How to Customize the Grid

CTMS version 3.1

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APPLICABLE TO:

- ● Company Admin
- ● Study Manager
- ● CRA

1 Click on the three-dot menu in any column header. If the three-dot menu is not present, the grid view cannot be customized.
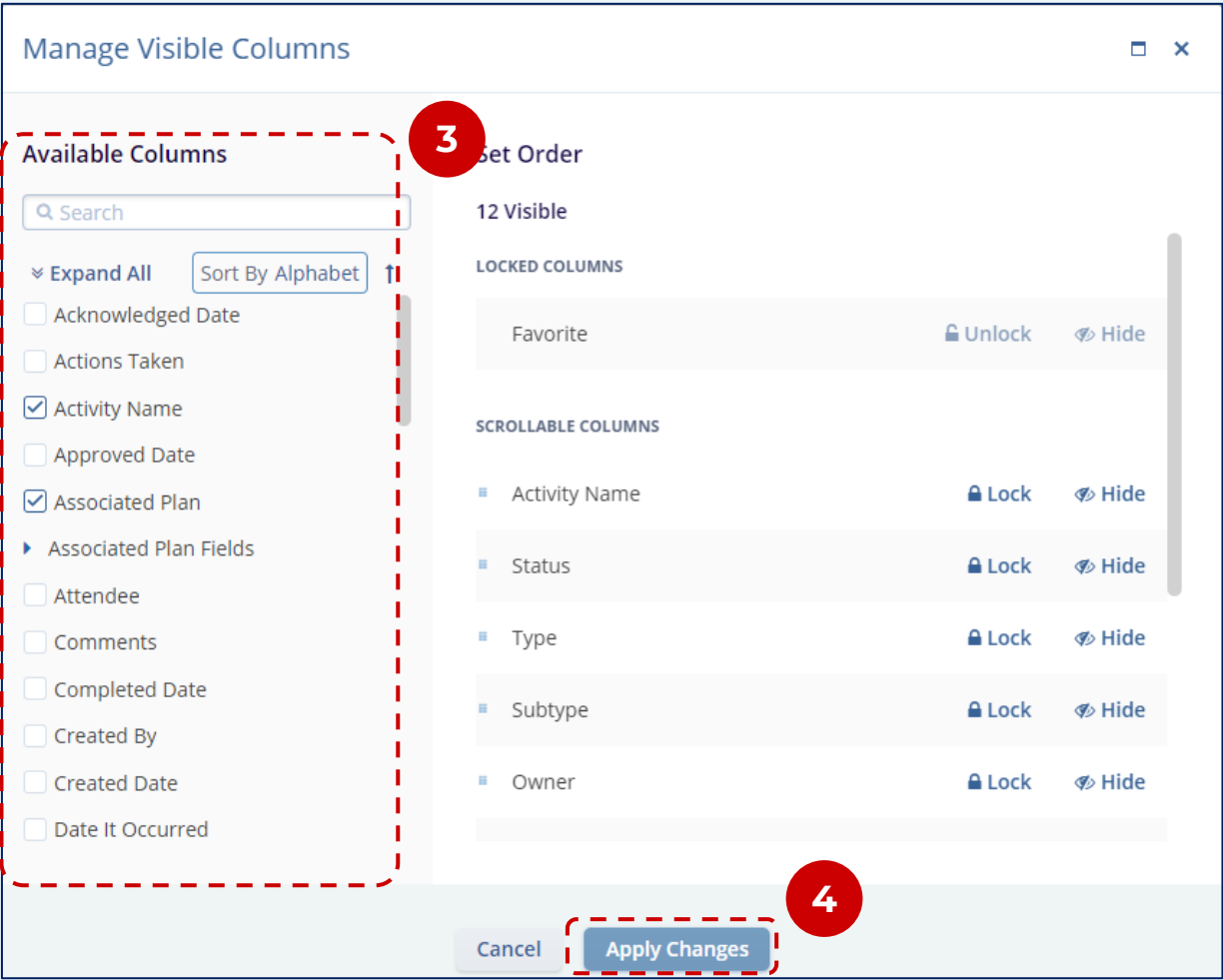
2 Select 'Manage Visible Columns' from the list of options displayed.

Status		Type	
OPEN		↑ Sort Ascending	
OPEN		↓ Sort Descending	
OPEN		⊘ Hide Column	
		🔒 Lock	
OPEN		▦ Manage Visible Columns	
		Submission	
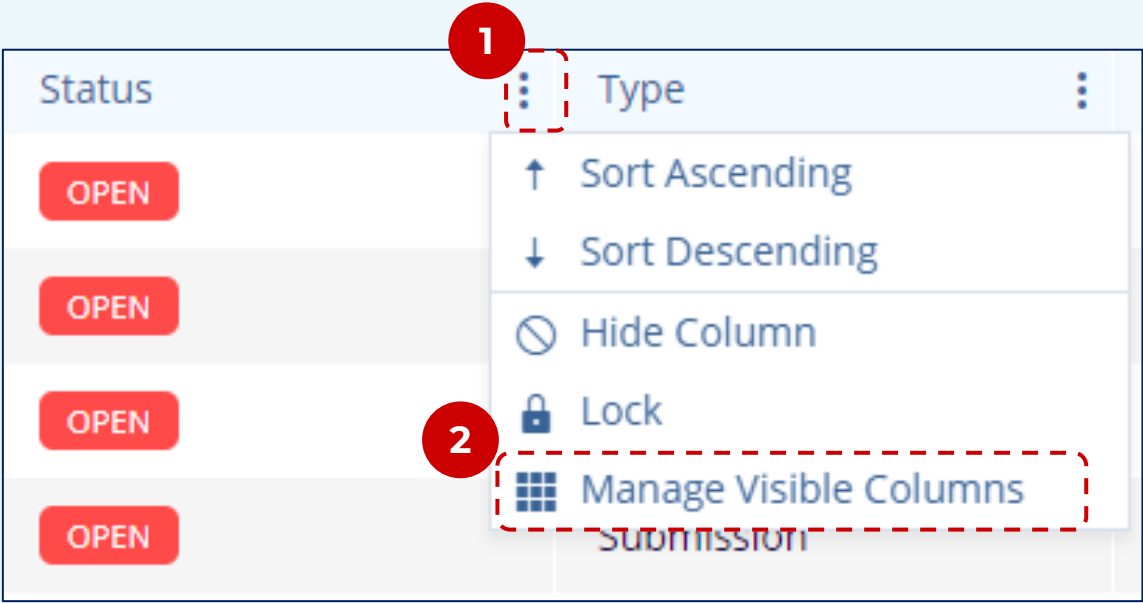
3 Choose from the list of available columns by checking the related box.

4 Press **Apply Changes.**

5 The column(s) will display in the grid and may be dragged into any order.

Manage Visible Columns ▢ ✕

Available Columns | Set Order

🔍 Search

12 Visible

LOCKED COLUMNS

⌄ Expand All | Sort By Alphabet ↑↓

| Favorite | 🔓 Unlock | ⌗ Hide |

☐ Acknowledged Date
☐ Actions Taken
☑ Activity Name
☐ Approved Date
☑ Associated Plan
▸ Associated Plan Fields
☐ Attendee
☐ Comments
☐ Completed Date
☐ Created By
☐ Created Date
☐ Date It Occurred

SCROLLABLE COLUMNS

Activity Name	🔒 Lock	⌗ Hide
Status	🔒 Lock	⌗ Hide
Type	🔒 Lock	⌗ Hide
Subtype	🔒 Lock	⌗ Hide
Owner	🔒 Lock	⌗ Hide

Cancel | **Apply Changes**

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6 Once you have made changes to the grid, you will need to save them prior to attempting any export of the data shown. Click the **View Options** menu.
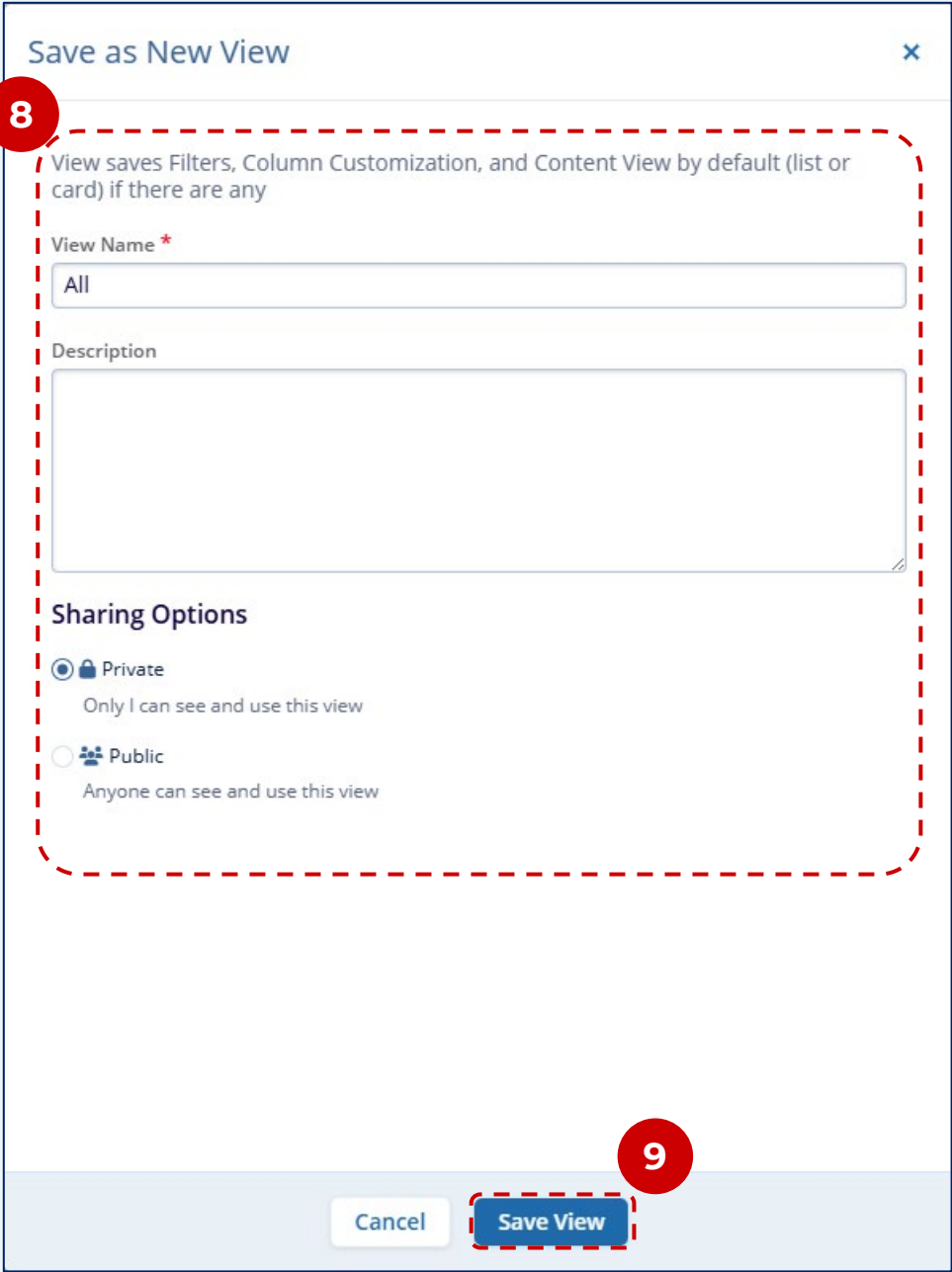
The warning message shown here will be displayed if you attempt to export the data displayed prior to saving your changes.

6 View Options ^

ℹ️ View **All** has Unsaved Changes

🔄 Save Changes

7 ✅ Save as New View

↺ Discard Changes

View's Actions

✕ Close View

ℹ️ View Details

🔗 Copy link to View

⭐ Add to Favorites

All Views' Actions

⚙️ Manage Views

↺ Reset to Default Views Config

Export ✕

⚠️ This view contains unsaved changes

The selected view (columns and order) has not been saved. To export the data as displayed you must save the view.

Do you want to Export?

Cancel   **Export**

7 Select the **Save as New View** option.
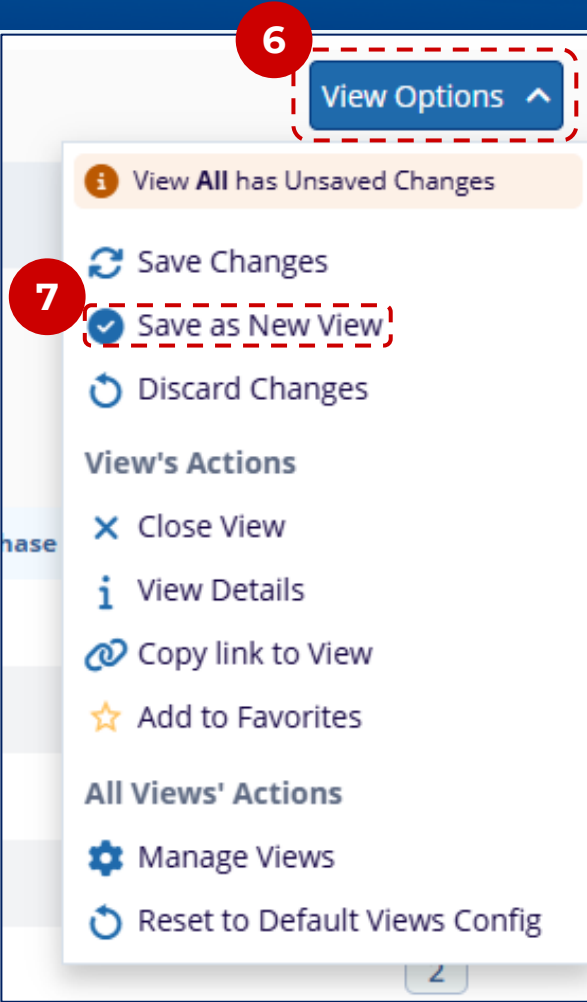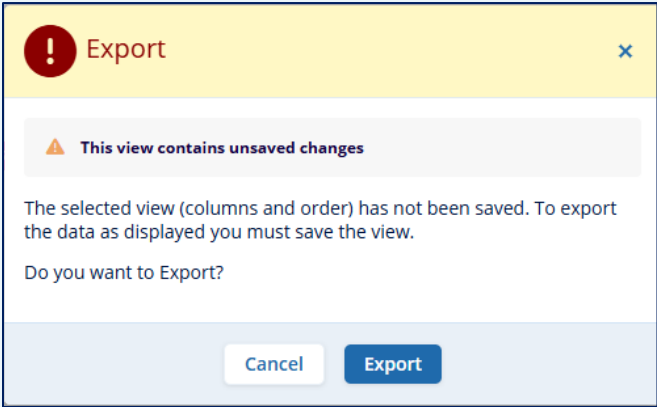
8 Provide a name for the new view, describe the view if desired and indicate whether the view should be private or public.

9 Press **Save View.**

Save as New View ✕

8 View saves Filters, Column Customization, and Content View by default (list or card) if there are any

View Name *

All

Description

Sharing Options

🔘 🔒 Private
Only I can see and use this view

⚪ 👥 Public
Anyone can see and use this view

9 Cancel   **Save View**

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10 The new view will appear in the menu bar at the top of the screen. You can toggle between views by selecting the view from the menu.

Studies

10 New View   All   **11** +

⊕ Add   ✏ Edit   ⬆ Export

11 Clicking on the **+** symbol allows you to search for public views and add them to your list of views. This is particularly useful for a team which has to report on the same set of data regularly.

Setting up specific views can be especially useful as they allow users to quickly and easily switch between different sets of data for monitoring or reporting purposes.

Shared views allow teams to ensure that they are all looking at the same set of information.