

How to Personalize the Document Grid

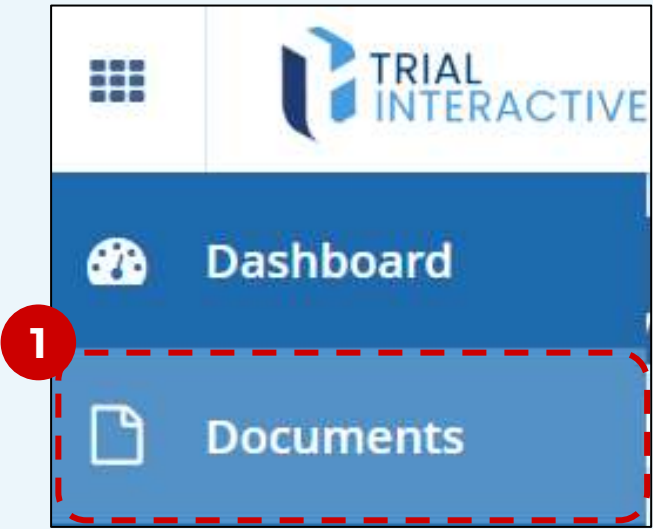
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APPLICABLE TO:

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

Documents lists in TI can display different information in the columns/cards next to each document. Here's how:

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

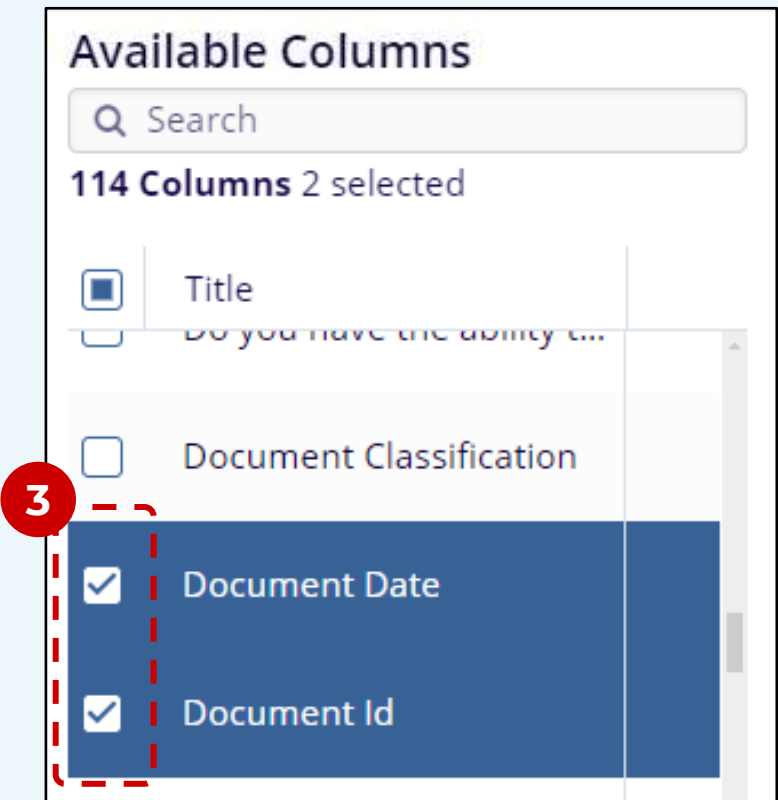


2 In the grid heading, locate and click the **Manage Columns** button.



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

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



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

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

	Title	Name	Width
☒	Submitted Name	Title	100
☐	Document Issue	\$\$DocumentIssues\$\$	100
☐	Document Id	\$\$DocumentId\$\$	100
☐	Document Date	Document Date	100

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

Cancel Set View Save Changes

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

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

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

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

Save View

Name Enter View Name
Name is required

Make Default for Me

Make default for All

Save As New

Cancel Save

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

