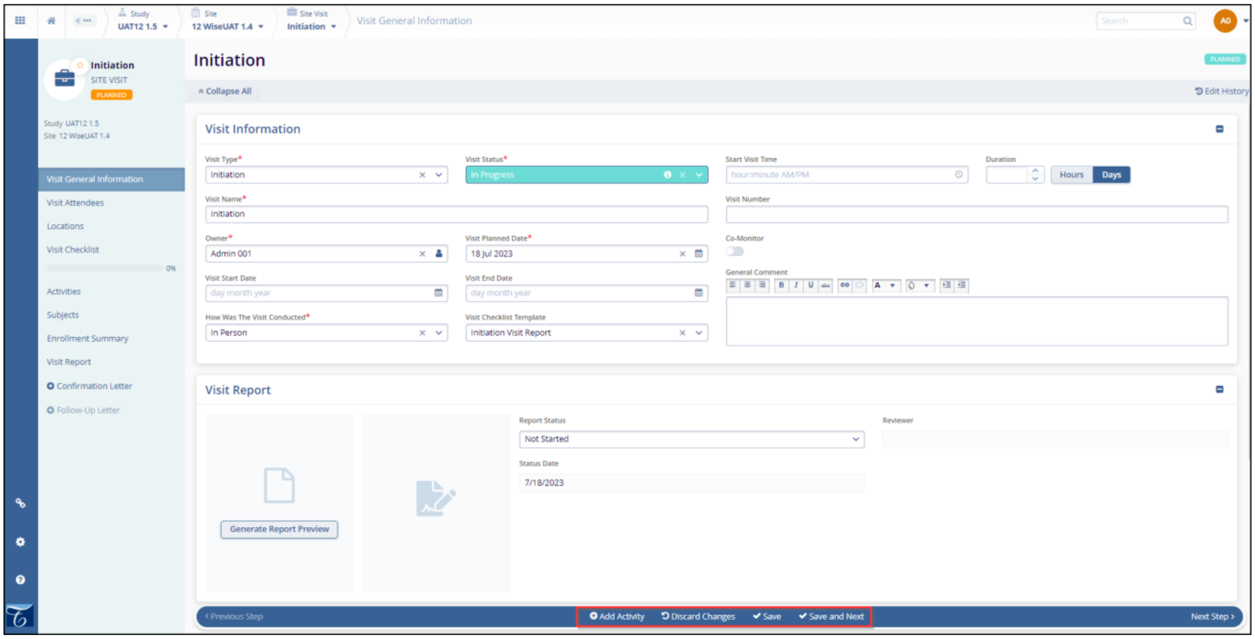
2. Click on the **Site Visits** in the Navigation menu at the left side of the screen.
   a. This opens “Site Visits” window.
3. Navigate to the Site Visit record you want to update and click on the visit name.
   a. This opens “Visit General Information” window.
4. Make the required changes in this window for the site visit.
5. Click on the **Save** button which is at the bottom of the screen.



Tracking Subjects

1. Navigate to the site whose subjects you wish to track.

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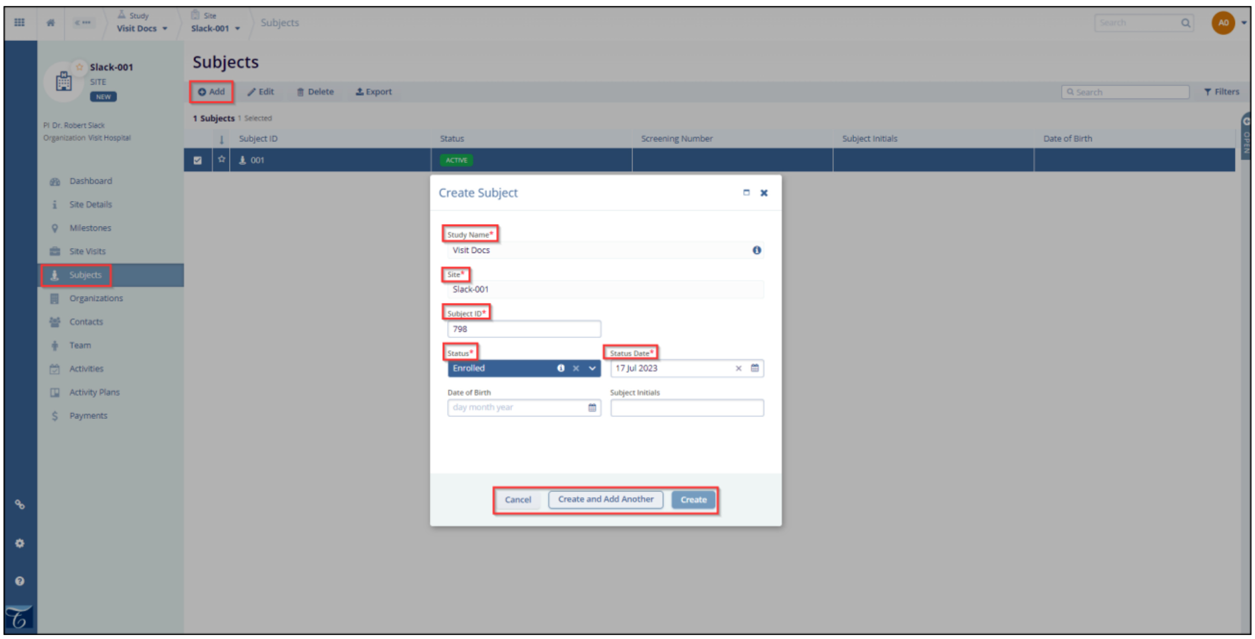
2. Click on **Subjects** in the Navigation menu at the left side of the screen.
   a. This opens the “Subjects” window.
3. Click on the **Add** button at the top-left of the screen.
   a. This opens **Create Subject** window.
4. Here we need to enter the mandatory metadata to create a Subject i.e., **Study Name**, **Site**, **Subject ID, Status, Status Date** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
5. If any of the required fields are missing, an error will appear when we click on the **Create** button, displaying the fields which need to be filled to create a subject successfully.
6. Finally, before clicking **Create**, verify all the fields are entered correctly in the create subject window.
   a. **Create Subject window** closes, subject record is created and displayed in the list.
7. (Optional) Click **Create** or **Create and Add Another** depending on whether you intend to create another subject right away.

Note: Subjects will not be displayed for navigation when Subject Tracking is turned off within Study > Settings for the study.



Editing a Subject

1. Navigate to the site whose subject requires editing.
2. Click on the **Subjects** in the Navigation menu at the left side of the screen.
   a. This opens the “Subjects” window.

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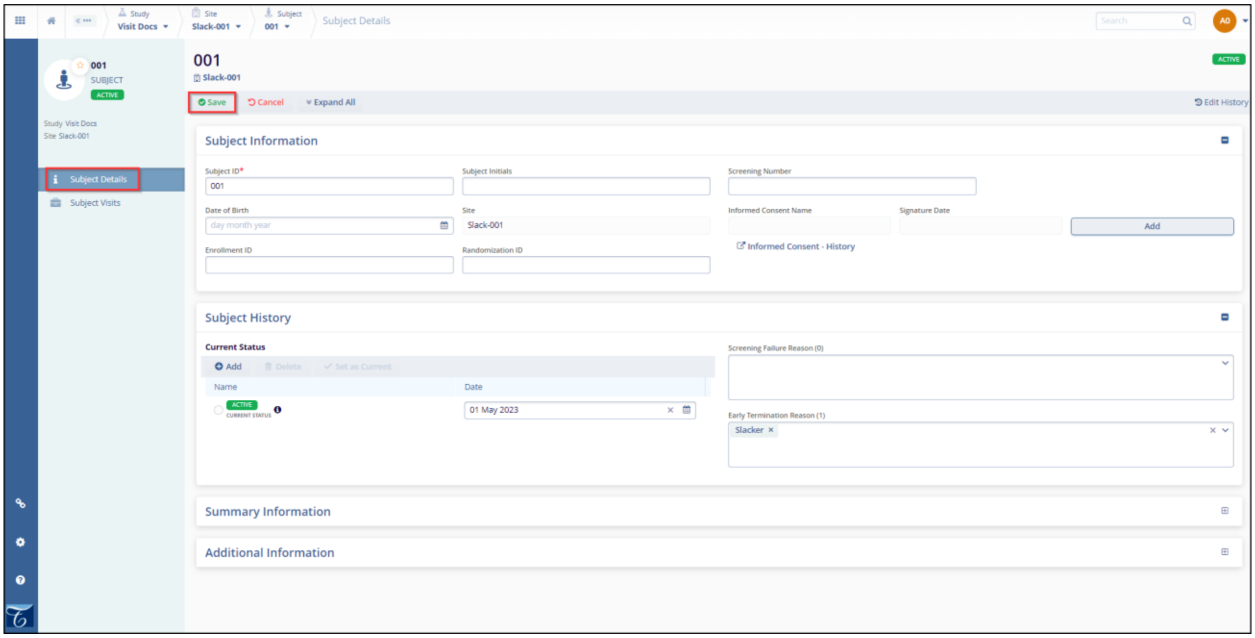
3. Click on the checkbox before the Subject name.
   a. A quick view panel will display on the right side of the screen.
4. Now, click on the **Edit** button (pencil icon) in the top-right of the screen.
   a. This opens the “Subject Details” window.
5. Make any necessary changes to the subject information.
6. Click on the **Save** button at the top-left of the screen.



Tracking Subjects Visits

1. Navigate to the site in question.
2. Click on the **Subjects** in the Navigation menu at the left side of the screen.
   a. This opens the “Subjects” window.

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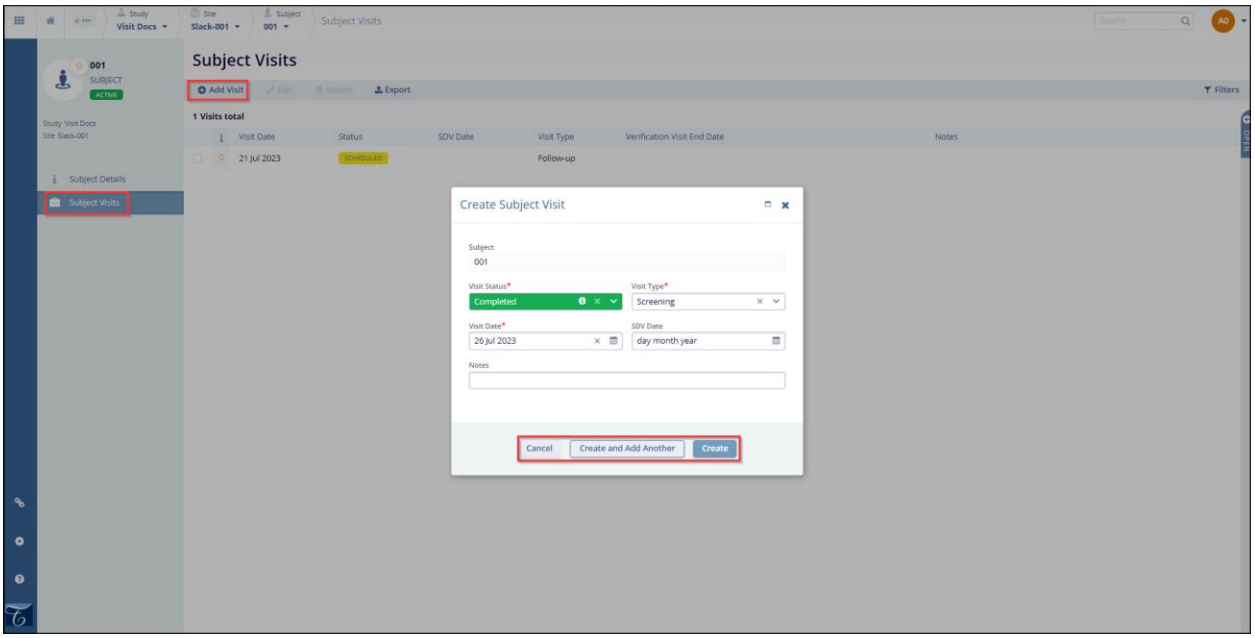
3. Navigate to the subject name you want to access and click on it.
4. Click on the **Subjects Visits** in the Navigation menu at the left side of the screen.
   a. This opens “Subject Visits” window.
5. Click on the **Add Visit** button in the top-left of the screen.
   a. This opens **Create Subject Visit** window.
6. Here we need to enter the mandatory metadata to create a subject visit i.e., **Visit Status, Visit Type, Visit Date** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
7. If any of the required fields are missing, an error will appear when we click on the **Create** button, displaying the fields which need to be filled to create a subject successfully.
8. Finally, before clicking **Create**, verify all the fields are entered correctly in the create subject visit window.
   a. Create Subject Visit window closes, subject visit record is created and displayed in the list.
9. **(Optional)** Click **Create** or **Create and Add Another** depending on whether you intend to create another subject visit right away.



Editing a Subject Visit

1. Navigate to the site whose visit needs to be edited.
2. Click on the **Subjects** in the Navigation menu at the left side of the screen.
   a. This opens the “Subjects” window.
3. Navigate to the subject name you want to access and click on it.
4. Click on the **Subjects Visits** in the Navigation menu at the left side of the screen.
   a. This opens “Subject Visits” window.

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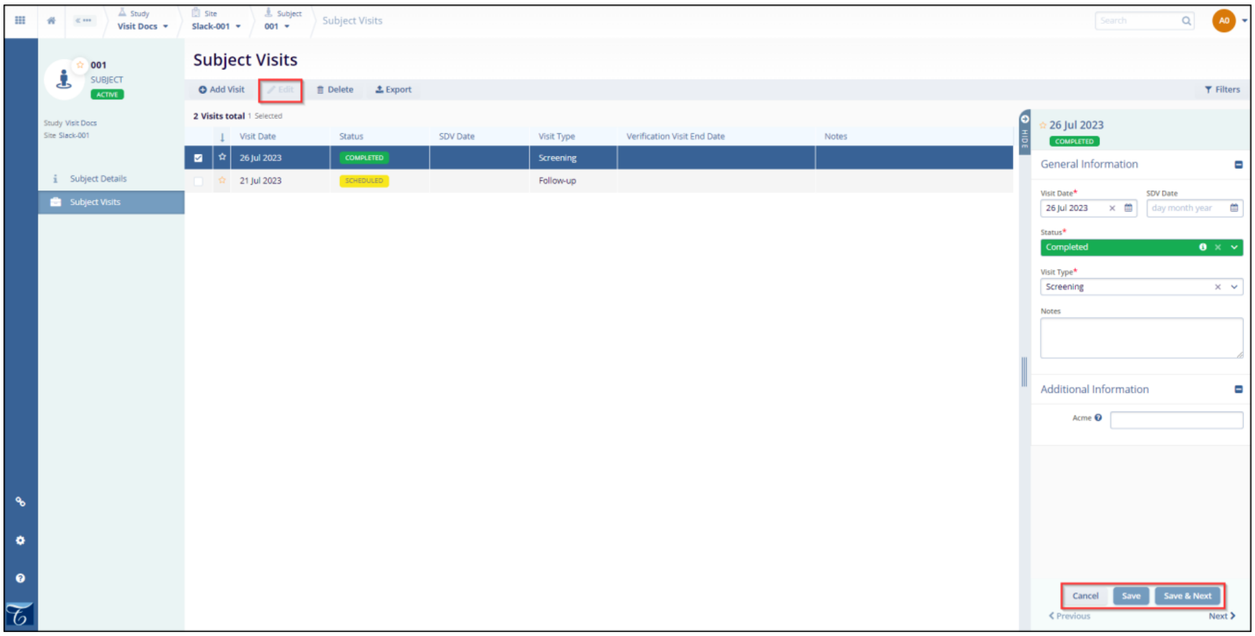
5. Navigate to the Subject visit record you want to edit and click on the checkbox before the Subject visit name.
   a. A quick view panel will display on the right side of the screen.
6. Now, click on the **Edit** button (pencil icon) in the top-right of the screen.
7. A quick view panel is open on the right side. Make any necessary changes to the subject visit information.
8. Click on the **Save** button in the right bottom of the screen.



Reviewing and Tracking Country Details

1. Navigate to the country whose details you wish to edit.
   a. This can be done via the navigation menu at the left side of the screen.
2. Navigate to the country in the list you want to edit and click on it.
   a. This opens the dashboard for the country.
3. Click on the **Country Details** in the Navigation Menu at the left side of the screen.
   a. This opens the "Country Details" window.

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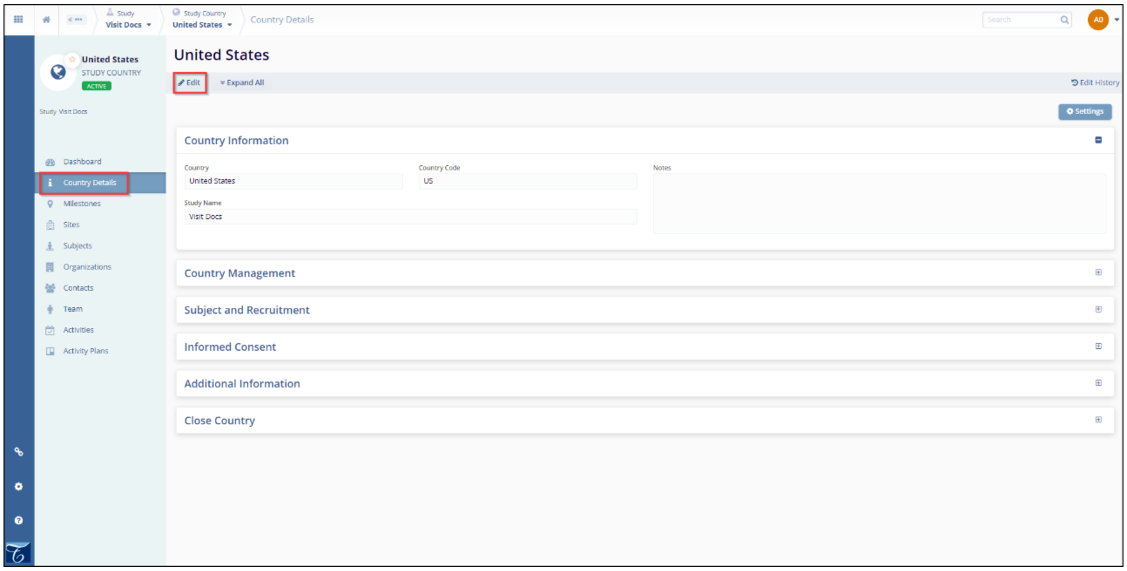
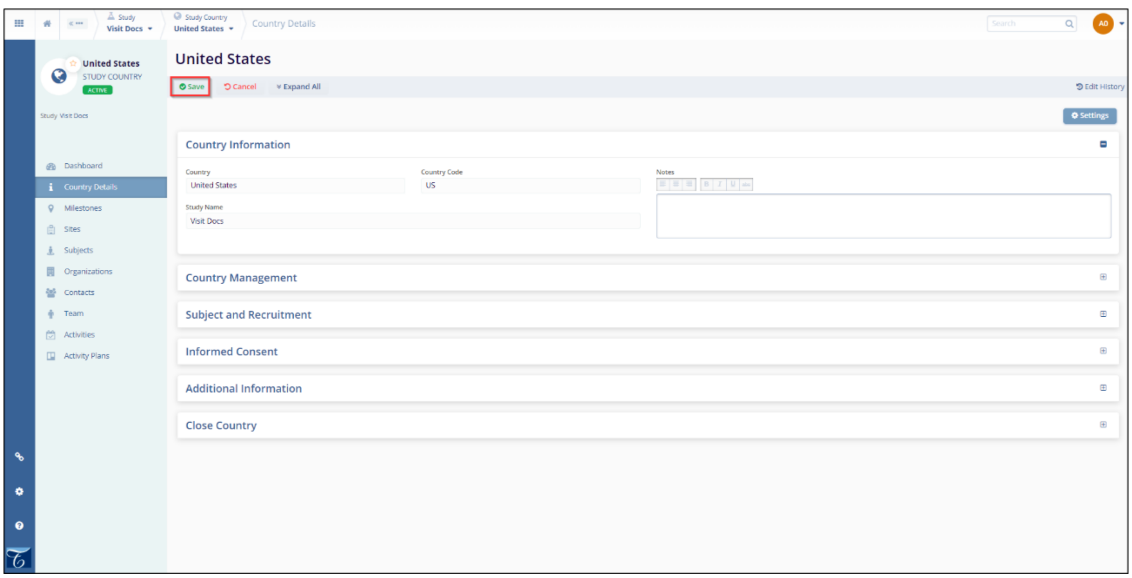
4. Navigate to the section you want to review in the screen and click on the **[+]** sign next to the name to expand it.
5. Click on the **Edit** button on the top-left of the screen to make any changes and before returning, click on the **Save** button for the changes to apply.





Tracking Country Informed Consents (ICFs)

1. Click on **Countries** in the Navigation menu at the left side of the screen.
2. Navigate to the country in the list you want to edit and click on it.
   a. This opens the dashboard for the country.
3. Click on the **Country Details** in the Navigation Menu at the left side of the screen.
   a. This opens the "Country Details" window.
4. Click on the **[+]** sign next to the informed Consent to expand the section.

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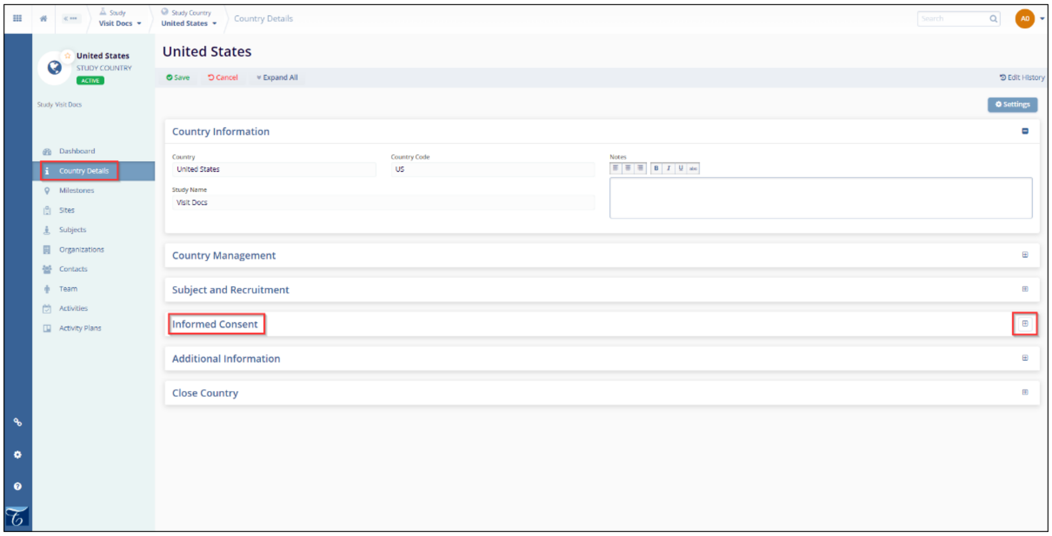
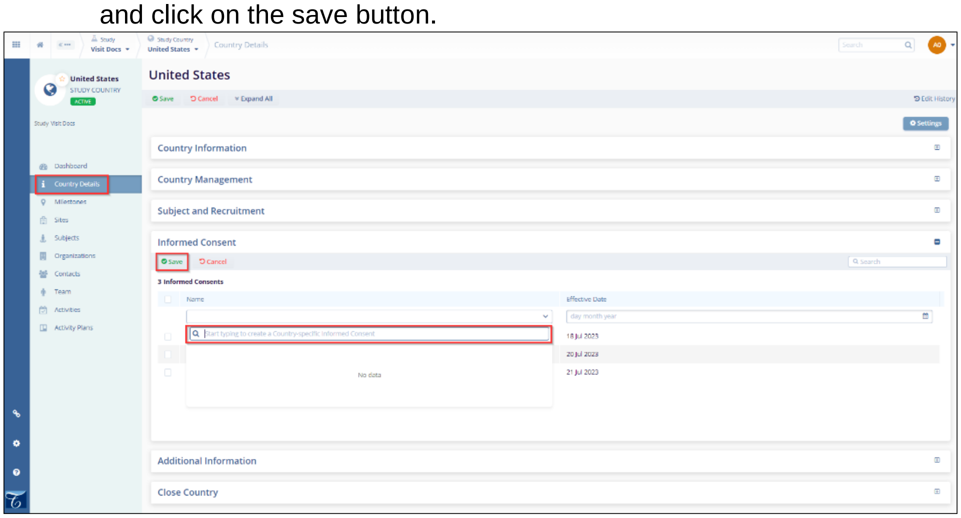
5. Click on the **Add** button in the informed consent section.
6. Click on the dropdown in the **Name** field.
   a. Study level ICF is displayed and a country specific ICF can be created.



7. Select the study ICF from the list and click on the **Save** button in the informed consent section.
8. You can add country level ICF by adding name and effective date in the informed consent section and click on the save button.



Creating Site within a Country

1. Click on **Countries** in the Navigation menu at the left side of the screen.
2. Navigate to the country in the list you want to edit and click on it.
   a. This opens the dashboard for the country.
3. Click on the **Sites** link in the Navigation menu at the left side of the screen.
4. Click on the **Add** button in the top-left of the screen.
   a. This opens the “Create Site” window.
5. Fill in the required information and click **Create**.

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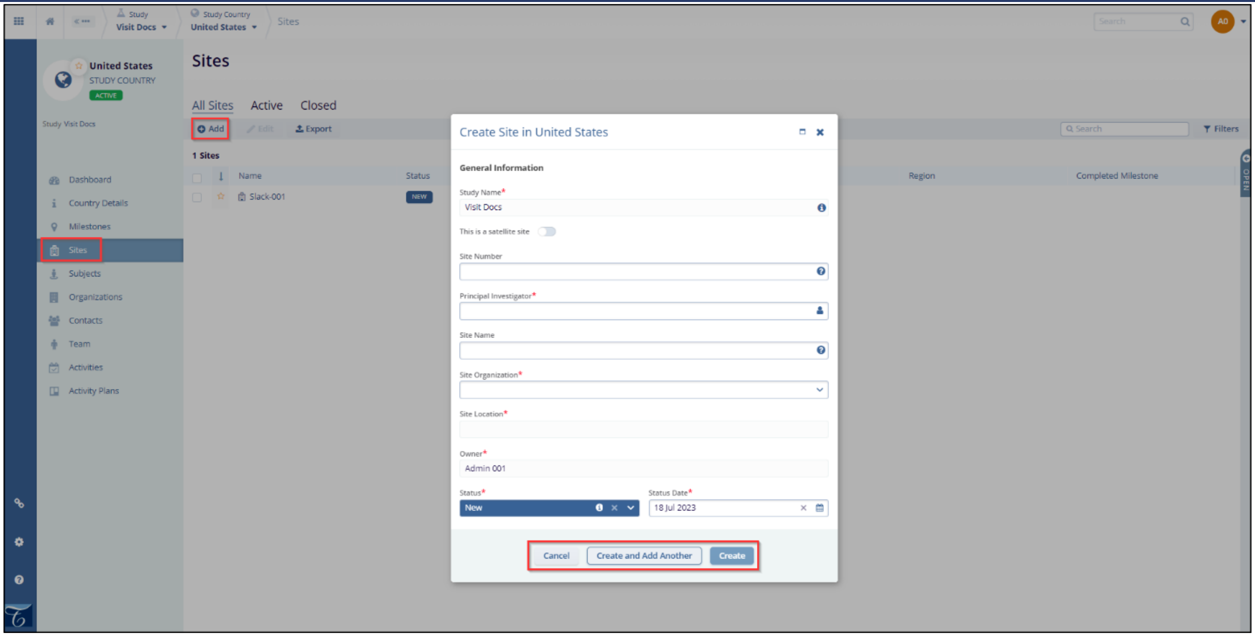
   a. More detailed instructions regarding this step can be found here.



Associating an Organization with a Country

1. Select **Countries** from the menu at the left side of the screen.
2. Click on the name of the country to which you wish to associate an organization.
3. Click on the **Organizations** link in the Navigation menu at the left side of the screen.
4. This open the organization window, and organization list is displayed.
5. Click on the **Add** button in the top-left of the screen.
   a. This opens Add Organization window.
6. Search for an Organization or create a new one if necessary.
   a. More detailed instructions for this step may be found here.

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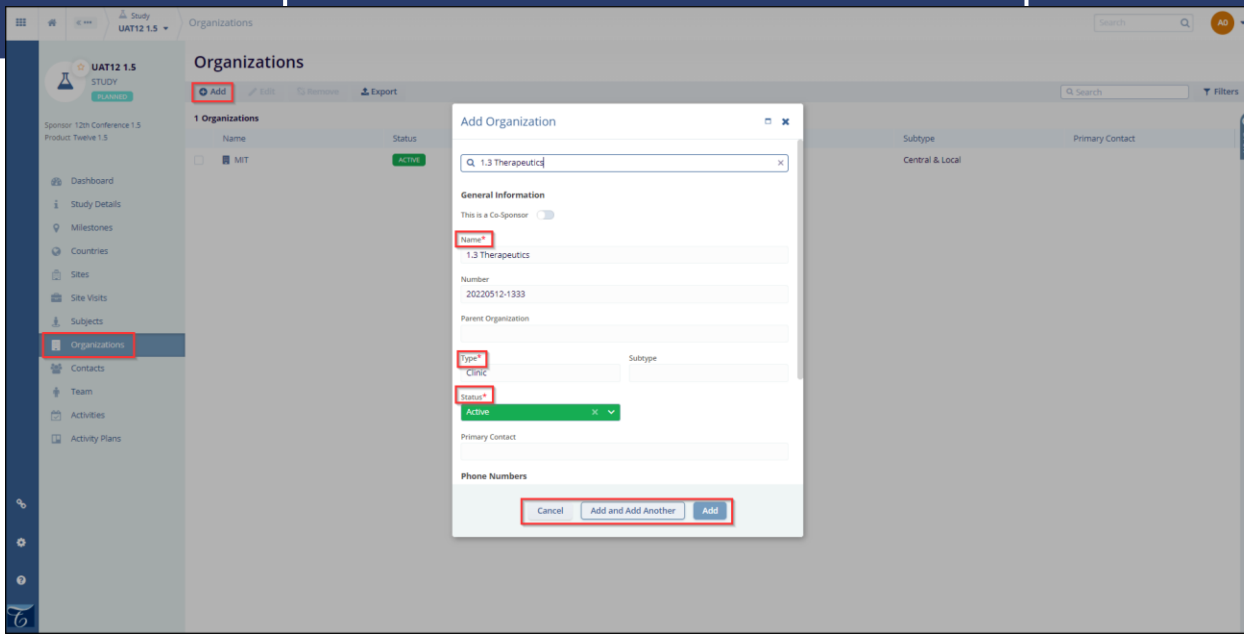

Associating Contacts with a Country

1. Navigate to the country to which you wish to associate a contact.
2. Click on the name of the country to which you wish to associate a contact.
3. Click on the Contacts link in the Navigation menu at the left side of the screen.
    a. This opens the “Contacts” window, and contacts list is displayed.
4. Click on the **Add** button in the top-left of the screen.
    a. This opens the “Create Contact in Country" window.

Note: Search field can be used to locate and select existing CTMS contacts.

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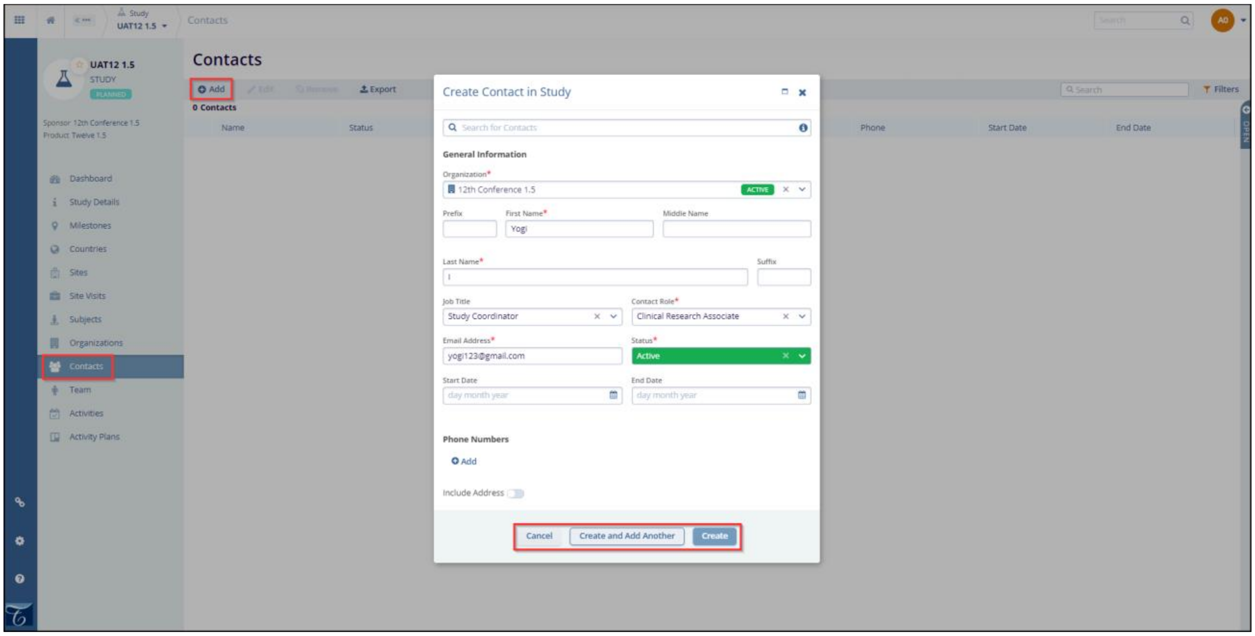
5. Here we need to enter the mandatory metadata to create a contact i.e., **Organization, First Name, Last Name, Contact Role, Email Address, Status,** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
6. If any of the required fields are missing, an error will appear when we click on the **Create** button, displaying the fields which need to be filled to create a contact successfully.
7. Finally, before clicking **Create**, verify all the fields are entered correctly in the create contact window.
8. Create contact in country window closes, contact record is created and displayed in the list.
9. (Optional) Click **Create** or **Create and Add Another** depending on whether you intend to create another contact right away.



Integrated Payments View

TI CTMS has the ability for a user to review high-level payment details when an integration has been established between TI CTMS and an external payments system. The integration is view-only in the CTMS and any modifications still need to be made within the originating payment system.

Having access to high-level summary payment details allows users to provide timely responses to customers and sites regarding payments without additional navigation to payment-related systems. Users requiring additional payment-related details and reports can utilize the payment system link within TI CTMS to quickly navigate to the payment system and perform all payment-related tasks. Follow the steps below to view the payments related information.

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
2. Navigate to the study you want to access.

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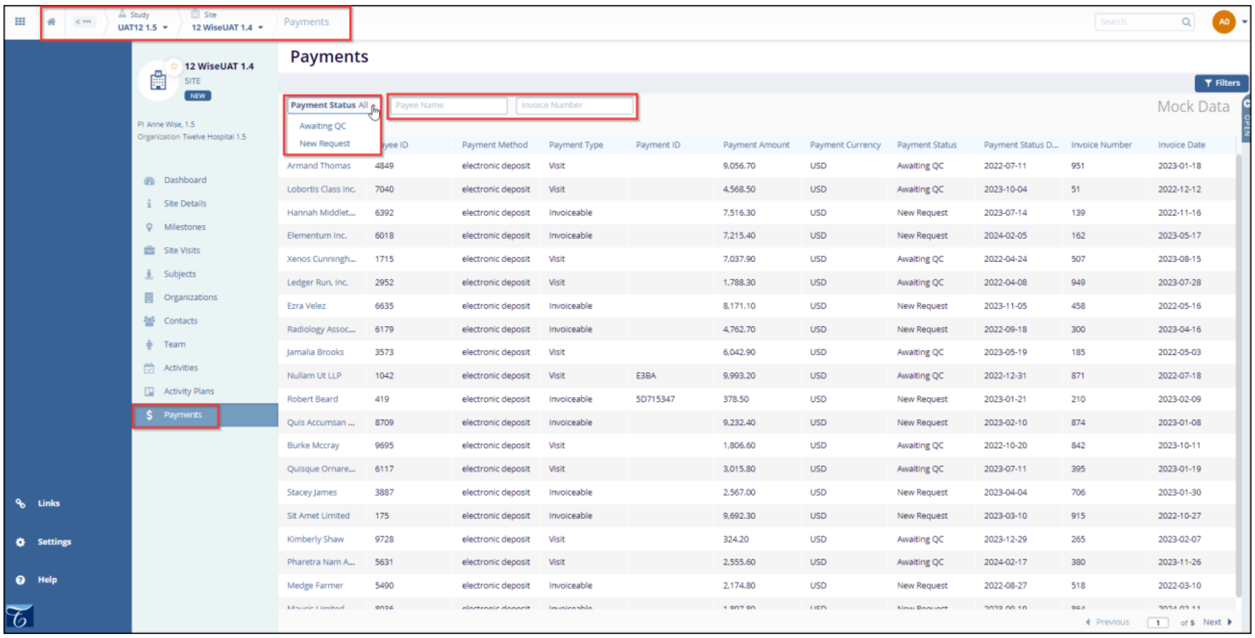
3. Click on **Sites** in the Navigation menu at the left side of the screen.
   a. This opens the "Study Site" window and study site list is displayed.
4. Click on the name of the site you want to view the payments.
   a. This opens the dashboard window for the site.
5. Click the **Payments** link displayed in the left side of the screen.
   a. This opens the Payments window in the center of the screen.
6. The user can apply filters to view the required payments for 'Awaiting QC' and 'New Request'.
7. The user can also search for a payment 'Payee Name' and 'Invoice Number'. Refer to the screenshot below.



Closing a Site

With the ability to indicate final statuses naturally comes the action of closing a site. Because an entity which hits a final status cannot be brought back to an earlier status without administrator assistance, we need to take care that the site is ready to be closed before the status can be successfully applied.

Once a site's status has been set to its penultimate status, whether that be 'Closeout' or 'Ready to Close' or something similar, the ability to close a site will become active. At the bottom of the Site Details area is now a 'Close Site' block with a red button labeled 'Close Site.'

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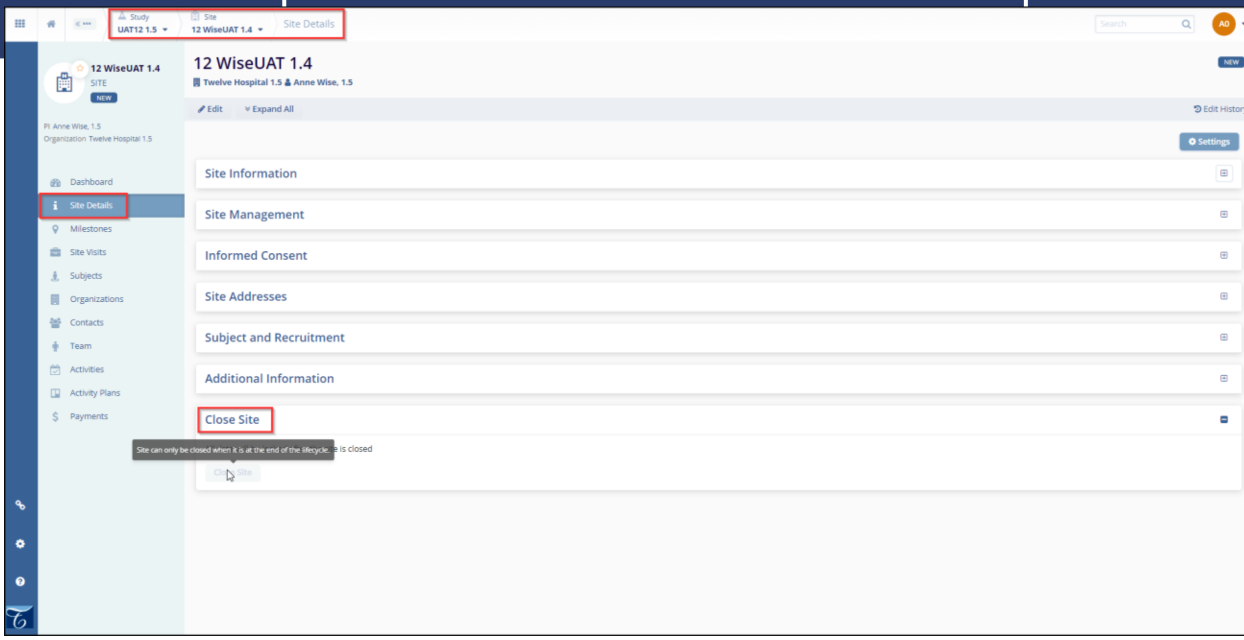

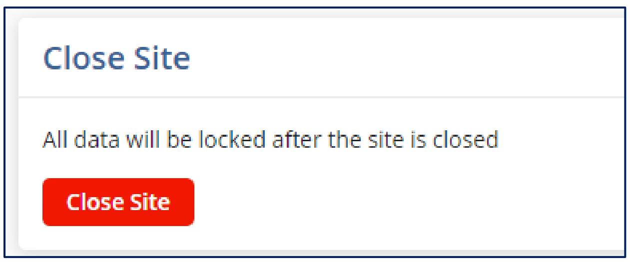

Once that button is pressed, a Site Health Card window is displayed indicating the completion status of the site-related Milestones, Site Visits, Subjects, Activities, and Activity Plans. This gives the user a chance to locate and deal with any unresolved items before they become locked.

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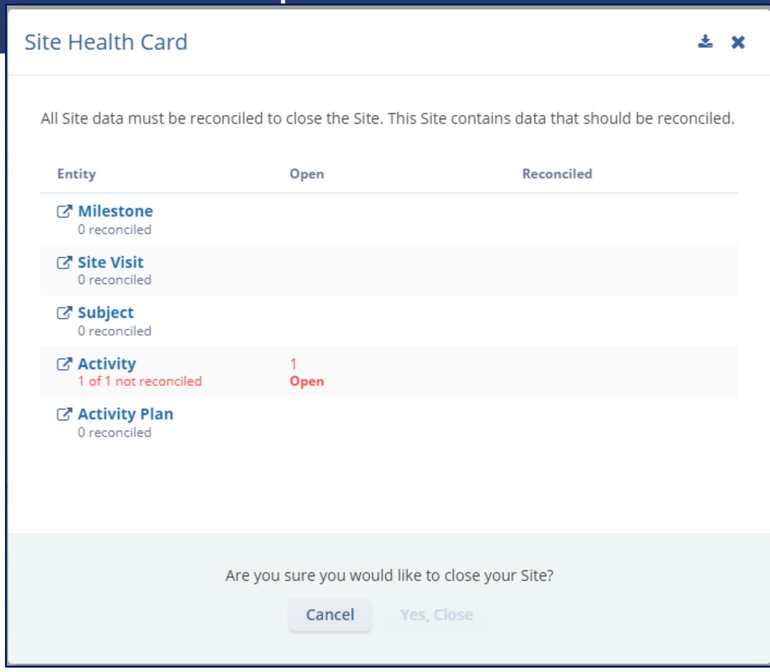

Once all of the items are resolved, and nothing is left undone, the '**Yes, Close**' button is activated and the site can be closed.

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Site Visit Documentation

Site visits and can be set up so that they trigger specific site-related events directly in an associated eTMF room. This can include generating placeholders for required documentation associated with the site. For more information about configuring your CTMS to work with Trial Interactive's eTMF solution, please reach out to your Trial Interactive representative.

Pre-Requisite

The user who is responsible for creating and managing **Site Visit Documentation** in an **Organization** must have **Clinical Regulatory Associate** user access.

Unblinded users will have the right to create unblinded site visits and related documentation which will only be visible to other unblinded personnel.

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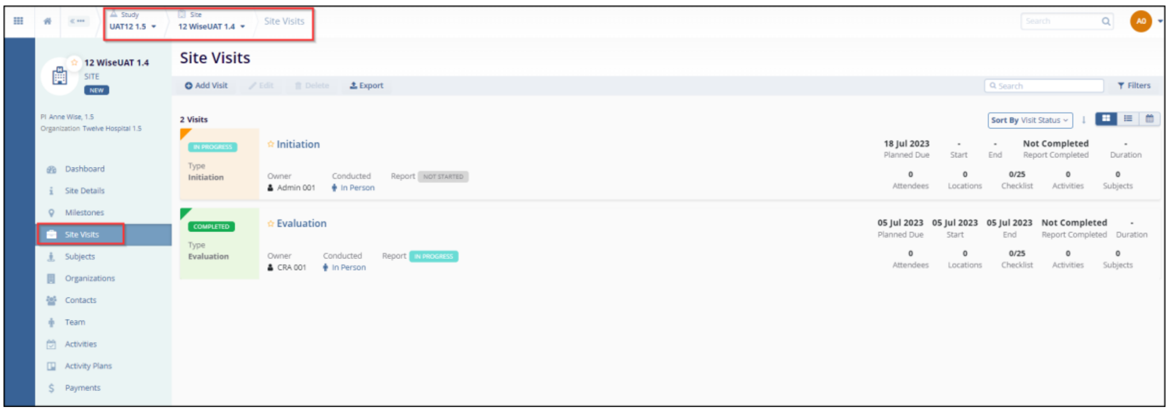
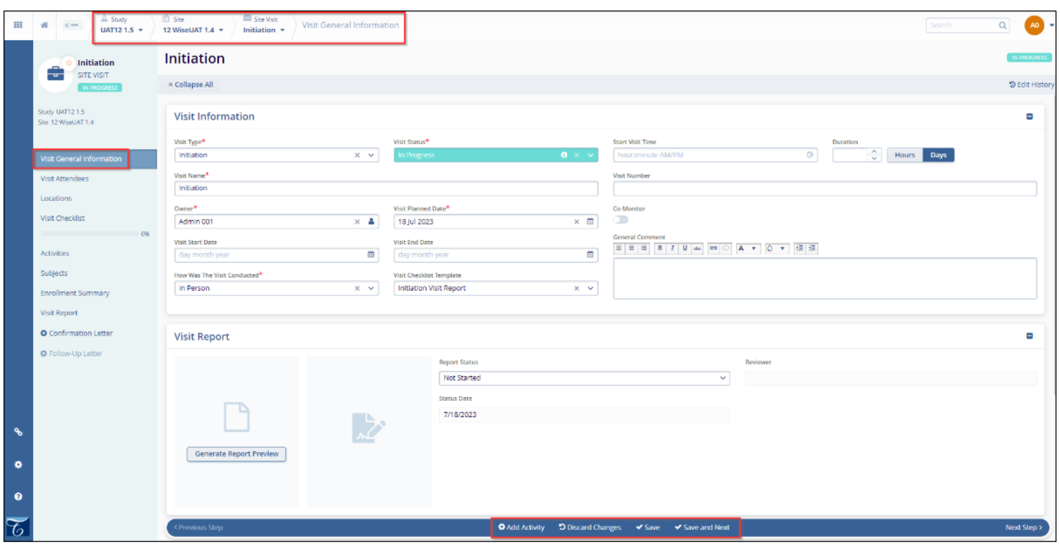
Navigation to Site Visit

1. Click on the **Studies** link in the Navigation menu in the panel at the left side of the screen.
   a. This opens the “Studies” window.
2. Navigate to the Study you want to review site visits for and click on the name field.
   a. This opens the dashboard for the study.
3. Click on the **Sites** link in the Navigation menu at the left side of the screen.
   a. This opens the “Sites” window.
4. Navigate to the site you want to review site visit for and click on the Name field value.
   a. This opens the dashboard for site.
5. Click on the **Site Visits** in the Navigation menu in the panel at the left side of the screen.
   a. This opens the “Site Visits” window.



6. Navigate to the Visits you want to review and click on it.
   a. This opens the **Visit General Information** window.
7. Review the site visit information and make any necessary changes if required and click on the **Save** button in the bottom of the screen, for the changes to apply.



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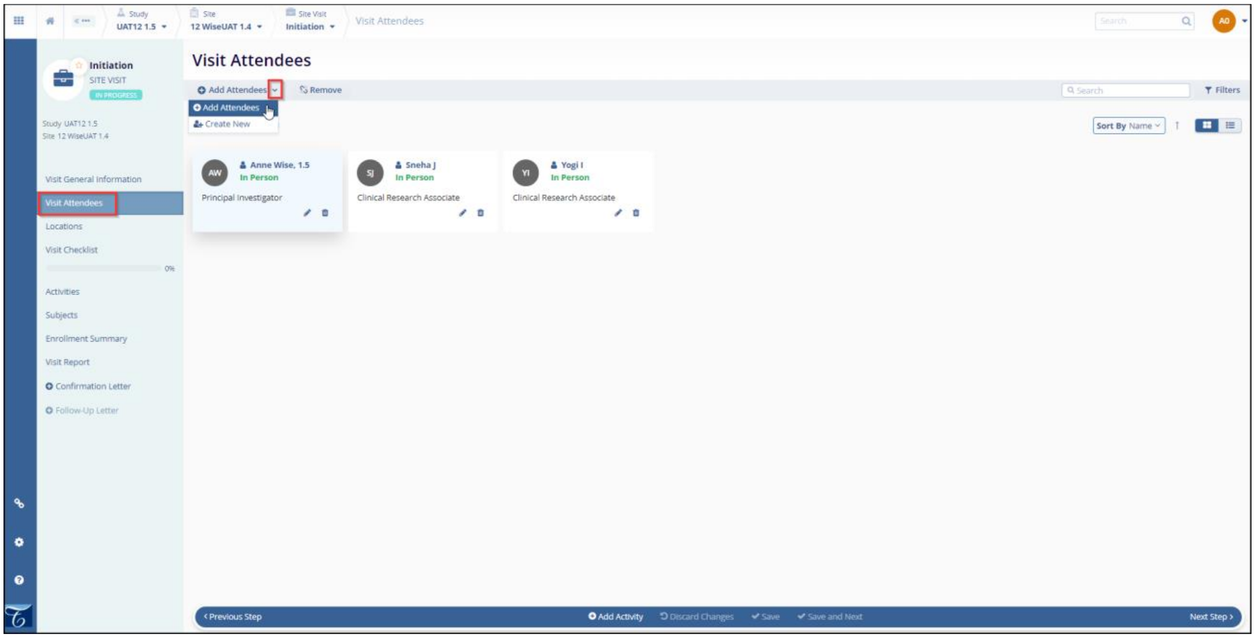
Site Visit Attendees

1. Navigate to the Site Visit area for the related site.
   a. More detailed instructions on this step can be found here.
2. Click on the **Visit Attendees** link in the Navigation menu at the left side of the screen.
   a. This opens the “Visit Attendees” window.
3. Click on the **Add Attendee** button in the top-left of the screen.



4. Click on the **Add Attendee** from the dropdown of “Add Attendee” button.
   a. This opens the “Add Attendees” window.
5. Select an existing site contact and click on **Add** button in the bottom of the Add Attendees window.
   a. **Attendee** is added to the visit report and the “Add Attendees” window is closed.

Note: Clicking **Create New** will create a new/additional site contact.

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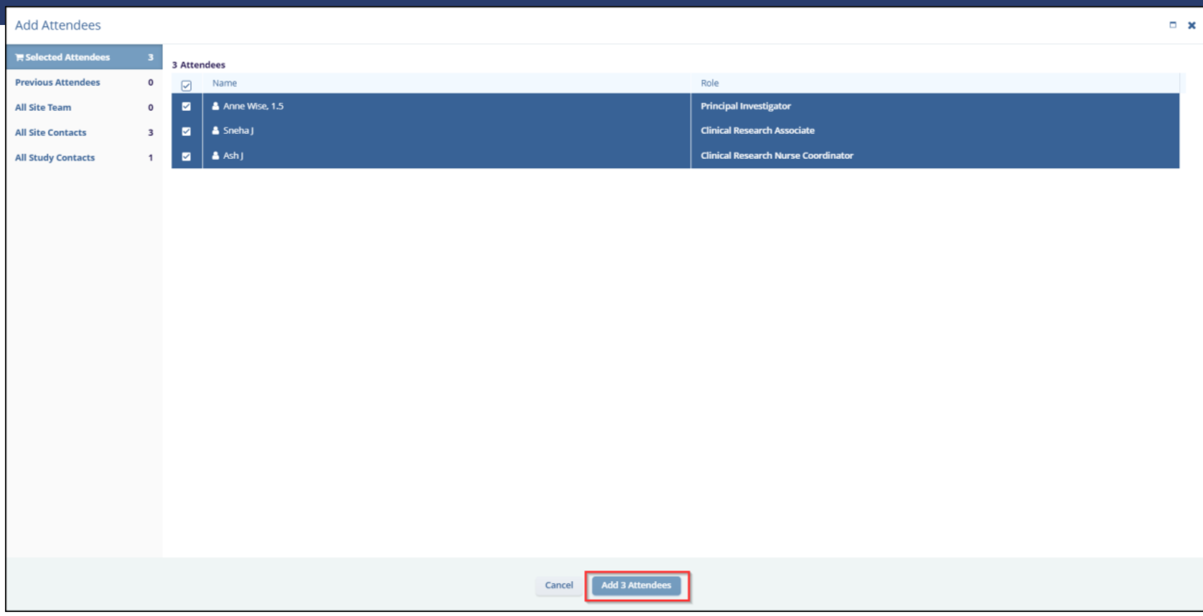
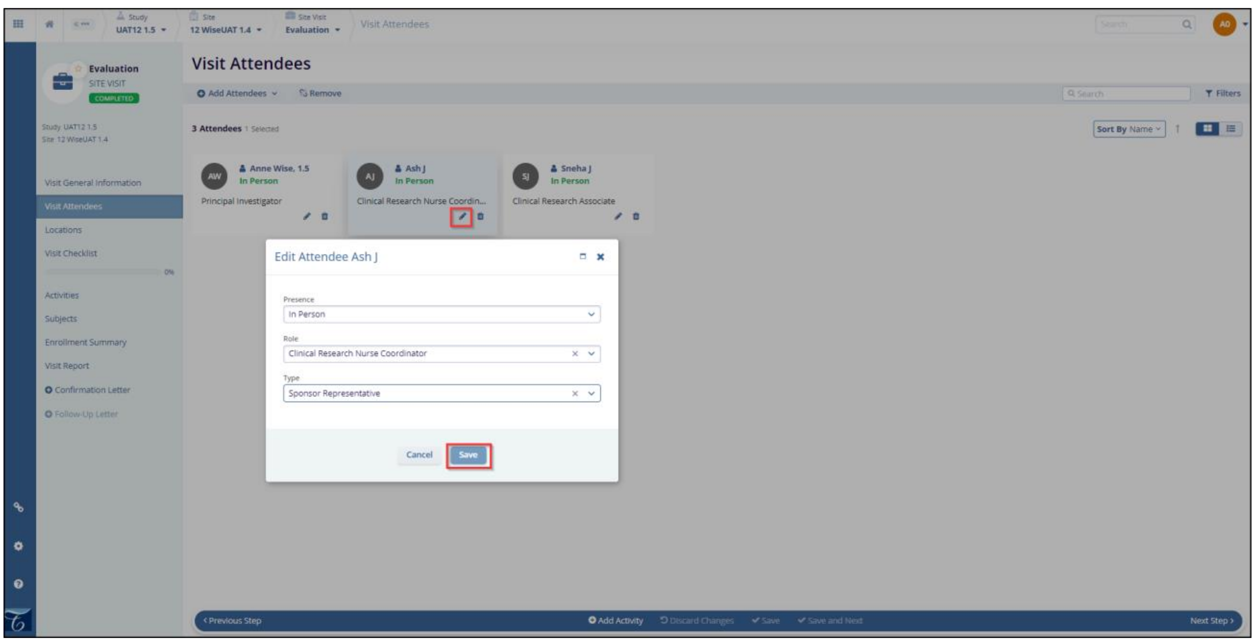


6. We can also the review the **presence** of the Attendee and make any changes if required.



Site Visit Locations

1. Navigate to the Site Visit area for the related site.

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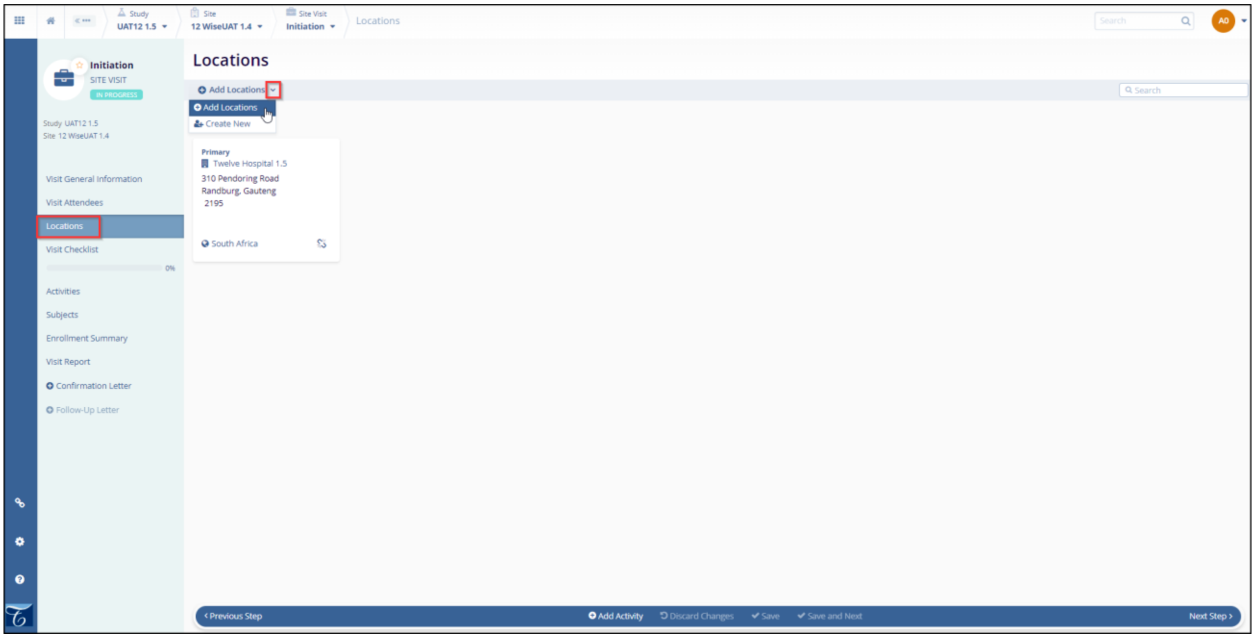
   a. More detailed instructions on this step can be found here.
2. Click on the **Locations** link in the Navigation menu at the left side of the screen.
   a. This opens the “Locations” window.

Note: If the visit was stated as being conducted remotely, a location will not be required to generate a final visit report.

3. Click on the **Add Location** button in the top-left of the screen.
4. Click on the **Add Location** from the dropdown of the “Add Location” button.
   a. This opens the “Add Locations” window.

Note: Clicking **Create New** will create a new/additional site address.



5. Select an existing location and click on the **Add** button in the bottom of the “Add Locations” window.

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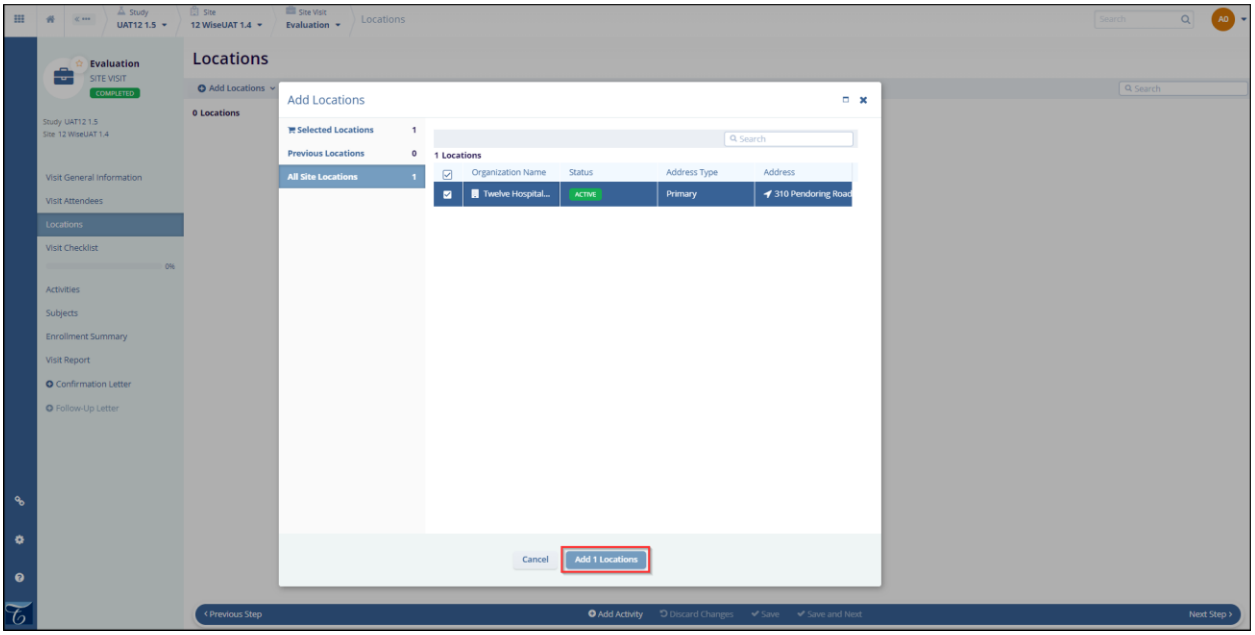
a. Location is added to the visit report and the “Add Locations” window is closed.



Site Visit Checklist

1. Navigate to the Site Visit area for the related site.

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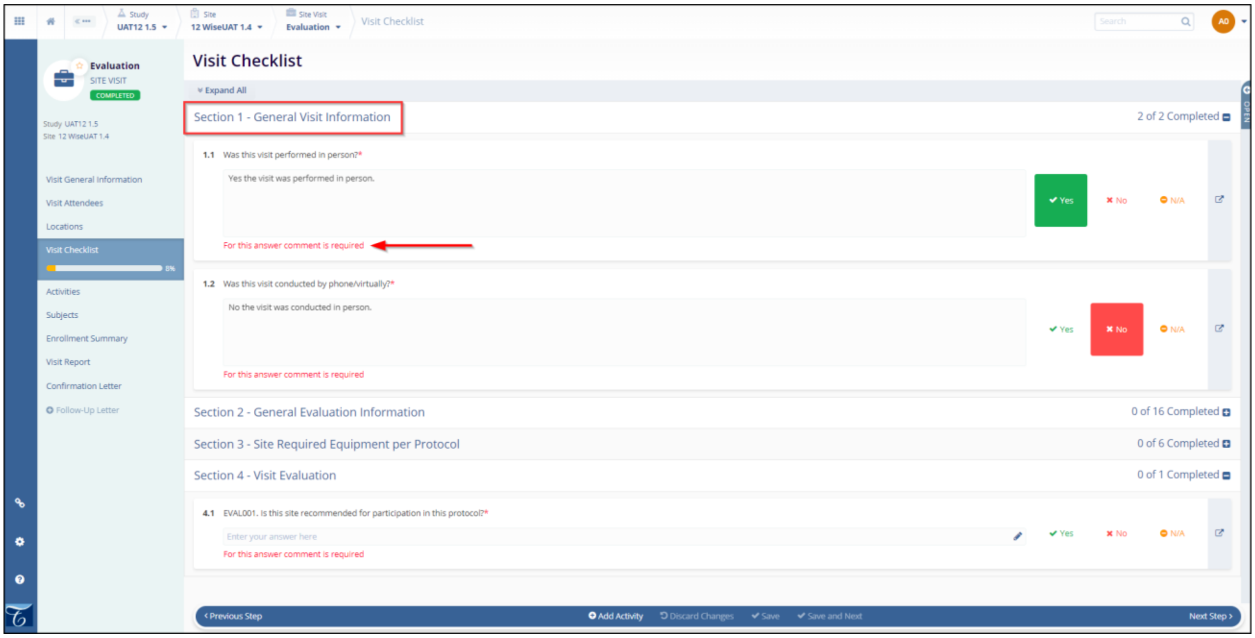
    a. More detailed instructions on this step can be found here.
2. Click on the **Visit Checklist** link in the Navigation menu at the left side of the screen.
    a. This opens the “Visit Checklist” window.
3. Click the **[+]** icon to expand the Section 1 – General Visit Information.
    a. This opens the ‘General Visit Information’ questionnaire.
    b. Select the appropriate answer to the questions.
    c. Mention a comment in the comment box as indicated by an asterisk (*).
    Note: The answer is selected and saved only after a comment is mentioned in the empty field. Also, it is mandatory to answer all questions. Refer to the screenshot below.



4. Click the **[+]** icon to expand the Section 2 – General Evaluation Information.
    a. This opens the ‘General Evaluation Innformation’ questionnaire.
    b. Select the appropriate answer to the questions.
    c. Mention a comment in the comment box as indicated by an asterisk (*).
    Note: The answer is selected and saved only after a comment is mentioned in the empty field. Also, it is mandatory to answer all questions. Refer to the screenshot below.

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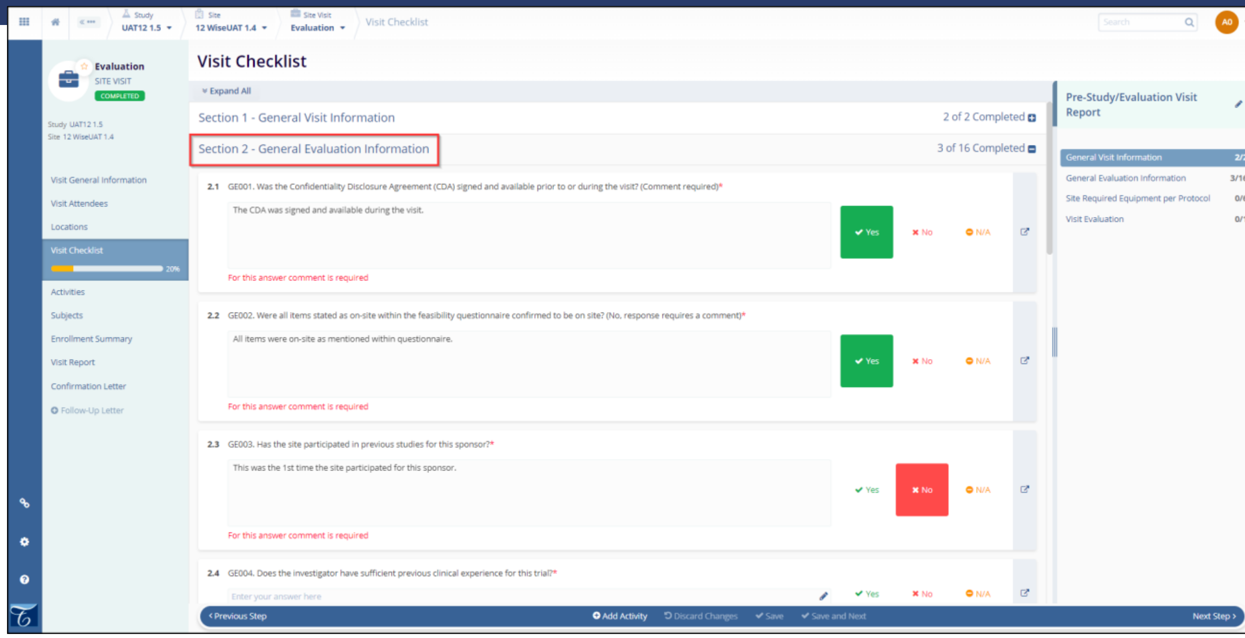

5. Click the **[+]** icon to expand the Section 3 – Site Required Equipment per Protocol.
    a. This opens the 'Site Required Equipment per Protocol' questionnaire.
    b. Select the appropriate answer to the questions.
    c. Mention a comment in the comment box as indicated by an asterisk (*).
    Note: The answer is selected and saved only after a comment is mentioned in the empty field. Also, it is mandatory to answer all questions. Refer to the screenshot below.

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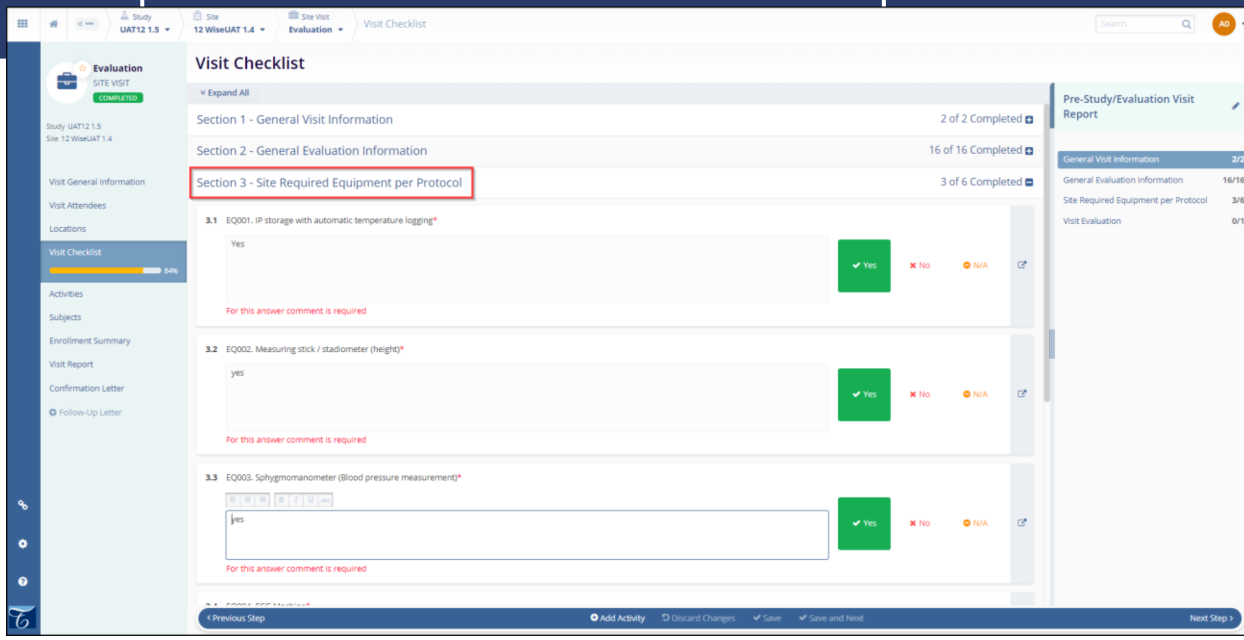

6. Click the **[+]** icon to expand the Section 4 – Visit Evaluation.
    a. This opens the ‘Visit Evaluation’ questionnaire.
    b. Select the appropriate answer to the questions.
    c. Mention a comment in the comment box as indicated by an asterisk (*).
    Note: The answer is selected and saved only after a comment is mentioned in the empty field. Also, it is mandatory to answer all questions. Refer to the screenshot below.

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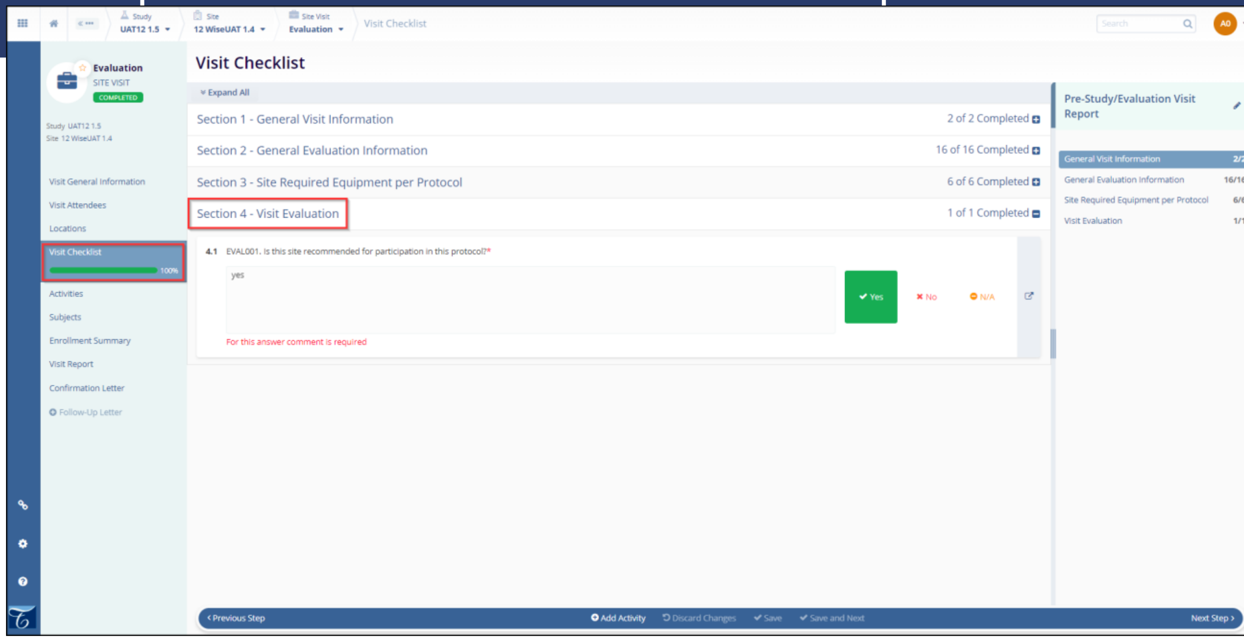

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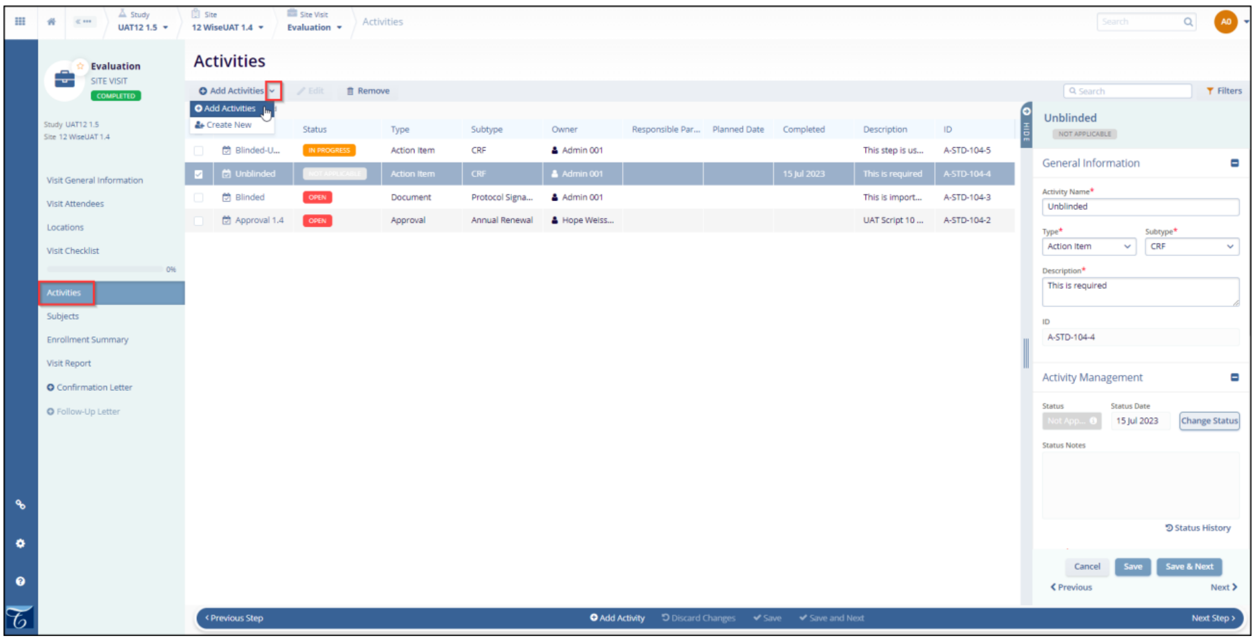
Site Visit Activities

1. Navigate to the Site Visit area for the related site.
    a. More detailed instructions on this step can be found here.
2. Click on the **Activities** link in the Navigation menu at the left side of the screen.
    a. This opens the “Activities” window.
3. Click on the **Add** button in the top-left of the screen
4. Click on the **Add Activities** from the dropdown of the Add button.
    a. This opens the “Add Activities” window.
5. Select an existing site activity from the list of **All Site Activities**.
6. Click on the **Add** button in the Add Activities window.

Note: Clicking **Create New** will create a new activity for the site.



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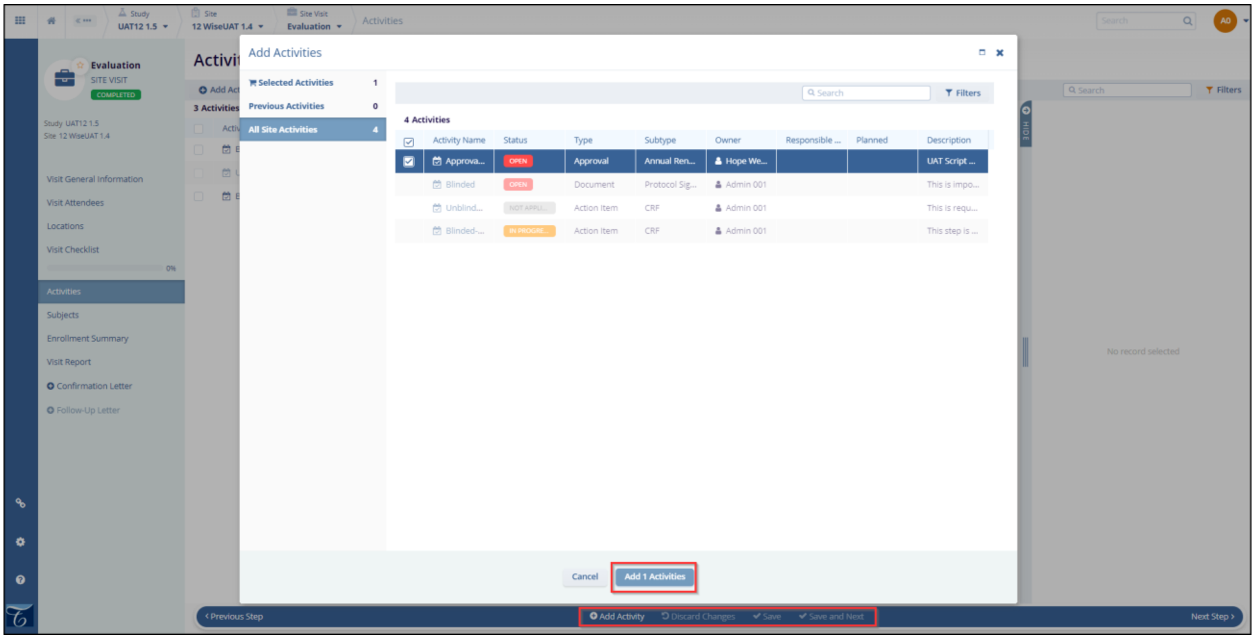

Note: When a previous visit has occurred a user can select **Previous Visit** to select Activities that were associated with the previous visit report.

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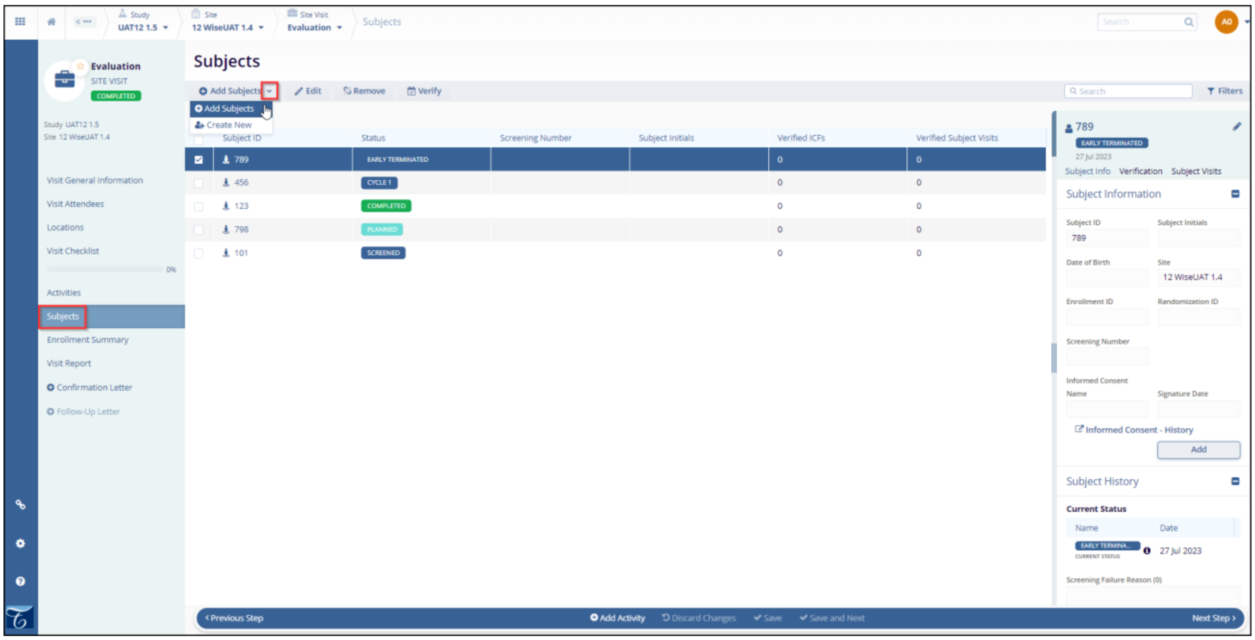
Site Visit Subjects

1. Navigate to the Site Visit area for the related site.
   a. More detailed instructions on this step can be found here.
2. Click on the **Subjects** link in the Navigation menu at the left side of the screen.
   a. This opens the "Subjects" window.
3. Click on the **Add** button in the top-left of the screen.
4. Click on the **Add Subject** from the dropdown of the **Add** button
   a. This opens the "Add Subjects" window.
5. Select an existing site subject from the list of **All Site Subjects**.
6. Click on the **Add** button in the **Add Subjects** window.

Note: Clicking **Create New** will create a new subject for the site.



Note: When a previous visit has occurred a user can select **Previous Visit** to select subjects that were associated with the previous visit report.

7. **Add Subjects** window is closed, and the subject is displayed in the list.
8. To Verify navigate to the subject and click on the check box before subject ID field value.
9. Click on the **Verify** button in the top-left of the screen.
   a. This opens "Subject Verification" window.
10. Select a subject visit to verify during the site visit.
11. Click on the **Go to ICFs** button in the bottom on the subject verification window.
12. Select an ICF to verify and click on the **Save** button.

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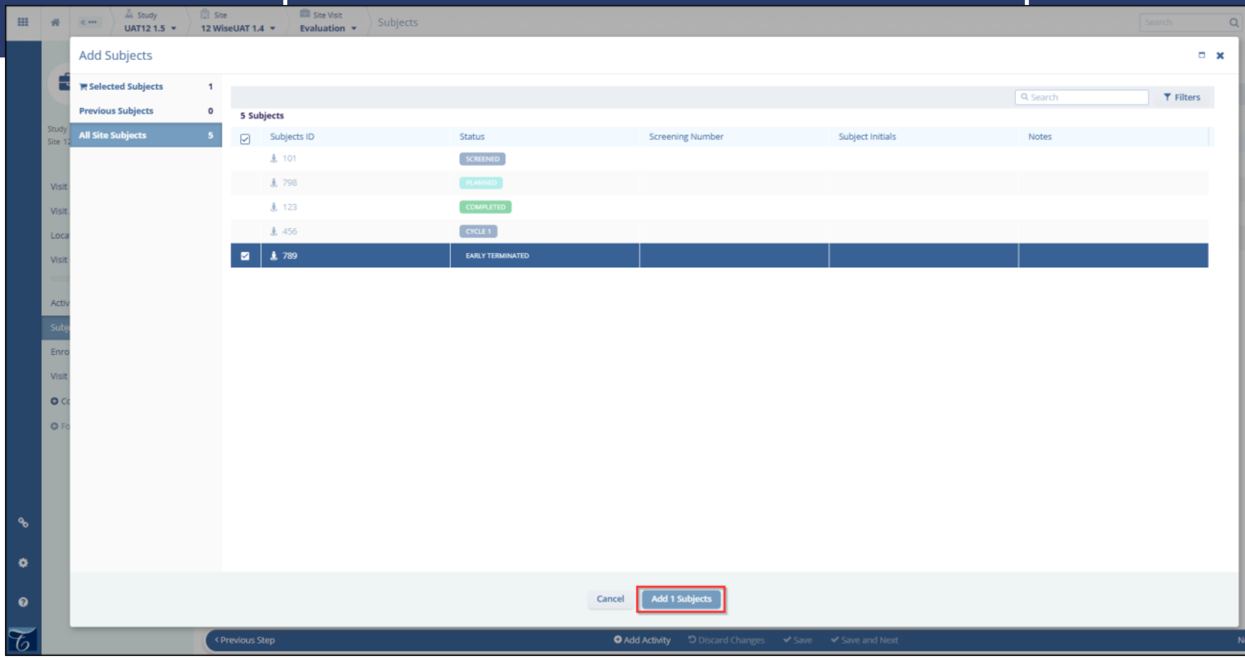

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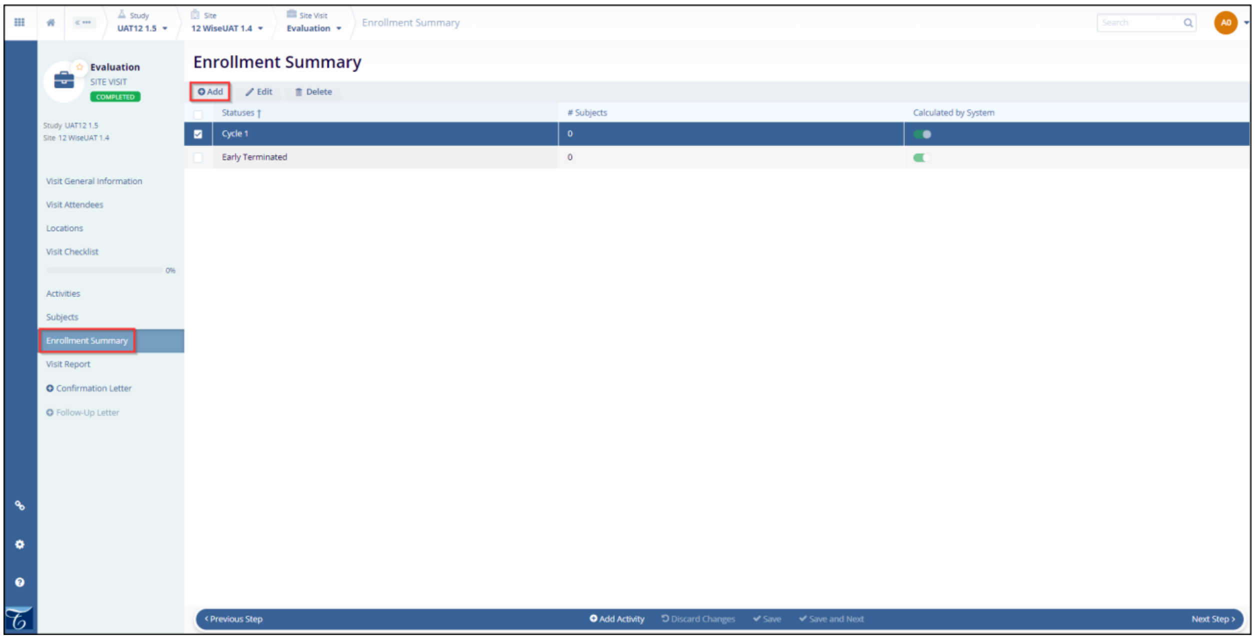
Site Visit Enrollment Summary

1. Navigate to the Site Visit area for the related site.
   a. More detailed instructions on this step can be found here.
2. Click on the **Enrollment Summary** link in the Navigation menu at the left side of the screen.
   a. This opens the “Enrollment Summary” window.
3. Click on the **Add** button in the top-left of the screen.



4. Select the subject Statuses from the dropdown.
5. Indicate if the system should calculate the enrollment statistic or should it be manually entered by the visit report author.

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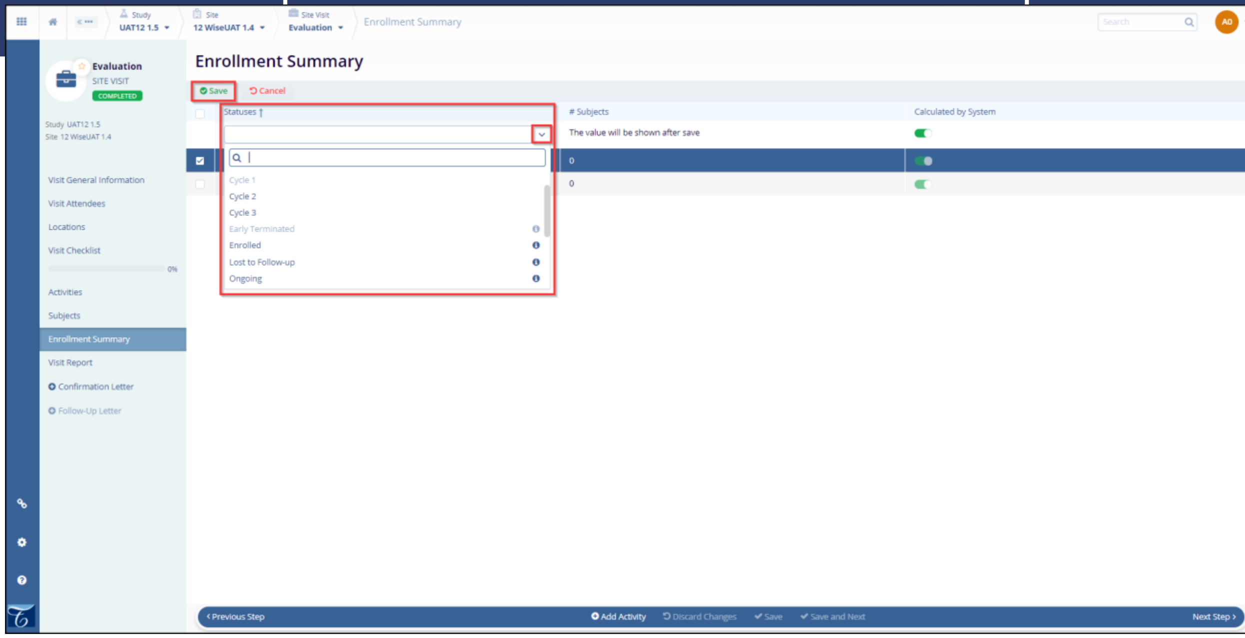

6. Click on the **Save** button in the top-left of the screen.

Note: By turning off **Calculated by System**, the system will allow the user to manually enter the site's enrollment statistics for the site at the time of the site visit.

Note: The statuses that are added once are greyed out from the dropdown menu and cannot be added again.

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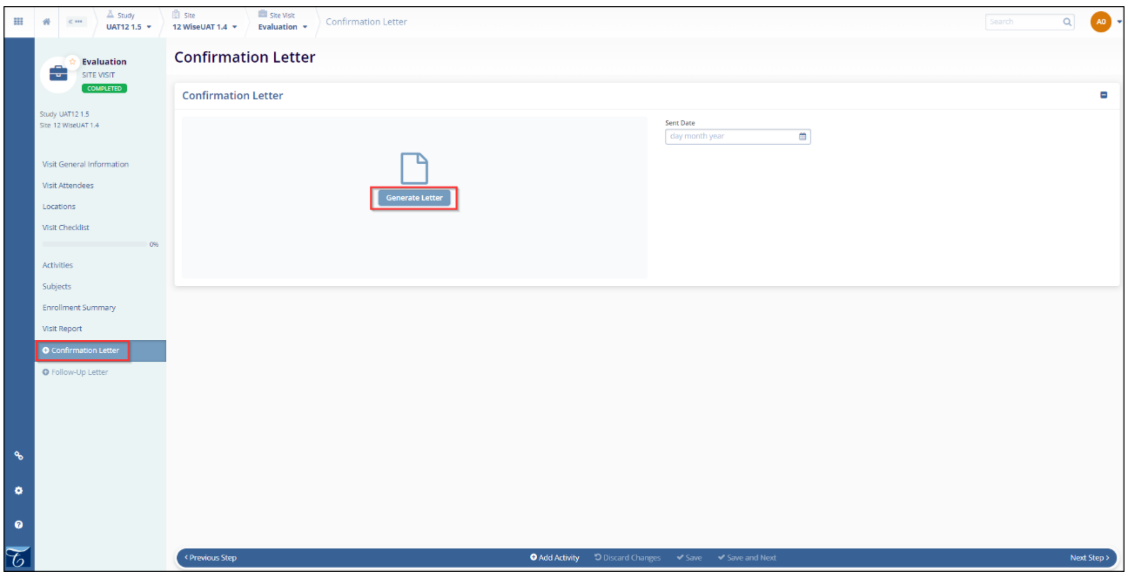
Site Visit Confirmation Letter Creation

1. Navigate to the Site Visit area for the related site.
   a. More detailed instructions on this step can be found here.
2. Click on the **Confirmation Letter** link in the Navigation menu at the left side of the screen.
   a. This opens the "Generate Confirmation Letter" window.

   Note: Confirmation letter content will be based on the visit preparation data selected.

3. Click the **Generate Letter** button.
   a. This opens the Generate Confirmation Letter window with Step 1 to perform.
   b. Click **Next** to select: **Activites**, **Attendees**, **Locations**, and **Subjects**.



4. Review the sections within the confirmation letter that are relevant.
5. Click on the **Create** button in the bottom of the **Generate Confirmation Letter** window.

Note: A user can turn off any section that is not relevant to a visit related confirmation letter. Regardless of user selection/incorporation a letter will only display content that there is a location within the template to display that data.

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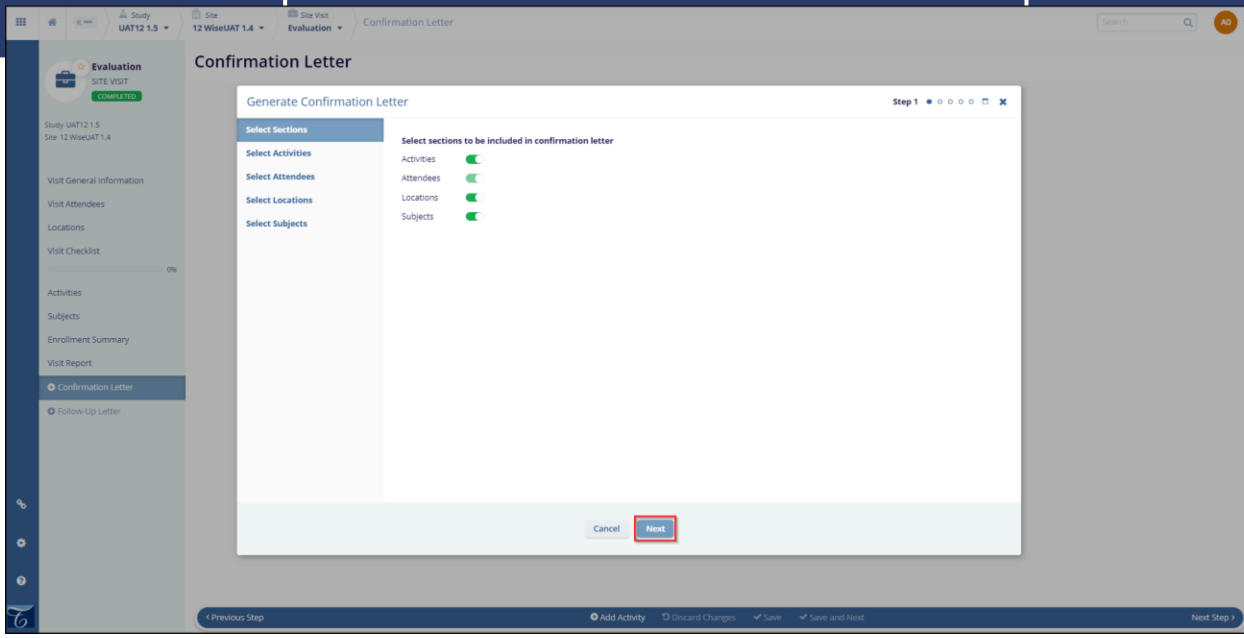

6. Click on the **Create** button in the bottom of the **Generate Confirmation Letter** window, once all the selections are made for the letter.
7. This generates the site visit confirmation letter as per our selections.

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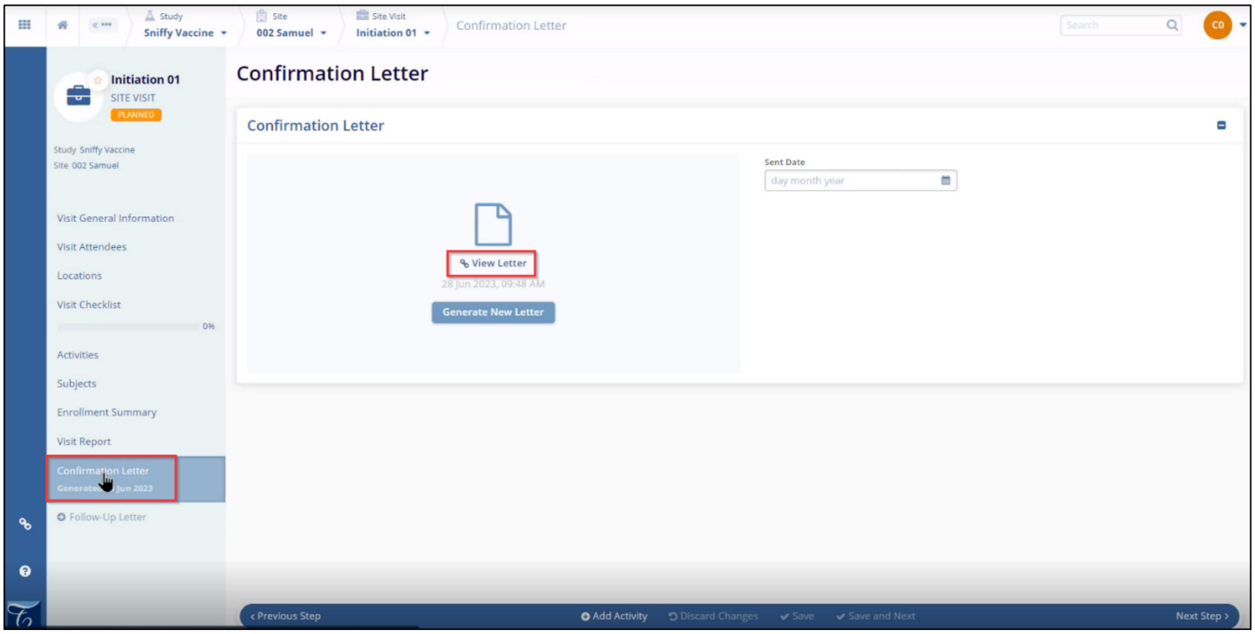
Process of Signing the Document/Workflow Approval

After the document Site Visit Final Report is generated/completed, the workflow approval is required from the officials. Follow the steps below to complete the workflow approval:

1. Click the **View Letter** button the in Confirmation Letter link.



2. This opens the document in Trial Interactive Collaborative Room in a new tab of the browser.
3. Click the **Edit Document** button displayed in the top left corner.
   a. This opens the document to edit.
4. Make the required changes in the document and click **Save** at the bottom right of the window. Notice that the page is refreshed and all the values that are entered in the Visit Report Checklist are displayed in the document.

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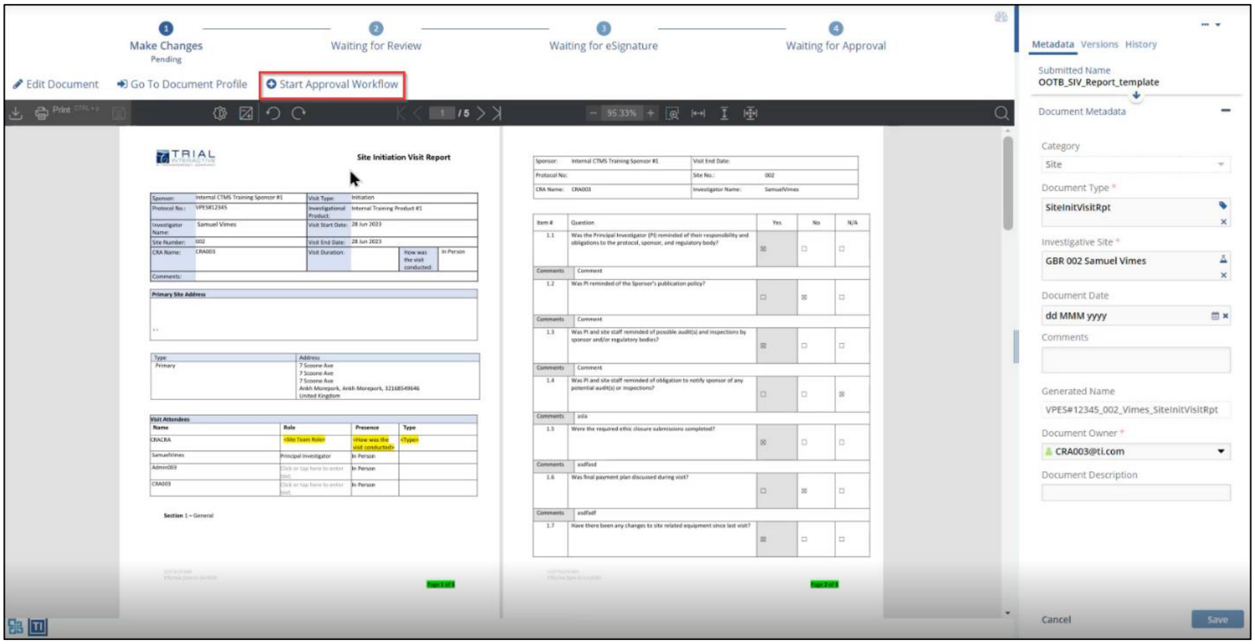
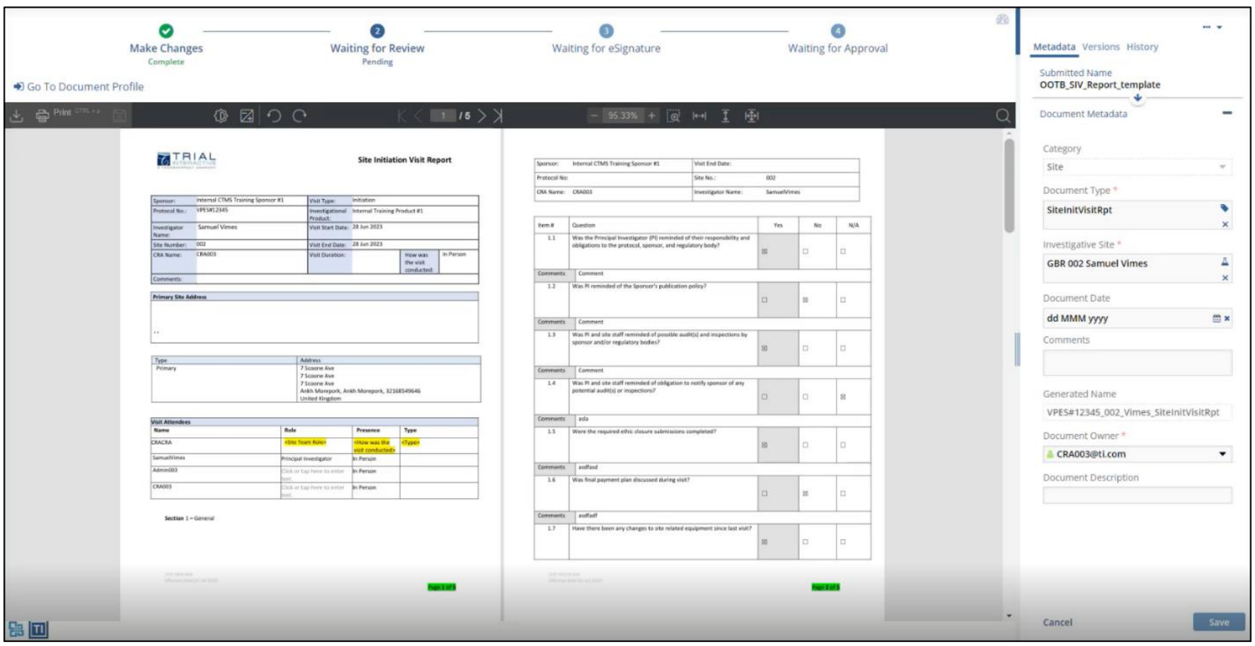
5. Click the **Start Approval Workflow** button is displayed in the top left corner.



6. A notification is displayed in the top right corner – Add document(s) to Monitoring Visit Workflow. Notice that the **Make Changes** stepper displayed in the top right corner is shows a green tick mark with Complete status. Refer to the screenshot below.



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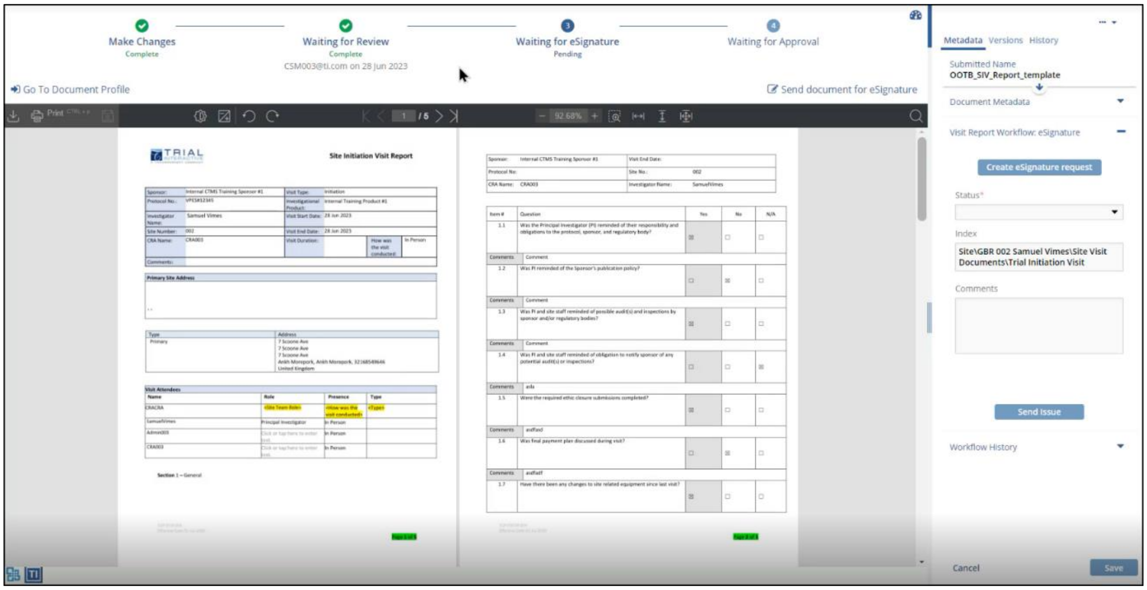
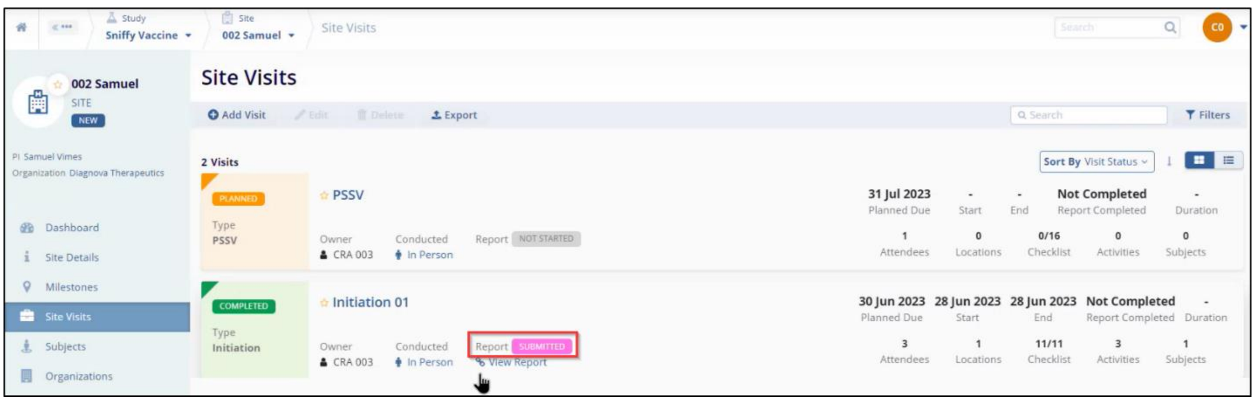
7. The Document is now sent to the reviewer. The Reviewer signs/approves the review. Notice that the **Waiting for Review** stepper displayed at the top shows a green tick mark with a Complete status with the email ID of the reviewer and the date of process. Refer to the screenshot below.



8. The Status is changed to **Submitted** in the Site Visits tab. Refer to the screenshot below.



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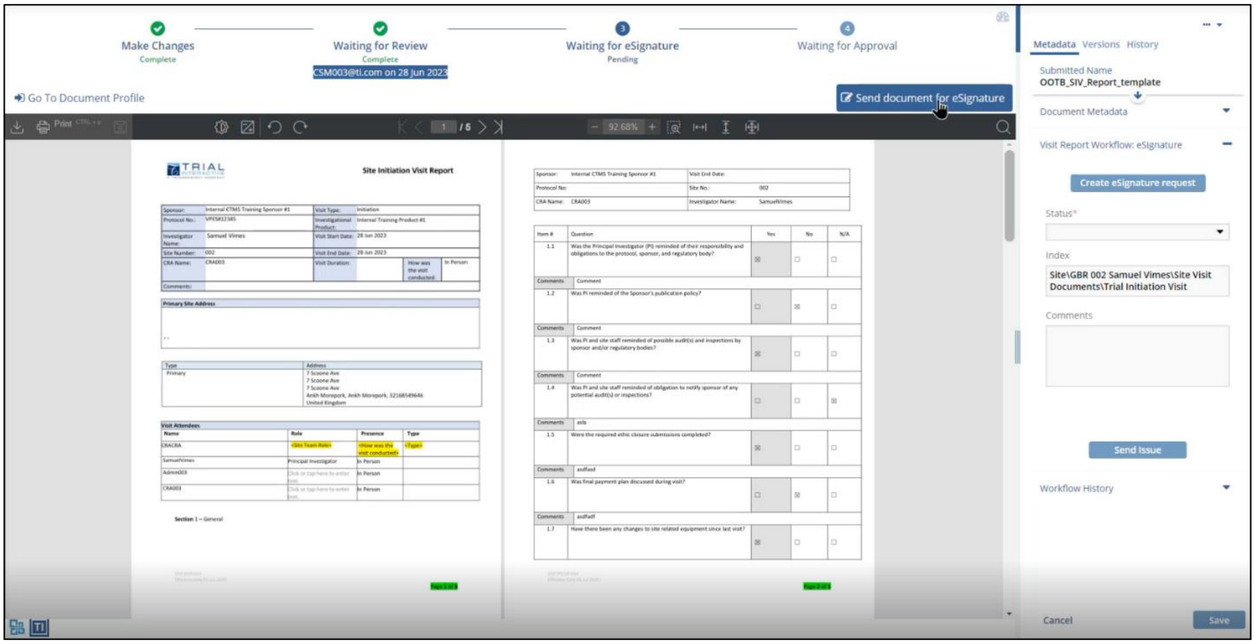
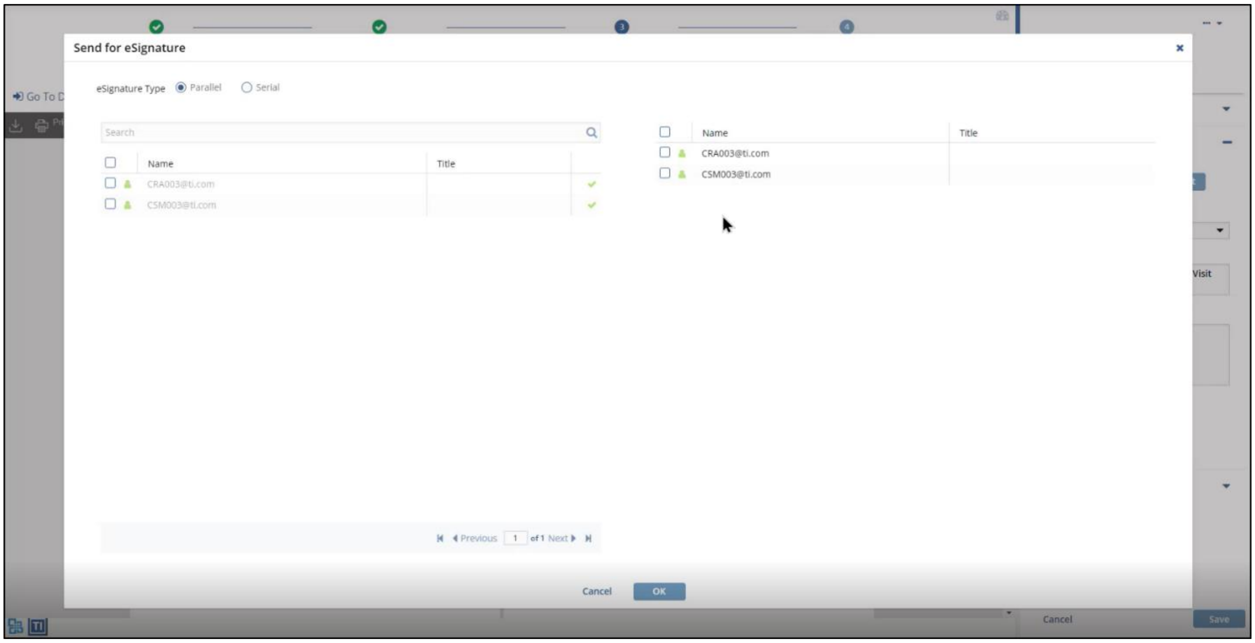
9. Click the **Send document for eSignature** button displayed in the top right corner.



   a. This opens the Send for eSignature window.
10. Select a radio button for eSignature Type – Parallel or Serial.
11. Select the checkbox(s) displayed in front of the email IDs and click **OK** at the bottom of the window.



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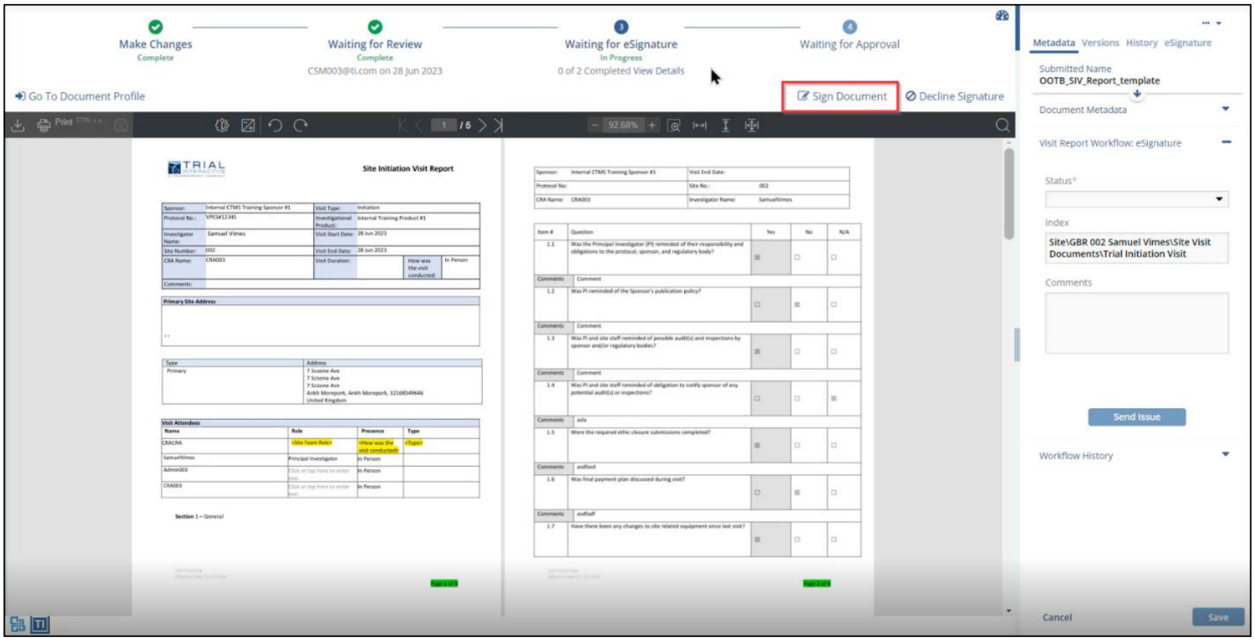
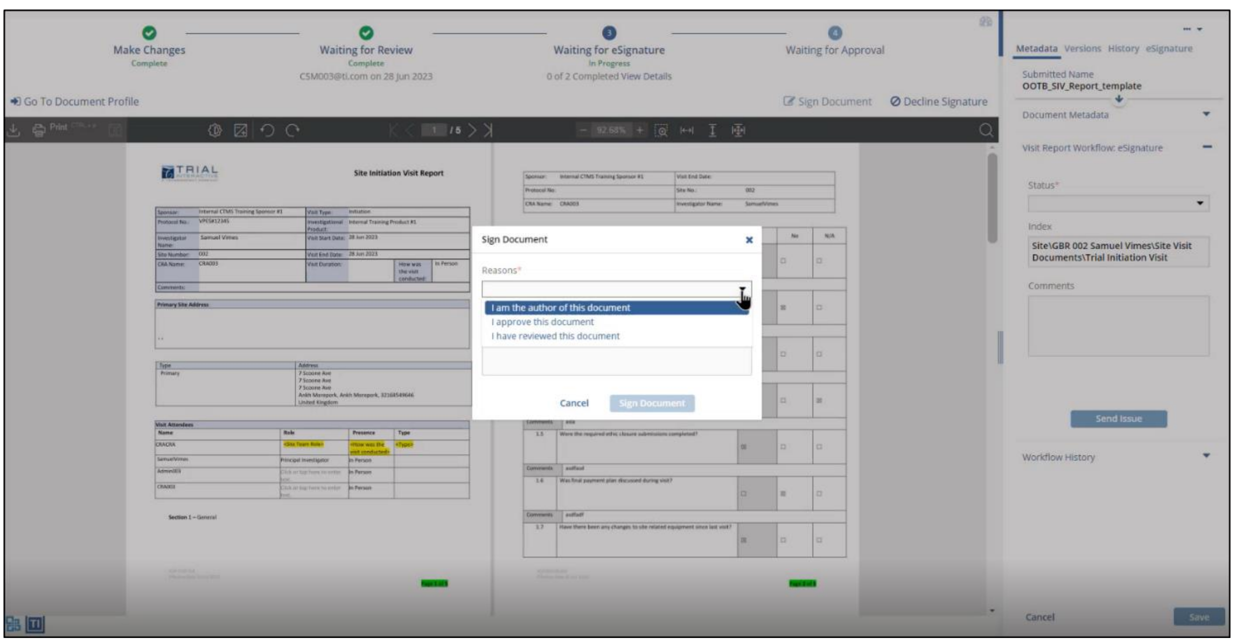
12. Notice that the **Waiting for eSignature** stepper displays In Progress with the number of signers. It also displays the ‘Sign Document’ and ‘Decline Signature’ buttons in the top right corner.
13. Click the **Sign Document** button.



a. This opens the Sign Document window.

14. Select a reason from the down arrow menu as indicated by an asterisk (*).



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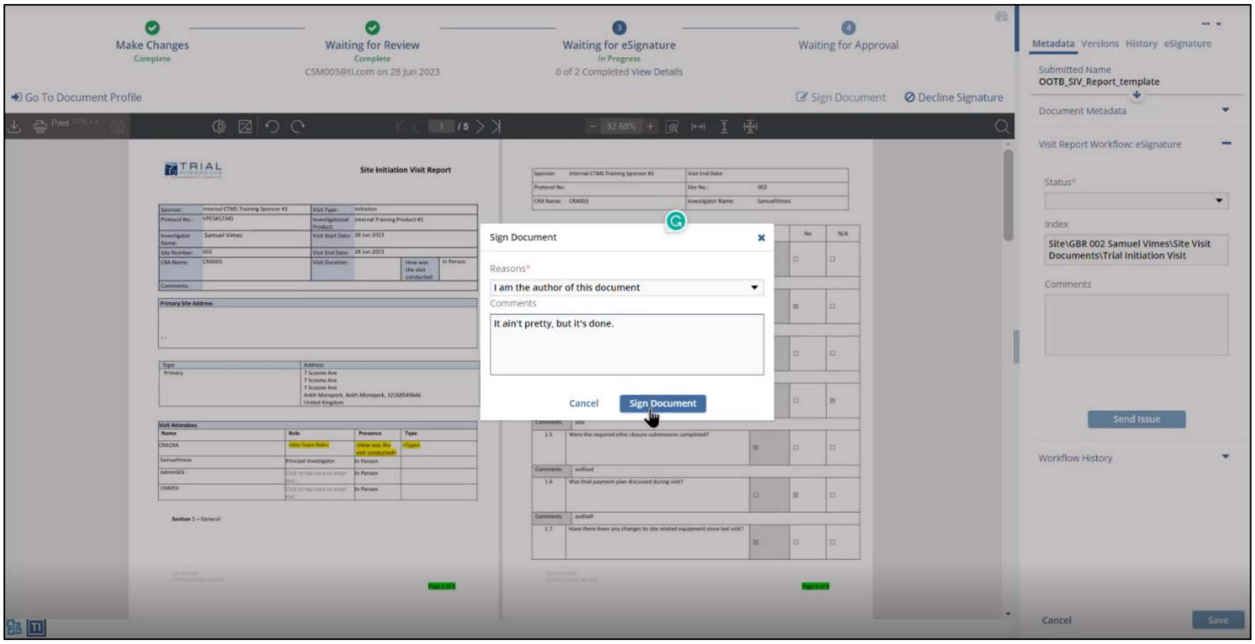
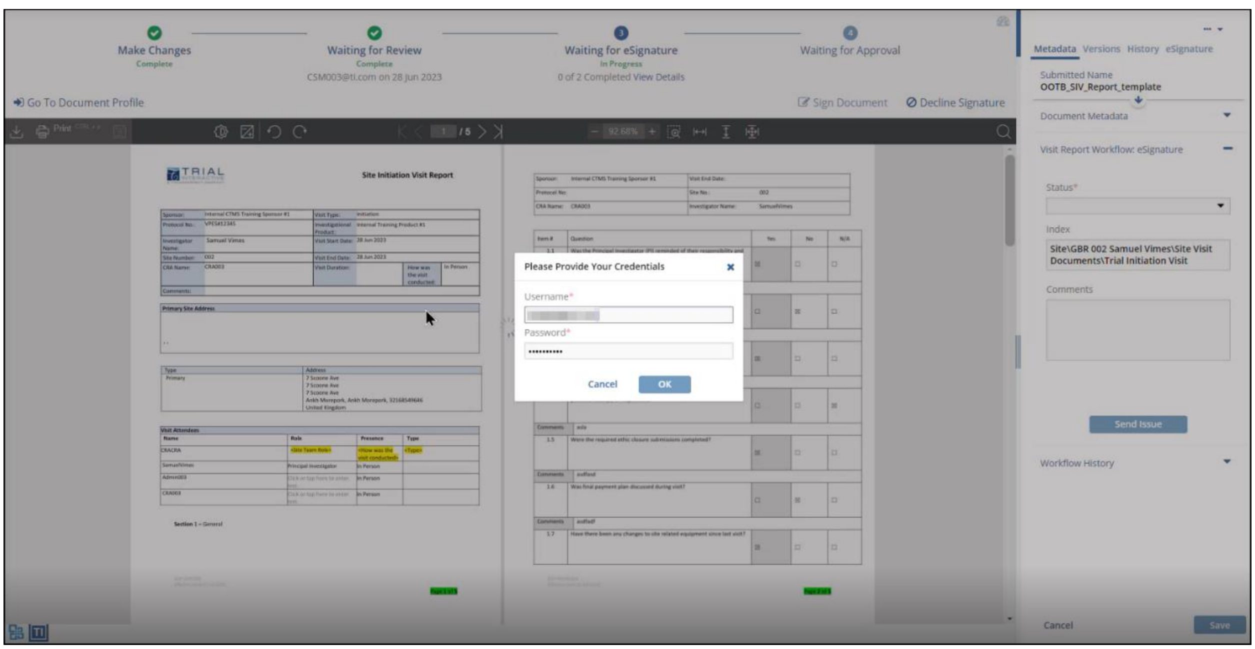
15. (Optional) Enter the comments if required and click **Sign Document** button.



a. This opens the Please Provide Your Credentials window.

16. Enter the Username and Password in the fields as indicated with an asterisk(*) and click **OK**.



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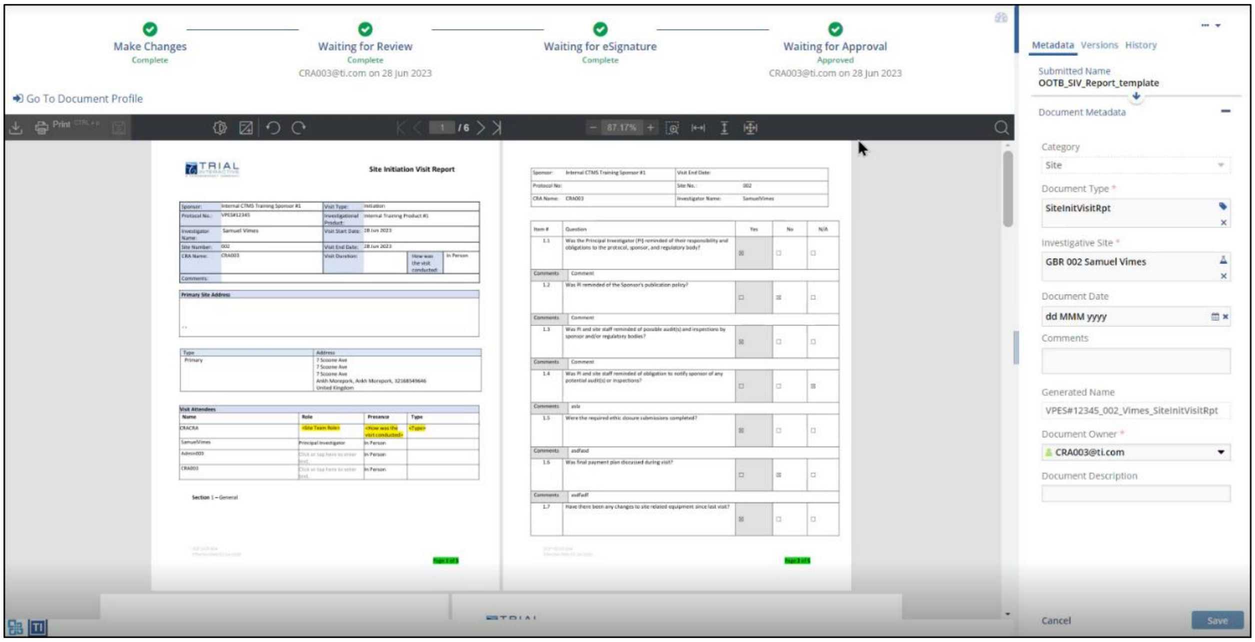
17. The document is signed and approved. Notice that the **Waiting for Approval** stepper displays a green tick mark with the email ID of the signed user and the date of signature below. Refer to the screenshot below.



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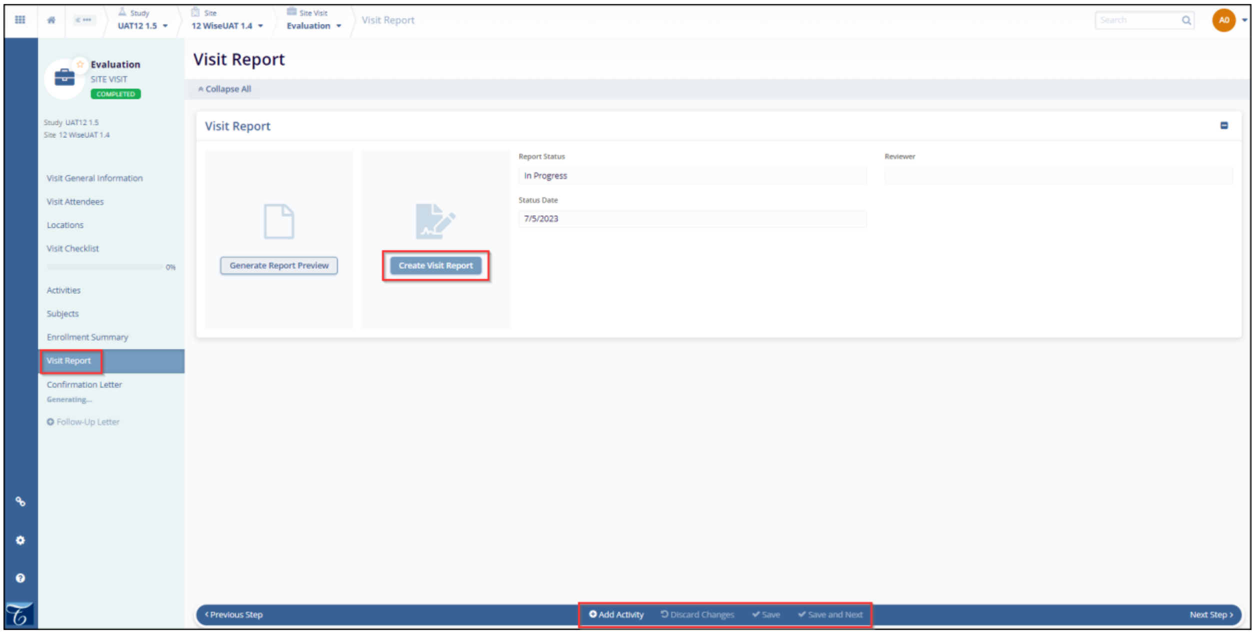
Site Visit Draft Report Generation

1. Navigate to the Site Visit area for the related site.
   a. More detailed instructions on this step can be found here.
2. Click on the **Visit Report** link in the Navigation menu at the left side of the screen.
   a. This opens the “Visit Report” window.
3. You can update the **Report Status** to **In Progress** and click on the **Save** button.



4. Click on the **Generate Draft Report** button in the screen.
   a. This opens the “Generate Draft Report” window.

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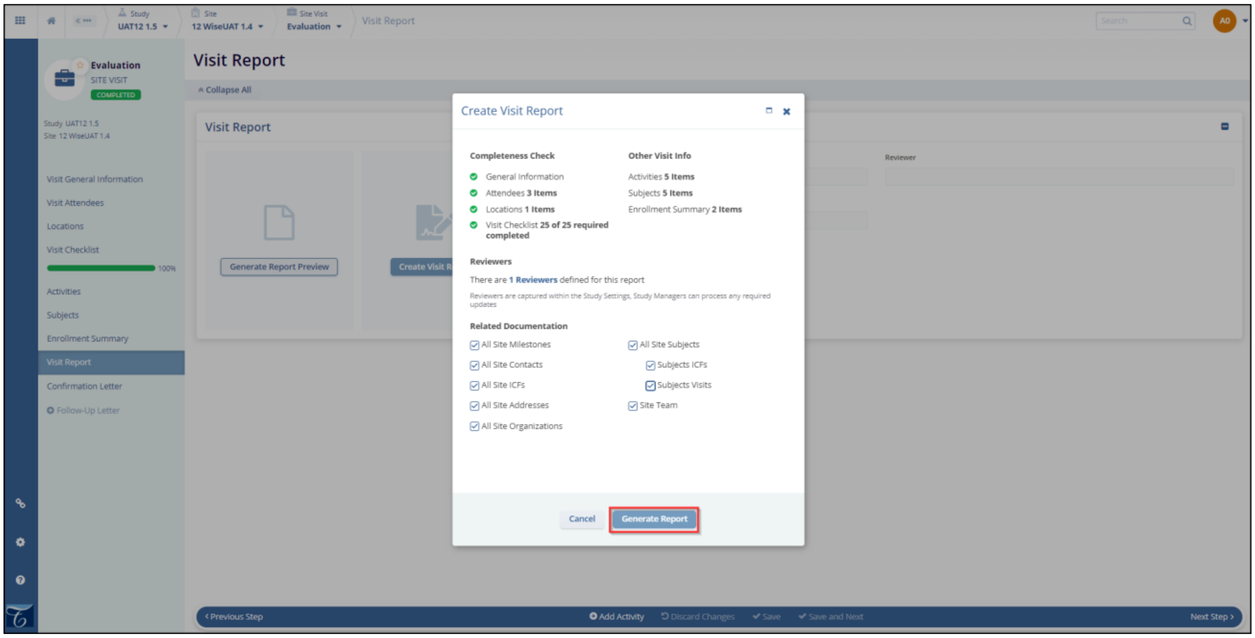
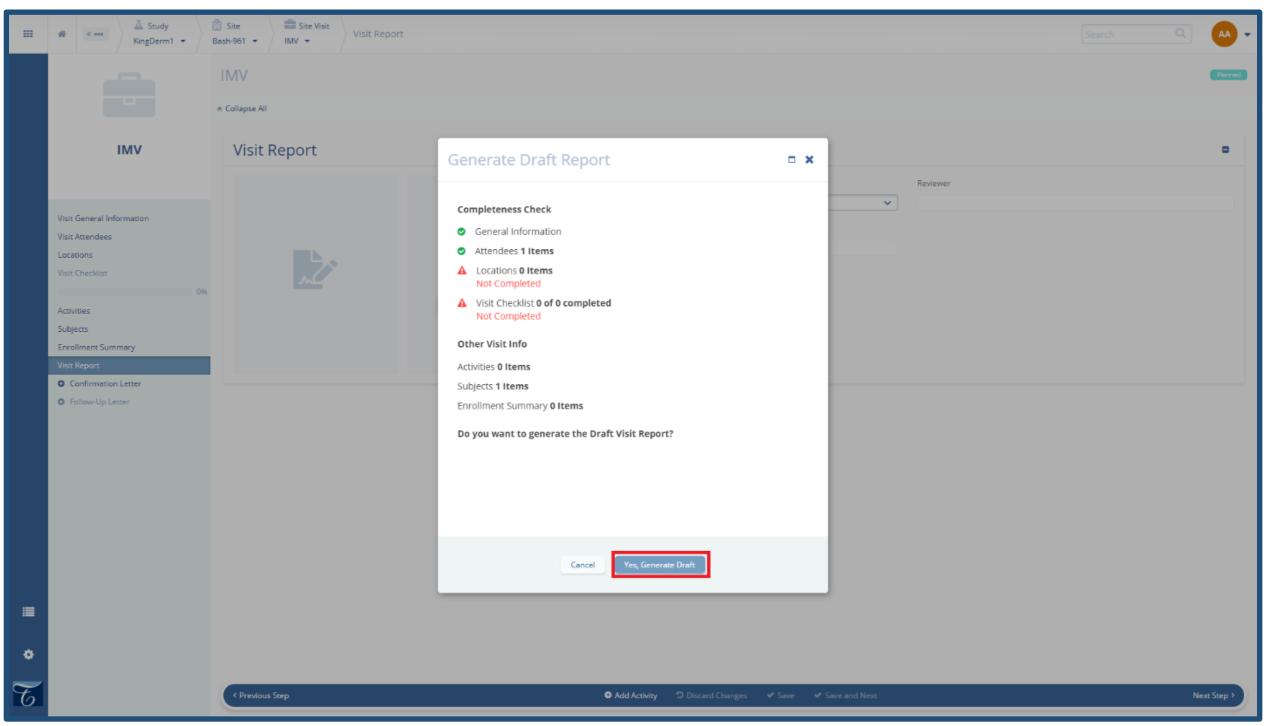
5. Click on the **Yes, Generate Draft** button in the bottom of the window.



Note: The Generate Report button is disabled if the 'Visit Checklist' is not completed. The Generate Draft Report window displays the fields in red color that are not filled. Refer to the screenshot below.



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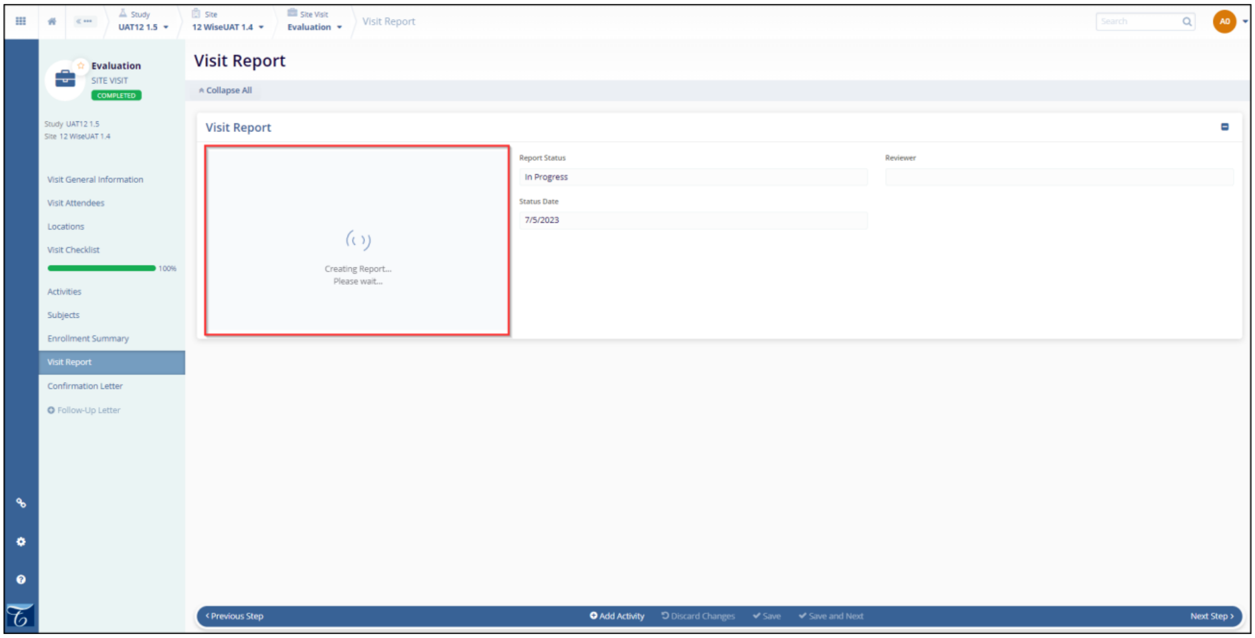
6. It shows as **Generating Draft Report please wait** when we click on **Yes, Generate Draft** button.



7. Draft visit report is generated, and origami is opened displaying the draft report.

Site Visit Final Report Generation

1. Navigate to the Site visit area for the related site.
   a. More detailed instructions on this step can be found here.
2. Click on the **Visit Report** link in the Navigation menu at the left side of the screen.
   a. This opens the “Visit Report” window.
3. Click **Generate Report** in the visit report window.
   a. This open the “Generate Visit Report” window
4. Click on the **Yes, Generate** button in the Generate Visit Report.

Note: A final visit report can be routed through the submission/review/approval process within origami.

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Site Visit Follow-up Letter Creation

1. Navigate to the Site Visit area for the related site.
   a. More detailed instructions on this step can be found here.
2. Click on the **Follow-up Letter** link in the Navigation menu at the left side of the screen.
   a. This opens the **Follow-up Report** window.

   Note: Follow-up letter content will be based on the final visit report data selected.

3. Review the sections within the confirmation letter that are relevant.
4. **Generate Follow-up Letter** window displays the selected sections and the selected content from the final report
5. Click on the **Next** button on the screen.

Note: A user can turn off any section that is not relevant to a visit related follow-up letter. Regardless of user selection/incorporation a letter will only display content that there is a location within the template to display that data.

6. Click on the **Create** button of the window.
7. Follow-up letter is generated, and origami is opened displaying the letter.

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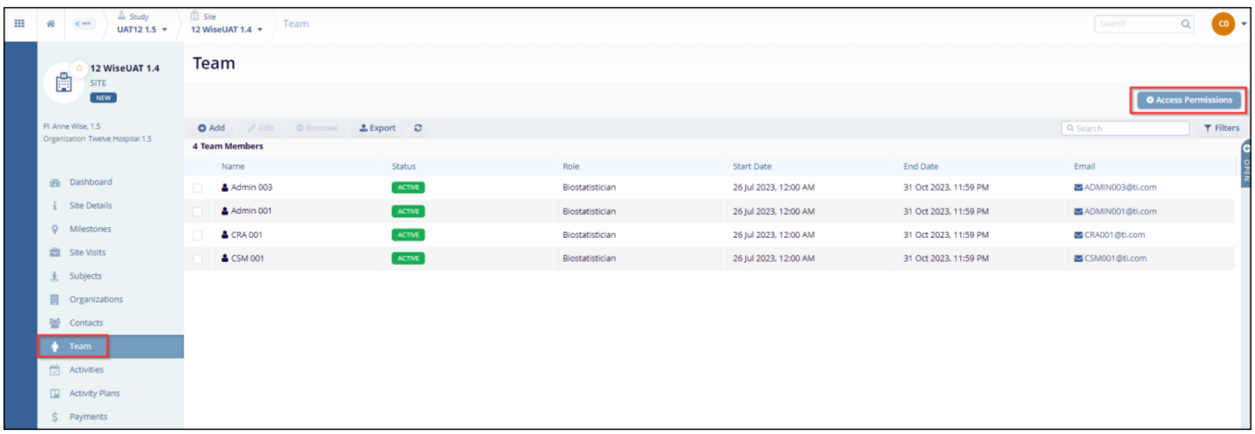
Access Permissions

This feature helps the user add, edit, activate, remove access permissions for other users.

Follow the steps below to view the access permissions and make the required changes.

1. Click the **Studies** link displayed in the left side of the menu bar.
   a. This opens the Studies page.
2. Select a study in which you want to manage access permissions.
   a. This opens the Studies Dashboard.
3. Click on a Site from the list available.
   a. This opens the Sites dashboard.
4. Click on the **Team** link displayed in the left side of the menu bar.
   a. This opens the Team page.
5. Click the **Access Permissions** button displayed in the top left corner of the screen.
   a. This opens the Access Permissions page. Refer to the screenshot below.



6. Select the checkbox of the name whose access permissions you want to change.
   a. This enables the tabs on the top ribbon with the following buttons – **Add, Edit Permissions, Activate, Remove** and **Set as Owner**.

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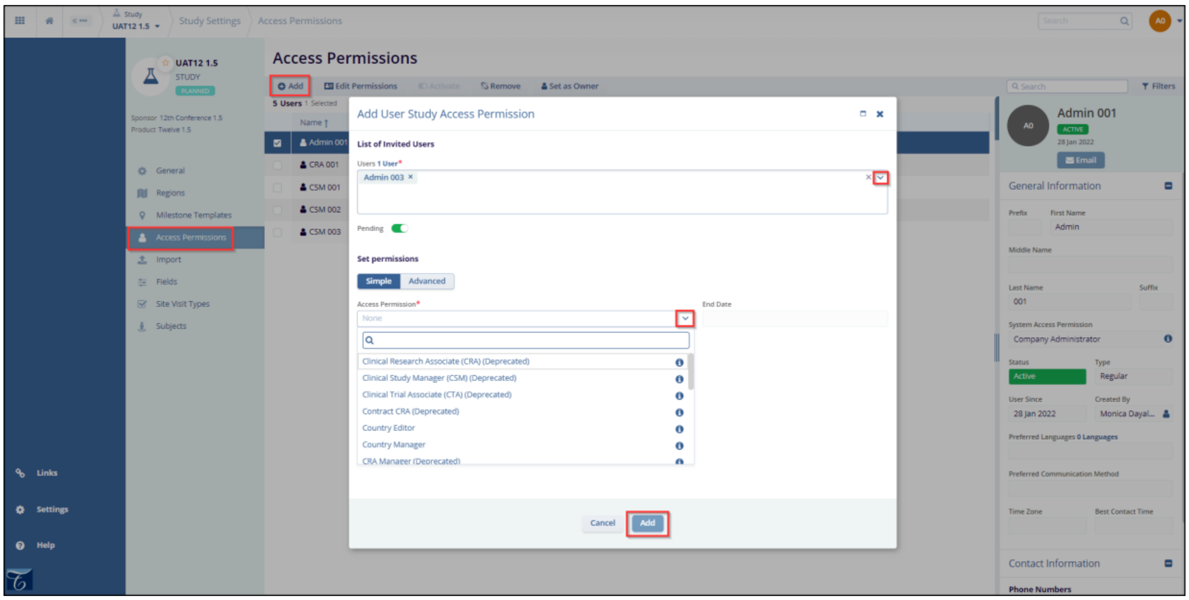
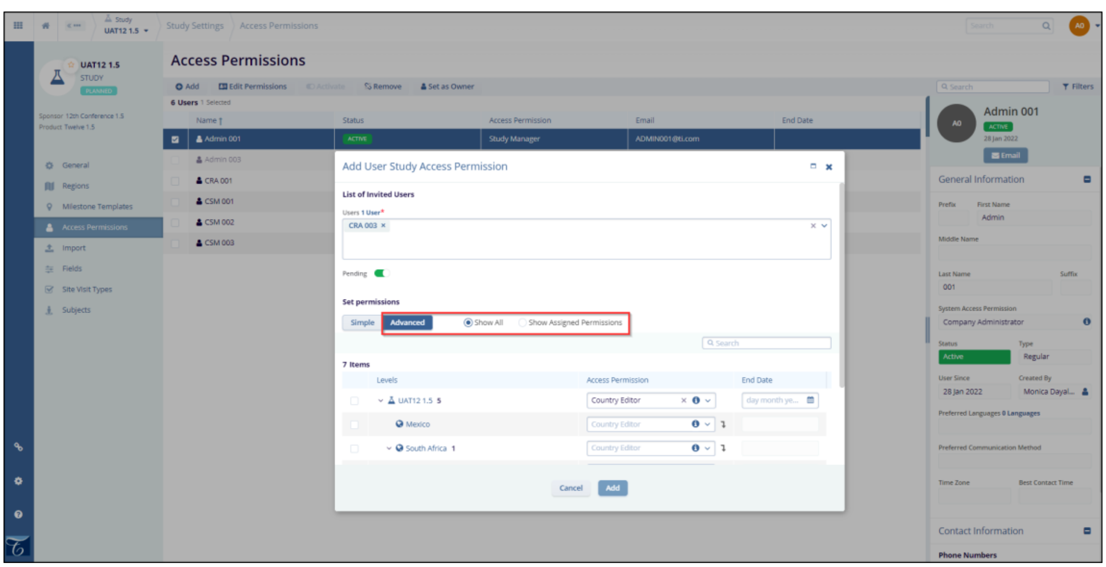
To add user study access permissions, follow the steps below:

1. Click the **Add** button displayed in the top left corner.
   a. This opens the Add User Study Access Permission window.
2. Select the user(s) from the dropdown list in the Users box.
   Note: The names that are already used are disabled and displayed in grey color.
3. **(Optional/if required)** Click the **Pending** radio button. Selecting this button, the user has to later activate this user.



4. Select the **Simple** or **Advanced** button from the Set Permissions field.
   Note: By default, the button is set on Simple. Selecting Advanced button displays – Show All and Show Assigned Permissions radio buttons.



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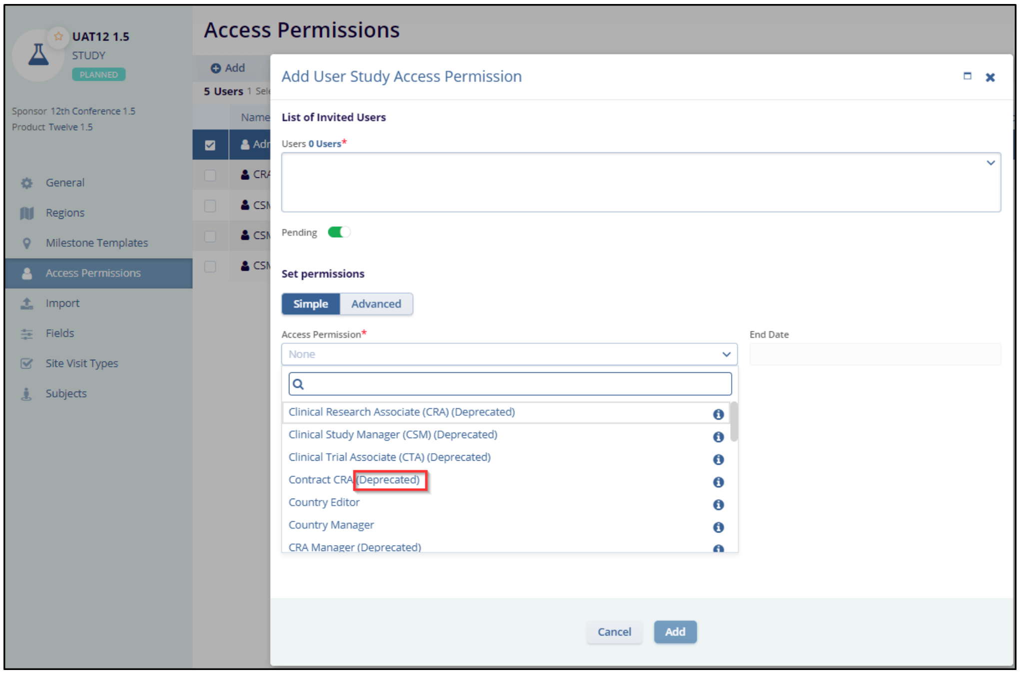
5. Select the **Access Permission** from the dropdown menu.
   Note: The access permissions that display **Deprecated** next to the role are no longer used. Refer to the screenshot below.



6. Click **Add** at the bottom of the pop up window. The added user acces permission is displayed in the grid.

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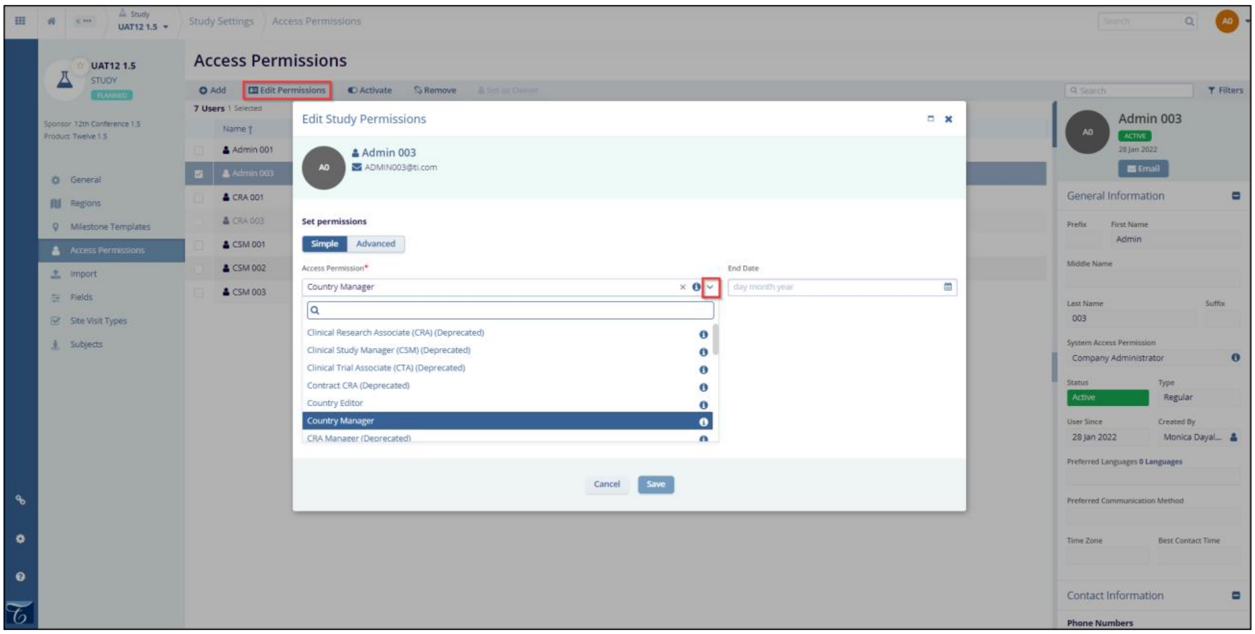
To Edit user study access permissions with Simple option, follow the steps below:

1. Select the checkbox of the name whose access permissions you want to change.
2. Click the **Edit Permissions** button displayed in the top left corner.
   a. This opens the Edit Study Permissions window.
3. By default, the **Simple** button is selected and accordingly the options are displayed. Select the role from the dropdown menu of Access Permission field.
4. **(Optional)** Select the End Date from the **Calendar** icon. Refer to the screenshot below.



5. Click **Save**.

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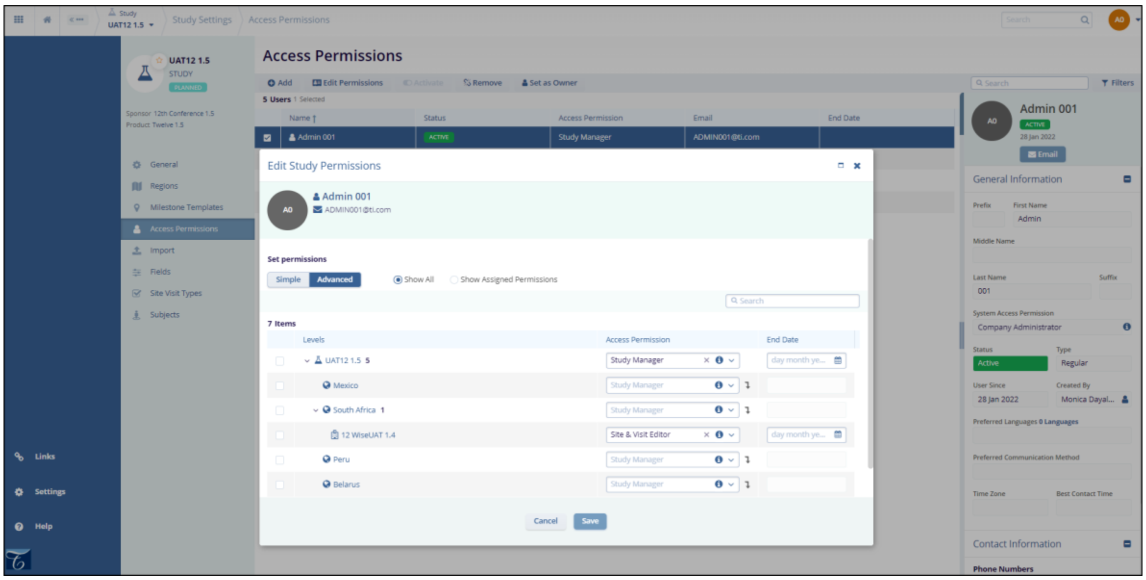
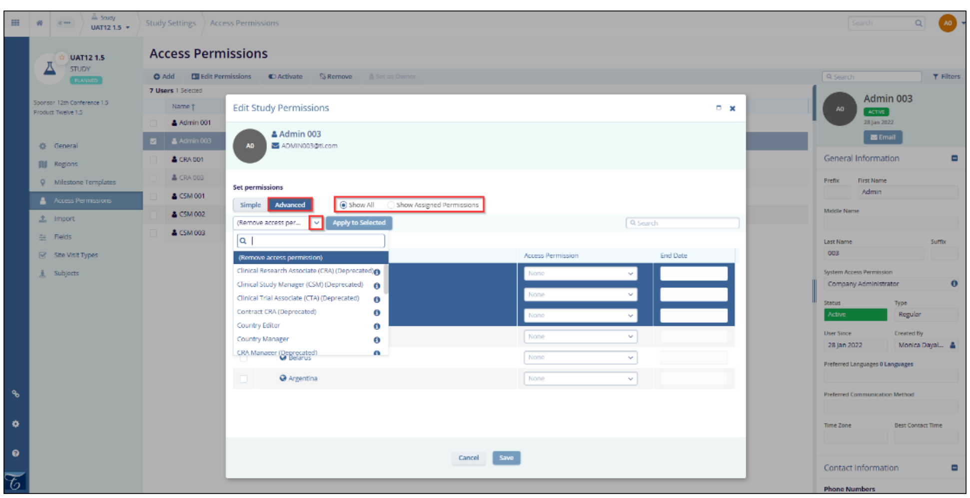
To Edit user study access permissions with Advanced option, follow the steps below:

1. Select the checkbox of the name whose access permissions you want to change.
2. Click the **Edit Permissions** button displayed in the top left corner.
   a. This opens the Edit Study Permissions window.
3. Select the **Advanced** button. Notice that two radio buttons are displayed – **Show All** and **Show Assigned Permissions**. Select the role from the dropdown menu of Access Permission field.
4. **(Optional)** Select the End Date from the **Calendar** icon. Refer to the screenshot below.
5. Select the checkbox in front of the Level.
6. Click the Dropdown menu and select a role. Click the **Apply to Selected** button.
7. Select the role from the dropdown menu of the Access Permission column.
8. (Optional) Select the End Date and click **Save**.





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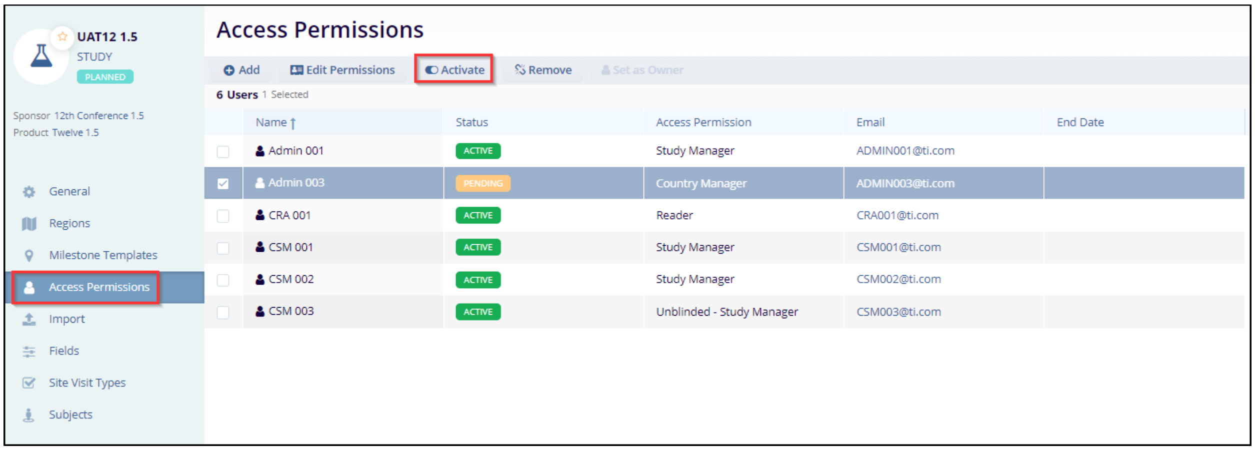
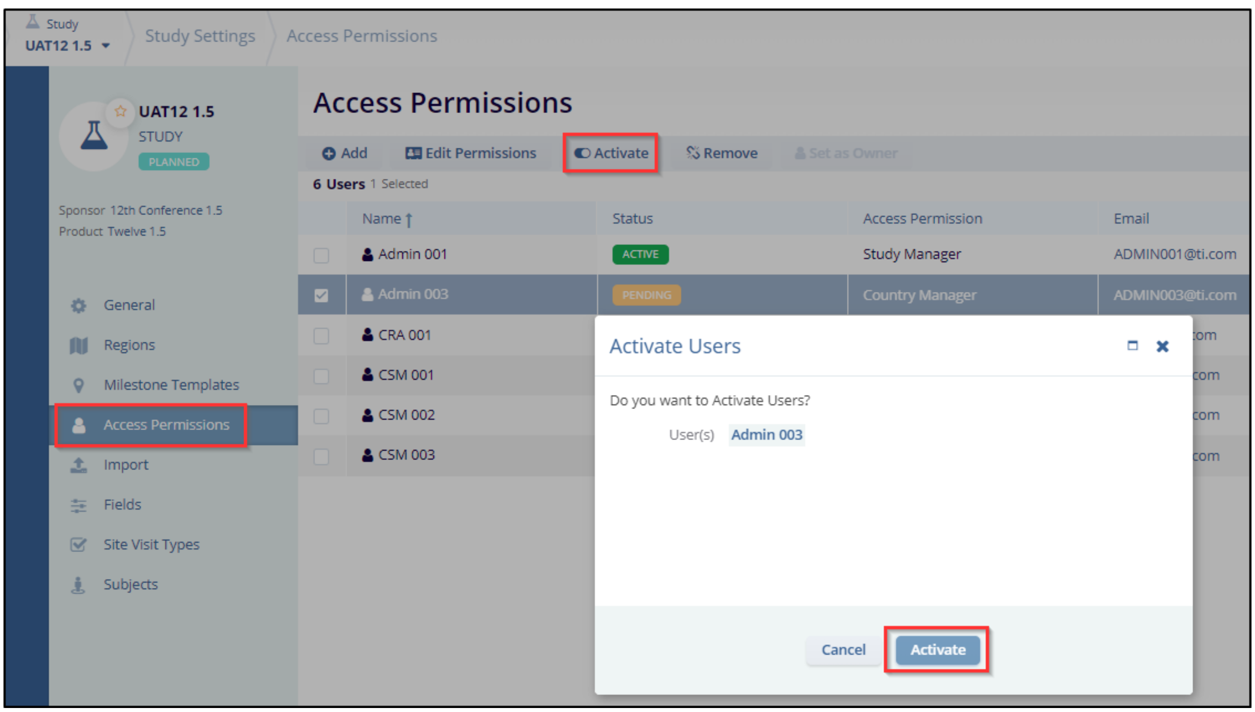
To activate user study access permissions, follow the steps below:

1. Select the checkbox of the user that displays the **Pending** Status.
   a. This activates the Activate radio button in the top ribbon bar.
2. Click the **Activate** radio button.
   a. This opens the Activate Users window.
3. Click the Activate button in the popup window. Refer to the screenshot below.





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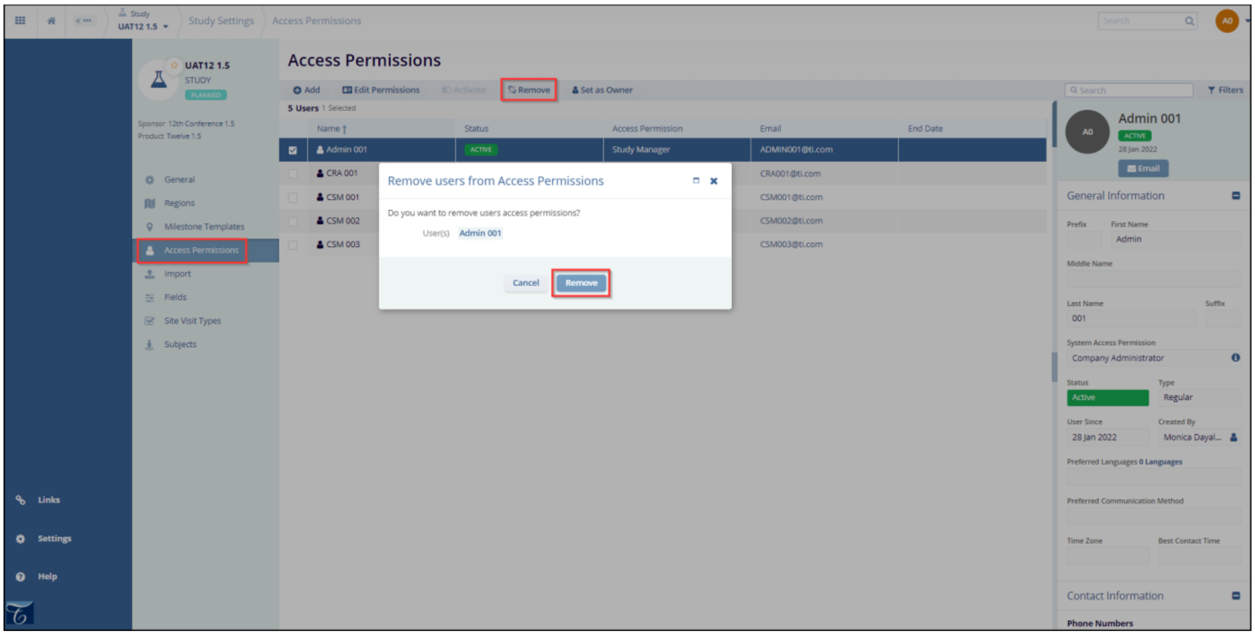
To remove user from access permissions, follow the steps below:

1. Select the checkbox of the user that is no longer needed.
2. Click the **Remove** button displayed in the top ribbon bar.
   a. This opens the Remove users from Access Permissions window.
3. Click **Remove**. Refer the screenshot below.



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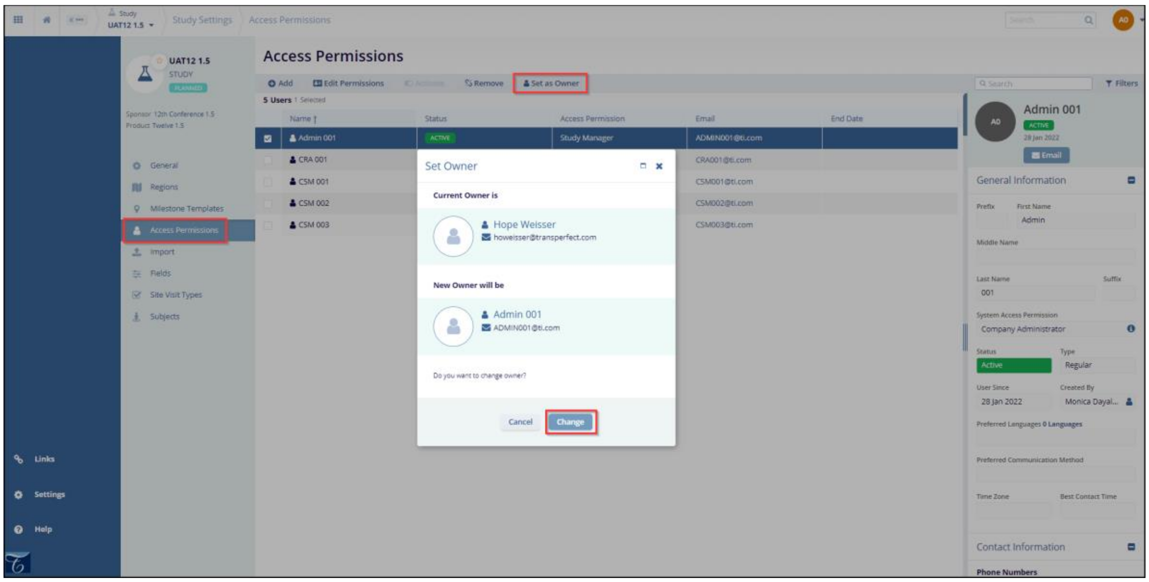
To set new owner of the study, follow the steps below:

1. Select the checkbox of the user whose access permissions need to be changed .
2. Click the **Set as Owner** button displayed in the top ribbon bar.
   a. This opens the Set Owner window.
3. Confirm the selected new owner is as per the requirement and click **Change**. Refer to the screenshot below.



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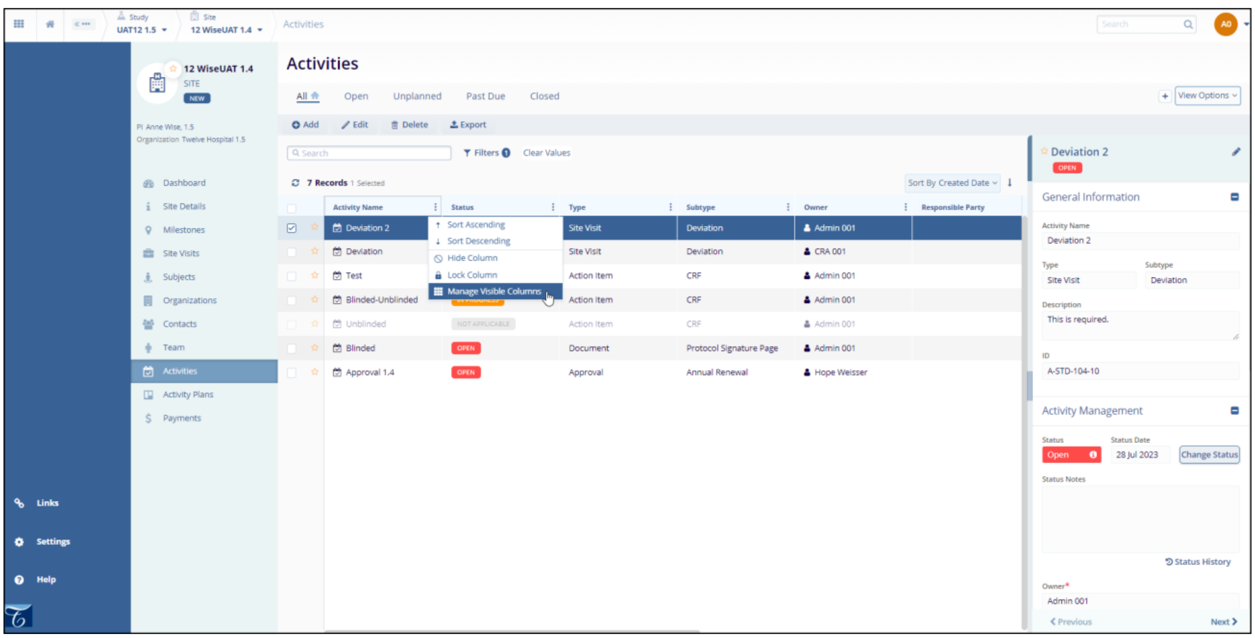
Manage Visible Columns

This feature helps the user to create customized view of Activities for themselves. Follow the steps below to manage visible columns:

1. Click the **Studies** link displayed in the left side of the menu bar.
   a. This opens the Studies page.
2. Select a study in which you want to manage the columns to be visible.
   a. This opens the Studies Dashboard.
3. Click on a Site from the list available.
   a. This opens the Sites dashboard.
4. Click on the **Activities** link displayed in the left side of the menu bar.
   a. This opens the Activities page.
5. Click on the **Ellipsis** (three dot menu) displayed next to the Activity Name column.
   a. This displays the following options – **Sort Ascending and Descending**, **Hide and Lock Column** and **Manage Visible Columns**. Refer to the screenshot below.



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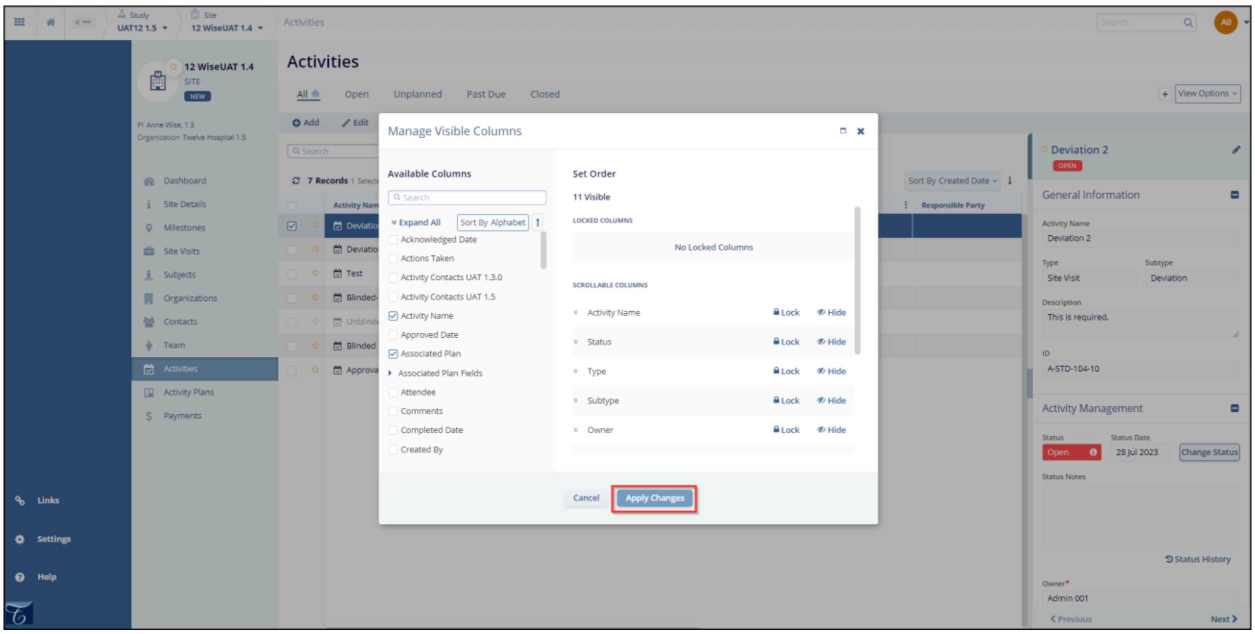
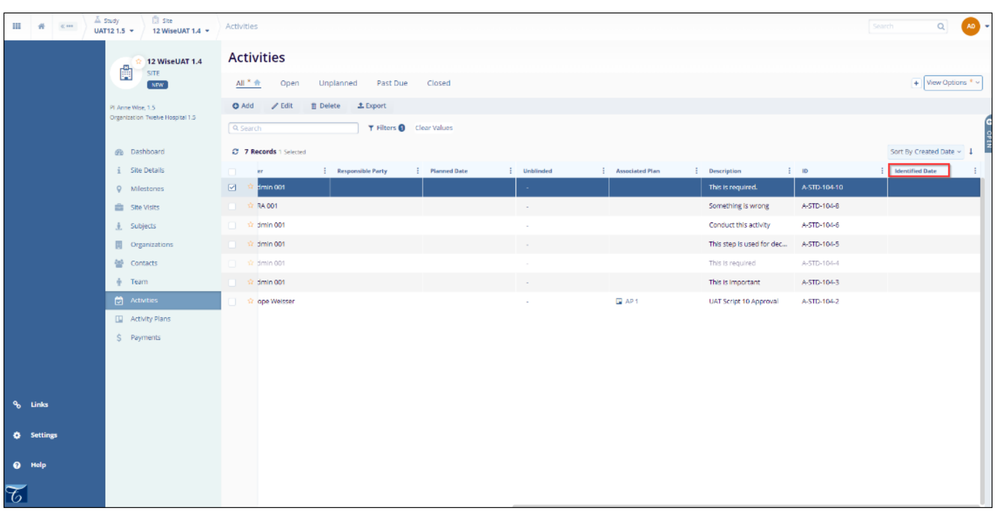
6. Click the **Manage Visible Columns** option.
   a. This opens the Manage Visible Columns window.
7. Select a checkbox of the appropriate option from the left Available Columns.
   a. The selected option is displayed in the right side Set Order column.
   Note: Scroll down in the window to view the selected options. Also, the already selected columns can be Locked or Hidden from the current view by clicking the appropriate option.
8. Click **Apply Changes** in the Manage Visible Columns window.



9. Move the horizontal scroll bar to the right side to view the selected column. Refer to the screenshot below.



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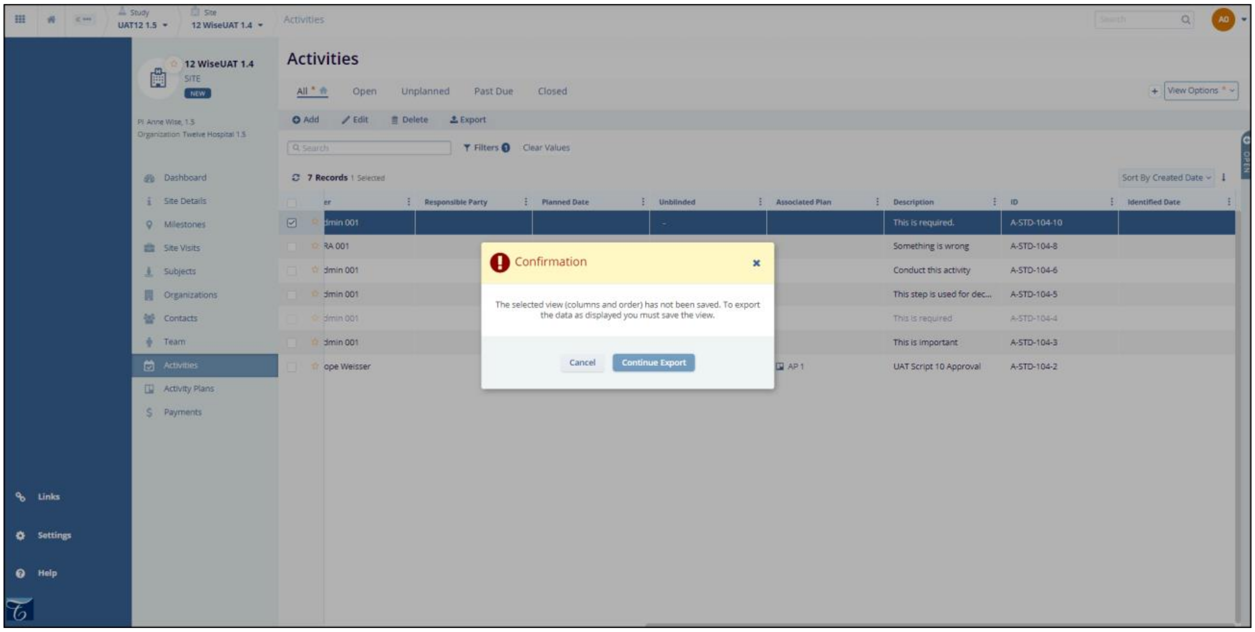
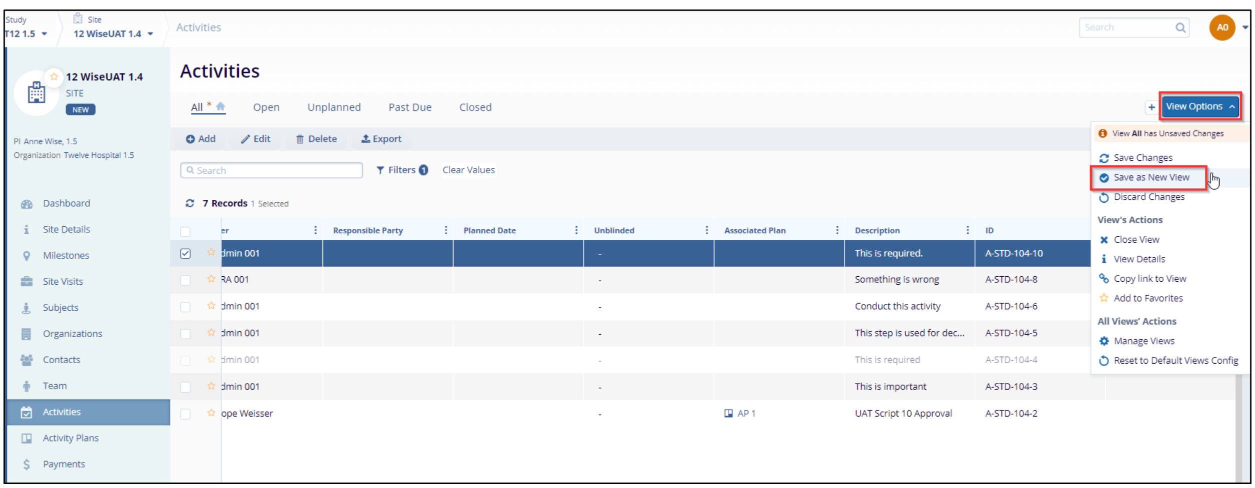
10. Observe that the **All** button displays an yellow asterisk (*) in the options bar.
11. If you want to export this data, the system asks for a confirmation and you will first have to save the view. Refer to the screenshot below.



12. Select the **View Options** dropdown menu to save the view.
    a. This displays the options – Save Changes, Save as New View, Discard Changes and so on.



13. Select the **Save as New View** option.
    a. This opens the Save as New View window.
14. Enter a name in the **View Name** field as indicated by an asterisk (*).

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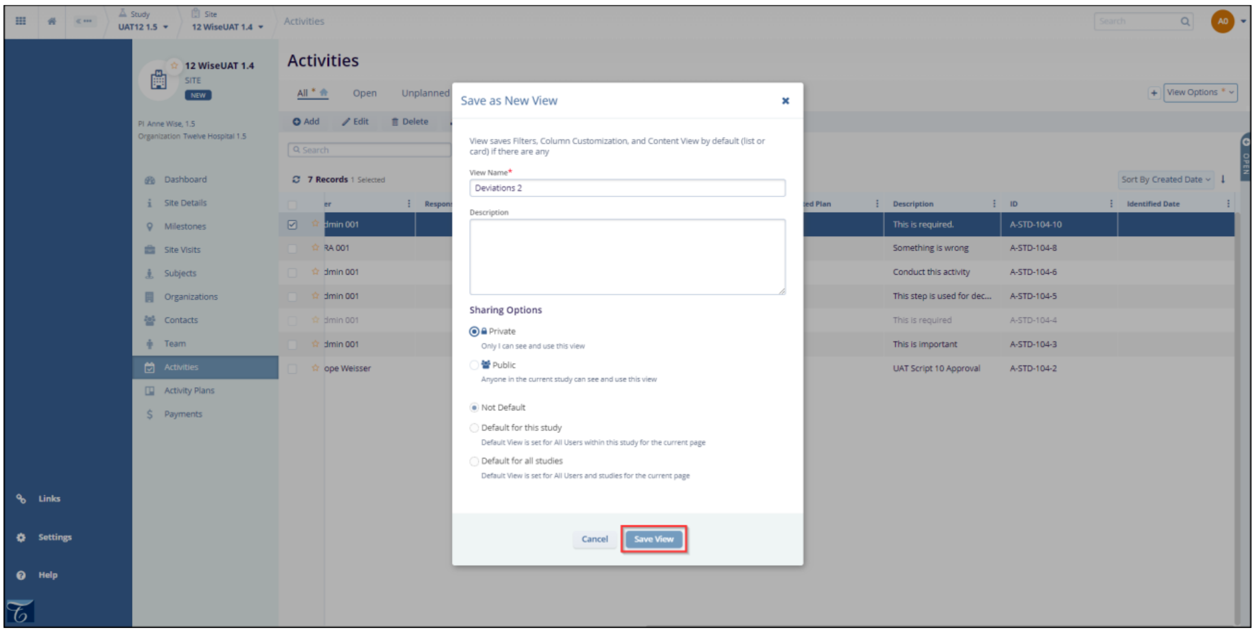
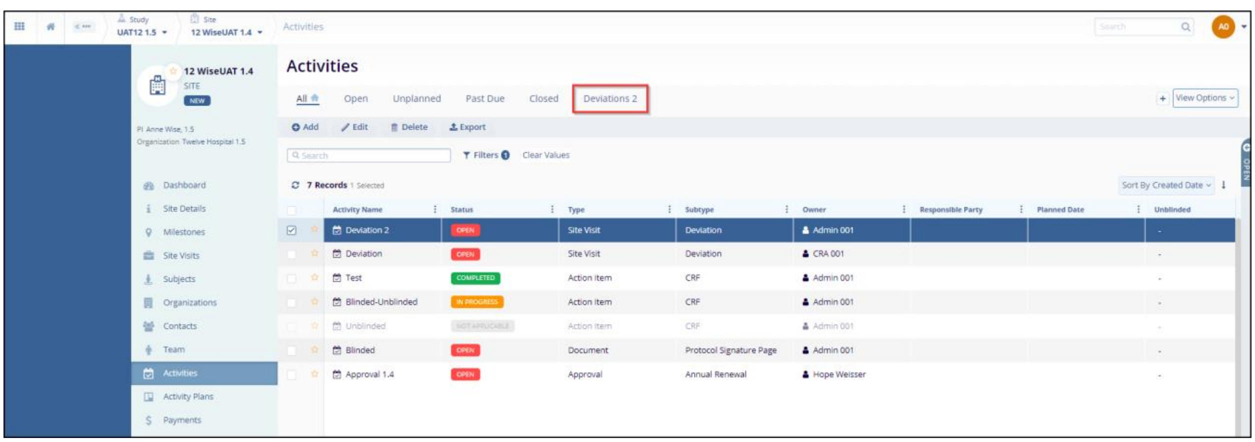
15. (Optional) Enter the Description in the Description field.
16. Select an appropriate radio button from the **Sharing Options**.
    a. If **Private** radio button is selected, the last 3 radio buttons are disabled and after saving, the view is displayed only for you.
    b. If **Public** radio button is selected, the last 3 radio buttons are enabled and after saving, the view is displayed for all.
17. Select the radio button(s) as required.
18. Click the **Save View** button in the window. Refer to the screenshot below.



19. The view is now displayed in Options menu bar. Refer to the screenshot below.



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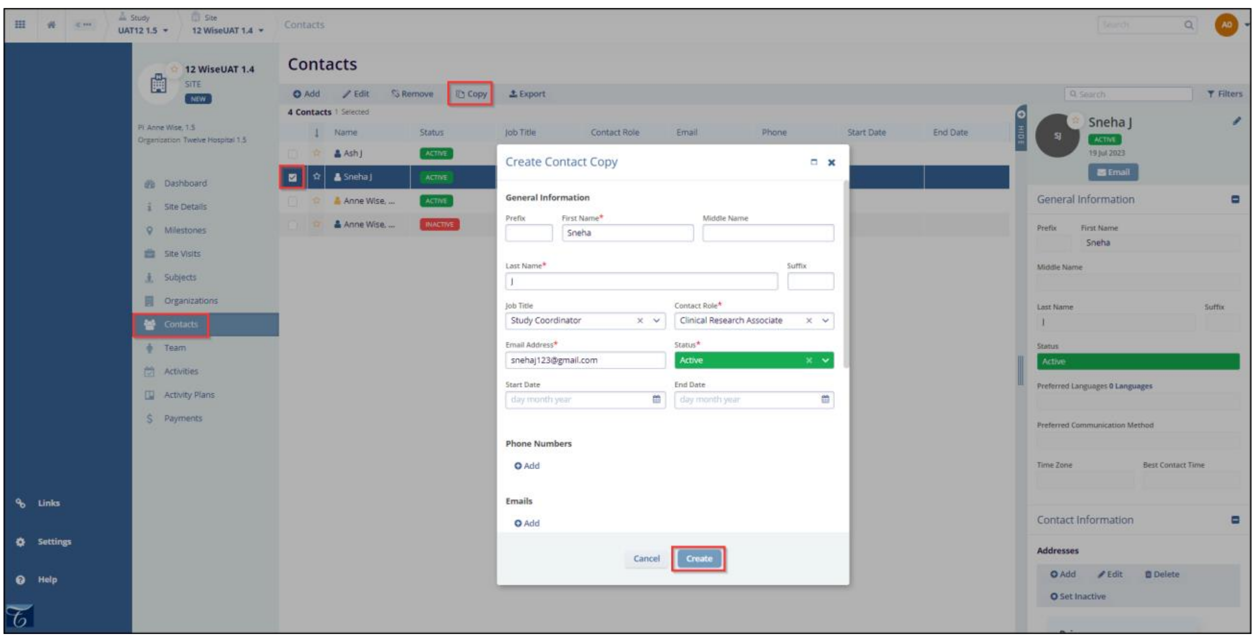
Create Contact Copy

A contact can be copied and made a duplicate of it. Follow the steps below to create a contact copy.

1. Click on the **Studies** link in the Navigation menu in the panel at the left side of the screen.
   a. This opens the “Studies” window.
2. Navigate to the Study you want and click on the name field.
   a. This opens the dashboard for the study.
3. Click on the **Sites** link in the Navigation menu at the left side of the screen.
   a. This opens the “Sites” window.
4. Navigate to the site you want and click on the Name field value.
   a. This opens the dashboard for site.
5. Click on the **Contacts** in the Navigation menu in the panel at the left side of the screen.
   a. This opens the “Contacts” window.
6. Select a checkbox in front of the name that you want to copy.
   a. This enables the buttons in the top ribbon bar.
7. Click the Copy button.
8. This opens the create Contact Copy window.
9. (Optional) Change the first and last name fields.
10. Click **Create**. Refer to the screenshot below.



11. A Notification is displayed in the top right corner – The contact details have been created/copied. Refer to the screenshot below.

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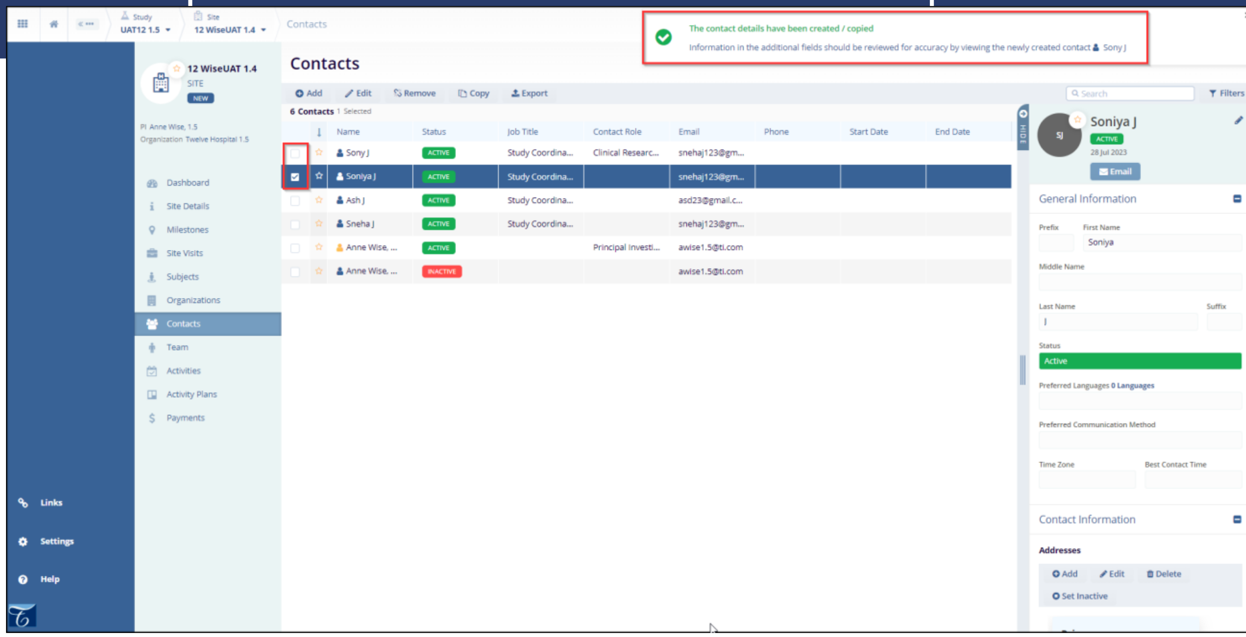

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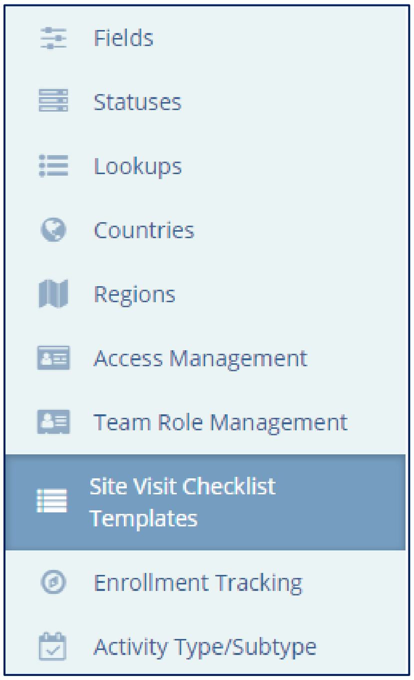
User-Defined Site Visit Checklists

CTMS v1.4 allows Company Administrator users to create, edit, and retire site visit checklists rather than needing to channel all requests through the Trial Interactive Service Desk.

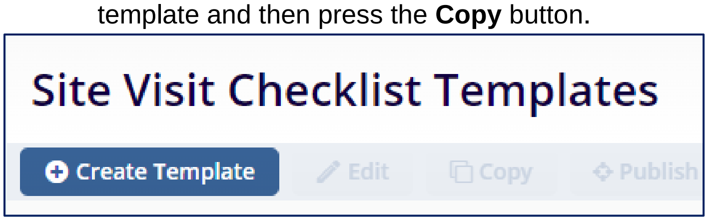
Creating a Site Visit Checklist

To create a Site Visit Checklist:

1. Navigate to the **Settings** area and select the **Site Visit Checklist Templates** option from the navigation links at the left side of the screen.



2. Press the **+Create Template** button at the top of the grid area.
   a. If you are creating a new template as a copy of an existing template, first, select the existing template and then press the **Copy** button.



   b. The ‘Create Site Visit Checklist Template’ window is displayed.

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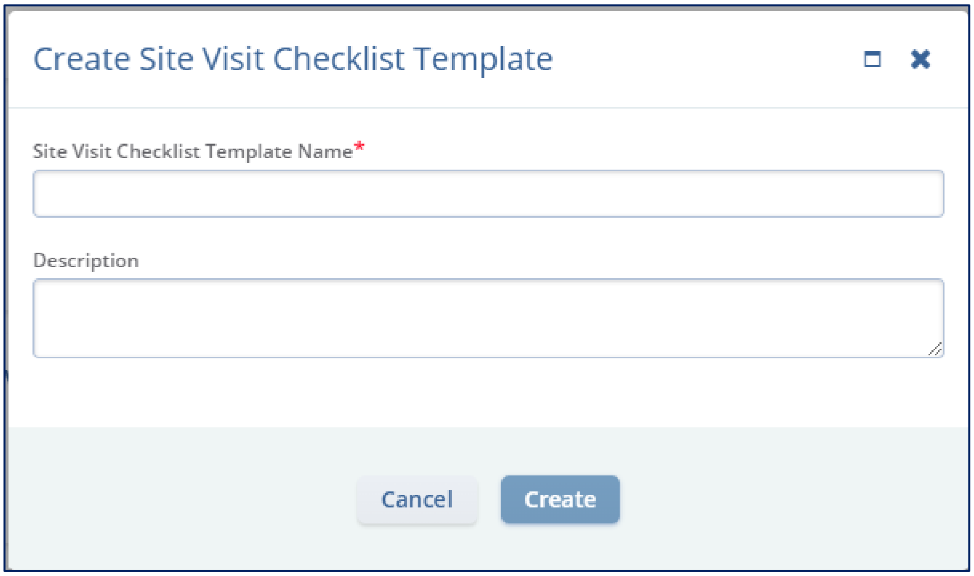
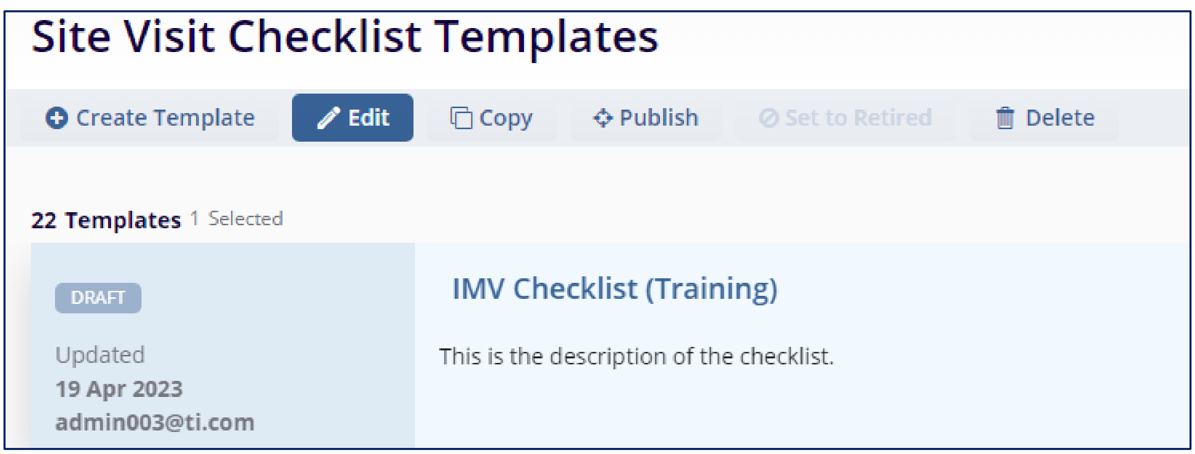


3. Give the site visit checklist template a name and, if desired, a description.
    a. **Note:** We recommend providing a description whenever possible, especially when you may have multiple checklist templates that are similar. The description can assist you in applying the correct checklist when needed.
4. Press **Create**
    a. The window will close and the checklist template will appear in the list.
    b. **Note:** The checklist will be in Draft status initially because we still need to add questions to the checklist before publishing it for use.
5. Select the new checklist from the list.
6. Click **Edit** from the menu bar at the top of the grid.



    a. The checklist profile will load.
    b. **Note:** This can also be done by clicking on the name of the checklist in the grid.

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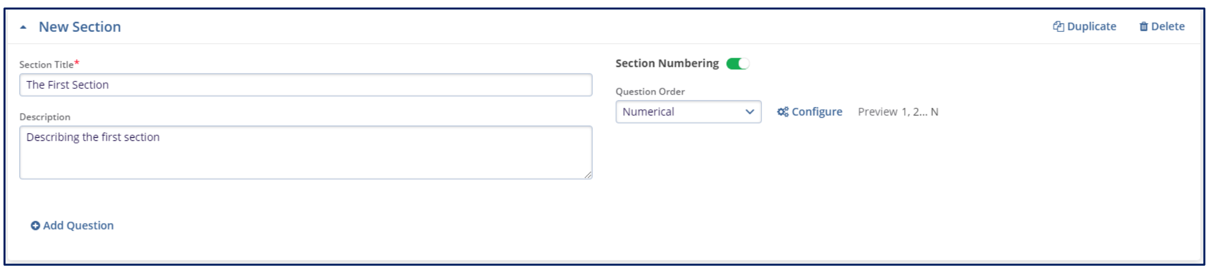
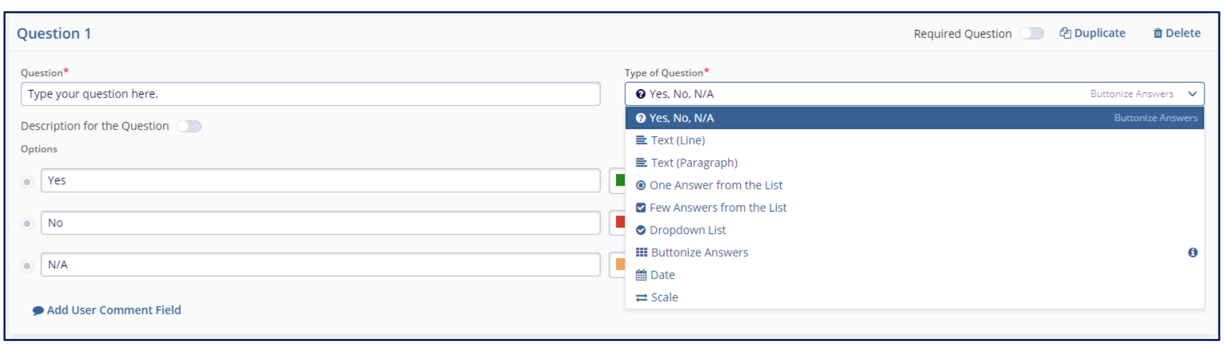
7. Using the toggle switch, indicate if the sections and questions in the checklist should be ordered and, if so, whether the ordering should be alphabetical or numerical.
8. Press **+Add Section**
   a. The new section box will appear.



9. Give the section a title and, if desired, a description.
10. Press the **+Add Question** button in the new section.



11. Type in the question and select the type of question from the dropdown menu.
    a. **Note:** The selection that you make in 'Type of Question' will determine what other elements need to be selected/completed.
12. When the question is ready, press the **Save** button in the menu bar at the top of the screen.
13. Continue adding sections and questions until the checklist is complete.
14. Press **Save.**

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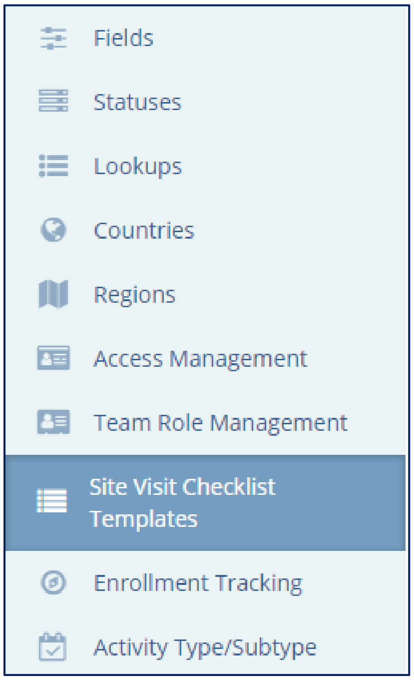
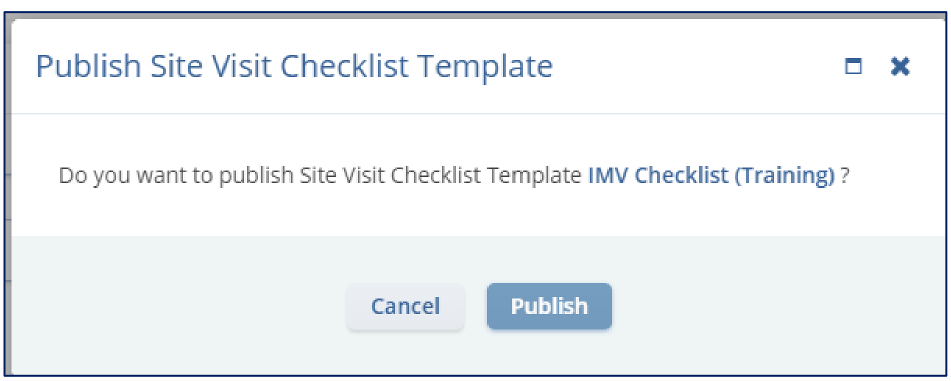
Publishing a Site Visit Checklist

To Publish a Site Visit Checklist Template:

1. Navigate to the **Settings** area and select the **Site Visit Checklist Templates** option from the navigation links at the left side of the screen.



2. Select the checklist from the list displayed.
3. Press the **Publish** button in the menu bar at the top of the screen.
    a. **Note:** This will differ somewhat depending on whether you select the checklist in the list by clicking on the name of the checklist or by clicking elsewhere. Regardless, you'll need to click on the **Publish** button and follow the remaining steps.
    b. The 'Publish Site Visit Checklist Template' window will open.



4. Click **Publish**
    a. The checklist will be displayed in a Published status in the list.

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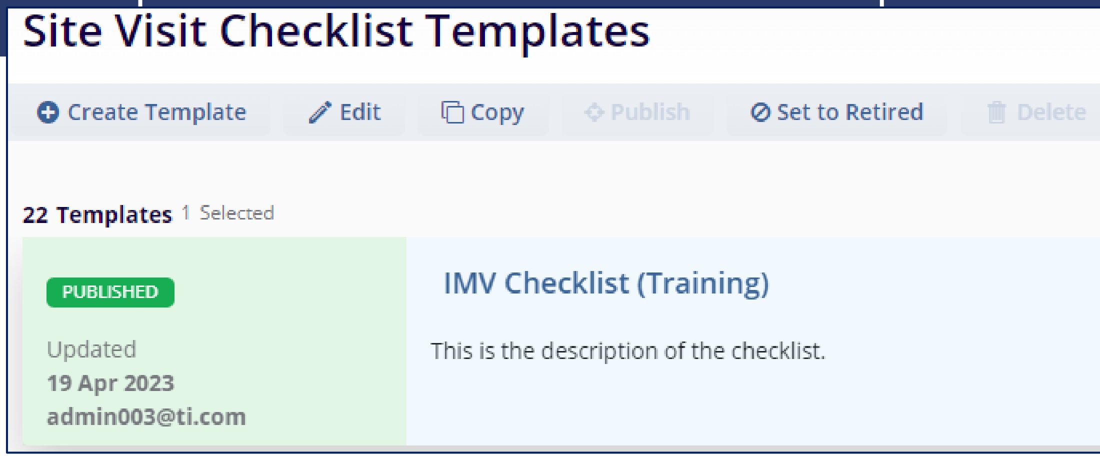
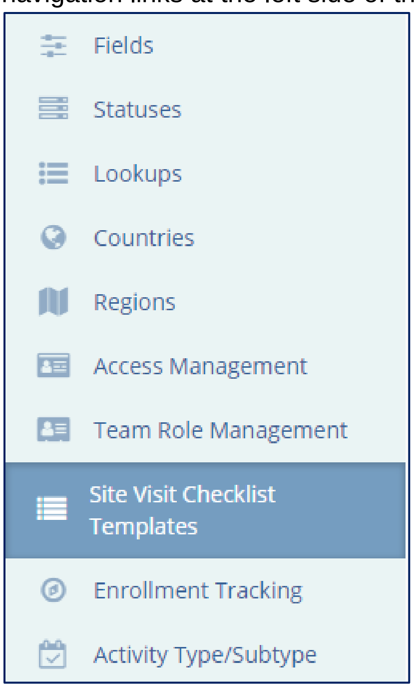


Retiring a Site Visit Checklist

Note: Once a Site Visit Checklist has been retired, it cannot be re-published. You would need to copy the checklist and publish the new copy if you needed to use the checklist again.

To Retire a Site Visit Checklist Template:

1. Navigate to the **Settings** area and select the **Site Visit Checklist Templates** option from the navigation links at the left side of the screen.



2. Select the checklist from the list displayed.

3. Press the **Set to Retired** button in the menu bar at the top of the screen.

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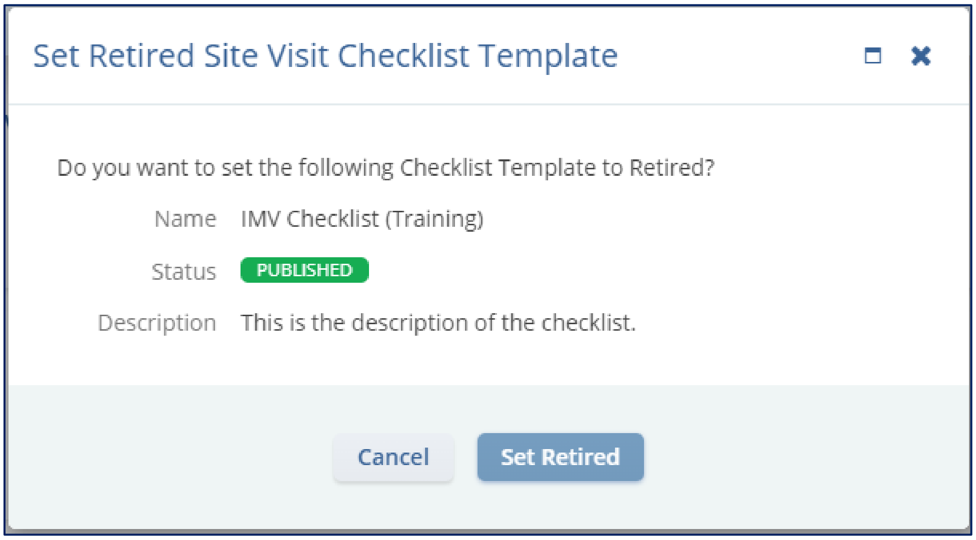
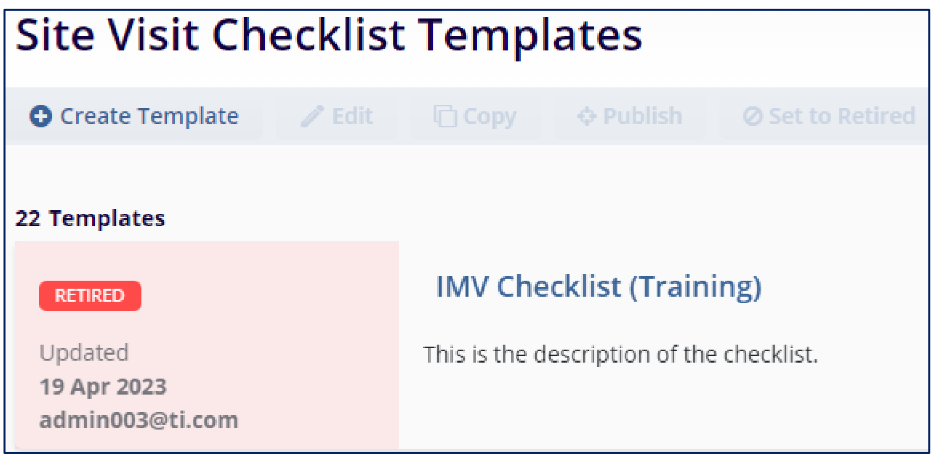
a. **Note:** This will differ somewhat depending on whether you select the checklist in the list by clicking on the name of the checklist or by clicking elsewhere. Regardless, you'll need to click on the **Set to Retired** button and follow the remaining steps.

b. The 'Set Retired Site Visit Checklist Template' window will open.



4. Click **Set Retired**
   a. The checklist will be displayed in a Retired status in the list.



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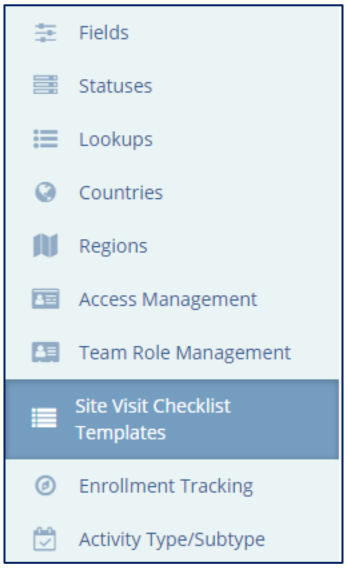
Deleting a Site Visit Checklist

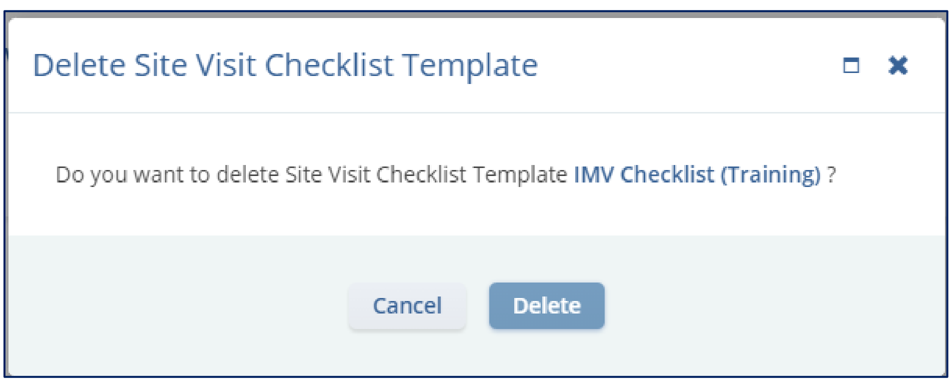
Deleting a site visit checklist can only be done once the checklist has been retired. Please perform those steps before continuing.

To Retire a Site Visit Checklist Template:

1. Navigate to the Settings area and select the Site Visit Checklist Templates option from the navigation links at the left side of the screen.



2. Select the checklist from the list displayed.
3. Press the **Delete** button in the menu bar at the top of the screen.
   a. **Note:** This will differ somewhat depending on whether you select the checklist in the list by clicking on the name of the checklist or by clicking elsewhere. Regardless, you'll need to click on the **Delete** button and follow the remaining steps.
   b. The 'Delete Site Visit Checklist Template' window will open.



4. Click **Delete**
   a. The checklist will be removed from the list.

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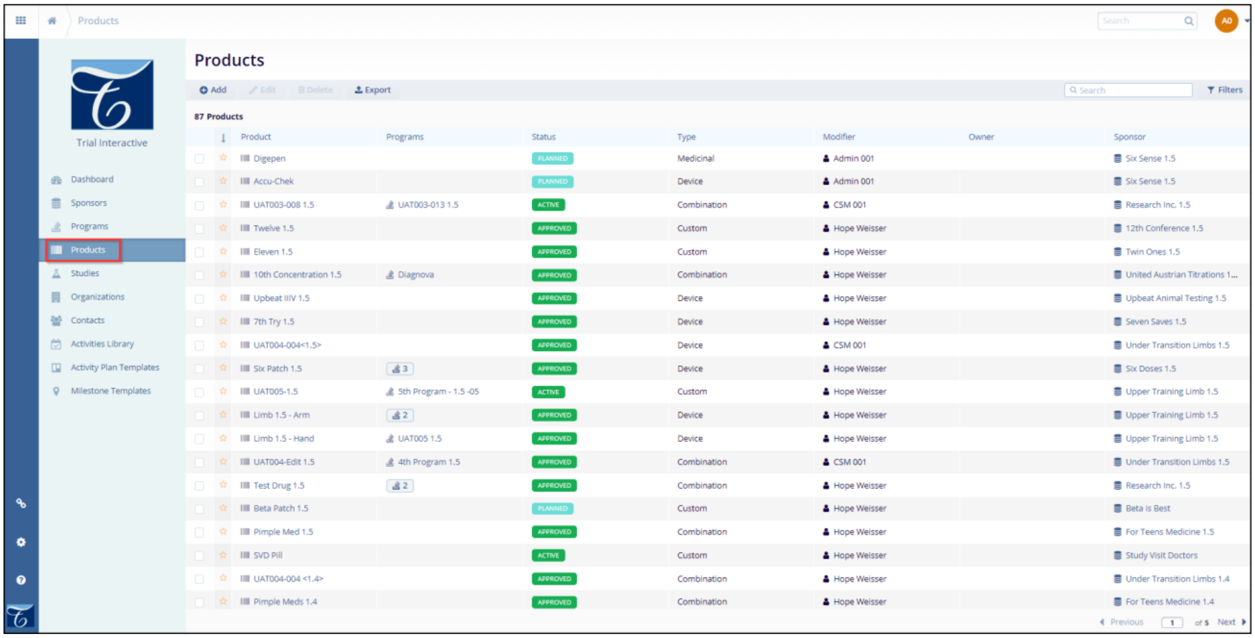
Product

Creating a Product

1. Click on the **Product** link in the Navigation menu at the left side of the screen.
   a. This opens the “Products” window, and the products list is displayed.



2. Click on the **Add** button in the top-left of the screen.
   a. This opens the “Create Product” Window.
3. Here we need to enter the mandatory metadata to create a product i.e., **Product Name, Type, Status, Status Date, Sponsor** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
4. If any of the required fields are missing, an error will appear when we click on the **Create** button, displaying the fields which need to be filled to create a product successfully.

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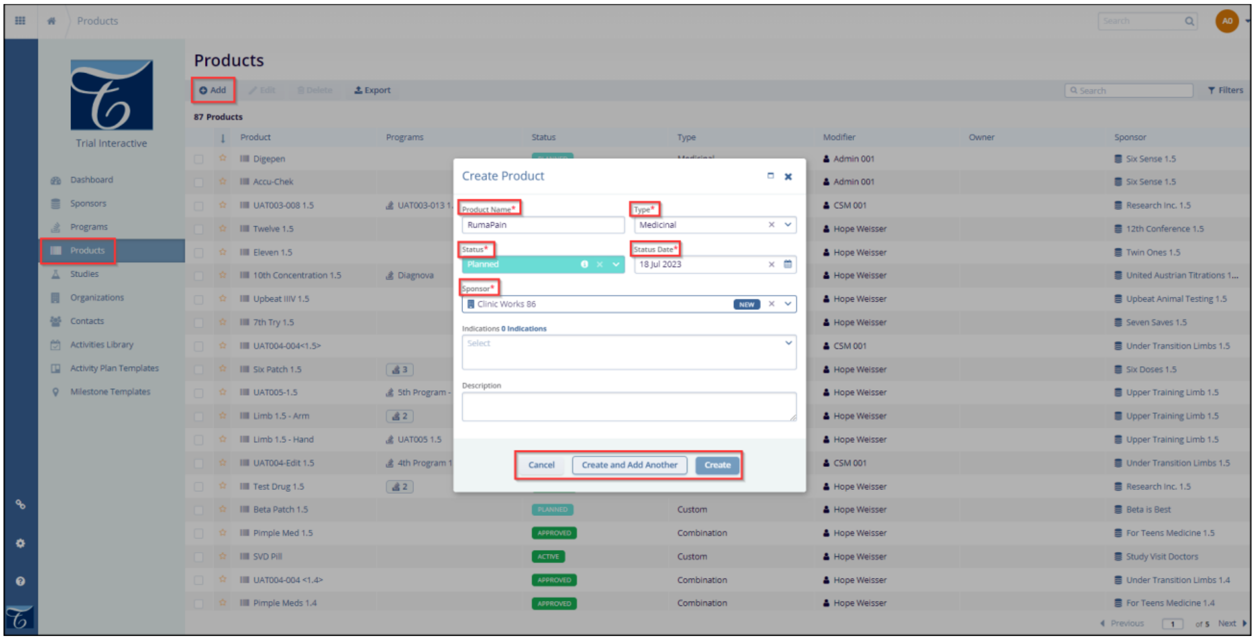
5. **(Optional)** Click Create or **Create and Add Another** depending on whether you intend to create another product right away.



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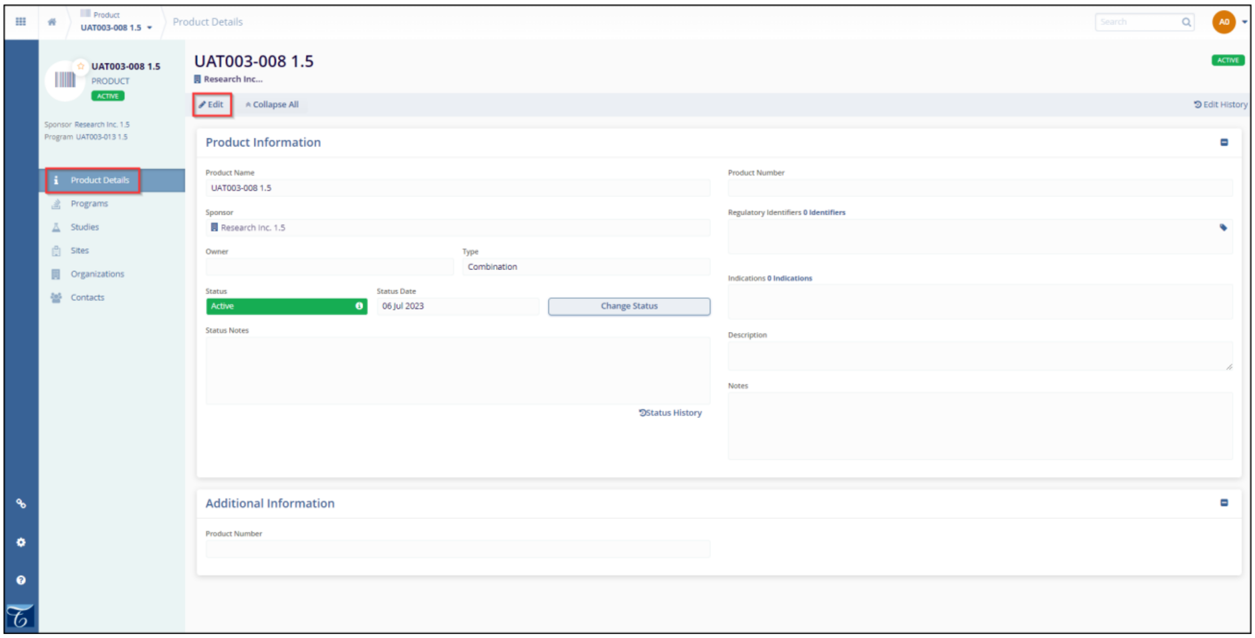
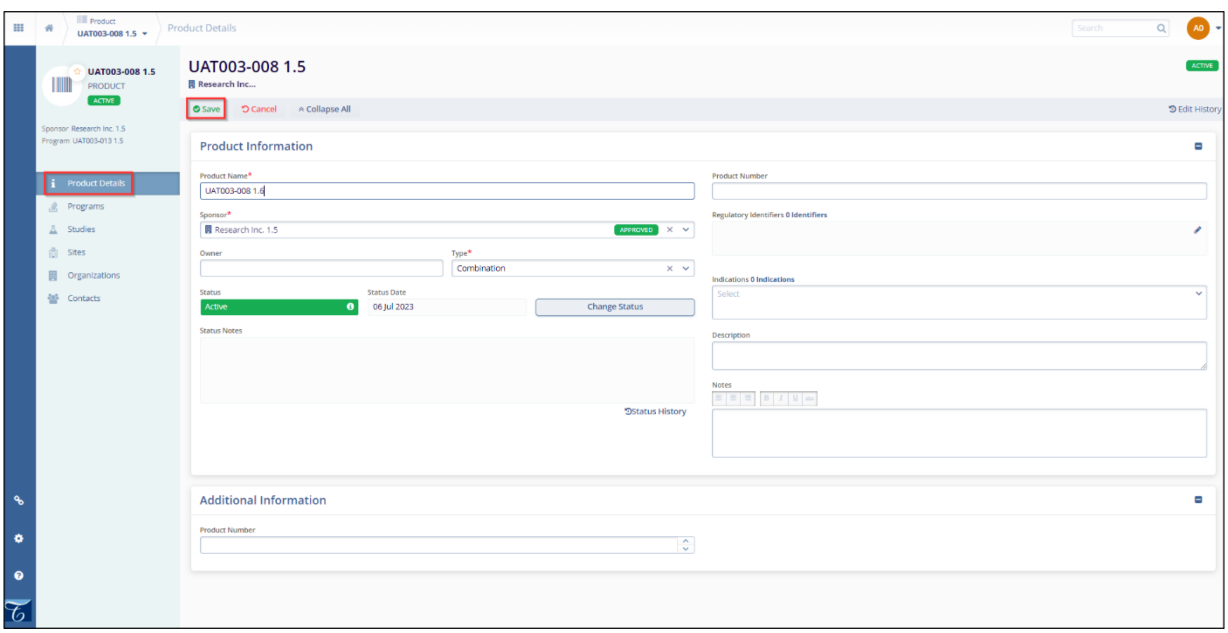
Reviewing and Editing a Product

1. Click on the **Product** link in the Navigation menu at the left side of the screen.
   a. This opens the “Products” window, and the products list is displayed.
2. Click on the name of the product you want to edit.
   a. This opens the “Product Details” window.
3. Click on the **Edit** button in the top-left of the screen.



4. Make the necessary changes in the product details window.
5. Click on the **Save** button in the top-left of the screen.



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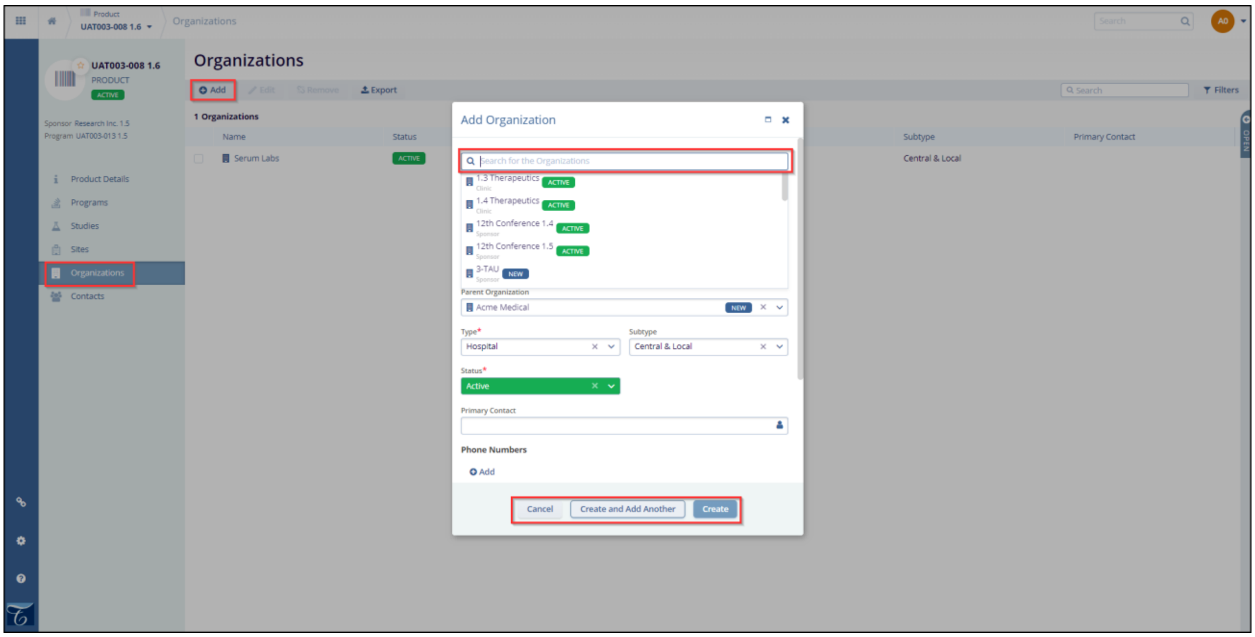
Associating an Organization to a Product

1. Click on the **Product** link in the Navigation menu at the left side of the screen.
   a. This opens the "Products" window, and the products list is displayed.
2. Click on the name of the Product you want to associate to an organization.
   a. This opens the "Product Details" window.
3. Click on the **Organizations** link in the Navigation menu at the left side of the screen.
   a. This opens the "Organization" window.
4. Click **Add** and either search for an existing organization or create a new one.
5. Press **Create** when done.
   a. More detailed instructions on this step can be found here.



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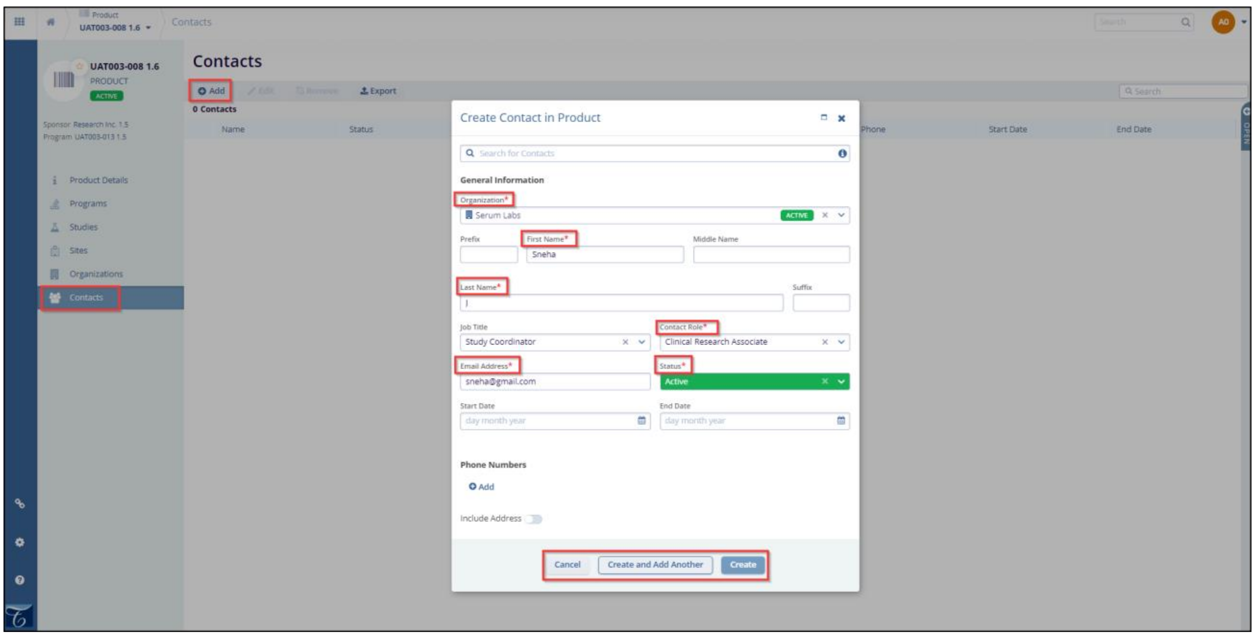
Associating a Contact to a Product

1. Click on the **Product** link in the Navigation menu at the left side of the screen.
    a. This opens the “Products” window, and the products list is displayed.
2. Click on the name of the product to which you wish to associate a contact.
    a. This opens the “Product Details” window.
3. Click on the **Contacts** link in the Navigation menu at the lleft side of the screen.
    a. This opens the ‘Contact’ window.
4. Click **Add** and either search for an existing Contact or create a new one.
5. Here we need to enter the mandatory metadata to create a contact i.e., **Organization**, **First Name, Last Name, Contact Role, Email Address,** and **Status,** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
6. Press **Create** when done.
    a. More detailed instructions on this step can be found here.



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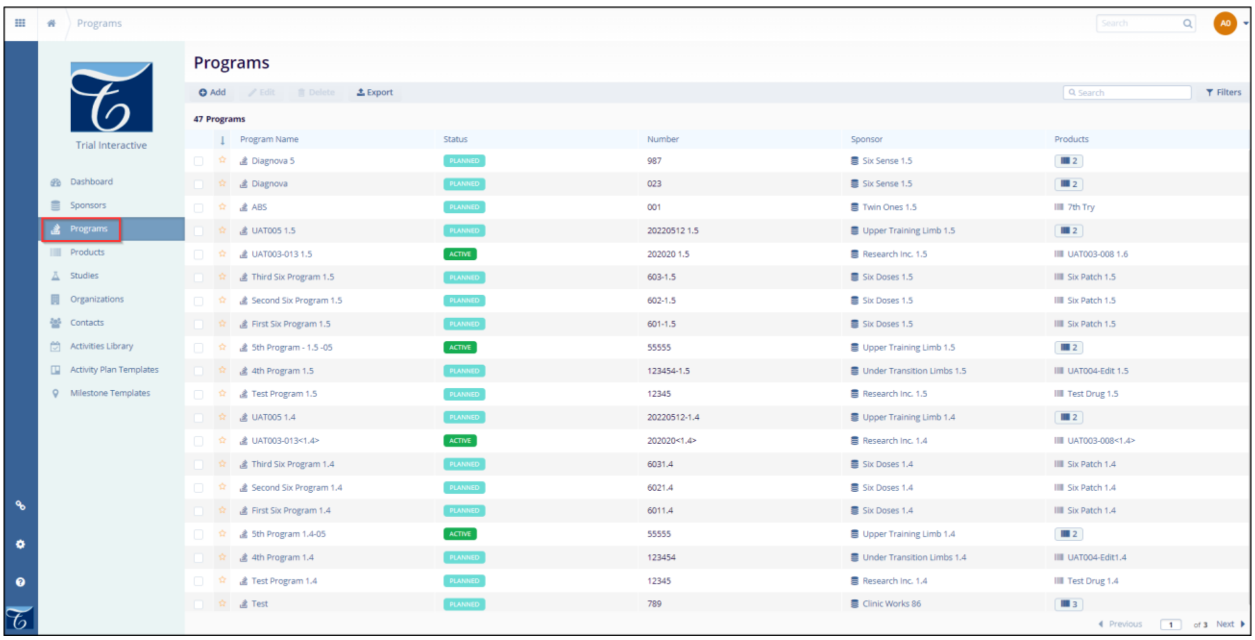
Program

Pre-Requisites

Each Organization will need to decide who should handle Program creation and managing. It may be a specific group of people in the organization who are assigned to handle this to reduce the chances of creating duplicate program records. Company administrators will need to assign CREATE, UPDATE, EDIT and DELETE permissions/privileges to user’s accounts to that they can perform this step.

Create a Program

1. Click on the **Programs** link in the Navigation Menu at the left side of the screen.
   a. This opens the “Programs” window, and the programs list is displayed.



2. Click on the **Add** button in the top-left of the screen.
   a. This opens the **Create Program** window.
3. Here we need to enter the mandatory metadata to create a program i.e., **Program Name, Number, Status, Status Date, Sponsor, Products** and **Test** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
4. If any of the required fields are missing, an error will appear when we click on the **Create** button, displaying the fields which need to be filled to create a program successfully.

5. (Optional) Click **Create** or **Create and Add Another** depending on whether you intend to create another program right away.

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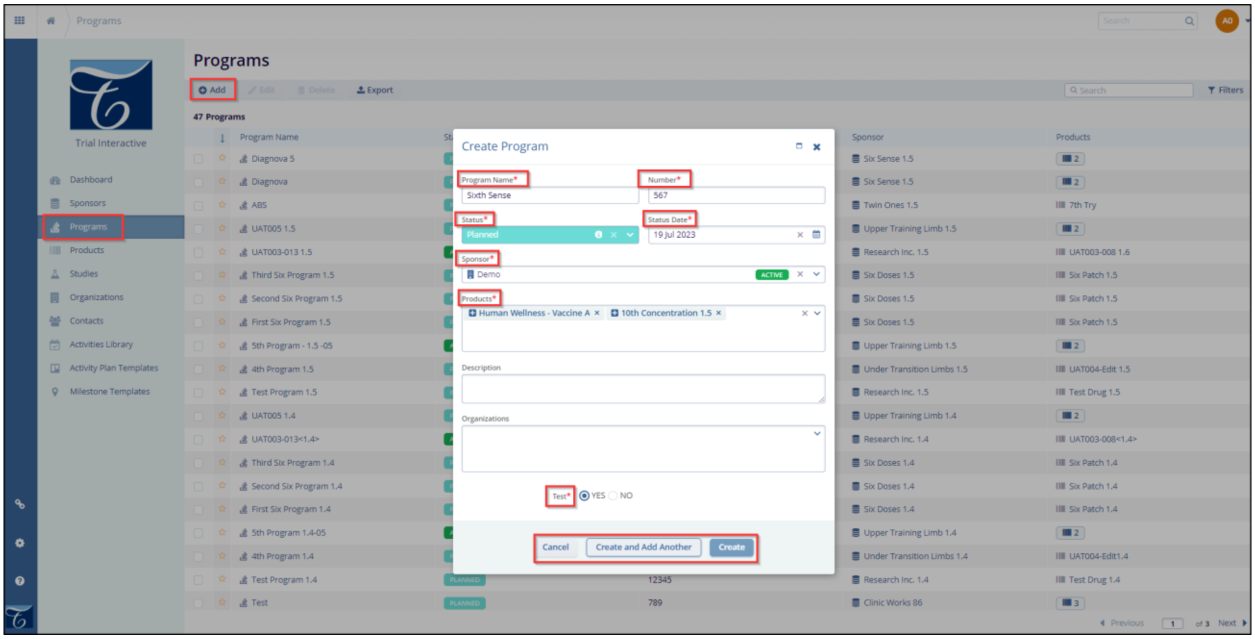
Note: Program records can be created in multiple locations within the system:

1. Programs
2. Sponsors → Programs
3. Product → Programs



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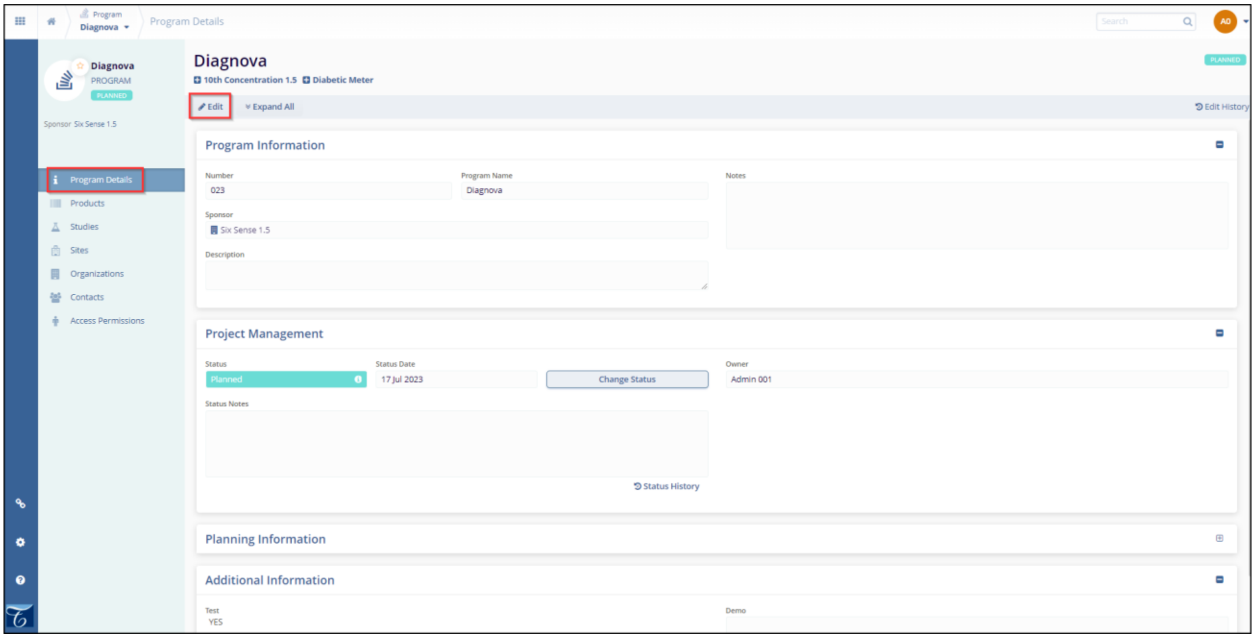
Reviewing and Editing a Program

1. Click on the **Programs** link in the Navigation Menu at the left side of the screen.
   a. This opens the “Programs” window, and the programs list is displayed.
2. Navigate to the program you want to review or edit and click on the name.
   a. This opens the “Program Details” window.
3. Click on the **Edit** button in the top-left of the screen.



4. Make any necessary changes in the sections you want.
5. **(Optional)** If required, Click the **Change Status** button in the ‘Project Management’ tab to change the status of the program.

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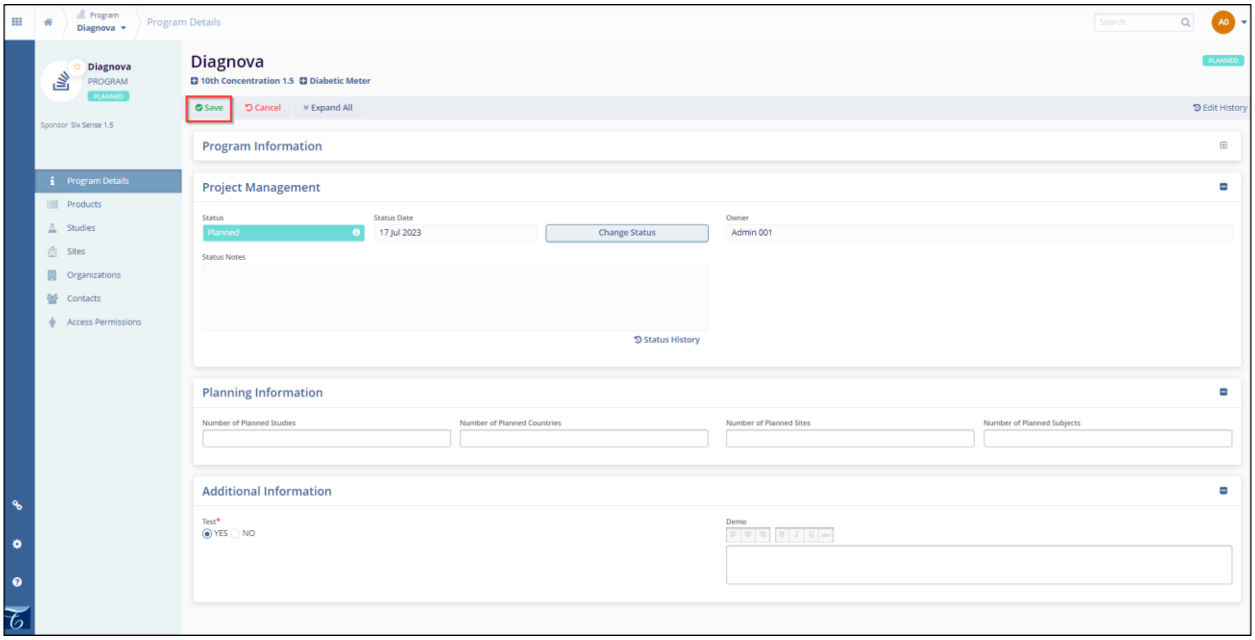
6. **(Optional)** If required, Change the option of the radio button in the 'Additional Information' tab.
7. Click on the **Save** button on the top-left of the screen, for the changes to apply.



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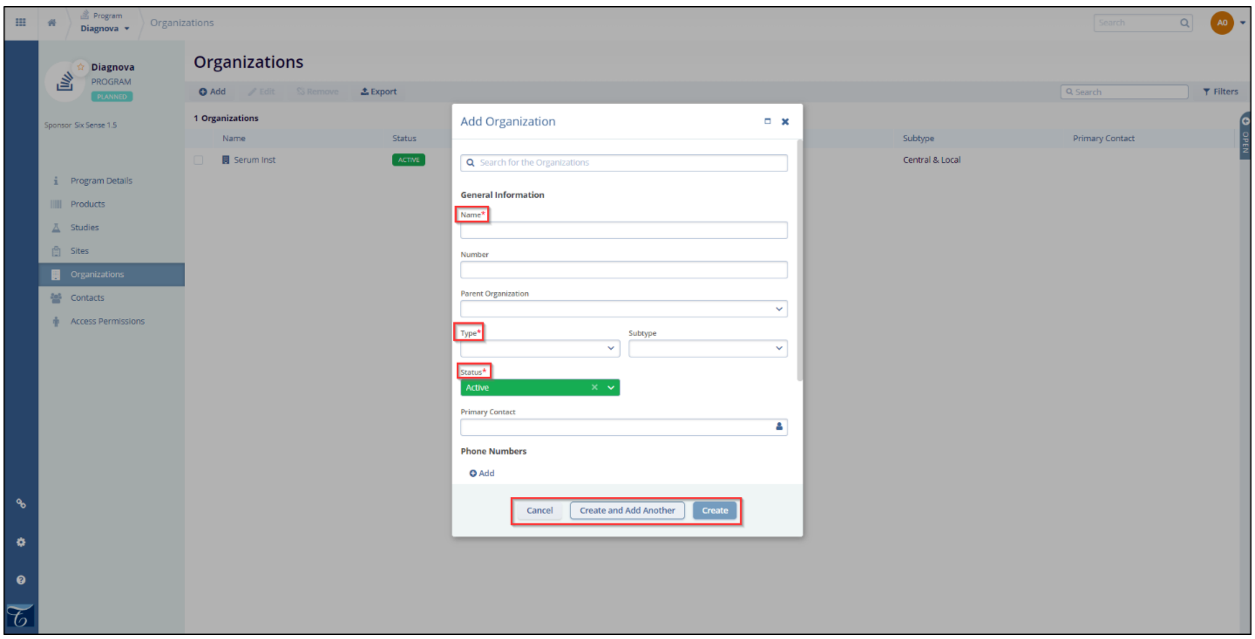
Associating an Organization to a Program

1. Click on the **Programs** link in the Navigation Menu at the left side of the screen.
   a. This opens the "Programs" window, and the programs list is displayed.
2. Click on the name of the program to which you wish to associate an organization.
   a. This opens the "Program Details" window.
3. Click on the **Organization** link in the Navigation menu at the left side of the screen.
   a. This opens the "Organization" window, and the organization list is displayed.
4. Click **Add** and either search for an existing organization or create a new one.
5. Here we need to enter the mandatory metadata to create a program i.e., Name, Type, Status, as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
6. If any of the required fields are missing, an error appears when clicked on the Create button, displaying the fields which need to be filled to create a program successfully.
7. Press **Create** when done.
   a. More detailed instructions on this step can be found here.



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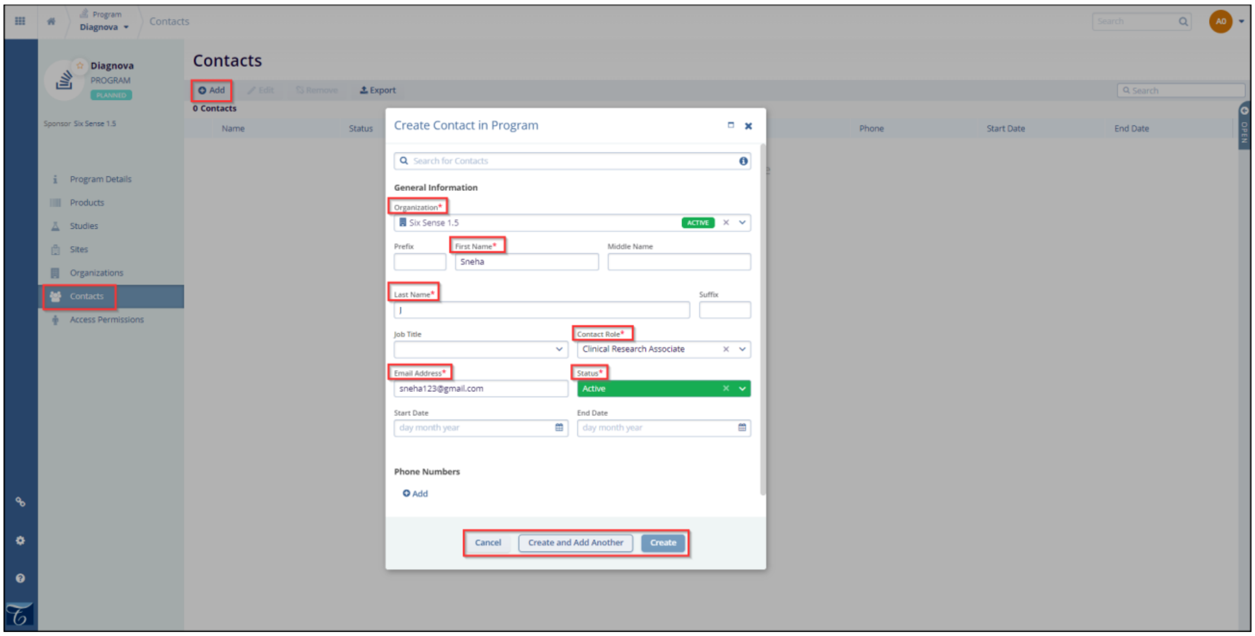
Associating a Contact to a Program

1. Click on the **Programs** link in the Navigation Menu at the left side of the screen.
   a. This opens the "Programs" window, and the programs list is displayed.
2. Click on the name of the program to which you wish to associate a contact.
   a. This opens the "Program Details" window.
3. Click on the **Contacts** link in the Navigation menu at the left side of the screen.
   a. This opens the "Contacts" window, and the contacts list is displayed.
4. Click on the **Add** button in the top-left of the screen.
   a. This opens **Create Contact in program** window.



5. Here we need to enter the mandatory metadata to create a Contact i.e., **Organization, First Name, Last Name, Contact Role, Email Address, Status,** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
6. If any of the required fields are missing, an error will appear when we click on the **Create** button, displaying the fields which need to be filled to create a contact successfully.
7. (Optional) Click **Create** or **Create and Add Another** depending on whether you intend to create another contact right away.

Note: The search bar at the top of the "Create Contact in program" window can be used to search for an existing CTMS contact record for associate to the program.

Note: The system will restrict the level of data that can be updated to only information relevant to the association of the contact to the program. All other data will need to be updated at the Home > Contacts level.

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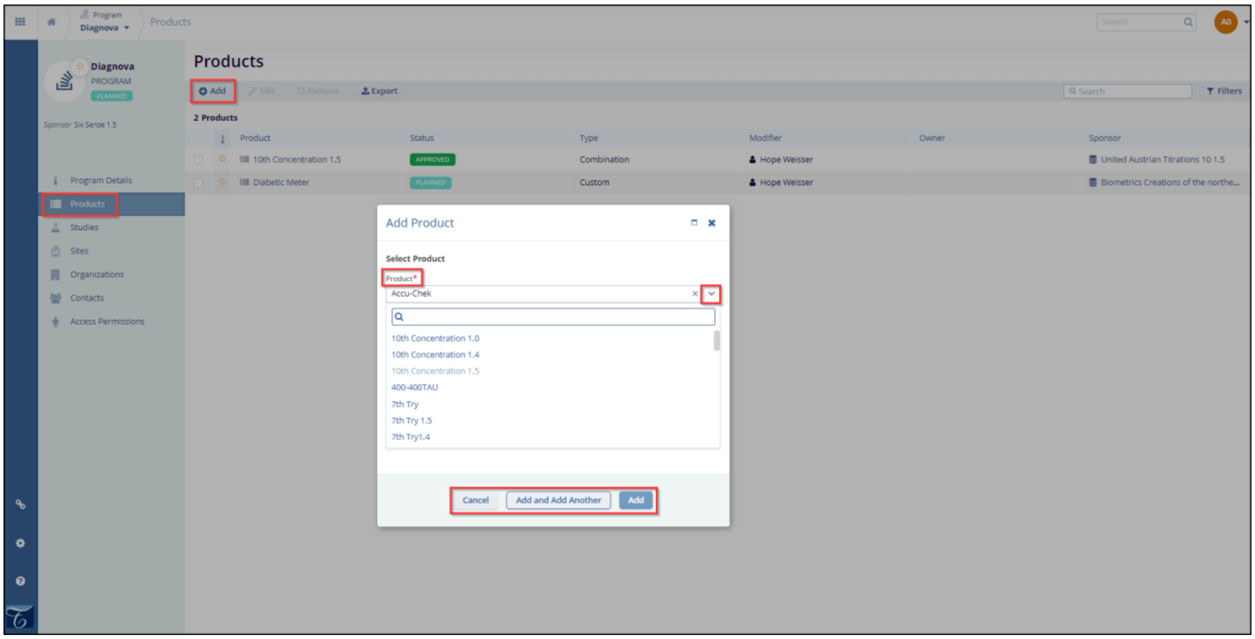
Associating a Product to a Program

1. Click on the **Programs** link in the Navigation Menu at the left side of the screen.
   a. This opens the “Programs window”, and the programs list is displayed.
2. Click on the name of the program you want to associate to a product.
   a. This opens the **Program Details** window.
3. Click on the **Products** link in the Navigation menu at the left side of the screen.
   a. This opens the “Products” window, and the products list is displayed.
4. Click the **Add** button in the top-left of the screen.
   a. This opens **Add Product** window.
5. Select a product from the available products list.



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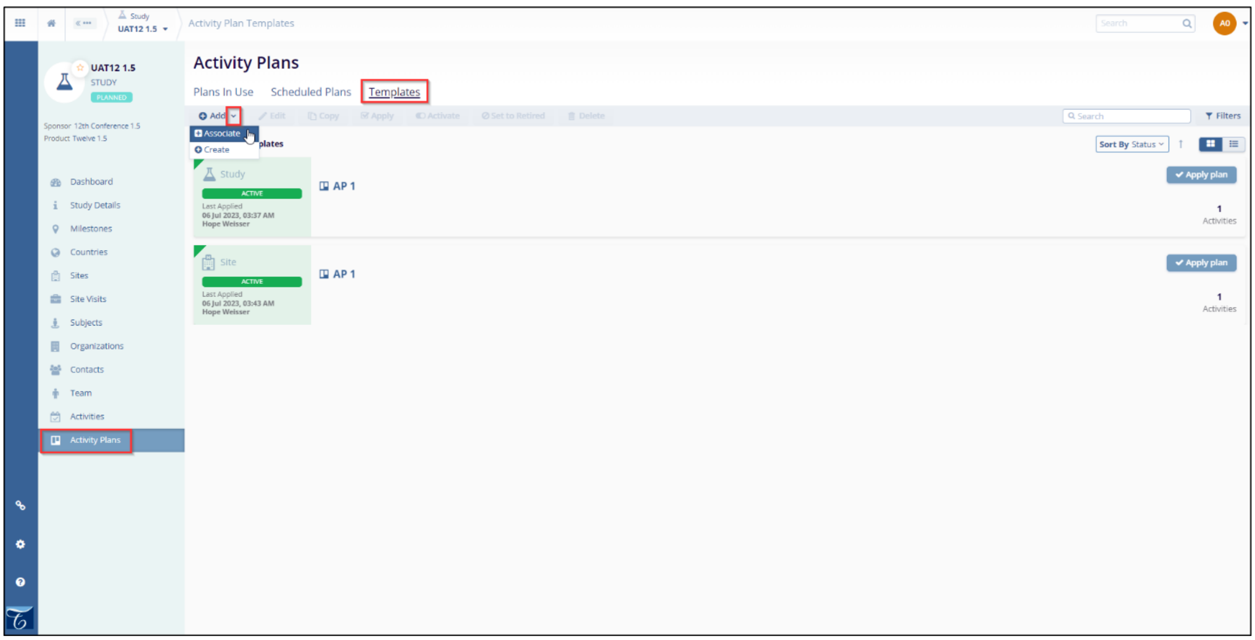
Activities

Associating Domain library Activity Records to a Study

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
   a. This opens the “Studies” window.
2. Click on the name of the study.
   a. This opens dashboard for the study.
3. Click on the **Activity Plans** link in the Navigation menu at the left side of the screen.
   a. This opens the “Activity Plans” window.
4. Click on **Templates** in the top-left center of the screen.
   a. This opens the “Templates” window.
5. Click on the **Add** button in the top-left of the screen.
   a. Now click on **Associate** from the dropdown menu.



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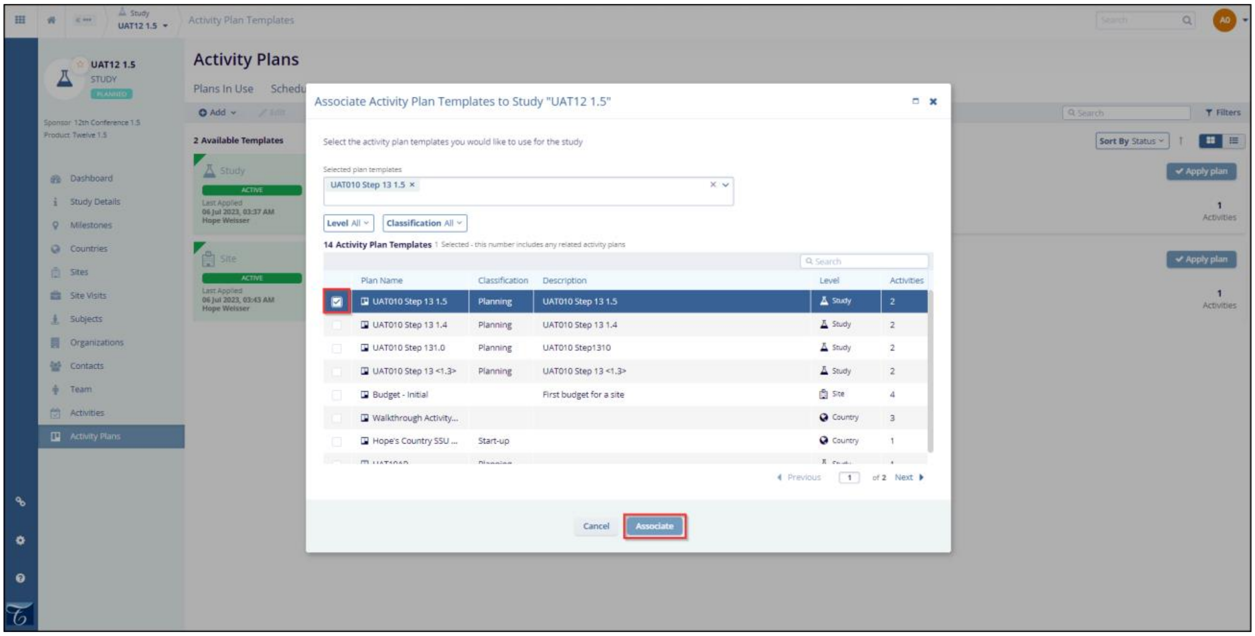
6. This opens the **Associate Activity Plan Templates to study** “Study name is displayed”.



7. Click on the **check box** before the plan name you want to associate to a study.
8. Click on the **Associate** button in the bottom of the **Associate Activity Plan Template**.

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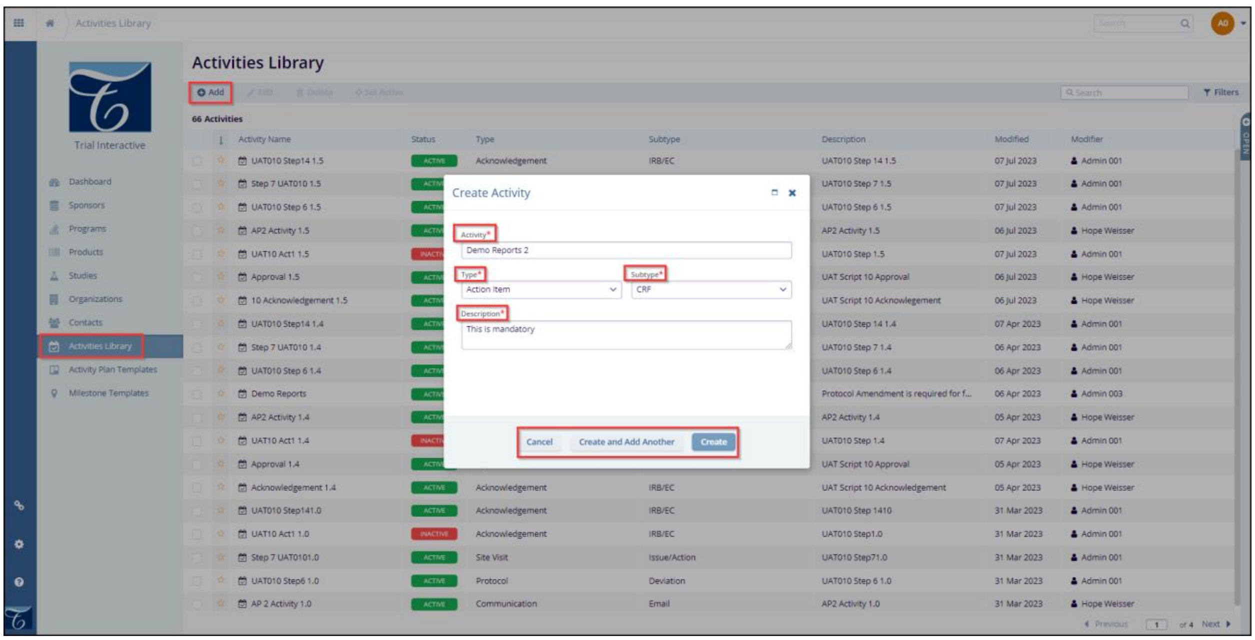
Creating Domain library Activity Records

1. Click on the **Activities Library** link in the Navigation menu at the left side of the screen.
   a. This opens the “Activities Library” window.
2. Click on the **Add** button in the top-left of the screen.
   a. This opens the **Create Activity** window.
3. Here we need to enter the mandatory metadata to create an Activity i.e., **Activity, Type, Sub Type, Description** as indicated by an asterisk (*) symbol next to the field title.
4. Initially Sub Type is greyed out, once you select a value for the Type from the dropdown menu the related values for the sub type appears in the dropdown menu.
5. If any of the required fields are missing, an error will appear when we click on the **Create** button, displaying the fields which need to be filled to create an activity successfully.
6. **(Optional)** Click **Create** or **Create and Add Another** depending on whether you intend to create another activity right away.



Activity ID Number

All activities in the CTMS will be given a unique ID number as shown below.

3 Activities

Activity Name	Status	Type	Subtype	Owner	Responsible Party	Planned Date	Associated Plan	Description	ID
Health Wells S...	OPEN	Site Visit	Deviation	CSM 001				First Deviation	A-STD-15-10
Study Submis...	OPEN	Submission	Initial	Hope Weisser			Study Start-Up	Initial submission...	A-STD-15-5
Study Approval	OPEN	Approval	Initial	Hope Weisser			Study Start-Up	Initial study appr...	A-STD-15-6

Editing Domain Library Activity Records

1. Click on the **Activities Library** link in the Navigation menu at the left side of the screen.
   a. This opens the “Activities Library” window.

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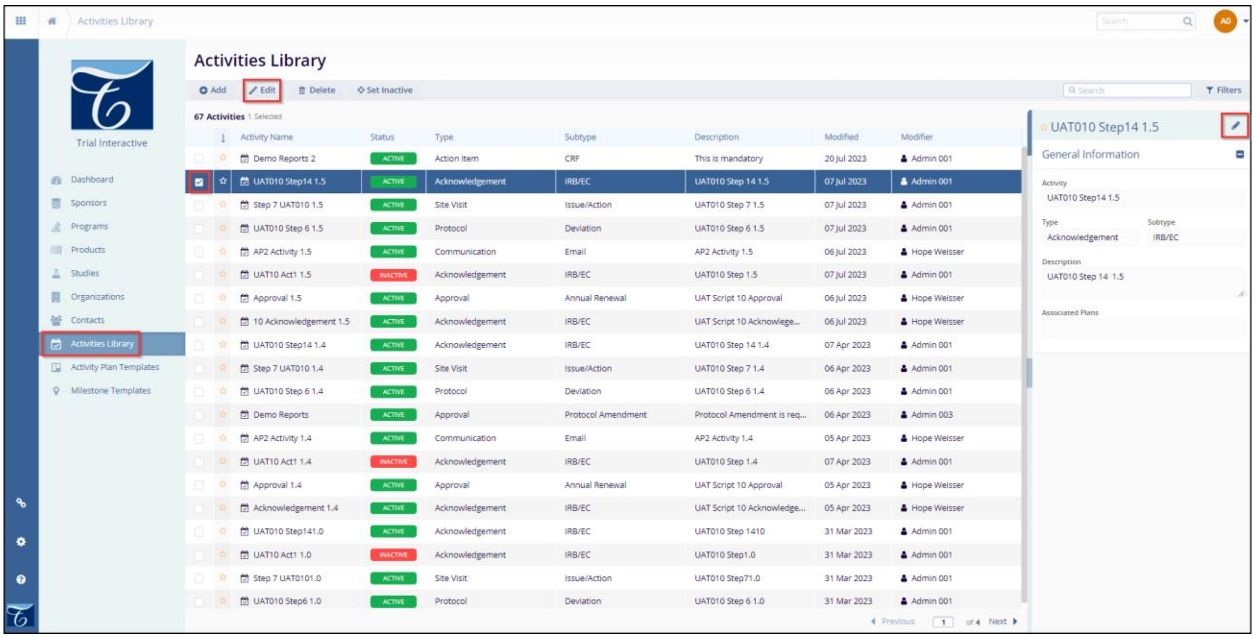
2. Navigate to the activity name you want to edit and click the check box before the activity name or click directly on the activity name.
3. Click on the **Edit** button in the top-left of the screen.
    a. This opens the quick view panel on the right side of the screen.
4. Make necessary changes in the quick view panel.
5. Click on the **Save** button in the bottom right of the screen.

Note: Updates to an activity record will not be reflected within activity plans already actively applied or tracking. Updated activity records will be used for any new application or tracking of an activity plan containing the updated record.



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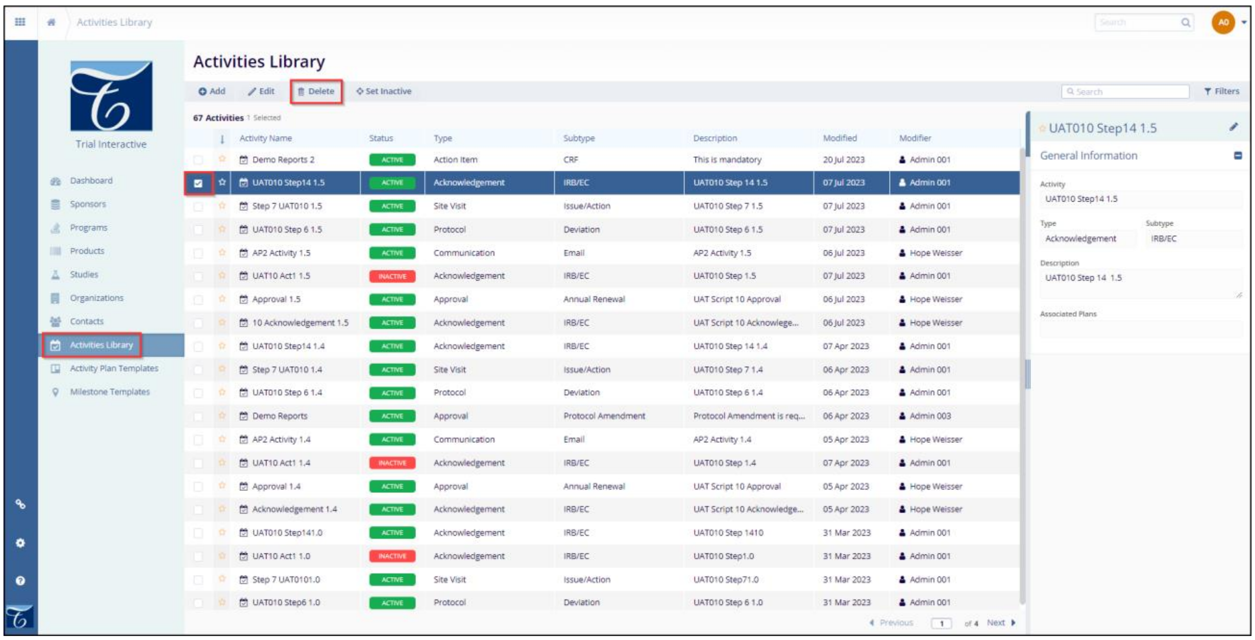
Deleting Domain Activity Records

1. Click on the **Activities Library** link in the Navigation menu at the left side of the screen.
   a. This opens the “Activities Library” window.
2. Navigate to the activity name you want to delete and click the check box before the activity name or click directly on the activity name.
3. Click on the **Delete** button in the top-left of the screen.
4. This deletes the Activity record.

Note: The system will restrict the ability to delete an activity record that is being used within the system, the user should inactive such records and not delete them.



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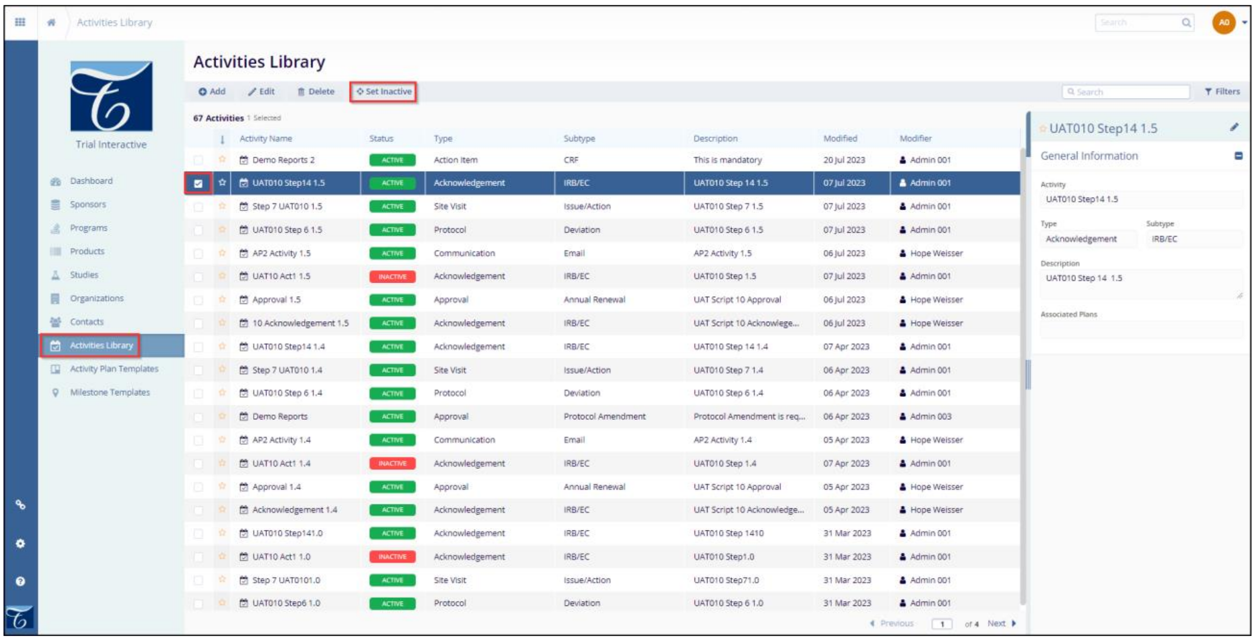
Inactivating Domain Activity Records

1. Click on the **Activities Library** link in the Navigation menu in the panel at the left side of the screen.
   a. This opens the “Activities Library” window.
2. Navigate to the activity name you want to set as Inactive and click the check box before the activity name or click directly on the activity name.
3. Click on the **Set Inactive** button in the top-left of the screen.
4. This Inactivates the Activity record.



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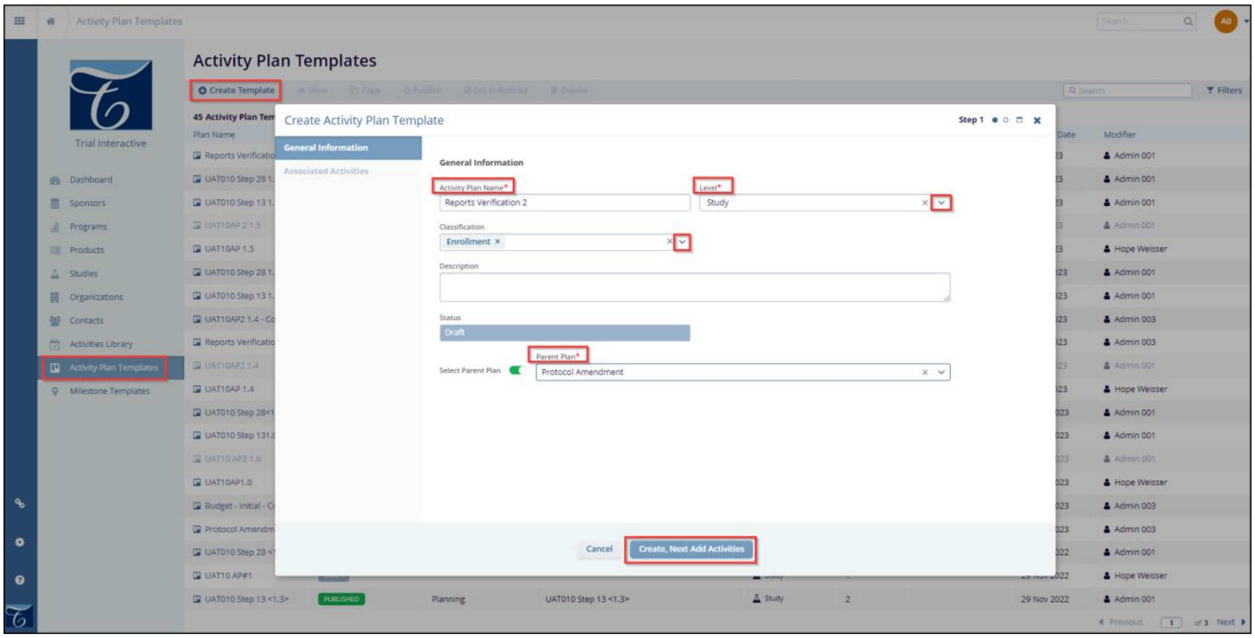
Creating Domain Library Activity Plans

1. Click on the **Activity Plan Templates** link in the Navigation menu in the panel at the left side of the screen.
   a. This opens the "Activity Plans Templates" window.
2. Click on the **Create Template** in the top-left of the screen.
   a. This opens the **Create Activity Plan Template** window.
3. Here we need to enter the mandatory metadata to create an activity plan template i.e., **Activity Plan Name, Level** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information, as necessary.
4. If any of the required fields are missing, an error will appear when we click on the **Next Add Activities** button, displaying the fields which need to be filled to create an activity plan template successfully.



5. This opens the **Associated Activities** window.
6. Click on the **Create** button in the associated activities window.
   a. This opens **Create Activity** window.
7. Here we need to enter the mandatory metadata to create an activity for the template i.e., **Activity, Type, Sub Type, Description** as indicated by an asterisk (*) symbol next to the field title.
8. Initially Sub Type is greyed out, once you select a value for the Type from the dropdown menu the related values for the sub type will appear in the dropdown menu.
9. If any of the required fields are missing, an error will appear when we click on the **Create** button, displaying the fields which need to be filled to create an activity successfully.

10. **(Optional)** Click **Create** or **Create and Add Another** depending on whether you intend to create another activity right away.

Note: The activity records created in this location will be records within the Activities Library, available for future selection.

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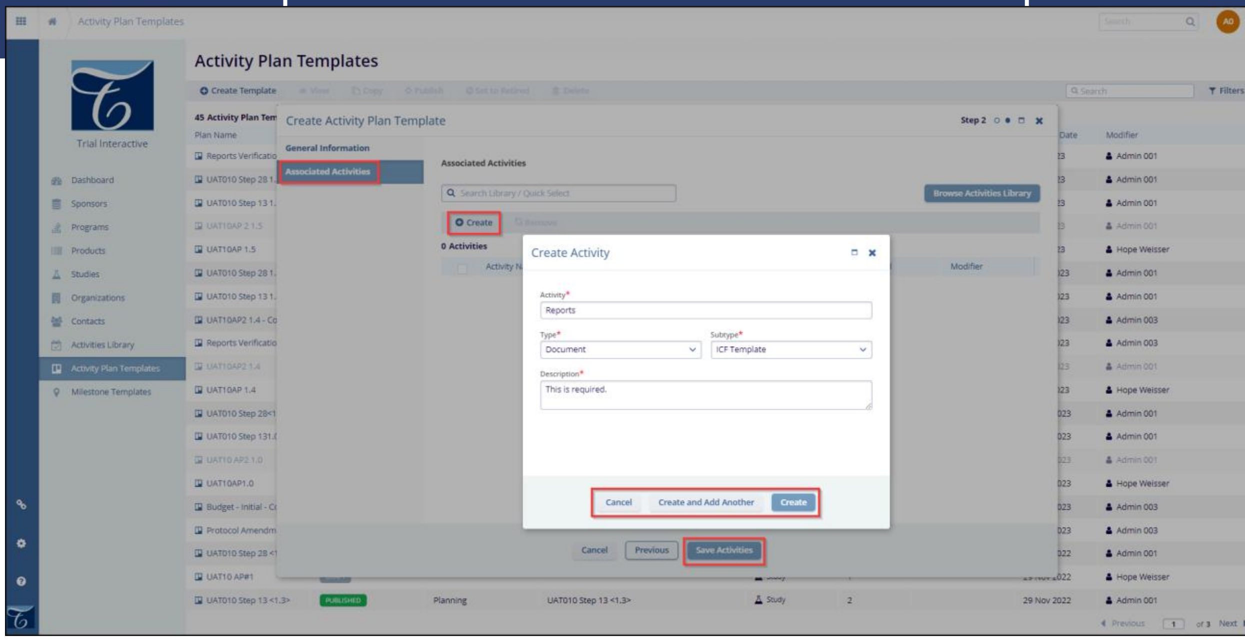

11. Click on the **Save Activities** button in the create activity plan template window.
    a. The create activity plan template closes and a template is created.

Note: Activity plans default to Draft status to allow for review and updates before making the plan available for selection by the user community throughout the system.

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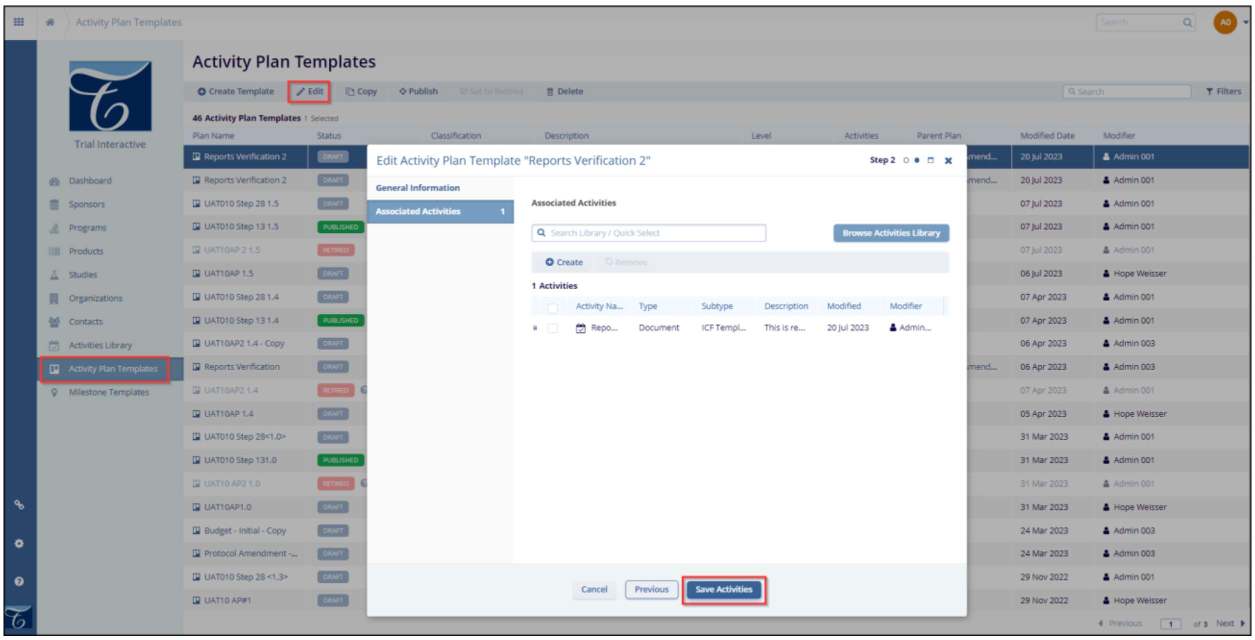
Editing Draft Activity plans

1. Click on the **Activity Plan Templates** link in the Navigation menu in the panel at the left side of the screen.
   a. This opens the “Activity Plans Templates” window.
2. Navigate to the plan you want to edit.
3. Click on the **Edit** button in the top-left of the screen.
   a. This opens the **Edit Activity Plan Template** window.
4. Make any necessary changes in the **Edit Activity Plan Template** window**.**
5. Click on **Save Activities** in the bottom of the edit activity plan template window.



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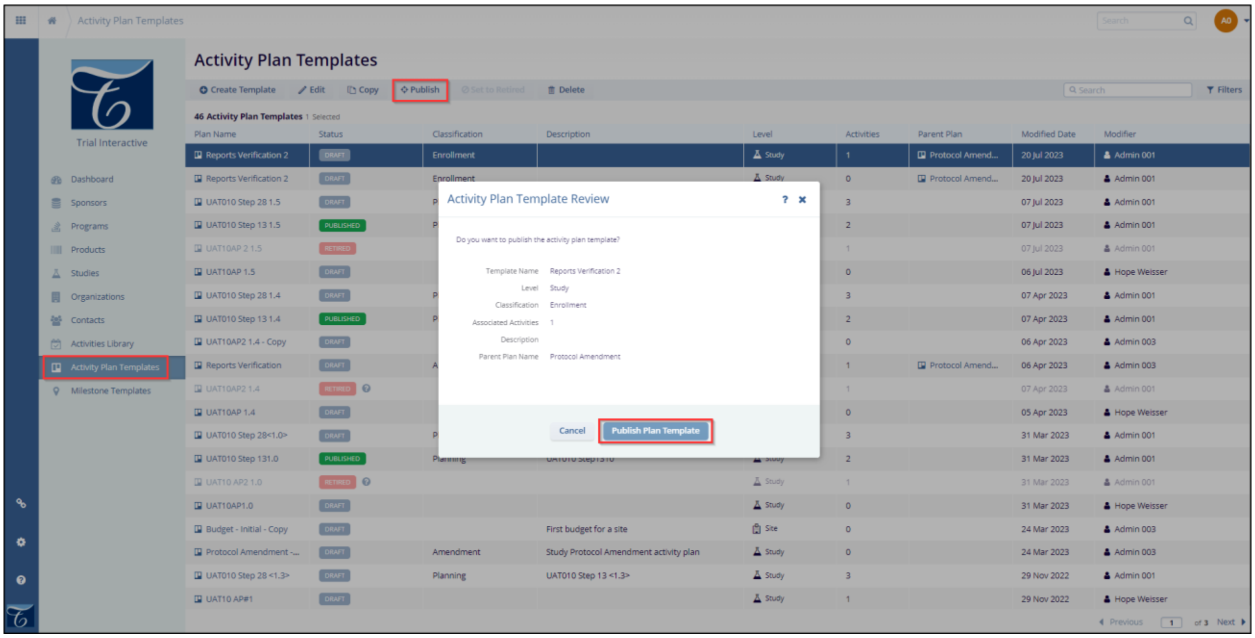
Publishing Activity Plans

1. Click on the **Activity Plan Templates** link in the Navigation menu in the panel at the left side of the screen.
   a. This opens the “Activity Plan Templates” window.
2. Navigate to the plan name which is in **Draft** status you want to publish it and click on it.
3. Click on the **Publish** button in the top-left of the screen.
4. Activity plan is displayed with a status of published and can no longer be updated.



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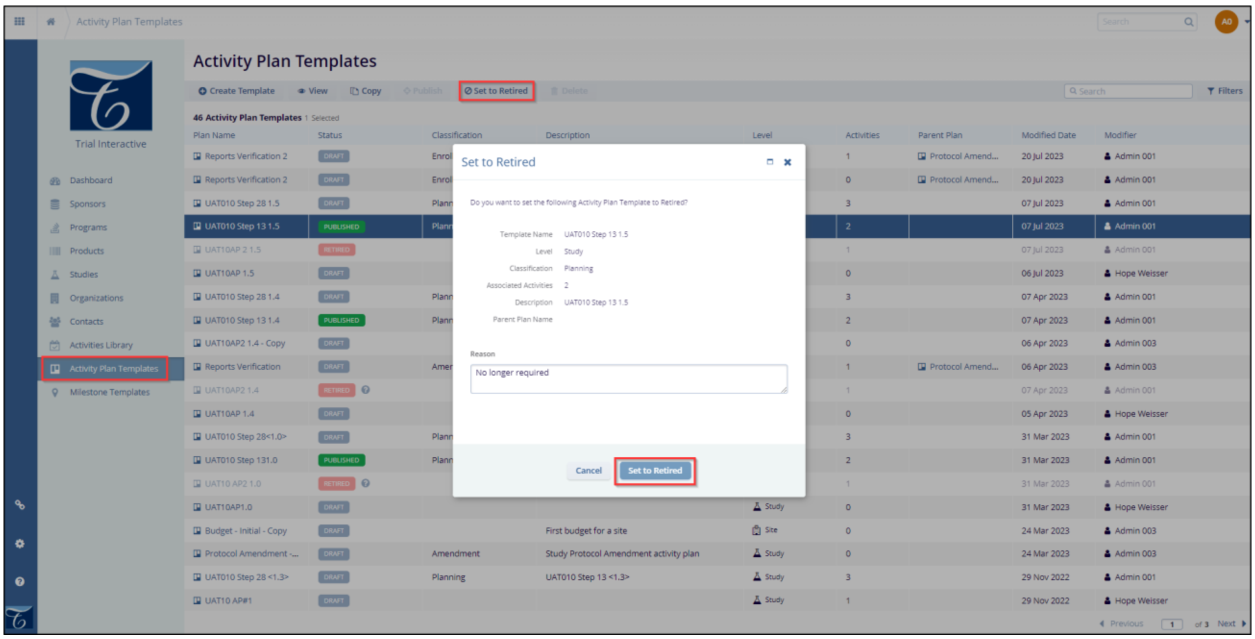
Retiring Activity Plans

1. Click on the **Activity Plan Templates** link in the Navigation menu in the panel at the left side of the screen.
    a. This opens the **Activity Plan Templates** window.
2. Navigate to the plan name which is in **Published** status you want to retire and click on it.
3. Click on the **Set to Retired** button in the top-left of the screen.
    a. Confirmation window for activity plan retirement is displayed.
4. Enter a reason for retiring the activity plan.
5. Click on the **Set to Retired** button in the window.



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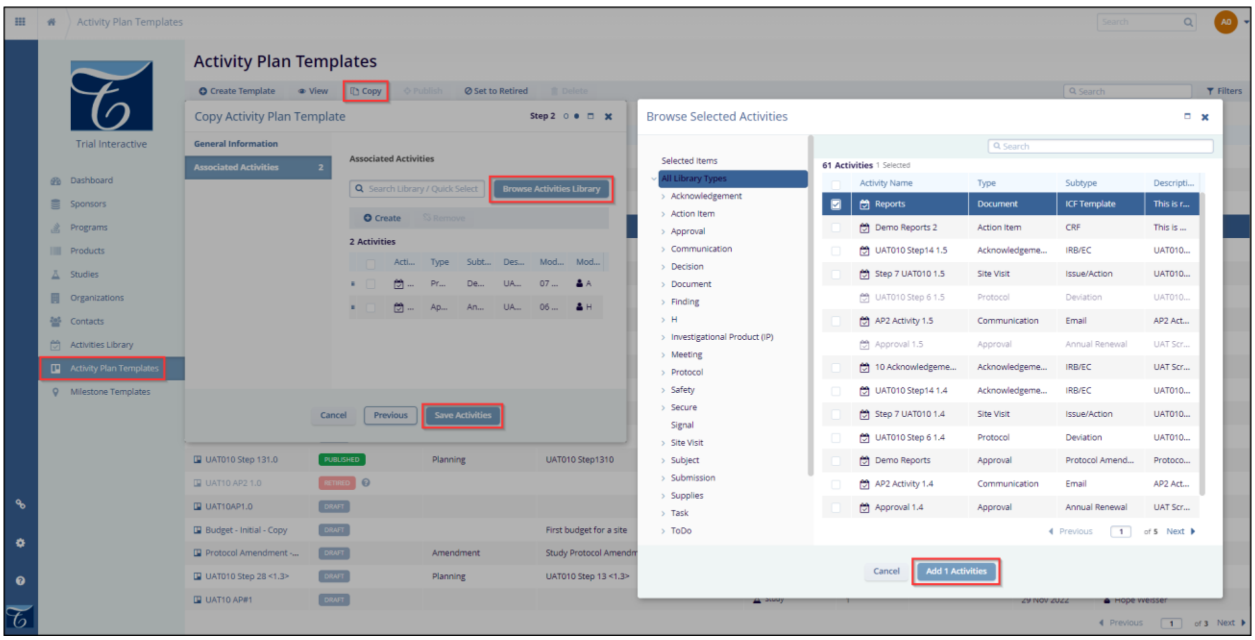
Copying Activity Plans

1. Click on the **Activity Plan Templates** link in the Navigation menu in the panel at the left side of the screen.
   a. This opens the "Activity Plan Templates" window.
2. Navigate to the plan you want to copy and click on it.
3. Click on the **Copy** button in the top-left of the screen.
   a. This opens the **Copy Activity Plan Template** window.
4. Update the necessary fields and click on **Next Add Activities**.
   a. This displays all the associated activities.
5. Click **Browse All Activities** in the **Copy Activity Plan Template** window.
6. Select an existing library activity for association to the activity plan.
7. Click **Save** Activities in the **Copy Activity Plan Template** window.

Note: Draft and Retired activities are not available for selection for any entity.



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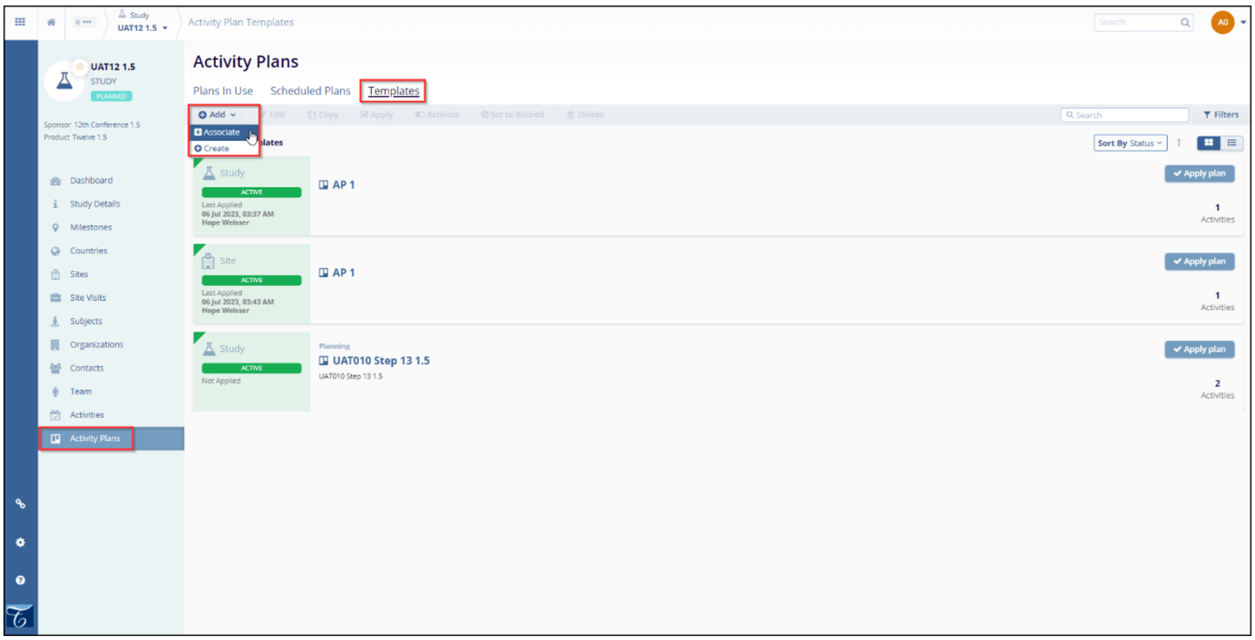
Associating Activity Plan Templates to a Study

1. Click on the **Studies** link in the Navigation menu in the panel at the left side of the screen.
    a. This open the “Studies” window and the studies list is displayed.
2. Navigate to the study you want to associate to an activity plan template and click on it.
    a. This opens the dashboard for the study.
3. Click on the **Activity Plans** link in Navigation menu at the left side of the screen.
    a. This opens the “Activity Plan” window’s **Plans in Use** section.
4. Click on **Templates** in the top-left of the screen.
    a. This opens the “Templates” window and templates list is displayed.
5. Click on the **Add** button in the top-left of the screen.
6. Now click on the **Associate** from the dropdown menu.



7. This opens the **Associate Activity Plan Templates to study** window.

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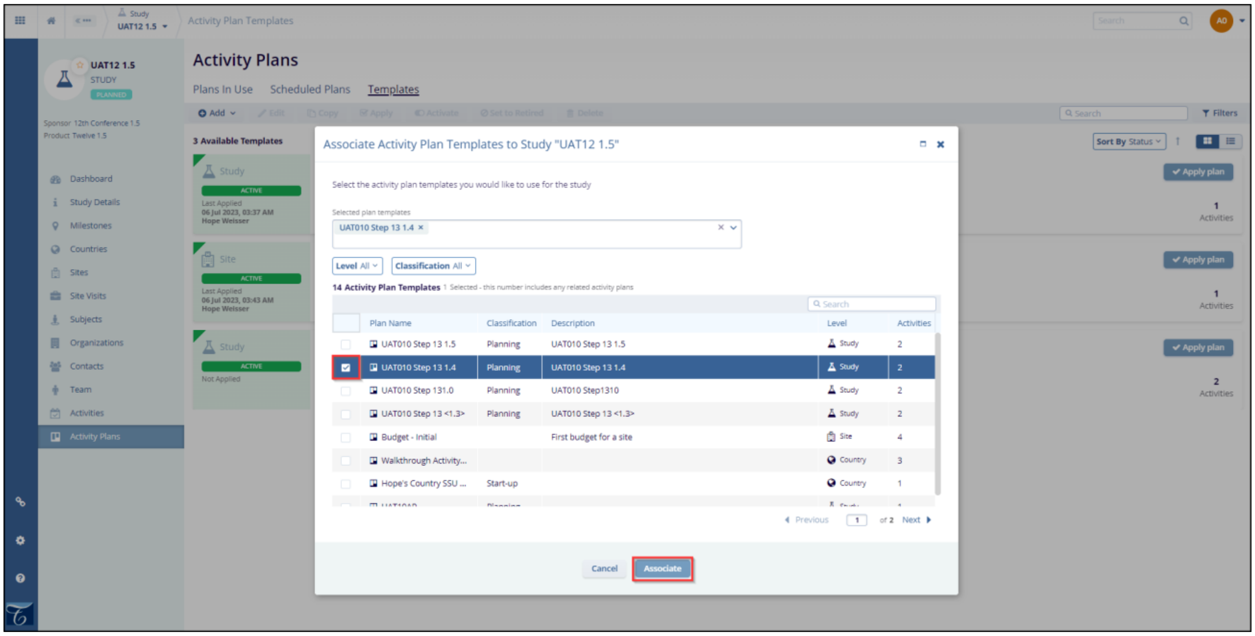
8. Click on the **check box** before the plan name you want to associate to a study.
9. Click on the **Associate** button in the bottom of the **Associate Activity Plan Template** window.

Note: Activity plans default to Draft status to allow for review and updates before making the plan available for selection by the user community throughout the system.



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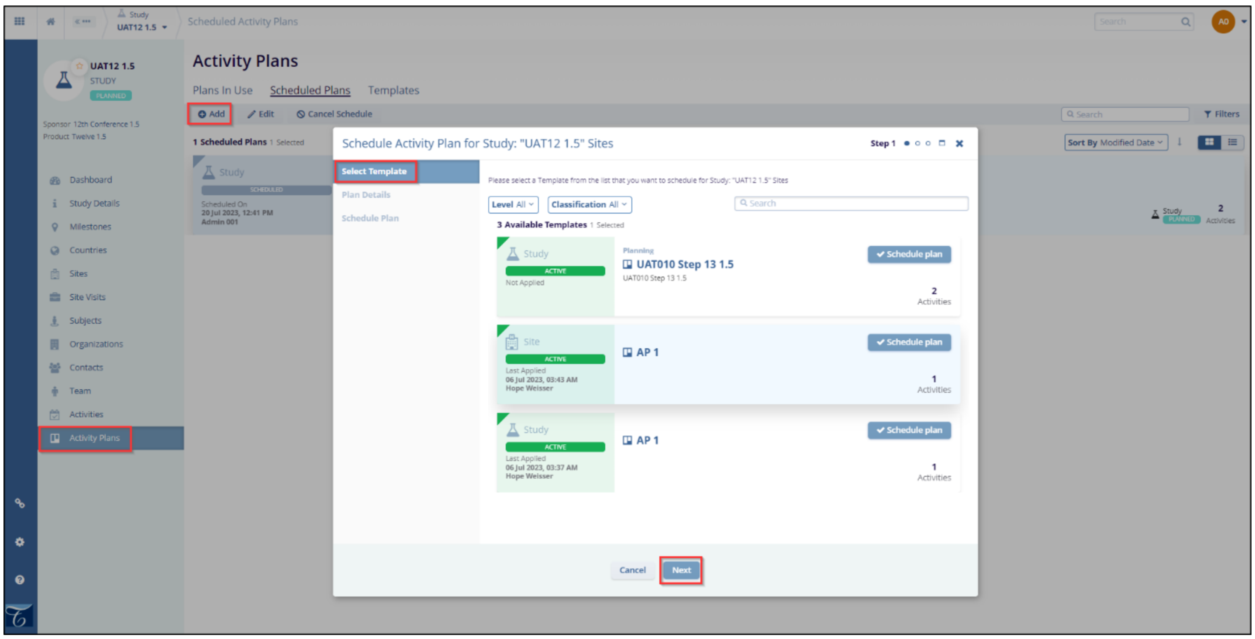
Scheduling Activity Plans

1. Click on the **Studies** link in the Navigation menu in the panel at the left side of the screen.
   a. This open the studies window and studies list is displayed.
2. Click on the name of the study to which you want to associate an activity plan template.
   a. This opens the **dashboard** for the study.
3. Click on the **Activity Plans** link in Navigation menu at the left side of the screen.
   a. This opens the **Activity Plan** window's **Plans in Use** section.
4. Click on the **scheduled Plans** button in the activity plans screen.
   a. This opens the Scheduled Plan window.
5. Click on the **Add** button in the top-left of the screen.
   a. This opens the "Scheduled Activity Plan for Study: "Study Name" Sites" window.
6. Navigate to the activity Plan you want to schedule, click on it.



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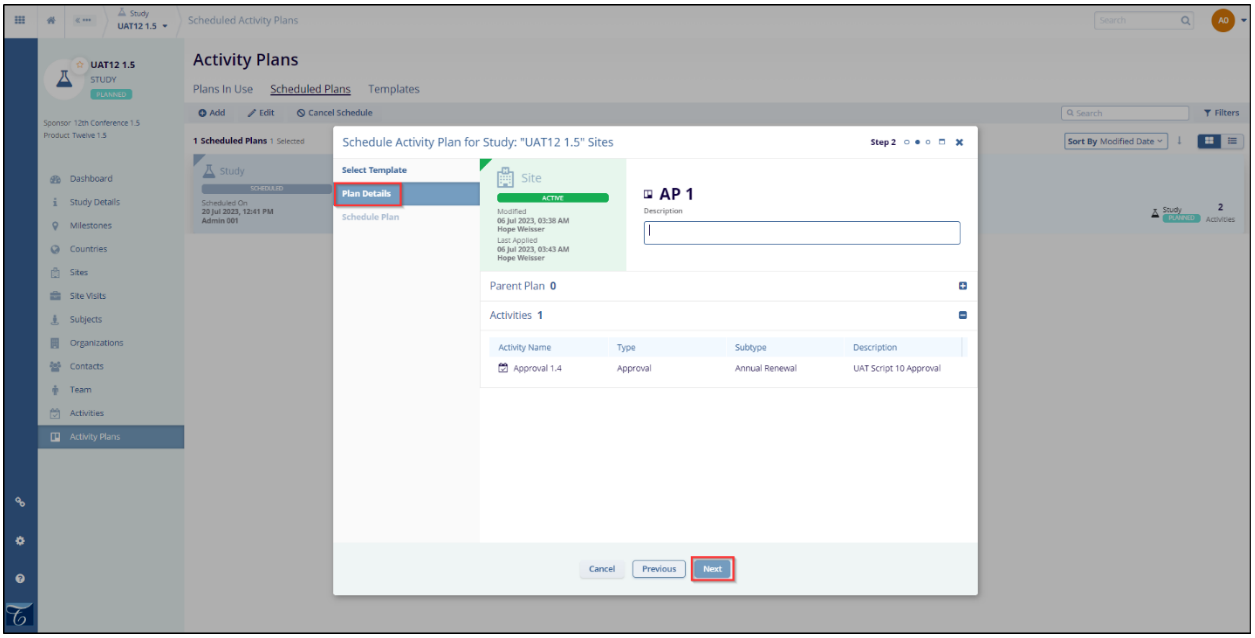
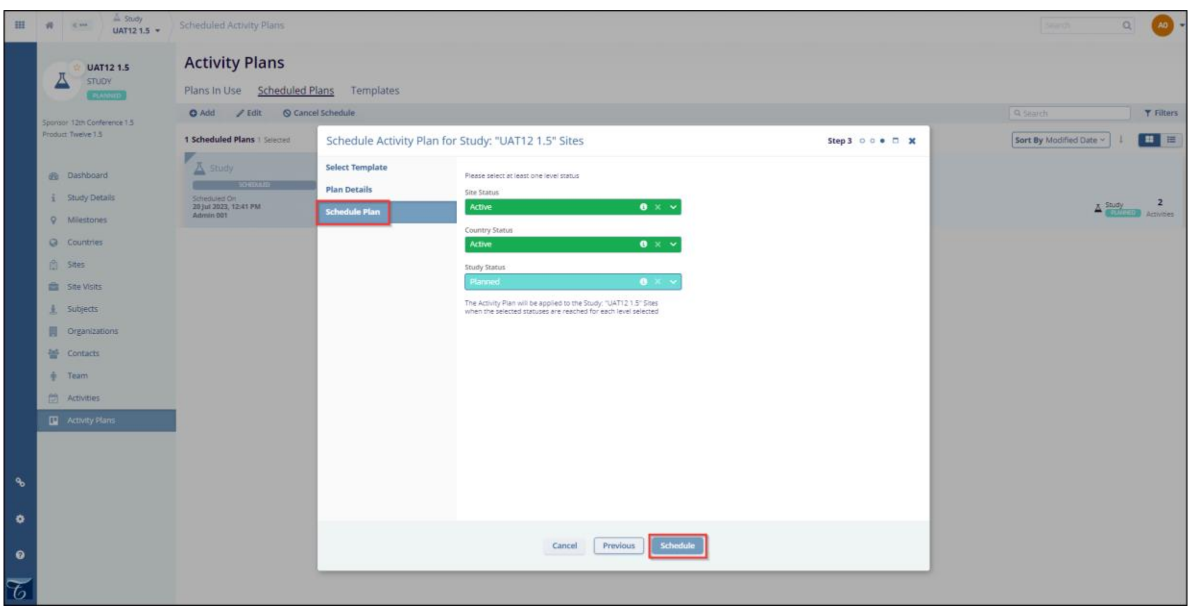
7. Now click on the **Next** button in the bottom on the window.
    a. This opens the "Schedule Plan" tab on the window.
    b. Verify the details mentioned and click the **Next** button.



8. Select at least one level of status by clicking on the dropdown.
    a. Select one value from the dropdown.
9. Click on **Schedule** button on the bottom of the window.



10. If you want to cancel the scheduled plans which was scheduled.

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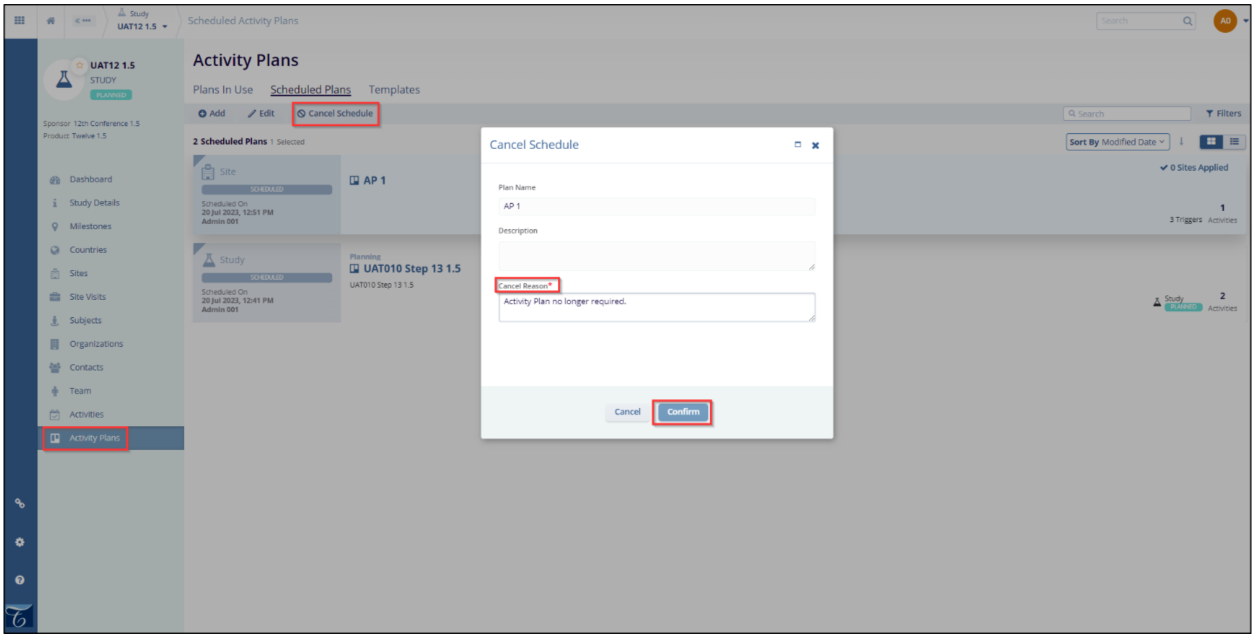
11. Navigate to scheduled plans window and click on the scheduled activity plan you want to cancel.
12. Click on the **Cancel Schedule** button in the top-left of the screen.
13. Enter a reason (*) for cancelling the schedule and click the **Confirm** button.



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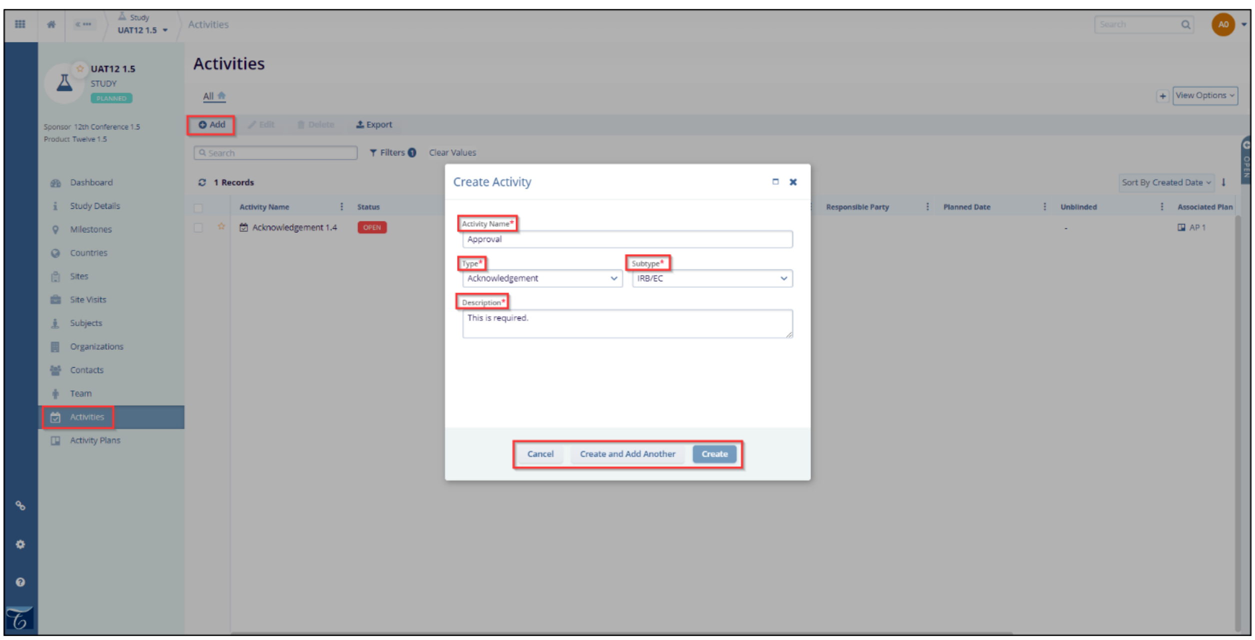
Tracking Activities Outside of Activity plans

1. Click on the **Studies** link in the Navigation menu in the panel at the left side of the screen.
   a. This open the "Studies" window and studies list is displayed.
2. Click on the name of the study for which you need to check the activities.
   a. This opens the dashboard for the study.
3. Click on the **Activities** link in the Navigation menu at the left side of the screen.
   a. This opens the "Activities" screen.
4. Click on the **Add** button in the top-left of the screen.
   a. This opens the **Create Activity** window.
5. Here we need to fill the mandatory metadata to create an activity i.e., **Activity Name, Type, Sub Type, Description** as indicated by an asterisk (*) symbol next to the field title.
6. Initially Sub Type is greyed out, once you select a value for the Type from the dropdown menu the related values for the sub type will appear in the dropdown menu.
7. If any of the required fields are missing, an error will appear when we click on the **Create** button, displaying the fields which need to be filled to create an activity successfully.
8. **(Optional)** Click **Create** or **Create and Add Another** depending on whether you intend to create another activity right away.



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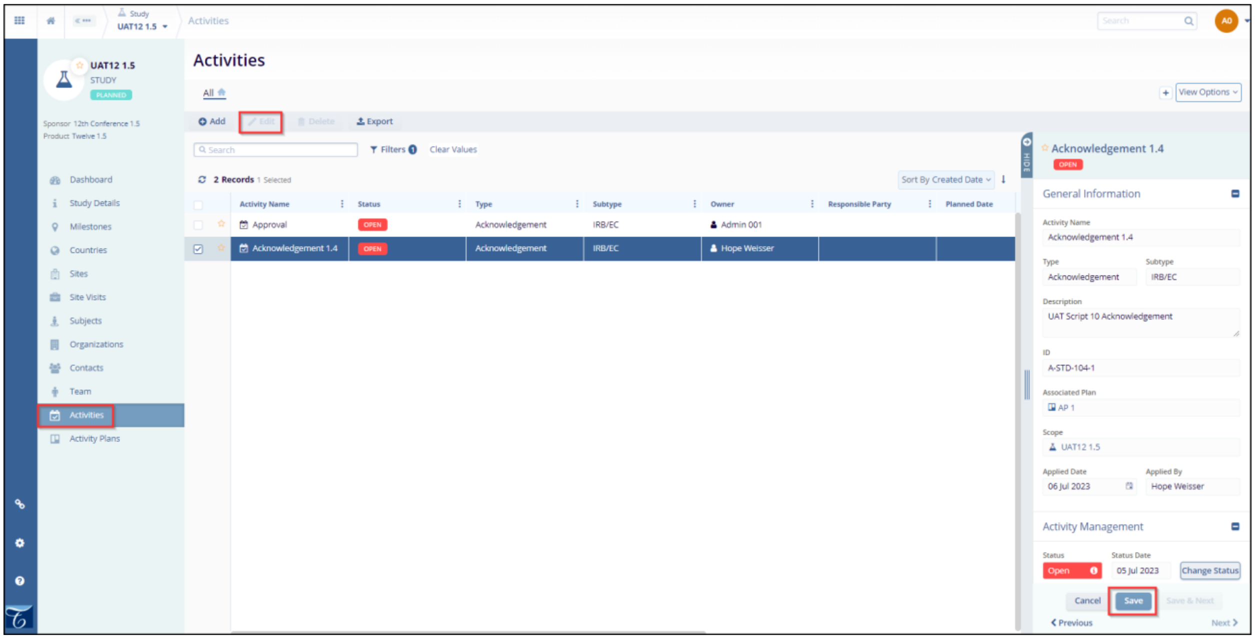
9. To edit any activity, select the activity name and click on the **Edit** button in the top-left of the screen.
10. This opens the quick-view window on the right side of the screen, make necessary changes in the activity.
11. Click on the **Save** button in the bottom right of the screen.



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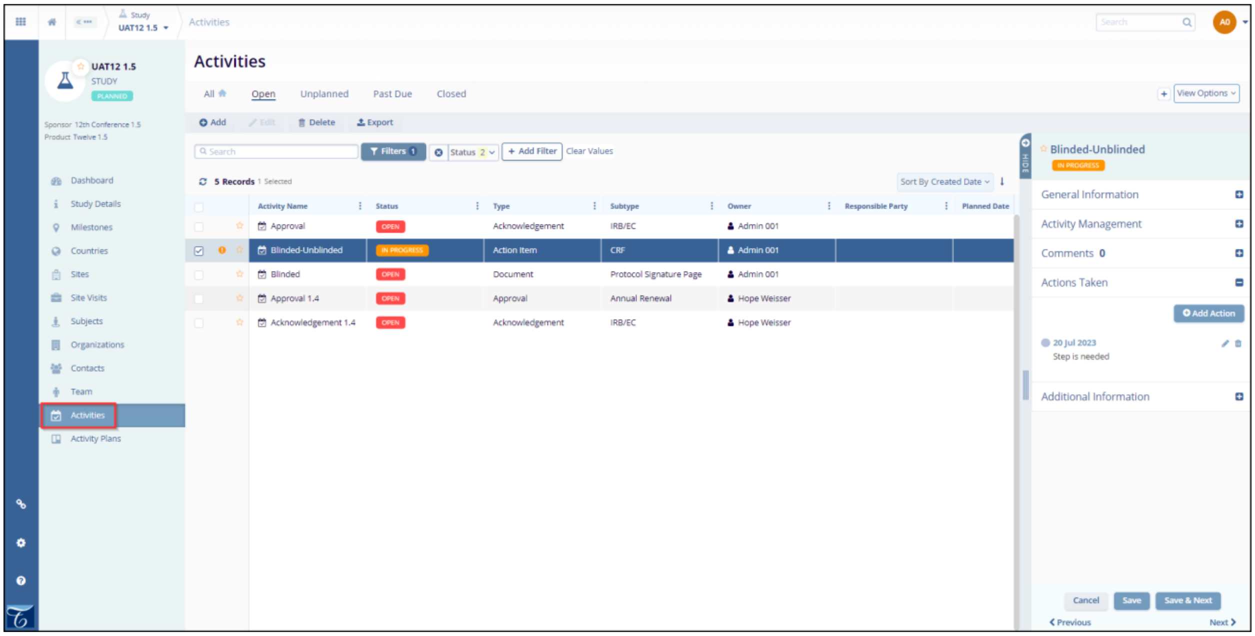
Tracking Actions Taken Toward Activity Completion

Some activities associated with studies or sites, especially records of deviations associated with site visits, may require correction or additional steps associated with their eventual completion. Users may enter these actions in the right-side menu. Refer to the screenshot below:



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Milestones

This section describes about Milestones module in the application.

The application of Milestones to studies in CTMS has undergone some minor changes in order to help our users better apply milestones quickly and efficiently to a study.

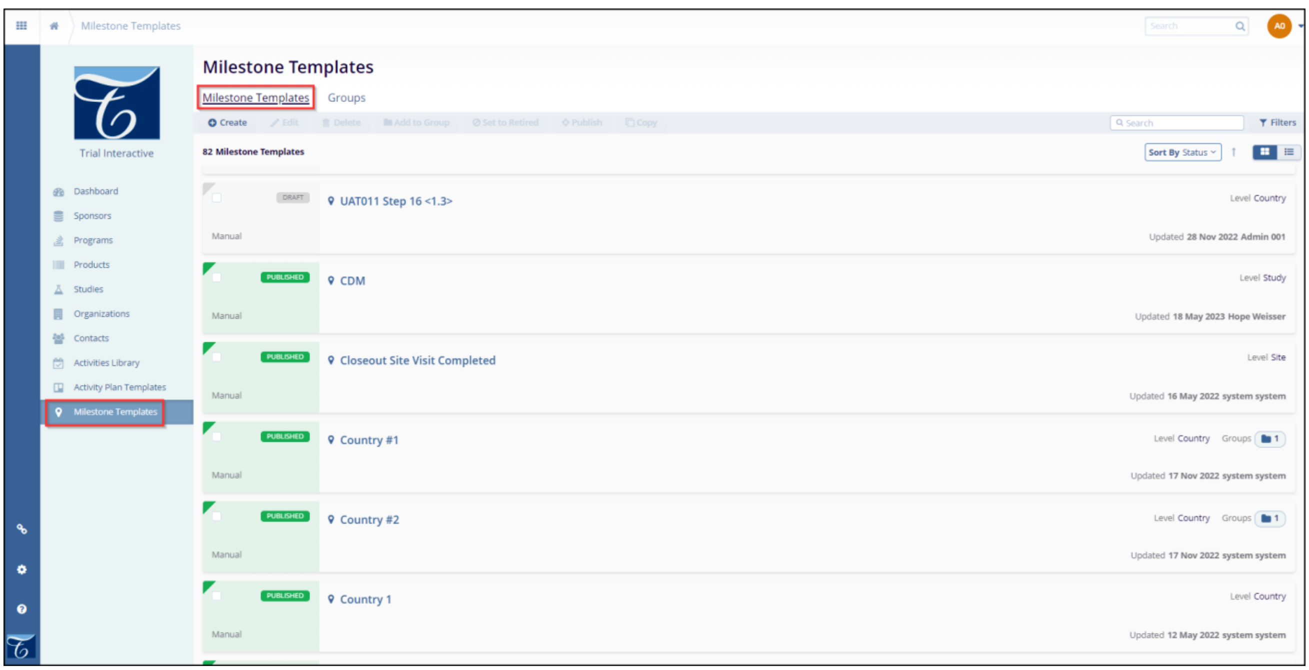
As a note, with CTMS Milestones that are retired at the Global level are retired in all levels of the data hierarchy. If you want to continue to track a milestone after retiring it at the Global level, it is imperative that you make a copy of the milestone at the Sponsor level or lower before retiring the milestone at the Global level.

Pre-Requisites

Any users who are responsible for creating and managing **Milestones** must have been granted appropriate access rights by the Company Administrator.

Milestone Groups

Creating milestones in the CTMS has not changed but now we're offering users the ability to create and apply groups of milestone templates as needed. Only published milestone templates may be added to a group. Milestone groups may be set up at the Global or Study level by users with sufficient access to either level of data.



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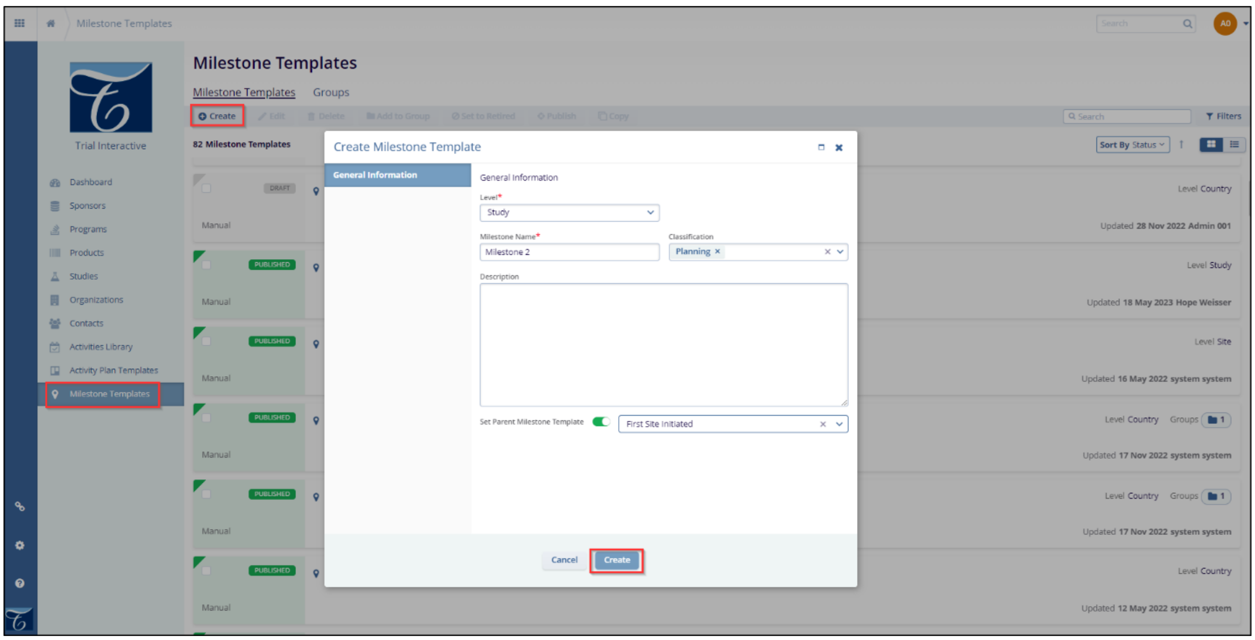
Creating Domain Library Milestone Template

1. Navigate to the Home Screen by clicking on the **home** icon in the top-left of the screen.
2. Click on the **Milestone Templates** link in the Navigation menu in the panel at the left side of the screen.
   a. This opens the “Milestone Templates” window.
3. Click the **Create** button in the top-left of the screen.
   a. This opens the “Create Milestone Template” window.
4. Here we need to enter the mandatory metadata to create a milestone template i.e., **Level, Template Name** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information as necessary.
5. If any of the required fields are missing, an error will appear when we click on the **Create** button displaying the fields which need to be filled to create a milestone template successfully.



6. The **Create Milestone Template** window will close, and milestone template will be displayed.

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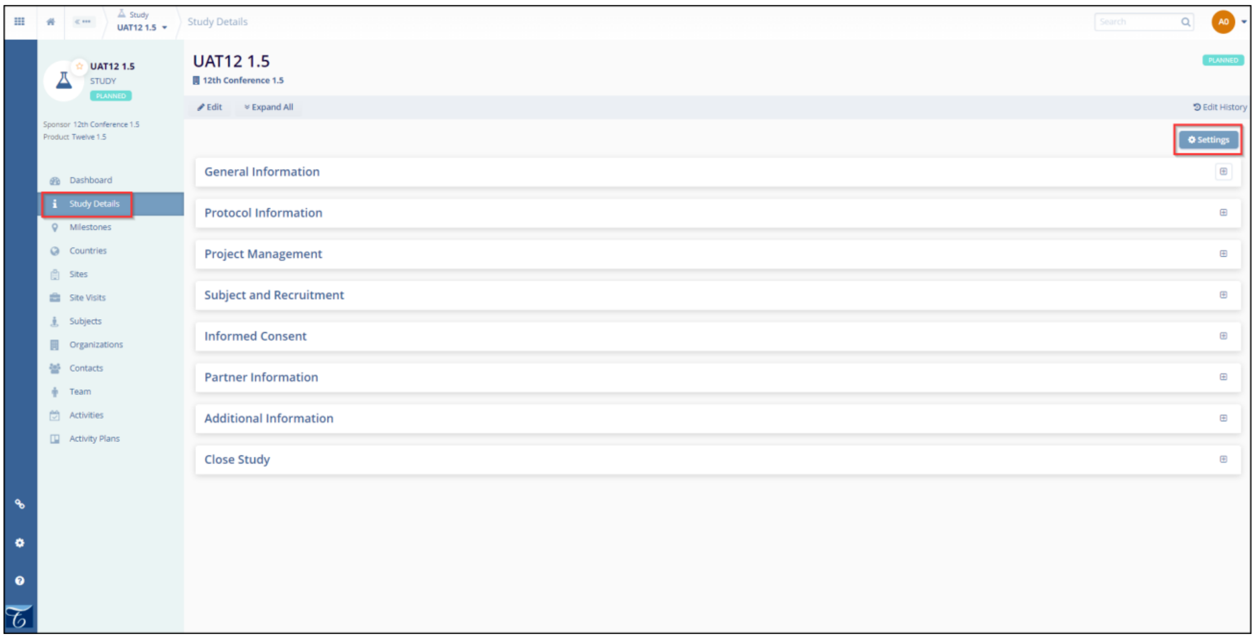
Creating a Study Milestone from a Template

1. Click on the **Studies** link in the Navigation menu in the panel at the left side of the screen.
    a. This opens the “Studies” window, and study list is displayed.
2. Click on the name of the study for which you want to create a milestone.
    a. This opens the study.
3. Click on the **Study Details** link in the Navigation menu at the left side of the screen.
    a. This opens the “Study Details” window.
4. Click on the **Settings** button in the top-right of the screen.



5. Click on the **Milestone Templates** link in the Navigation menu at the left side of the screen.
    a. This opens the “Milestone Template” window.
6. Click on the **Add** button in the top-left of the screen.

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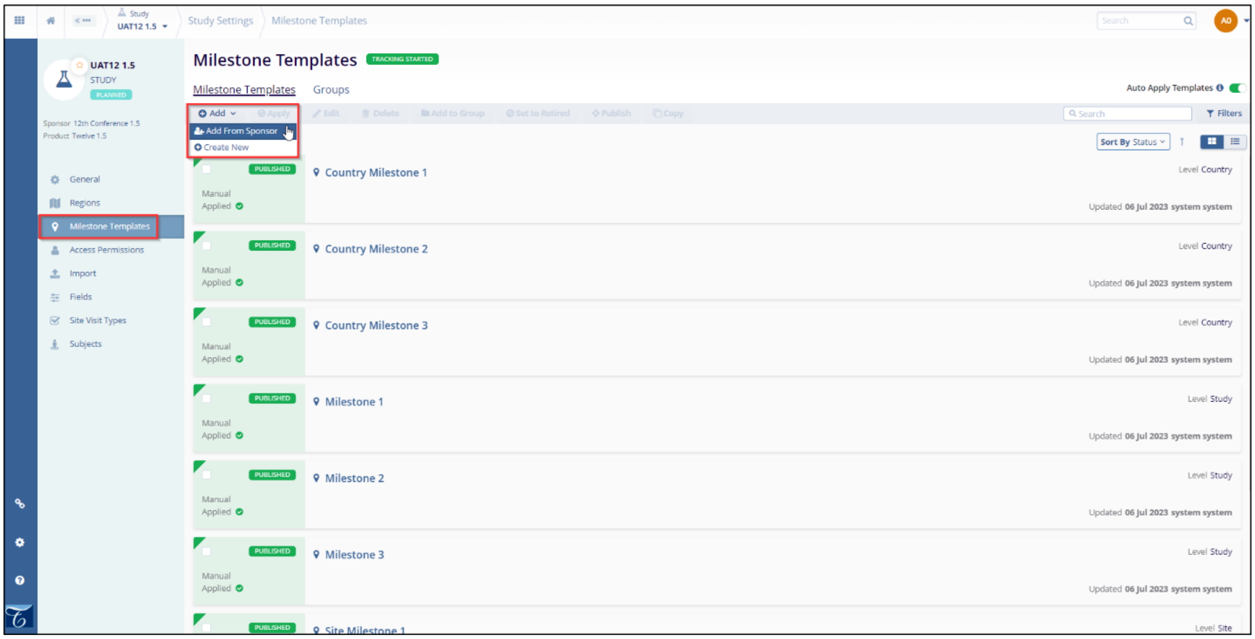
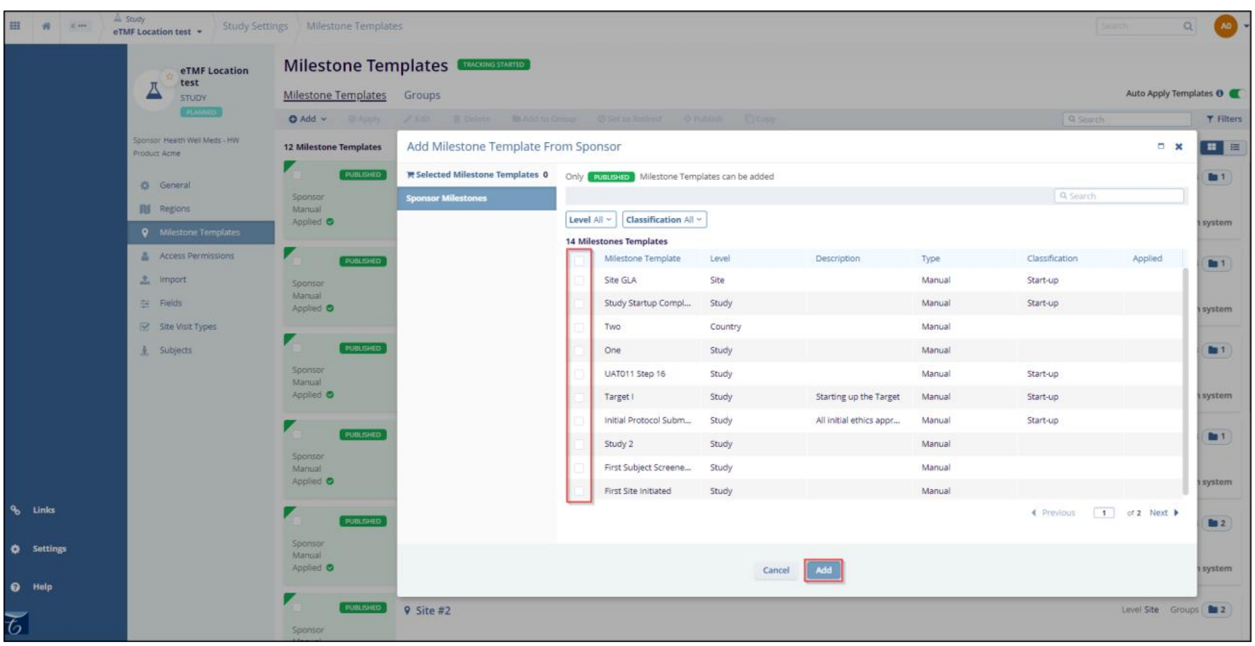
7. Click on **Add from Sponsor** in the drop-down menu.
   a. This opens the "Add Milestone Template from Sponsor" window. A list of all the available milestone templates is displayed, select one if you have the milestone template you are looking for.



8. Click on the **Add** button in the **Add Milestone Template from Sponsor** window.



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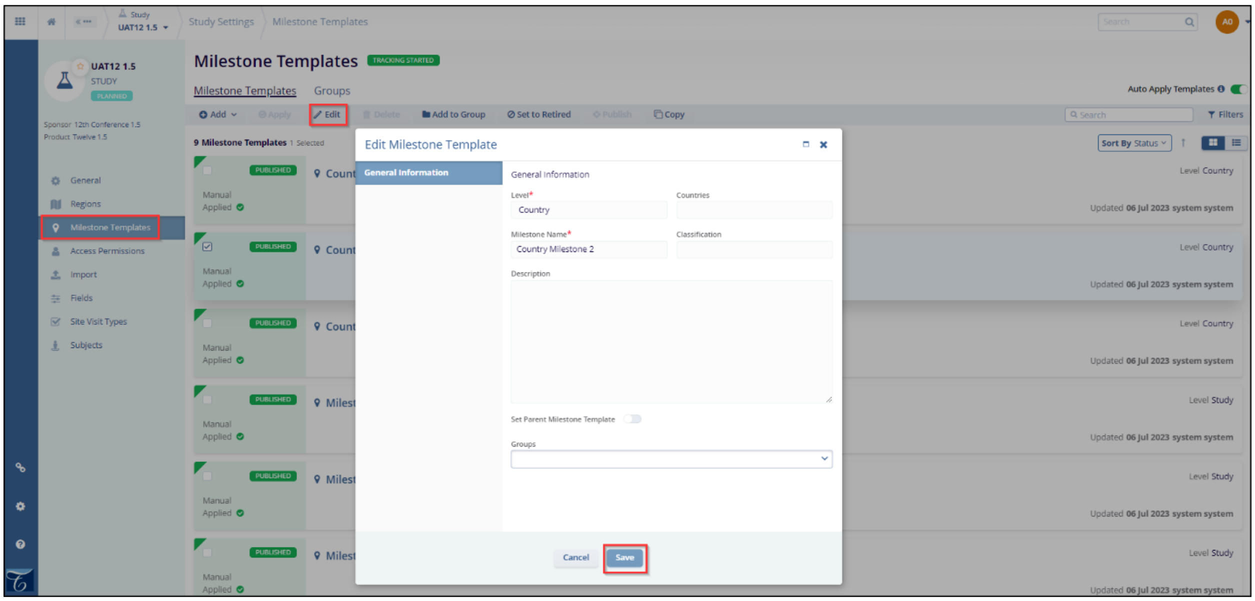
Editing Domain Milestone Templates

1. Navigate to the Home Screen by clicking on the **home** icon in the top-left of the screen.
2. Click on the **Milestone Templates** link in the Navigation menu at the left side of the screen.
    a. This opens the "Milestone Templates" window.
3. Click on the milestone template you want to edit.
4. Click on the **Edit** button in the top-left of the screen.
    a. This opens the "Edit Milestone Template" window.
5. Make any necessary changes.
6. Click the **Save** button.
7. The Milestone Template is **Updated** and displayed in the list

Note: You can edit only milestone templates with **Draft** status.



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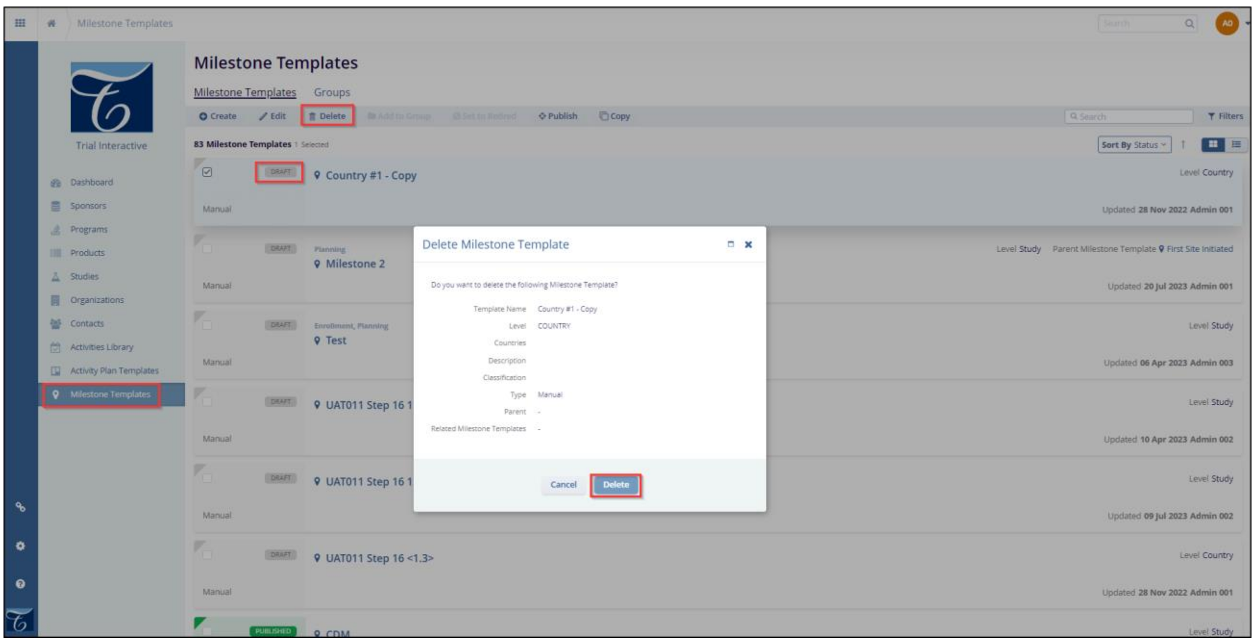
Deleting Domain Milestone Templates

1. Navigate to the Home Screen by clicking on the **home** icon in the top-left of the screen.
2. Click on the **Milestone Templates** link in the Navigation menu in the panel at the left side of the screen.
   a. This opens the “Milestone Templates” window.
3. Click on the milestone template which needs to be deleted.
   Note: The template needs to be in ‘**Draft**’ status to be deleted.
4. Click on the **Delete** button in the top-left of the screen.
   a. This opens the “Confirmation” window.
5. Click on the **Delete** button in the confirmation page.
6. The Milestone Template will be **Deleted** from the list.



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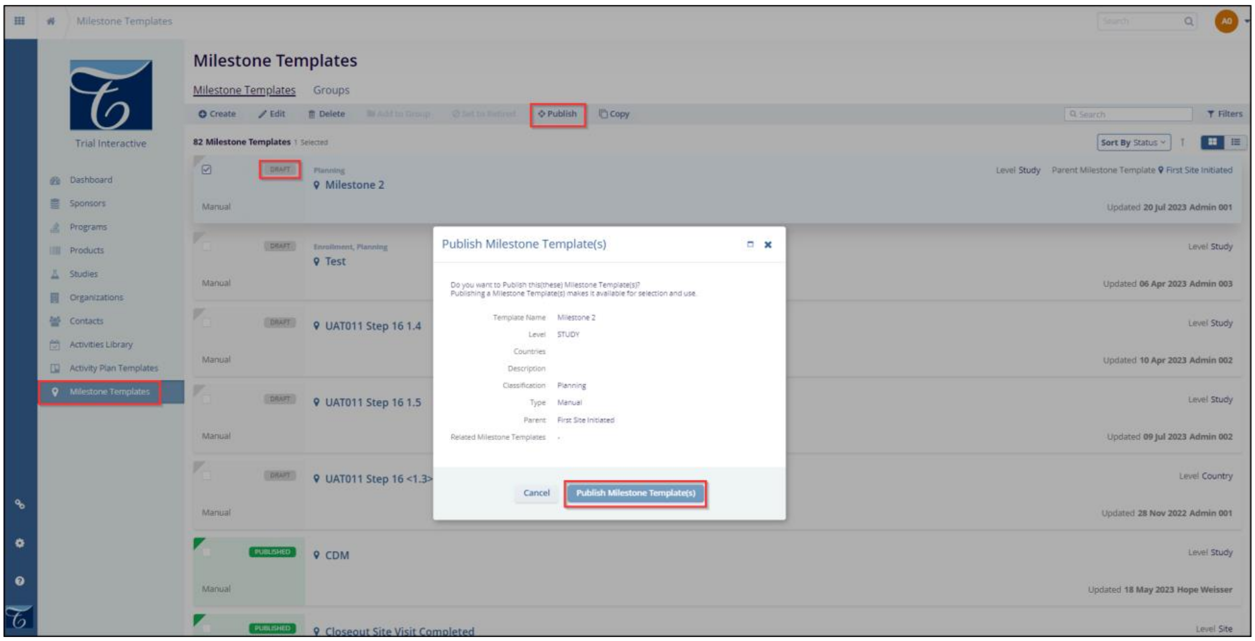
Publishing Milestone Templates

1. Navigate to the Home Screen by clicking on the **home** icon in the top-left of the screen.
2. Click on the **Milestone Templates** link in the Navigation menu in the panel at the left side of the screen.
   a. This opens the "Milestone Templates" window.
3. Select the **Draft** template you want to publish.
4. Click on the **Publish** button in the top-left of the screen.
   a. This opens the "Please Review Milestone Template" window.
5. Click on the **Publish Milestone Template** button in the **Please Review Milestone Template** window.
6. Milestone Template is **Published** and displayed in published status on the list.

Note: Milestone Templates are not available for selection by the user community until **Published**.



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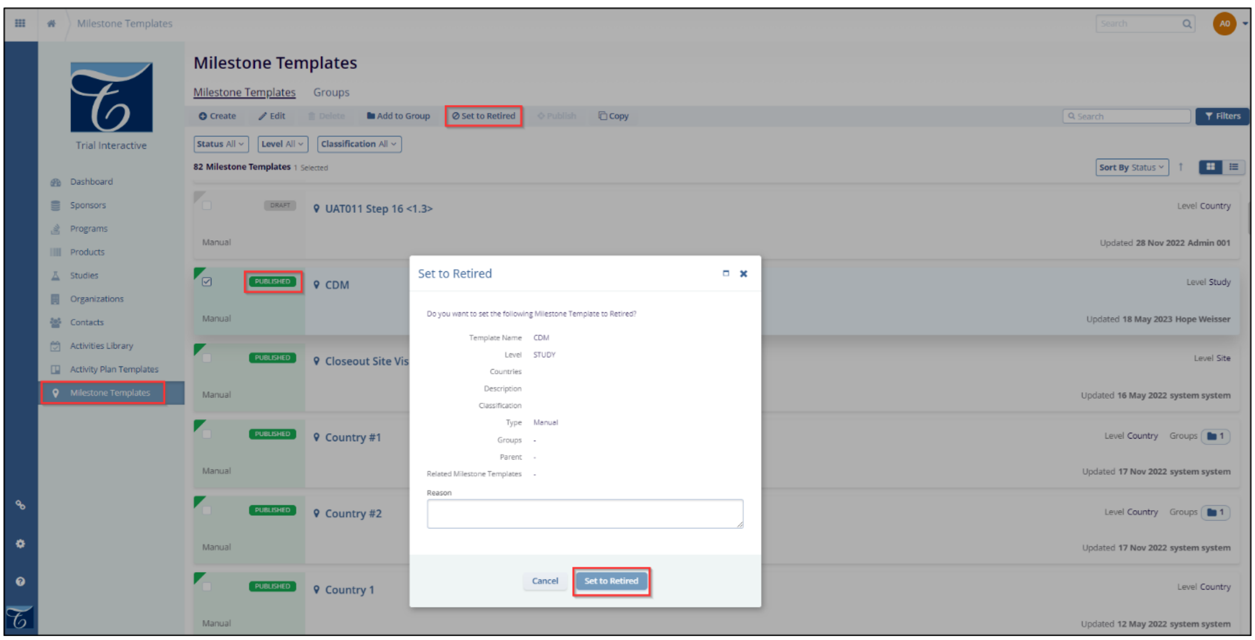
Retiring Milestone Templates

Milestones that are retired at the Global level are retired in all levels of the data hierarchy. If you want to continue to track a milestone after retiring it at the Global level, it is imperative that you make a copy of the milestone at the Sponsor level or lower before retiring the milestone at the Global level.

1. Navigate to the Home Screen by clicking on the **home** icon in the top-left of the screen.
2. Click on the **Milestone Templates** link in the Navigation menu in the panel at the left side of the screen.
   a. This opens the “Milestone Templates” window.
3. Navigate to the milestone template you want to retire and click on it.
   Note: Only **Published** templates can be **Retired**.
4. Click on the **Set to Retired** button in the top-left of the screen.
   a. This opens the “Set to Retired” window.
5. Click on the **Set to Retired** button in the “Set to Retired**”** window.
6. Milestone Template is **Retired** and displayed in the list.



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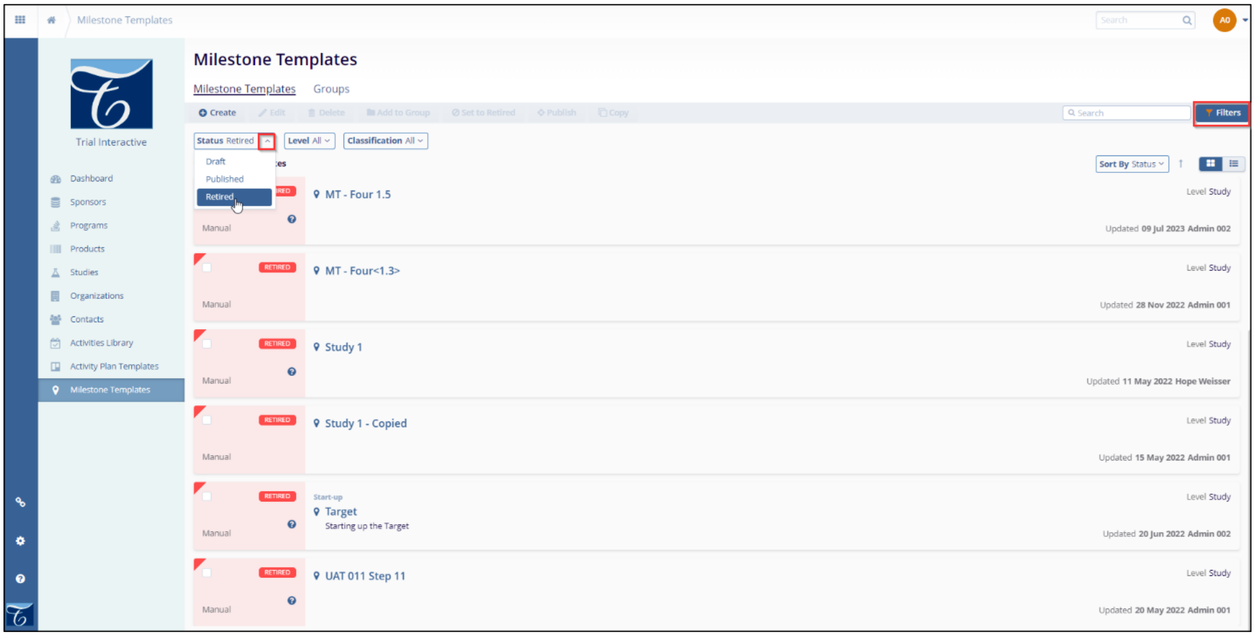
Note: Click the Status filter and select the retires option to view the retired milestone template. Refer to the screenshot below.



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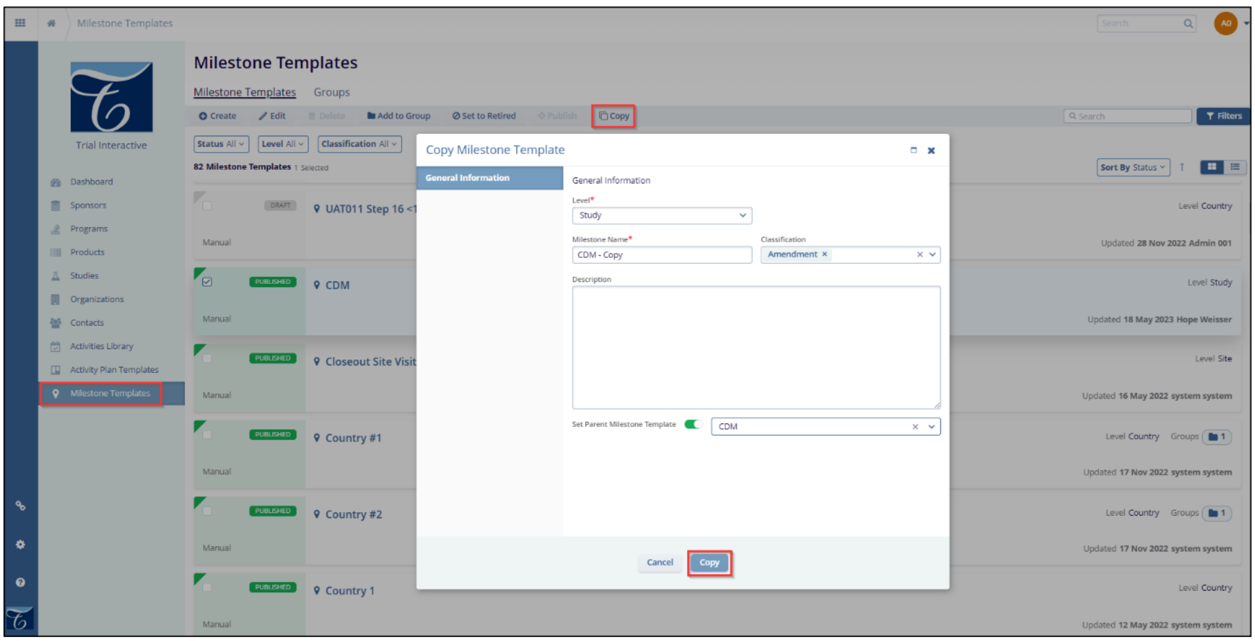
Copying Milestone Templates

1. Navigate to the Home Screen by clicking on the **home** icon in the top-left of the screen.
2. Click on the **Milestone Templates** link in the Navigation menu in the panel at the left side of the screen.
   a. This opens the “Milestone Templates” window.
3. Navigate to the milestone template you want to copy and click on it.
4. Click on the **Copy** button in the top-left of the screen.
   a. This opens the “Copy Milestone Template” window.
5. Click on the **Copy** button in the **Copy Milestone Template** window.
6. Milestone Template is **Copied,** and the copy is displayed in the list.

Note: The milestone templates displaying both Draft and Published status can be copied, only one at a time.



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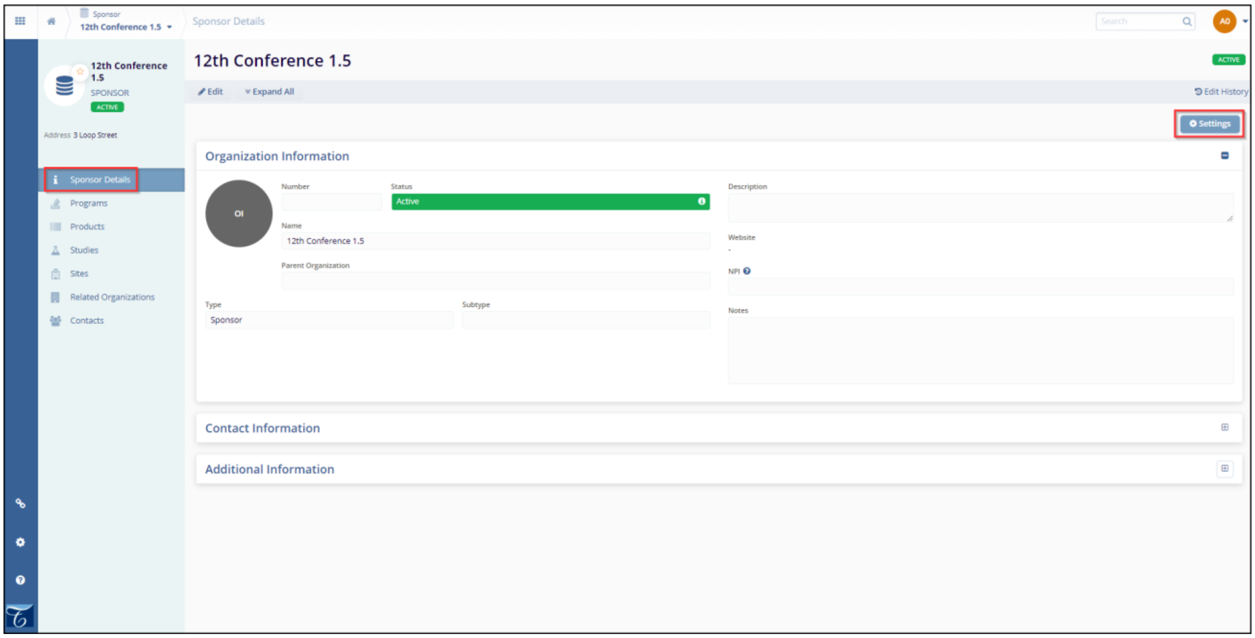
Associating Milestone Templates to a Sponsor

1. Navigate to the Home Screen by clicking on the **home** icon in the top-left of the screen.
2. Click on the **Sponsors** link in the Navigation menu at the left side of the screen.
    a. This opens the “Sponsors” window and list of sponsors is displayed.
3. Click on the sponsor to which you wish to associate a template.
    a. This opens the “Sponsor Details” window.
4. Click on the **Settings** button in the top-right of the screen.
    a. This opens the “Sponsors Setting Milestone Template” screen.



5. Click on the **Add** button on the top-left of the screen.
6. Click on **Add from Domain** in the dropdown menu.

7. This opens the **Add Milestone Template from Domain** window.
8. Select one of the milestone templates from the list and click on the **Add** button.
9. The Milestone Template is added to the list.

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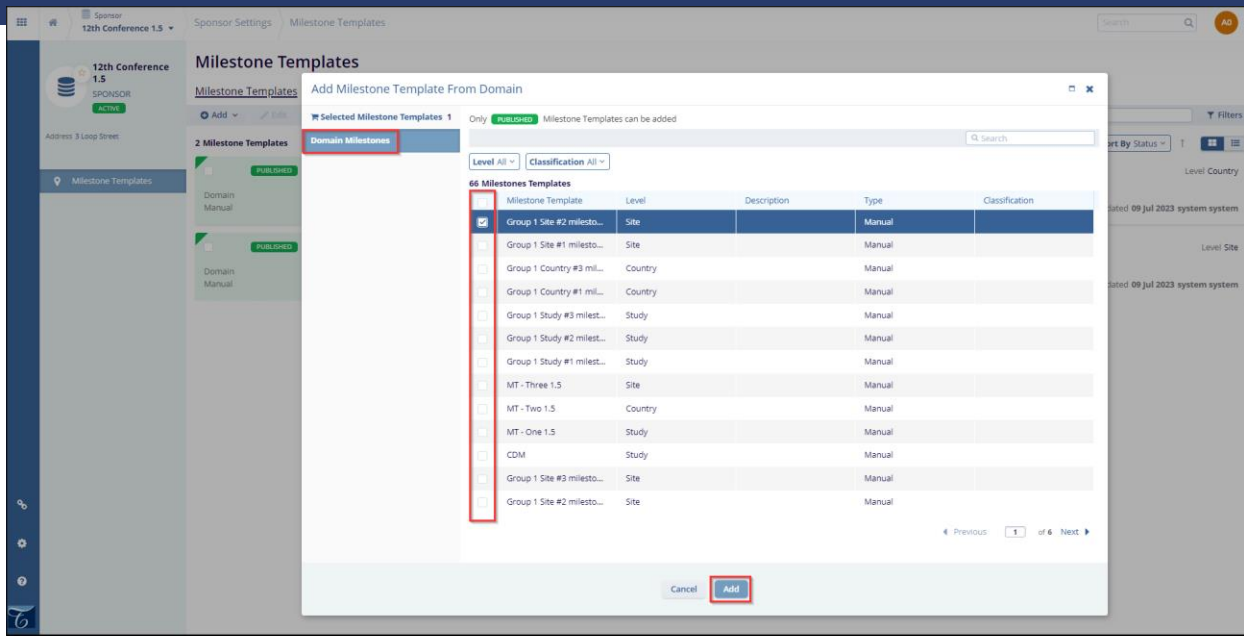

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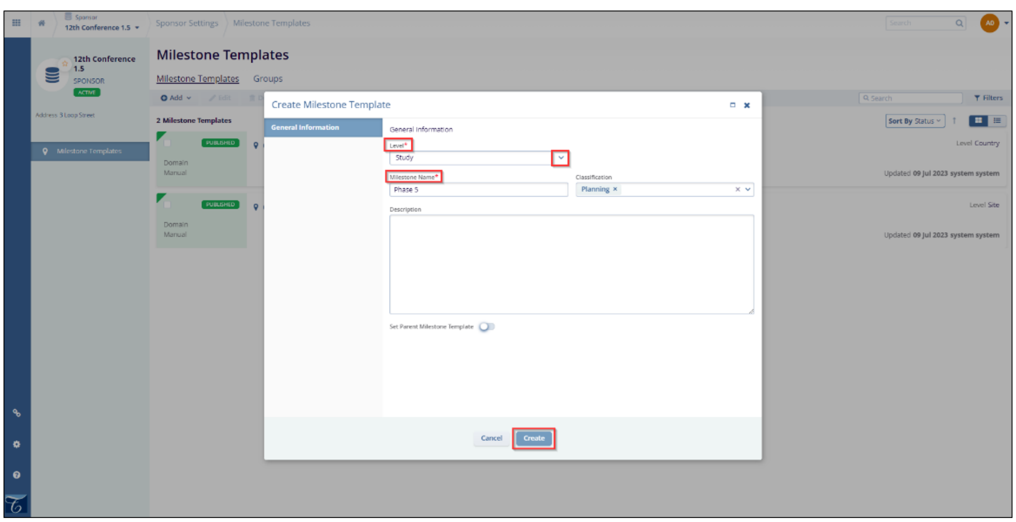
Defining Sponsor-Specific Milestone Templates

1. Navigate to the Home Screen by clicking on the **home** icon in the top-left of the screen.
2. Click on the **Sponsors** link in the Navigation menu in the panel at the left side of the screen.
   a. This opens the "Sponsors" window, and the sponsors list is displayed.
3. Click on the sponsor that you want to associate with a milestone template.
   a. This opens the "Sponsor Details" window.
4. Click on the **Settings** button in the top-right of the screen.
   a. This opens the "Sponsors Setting Milestone Template" screen.
5. Click on the **Add** button on the top-left of the screen.
6. Click on the **Create New** button from the dropdown.

7. This opens the **Create Milestone Template** window.
8. Here we need to fill the mandatory metadata to create milestone template i.e., **Level, Template Name** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information as necessary.
9. If any of the required fields are missing, an error will appear when we click on the **Create** button displaying the fields which need to be filled to create a milestone template successfully.
10. Click on the **Create** button in the **Create Milestone Template** window.



Defining Study Milestone Templates (New)

1. Click on the **Studies** link in the Navigation menu in the panel at the left side of the screen.

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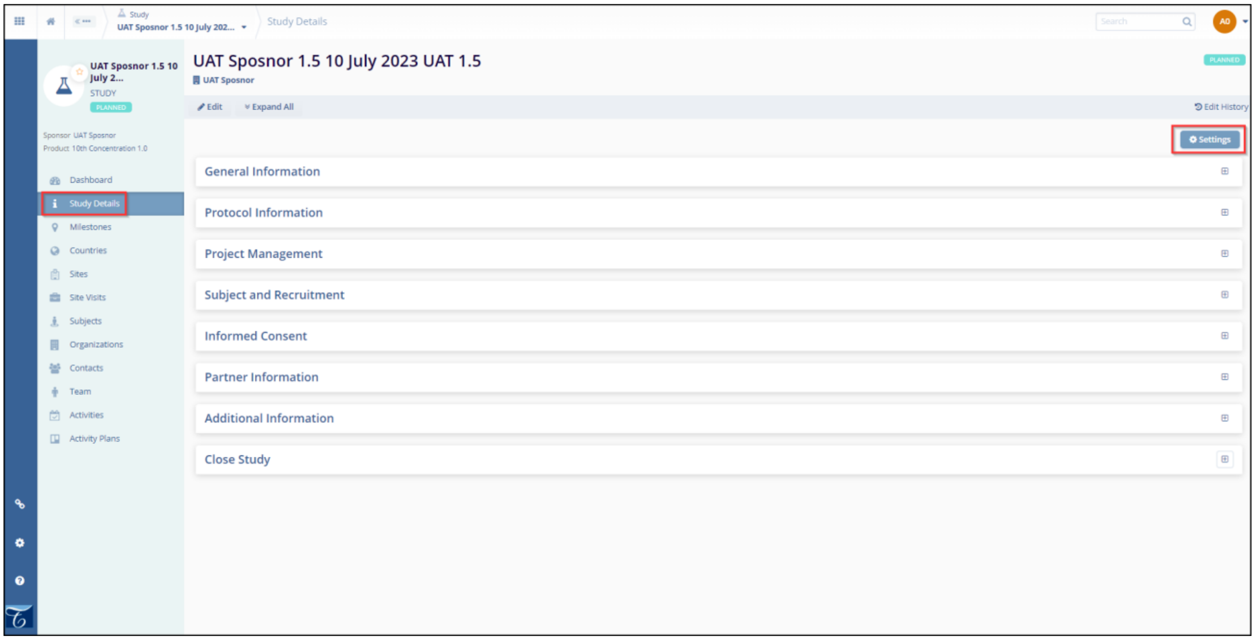
   a. This opens the “Studies” screen.
2. Click on the name of the study for which you want to define a new template.
   a. This opens the study dashboard.
3. Click on the **Study Details** link in the Navigation menu at the left side of the screen.
   a. This opens the “Study Details” window.
4. Click on the **Settings** button in the top-right of the screen.
   a. This opens the “Study Settings General” window.



5. Click on the **Milestone Template** link in the Navigation menu at the left side of the screen.
   a. This opens the “Milestone Template” window.
6. Click on the **Add** button in the top-left of the screen.

7. Click on **Add from Sponsor** from the dropdown.

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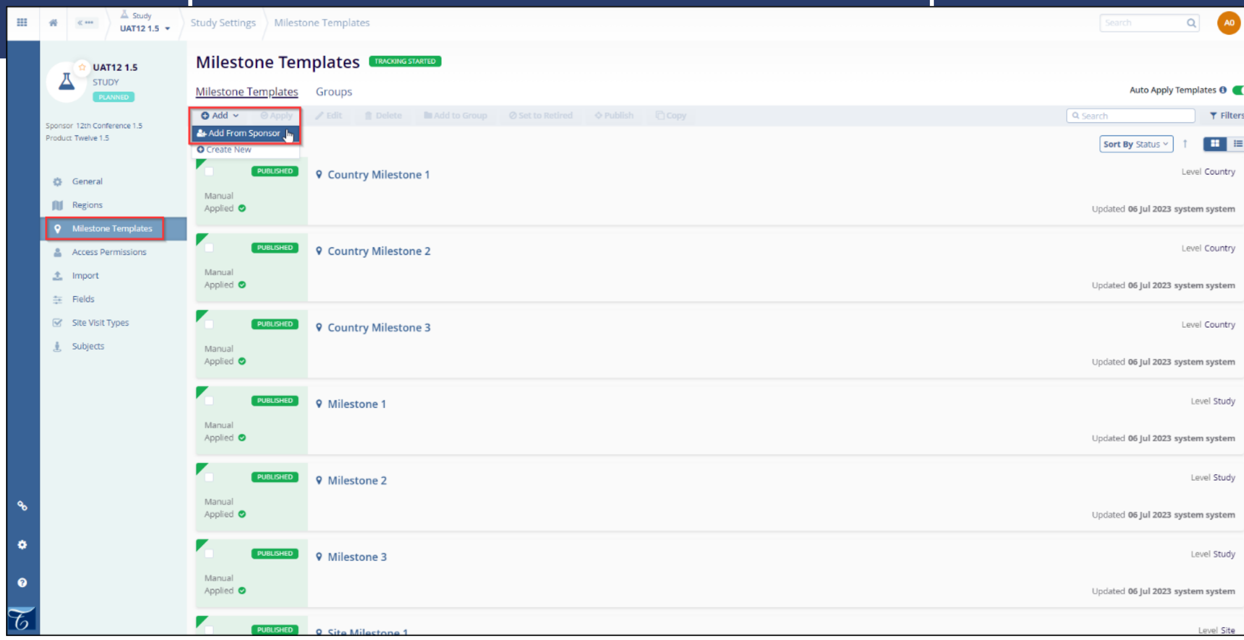

Note: Clicking Add from Sponsor will allow for the selection of a milestone template that is already associated to your study sponsor.

8. Select an available Milestone Template from the list.
9. Click on the **Add** button in the bottom of the **Add Milestone Template from Sponsor** window.

10. The selected sponsor **Milestone Templates** are displayed in the list.

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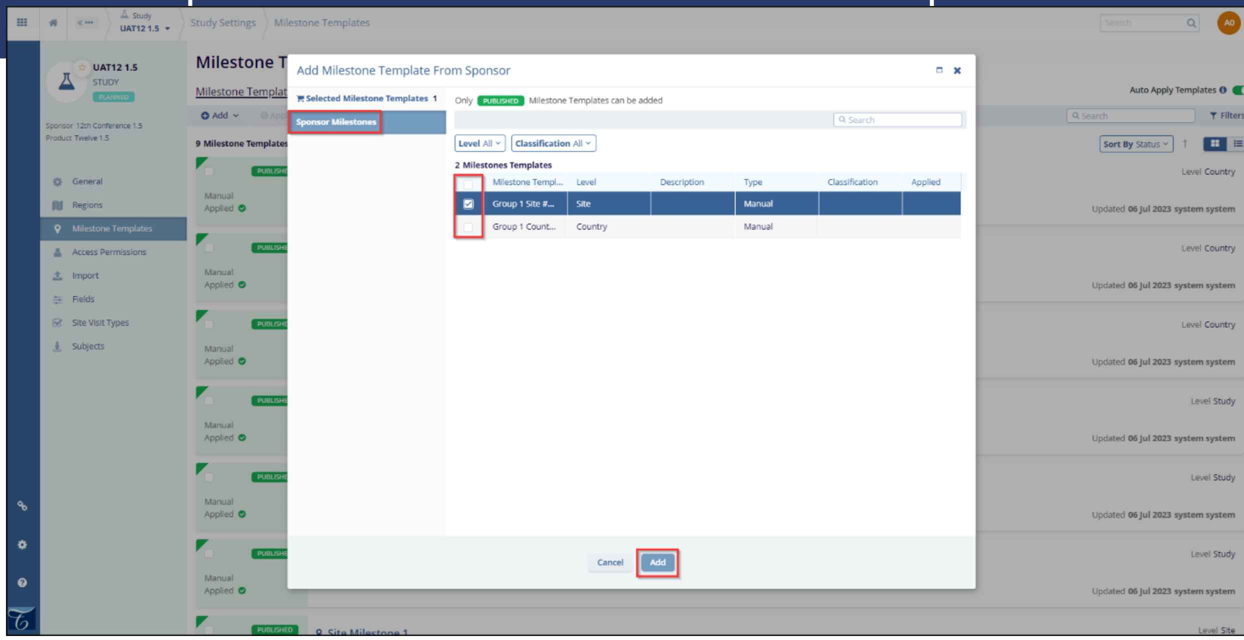
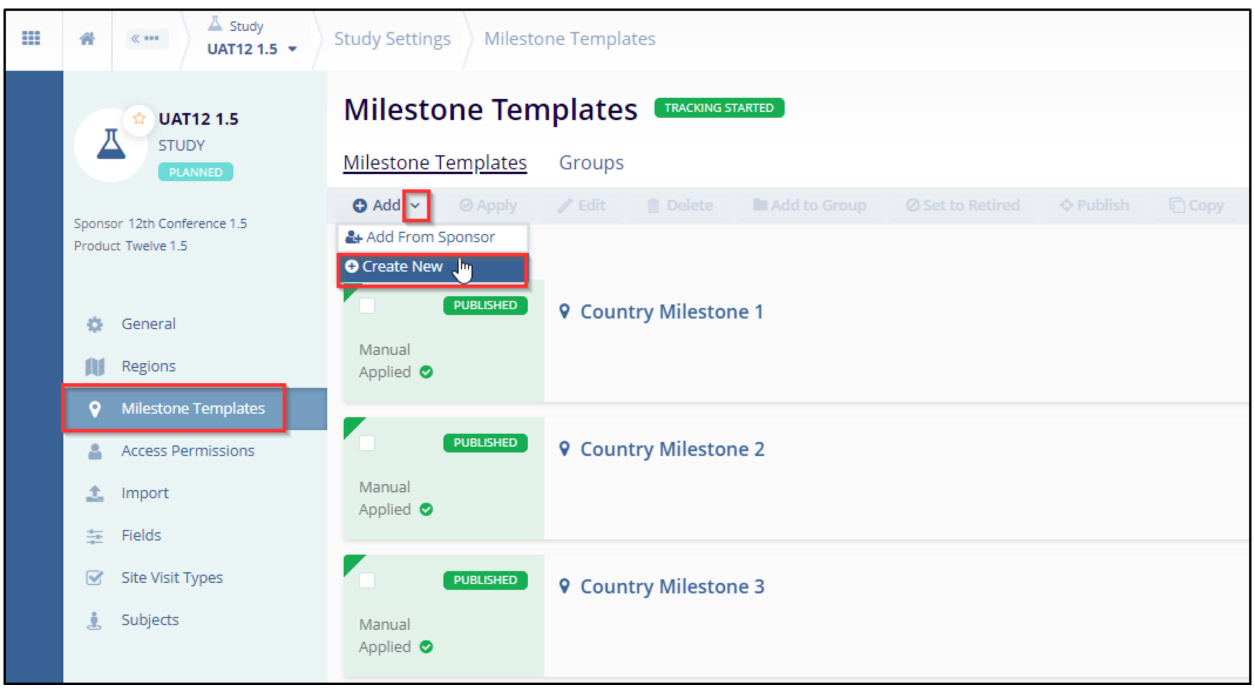


To create a new **Milestone Template**, follow these steps.

11. Click on the **Add** button in the top-left of the screen.
12. Click on the **Create New** button form the dropdown list.



Note: Clicking Create New allows for the creation of a new study specific milestone template.

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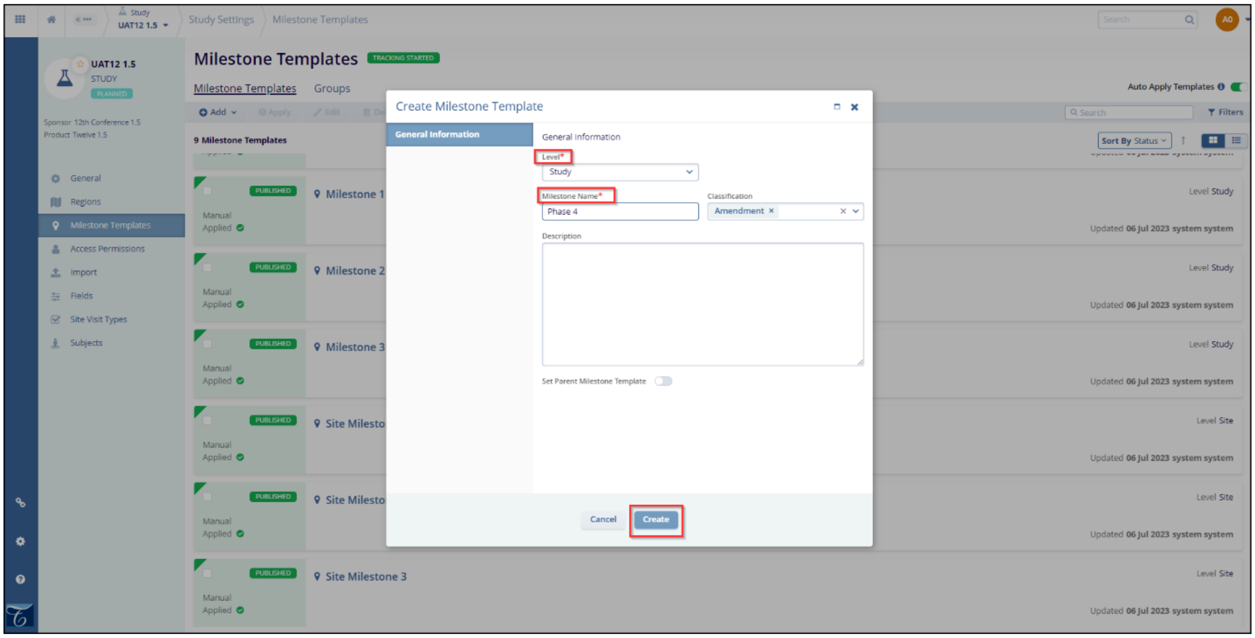
13. Here we need to fill the mandatory metadata to create a milestone template i.e., **Level, Template Name** as indicated by an asterisk (*) symbol next to the field title. Enter any additional information as necessary.
14. If any of the required fields are missing, an error will appear when we click on the **Create** button displaying the fields which need to be filled to create a milestone template successfully.



Tracking Milestones

1. Navigate to the Milestones you want to track.
2. Click on **Start Tracking** in the top-left of the screen.
   a. This opens the “Start Tracking” window.
3. Click on the **Yes, start tracking** button in the **Start Tracking** window.

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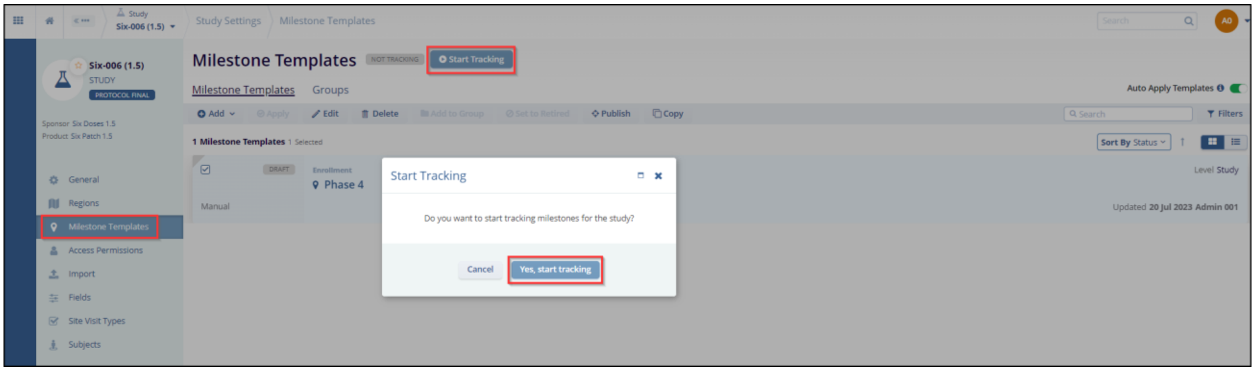
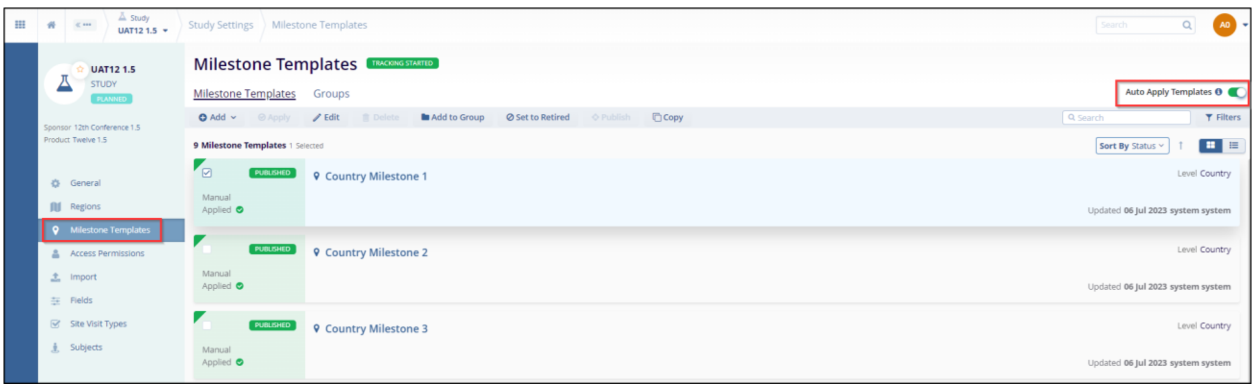
Note: The milestone will not be displayed for tracking at any level until Start Tracking is clicked for the desired milestone.



Auto Apply

It can be difficult, at times, to remember to apply a newly added or created milestone to a study. To that end, we have added the 'Auto Apply Templates' toggle switch at the top-right corner of the Milestone Templates screen at the study level. This way, our Study Manager level users are able to indicate whether or not milestones should be applied manually, as needed, or automatically once they are published and added to a study.



It should be noted that this would not apply the template to sites created after this switch is activated. For future sites, we recommend using the scheduler for activity plans.

Dashlets

This section describes the dashlets available in the application.

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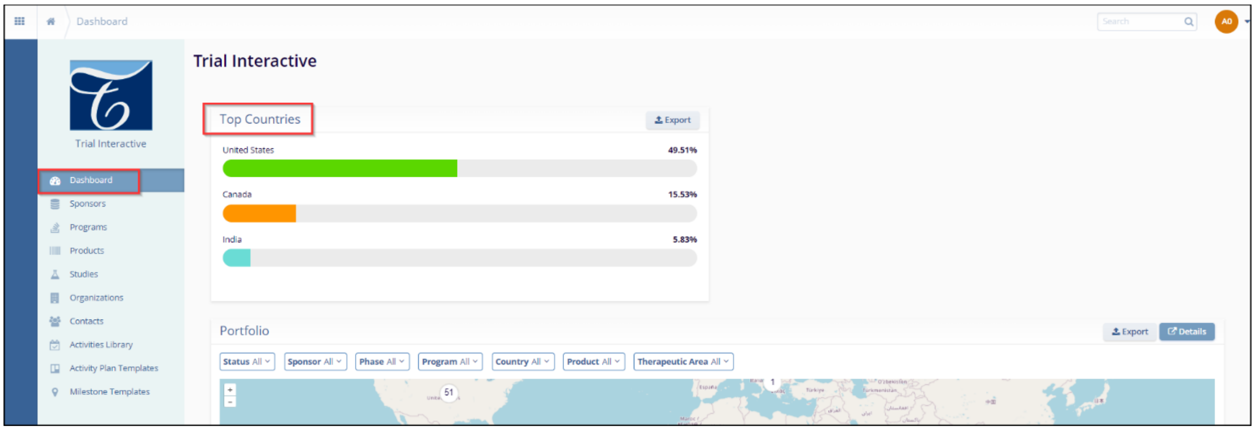
The Top Countries Dashlet

1. Login to the **CTMS** application.
2. Click on the **Dashboard** link in the Navigation menu in the panel at the left side of the screen.
3. This displays 3 **Top Countries** on the screen.
4. This list shows the countries with most activities in the system.



The Portfolio Dashlet

1. Click on the **Dashboard** link in the Navigation menu in the panel at the left side of the screen.
2. The **Portfolio** dashlet is displayed on the screen.
3. Click on the **Details** button in the top-right of the screen to expand the portfolio window.
4. We can use the dropdowns available in the portfolio to restrict our select list to view.

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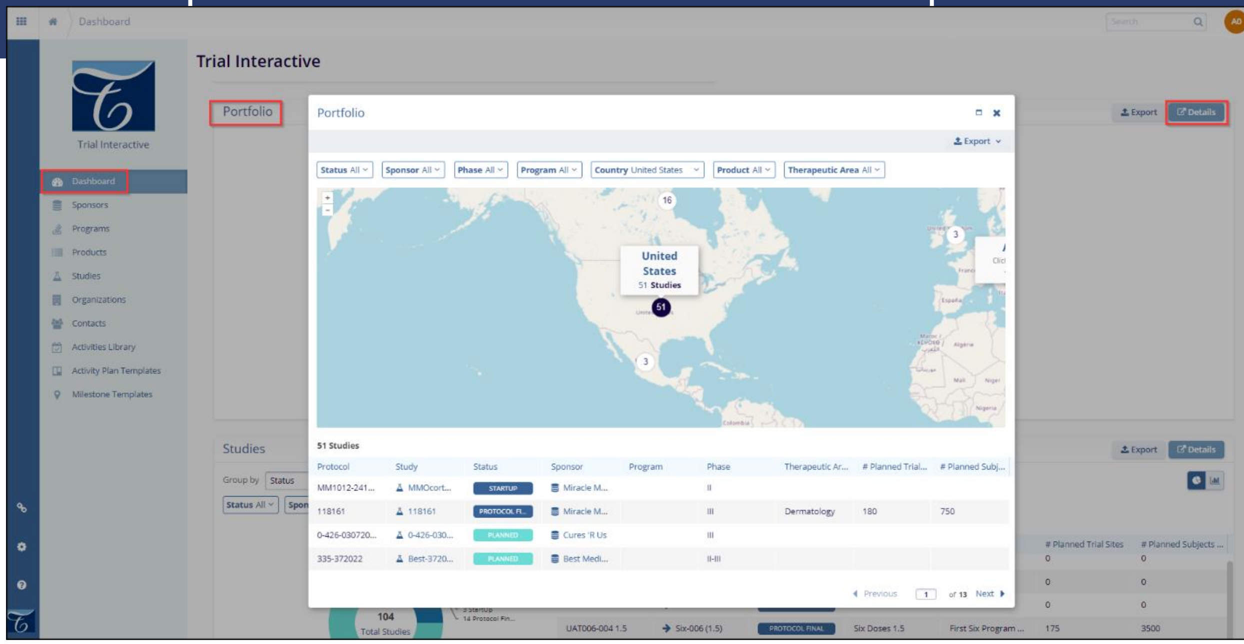

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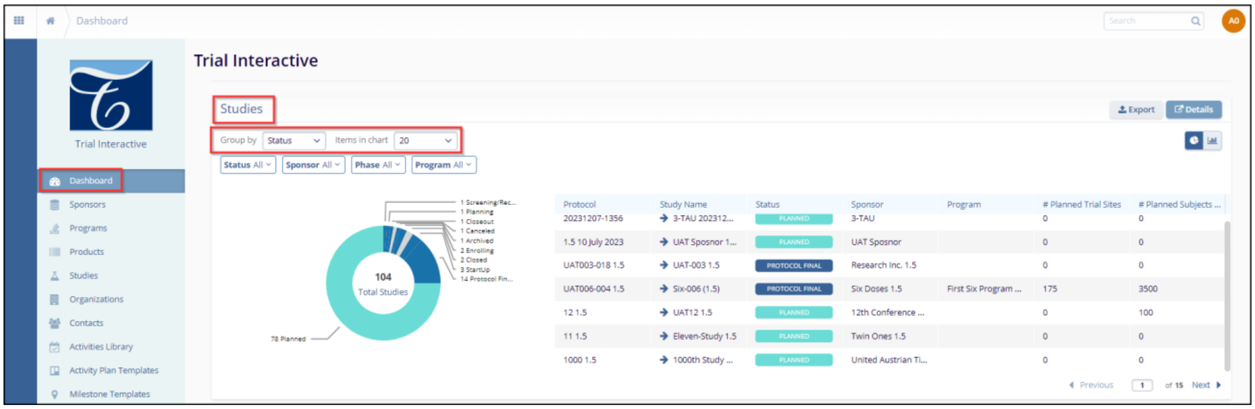
The Studies Dashlet

1. Click on the **Dashboard** link in the Navigation menu at the left side of the screen.
2. Scroll down to Studies in the dashboard screen.
3. This displays the **Studies** information in grid and in pie chart form.
4. We can use the **Group by** dropdown to select a value for grouping.
5. Click on the **Details** button to expand the Studies window.



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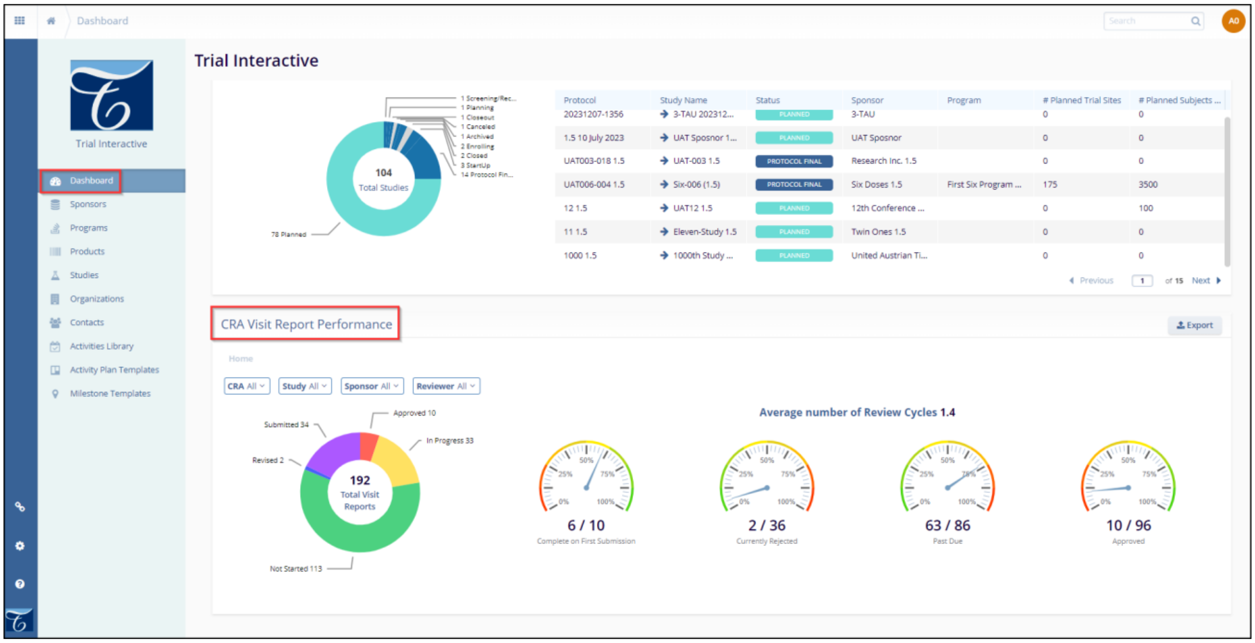
The CRA Visit Report Performance Dashlet

1. Click on the **Dashboard** link in the Navigation menu at the left side of the screen.
2. Scroll down to **CRA Visit Report Performance** on the dashboard.
3. This displays the data in grid and pie chart format.
4. We can use the dropdowns available to filter the search criteria to view.



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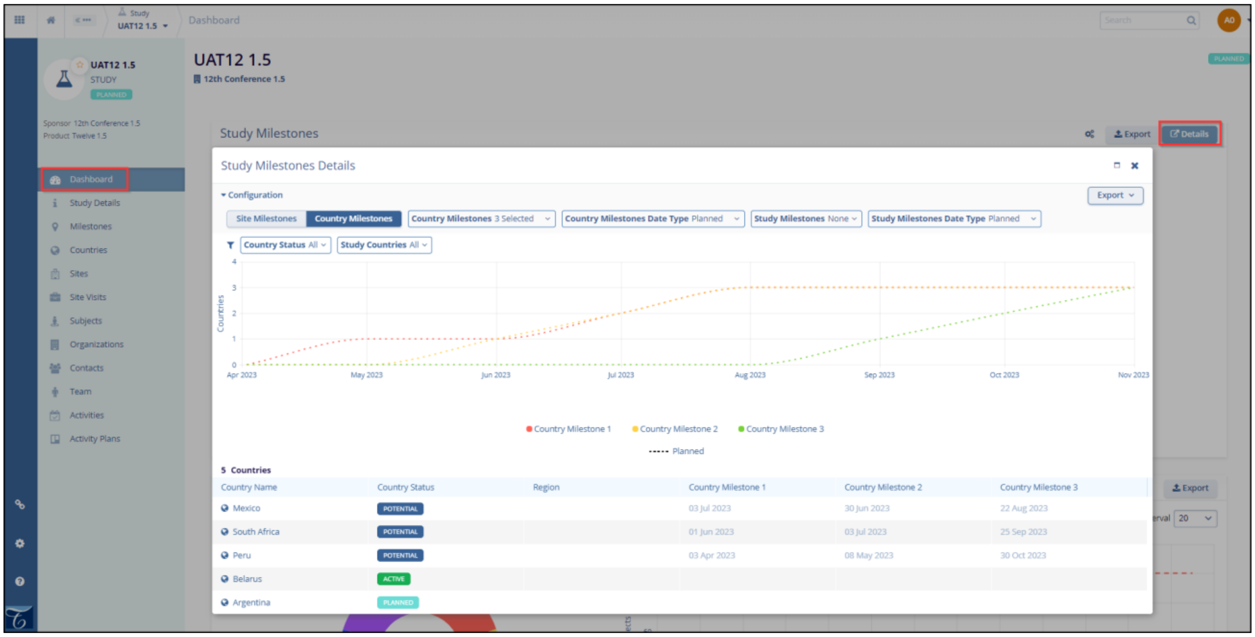
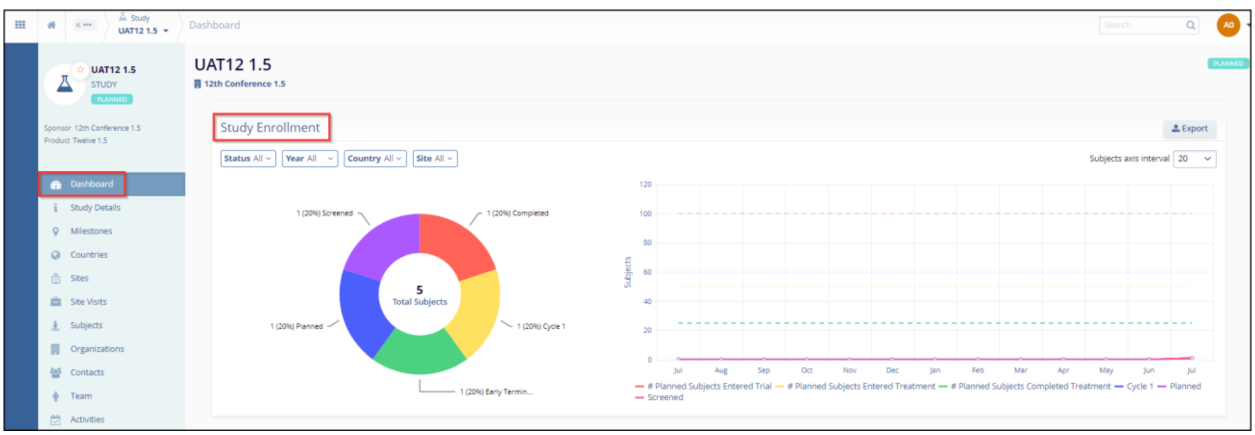
Reviewing Studies via their Dashboard

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
   a. This opens the "Studies" window.
2. Navigate to the study you want to review.
3. **Study Enrollment, Study Timeline, and Activities** dashlets are displayed.
4. The Study Milestone Dashlet is displayed next to the dashboard.
   a. This displays the Site and Country milestones. Apply the required filters to view the milestones.
   b. Click on the **Details** button to expand the studies window.



5. Scroll down to **Study Enrollment** in the dashboard.
   a. This reflects planned and actual numbers.



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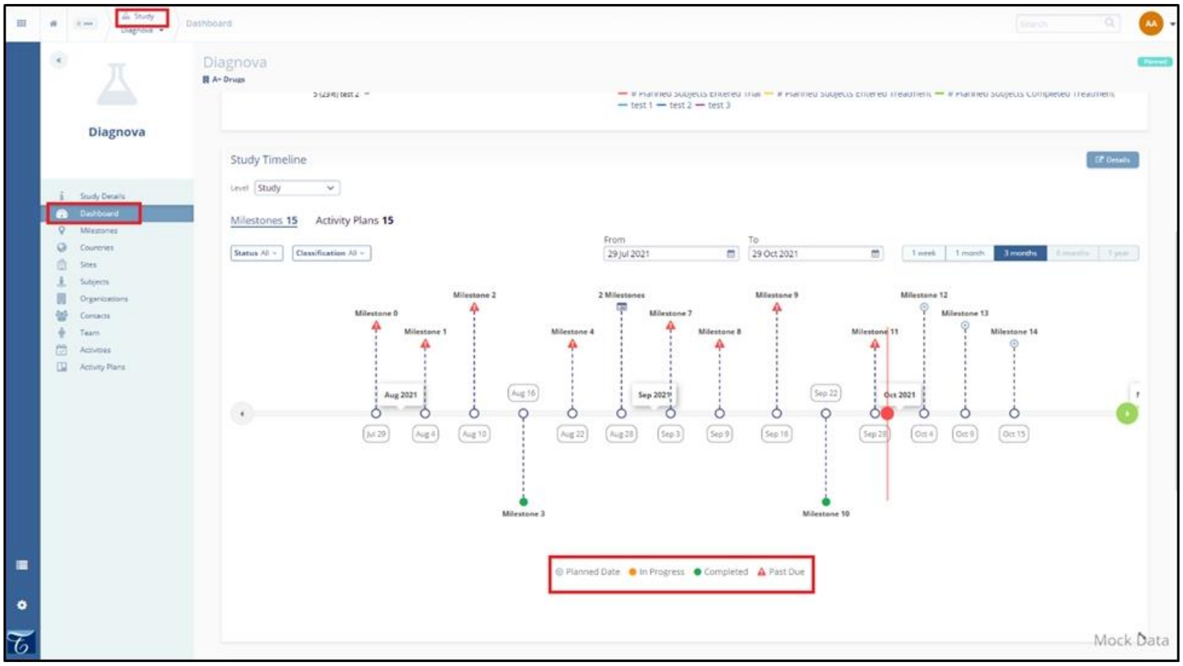
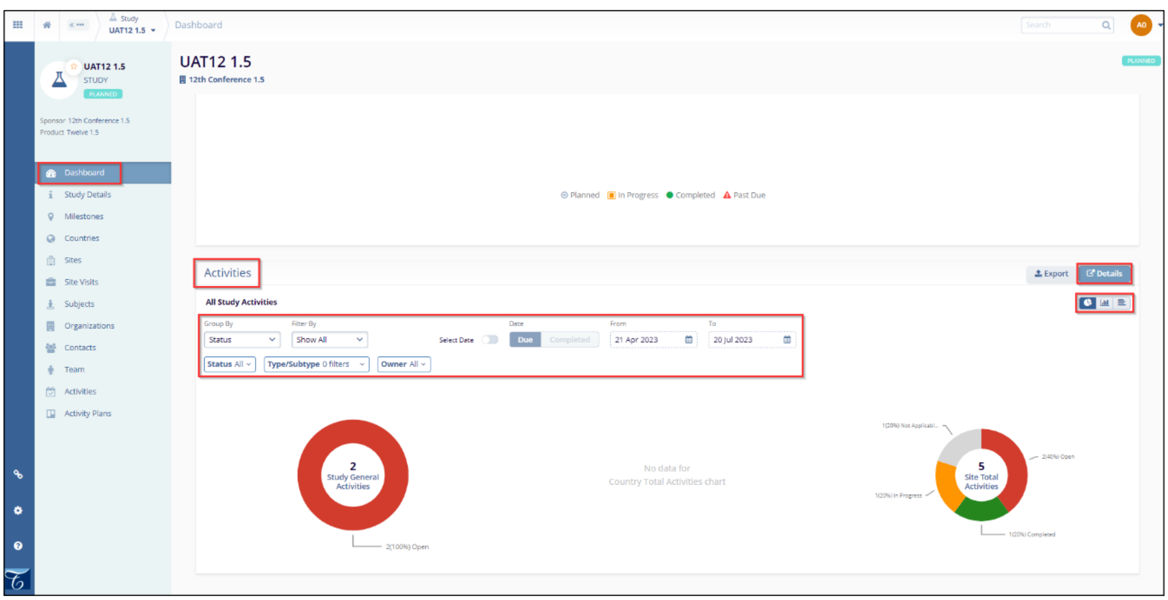
6. Navigate to the **Study Timeline** in the dashboard.
    a. This shows a **red dot** and a **line** indicating today on the timeline.
7. It displays the status of each milestone in the study.



8. Navigate to **Activities** on the dashboard.
9. This shows data for **Study General Activities, Site Total Activities, Country Total Activities** in pie chart, that can be changed to a bar graph if preferred.



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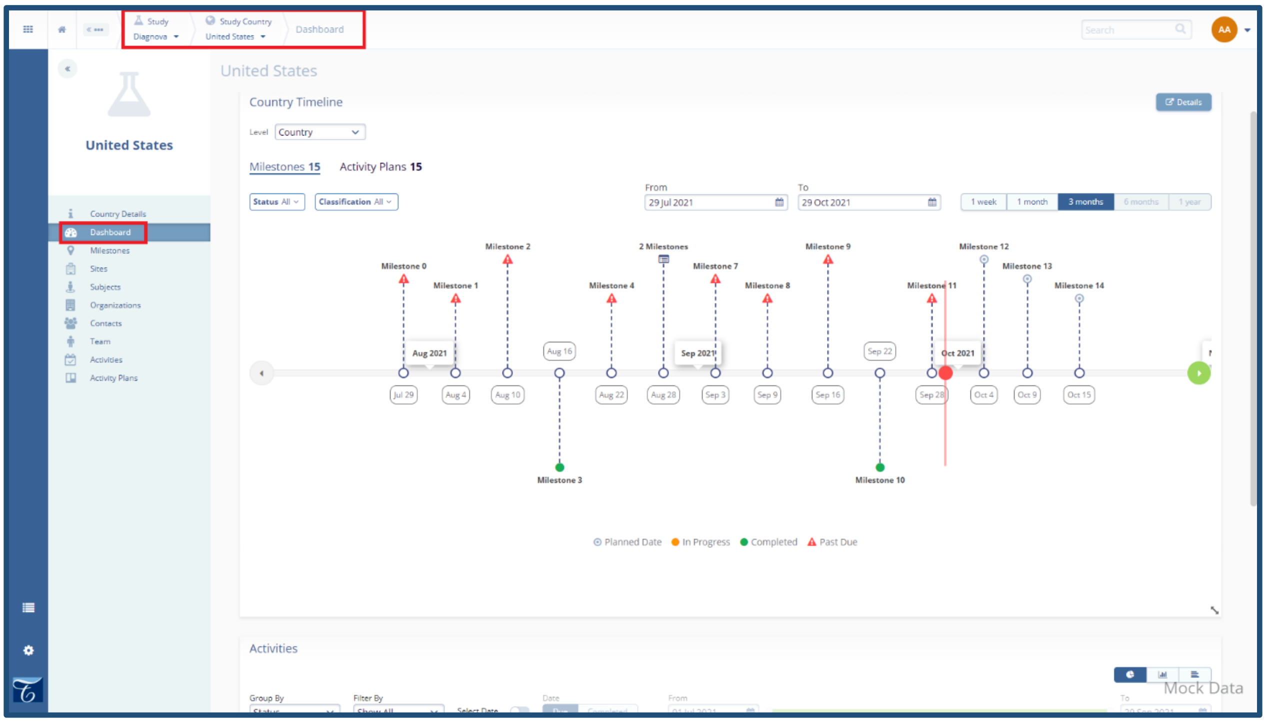
Reviewing Countries via their Dashboard

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
    a. This opens the “Studies” window.
2. Click on the name of the study you want to review.
    a. This opens the dashboard for the study.
3. Click on the **Countries** link in the Navigation menu at the left side of the screen.
    a. This opens the “Countries” screen.
4. Click on the name of the country you want to review.
    a. This opens the dashboard for the country.
5. This displays the **Country Timeline** and **Activities** in the dashboard.



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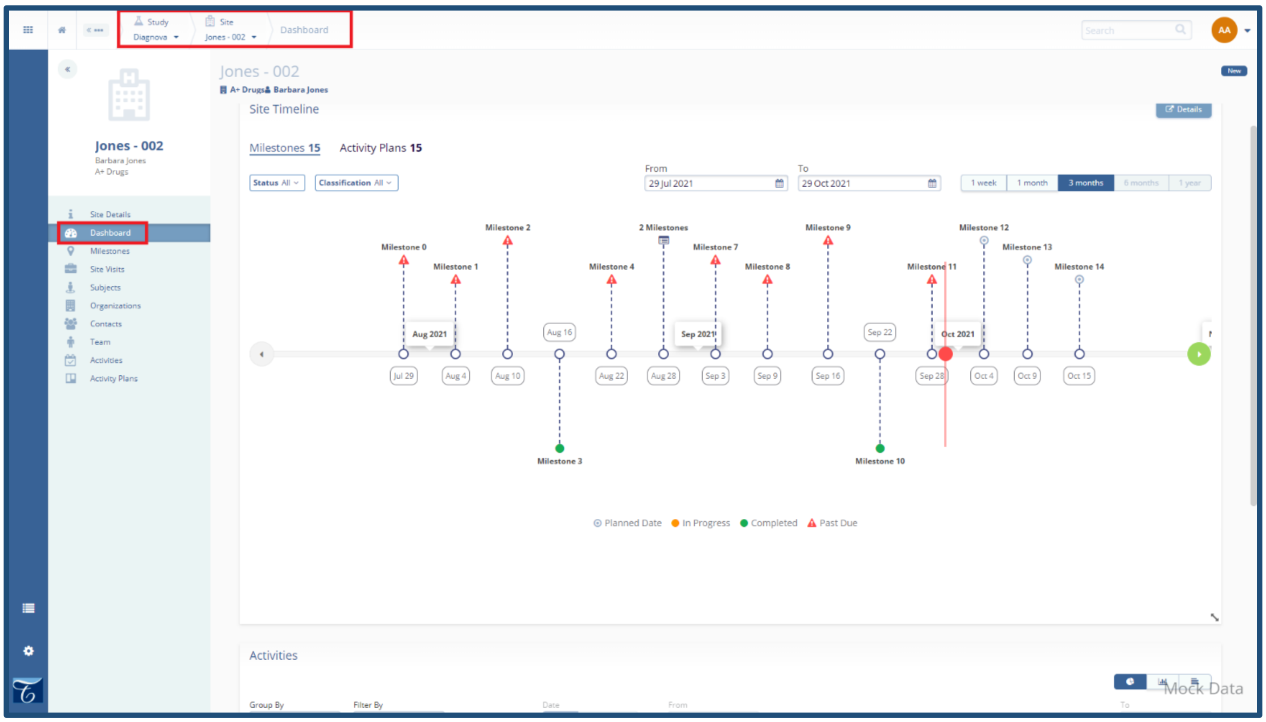
Reviewing Site Dashboard

1. Click on the **Studies** link in the Navigation menu at the left side of the screen.
   a. This opens the “Studies” window.
2. Click on the name of the study you want to review.
   a. This opens the dashboard for the study.
3. Click on the **Sites** link in the Navigation menu at the left side of the screen.
   a. This opens the “Sites” screen.
4. Click on the name of the site you want to review.
   a. This opens the dashboard for the site.
5. This displays the **Site Timeline** and **Activities** in the dashboard.



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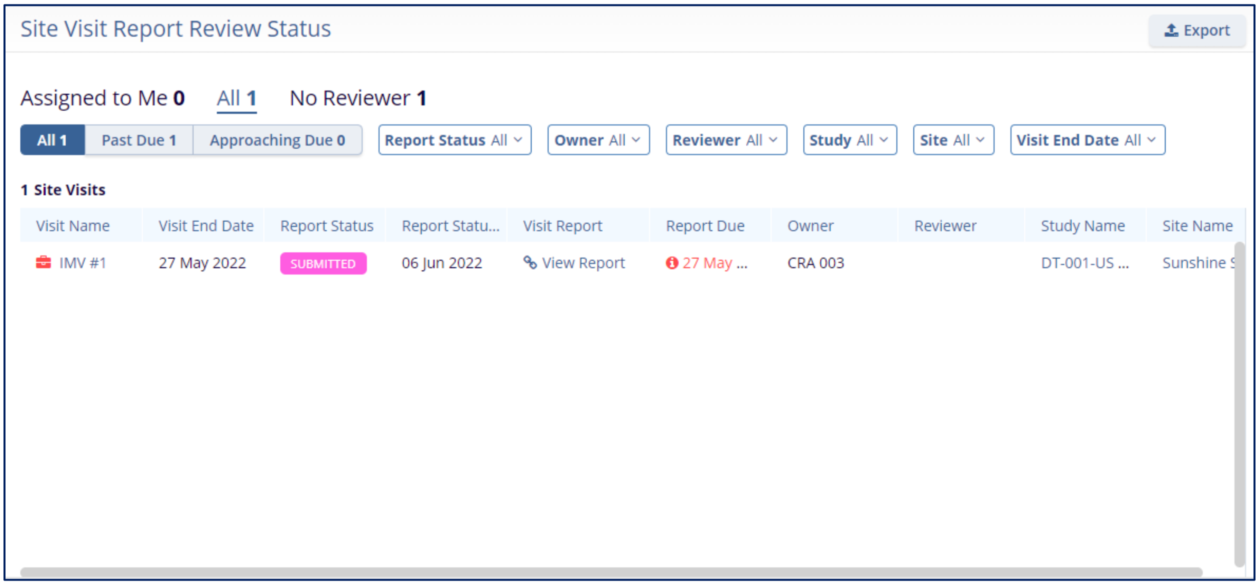
Site Visit Report Review Status Dashlet

The Site Visit Report Review Status dashlet is intended to allow users who are indicated as site visit report reviewers to see the status of any reports generated for their studies. Users can filter their view to identify overdue documents along with a number of other available filters.

Users can navigate directly to the Site Visit in question by clicking on the name of the visit as shown in the grid or they can navigate directly to the report to be reviewed by clicking on the "View Report" link in the grid.



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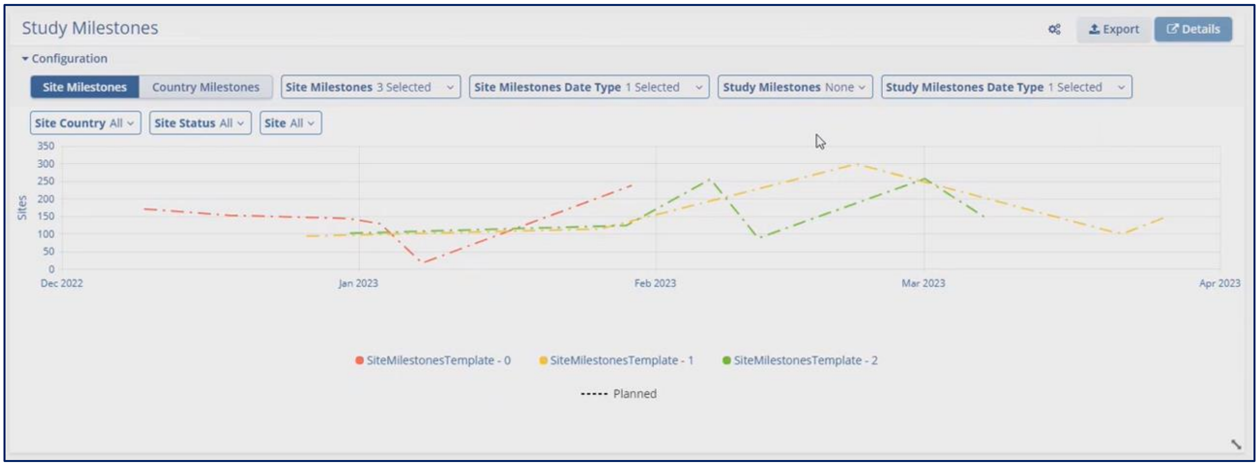
Study Milestones Dashlet

The Study Milestones dashlet will track milestones as defined in the study settings. Please note, no data will be displayed until the relevant fields have values entered in the milestone management area.



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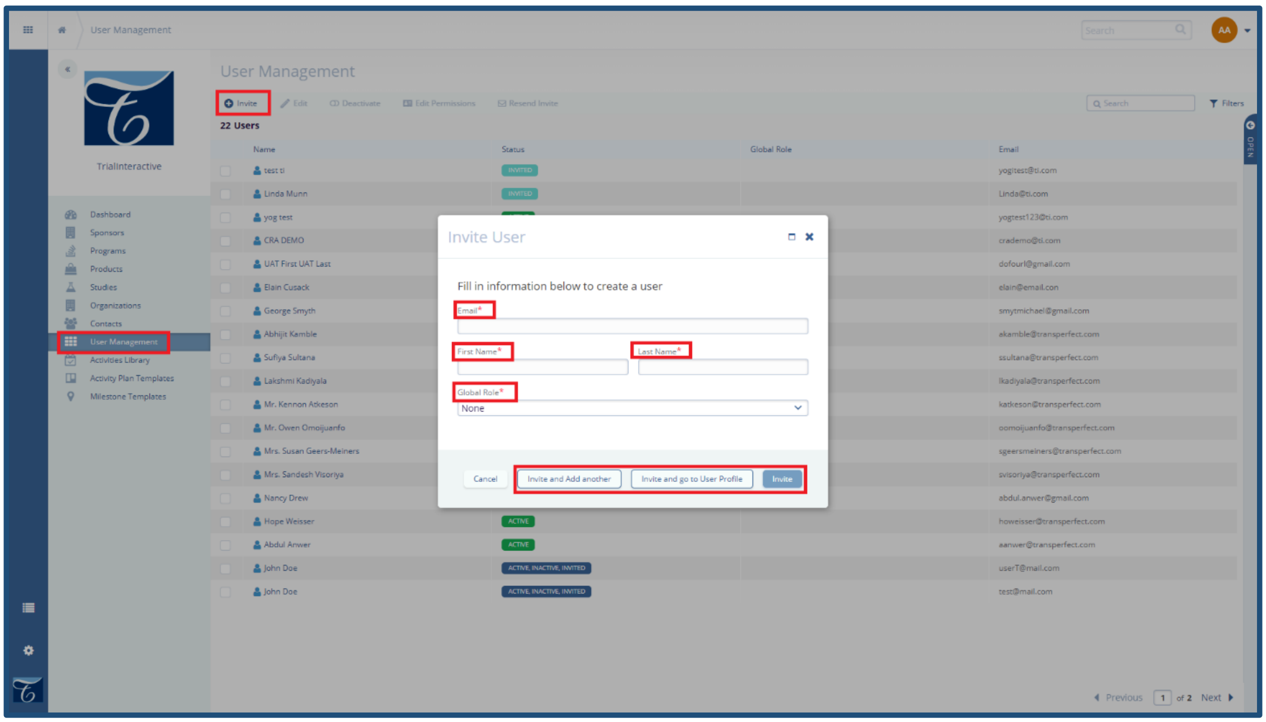
Team Management

This section describes about creation and management of users and teams in the application.

Creating Users

1. Click on the **User Management** link in the Navigation menu at the left side of the screen.
   a. This opens the “User Management” screen.
2. Click on the **Invite** button in the top-left of the screen.
   a. This opens the **Invite User** window.
3. Here we need to enter the required mandatory metadata to create a user i.e., **Email**, **First Name, Last Name, Global Role** as indicated by an asterisk (*) symbol next to the field title.
4. If any of the required fields are missing, an error will appear when we click on the **Invite** button, displaying the fields which need to be filled to invite a user successfully.
5. **(Optional)** Click **Invite** or **Invite and Add Another** or **Invite and go to User Profile** depending on whether you intend to create another user right away.



Editing a User

1. Click on the **User Management** link in the Navigation menu at the left side of the screen.
   a. This opens the **User Management** screen.

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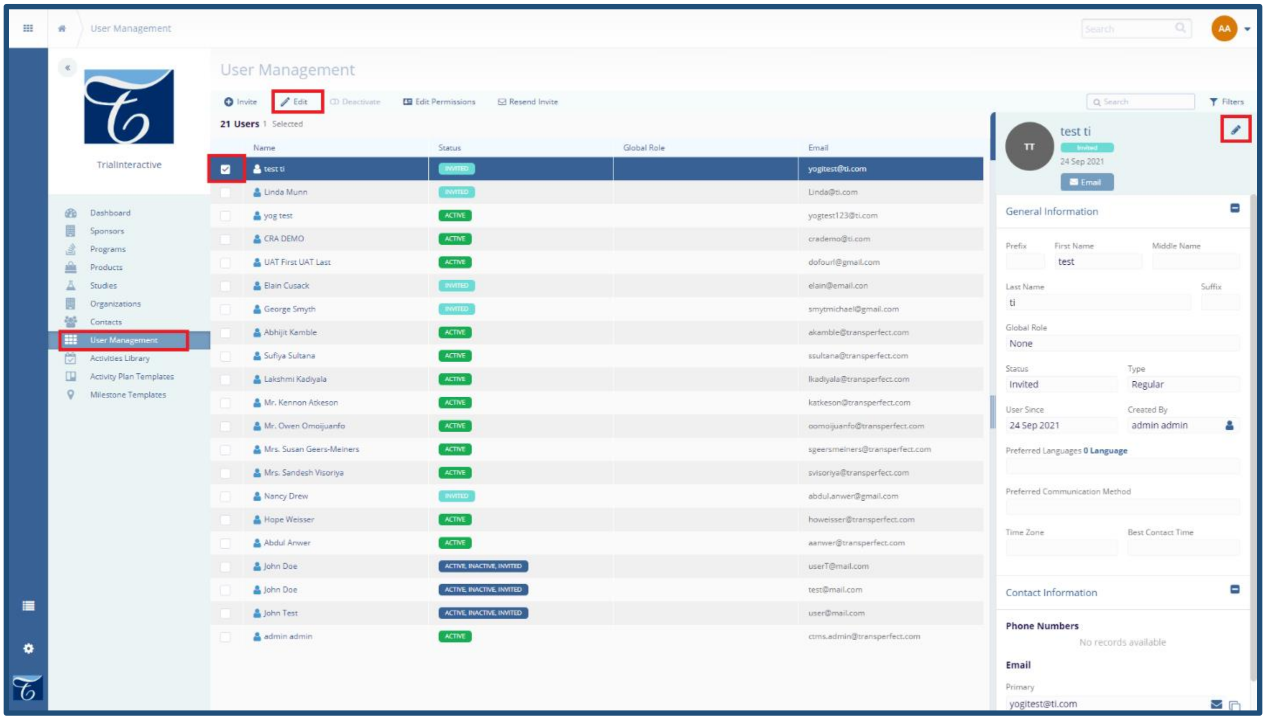
2. Navigate to the name of the user you want to edit and click the check box before the username.
    a. This opens the quick view on the right side of the screen.
3. Click the **Edit** button on the top-left of the screen or click on the **Pencil Icon** in the quick view panel to make changes in the user account.
4. Make any necessary changes to the user account.



5. Click on the **Save** button in the bottom right of the screen, for the changes to apply to the user account.

Editing a User's Permissions

1. Click on the **User Management** link in the Navigation menu at the left side of the screen.
    a. This opens the "User Management" screen.
2. Navigate to the user whose permissions should be edited and **click the check box**.
3. Click on the **Edit Permissions** button in the top-left of the screen.

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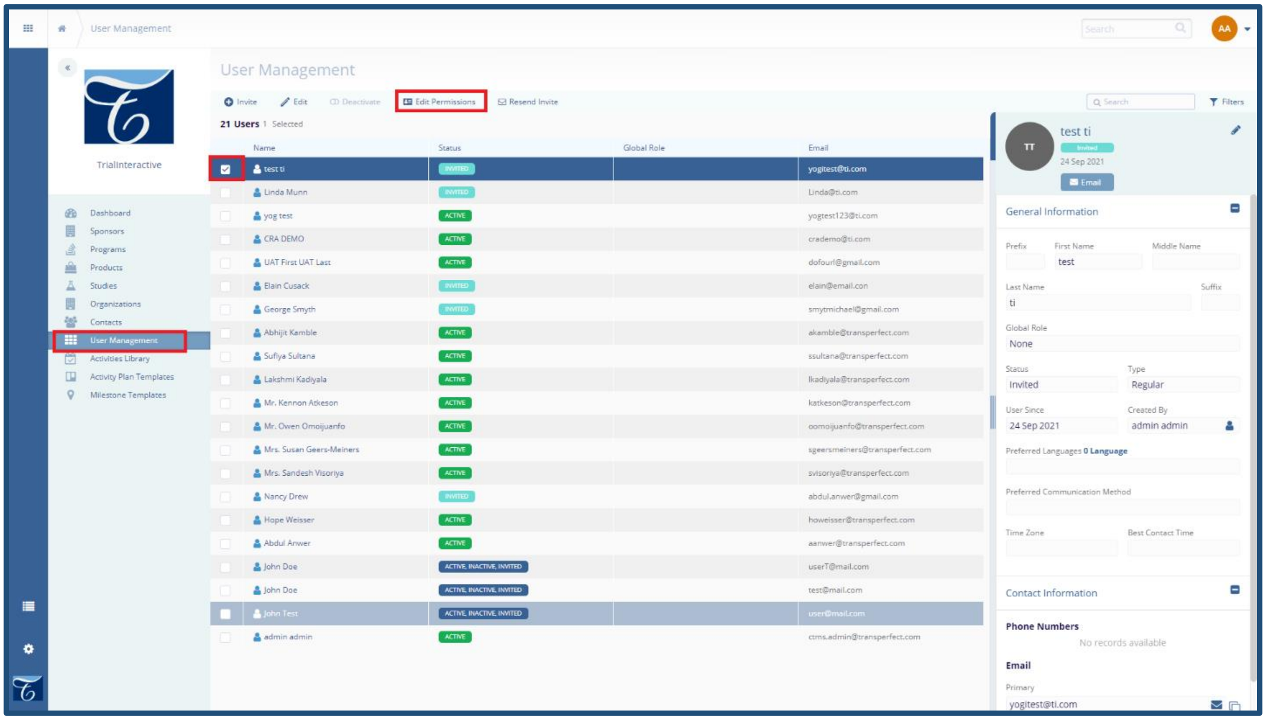
a. This opens the “Edit Permissions” window.

Note: Study membership role is inherited throughout the study team lists and can be updated on the individual entity level to increase the user’s access.



4. Navigate through the list of organizations below or use the search box to find the sponsor.
5. Expand the selected organization and select the appropriate product or study.
6. Assign the user a specific role associated with that product or study.
7. Click on the **Save** button the bottom of the edit permission window.

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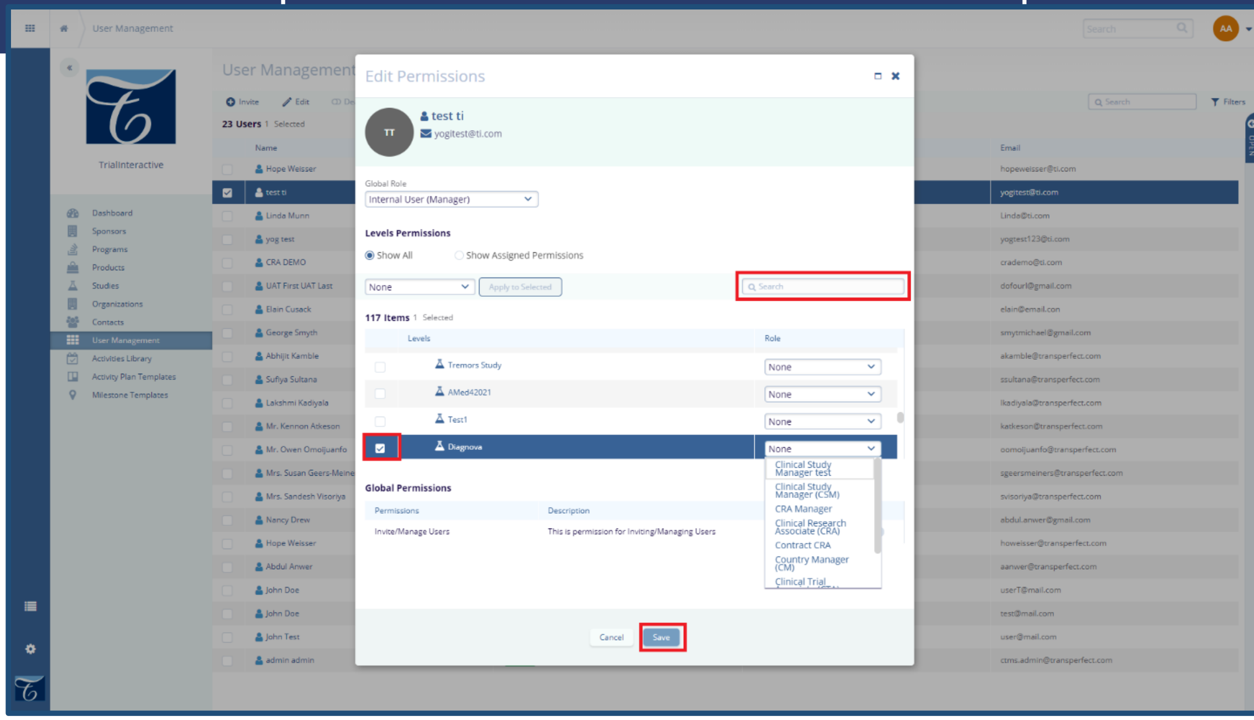

Note: Turning on **Invite/Manage** Users under Global Permissions will allow for the user to create and invite users to the system.

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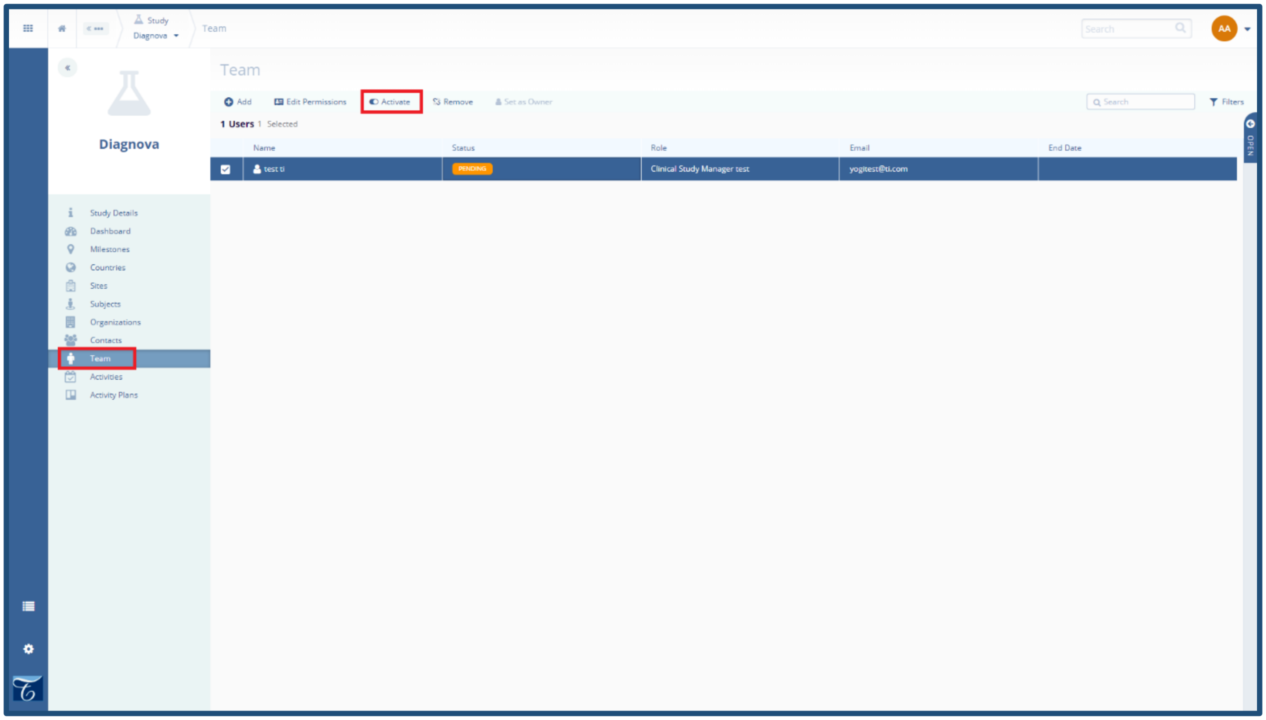
Study Team Management

1. Navigate to the study name and click on it.
2. Click on the **Team** link in the Navigation menu at the left side of the screen.
   a. This opens the "Team" window.
3. Select the username from the list displayed that has the status of **PENDING.**
4. Click on the **Activate** button in the top-left of the screen to activate the user.



Please note that only study team members listed as Unblinded team members will be able to see unblinded study data where applicable. An Unblinded Clinical Study Manager may assign study team members to Unblinded roles but a Blinded Clinical Study Manager cannot.

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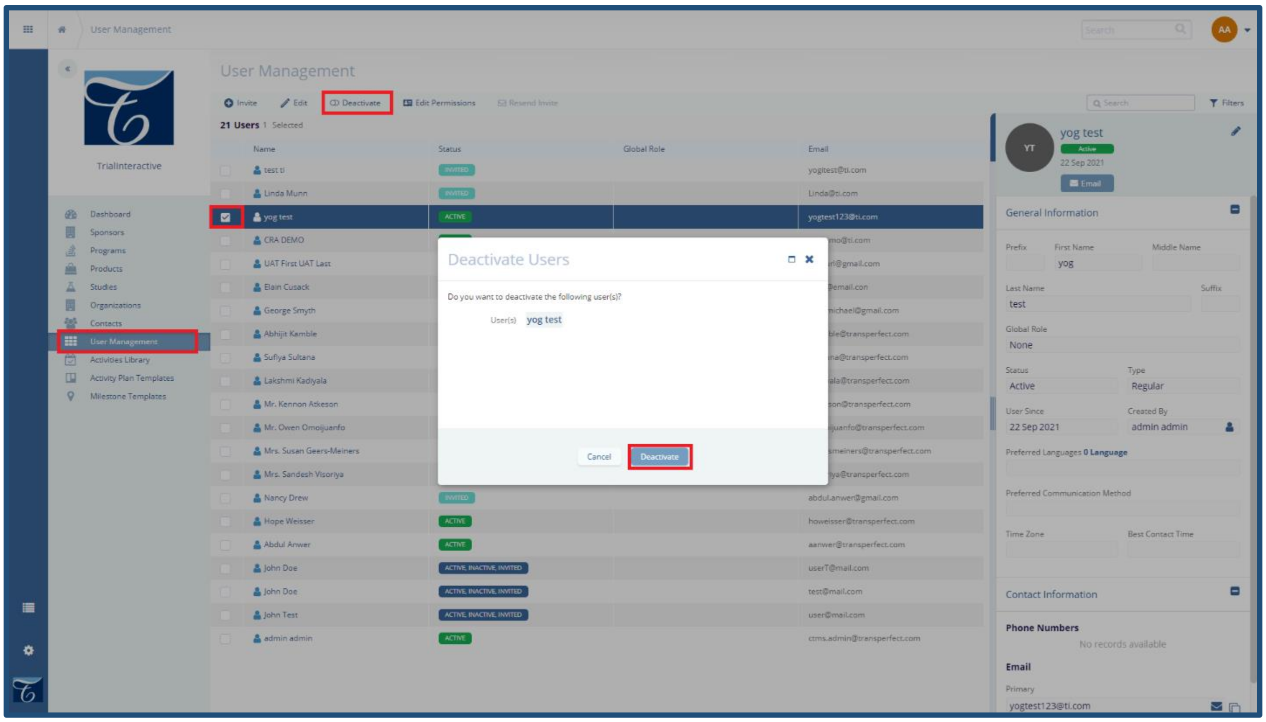
Deactivating a User Account

1. Click on the **User Management** link in the Navigation menu at the left side of the screen.
   a. This opens the **User Management** screen.
2. Navigate to the user you want to deactivate, click the check box before the username.
   a. This opens the quick view on the right side of the screen.
3. Click on the **Deactivate** button in the top-left of the screen.
   a. This opens the Deactivate Users window.
4. Click on the **Deactivate** button in the **Deactivate user's** window.

Note: The reverse of this action can be done to activate a user.



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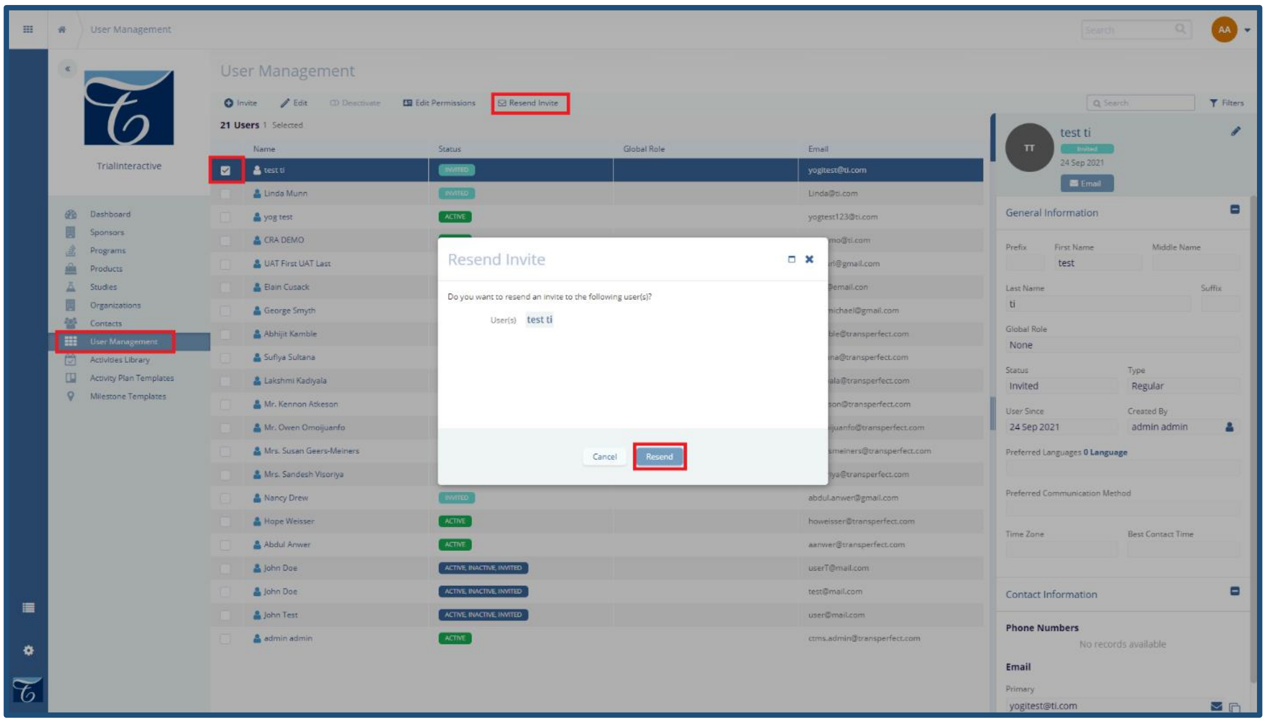
Resending a User's Invite

1. Click on the **User Management** link in the Navigation menu at the left side of the screen.
   a. This opens the **User Management** screen.
2. Navigate to the user whose invitation you want to resend and click the check box.
   a. This opens the quick view on the right side of the screen.
3. Click on the **Resend Invite** button in the top-left of the screen.
   a. This opens the Resend Invite window.
4. Click on the **Resend** button in the **Resend Invite** window.

   Note: You can only resend an invite to a user with an **Invited** status.



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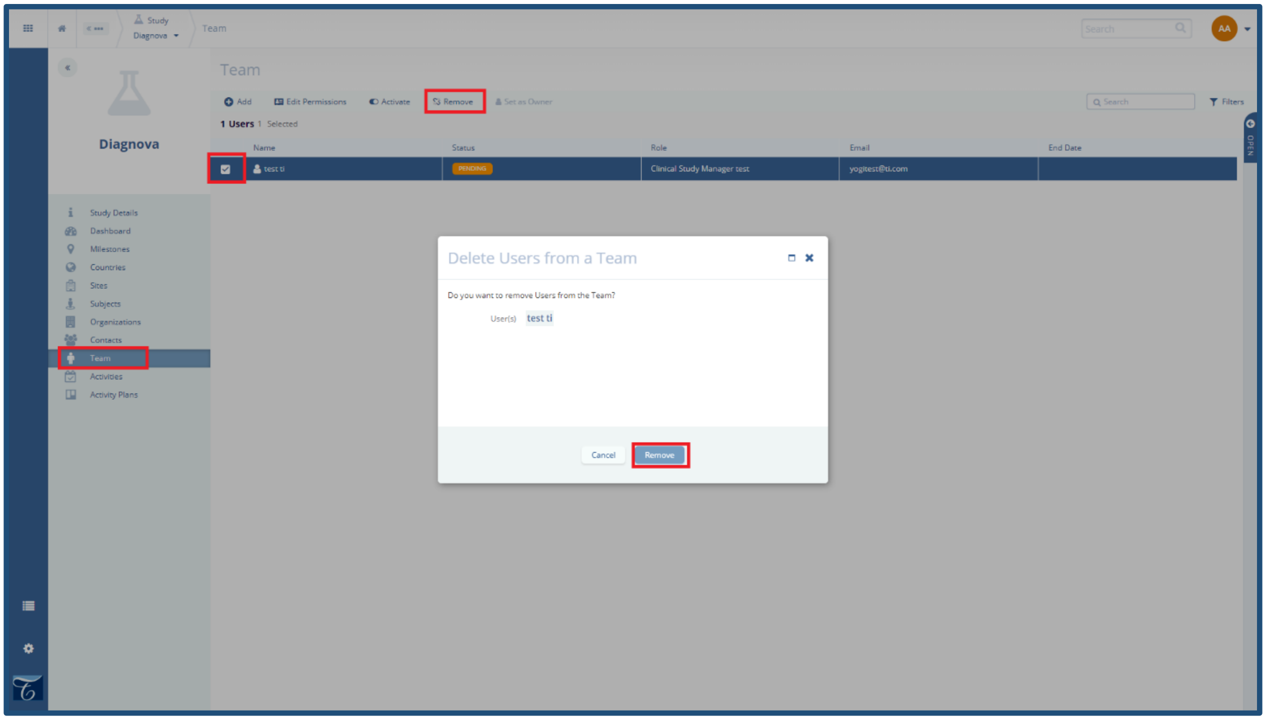
Removing Users from a Team list

1. Navigate to Studies screen and click on the name of the study whose team you wish to edit.
2. Click on the **Team** link in the Navigation menu at the left side of the screen.
3. Navigate the user you want to remove from a team list and select them.
4. Click the **Remove** button in the top-left of the screen.
   a. This opens the **Delete user from a Team** window.
5. Click on the **Remove** button in the bottom of the **Delete user from a Team** window.



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Settings

Users with Company Administrator access to the CTMS will be able to make changes to settings which impact all users.

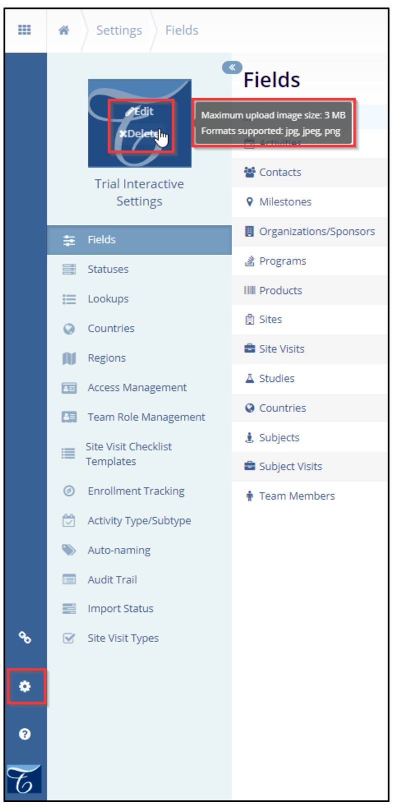
Company Name and Logo

Users can change the name and logo associated with their CTMS environment in order to keep up with the changes that happen over the course of a company's lifetime.

To do this, users will need to navigate to the **Settings** area.

To change the Company Logo:

1. While in Settings, hover over the logo at the top-left of the screen and select one of the available options: **Edit** or **Delete**
    a. Deleting the existing file will remove it from the company environment.
    b. Selecting 'Edit' will allow the user to select a file from their computer for upload. Once the file is selected, it will appear in the logo area at the top-left of the screen.
    Note: The maximum size of the image and the formats supported are displayed after hovering the image. Refer to the screenshot below.



To change the company's name:

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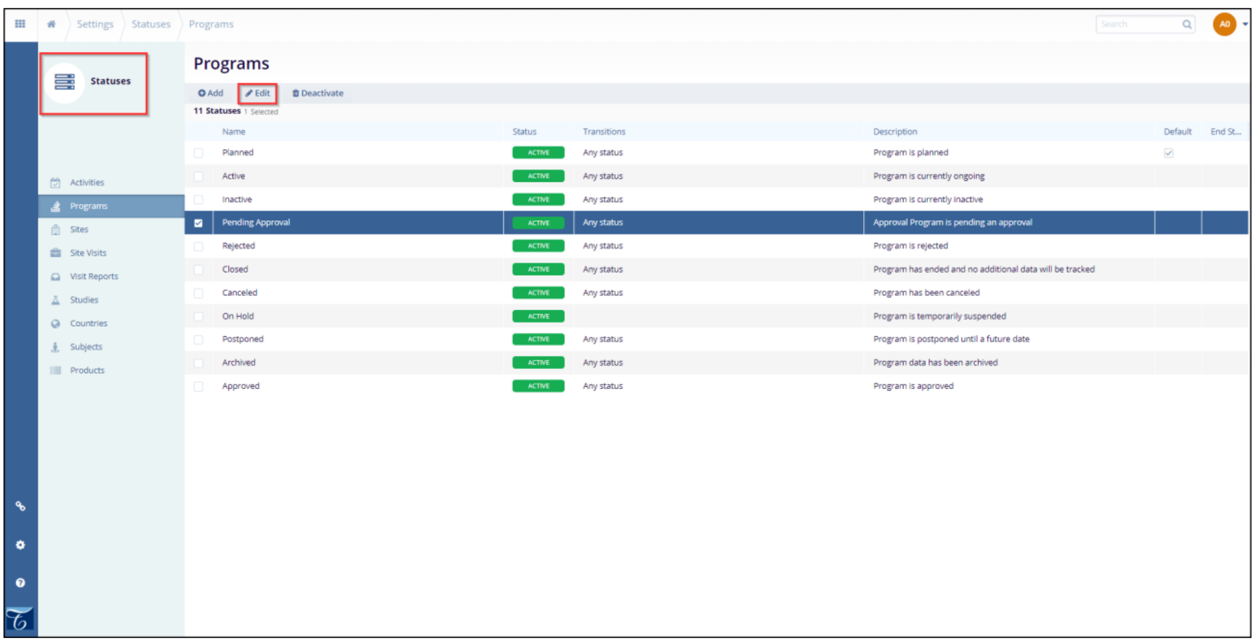
1. Navigate to the **Settings** are and to the **General** menu.
2. Click the '**Edit**' button in the menu ribbon at the top of the menu.
    a. The menu will become editable.
3. Type a new name for the organization into the "**Client Name**" field.
4. Press '**Save**' in the menu ribbon at the top of the menu.

Final Statuses

Users have the ability to indicate which of the available statuses is considered a Final or 'End' status.

To set an 'End' status:

1. Navigate to the **Settings** area and click the **Statuses** menu.
2. Select the particular area of interest (Programs, Sites, etc.)
    a. **Note:** This is not available for all areas.
3. Select the status which should be indicated as an 'End' or 'Final' status using the checkbox.
4. Press the '**Edit**' button in the menu above the list.
5. Check the box in the 'Is End' column (or uncheck the box to indicate a status as non-final)
6. Press the '**Save**' button in the menu above the list.



Custom Fields for Milestones

To create a custom field:

1. Navigate to the **Settings** area and select the **Fields** menu.
2. Select the sub-type (Activities, Contacts, etc.)

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3. Press the ‘**Add Field**’ button in the menu above the list of fields.
    a. The ‘Add Custom Field’ window will open.
4. Select the type of field
    a. Please note that the steps below may vary slightly depending upon the type of field chosen.
5. Press ‘**Next**’
6. Give the new field a name and, if desired, a description.
7. If the new field should be mandatory, check the box next to ‘**Required**’
8. Press ‘**Next**’ and select any other necessary information such as validation options as required.
9. Press ‘**Create**’

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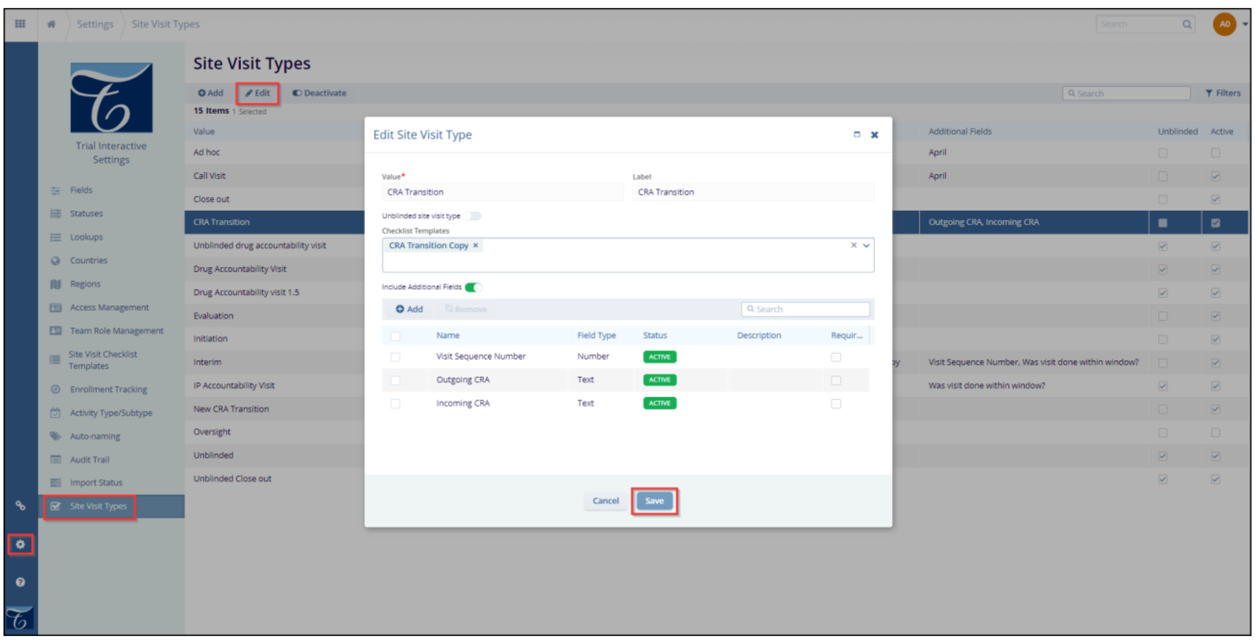
Site Visit Custom Fields related to Visit Types

It is critical to bear in mind that creating a field will not automatically make it available across all visit types. It is likely that any one field will not be applicable to all visit types across the board so, in order to allow for a customized list based on the visit type, once a custom site visit field has been created, the user must navigate to the Site Visit Types in Settings and manually choose to add the new field to the associated visit type before it will be applied.

To apply a custom field to a site visit type:

1. Create the custom field using the steps outlined previously.
2. Navigate to the **Settings** area and go to the **Site Visit Types** menu.
3. Select the site visit type to be edited and press the ‘Edit’ button in the menu above the list of visit types.
    a. The ‘Edit Site Visit Type’ window will open
4. Use the ‘Include Additional Fields’ toggle switch to enable the inclusion of new fields.
5. Press the ‘**Add**’ button
    a. A dropdown will appear in the grid below the ‘Add’ button.
6. Using the dropdown menu, select the appropriate field
7. Press ‘**Save**’.



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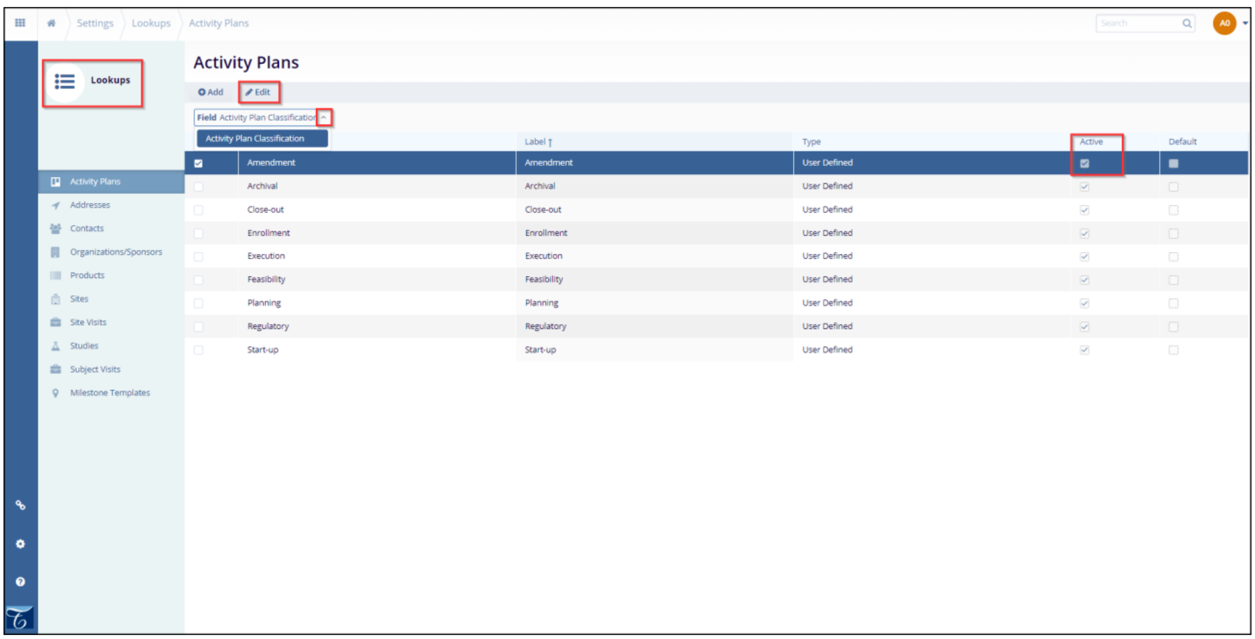
Lookups Field

The term 'Lookups' refers to the options found in various dropdown menus throughout the system. If your group is upgrading to a new version of CTMS which includes additional standard values, in order to avoid impacting current study data, these values will be added in an 'inactive' status and will need to be manually updated if desired.

To activate a lookup value:

1. Navigate to the **Settings** area and choose the **Lookups** menu.
2. Select the sub-menu to be edited (Activity Plans, Addresses, Contacts, etc.)
3. Above the list of values is a dropdown menu indicating which field's values are shown. Use the dropdown menu to select the correct field.
4. Select a value using the checkbox and press '**Edit**' in the menu above the list of values.
5. Check the box in the '**Active**' column
6. Press '**Save**'



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