


TRIAL INTERACTIVE 10.0 – READER GUIDE

Version 1



Approvals

NAME: JAY SMITH Title: Senior Director, Project Management	Reason for signature: I approve this document
Signature:  <small>Electronically signed by: Jay Smith Reason: I approve this document Date: 2020-01-13 21:41:30-05:00</small>	Date: 13-Jan-2020

NAME: SCOTT JORDAN Title: Director, Quality Assurance	Reason for signature: I approve this document
Signature: <i>Scott Jordan</i> <small>Electronically signed by: Scott Jordan Reason: I approve this document. Date: 2020-01-13 21:48:28-05:00</small>	Date: 13-Jan-2020

Version History

Author	Revision	Date	Comment
Yogesh Inamdar	1.0	07-Jan-2020	Initial Creation

Contents

Page Mapping with Topics.....	4
Getting Started.....	7
Help.....	8
Job Aids and Video Tutorials.....	9
Job Aids.....	9
Video Tutorials.....	9
Signing into Trial Interactive.....	10
System Requirements.....	10
Receiving and Responding to Room Invitation.....	11
User Registration.....	12
Signing in with Multi-Factor Authentication.....	13
Signing in on Subsequent Visits.....	16
Requesting a Password Reset.....	16
Signing in without access to rooms.....	17
The Trial Interactive Home Page.....	17
Room Views.....	18
Room Search and Accessing a Trial Interactive Room.....	19
Cross Study Document Search.....	20
Documents Search.....	20
TI Home Page Filters.....	21
Summarized (Overview) View of Rooms.....	21
Detailed View of Rooms.....	22
Marking Favorite Rooms.....	23
Main Navigation and Inter-Room Navigation.....	24
Main Navigation from Home Page.....	24
Main Navigation from within a Room.....	24
Navigating between Rooms.....	25
User Menu.....	26
About This Room.....	26
User Menu - Help.....	27
My Profile Settings.....	27
My Profile Main Section.....	27
My Profile Notifications Section.....	32
Language Settings.....	33
Notifications.....	33
Guide.....	34
Signout.....	34

Index.....35

Page Mapping with Topics

This section gives you an overview of the TI 10.0 topics that are mapped to pages in this help.

Keyword	Topics in help	Recommended Page Title in help	Job Aids	Videos
Login	Login using MultiFactor Authentication Login using Google Authenticator Logging in on Subsequent Visits	Getting Started		
Password	Request a password Reset	Getting Started		
Home Page	Summarized View of rooms Detailed View of rooms	Trial Interactive Home Page		
Uploading and Importing Documents	Uploading documents to room Importing documents to a room	Trial Interactive Home Page Importing Documents and Metadata		
Documents	Deleted and Expired Documents	Deleted and Expired Documents		
Navigation	Main Navigation Changing Rooms from within a room	Main Navigation and Inter-Room Navigation		
Users	Creating, editing and deleting users Inviting Users - Qucik Invite Regular Invite Resending Invitations	Users Management Room Settings → Security → Users		
Groups	Creating , editing, and deleting groups Adding, editing and deleting users from groups	Users Management Room Settings → Security → Groups		
My Profile	My Profile Settings My Profile Notifications	My Profile Settings User Menu		
Dashlets	Dashlets	Dashboard and Dashlets		

Room Index	Index Views	Trial Interactive eTMF and Documets Module → Documents View → The Room Index		
Document Grid	Previewing Documents and Metadata Copying or Moving Documents Documents Context Menu (right-click on a document)	Trial Interactive eTMF and Documets Module → Documents View → The Documents Grid		
Documents Cart	Documents Cart	Trial Interactive eTMF and Documets Module → Documents View → The Documents Grid → Top Ribbon Bar		
Searches	Documents Search, Searching Users, Advanced Search, Room Search	Searches		
Quality Control	Editing an Existing Workflow Auto-Claiming a Document, Reassigning a Reviewer, Resolving a Query	Quality Control Settings Quality Control Process		
Quality Review	Creating an Audit Profile Performing Audits Exporing Audits Performing Audit Response Resolving Queries Adding document back to Audit Profile	Quality Review		
Tasks	Adding, Editing and Deleting Tasks Exporting Tasks Assigning Tasks	Tasks		
eSignature	TI eSignature	eSignature → Signing documents in TI eSignature.		

	Adobe eSignature	eSignature → Signing documents in Adobe eSignature.		
	DocuSign eSignature	eSignature → Signing documents in DocuSign eSignature.		
CRA Reconciliation	Documents Reconciliation	CRA Reconciliation → Documents Reconciliation		
	CRA TMF Reconciliation Report	CRA Reconciliation → Creating and Viewing the CRA TMF Reconciliation Report		
Contacts	View Contacts Contact Data Convert to User(s)	Sites, Required Documents, Countries and Contacts → Contacts		
Sites	Site Views Adding, Editing and Deleting Sites Site Security Importing Sites Exporting Sites	Sites, Required Documents, Countries and Contacts → Sites		
Communications	Communication Inbox Communication Outbox	Communications		
Q and A	Creating Questions and Answers Exporting Q&A Deleting Q&A	Q&A → Q&A Module		
FAQ	Creating, editing and deleting FAQ Emailing FAQ Exporting FAQ FAQ's Cart	FAQ → FAQ Module		

Milestones	Configuring Milestones Adding Milestones to Document Types, Studies, Countries Editing and Deleting Milestones	Milestones and eTMF Completeness → Milestones		
eTMF Completeness	CRA Visit Types	Milestones and eTMF Completeness → eTMF Completeness		

Getting Started

Read this Online Help Roadmap before use.

This Online Help is to assist users to understand and use the TransPerfect Trial Interactive 10.0 platform, which is used by Life Science Companies to conduct eTMF, Study Start-Up, licensing, due diligence, and clinical trial collaboration activities in a secure online environment. This help contains a descriptive overview of the Trial Interactive tool and step-by-step procedures of Trial Interactive functions.

About this Online Help

This online help works the same way as other online helps work. To find the content you are looking for, click the **Chapter** in the help or enter the search text in the **Search** field of the help.

On the Help Home Page

1. The **Home Page** displays the chapter name in large cards.
2. Click a **Chapter** on the help to enter it.






The screenshot shows the 'Trial Interactive 10.0 Admin Help' interface. At the top, there is a search bar and the Trial Interactive logo. Below the search bar, there are six large, light-colored cards arranged in a 2x3 grid. The first card, 'Page Mapping with Topics', is highlighted with a red border. The other cards are: 'How to Use Trial Interactive 10.0 Online Help', 'Job Aids and Video Tutorials', 'Getting Started', 'The Trial Interactive Home Page', and 'Main Navigation and Inter-Room Navigation'. Each card contains a brief description of the content it links to.

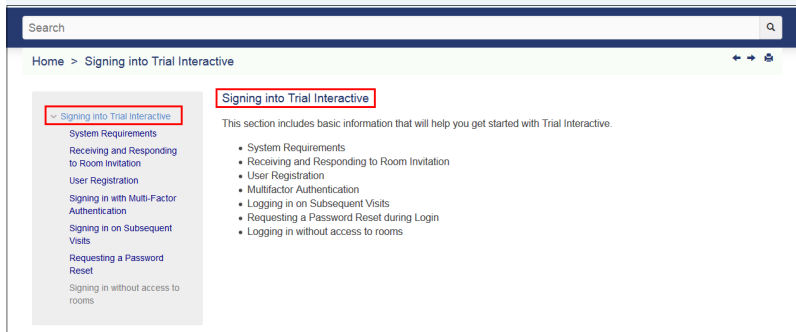
OR

3. Enter a **keyword** in the **Search** textbox to find the topic.

Inside the Chapter

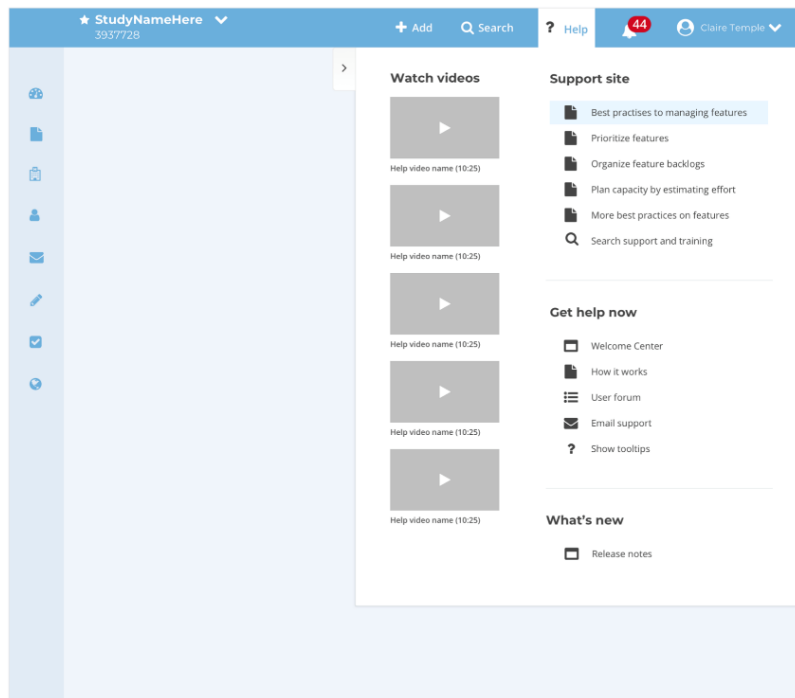
1. Choose a topic from the left panel.
2. To open a topic:

- Click  next to the required topic or sub-topic to expand the hidden content or,
 - Click the topic name to open the topic in the right pane.
3. Click the arrows  on the menu bar to navigate to previous and next topic.
 4. Click the **Home** link on the menu bar to navigate to the Home Page from the current page.
 5. If the topic contains sections in it, they are displayed as links in the **On this page** panel located to the right of the page. Click a link to navigate to a section directly from the **On this page** panel.
 6. Click  on the menu bar to expand/collapse sections of the topic.
 7. Click  to print the current page of the help.
 8. Click a screenshot to open the **full size view**.
 9. Click the **Trial Interactive Logo** or the **Title** of the help to navigate to the Home page.
 10. Click the  on the top right corner of the help to navigate to the **Index** entries.
 11. Inside the topic, the **Selected** topic appears in **Blue** on the left of the help as shown in the screenshot below:



Help

Through the Help link expect to get access to Training Videos, Online Help, Support Site, Latest releases besides many more.



Job Aids and Video Tutorials

This section provides you access to various Trial Interactive 10.0 Job Aids and Video Tutorials.

Click the respective links to access the **Job Aids** or **Video Tutorials** from the left panel of this help.

Job Aids

Click anyone of the links below to open a job aid in a separate tab:

- [How to Manipulate Document Pages](#)
- [How To Do Page Manipulation](#)
- [How to Merge Documents](#)
- [How to Redact](#)
- [How to Remove Expired Documents on Dashboard](#)
- [How to Create Amendments](#)
- [How to Upload a Document](#)
- [How to Enable Document Publishing to eTMF](#)
- [How to respond to an Audit Finding](#)
- [How to Restore a Deleted Document](#)
- [How to Create an Ad hoc report](#)
- [How to use CRA TMF Reconciliation](#)
- [How to Run TMF Reconciliation Report](#)
- [Topics Mapping to Pages in Help](#)

Video Tutorials

⚠ **Important:** Right click on any of the links and click **Open Link in New Tab** to open the video in a new tab.

Click anyone of the links below to play the Videos:

1. [How to Audit as Regulatory Inspector](#)
2. [How to Modify the Index](#)
3. [How to View Reports](#)

Signing into Trial Interactive

This section includes basic information that will help you get started with Trial Interactive.

- System Requirements
- Receiving and Responding to Room Invitation
- User Registration
- Multifactor Authentication
- Logging in on Subsequent Visits
- Requesting a Password Reset during Login
- Logging in without access to rooms

System Requirements

Know the required browsers and operating systems to access Trial Interactive.

To get the best experience on Trial Interactive, make sure your web browser and operating system meet the recommendations mentioned below. You can upgrade to the latest browser version by using these links:



To access Trial Interactive you need to have the following:

Get access to Trial Inteactive on:	
General	Make sure you have: <ul style="list-style-type: none"> • Broadband Internet Access • A browser that supports encryption • Cookies enabled
Standard Supporting Browsers	Trial Interactive works on the following browsers: <ul style="list-style-type: none"> • Internet Explorer 10 and higher • Edge: Version 20 or later(officially supported by Microsoft only) • Chrome for Windows users • Firefox and ESR Releases for Windows users • OS X Safari for Mac Users

Required Operating Systems	Windows® operating system: <ul style="list-style-type: none"> • Windows 7 and higher Macintosh® operating system <ul style="list-style-type: none"> • Mac OSX releases
Client Software	Client Softwares required for Trial Interactive are: <ul style="list-style-type: none"> • For Edit Online: Microsoft Office 2010 SP1 or higher • Optional: Adobe Acrobat, Adobe Standard, or Professional Version 8 or higher along with the PDF Viewer • For SAS Datasets: SAS Viewer or compatible. The free version is available on: https://support.sas.com/downloads/browse.htm?fil=&cat=74
Optional Add-Ons (Separate License)	Besides the above softwares, make sure you also have: <ul style="list-style-type: none"> • DocuSign Standard and DocuSign 21 CFR Part 11 (Latest Cloud Version) • Adobe Sign (Latest Document Cloud Version)

If Trial Interactive 10.0 is accessed through any of the unsupported browsers, or operating systems mentioned above, a message is shown.

With Trial Interactive 10.0, a user will be logged out if the user is logged on multiple sessions in different browsers at the same time.



Note: *To enable multiple sessions at the same time, the administrator needs to enable it for you while inviting a user to room.*

Receiving and Responding to Room Invitation

Once a Trial Interactive room Administrator has sent you an invitation, you will receive an email message with a welcome message and a Registration link.

CNS102915 TMF Invitation



Inbox x



demo@trialinteractive.com

to me ▾

Welcome to CNS102915 TMF. You have been invited to participate in the study room for CNS102915 TMF.

In order to use the site you will need the following software:

- Google Chrome, Microsoft Internet Explorer, OR Mozilla Firefox
- Adobe 7.0 and above
- Software for any additional file types hosted

Follow the link below to register if it's your first time on Trial Interactive, or simply join the site as a returning member with our assistance.

Please do not reply to this email.

Please follow the link below to register:

[Registration link](#)

This message may contain confidential and privileged information. If it has been sent to you in error, please reply to the sender.

Figure 1: Room Invitation Email

Click **Registration link** near the bottom of the message, and you are directed to the Trial Interactive user account registration page. Follow on to [User Registration page](#) for the complete process.

User Registration



Important:

1. You register to the application only once as a first time user when you are [invited to a room](#) through an email.
2. Once you register, you can sign into your room.
3. If you are invited to other rooms hereafter, you need not register again, but just need to sign in to access the rooms.
4. For all subsequent invitations to rooms, you are notified by emails.

After you have received your invitation email with a welcome message and Registration link, you will need to follow the steps as below to register:

Step 1: Registration - Required Information

Registration Step 1 ● ○ ○

Required information
Your user account gives you to invitation-only rooms hosted on Trial Interactive

First Name* Last Name*

Email*

Password* Strong

Confirm Password*


Please select the secret question and answer for your password recovery

Question 1*

Answer*

Password requirements:
 1. Must have at least 8 characters
 2. Must contain one uppercase letter and digit OR one special character
 3. Valid special characters are !@#\$%


1. Click the Registration link near the bottom of the message, and you are directed to the Trial Interactive user account registration page.
2. Type in your first name, your last name, and your email address as requested on the page in the appropriate fields.
3. Create your secure password, and confirm the password by re-typing it in the **Confirm password** field.

 **Note:** Hover the mouse over the Password field to see the tooltip on password requirements.

4. Select your password recovery question from the dropdown list.
5. Type in your answer in the **Answer** field and click **Next** to take you to **Step 2**.

Step 2: Registration - Optional Information

In this page enter your contact address, phone number and other details as required and click **Next** to take you to **Step 3** or **Previous** to take you to **Step 1** if you want to change some information.


 **Note:** You can skip this page and fill it up later from your User Login after you have logged in.

Step 3: Registration - Custom Information

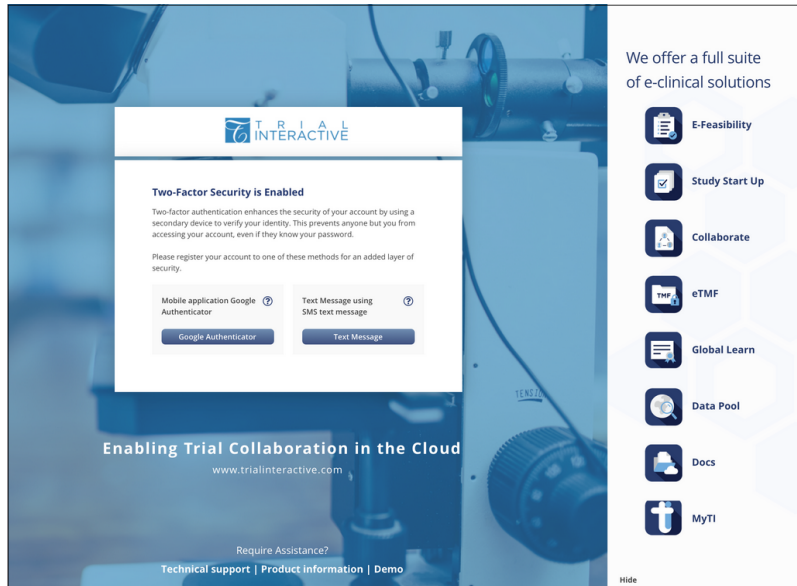
Enter your contact email ids. You may want to click **Previous** to go back and verify the information entered or click **Register** to be taken to a confirmation page.

Click the link to the secure Trial Interactive website to [login](#) and begin work.

Signing in with Multi-Factor Authentication

 **Note:** Users are prompted to authenticate the login credentials using the Multi Factor Authentication only if it is enabled for them in a room.

After you have registered to TI and proceeded to login the first time, you will be lead to the **Setup Multi-Factor Authentication** page if your system is enabled for Multi-Factor authentication using **Google Authenticator** and **Text Message (SMS)**.

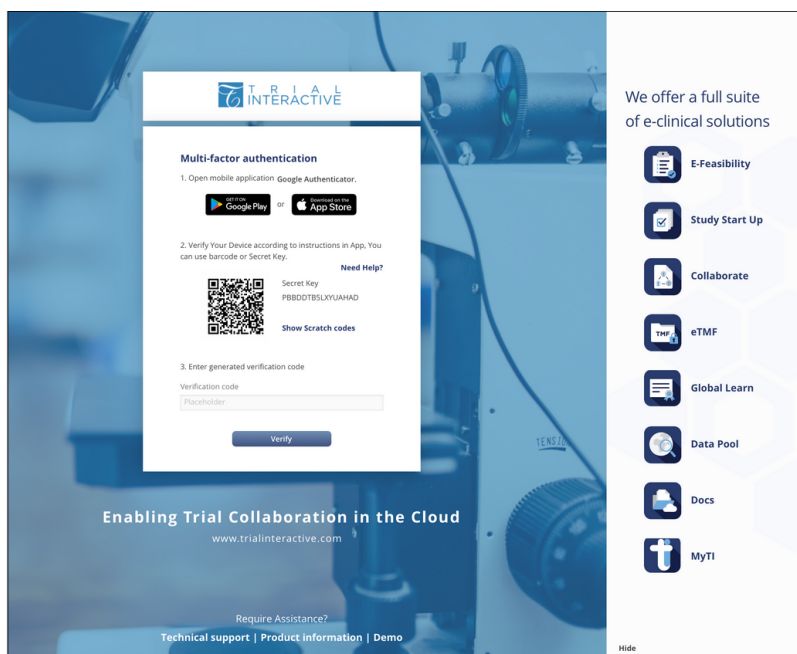


The user can choose to either login using **Google Authenticator** by scanning the bar code on the computer or use **Text Message (SMS)** functionality for login in. Each of these functionalities are discussed in detail in the sections below:

Signing in using Google Authenticator

On this page you will need to enter the verification code generated by Google Authenticator. For this you will need to do the following:

1. Select the method **Google Authenticator** from the **Two Factor Security**.
2. The **Multifactor Authentication using the Google Authenticator** page opens.
3. From Google Play Store or App Store on your mobile device, install **Google Authenticator**.
4. Add your Trial Interactive account by **scanning the bar code** on your computer's Login screen from your mobile device, or enter the **Secret key** in the field provided by your Authenticator on your mobile device. Refer to the screenshot below:

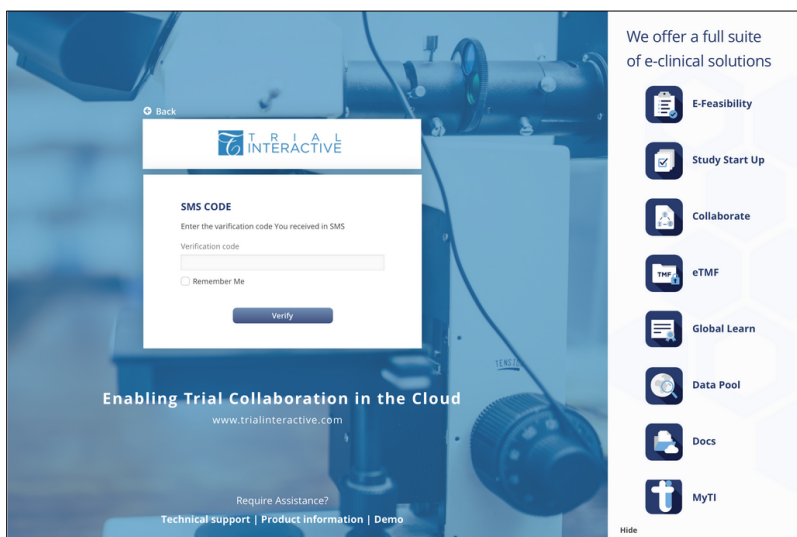


5. The above step will generate a **verification code** on your mobile device.
6. Enter the verification code on the **Setup Multi-Factor Authentication** page on your computer. Click **Verify**.
7. You will now be logged in.
8. When you log in for a [Subsequent Visit](#), you will only be asked for the verification code generated by Google Authenticator after you have entered your login credentials.

Signing in using Text Message (SMS)

Follow the steps below to login using text message:

1. On selecting the **Text Message** method from the Two Factor Security page, you will be asked to enter your **phone number** .
2. Enter the phone number and click **Save**.
3. The **SMS Code** is then sent to your registered mobile number.
4. Enter the **SMS Code** received in your mobile device on the computer screen. Click **Verify**. Refer to the screenshot below:



5. You will now be logged in.

- When you log in for a [Subsequent Visit](#), you will only be asked for the **SMS Code** which is received in your mobile device after you have entered your login credentials.

Signing in on Subsequent Visits

To log in to Trial Interactive

- Using your preferred internet browser, navigate to <http://www.trialinteractive.com>
- Click the **Client Login** button located at the top right corner of the page
- The Trial Interactive Login page with links to a suite of e-clinical solutions offered by TransPerfect Life Sciences appears.

Click the links to delve further into the solutions provided by TransPerfect Life Sciences or login.

- Enter the **Username** and **Password**. The **Username** is the full email address that was submitted by the client-appointed Administrator.
- Click **Login**.

If you are logging in the first time, the Trial Interactive [Homepage](#) for the account associated with the login username appears, else you are redirected to the same location in the application that you were in upon a subsequent login.



Note: You can bookmark <http://www.trialinteractive.com> on your browser for easier access to the Trial Interactive corporate homepage. By accessing Trial Interactive through this site, you will consistently see news and new information about Trial Interactive.

Requesting a Password Reset

In the event that you have forgotten your password, click **Forgot Your Password?** at the bottom of the login window to initiate an account password reset.

Users do not need to contact the Help Desk. In most cases, the user can perform the Password Reset operations without any outside help.

Password Reset

We'll email you a link to a page where you can easily create a new password.

To assure our messages are not accidentally filtered out, please add origami-support-tilatest@protonmail.com to your Address Book or Safe Sender List.

Email

< [Back to Login](#) Reset Password

- Enter your email** address in the field provided.
- Click **Send Request**. The next window in the Password reset wizard opens.
- You will receive an email with the **Reset Password** link.
- Click the link to lead you to the **Password Reset** page.

5. Respond to the security questions and click **Next**.
6. You are taken to the **Change Password** page. Enter the new password and confirm again.
7. Click **Set new password**.
8. The system confirms that the password was successfully reset. Click **Back to the login page** to login with your new password.

Signing in without access to rooms

If a user who does not have access to rooms in the system tries to log in, such a user is automatically logged off and redirected to a separate advisory page. A user might not have access to rooms if the user's access to the rooms have expired or revoked.

Refer to the screenshot below for a view of a typical advisory page.

Click the **Logout** button to redirect to the standard login page.

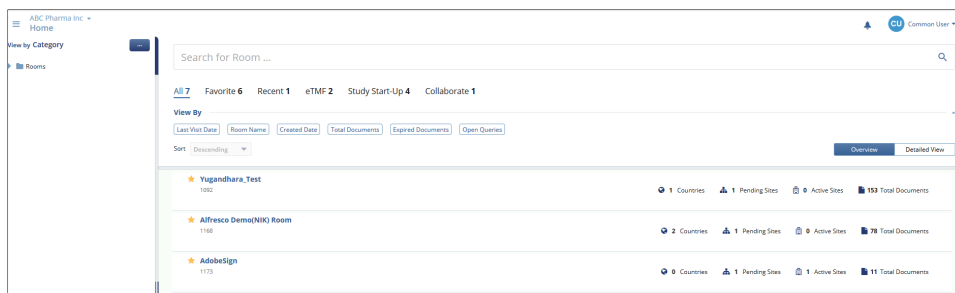


Note: You can contact the helpdesk if you want to configure a different message to be displayed in the advisory page.

The Trial Interactive Home Page

From this Default Landing Page of Trial Interactive, access rooms as well as Overview and Detailed summary of rooms.

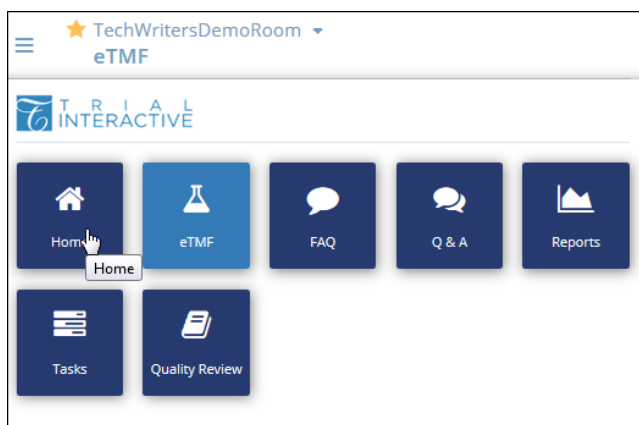
After signing in to Trial Interactive, you are landed on the Trial Interactive Home Page as shown in the screenshot below:



Click the required Room Name to enter a room.



Note: Once inside a room, you can reach this page from the [Main Navigation](#) by clicking the **Home All Rooms** icon. Refer to the screenshot below:




You can do the following from the Trial Interactive 10.0 Home Page:

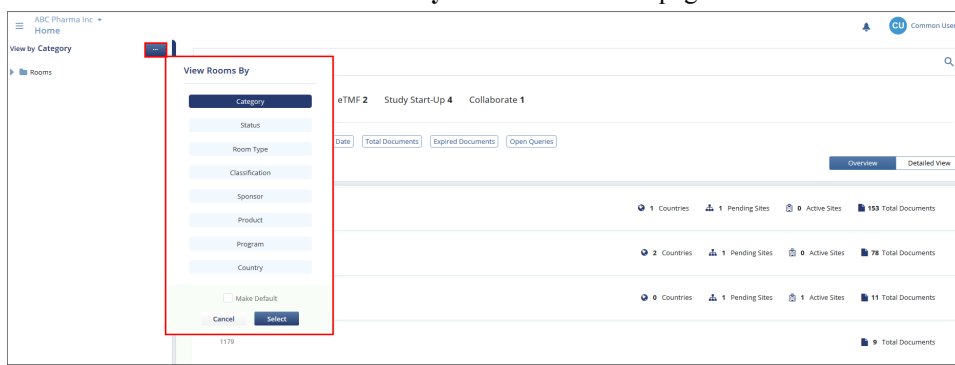
1. View Rooms
2. Search for Studies, Sponsors, and Sites across all rooms
3. Cross Study Document Search
4. Get a Summarized Overview of rooms
5. Get a Detailed View of rooms
6. Filter and Sort Rooms
7. View and Mark favorite rooms

All the above are accessible from the left panel of this help.

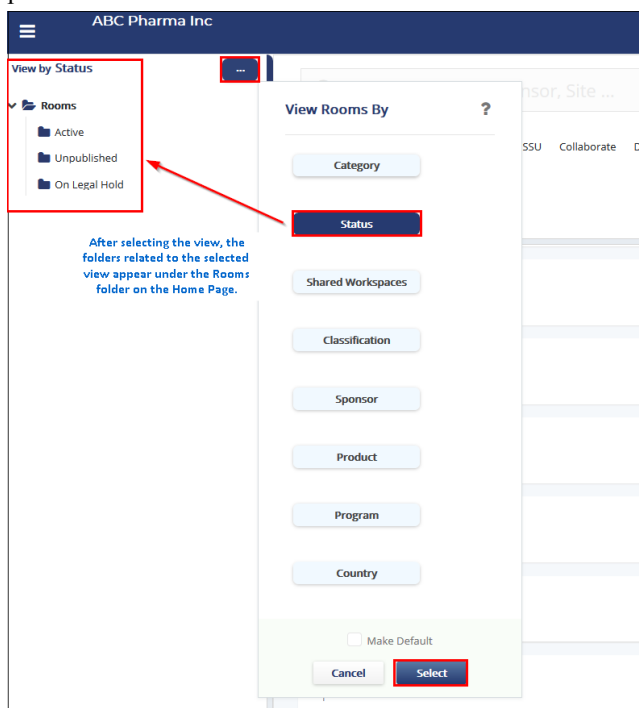
Room Views

TI Home page provides you with the different views through which you can filter rooms.

Click the  icon next to the **View By** from the left of the page as shown in the screenshot below:



Click the required view from the **View Rooms By** popup and then click **Select** to filter and view the rooms on the home page. When you select the **view** from the **View Rooms By** popup, the folders related to the selected view display under the **Rooms** folder in the **View Selector** pane. The screenshot below shows an example for the rooms as per the **Status** View:

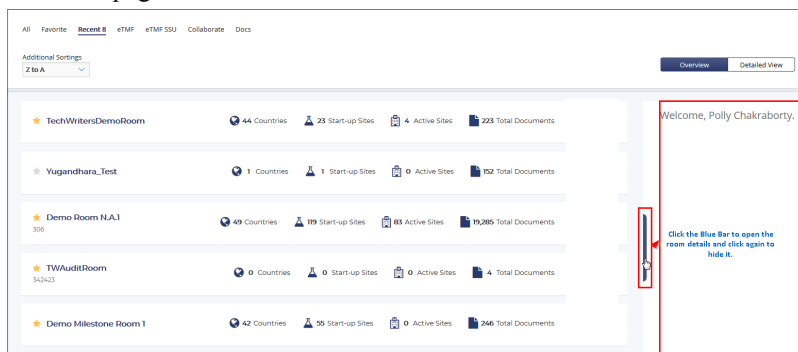


Click the required folder in the Index to view the list of rooms in the **right pane** below the filters. If there is a huge list of rooms in the right pane, you can further apply [TI Home Page Filters and Sortings](#) to view and access the required room.

Alternatively, you can also search rooms by entering a room name in the [Search](#) text box located at the top of the TI Home Page. The results displays below if the search criteria is met.

Viewing Room Details

You can also view the details of the room and the related information by clicking the **Blue Bar** to the extreme right of the home page. Refer to the screenshot below:



Besides TI Home Page, the Room Details can be also viewed from the [User Menu](#) after entering a room.



Note: This panel of Room Details is static and can be viewed irrespective of the view selected of the rooms.

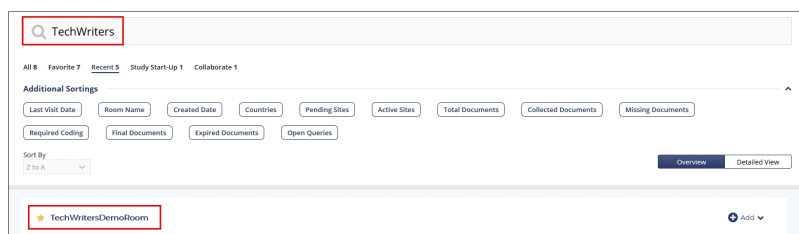
Room Search and Accessing a Trial Interactive Room

Room Search

Trial Interactive allows you to search for rooms easily in cases you have access to hundreds of rooms.

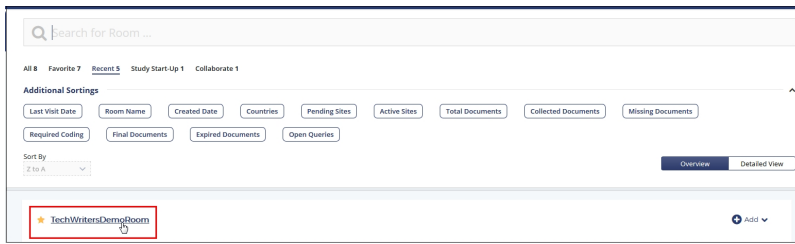
To perform a room search:

1. Enter the required room name in the **Search box** at the top of the page and press **Enter** on your keyboard.
2. Rooms matching the search criteria are displayed in the panel below the filters, else a message **No rooms found** is displayed. Refer to the screenshot below:



Accessing a Trial Interactive Room

Click on the required room name in the panel below the blue line to enter the room. Refer to the screenshot below:




Cross Study Document Search

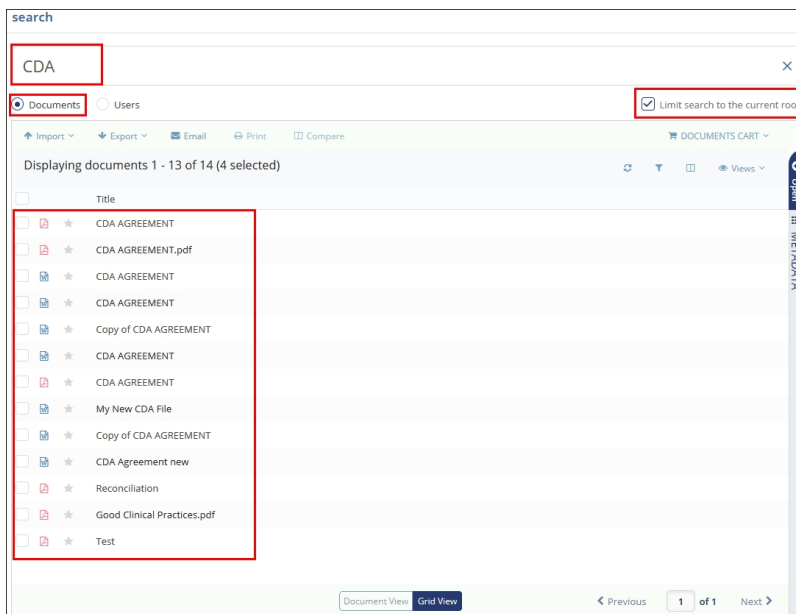
Documents Search

To search for users, follow the steps as below:

1. From the Home Page, or from within a room as appropriate, click the **Search** icon located at the top right corner of the screen.
2. The **Search** window appears which consists of the following sections:
 - a. The **Search** textbox.
 - b. The **Documents** and **Users** radio buttons.
 - c. The **Limit search to the current room** checkbox.
3. Select the **Documents** radio button. The documents grid appears below.

 **Note:** If you select the **Limit search to the current room** checkbox, the search results display corresponding to the current room

4. Enter the **Document Name** in the **Search** field and the corresponding results display in the grid below. Refer to the screenshot below:

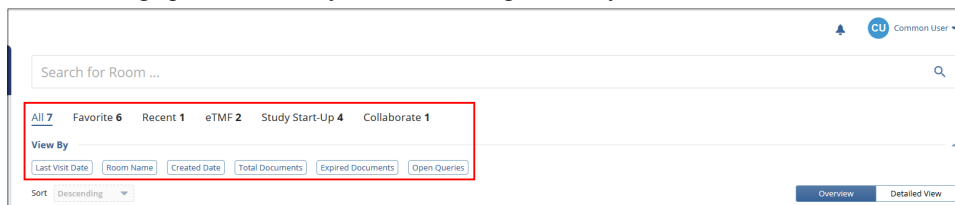


You can perform the following action from the Search Window:

1. Code the document
2. Import and Export the document
3. Email document
4. Compare documents

TI Home Page Filters

TI Home Page provides variety of filters through which you can filter the rooms. Refer to the screenshot below:



The filters consists of the following main filters:

1. **All:** This link displays all rooms that you have access to.
2. **Favorite:** This link displays the list of all rooms that you have marked favorite.
3. **Recent:** This link displays the list of room that have been visited recently with the latest visited room at the top.
4. **Study Start-Up:** This link displays all Study Start-Up rooms.
5. **Collaborate:** This link displays the list of all TI Collaborate rooms.

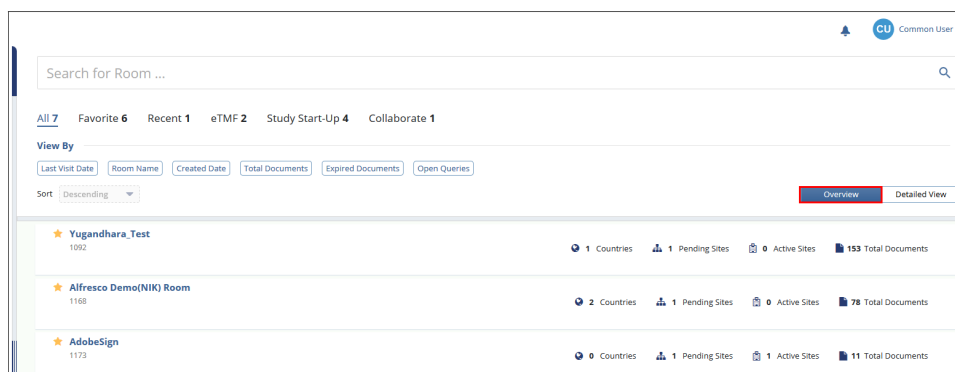
Below these main filters, TI Home Page provides **Additional Sortings** which allows you to sort the room as per the options in the sortings. *These Additional Sortings varies with every main filter.*

Summarized (Overview) View of Rooms

From the Home Page, click the **Overview** button located at the top right corner of the page to get a long-listing of rooms that you have access to with a count of the following metadata:

1. Countries where sites are located
2. Active Sites
3. Pending Sites
4. Total Documents

Refer to the screenshot below:



Countries

The **number** next to **Countries** link shows the **total count** of the countries where clinical trial sites pertaining to a room is located.

Active Sites

The **number** next to **Active Sites** link shows the **total count** of sites that are activated.

Study Start-Up Sites

The **number** next to **Start-Up Sites** link shows the **total count** of sites that are pending for activation.

Total Documents

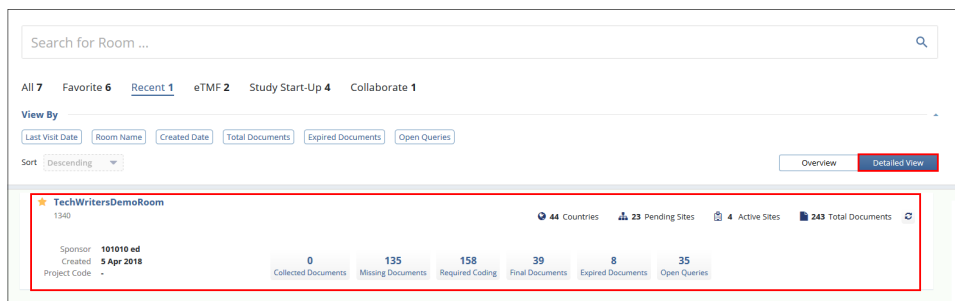
The number next to **Total Documents** link shows the **total count** of documents pertaining to a room.

Detailed View of Rooms

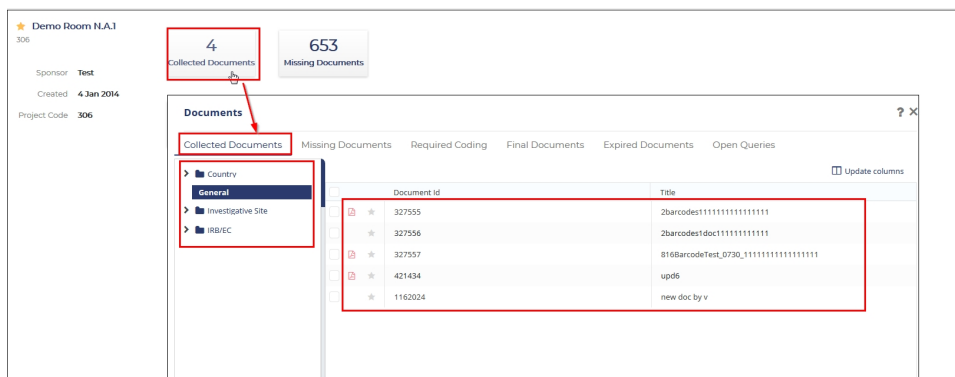
From the Home Page, click the **Detailed** button located at the top right corner of the page to view rooms and studies as large cards with the following information:

1. Open Queries
2. Collected Documents
3. Missing Documents
4. Expired or Expiring Documents
5. Require Coding
6. Quality Control 1
7. Quality Control 2
8. Final Documents
9. Rejected Documents

Refer to the screenshot below:

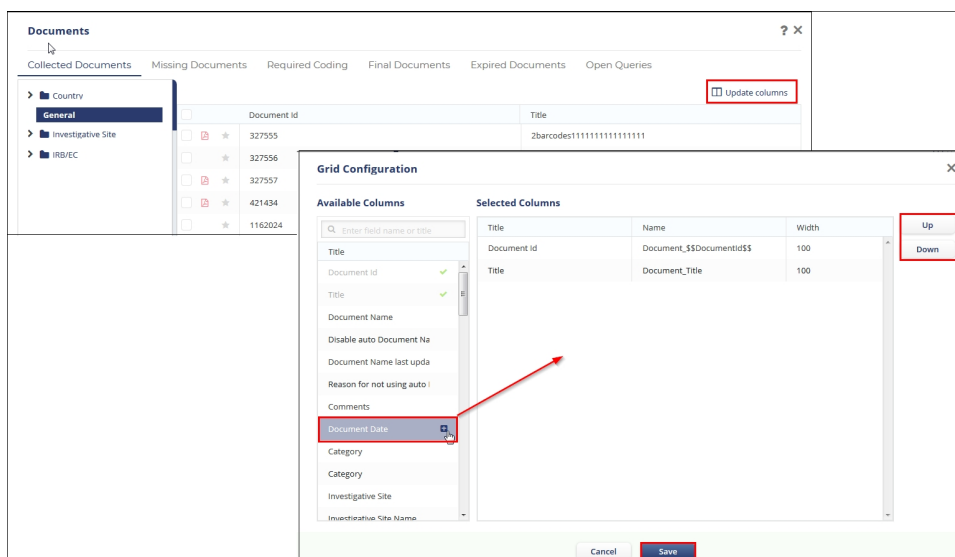


Click the required tab next to the room name. The **Document** window opens which display the list of documents. The screenshot below show an example for the expanded view of the **Collected Documents** tab which displays the list of documents:



You can drill down the folders in the Index on the left to locate the required document.

Besides, you can also configure the columns in the **Document** window as required by clicking the **Update Columns** link at the top right corner of the window. Refer to the screenshot below:



Clicking the **Update Columns** link opens the **Grid Configuration** window which allows you to configure the columns in the document grid. You can add and delete the columns to display for a document in the **Document Grid** as required.

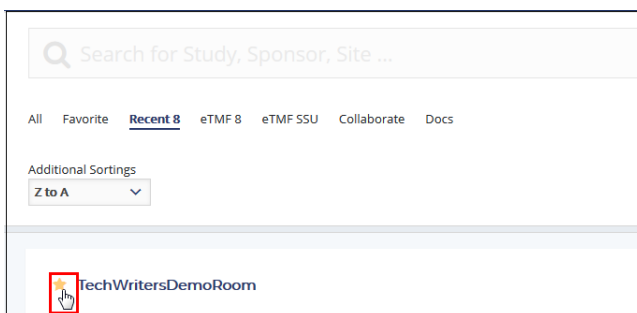
You can also **change the order** of the columns in the Selected Columns section by clicking the **Up** and **Down** buttons located to the right of the Selected Columns.

Similarly, you can view the list of documents for **Missing Documents**, **documents that require coding**, **Final Documents**, **Expired Documents** and **Open Queries**.

Marking Favorite Rooms

Many users are granted access to more than one Trial Interactive room. Users can make particular rooms easier to locate by marking the room or rooms as Favorites. This can be done in two ways.

1. From the Home Page by clicking the star which changes its colour to **golden** on selection to the left of the room name. Refer to the screenshot below:



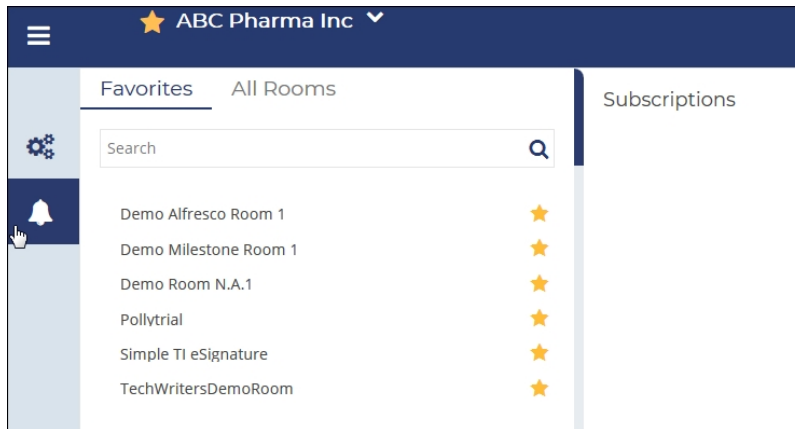
2. On entering a study room, you can add it to **Favorites** by clicking the star at the top left corner of the page where the room name is displayed. The room can easily be removed from the list by clicking the star again. Refer to the screenshot below:



The list of all rooms to which you are assigned is also available through the User Profile.

- a. Navigate to **My Profile Settings** from the User menu.
- b. Select **Notifications** from the menu on the left.

- c. Click the golden star to the right of the room names to mark the selected rooms as **Favorites**.



Main Navigation and Inter-Room Navigation

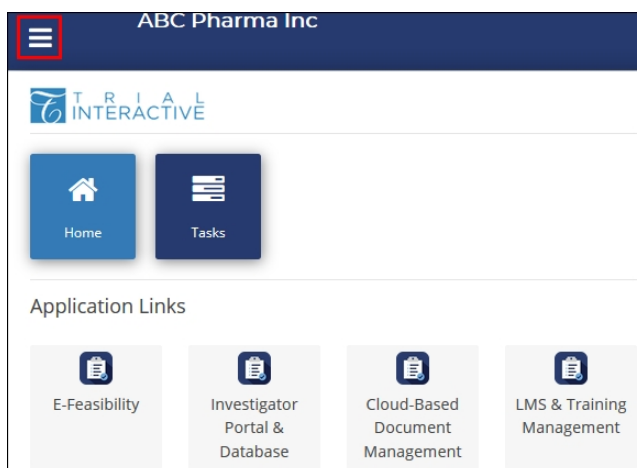
Know how to access applications from within Trial Interactive and navigate between rooms.

From here find more details on the following:

1. Main Navigation from Home Page
2. Main Navigation from Within a Room
3. Navigating between Rooms

Main Navigation from Home Page

Main Navigation from the Home Page can be accessed by clicking the **three lines** located at the top left corner of the page. Refer to the screenshot below:

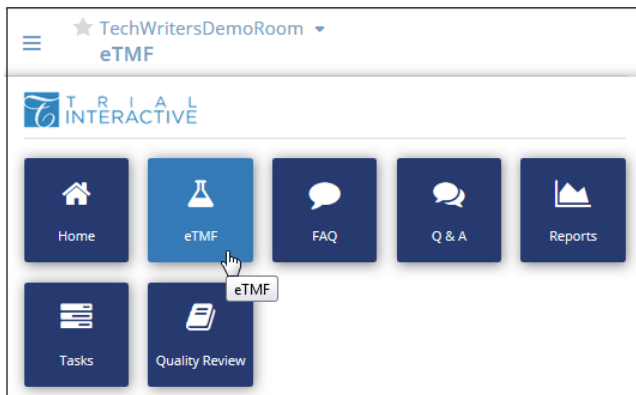


You can access the **Home Page** and **Tasks** application from the Main Navigation. Besides applications, you can also access other **Application Links** from the Main Navigation of the Home Page. These application links takes you to the website of the respective links.

Main Navigation from within a Room

On **entering a room** from the Home Page, you are landed on the **eTMF/Documents** Module.

In a room, as a user of Trial Interactive, you can choose which application to view in a dashboard by clicking the **three lines** located at the extreme top left corner of the page. Refer to the screenshot below:



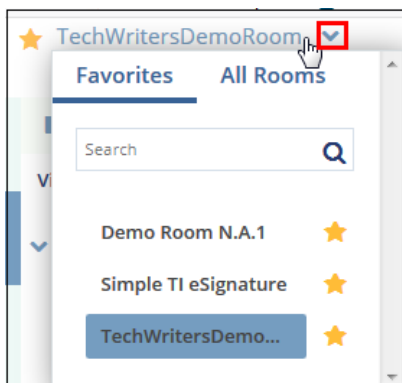
The different modules that can be viewed from a particular Main Module depend on the functionality that can be allowed from the particular Main module. Within Trial Interactive, you can view the following Main Modules:

1. Home
2. Tasks
3. Trial Interactive eTMF and Documents Module
4. Quality Control
5. Start-Up
6. Audit/Quality Review
7. Communications
8. Q&A
9. FAQ
10. Reports
11. TI Collaborate

Navigating between Rooms

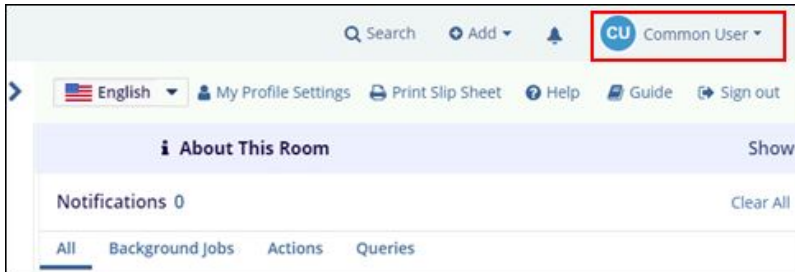
With this version of Trial Interactive, you can now seamlessly change rooms from any location within the application without having to navigate back to the home page. Just click the dropdown next to the room name to open a popup window with the list of all the room names to which you have access to. Refer to the screenshot below:

Click the arrow next to the room name. Select a room from the dropdown list that appears. Refer to the screenshot below:



User Menu

This is the popup you access on clicking the User Avatar.



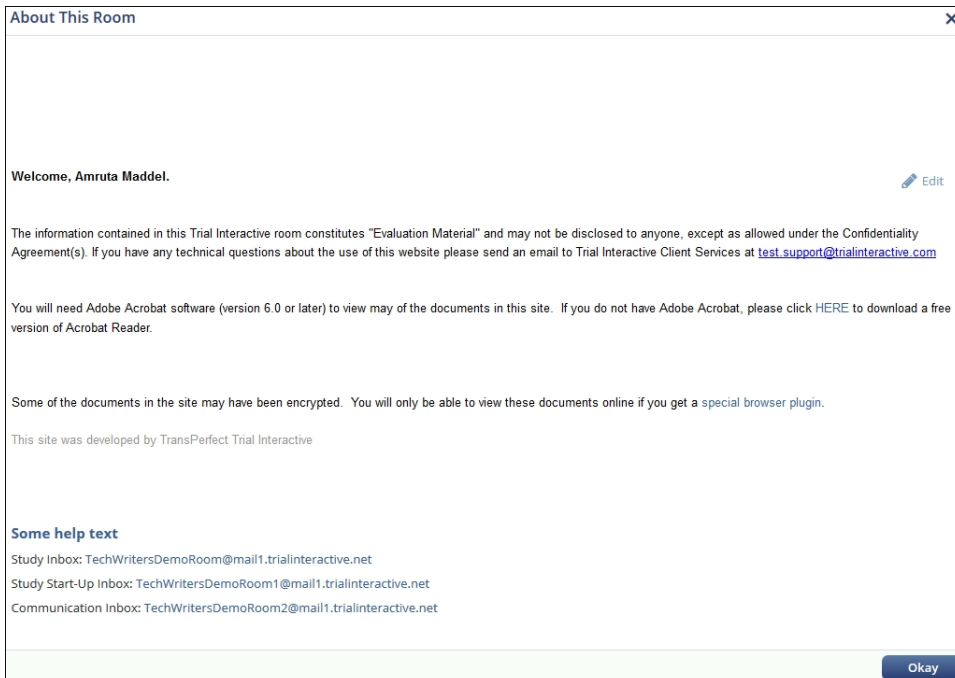
Through the User Menu located at the top right corner you can access the following:

1. My Profile Settings
2. About This Room
3. Language Settings
4. Help (Contact Support)
5. Guide
6. Notifications
7. Logout

Each of these are discussed in separate topics and can be accessed from the left menu of this help topic.

About This Room

Click the **Show** button to reveal the **About This Room** dashlet. This is typically configured by Administrator level users to Welcome new users and provide them with information pertaining to the room. An administrator can also upload any information through the room's Settings that is pertinent to the study that they would like to share with users.



The standard Welcome message offers the following links.

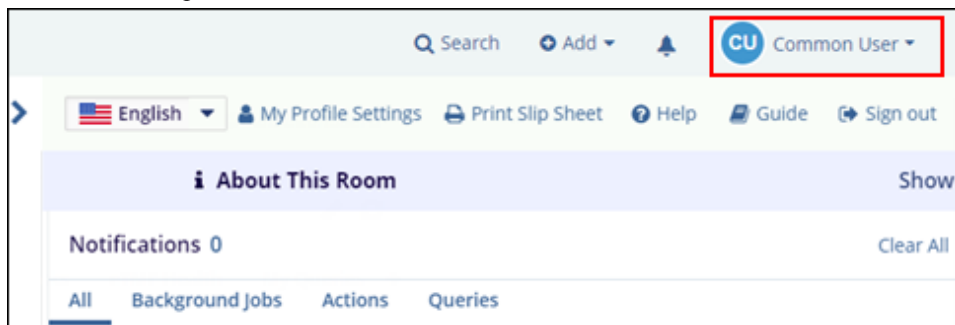
- Link to help desk email. Use this email address when you have technical issues with the Trial Interactive tool.
- Link to Adobe Acrobat download site. You need an up-to-date document viewer to view documents.
- Link to special browser plug-ins so that you can view encrypted documents.
- Click the 'x' to dismiss the popup.

You can click the **Edit** icon at the top right corner of the dashlet to type in new information or edit existing information on the dashlet. After editing the dashlet contents, click **Save** to save the contents and exit, or **Cancel** to exit from the Edit screen.

User Menu - Help

In a scenario where you need any help related to Trial Interactive, you can contact the help desk by clicking the **Help** from the User Menu.

Clicking **Help** opens the **Contact Support** email window to allow you to enter the details for the request needed and send it to the help desk. Refer to the screenshot below:

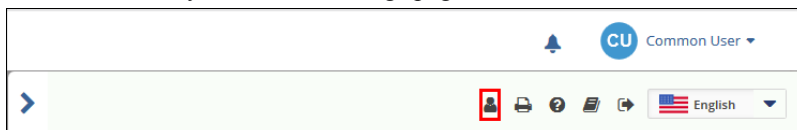


My Profile Settings

From here you can manage your profile and other profile activities.

To access **My Profile Settings**:

1. Click the **Username Dropdown** located at the top right corner
2. From the popup that appears, click the **User Profile** icon.
3. You are taken to your Profile Settings page. Refer to the screenshot below:



The My Profile Settings is divided into the following two sections:

- a. My Profile Main Section
- b. My Profile Notifications Section.

Each of these is discussed in detail in separate topics. Navigate to the left pane to access the required topic.

My Profile Main Section

From the My Profile Settings page, click the Main section from the left panel. Refer to the screenshot below:



From here you can access the following:

Sub-sections with the My Profile Main Section	Purpose
General Information	From this section you can set your time zone, language for your user interface, and the date format preferred by you.
Change Password	From this section you can change your existing password to set a new one.
Password Recovery - Secret Questions	You are required to set the answers to two secret questions to help recover your password if you happen to forget it.
User Avatar	From this section upload a new avatar image for your user profile.
Sites Filtering Options	From this section, you can choose to view only those sites where you are CRA.
Change Email Address	From this section set your contact email address.
Default Context Configuration	From this section, you can set the default landing page when you enter a room.

Each of these are discussed in detail in the sections below:

General Information - Time Zone

To set the time zone applicable to you:

1. Click the **Time zone dropdown** to reveal the popup with the time zones.
2. Scroll up or down to locate your time zone and click the applicable time zone to select it.
3. The selected time zone displays in the box.
4. A popup confirming the same appears. Click the 'x' on the popup to dismiss it.
5. Click **Save**.

Time zone
(UTC+03:00) Minsk

Language
English

Enable custom date input

Date Format*
MM-DD-YYYY

i Date format should contain day ("D", "DD"), month ("M", "MM", "MMM", "MMMM"), year ("YY", "YYYY") and separator ("/", "-", ".")

Cancel Save

General Information - Language

To set your preferred language:

1. Click the **Language dropdown**.
2. Scroll down to locate your preferred language.
3. Click the language to select it.
4. The selected language displays in the box.
5. A popup confirming the same appears. Click 'x' on the popup to dismiss it.
6. Click **Save**.

General Information - Enable Custom Date Input

With the Trial Interactive 10.0 release, while coding a document, in addition to selecting the date from the **Calendar Date Picker**, you can **directly type in dates** in the format preferred by you. The system interprets the date entered by you manually and saves it based on your geo location that it is capable of detecting.

To be able to manually type-in dates, you will need to enable the manual entry of custom dates from this section of your **My Profile**. Refer to the screenshot below:

General Information

Time zone

Language
English

Enable custom date input

Date Format*
DD/MM/YY

i Date format should contain day ("D", "DD"), month ("M", "MM", "MMM", "MMMM"), year ("YY", "YYYY") and separator ("/", "-", ".")

Cancel Save

1. Tick the checkbox **Enable custom date input**.

2. The Date format textbox gets active. Enter the date format as preferred by you. Some of the most common date formats are **MM/DD/YY**, **DD/MM/YY**, **MM/DD/YYYY**, **DD-MMM-YY**.
3. You also have the information text below to help you enter the date format correctly.
4. Once done, **Save** the changes. You will now be able to enter dates manually if you so choose.

Change Password

From this section you can change your existing password to set a new one.

Ⓜ Remember: *Follow the rules displayed under Password Requirements heading while setting the password.*

To set the password:

1. Enter the new password in the **New Password** text field.
2. Re-enter the password in the **Confirm New Password** field.
3. Click **Save** for the new password to be applicable. Refer to the screenshot below:

Change Password

Please change Your password

Password Requirements:

1. Must have at least 8 characters
2. Must contain one uppercase letter and digit OR one special Character
3. Valid special characters are !@#\$%

Current Password*

New Password*

Confirm New Password*

Cancel Save

Password Recovery - Secret Questions

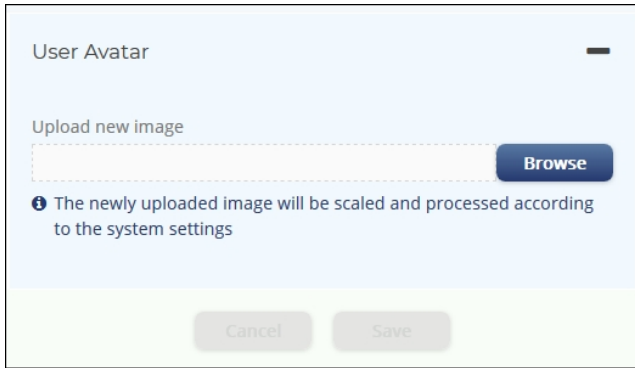
You are required to set the answers to two secret questions to help recover your password if you happen to forget it.

To set the secret questions and their answers:

1. Click the down arrow in the **Question 1** field.
2. Scroll the popup through the list of questions and click on a question of your choice to select it.
3. Enter the answer in the **Answer** field.
4. Repeat steps 2 and 3 to set **Question 2** and its answer.
5. Click **Save**.

User Avatar

Click Browse in the panel to upload a new picture for your login and click **Save**.



User Avatar

Upload new image

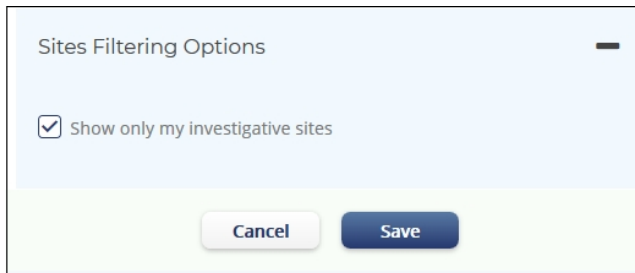
Browse

i The newly uploaded image will be scaled and processed according to the system settings

Cancel **Save**

Sites Filtering Options

You can choose to view only those sites where you are the CRA or only SAS Sites from the Sites sub-module or in the SSU application in Trial Interactive by **ticking this checkbox** and **Saving** the changes. Refer to the screenshot below:

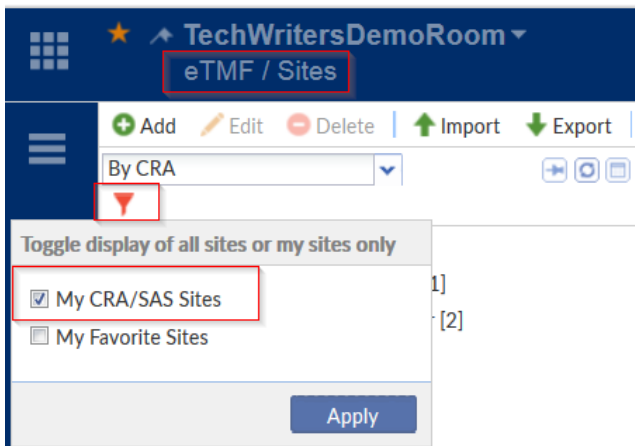


Sites Filtering Options

Show only my investigative sites

Cancel **Save**

On selecting this option, the toggle in the Sites sub-module appears in red color and the option ‘My CRA/SAS Sites’ are ticked by default. Refer to the screenshot below:



TechWritersDemoRoom

eTMF / Sites

+ Add | Edit | Delete | Import | Export

By CRA

▼

Toggle display of all sites or my sites only

My CRA/SAS Sites [1]

My Favorite Sites [2]

Apply

Change Email Address

This will change the email address of the user. Enter your new email address and click **Save**.

You will now be able to send and receive emails to and receive from the newly inserted email id. Refer to the screenshot below:

Note: : If the email id entered matches that of another user or login id then an error message will be displayed and you will not be able to change the email id unless you enter another one that does not match any other user credentials

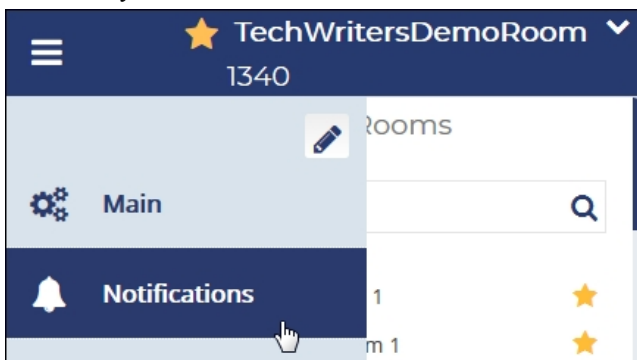
Default Context Configuration

You can choose your preferred landing page once you enter your room by selecting your **Default Context** as shown in the screenshot below:

1. Select the **Default Context** from the **Default Context** dropdown.
2. Select the preferred view from the **Default module** dropdown.
3. Click **Save**.

My Profile Notifications Section

You also have the **Notifications** section that allows you to specify the email notifications that you would like to enable for your account for each of the Trial Rooms to which you have access. Refer to the screenshot below:



Select the desired room from the list of studies in the left pane of the Notifications panel. Using the options grid on the right of the Subscriptions window, you can select which notifications you would like to receive. Administrators can choose alert systems, depending on which notification systems are enabled for you:

- A new audit query response is submitted
- A New Document is added or updated in eTMF, or Start-Up
- A New Question or Answer is added
- A new user registers within a room, or visits a room for the first time
- Workflows
- A new Workflow Query Response is submitted
- A New Document is submitted, approved, or rejected by the Regulatory Reviewer

You can elect to receive either a mini summary of notifications or nightly newsletters recapping all of the new events in the past 24 hours for each of the notification categories.

Once you make your Notifications selections, click **Save** in the lower right corner.

Besides, you can also mark rooms **favorite** from here.

 **Important:**

The availability of the notification option is determined by the client-appointed Administrator in each room. Some notifications may not be enabled and appear greyed out to the user. For example, workflow notifications may not be available to users with Editor access.2019

Language Settings

This allows you to set the language of your choice for your login.

1. Click the **language** dropdown scroll to locate the language of your choice.
2. Click the language to select it to make it the default language for your User Interface. Refer to the screenshot



Notifications

Through **Notifications** panel, located below the **About This Room** dashlet, you can view messages and results of various jobs that you perform in Trial Interactive. This will be discussed through various sections as the need arises.

The right panel of this section displays the following tabs:

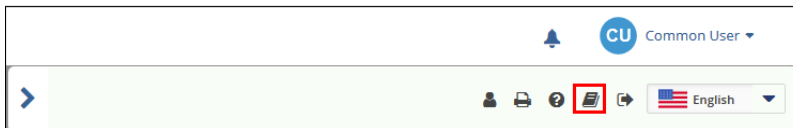
- **Tasks:** Click this tab to get a list of all the tasks that are ongoing, pending, or are overdue. This is a shortcut that provides you an overview of all the tasks in your current room. You no longer need to visit the Tasks module for the details and can access them directly here.

- **Queries:** Click this tab to get a list of all the queries pending for action. You can click any individual query link to lead you to the Queries sub-module for you to initiate your actions on it.
- **Background Jobs:** Through this tab you are notified about a background job that is executing or are completed.
- **Actions:** Click this tab to view messages and results of various jobs that you perform in your Trial Interactive room. Some messages like downloading/mass coding documents provide the **Get Job Result** button that you click to get further details on the action like a message or a downloadable zip.

The left panel of this section displays the **Courses** that you are required to complete and those that you have completed and certified for.

Guide

Click the **Book** icon from the User Menu to open the help. The Reader Help opens in the new tab of the browser. Refer to the screenshot below:



Signout

Click **Sign out** to end your current session to come out of the application.

Index

A

About this help [7](#)
About This Room [26](#)
Adobe Reader [10](#)
Alert systems [32](#)

B

Browser [10](#)
Browser Support [10](#)

C

Change Email [27](#)
Change Password [27](#)
Chrome [10](#)
Client Software [10](#)
Countries [21](#)
Custom Date Input [27](#)

D

Default Context Configuration [27](#)

E

Email [27](#)

F

Firefox [10](#)

I

Inter-Room Navigation [24](#)
Internet Explorer [10](#)
Intra-Room Navigation [25](#)

L

Language [27](#)
List of Job Aids [9](#)
List of Videos [9](#)
Login with Google Authenticator [13](#)
Login with Multif-Factor Authenticator [13](#)
Long Listing [21](#)

M

Mac Users [10](#)
Main Navigation [24](#)
Marking Rooms Favorite [23](#)
Multiple Sessions [10](#)
My Profile [27](#)
My Profile Notifications [32](#)

N

Navigation [24](#), [25](#)
Newsletters [32](#)
Notifications [32](#)

O

Overview [21](#)

P

Password [16](#)
Password Recovery [27](#)
Password Reset [16](#), [27](#)
Profile Settings [27](#)

R

Room Search [19](#)

S

SAS Datasets [10](#)
Secret Questions [27](#)
Sites Filtering Option [27](#)
Subscriptions [32](#)
Subsequent Logins [16](#)

T

Time zone [27](#)

U

User Avatar [27](#)
User Registration [12](#)