# TREACTIVE How to Customize the Dashboard TI v 10.4 APPLICABLE TO: • Administrators • Room Managers • Editors • Study Start-Up

Readers

	Trial Interactive  Home Training Team eTMF Room Room Id 509	
l		
	Sponsor <b>TI eSignature</b> Created <b>30 Jan 2020</b> Last Visit <b>3 Nov 2022</b> Project Code -	

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

Collaborate

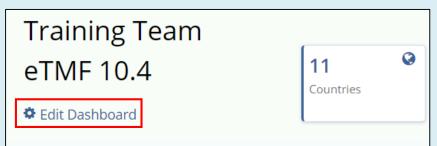
2. Navigate to either the eTMF, SSU, or QC Review Module depending on which dashboard you want to customize.



Some dashboards may not be accessible to you depending on user configuration.



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



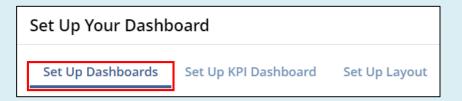


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### Setting up your individual Dashboards:

4. Click Setup Dashboards to start editing dashlets.



- 5. Click the box next to a dashlet to show or hide it.
- + Add 🛍 Remove Users can expand groupings to see Common the list of included dashlets, by clicking About this Room on the small arrow next to one. Bulletin Board Proiect Links My Courses My Tasks Documents Mv Favorite Documents Popular Documents Approved Submissions Submitted Documents **Documents View Bv Workflow Status**



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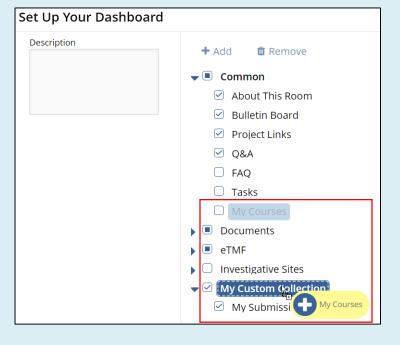
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## 6. Users can create custom groupings of dashlets by clicking the **Add** button;

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

Set Up Your Dashboard						
Set Up Dashboards Set Up KPI Dashboard Set Up Layout						
Title My Custom Collection	Search					
Description	<ul> <li>Add  Remove</li> <li>Common</li> <li>Documents</li> <li>eTMF</li> <li>Investigative Sites</li> </ul>					
	<ul> <li>My Custom Collection</li> <li>No tabs selected</li> </ul>					

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



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





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#### **Customizing the KPI Dashboard:**

TRANSPERFECT

7. Users can customize which KPI indicators show at the topright of their eTMF Dashboard, in a manner similar to editing dashlets.

First, switch to the tab named KPI Dashboard.

Set Up Your Dashboard	Search					
Set Up Dashboards Set Up KPI Dashboard Set Up Layout	KPI Dashboard					
8. Check/uncheck the boxes to activate or remove squares from the KPI area in the Dashboard. Then click <b>Save</b> .	<ul> <li>Total Documents</li> <li>Countries</li> <li>Pending Sites</li> <li>Active Sites</li> <li>Collected Documents</li> <li>Missing Documents</li> <li>Final Documents</li> <li>Expired Documents</li> </ul>					
	Expiring Documents     Cancel Save					
9. Changes are applied immediately. See screenshot below where <b>Countries</b> and <b>Pending Sites</b> have been hidden.						
Training Team eTMF 10.4 Edit Dashboard     Igr1 7 Active Sites	Initial Collected Documents     Initial Documents     Initial Documents					
Administrators can create or edit default setups for dashboards, separate for each user level.						

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#### Changing the Dashboard layout:

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



Note: Some screens may be too small for the threecolumn layout.

Setup Your Dashboard		×
Setup Dashboards Setup Layout		
One column	Two columns	Three columns
		Your screen is probably too narrow for this layout
	Cancel Save	

11. Click Save to make your changes effective.



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