TRIAL INTERACTIVE

TI eFEASIBILITY v2.6 - MANAGER USER GUIDE

Version 1.0

TRANSPERFECT LIFE SCIENCES

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VERSION HISTORY

Author	Revision	Date	Change History
Sneha Jagavkar	1.0	20-Jul-2023	Initial version Finalized

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1. About Trial Interactive

TransPerfect customers have used TransPerfect's Trial Interactive successfully for over 10 years in hundreds of Clinical Trials for the storage of critical trial documents as part of the Electronic Trial Master File. Trial Interactive's Platform is a web-based and mobile-enabled software-as-a-service (SaaS) application that provides eClinical solutions for eTMF as well as E-Feasibility, Content Management, Learning Management, Study Start Up, Clinical Trial Management, and a variety of other tools used in the conduct of a Clinical Trial. The Trial Interactive Platform has the following features:

- An electronic Trial Master File archive that meets all regulatory, security, access and storage requirements in all countries and regions.
- A fully hosted solution that is 21 CFR Part 11, Annex 11, ERES, GDPR, HIPAA, and GxP compliant.
- A single access point for all trial content and documentation for both sponsor and site personnel.
- Support of a series of TMF workflows including document import and coding, quality review, audit and inspection, document certification, and the capture of other Clinical Trial documentation.
- A thin-client, consumer-grade user interface that supports most major browsers as well as a mobile app that supports both iOS and Android phones and tablets.
- A flexible, configurable document management solution for Clinical, Quality, and Regulatory documentation that supports a series of review and authoring solutions.
- A Site Identification, E-Feasibility, and Study Start Up product suite.
- A full-featured eLearning system designed specifically for GxP compliance.

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2. About TI E-Feasibility

Electronic Feasibility (E-Feasibility) is a system intended to create, maintain, retrieve and distribute feasibility questionnaire records related to clinical studies.

E-Feasibility enables Sponsors and CROs to evaluate the possibility of conducting a particular clinical program/trial in a particular geographical region in a certain site. CROs/Sponsors can perform operations (add, choose) from the existing database of investigators/sites on the platform and build questionnaires/surveys to be sent out to prospective investigators.

E-Feasibility provides end-to-end solutions to the Clinical Managers with integration to Trial Interactive eTMF module.

3. About This Guide

This user guide will assist users with Manager access in understanding and using the TransPerfect Trial Interactive Electronic Feasibility (E-Feasibility) 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 guide contains a descriptive overview of the Trial Interactive E-Feasibility tool and step-by-step procedures of the Trial Interactive E-Feasibility functions.

This guide is intended solely for the use of clients who have purchased the Trial Interactive platform. This guide and its contents are the intellectual property of TransPerfect Trial Interactive and are not to be distributed without the expressed consent of TransPerfect Trial Interactive.

4. Getting Started

Find the below sections to get started with Trial Interactive E-Feasibility:

- System Requirements
- Launching the Web Application
- Logging In
- Forgot Password
- Logout/Sign Off

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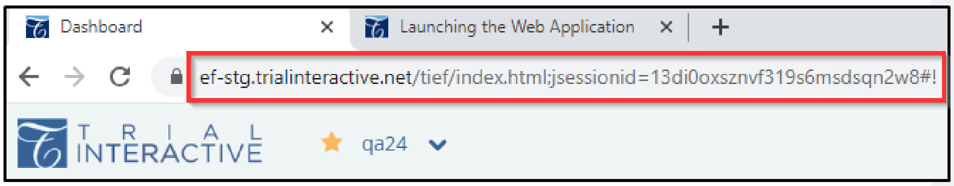
4.1 System Requirements

Electronic Feasibility (E-Feasibility) is fully functional in standard browsers -- Internet Explorer 10, Internet Explorer 11, Chrome, Firefox, Opera, and Safari, and recommends Chrome for PC users and Firefox for Mac users. E-Feasibility requires Adobe 7.0 or higher. It is also fully functional in the Windows Operating System.

E-Feasibility restricts the usage of versions of Internet Explorer with version number less than 10 and also on Windows operating system with versions of Windows XP and earlier.

4.2 Launching the Web Application

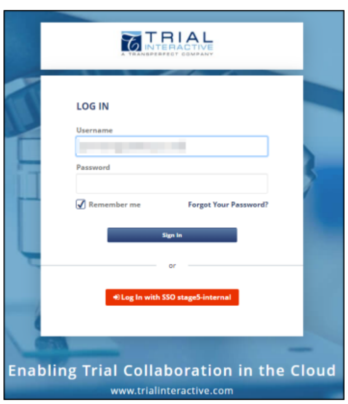
To login to e-Feasibility use your **preferred internet browser** and navigate to the E-Feasibility application.



4.3 Logging In

Follow the steps below to login the E-Feasibility application.

1. Navigate to the E-Feasibility link.
2. Enter your **Trial Interactive Login** credentials. The **Username** is a full email address of the user.
3. Click **Login**.



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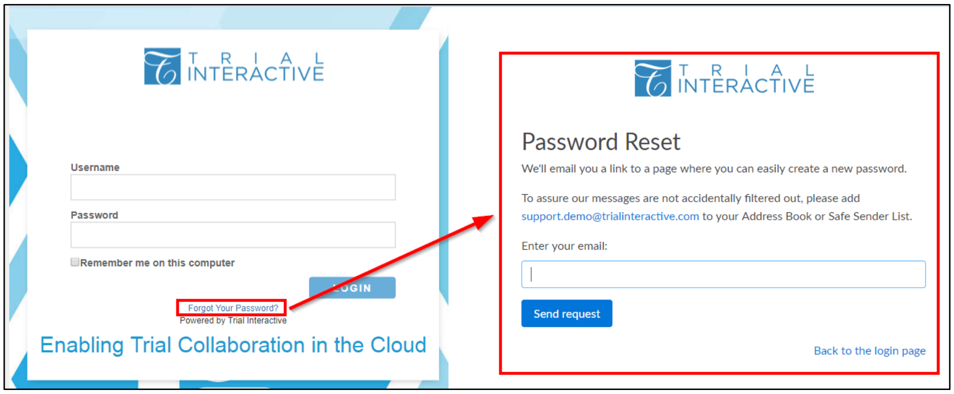
4.4 Forgot Password

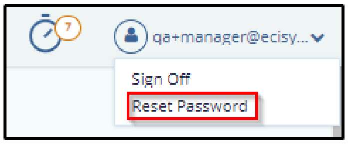
To retrieve a forgotten password, click at the forgot Your Password? Link. The user is redirected to the Password Reset page. Refer to the screenshot below.

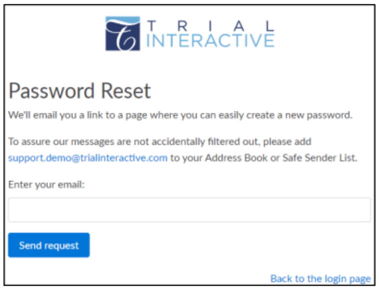
Note: The users need not contact the Help Desk. In most cases, the user can perform the Password Reset operations without any outside help.



Follow the steps below to reset the password:

1. Enter your email address in the field provided.
2. Click Send Request. The link for Password Reset is sent to your registered email address.
3. Open the link and follow further instructions to reset the password.





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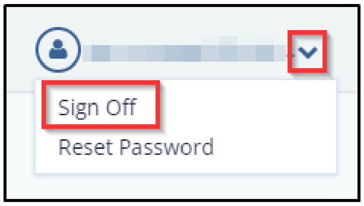
4.5 Logout

To log out from E-Feasibility, follow the steps mentioned below:

1. From the E-Feasibility Dashboard, click the **User Account** dropdown in the top right corner.
2. Click **Sign Off**. Refer to the screenshot below.



5. System and Process Overview

E-Feasibility defines the following components:

Component	Description
Projects	A project in an E-Feasibility a space assigned to the client in TI instance. To create a project, users have to create a room in multi-tenant eTMF application.
User Roles	E-Feasibility defines below mentioned roles for the users in a project: • Administrator: Administrator has access to all functionalities and projects, including user permission management. • Manager: Manager has access to all the functionalities within a project • Editor: Editor has the ability to create and edit forms in a project. • Publisher: Submitter is a registered user contact with the ability to complete a survey within a system. • Submitter: Publisher has the ability to send and review responses for created forms.
Categories	Categories in E-Feasibility are used to segregate questions and forms with particular shared characteristics under specific groups. E-Feasibility defines following Categories: • Question Category • Form Types
Questions	Every form in a project consists of questions, which allows the user to conduct a survey for clinical research.

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Sections in Survey	Sections in a Survey divide questions into distinct parts. For example, in a Site Selection Questionnaire, below sections can be provided: • Protocol • Prior Information • Staff and Site Profile
Response	Response is the answer to questions sent back by the Submitter or participants of the survey to the Publisher.
Settings	Settings are basic configurations required to create, publish and complete Surveys in a project.
Reports	Reports are used to display activities of the user in a project.
CDA	CDA is the Confidentiality Disclosure Agreement that the Sponsor/CRO and the Submitter agree upon and sign for Site feasibility.

6. The E-Feasibility Process in TI

The process of E-Feasibility in TI involves the following:

1. Configuring Settings
2. Creating categories for forms and questions
3. Creating Forms for surveys – new forms, cloning from existing forms
4. Creating Sections and Questions in forms
5. Publishing forms
6. CDA
7. Sending Forms and Approving the CDA
8. Viewing and handling Form responses
9. Creating Reports

7. The E-Feasibility Dashboard

Logging in to E-Feasibility opens the dashboard which gives you a complete overview of an opened project.

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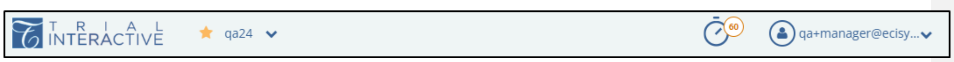
Every E-feasibility Dashboard is broadly divided into:

1. Title Bar
2. Dashlets
3. Toggling Menu Bar

7.1 Title Bar

The Title Bar consists of the following:

1. Logo
2. Project Dropdown
3. Background Jobs
4. User Account



7.1.1 The Logo

This appears on the upper left corner of a dashboard. Click the Trial Interactive Logo on the title bar to open the dashboard of the current project if you are not on the dashboard.

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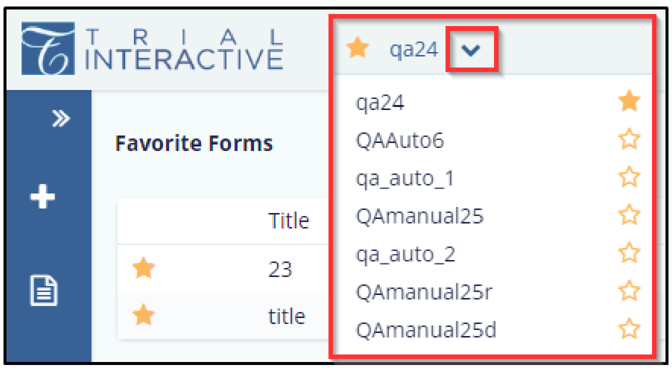
7.1.2 The Project Dropdown

This appears as a dropdown. It displays the list of projects, which are assigned to you, and allows you to switch between projects, if you are assigned to multiple projects. It also allows you to mark a project as favorite by clicking the star ☆ next to the project name which then changes its color to grey ★ .

Note: By default, the E-Feasibility Dashboard displays the favorite project. If none of the project is favorite, the dashboard displays the first project from the list.

To switch a project:

1. From the Title Bar, click the Project dropdown.
2. Click the required project to switch. Refer to the screenshot below.



7.1.3 Background Jobs

Background jobs appear as a clock with a counter  on the Title Bar, which allows the user to view summary of all executed jobs, which the user has initiated. User can see only his/her job task.

Background Jobs display the jobs for the following:

1. Import Survey: This displays the summary of the survey that is imported through a source file from the system.
2. Export CDA: This displays the summary of CDA that is exported.
3. **Edit Surveys by Importing:** This displays only when the forms are imported.
4. **Send Form Emails:** For each above-mentioned job, the background jobs display the progress/status of the Import/Export, along with the Start date, Completed date, Total number of files imported/exported, Number of failed imports/exports, Number of Successful imports/exports and Close button to dismiss the popup window.

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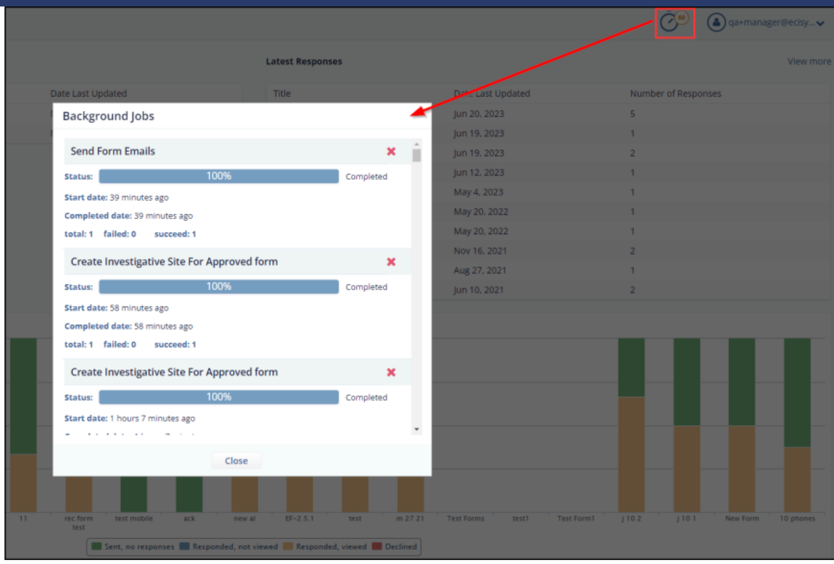
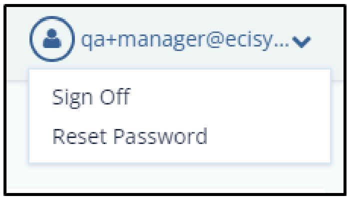


Note: All roles other than Submitter have at least one job task in background jobs.

7.1.4 User Account

This appears as a dropdown with the name of the user logged in. It allows you to reset your password or to logout of the application.



Reset Password

Follow the steps below to reset the password:

1. Click Reset Password from the dropdown.
2. Proceed to section Forgot Password for further procedure.

7.2 Dashlets

The E-Feasibility dashboard is divided into the following dashlets:

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1. Favorite Forms
2. Latest Responses
3. View More Link
4. Progress of Top 20 most Active Forms

7.2.1 Favorite Forms

The table under Favorite Forms dashlet summarizes a list of favorite forms in the project. Each favorite form is designated with a star icon to the left of the Form Title. You can also remove a Form from the favorite list by clicking a star and making it un-favorite.

Click a row in the table to open the form.

Favorite Forms

	Title	Date Last Updated
★	23	Mar 29, 2021
★	title	Mar 24, 2021

7.2.2 Latest Responses

The table under Latest Responses summarizes a list of forms that have received the latest responses. This table displays the columns with Title, Date of Last Update and Number of Responses. Click a row of the required form to open it. Refer to the screenshot below.

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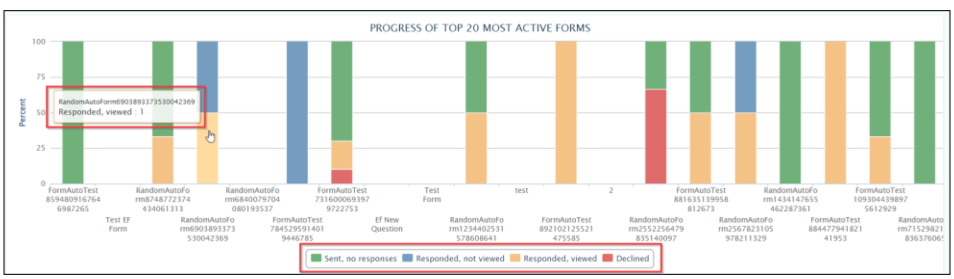
Latest Responses View more

Title	Date Last Updated	Number of Responses
Type002	Jun 20, 2023	5
monitoring test123	Jun 19, 2023	1
hh	Jun 19, 2023	2
11	Jun 12, 2023	1
rec form test	May 4, 2023	1
new al	May 20, 2022	1
EF-2.5.1	May 20, 2022	1
test	Nov 16, 2021	2
m 27 21	Aug 27, 2021	1
j 10 2	Jun 10, 2021	2

7.2.3 Progress of Top 20 Most Active Forms

The graph displays the 20 most active forms in a project. Different colors used in a graph represent the type of response for each form. Hover the mouse over a bar to view the count of each response type and to open the form.



7.2.4 View More Link

The View More link in the top right corner of the Latest Responses dashlet opens the Forms Dashboard, which displays the table of Forms. You can also land on this page by clicking Forms from the Toggling on the left of the dashboard. Refer to the screenshots below.

Latest Responses View more

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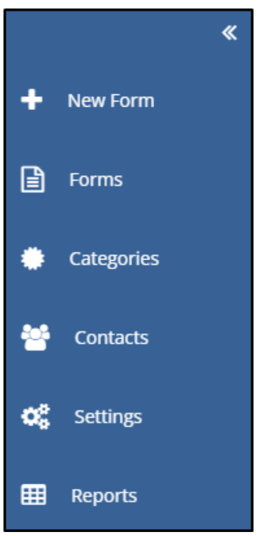
7.3 Toggling Menu Bar

The Toggling Menu Bar on the left of the dashboard allows you to access several functionalities. The functionalities appearing here are based on the accessibility level of the user. Click the double arrow « to expand or collapse the Toggling Menu Bar. Click each marked area for further details of the functionality.



8. Settings

E-Feasibility requires basic settings to be configured to perform actions on a Form.

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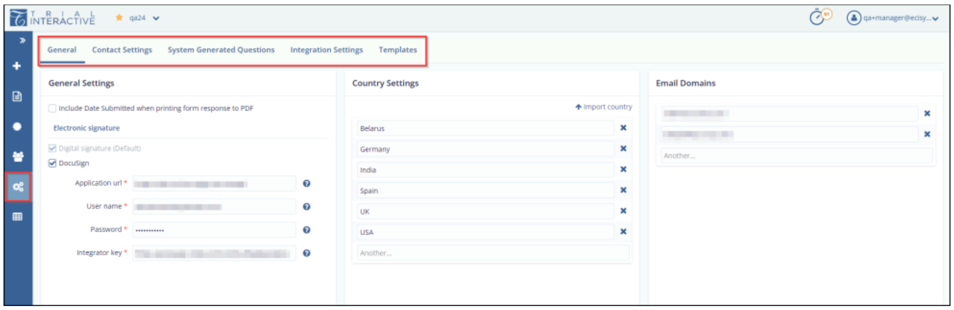
Click Settings from the Toggling Menu Bar to configure the global project settings. The Settings menu contains the following tabs:

1. **General** (highlighted by default)
2. Contact Settings
3. System Generated Questions
4. Integration Settings
5. Templates

Refer to the screenshot below.



8.1 General Tab

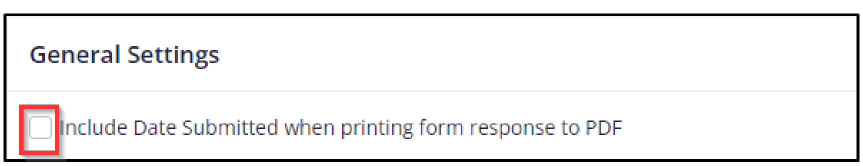
The General tab contains the following settings:

1. General Settings
2. Country Settings
3. Email Domains

8.1.1 General Settings

This tab contains the checkboxes for the following:

1. Include Date Submitted when printing form response to PDF: Selecting this checkbox displays the current date of a Survey response on a form that is downloaded/printed in PDF.



Electronic Signature Panel

1. Digital Signature (checked by default): This is default signature process that is used to sign the CDA.

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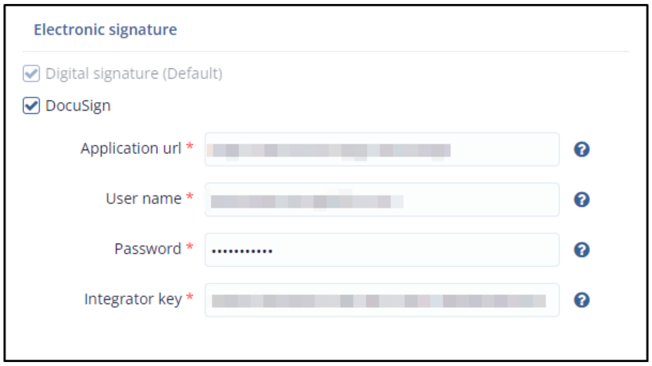
2. DocuSign: Selecting this checkbox displays the DocuSign eSignature panel to allow you to enter the following configuration details to activate the feature:

- Application URL: Application URL for the DocuSign account.
- Username: Username for the DocuSign account.
- Password: Password for the DocuSign account.
- Integrator Key: DocuSign Integrator Key of the account.

3. The Cancel and Save buttons (visible only when the DocuSign fields are entered). Refer to the screenshot below.



Each of the above fields provides the help question mark ? at the end clicking which displays the tooltip as below.

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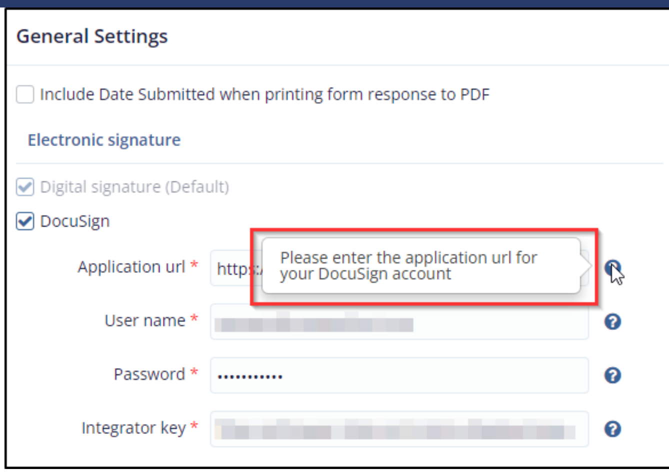
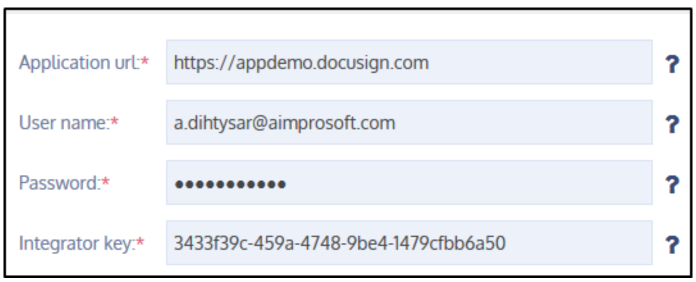


Below is an example for the DocuSign Settings.



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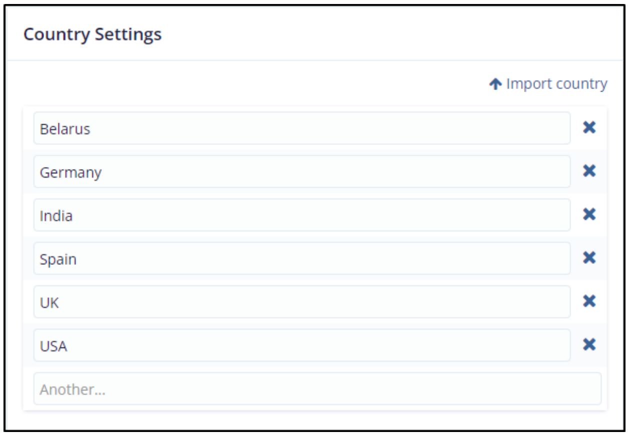
8.1.2 Country Settings

This tab allows the user to define Countries list which is used while adding Country Field in Form. You can add Countries manually or import them in a bulk. Refer to the screenshot below.



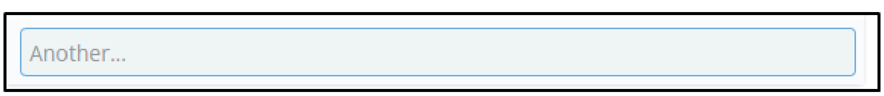
You can add countries in the following ways:

- Adding countries manually: Enter the Country name in the empty field. Refer to the above screenshot.
- Importing countries in a bulk: Click the Import Country button displayed at the top in the Country settings panel. Refer to the screenshot below. Click OK.

8.1.3 Adding Countries Manually

To add countries manually:

1. From the Settings menu, navigate to General>Country Settings.
2. The Country Settings tab displays the following:
   a. The Import country button
   b. The textboxes to add the country in a list
3. Enter the country name in the textbox with the text Another….and press Enter on the keyboard. The country gets added to the list with a green tick next to it.



4. Click cross ✖ next to the Country name to remove the country from the list.

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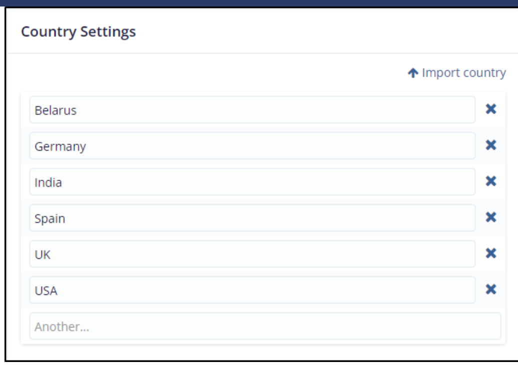
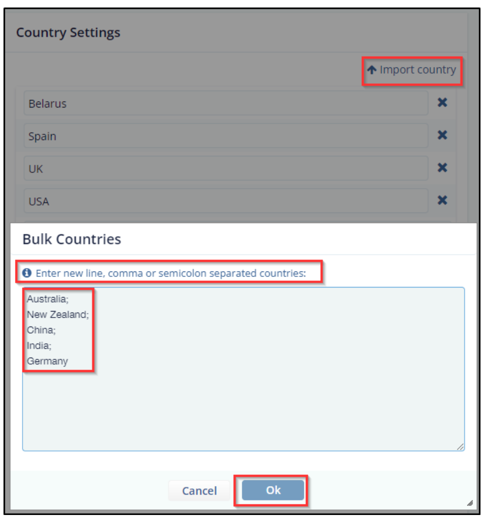


8.1.4 Importing Countries in Bulk

1. Click the Import country button from the Country Settings. The Bulk Countries dialog box opens which provides a long text box to enter the list of countries and two buttons: Cancel and OK.
2. Enter the countries list as specified in the message above the textbox and click OK.



3. The Countries are added to the Country list.

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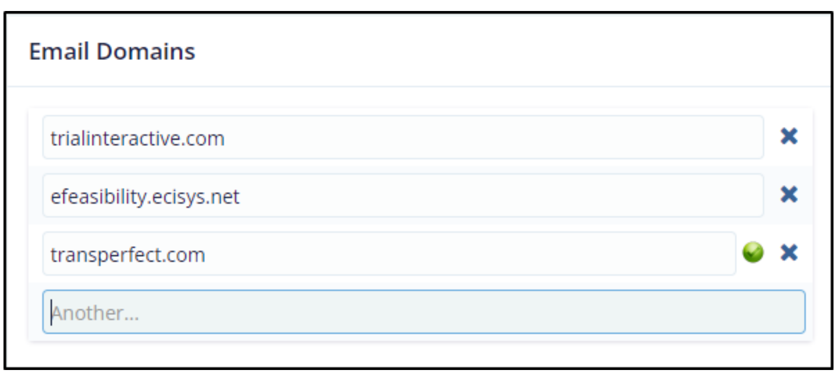
8.1.5 Email Domains

This tab allows you to define Email Domains that are used to send a Survey. These are the domains from which the manager sends a survey to the submitter. The Manager cannot send a survey until the domain for the Email is set.

To add new Email domain:

1. From the Settings menu, go to General >Email Domains
2. Enter a new email domain in the textbox with the text Another… and hit Enter or click the mouse button. The domain is added to the list with a green tick next to it.
3. Click the cross ✖ icon at the end of the domain name to remove it from the list.



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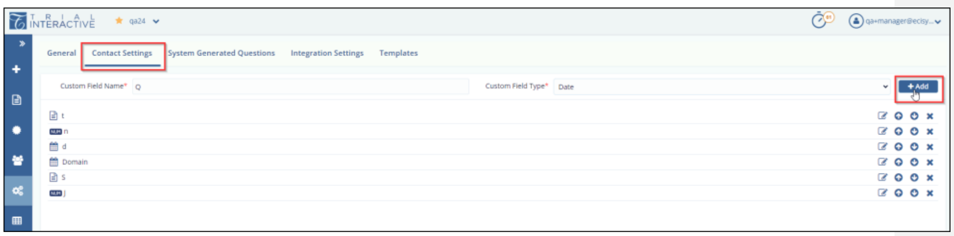
8.2 Contact Settings

This tab allows you to define the Custom Contact Fields that are used to map form questions with the Contacts while creating a new form. You can also map these fields while importing a new or existing survey from a source file.

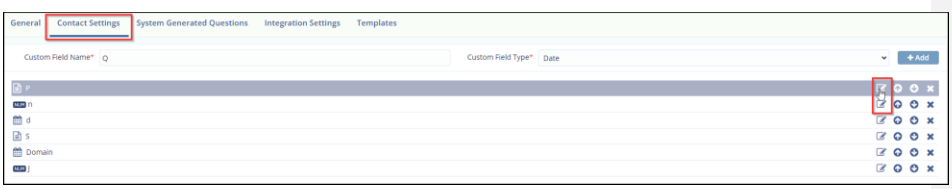
To create Custom Contact Fields:

1. From the Settings menu, click Contact Settings.
2. The Contact Settings tab displays two textboxes:
    a. Custom Field Name: A textbox to add a new Custom Field.
    b. Custom Field Type: A textbox with a dropdown to set the Custom Field type for the Custom Field.
3. Enter the name of the field in the textbox below the Custom Field Name.
4. Select the Field Type for the Custom Field Name from the Custom Type Field dropdown list. The allowed field types are text, date, and number.
5. Click the **Add** button next to the Custom Field Type textbox to add the Custom Field to the list.



8.2.1 Editing Custom Field

1. Click the Edit icon next to the field to edit the Custom Field Name to make it editable.
2. Enter the new name and hit Enter on the keyboard. The changes made to the field are saved.



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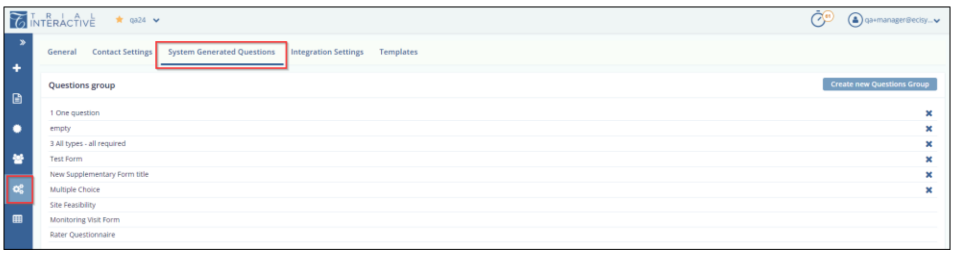
8.2.2 Changing the Sequence of Custom Field

1. Click the Up and Down Arrows to change the sequence of the Custom Fields. You can also drag-and-drop the field to the required position.

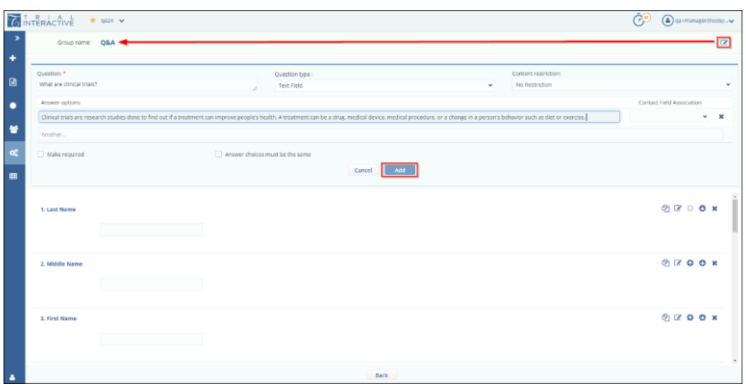
2. Click the Cross icon to remove the Custom Field from the list (Refer to the screenshot above).

8.3 System Generated Questions

This section contains Questions Group in which various question groups can be created. The list on the main page displays the questions groups.



Click on any listed question group name and screen with details opens. The question can be edited by clicking on **Edit** icon and editing window opens.



The edited question and answer are displayed at the end of the page.

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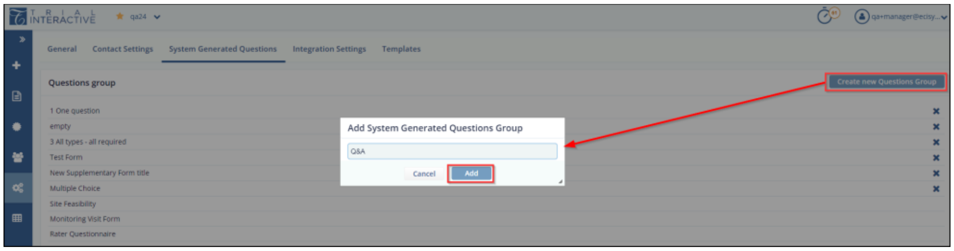
Clicking on **Create New Questions Group** button on the main screen opens below screen. Enter the name and click **Add** to create a new group.



8.4 Integration Settings

Origami Integration settings allows you to map a form and replicate it with the integrated TI folder. These settings can be enabled only for published forms.

When a submitter submits a response, not only does the sponsor receive the form but also the submitted form is saved to the integrated TI folder when the Integration Settings are enabled. The system will map the form metadata to the metadata of the document type existing in the TI room. The form itself will be saved as a PDF.

To integrate Origami setting, follow the guidelines as below:

1. From the Menu Bar click Settings icon from the left navigation menu.
2. The Settings Dashboard opens.
3. Click Integration Settings, and then the Select Form button.
4. The Published Form Search dialog box opens.

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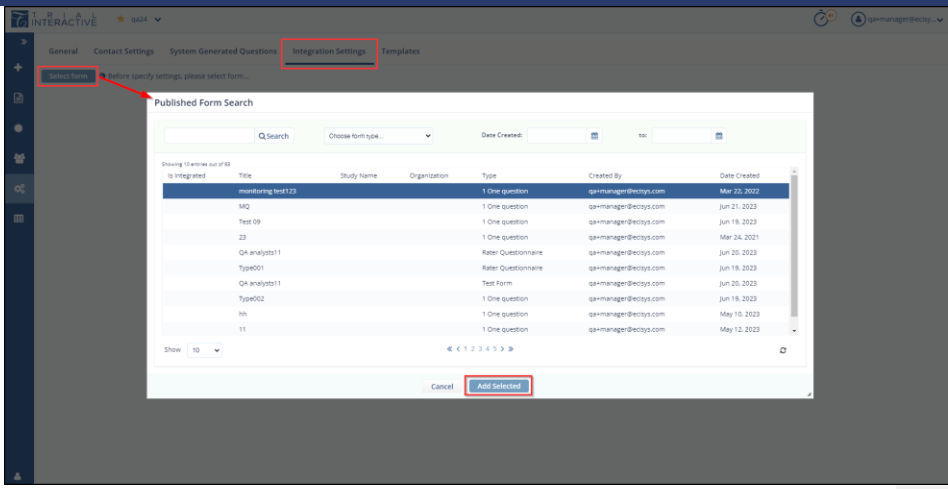
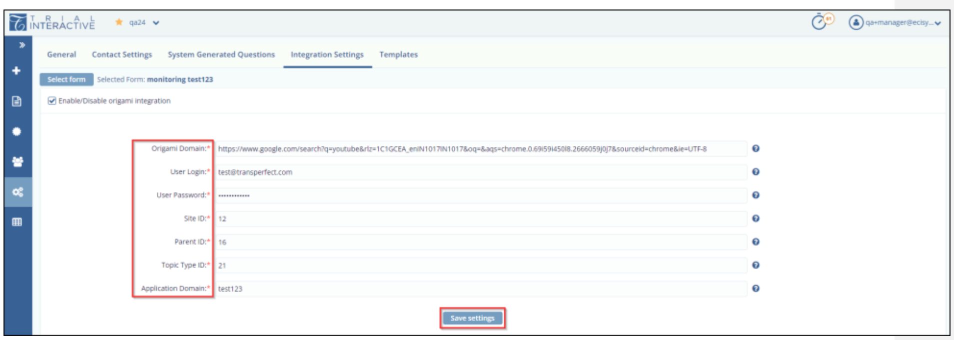


5. From the list of forms displayed in the window, click the required Form.
6. Click Add selected. The button is deactivated by default and is activated only when a form is selected.
7. You are redirected back to the Integration Settings window.
   Note: The user can also search for a form and select it.
8. Notice that the selected form title appears in the Selected Form textbox.
9. Select the Enable/Disable origami integration checkbox, to enable the settings for Origami Integration.
10. The fields for entering the settings parameters are displayed.
11. Enter the information as discussed.

Note: For more details on how to enter each parameter, proceed to section Origami Settings.

12. Once all the fields in the settings are entered, click Save Settings.



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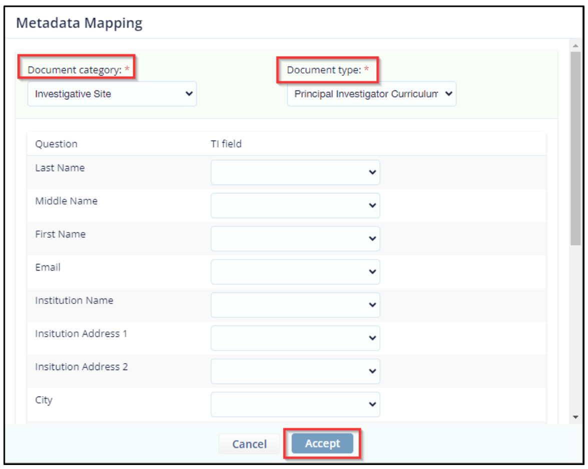
13. The Metadata Mapping dialog box opens which displays the following dropdowns:

    a. Document Category: This allows you to set the Document Category for a Form in TI system.

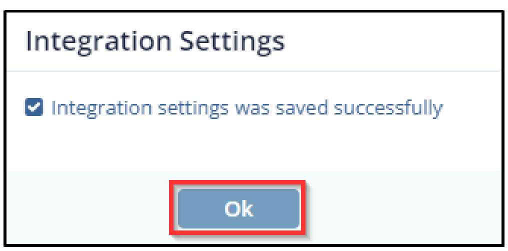
    b. Document Type: This allows you to set the Document Type for a Form in TI system

14. From the Metadata Mapping window, select the Document category and Document type.

15. Map the Questions with the appropriate field from TI field dropdown.



16. After mapping the fields, click Accept to save Origami Integration settings and integrate the form with the TI system. The success message dialog box appears when the mapping is done.



17. When a Manager sends a form as PDF in a survey mail, the submitter downloads it, completes the survey and submits it. When the form response is submitted, the response is sent to the Sponsor/CRO and also submitted to the TI room to which the form is integrated along with a Survey Completion mail to the submitter. Refer to the screenshot below.

8.4.1 Origami Settings

The Origami Settings contains the following fields:

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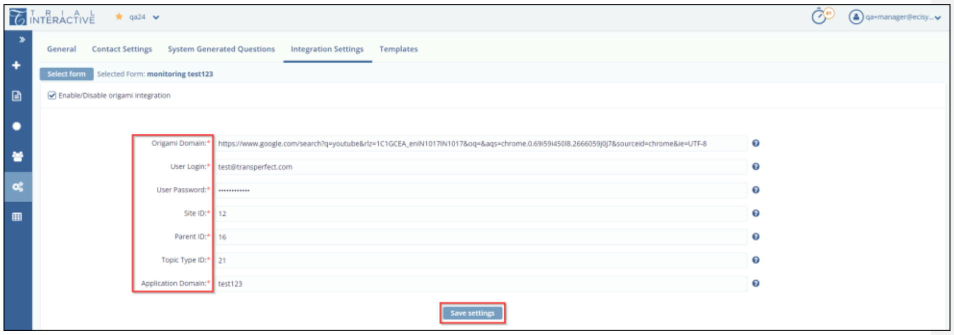
- Origami Domain: The Origami domain, which is the portion of the TI room link.
- User Login: User Login is the TI Login of user who created the form in E-Feasibility.
- User Password: User Password is the TI password for the user login
- Site ID: The ID of a site. This Id is available on the TI room link
- Parent ID: The Parent ID of a site. This id is available TI room link
- Topic Type ID: This is a ID of the topic.
- Application Domain: The domain of TI application.



To enter the Origami Setting information, follow the below steps.

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Warning: The login credentials for E-Feasibility and Trial Interactive should be the same.

1. Open Trial Interactive account in a different browser.
2. Open a Room which you want to integrate with the Form.
3. Copy the URL from the room till /Origami and paste it in the Origami Domain field in E-Feasibility. An example of Origami Domain is shown below.
4. In E-Feasibility, enter the same Username and Password as used for both accounts.
5. From Trial Interactive room, copy the Site ID from the URL and paste it in the Site ID field in E-Feasibility as shown below. The Site ID is the ID of a Site in a Room.
6. In Trial Interactive room, open the folder where you want the form to be saved when the response is sent. Copy the Parent ID that appears in the URL and paste it in the Parent ID field in E-Feasibility as shown below.
7. In E-Feasibility, enter the Topic Type ID.
8. Enter the Application Domain.
9. Click the Save Settings button. Proceed to steps 13 to 17 in Integration Settings mentioned above to continue the further procedure

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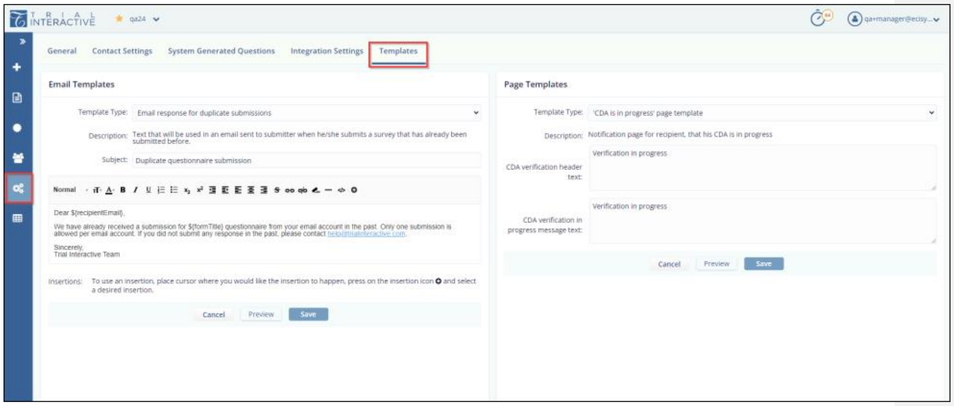
8.5 Templates

This tab defines the templates that are predefined and used in mail while sending a Survey.

Templates tab is divided onto two sections:

- Email Templates
- Page Templates



8.5.1 Email Templates

You can use the Email Templates section to view and modify the predefined email templates while sending various types of emails related to surveys.

The types of predefined email templates that are available in the system are depicted in the screenshot below.

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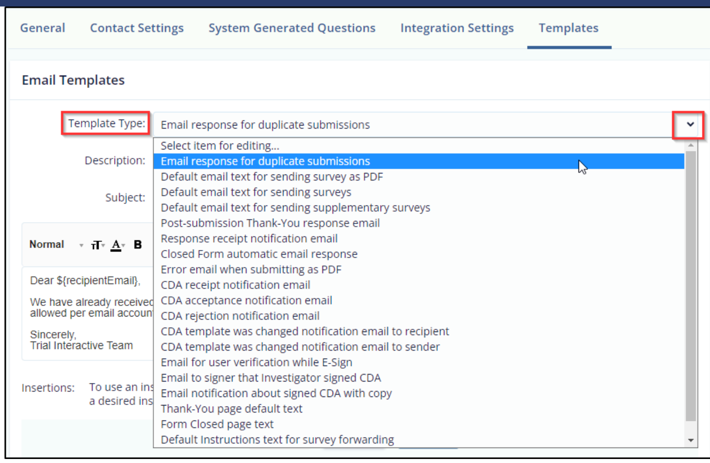

Before discussing on how to edit a predefined email template, let us take a look at the various components of the email template window:

- Template Type: A dropdown, which display the list of predefined email templates.
- Description: The non–editable textbox that describes where the selected template is used.
- Subject: A textbox, which allows you to enter/modify the Subject for an email.
- Email Text Editor (Body): An editable text editor, which allows you to enter/modify the content of an email.
- Toolbar: The ribbon, which provides you different formatting options in the email text editor.

Refer the table below for more details on the formatting options:

Toolbar Icons	Description
Normal	**Text Format**: Allows you to select the font style for the text.
	**Font Size**: Allows you to change the text size.
	**Font Color**: Allows you to change the text color.
B	Allows you to make the text **Bold**.
I	Allows you to make the text ***Italics***.
U	Allows you to make the text **Underlined**.
	**Ordered List**: Allows you to insert ordered list.
	**Unordered List**: Allows you to insert unordered list.

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x_2	**Subscript**: Allows you to insert the subscript.
x^2	**Superscript**: Allows you to insert the superscript.
	Outdent: Allows you to align text to the **Left.**
	Indent: Allows you to align text to the **Right.**
	Justify Left: Allows you to align text to the left justified.
	Justify Center: Allows you to align text to the center.
	Justify Right: Allows you to align text to the right justified.
~~S~~	**Strike Through**: Allows you to strike the text.
	Add Link: Allows you to insert a link to surveys or other references in a mail. Refer section Adding a Link in the mail for more details on this.
	Remove Link: Allows you to remove the link.
	Cleaner Style: Allows you to remove the text formatting.
	Horizontal Rule: Allows you to insert a line below the text.
</>	**Source**: Allows you to view the text in **html format.**
	Insertions: Allows you to insert in between text. Insertion contains two types: Survey Title: Allows to insert the Survey title. **Recipients Email**: Allows to insert the Recipients Email.

- The Cancel, Preview and Save buttons, to preview the template. Refer to the screenshot below.

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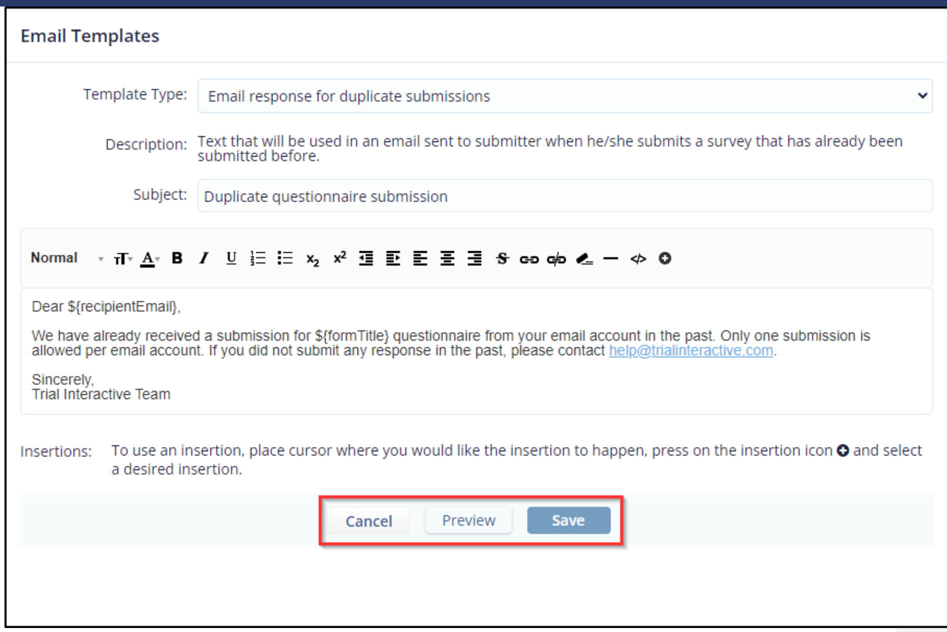

Editing a Predefined Email Template

1. Click the Template Type dropdown to reveal a list of pre-defined Email Templates.
2. Select the required template and edit the content of the email in the text editor as required.
3. Click Save to save the changes.

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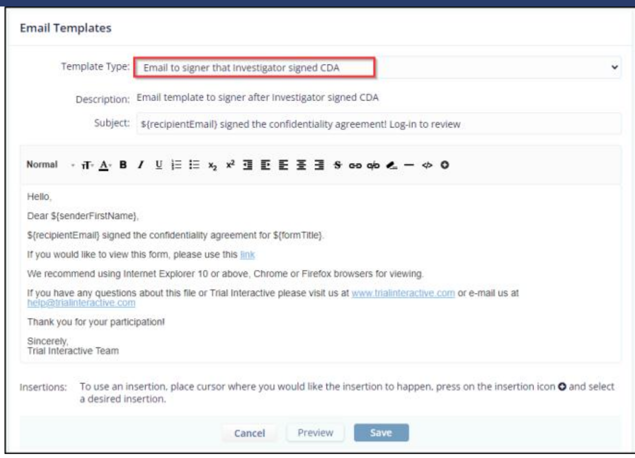
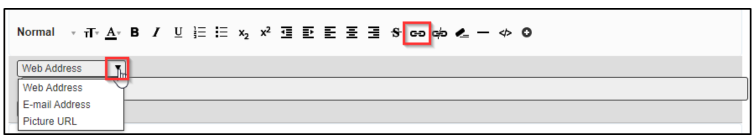


Adding a Link in the Email

To add a link in the email:

1. Select the Template Type from the Email Template section to which you want to add a link.
2. Select the text for which you want to add the link.
3. Click the Add link tool from the toolbar ribbon. A new row below the toolbar opens which provides:
    a. A dropdown, which contains options Web Address, Email Address, and Picture URL.
    b. A textbox to enter/copy the link.
    c. OK button.



4. Select the required option from the dropdown
5. Enter/Copy the required link and then click the OK button. This binds the link to the text.
6. Click the Save button. The changes made in the email are saved and when Submitter clicks the link in a mail sent to him by manager, he/she is prompted to the particular page of a link on the browser. Refer to the screenshot below.

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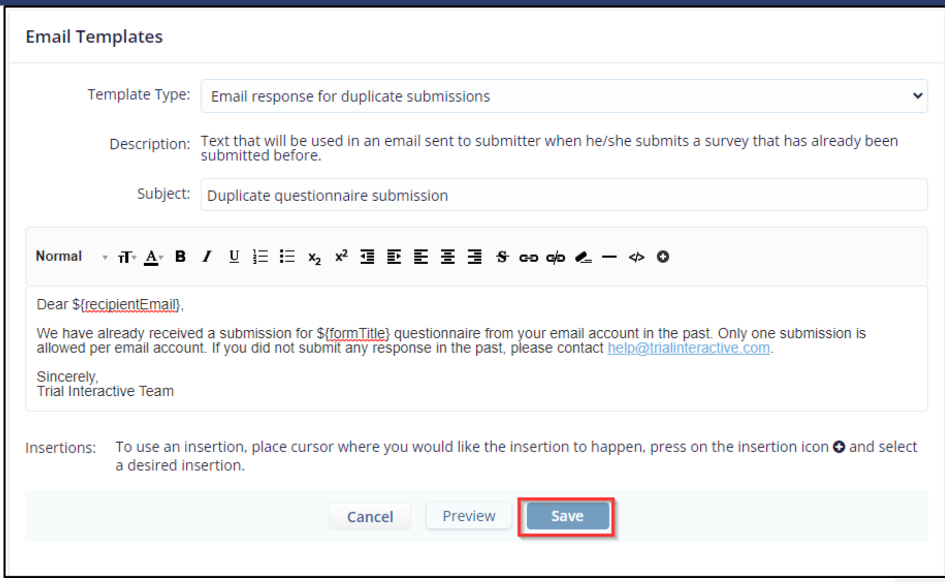

8.5.2 Page Templates

These templates are used to display the progress of the CDA and CDA Signing process when the submitter signs the CDA and sends it for CRO/Sponsor Signing. Here also you can edit only the header text as required.

The Page Templates is divided into the following:

- Template Type: A dropdown, which display the list of templates that are used to display the text when the CDA is in progress.
- Description: The non-editable textbox that describes the information where the page is used.
- Initial Instructions: The text editor, which allows you to enter/modify the headers/instructions for the page.
- The Cancel, Preview and Save buttons, to preview the template.

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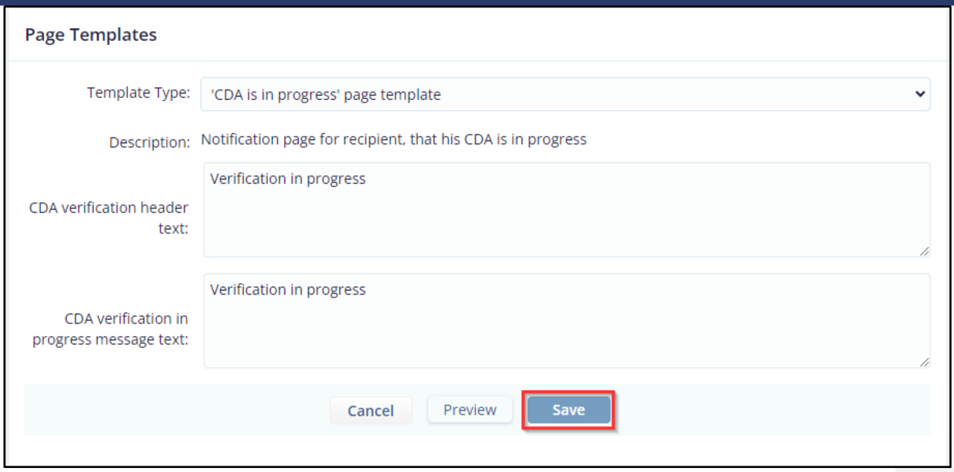
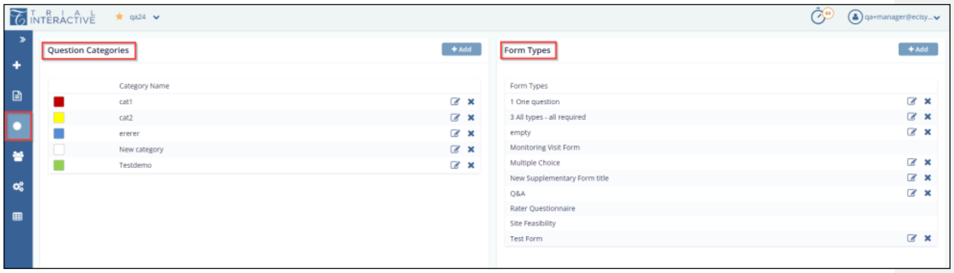


9. Categories

Categories allow you group questions under different categories and forms under different Form Types.

Categories tab is divided into two sections:

1. Question Categories: This allows you to add, delete or edit Question Categories.
2. Form Types: This allows you to add, delete or edit Form Types.



9.1 Question Categories

To create categories:

1. Click Categories from the Menu Bar. The Categories dialog box opens with two sections: Question Categories and Form Types.
2. Click the Add  button from the Question Categories section. The Add Question Category dialog box opens.

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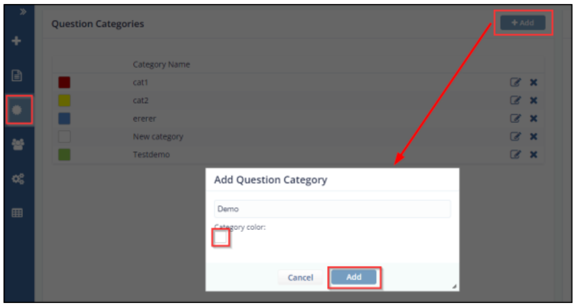
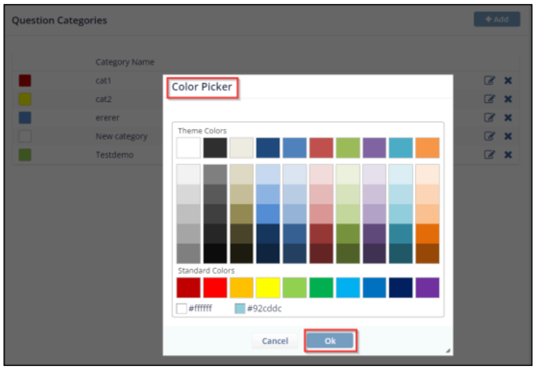
3. Enter the Question Category. You can also set the color for the category.



4. On the Add Question Category dialog box, select the Category Color checkbox to open the Color Picker.



5. Select the color and the click the OK button.
6. You are redirected to the Add Question Category dialog box which displays the selected color in the Category Color checkbox.
7. Click the Add button to add the Question Category to the list.

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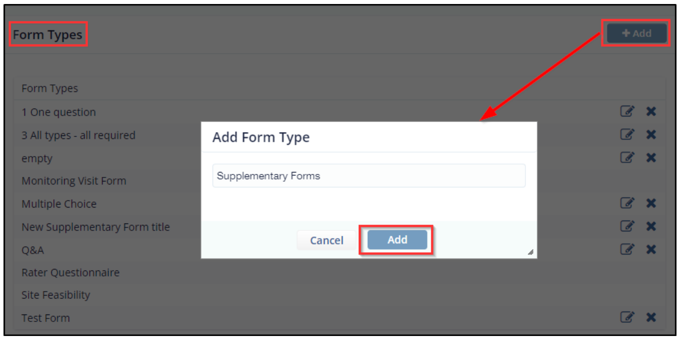
8. You can also update the Title and Color of the Category by clicking the Edit icon next to the Category name. The Update Category Question dialog box opens.
9. Update the Title and/or color as required and then click Update to save the changes.
10. Click the cross icon next to the Category name to remove it from the Category list.

9.2 Form Types

Form Type is a mandatory field that is set while creating a new form.

To add Form Types:

1. Select Categories from the Menu Bar. The Categories dialog box opens.
2. Click the Add + Add button from the Form Types section. The Add Form Type dialog box opens. Refer to the screenshot below.
3. Enter the Form Type and then click Add to add the Form Type to the list.



4. Follow the same procedure as discussed in [Steps 8 -10 in section Question Category](#) to update and delete the Form Type.

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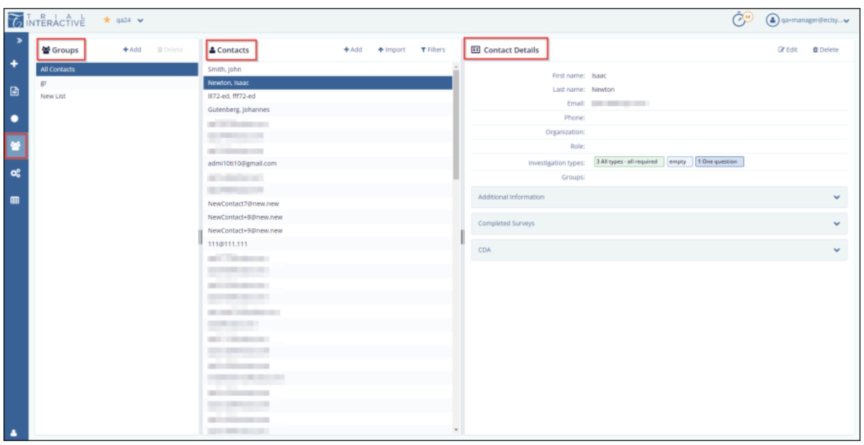
10. Contacts

Contacts are the members in a Survey. You can add, edit and delete the contact/groups. The Contacts dialog box is divided into below sections:

1. Groups
2. Contacts
3. Contact Details



10.1 Groups

This section displays all Groups of contacts. By default, All Contacts group is selected.

Groups allow you to:

1. Create New Groups
2. Delete New Groups

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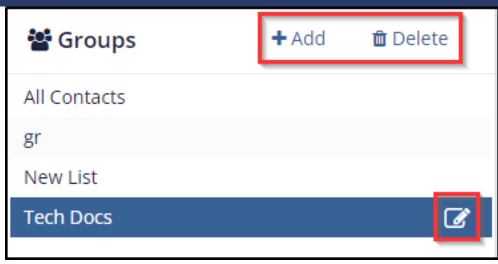
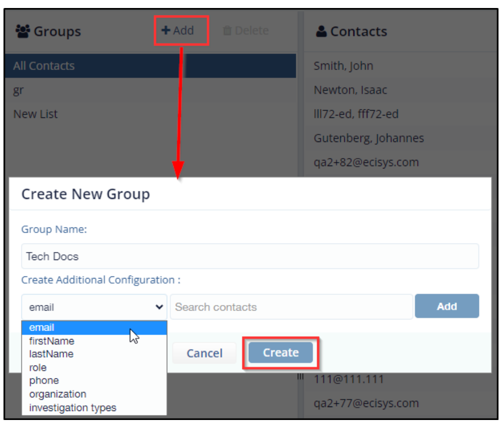


10.1.1 Creating New Group

1. Click the Add button from the Group Section
2. The Create New Group pop up window is displayed.
3. Enter the Group Name and then click the Create button to add the group to the list.



4. To add contacts to the Group, type contact name in 'Search Contacts' and click Add.
5. Click **Create.**
6. Click the required **Group** view the added contacts to the group.

10.1.2 Deleting Group

Note:

1. You can delete only the newly created group.
2. The **All Contacts Group** cannot be deleted.
3. The **Bin** icon is visible only for the newly created groups.

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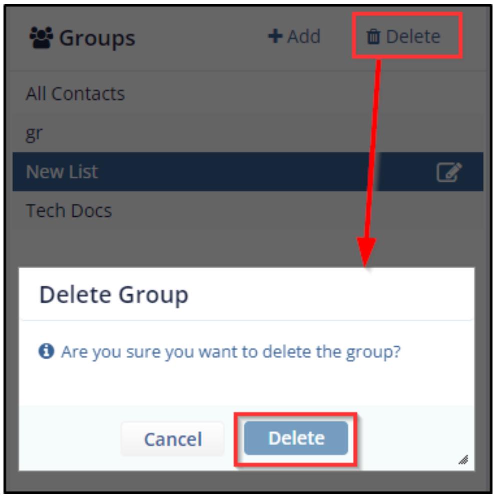
To delete the group:

1. Select the Group which you want to delete.
2. Click the Delete button in the bottom left corner from the Groups section. The Delete Group dialog box opens asking for the confirmation of group deletion. Refer to the screenshot below.
3. Click Delete to delete the group or Cancel to cancel the action.



10.2 Contacts

This section guides the user to Add, Import, Edit, and apply Filters contacts in a group.

10.2.1 Add Contacts

1. In Contacts section, click Add button. The Create New Contact pop up window is displayed.
2. Enter details in all the fields on the screen.
3. Click **Create** button to create a new contact that is added in the list on Contacts main screen.

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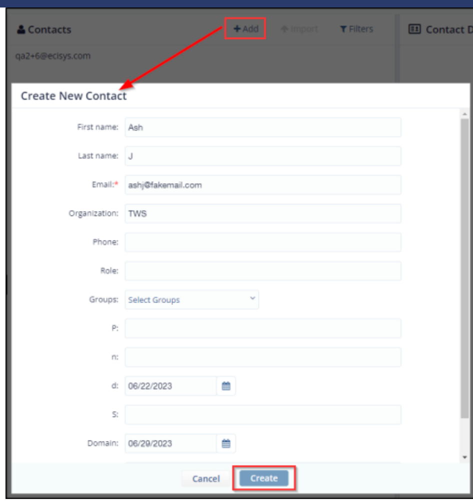
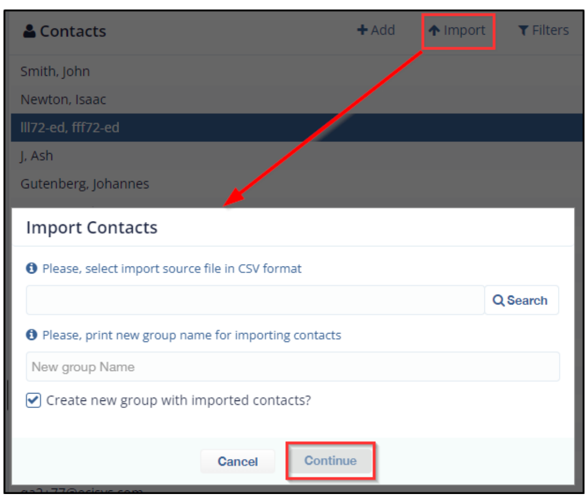


10.2.2 Import Contacts

1. Click **Import** button. Import Contacts pop up window is displayed.
2. Click the **Search** button to locate the CSV file for importing contacts.



3. The Search box with a magnifying icon to import the source file from the system.
4. The Create New Group with imported contacts? checkbox allows you to create new group and import contacts simultaneously in the group.
5. The Cancel and Continue buttons - The Continue button is deactivated by default and is activated only when the source file is imported.

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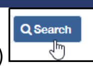
6. Click the magnifying glass (Search button) 

icon next to the textbox to import the source file. The File Upload dialog box opens to allow you to import the file from the system, which contains the list of contacts.

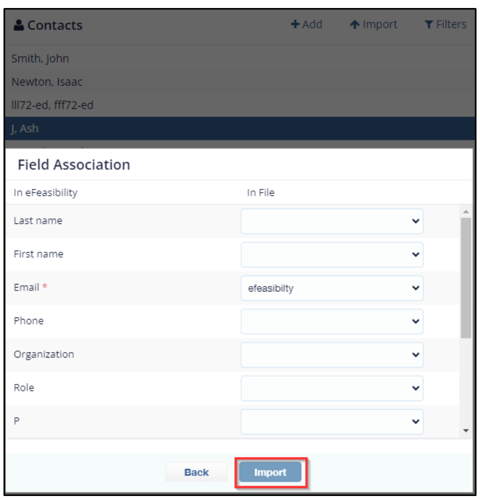
7. Select the required file to import and click Continue.

Note:

a. You can import only a .CSV file.
b. The **Source file** and the **E-Feasibility** should have at least few common fields.
c. The system gives an error if there are no matching fields in **Source file** and **E-Feasibility**.

8. The Field Association dialog box opens. Setup the mapping between E-Feasibility fields and the Source file fields. Below screenshots show an example of mapping fields.

John	Doe	120 jefferson st.	Riverside	NJ	8075
Jack	McGinnis	220 hobo Av.	Phila	PA	9119
John "Da Man"	Repici	120 Jefferson St.	Riverside	NJ	8075
Stephen	Tyler	7452 Terrace "At the Plaza" ro	SomeTown	SD	91234
	Blankman		SomeTown	SD	298
Joan "the bone", Anne	Jet	9th, at Terrace plc	Desert City	CO	123



9. Once the mapping is done, click the Import button. A dialog box opens displaying the progress of the import result along with the total count of Contacts, Imported contacts, Updated contacts and Failed import.

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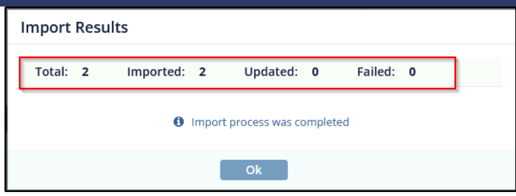
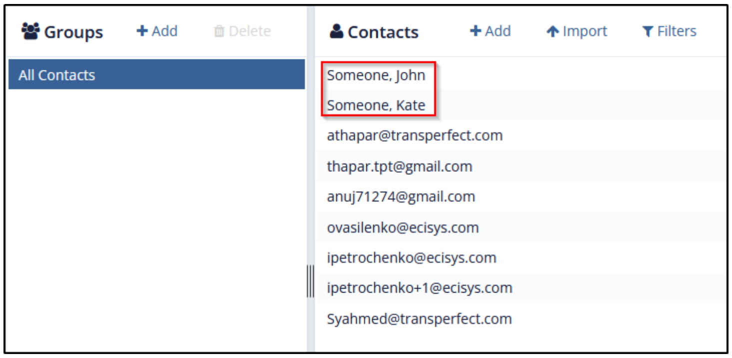


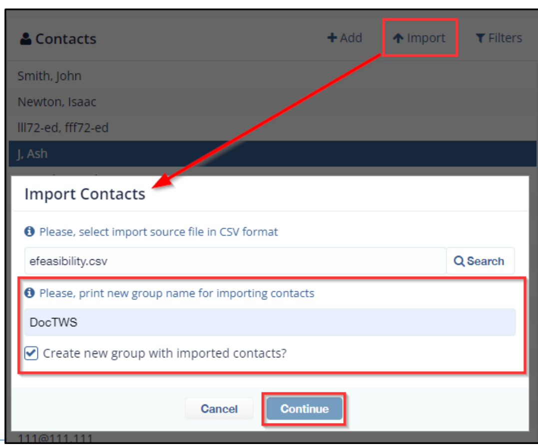
10. Click OK to import contacts to All Contacts list.



Import Contacts in a Group

You can create a group and import contact from the source file simultaneously as explained below.

1. Select the Create New Group with imported contacts? check the box from Import Contacts dialog box. A textbox with the text New Group Name displays above the checkbox.



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2. Enter the Group name, select the Source file and then click Continue to import the Source file as discussed in section Import Contacts.

3. The Group and Contacts are added to the list.

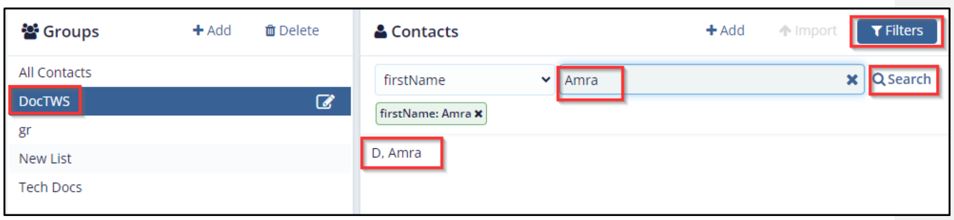
10.2.3 Search Contacts

To search contacts:

1. Select the Group from the Groups section from which you want to search contact.

2. Click the Filters  icon from the Contacts pane. The Search option is enabled.

3. Enter the Contact name or email in the search box. The contact is displayed in the search section if available.



10.3 Contact Details

You can View, Edit and Delete the Contact from Contact Details section.

The Contact Details section displays the following sections:

1. Contact Details: This section displays the Contact Name along with the contact fields.

2. Additional Information: This section displays the Custom Contact Fields.

3. Completed Surveys: This section displays the table of completed Surveys by the contact with the columns Title, Date Completed, and Preview (eye icon) option to view a Survey and Download option to download a Survey.
4. **CDA:** This section displays the Title, Status, the last updating of the form and the actions to take on the form.

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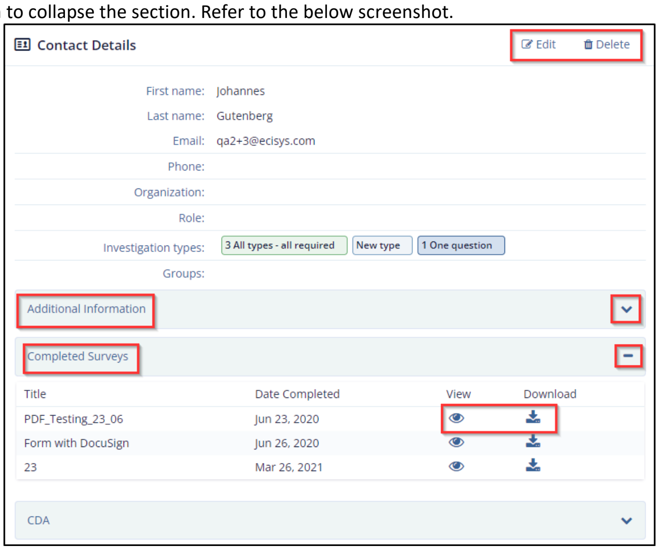
a. **Preview:** Click the **Preview** icon to open the form in a new tab.

b. **Download:** Click the **Download** icon to download a PDF of the form.

Click the Down Arrow icon to the right of every section header to expand it (Refer to the above screenshot). This arrow icon is converted to horizontal line after expanding the section. Click the icon to collapse the section. Refer to the below screenshot.



10.3.1 Editing Contact

To edit the Contact:

1. Click the Edit button in the top right corner of Contact Details section.

2. The Contact Details section displays all Contact fields that are editable along with three buttons:

- Cancel (Edit button changes to Cancel) in the top left corner
- Delete Contact in the bottom left corner
- Save Contact in the bottom right corner.

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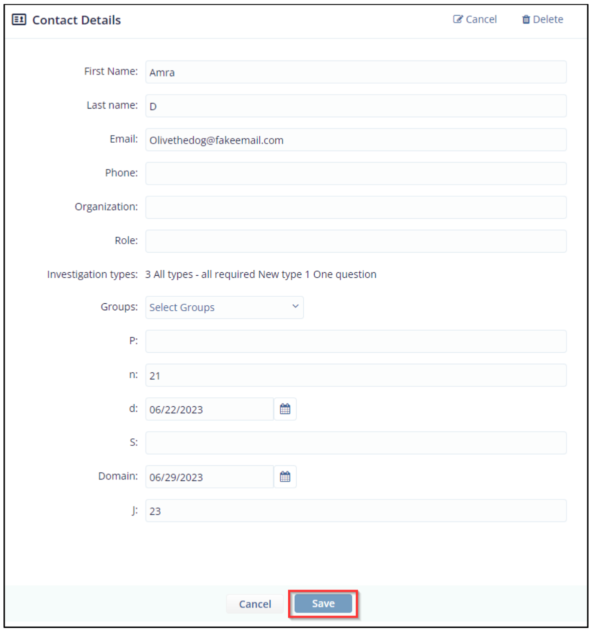
3. Edit the fields as required and click Save Contact to save and update the changes. Refer to the screenshot below.



10.3.2 Deleting Contact

You can delete contact in the following ways:

1. Click the Cross  icon displayed on the right side of Contacts section.
    a. Select the contact from the Contacts section.
    b. Click the cross icon to delete the contact.
    c. The Delete Contact from this Group pop up window is displayed. Refer to the screenshot below.

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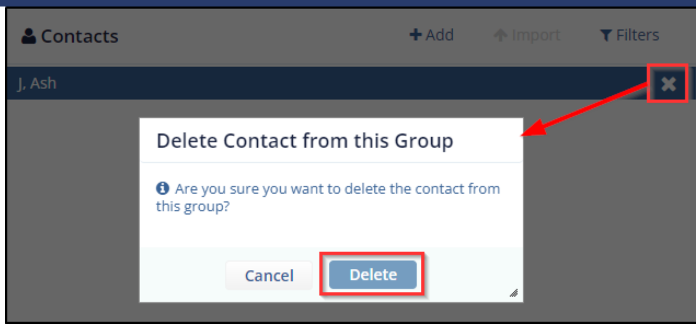
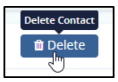
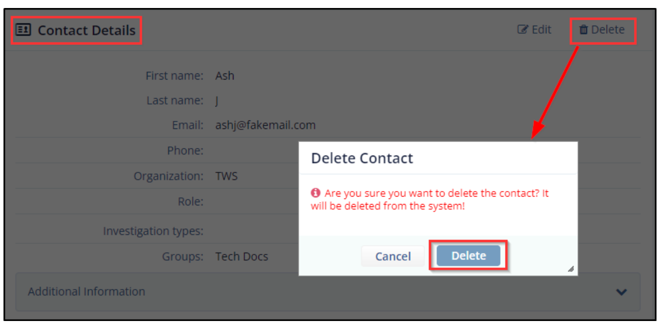


d. Click **Delete** to execute the action.

2. Through the Delete 

button displayed in the Contact Details section.
   a. Click the Delete button from the Contact Details section. The Delete contact pop up window is displayed.
   b. Click **Delete** to execute the action. Refer to the screenshot below.



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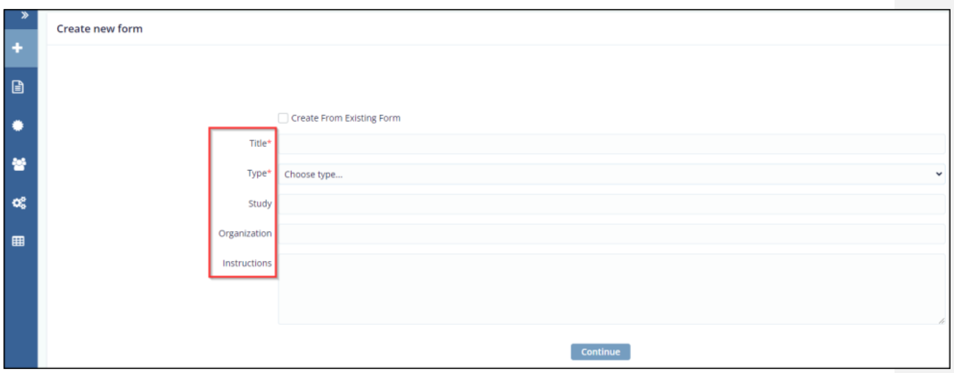
11. Creating a Form for a Survey

Forms are the Questionnaires, or a predefined series of questions used to collect information from the individuals. Every project has forms created in it for a survey.

You can create new forms and perform actions on it, or clone from an existing form. Only an Admin, Manager and Editor have the ability to create a Form.

Every Form needs to complete the following to start a survey:

- Title: It is an editable text filed and a unique name of a Form. This field is mandatory.
- Type: A dropdown that displays all the available surveys/form types. These Form types are created by a Manager in Categories section of E-Feasibility. This field is mandatory.
- Study: **It is an editable text field and needs to be filled if a form is directly associated with a specific study.**
- Organization: **It is an editable text field and needs to be filled if a form is directly associated with a specific organization.**
- Instructions: It is an editable long text field which is used by user to display instructional notes to each recipient Form.



11.1 Creating Form

To create a new Form:

1. Open a required project.
2. Click New Form  from the Menu Bar.
3. Enter the fields and click Continue.

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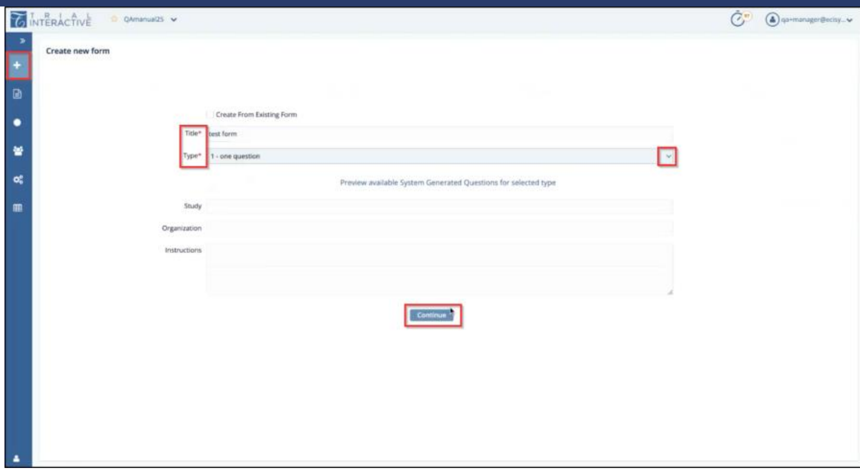

Note: You can also create a new form from the existing list of forms by clicking **Create from Existing Form** checkbox. Proceed to Cloning a Form for further details.

Clicking Continue leads you to the next page of the Create New form dashboard that consists of the following components:

- Changing Logo
- Add Questions
- Add Sections
- Close
- Actions
- Publish
- Editing Instructions

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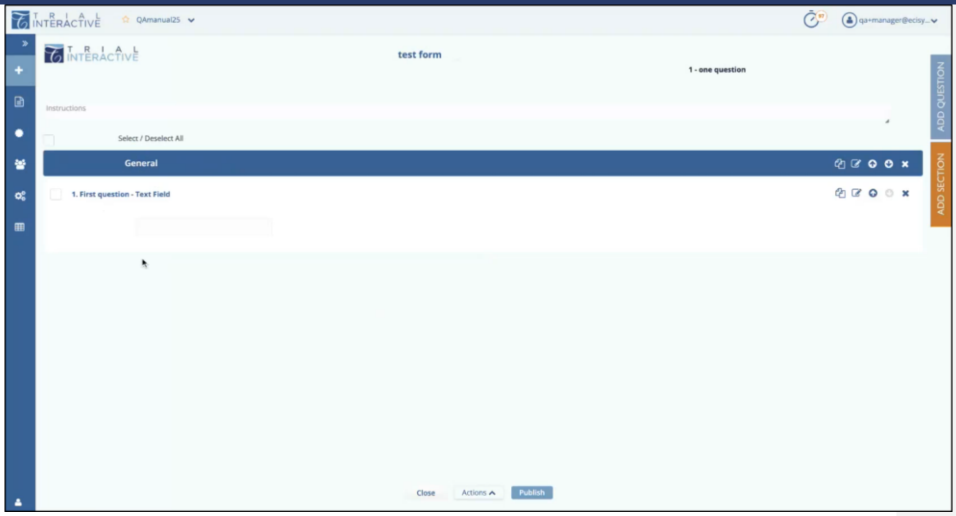
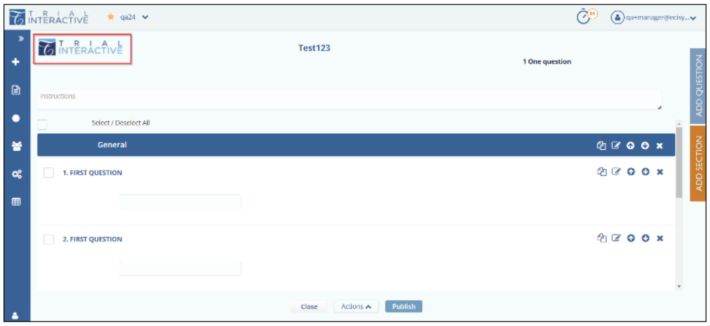


11.2 Changing Logo

You can change the Logo of a Form from the upper left corner of a form. Note: You can change the logo of a form only when it is in Draft mode.

To change Logo:

1. Open a required draft project.
2. Open a Form whose logo you want to change. The form opens in an Edit mode.
3. Double click the Logo that is next to the form name. The File Upload dialog box opens.



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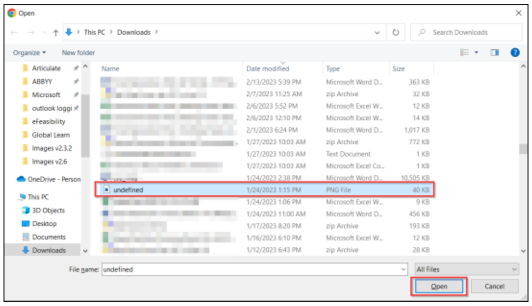
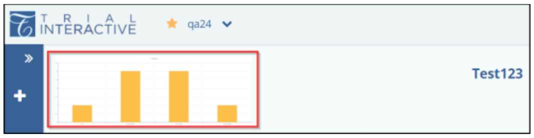
4. Select any picture of choice and then click Open. Refer to the screenshot below.



5. Clicking Open uploads the picture and applies it to the Form Logo.



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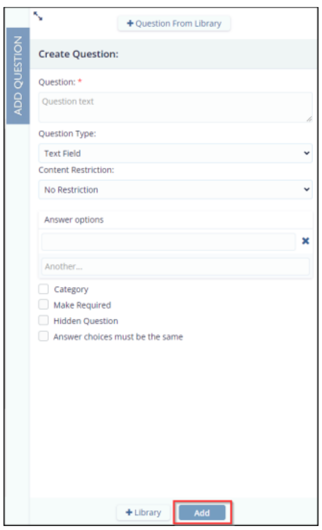
11.3 Adding Questions to a Form

Click the Add Question Tab displayed vertically on the right side of the screen.

This action reveals the Add Question panel as shown in the screenshot.



Notice that the panel has three sections:

1. Question from Library: This allows you to select and add question from the list of saved questions. This allows you to clone question.
2. Create Question: This allows you to add questions manually.
3. Library: This section allows you to save the question to the list of question, which can be later retrieved from the library.

The Create Question dialog box provides an interactive way that guides you through various options/features that you might want to associate to a question while creating it.

The Create Question dialog box, that appears when you click the Add Question tab on the Draft Form page, provides the following components/features, each of which goes into creation of a question type:

1. Question – A text field to enter the question.
2. Question Type – This appears as a dropdown when you click the down arrow next to the field and provides the following options:

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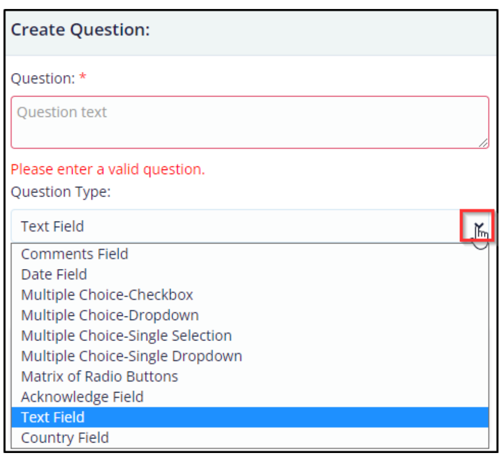
- Comments Field: This provides a textbox, which allows you to enter comments for the question.
- Date Field: This allows the submitter to select the appropriate date from a calendar.
- Multiple Choice- Checkbox: This allows you to select the appropriate answer by selecting the checkbox.
- Multiple Choice- Dropdown: This allows you to select the appropriate answer from the dropdown.
- Multiple Choice-Single Selection: This provides a radio button, which allows you to select only one answer.
- Multiple Choice-Single Dropdown: Dropdown with radio buttons which allows the user to select only one answer from the dropdown.
- Matrix of Radio Buttons: This allows the user to fill the question title in columns and rows and receives several answers or corresponding answer values.
- Acknowledge Field: This allows the user to fill only the question title and choose a prefix type. This question later displays the number of received responses.
- Text Field: This provides a textbox, which allows you to enter the answer for the question.
- Country Field: A dropdown with list of countries, which are defined in Country Settings.



You can provide extra functionalities to a question and its type through the following sub-sections in the Create Question dialog box:

1. Answer Options – This appears as a sub-section inside the Create Question dialog box. The behavior of this section changes as per the option selected from the Question Type dropdown.

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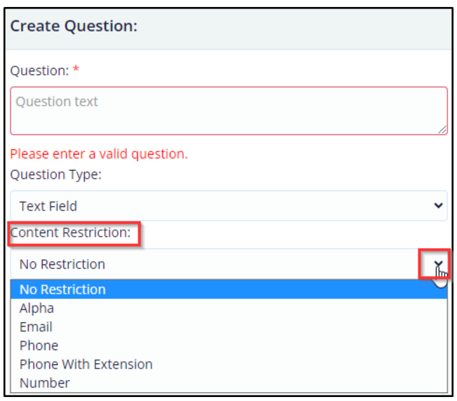
2. Content Restriction – This appears as a dropdown only for Text Field type of questions and is especially important if you want to provide restrictions to the type of answer that the submitter would be allowed to enter in the published form. The various options that appear on clicking the arrow next to the field as:

- No Restriction
- Alpha
- Email
- Phone
- Phone with Extension
- Number



The usage of this option along with the Text Field type of question is discussed in the section Content Restriction.

3. Checkboxes: The white space at the end of the dialog box provides various checkboxes that allow you to provide extra functionalities to a question. Refer to the screenshot below.

Below is a detailed description of the checkboxes:

- Category: This allows you to set the Category for the question.
- Make Required: This allows you to make the question required and restricts the submitter to proceed further without entering answer to this question.
- Hidden Questions: This allows you to display a specific question only after a specific answer option is selected. Proceed to Hidden Question for detailed information on this.
- Answer choices must be the same: This prevents the submitter from submitting a survey if the answers entered for a question with this restriction is different. This is applicable only for the Text Field type as shown below. Below is an example for the Answer choices.

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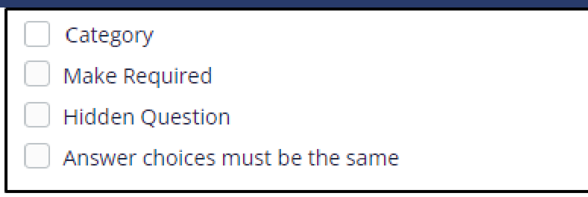

4. Setup last sub-question as text answer: This allows you to provide the last answer option as a text field.
5. Include in Ranking: This provides a question with certain score based on the ranking applied for the sub questions. To know more on this, refer to Reports. This checkbox is applicable only for types.

Note: The combination of functionalities through the checkboxes also change behavior with the type of question selected by you. From the above, we can conclude that a question is finally the effect of combinations of the various components/features.

Behavioral patterns of the questions can be broadly classified into:

- Others: This includes country field, text field, comments, and date fields.
- Multiple choice questions: This includes all Multiple-Choice Questions.

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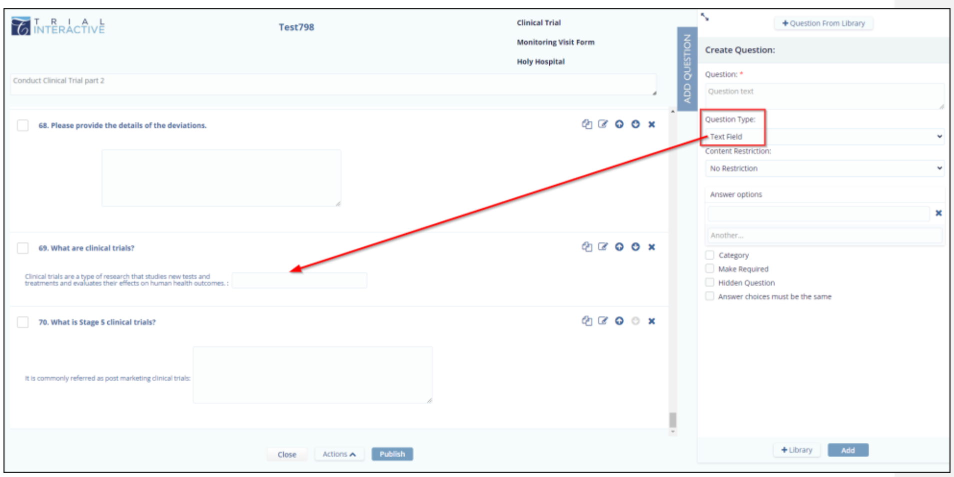
11.3.1 Steps to Add a Question

1. On the Form Draft page, click the Add Question tab.
2. Enter the question.
3. Select the Question Type from the dropdown menu.
4. Select an option from the dropdown menu of Content Restriction.
5. Enter the Answer Options.
6. Select the required checkbox to apply the property to the question.
7. Click Add at the bottom of the screen.

Below Screenshots show examples of question types:
Others – Text, Comment, Date and Country

Question Type – Text Field



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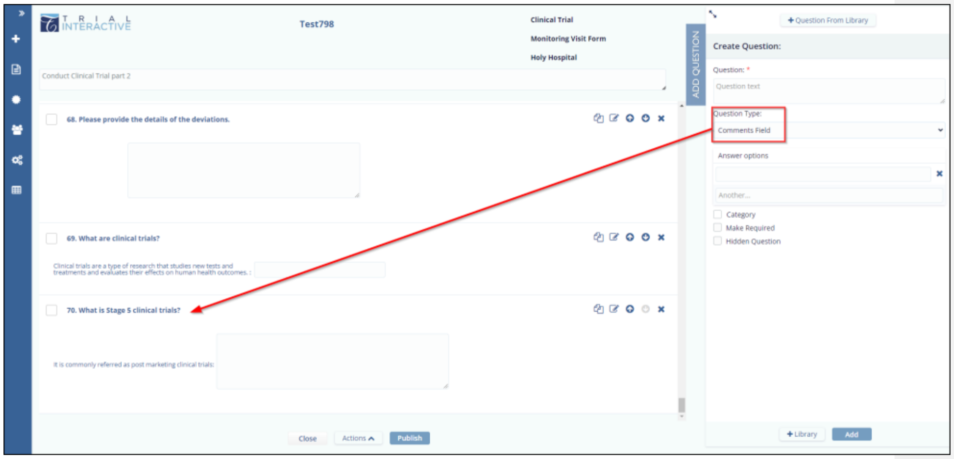
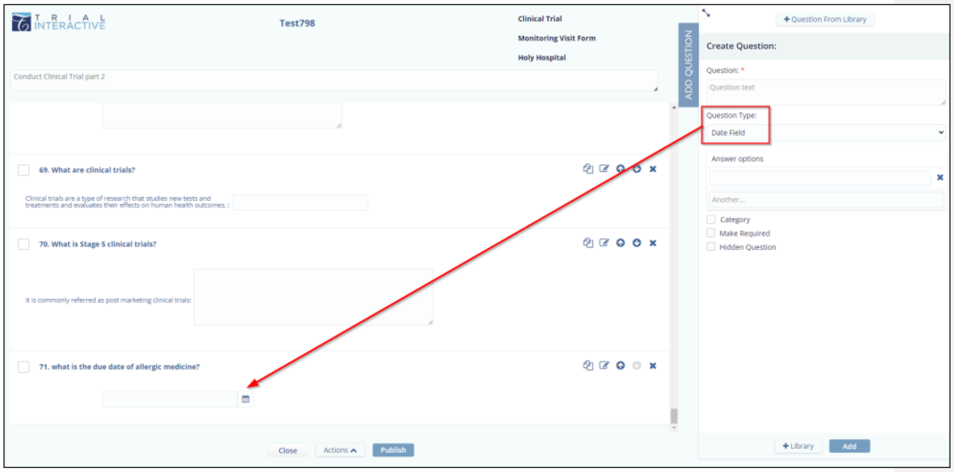
Question Type – Comments



Question Type – Date Field



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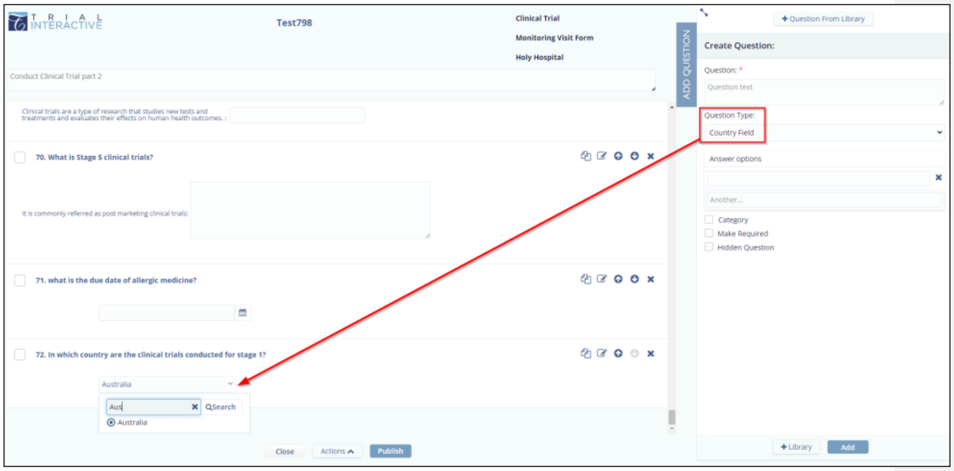
Question Type – Country Field



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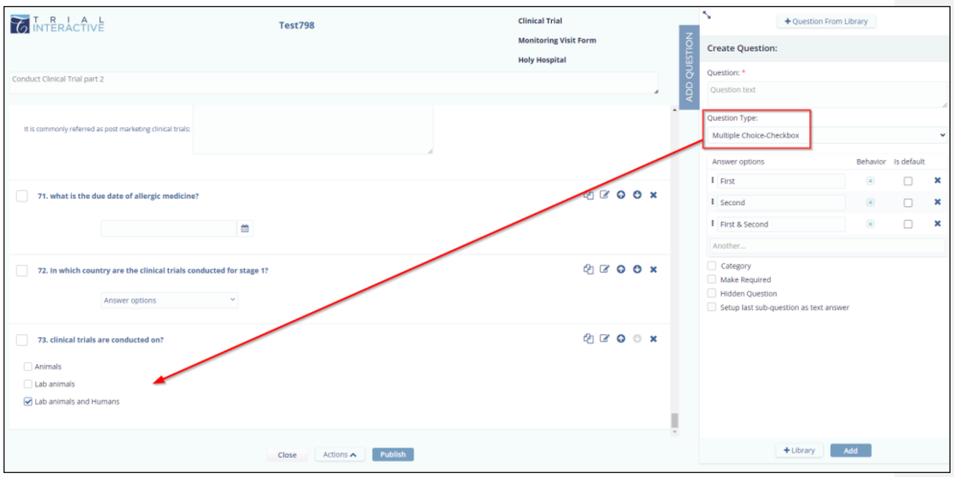
Multiple Choice Questions

For the question type as Multiple Choice, the sub-section Answer options provide the following:

- Answer Options textbox: This allows you to enter the options for the answers for the question. You can add multiple answer options as required.
- Behavior: This allows you to set the behavior of the question: Visible and/or Hidden. Refer to Hidden Question for the detailed information.
- Is Default: This allows you to set the selected answer option as default. Refer to the screenshot below.

Question Type – Multiple Choice Checkbox



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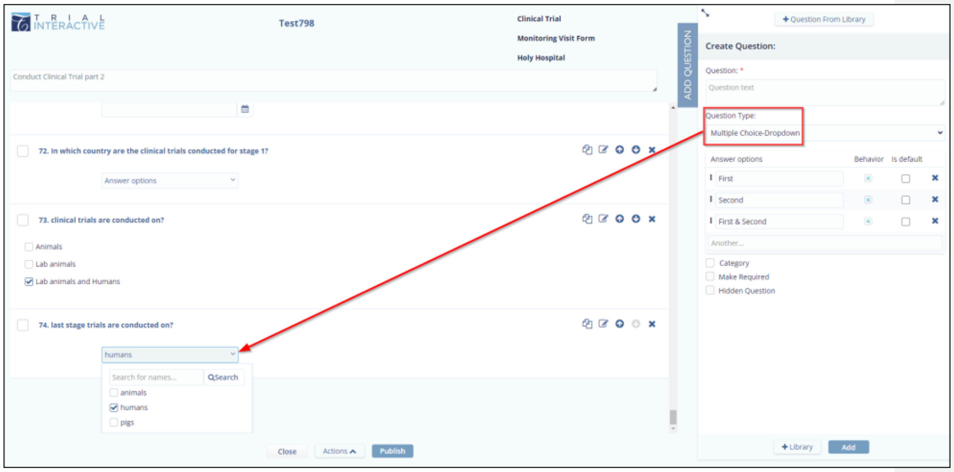
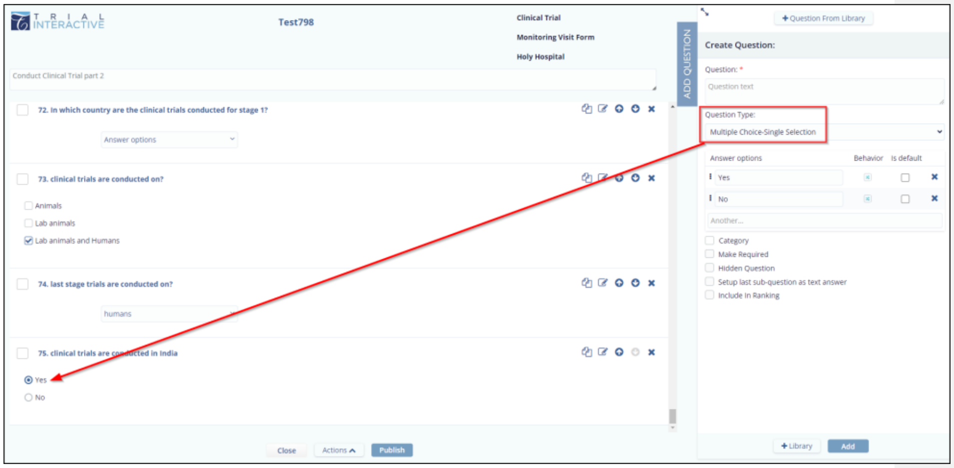
Question Type – Multiple Choice Dropdown



Question Type – Multiple Choice- Single Selection



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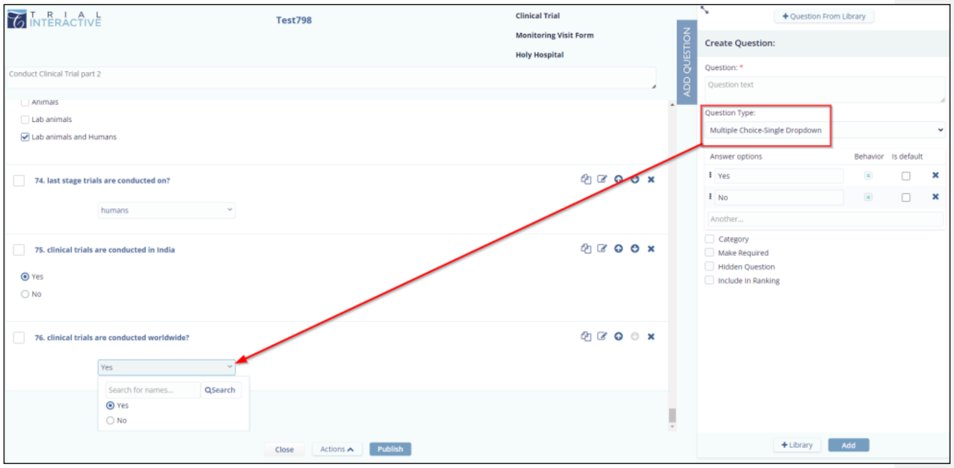
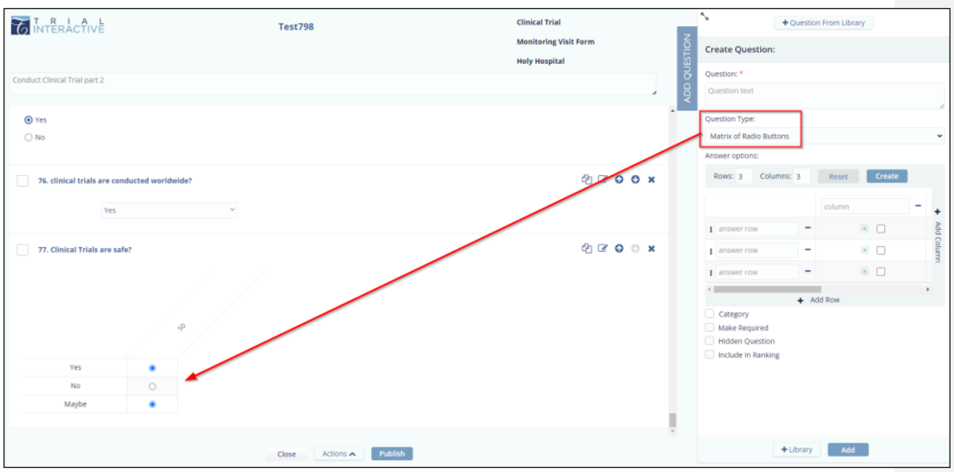
Question Type – Multiple Choice – Single Dropdown



Question Type – Matrix of Radio Buttons



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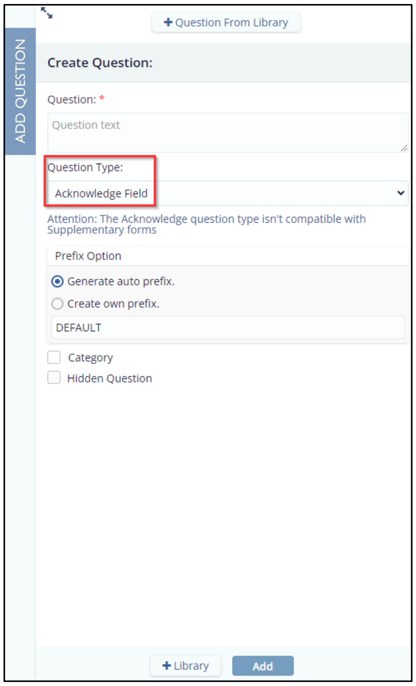
Question Type – Acknowledge Field



Refer section Checkboxes (step 3) for information of each checkbox.

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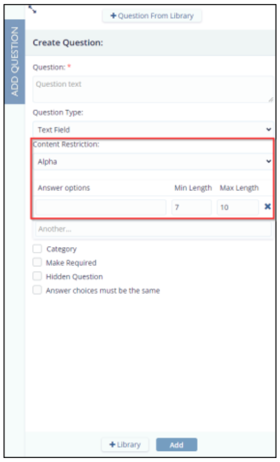
11.3.2 Adding Content Restriction

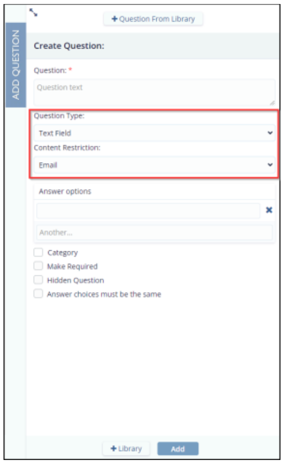
Content Restriction – Alpha

This allows the submitter to enter only symbols, spaces, period and commas within the provided length. Refer to the screenshot below.



Content Restriction – Email

This allows the submitter to enter only valid email id.



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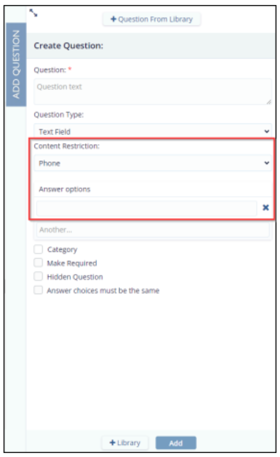
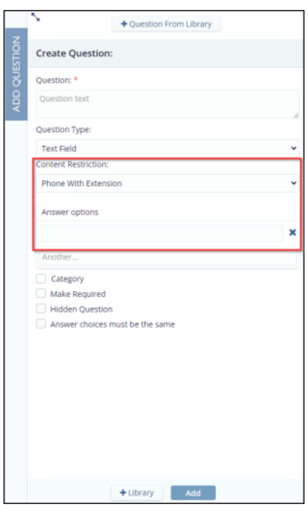
Content Restriction – Phone

This allows the submitter to enter phone number only in the format [XXX-XXX-XXX-XXXX].



Content Restriction – Phone with Extension

This allows the submitter to add the phone with extension.



Content Restriction – Number

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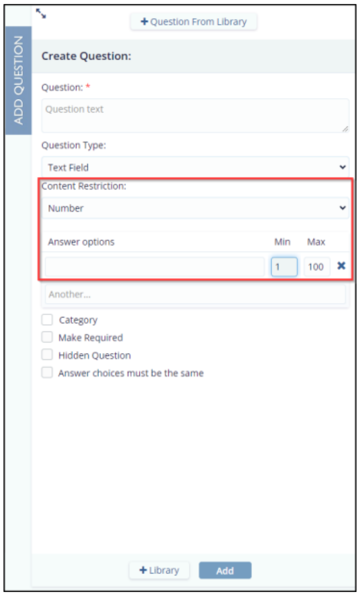
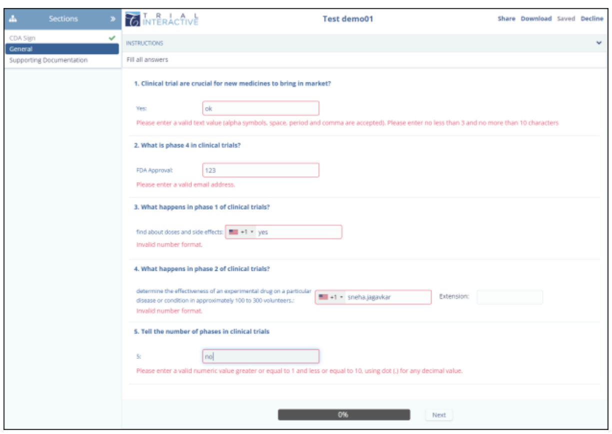
This allows the submitter to add numbers only within the provided range.



Below screenshot displays the errors with restrictions at the submitter end.



11.3.3 Adding Default Answers

A form when created by the Manager selects default answers, and publishes it. The submitter or the end user finds the default answers wrong, the answers can be changed by the end user.

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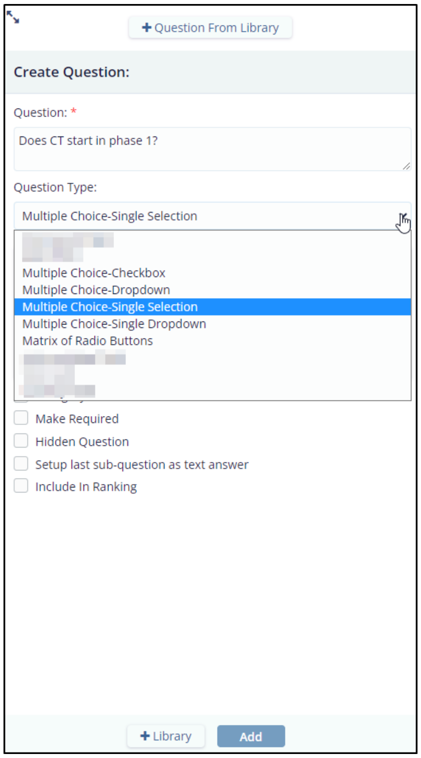
Note: While creating the questions, this option is not applicable to the - **Comments**, **Date**, **Acknowledge**, **Text** and **Country fields**.

Follow the steps below to set the default answers:

1. Click the **Add Question** button displayed in the right corner of the screen.
2. The **Create Question** window is displayed.
3. Manually enter the Question field mark with an asterisk (*).
4. Select any of the following options - **Multiple Choice-Checkbox, Multiple Choice-Dropdown, Multiple Choice-Single Selection, Multiple Choice-Single Dropdown**.



5. The Answer Options field displays three options with rows of **Behavior** and **Is Default**.
6. Select a checkbox for one option. Observe that the other options are disabled in 'Is Default' row. Refer to the screenshot below.

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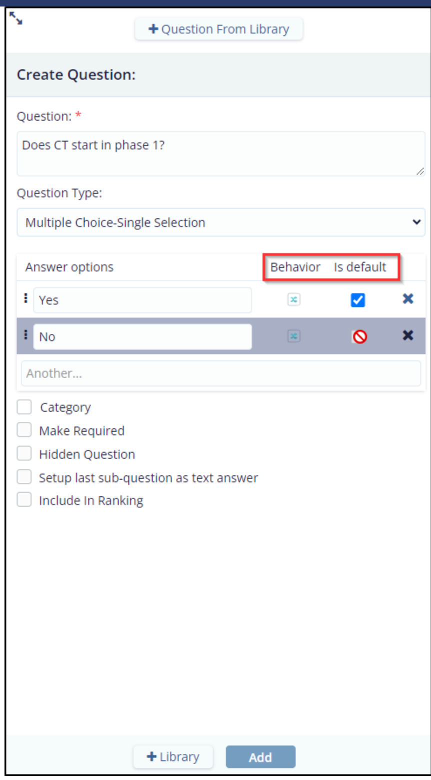

7. Click **Add** button displayed at the bottom of the window. The question is added in form. Refer to the screenshot below.

8. Click **Publish** button displayed in the center at the bottom of the screen.
9. The form when opened by the Submitter, disagrees with the default answer; they can change the answer and update the form and submit it. Refer to the screenshots below displayed at the Submitter's end.

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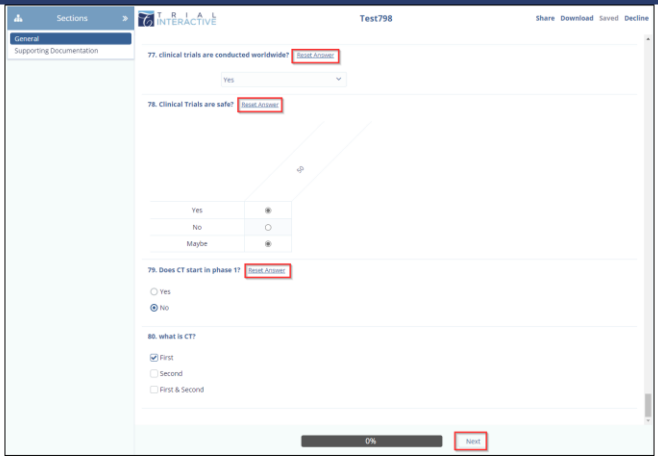

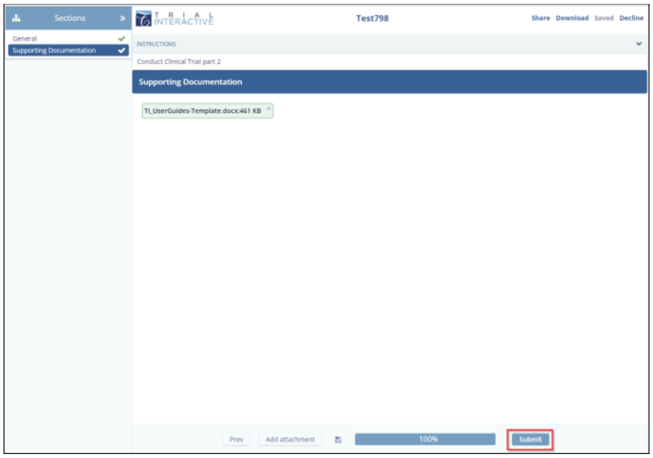

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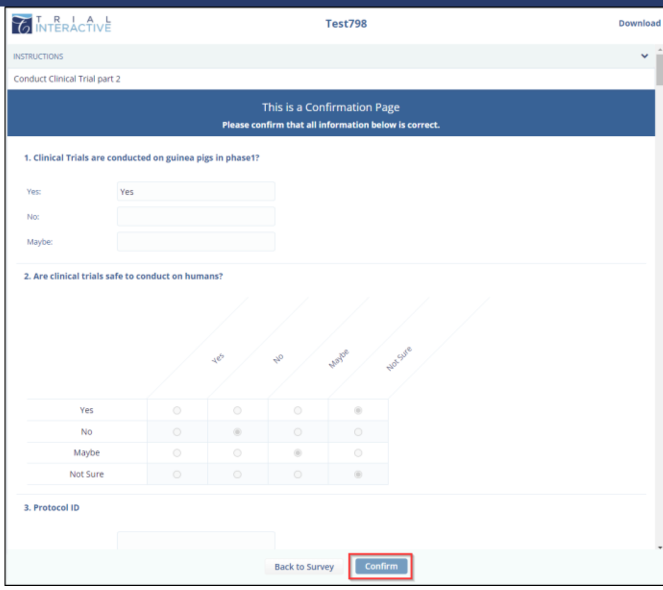

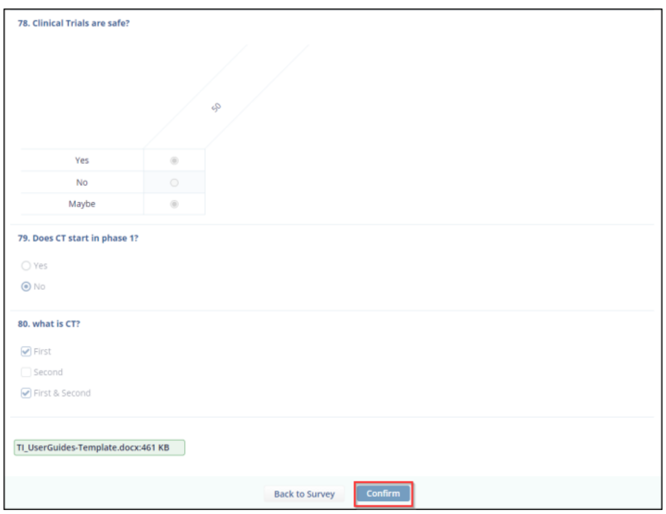

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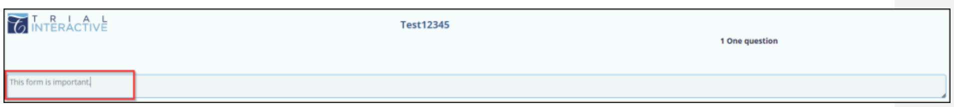
11.4 Editing Instructions

To edit the instructions:

1. On a Form Draft Page, hovers a mouse over the Instruction textbox. The Edit icon appears to the right of the textbox.
2. Click Edit. The textbox is enabled to allow you to edit the text.



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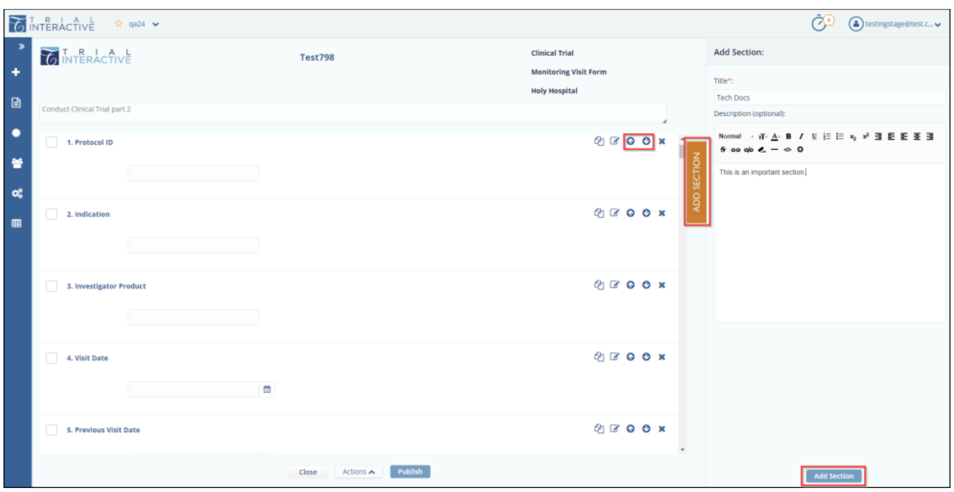
11.5 Adding Sections to a Form

To add sections:

1. On a Form Draft Page, click the Add Section tab on the right.

2. The Add Section tab contains the following options:
    a. Title: This allows adding the Title for the section.
    b. Description: This allows to add the description for the section is any
3. Enter the Title for the section.
4. Enter Description if any.
5. Click Add Section. Refer to the screenshot below.



Note: You can change the sequence of the section in the following ways:

1. Using Up and Down arrows
2. Drag-and-Drop the section to the required position.

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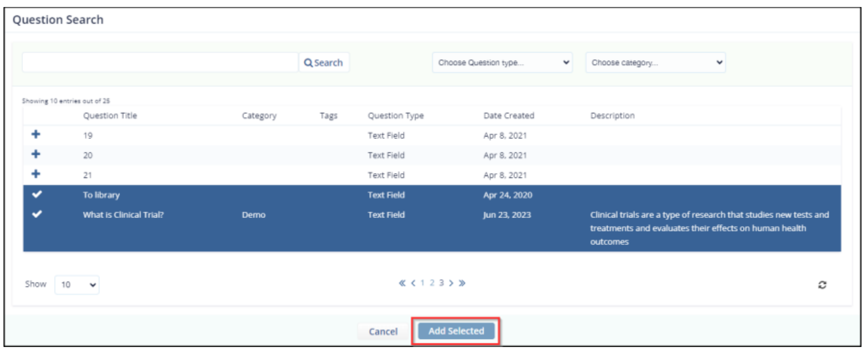
11.6 Adding Questions to Form from Library

To Add Questions to Form from Library:

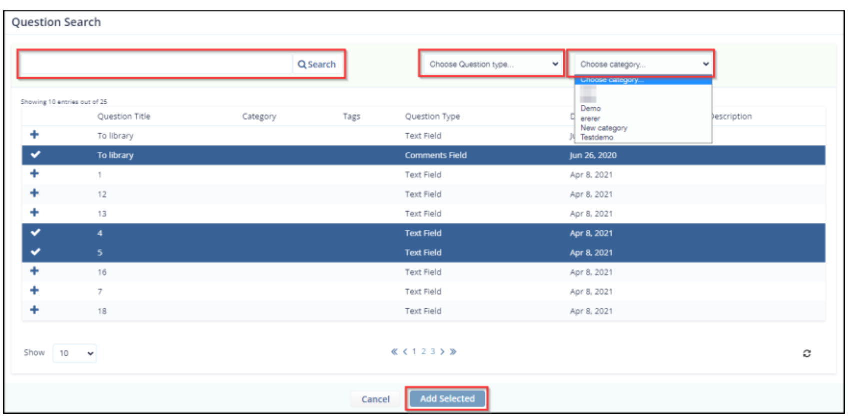
1. Click the Question From Library 

button from the Add Question tab. A Question Search dialog box displaying a list of questions opens.

2. Select questions and then click Add Selected to add them to a form. Refer to the screenshot below.



3. You can also search for questions depending upon the answer type and category as shown below.



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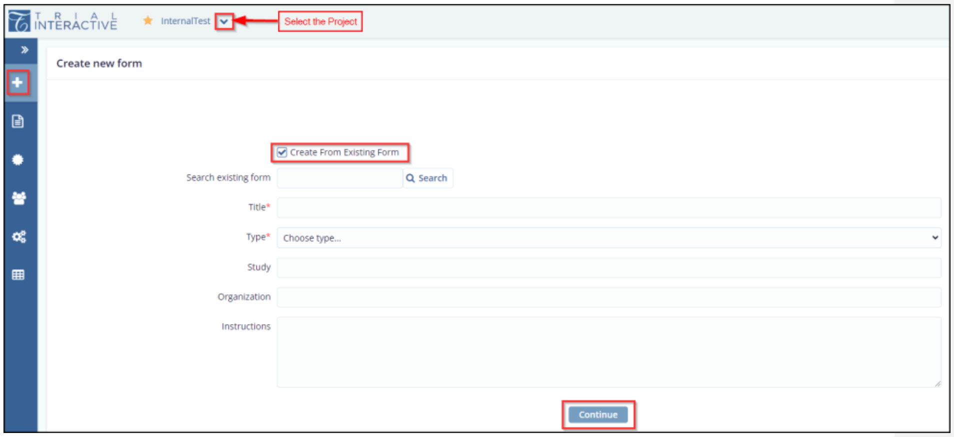
11.7 Cloning a Form

Cloning is creating a New Form from a list of existing forms. You can clone a Form that has been already saved to the library.

To clone a Form:

1. Open a required Project
2. Click New Form from the Menu Bar. A Create new form dialog box is displayed.
3. Select the Create from Existing Form checkbox. A Search existing from textbox appears.
4. Click the Magnifying (Search) Icon. The Form Search Dialog box opens listing all the forms.



5. Enter the Form Title in the search box or select a Form from the list which you want to clone.

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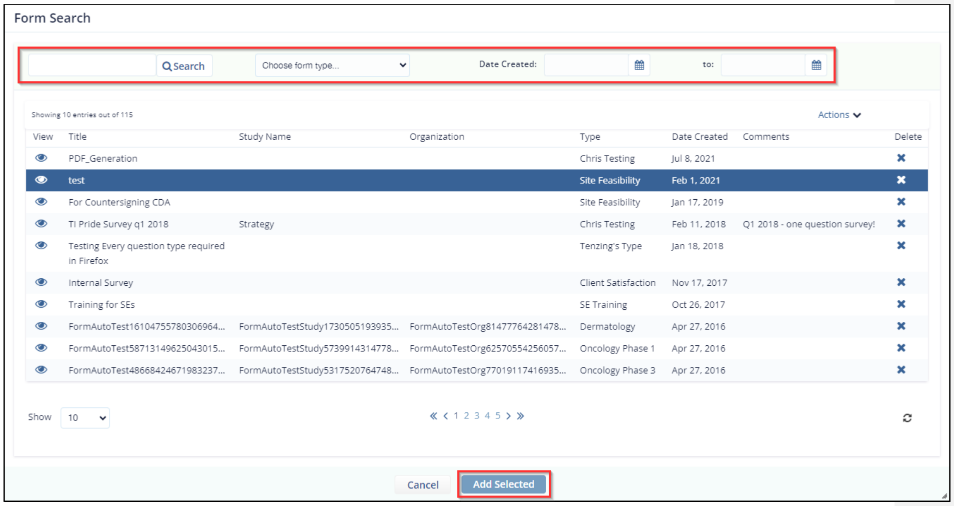
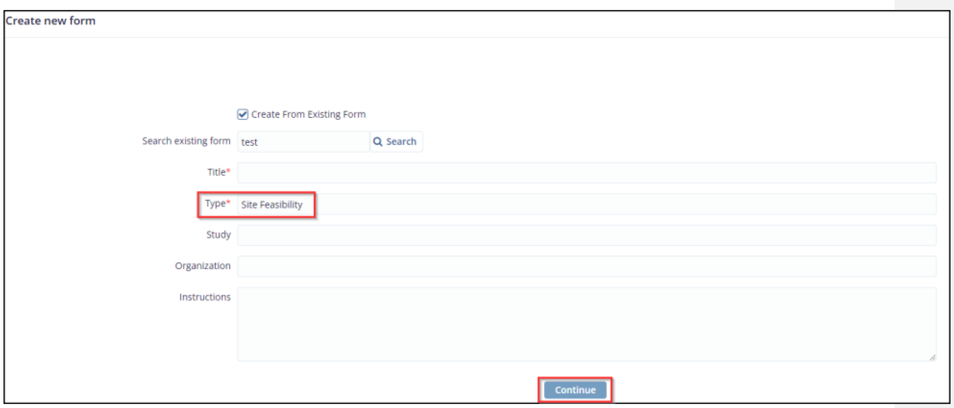
6. Click the Add Selected button to add all fields from the cloning form to the New Form. The Add Selected button is deactivated by default and activated only when the form is selected.



7. You are redirected to the Create New Form page. Notice that the selected Form Type appear in the Search textbox.

8. Enter all required fields on the Create New Form page and then click Continue. All fields from the cloned form are added to a New Form. Refer to the screenshots below.



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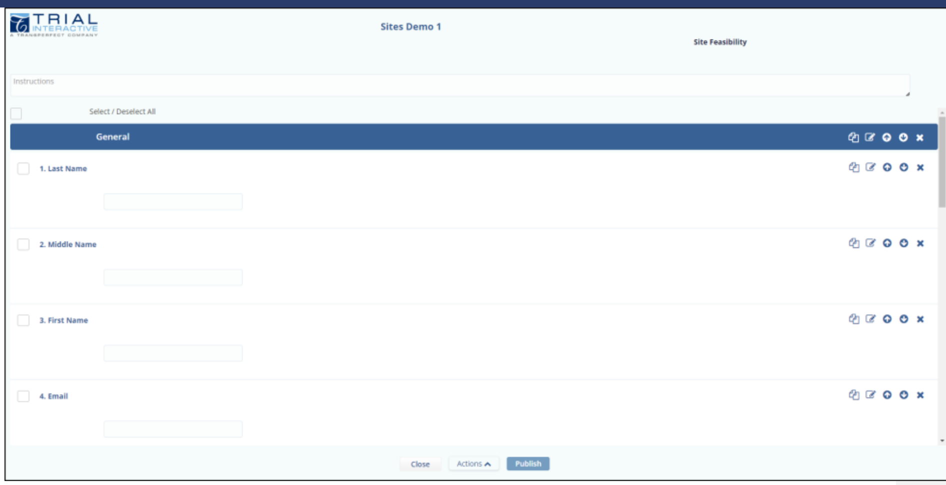
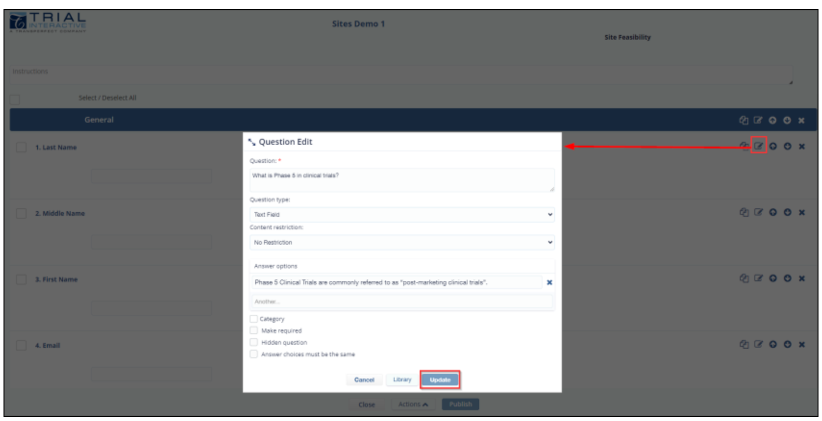


11.8 Editing the Question

To edit a question:

1. Click the Edit icon next to the question in a form you want to edit.
2. Edit the required details and then click Update to update and save changes to the form.



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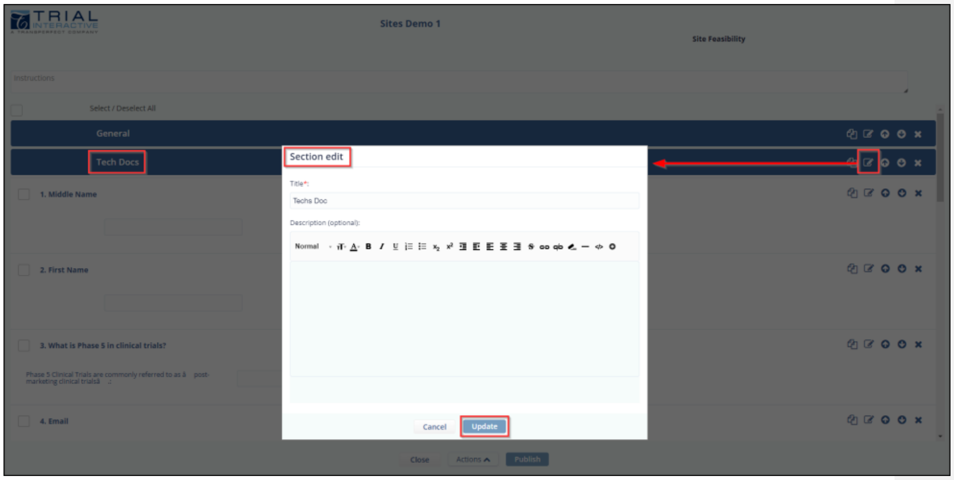
11.9 Editing the Section

To edit a section:

1. Click the Edit icon from the Section header. A dialog box opens.
2. Edit the Title and Description (optional) in a dialog box and then click Update to update and save changes to a form. Refer to the screenshot below.



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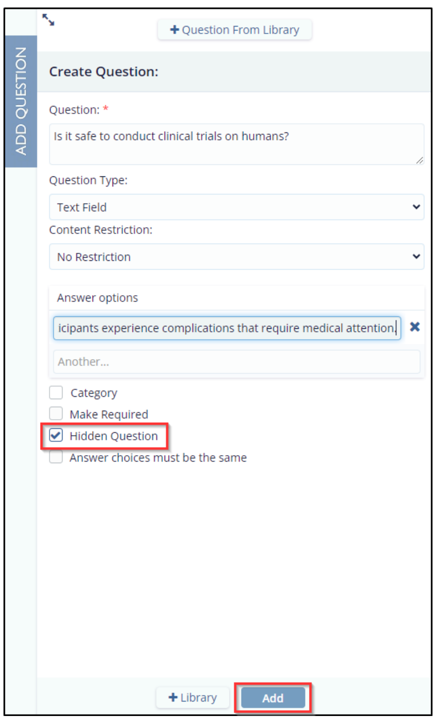
11.10 Making the Question Hidden

A survey can have some questions hidden, which are visible only on selecting specific Answer Option for the question.

Note: There should be at least one Multiple Choice Question to make the question hidden. Hidden Question is not applicable for Question Types other than Multiple Choice Questions visible in a survey.

To make the question hidden:

1. On the Form Draft Page, click the Add Question tab on the right.
2. Add questions to the Form.
3. Select the Hidden Question checkbox for the question, which you want to hide. Refer to the screenshot below.



4. This hidden question is invisible on the survey by default when the submitter opens it.
5. Click Add to add the question to the Form. The hidden question appears as Hidden next to the question. Refer to the screenshot below.

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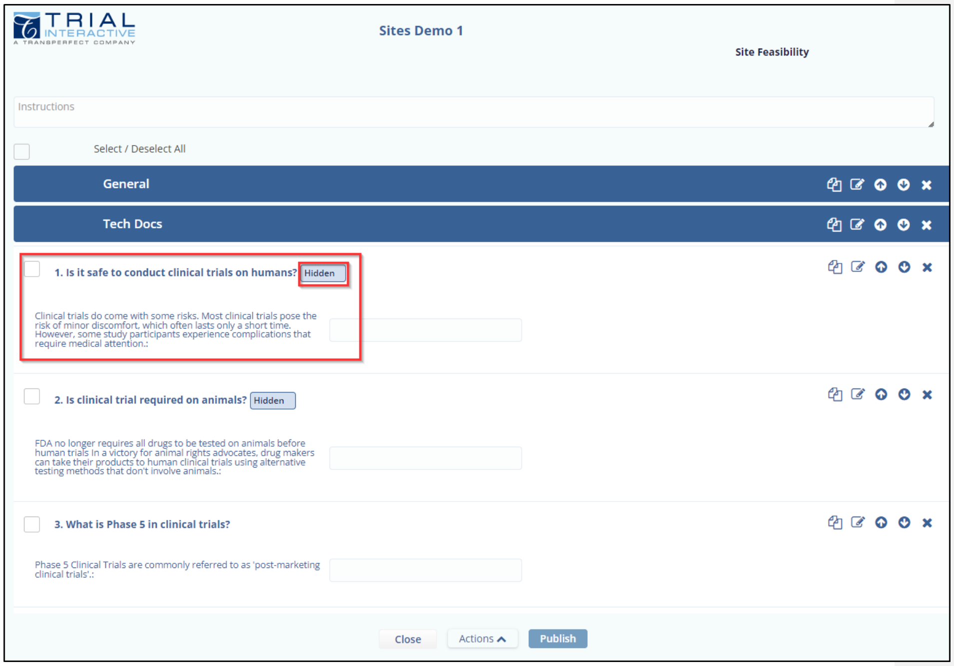

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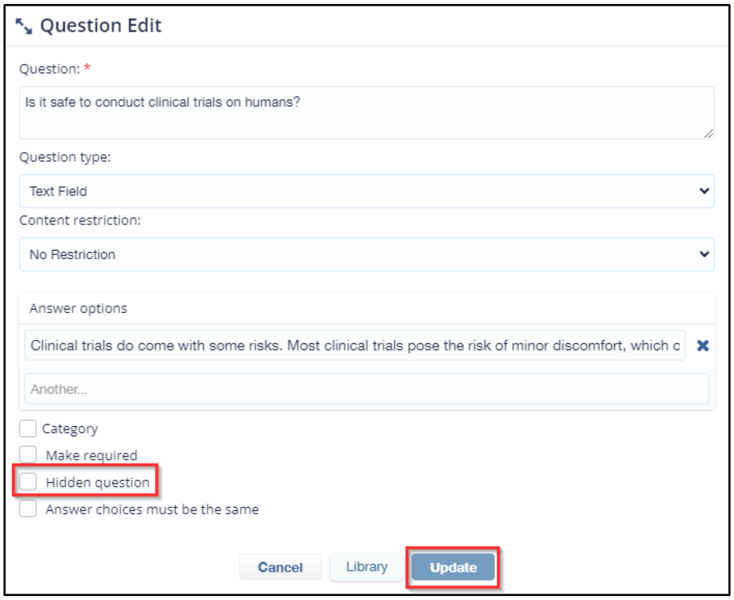
To make the question visible again, follow the steps below:

Note: The below steps are applicable only if the 'Question Type' is selected as the following options: **Comments Field**, **Date Field**, **Acknowledge Field**, **Text Field**, and **Country Field**.

1. Select the question that you want it visible. Click the Edit icon next to the Question. The Question Edit dialog box is displayed.
2. Unselect the checkbox next to Hidden Question. Click the Update button. Refer to the screenshot below.



3. The question is now visible to the user.

To make the question visible again, follow the steps below:

Note: The below steps are applicable only if the 'Question Type' is selected as the following options: **Multiple Choice-Checkbox**, **Multiple Choice-Dropdown**, **Multiple Choice-Single Selection**, **Multiple Choice-Single Dropdown**.

1. Click **Edit** icon next to the Question to which you want to apply logic to make the Hidden Question visible. The Edit Question popup window is displayed.
2. Click the Behavior icon next to the answer option for which you want to make the hidden question visible. Refer to the screenshot below.

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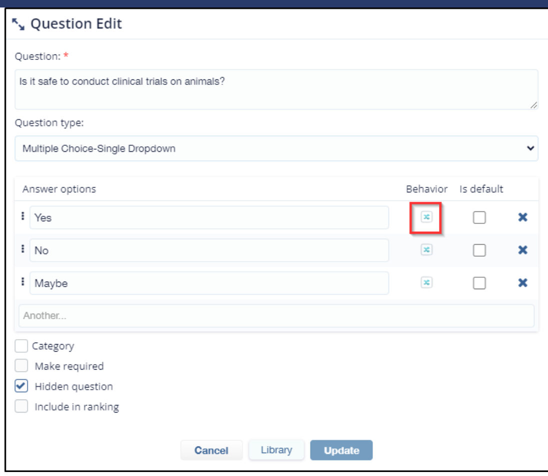
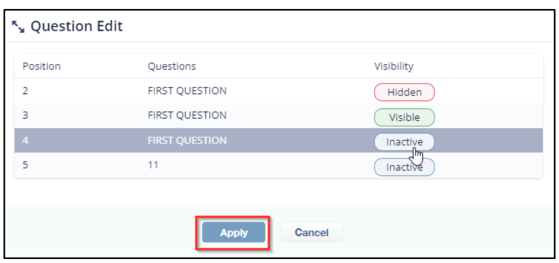


3. A dialog box opens which displays the following:
    1. **Position**: The position of the question.
    2. **Questions**: Available questions in the Form.
    3. **Visibility**: The options Visible and Hidden to change make the question hidden.



4. Notice that the Hidden Question displays the Visibility as Hidden.
5. Click Hidden button next to hidden question. The Hidden button changes from Hidden to Visible. Similarly, you can also hide other questions by changing the visibility of the question.
6. Click **Apply**. Refer to the screenshot below.
7. You are redirected to the Edit Question page.
8. Click **Update** to save the changes. You are redirected to the Form Draft Page.
9. Unselect the checkbox of Hidden Question.

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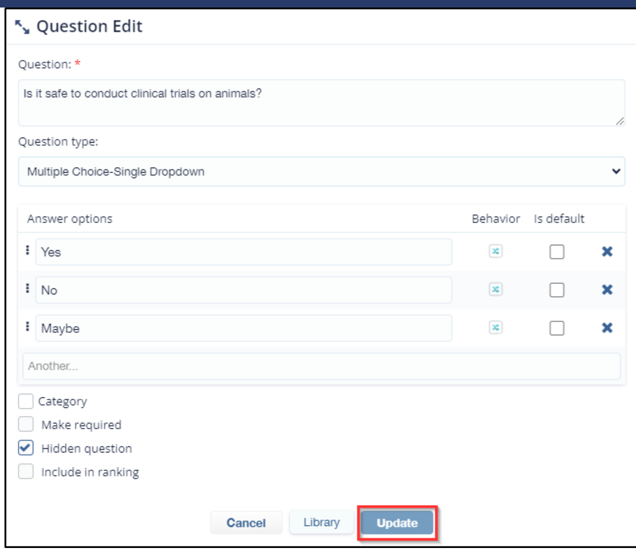

10. Click **Publish** and send the survey to the submitter. When the submitter opens the survey and selects the option, the hidden question is visible as per the logic specified. Below is an example of hidden question.

Matrix of Radio Buttons

This option is displayed in the Question Type field dropdown while adding a question to the form. Refer to the screenshot below.

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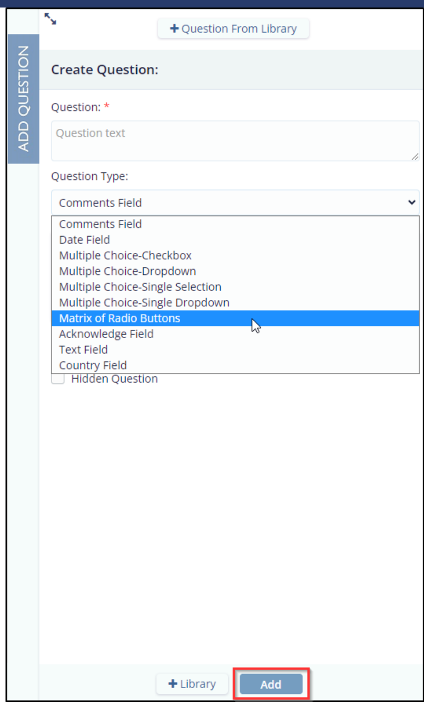
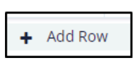


Follow the steps below to add matrix of radio buttons option:

1. Select the **Matrix of Radio Buttons** option from the Question Type field and click **Add**.
2. The Create Question window is expanded and displayed in full screen.
3. Enter the question in the Question field that is marked with an asterisk (*).
4. (Optional) Click the **Add Row**  and **Add Column**  buttons displayed on the screen to add rows and columns. By default, 3 rows and 3 columns are displayed. Refer to the screenshot below.

5. You can also manually set the rows and columns by entering the values in the rows and columns fields displayed in the left corner.

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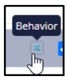
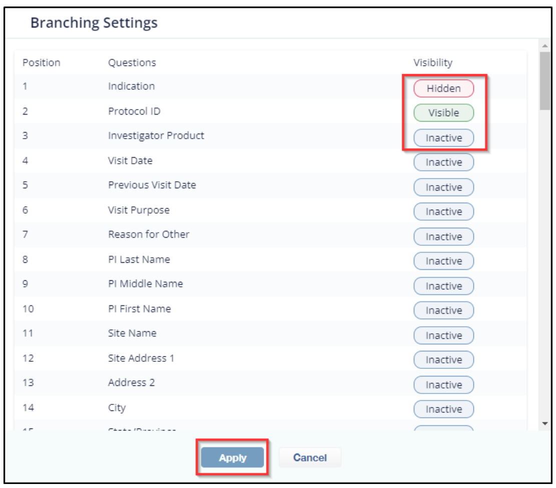
- Enter the values in the Rows and Columns field and click Create. Refer to the screenshot below.
- Click **Approve** in the Warning! popup window that is displayed. Refer to the screenshot below.
- The rows and columns are added to the form.

6. Click the **Behavior** 

icon to view and select the visibility of the questions.
   a. **Position**: The position of the question.
   b. **Questions**: Available questions in the Form.
   c. **Visibility**: The options **Visible**, **Hidden** and **Inactive** to change make the question hidden. Refer to the screenshot below.



7. Select the visibility of the question by clicking the **Invisible** button. Refer to the above screenshot.
8. Click **Apply**. You are redirected to the Question Edit popup window.
   Note: To select a checkbox for an answer, Only one answer per row and per column can be selected.
9. Click **Update**. The question with matrix radio buttons is displayed in the form. Refer to the screenshot below.

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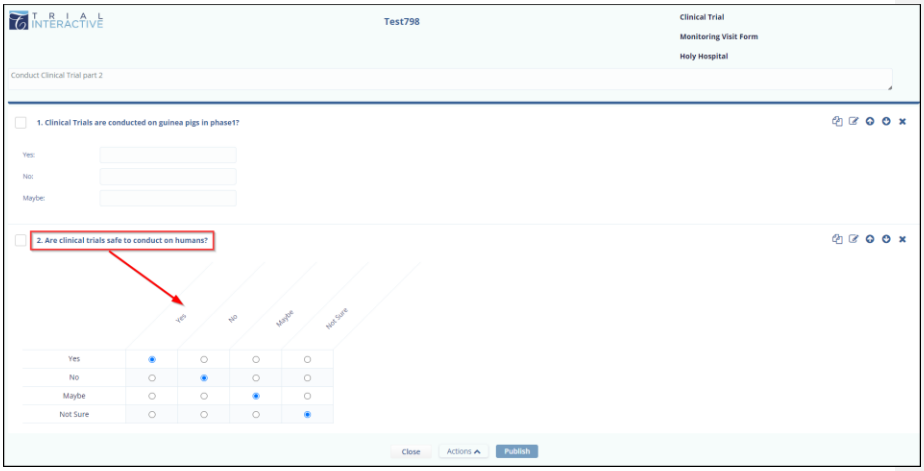

10. The answer options can be selected as default options. If you want to add default answer - select checkbox or unselect it to cancel default answer. Only one answer option per row and per column can be selected.

Note: The option 'Matrix of Radio Buttons' for Question type field cannot be selected or edited for the questions that are already created in the form.

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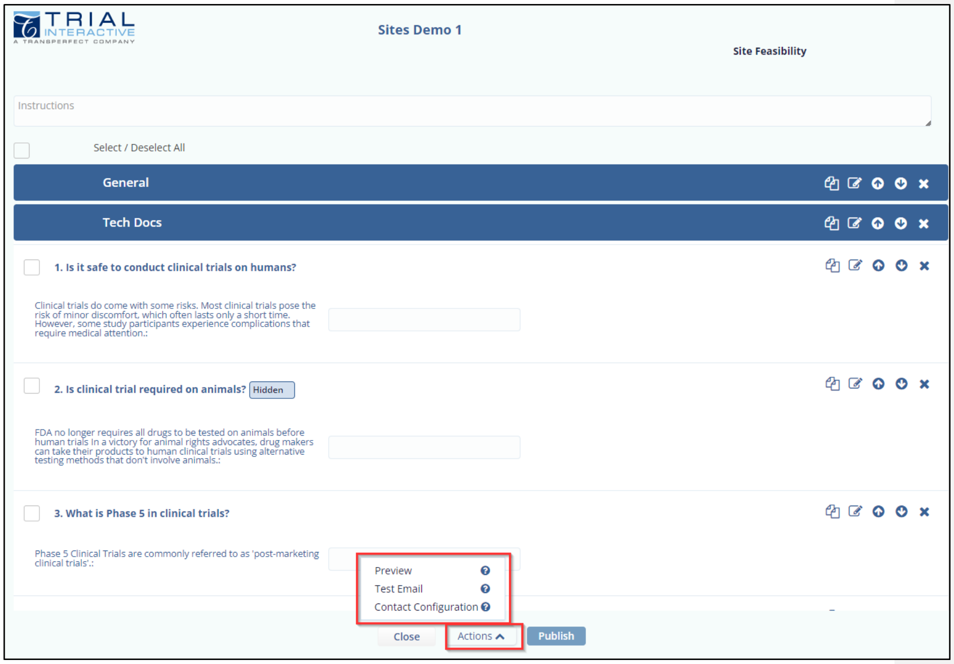
12. Actions on Forms before Publishing

There are certain actions that a user can perform on the forms before publishing it. Refer to the screenshot below.



The Form Draft page provides the following options before publishing it.

- Previewing Forms
- Test Email
- Contact Configuration

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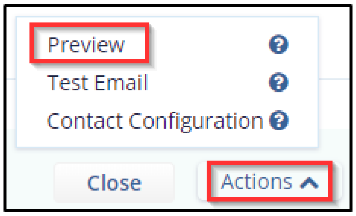
12.1 Previewing Forms

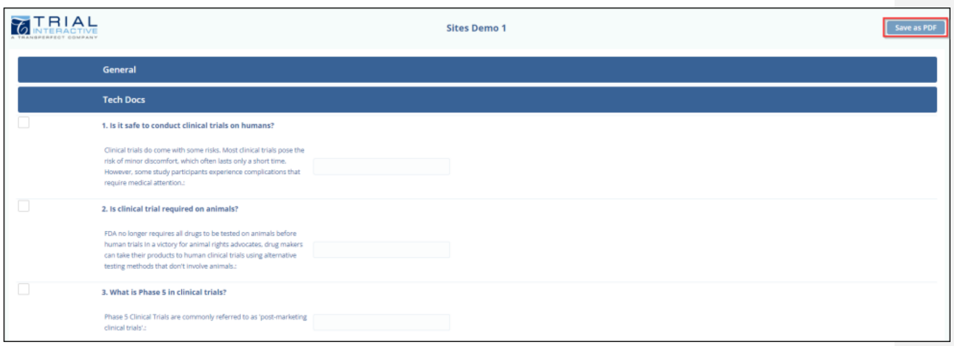
Preview provides an overview of the created form before publishing.

To preview a Form:

1. Click Actions on a Form Draft page displayed at the bottom of the screen.
2. Select Preview from the pop-up window. This will display a Form preview with all the fields in it.



3. You can also save the form by clicking the Save as PDF button from the Form Preview page. Refer to the screenshot below.



Note: The user cannot make any changes in the form while previewing.

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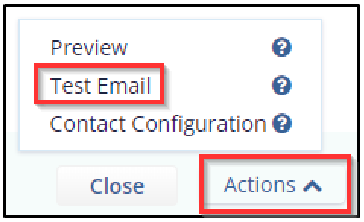
12.2 Test Email

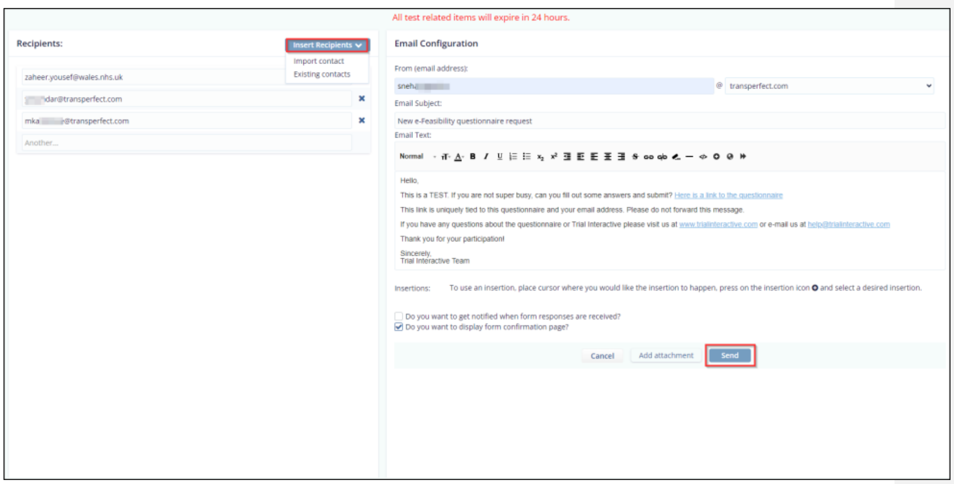
Test Email allows you to send a test mail when a survey is created. You can send a test mail to single or multiple receivers. The template for this email is defined in Templates.

To send a Test Email:

1. Click Actions on the Form Draft page.
2. Select Test Email from the pop-up window. This opens Email window.



3. Add Recipients and then click Send to send a Survey.
4. You can also select Recipients by importing them or from Existing Contacts from the Insert Recipients dropdown. To know more on this, refer section Send Survey.



Note: All test related items will expire within 24 hours after receiving an email.

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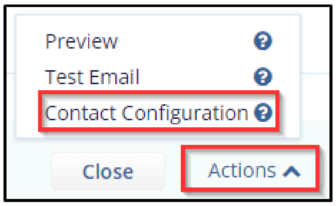
12.3 Contact Configuration

Contact configuration allows you to map Question Types related to the Contact information with the corresponding Custom Contact Fields. When a form is sent to the submitter, these mapped contact fields are pre-populated in the form making all mapped fields non-editable.

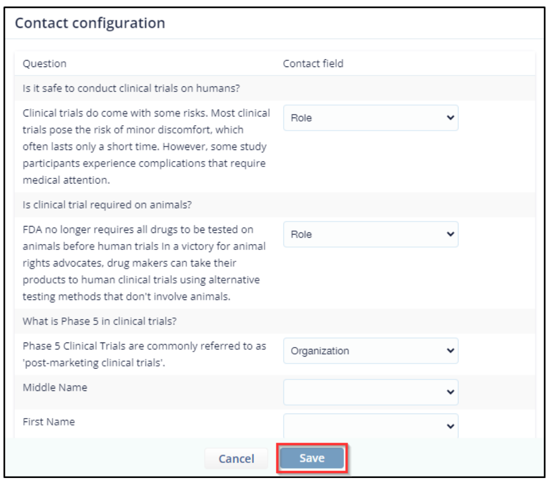
When a response is sent by the submitter, the Contact information is saved, and the survey is visible to the manager in the Contacts tab from the Menu Bar.

To map the Contact information:

1. Click Contact Configuration option from Actions dropdown displayed at the bottom of the window on the Form Draft page. Contact Configuration dialog box appears which displays Questions and Contact field dropdowns.



2. Setup the mapping between Question and Contact fields.
3. Click the Save button to map the fields.



Note: The fields mapped here are displayed in the General> Contact Mapping Schema of the form.

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13. Publishing Forms

You can publish a form when all questions and sections are added to it. Once the form is published, the user can then send a survey to the submitter.

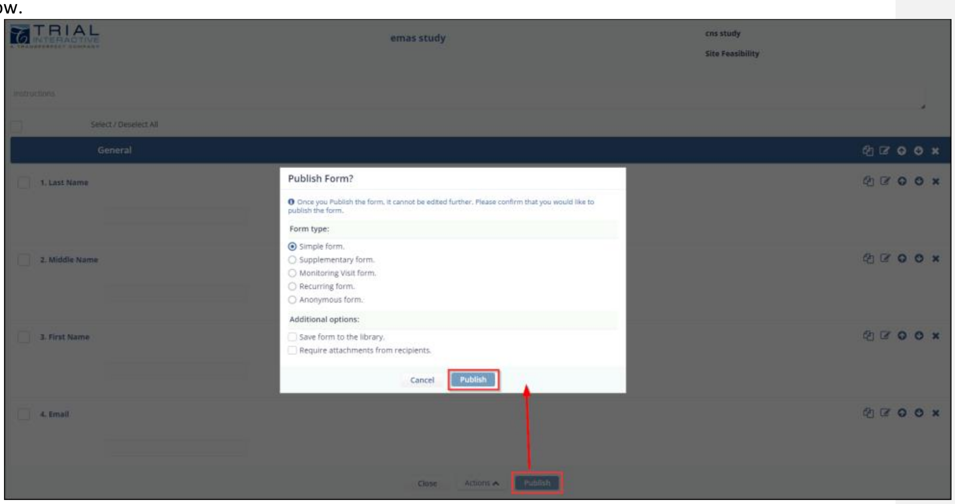
To Publish a Form:

1. Click the Publish button in the Form Draft page displayed at the bottom of the screen. The Publish Form? dialog box opens which displays a message asking for confirmation to publish form along with the following form types:
    - Simple Form
    - Supplementary Form
    - Monitoring Visit Form
    - Recurring Form
    - Anonymous form

And Additional options with checkboxes

- Save form to the library
- Require attachments from recipients

Select the required checkbox and then click the Publish button to publish the form. Refer to the screenshot below.



- The Form Statistics Page opens which displays an overview of the form. You can also visit this page by clicking the Form Title from the Form Dashboard. Refer to the screenshot below.

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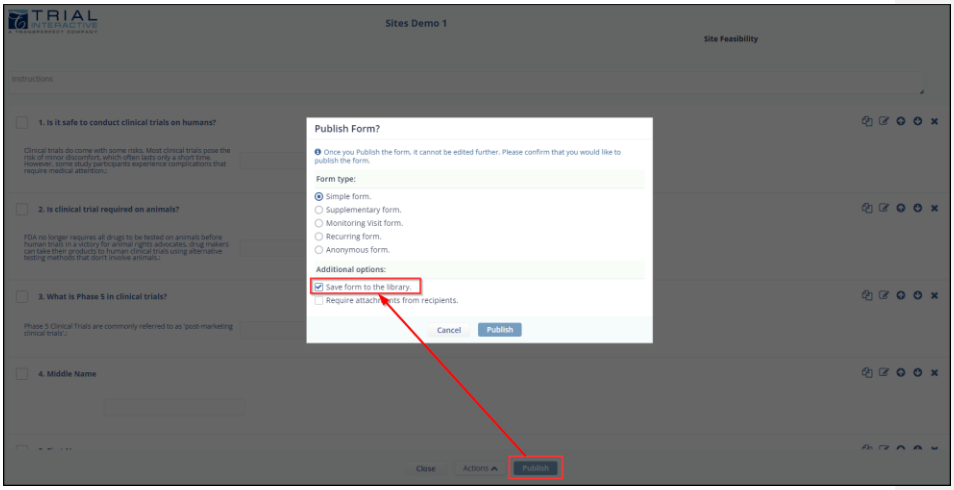
Note: You cannot edit a form after it is published.

13.1 Save Form to the Library

This allows you to save the published form to the Library. You can view and open these forms to send for the response from a library. Refer to the screenshot below.



13.2 Require Attachments from Recipients

Selecting Require attachments from recipients on a Publish Form dialog box restricts the submitter to submit the questionnaire without the attachment.

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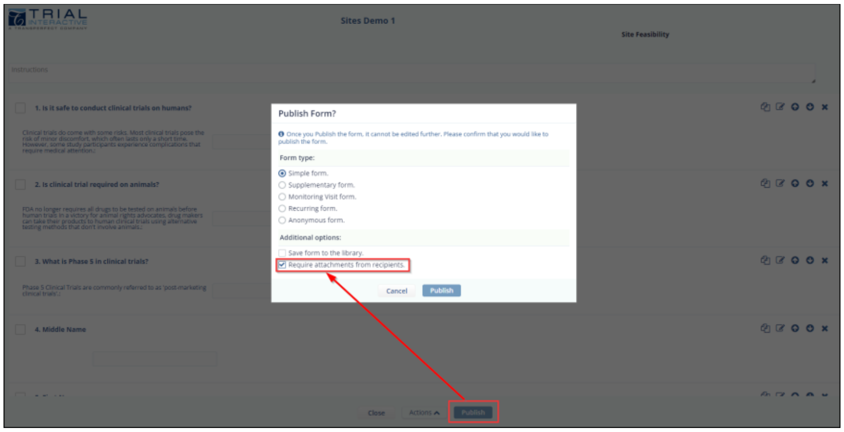
When this option is selected, the Do you want to require attachments form submitter? Checkbox is selected by default on an Email Page while sending a survey. Refer to the screenshot below.



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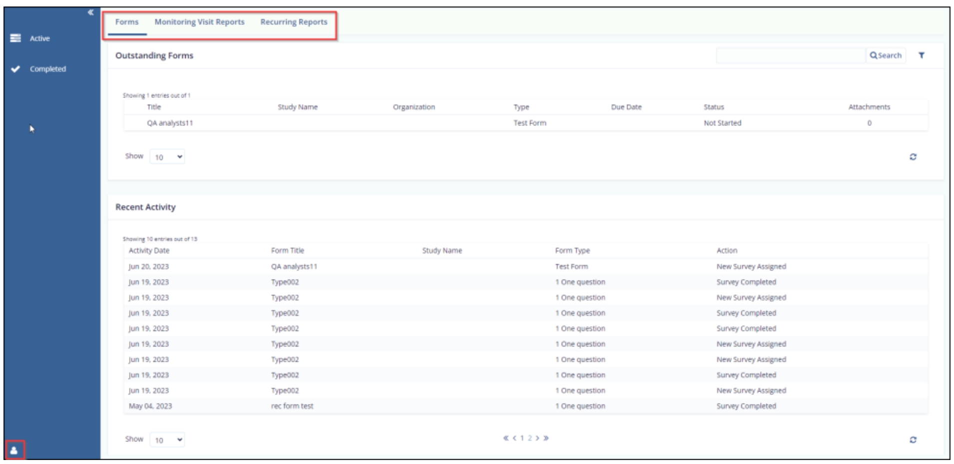
13.3 Monitoring Visit

Selecting **Monitoring Visit Form** radio button on a **Publish Form?** Popup window leads the Manager to the **Form Overview Page**.

Click the **User Profile** 

icon displayed at the bottom left corner and select the **Submitter** option to view the **Monitoring Visit Report Dashboard** that includes **Forms**, **Monitoring Visit Reports and Recurring Reports** tabs of his/her account. Refer to the screenshot below.



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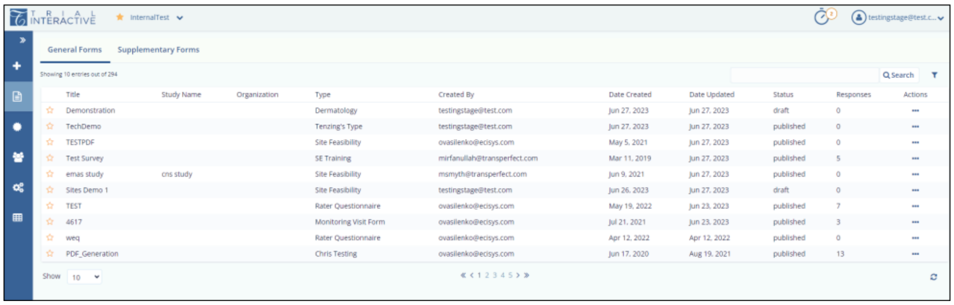
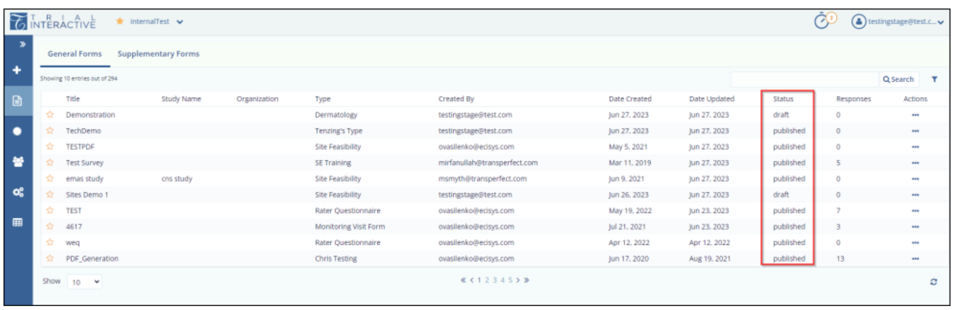
14. Viewing Forms

This section describes the form view in the application.



14.1 The Form Dashboard

The Form Dashboard displays the list of all Published, Draft and Closed Forms.



The Form Dashboard provides the following:

- Searching for Forms
- Filtering of Forms
- Refreshing Forms page
- Pagination in Forms Dashboard
- Editing a Draft Form

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14.2 Searching for Forms

To search a form:

1. The search bar is displayed at the top right corner of the page.
2. Enter the Form Title and hit Enter. The table displays a list of all forms containing the search text. Refer to the screenshot below.

3. Click the Cross  icon that appears in the search box to edit the search criteria.

14.3 Filtering of Forms

Filtering allows you to search forms depending upon the applied filters.

To filter Forms:

1. Click the Filter 

icon at the top right corner of the page. A textbox below each column appears to allow you to filter Forms.
2. Apply required filters to search for a Form. The forms are displayed as result.

14.4 Refreshing Forms Page

Refreshing a Forms page resets all the changes and settings made to the page. To refresh a Form page, click Refresh  icon at the bottom right corner of a Forms page. Refer to the screenshot below.

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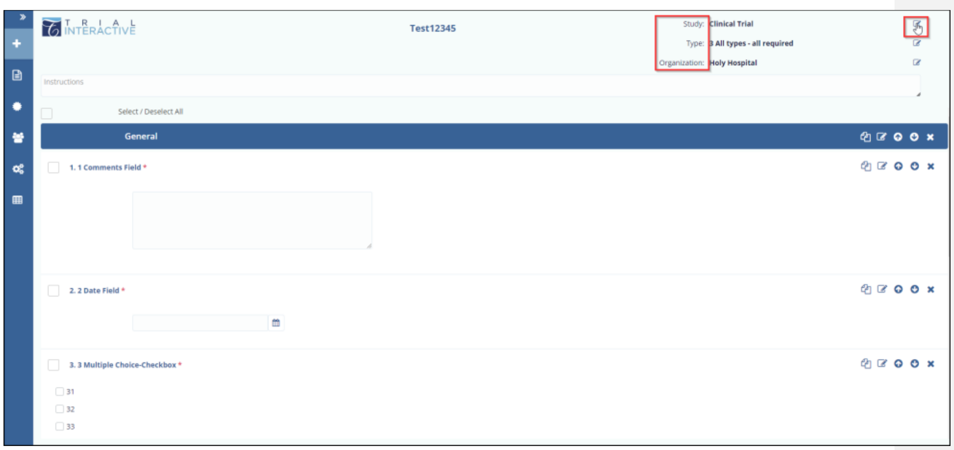
14.5 Editing a Draft Form

Newly created forms are saved as draft before publishing them. You can edit these draft forms later as required.

14.5.1 Changing the Study, Type and Organization of a Form

To edit Study, Type and Organization:

1. Open a Form to edit.
2. Hover the mouse to the top right corner of the screen to view the Study, Type and Organization of the form. Refer to the screenshot below.



Note: The fields – Study, Type and Organization are visible only after the mouse is hovered in the top right corner.

3. Hover the mouse over the Study field to edit. This enables the Edit  icon next to the field.
4. Click the Edit icon. A textbox next to the Study field appears.

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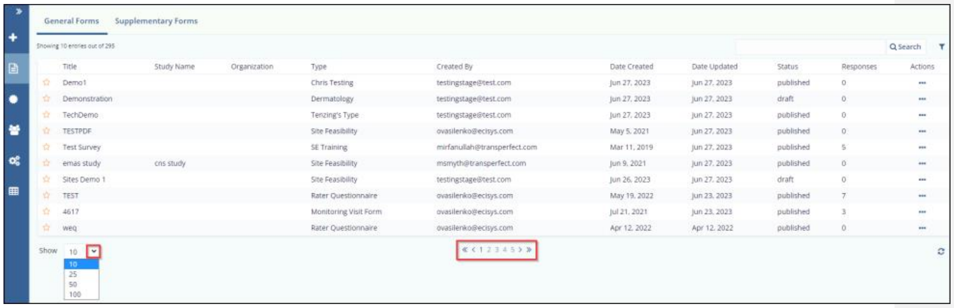
5. Edit the field and hit Enter. This saves the changes to the Form.
6. Similarly, you can edit the Type and Organization fields.

14.6 Pagination in Forms Dashboard

Pagination allows you to manage/change the number of entries of forms that appear on a Form Dashboard.

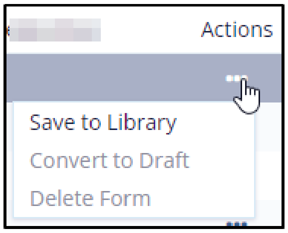
To change the number of entries of Forms:

1. Click the **Show** dropdown at the bottom left corner of the page.
2. Select the number of entries from the list to appear on the Forms Dashboard.
3. You can also switch pages to view further list of Forms by clicking the numbers between the arrows. A single arrow navigates the user to the previous page (<) or next page (>) whereas the double arrow navigates the user to the very first page (<<) or very last page (>>). Refer to the screenshot below.



14.7 Actions on Forms

The user can perform certain actions on the forms that display both 'Published' and 'Draft' status. Refer to the screenshot below.



The user can perform the following actions on a form:

a. Save to Library
b. Convert to Draft
c. Delete Form

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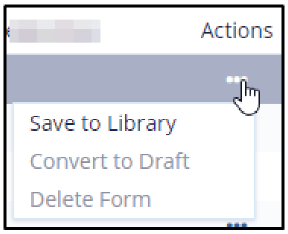
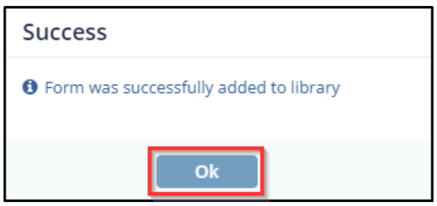
14.7.1 Save to Library

The user can save a published form to the library.

i. Click the **ellipsis** (three dots menu) in the Actions tab.
ii. Select the **Save to Library** option.
iii. A popup window displays a notification – Form was successfully added to Library. Refer to the screenshots below.





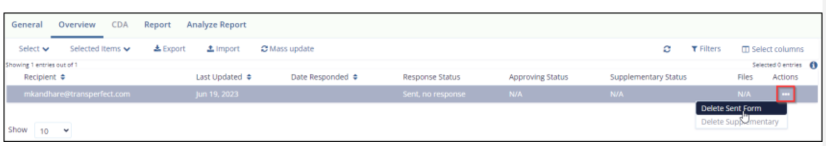
14.7.2 Convert to Draft

The Convert to Draft option is enabled only when the form is published but not sent to any recipient. Once the form is published and sent to the recipient it cannot be converted back to draft status.

14.7.3 Delete Form

The Delete Form option is enabled only when the form is not sent to any recipient. To delete the form with recipients first delete the recipients and then delete the form. Follow the steps below to delete a recipient and then the form:

1. Select a form that displays the 'Published' status and has recipients attached to the form.
2. The Form Overview page is displayed.
3. Click the **ellipsis** (three dots menu) in the Actions tab.
4. Click **Delete Sent Form** option. Refer to the screenshot below.



5. The Delete Sent Form popup window is displayed.
6. Enter the reason for deletion in the field marked with an asterisk (*). Refer to the screenshot below.

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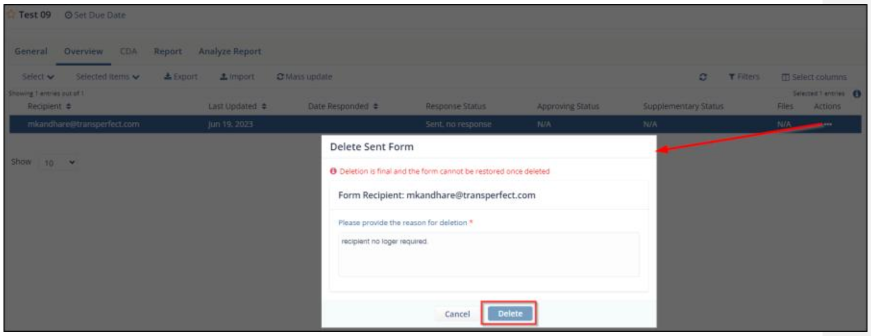

7. Click **Delete**.
8. Click on the **Forms**  icon on the left pane.
9. Click the **Refresh**  icon displayed at the bottom right corner in the General Forms tab.
10. The actions conducted on the latest form is displayed first in the list.
11. Click the **ellipsis** (three dots menu) in the Actions tab.
12. Click **Delete Form** option. Refer to the screenshot below.

13. The Delete Form popup window is displayed.
14. Enter the reason for deletion in the field marked with an asterisk (*). Refer to the screenshot below.

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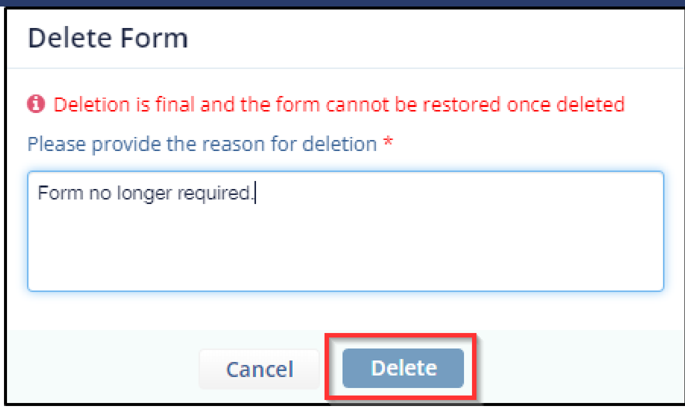

15. Click **Delete**. The form is deleted.

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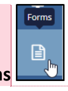
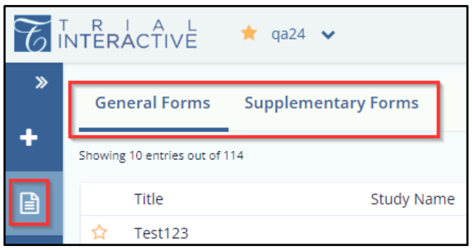
14.8 Supplementary Forms

Supplementary Forms are forms that are added to a Parent /General form. Click the **Forms** 

icon to view the General and Supplementary forms in the grid (in the center of the screen).

Commented [SJ1]: Anuj, please check this section.



The user can **Create**, **Approve**, **Reject**, and **Submit** a Supplementary Form. The user can also save the form as PDF if required.

Note: Once a supplementary form is rejected by the user it is no longer seen in the application. The user has to create a new supplementary form to send to another user.

There are two ways to create a Supplementary form:

16. Create new form
17. Attach supplementary form to an existing form.

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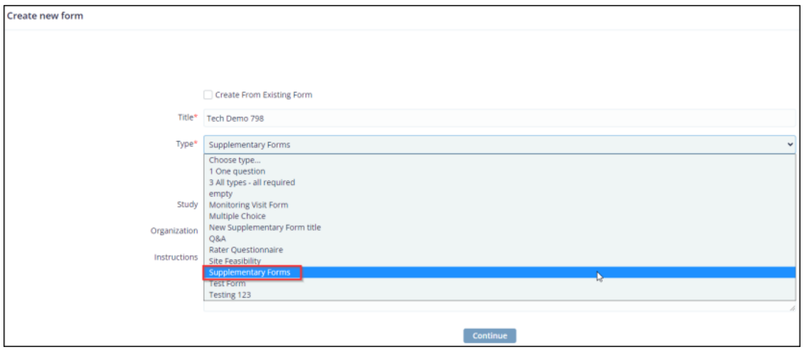
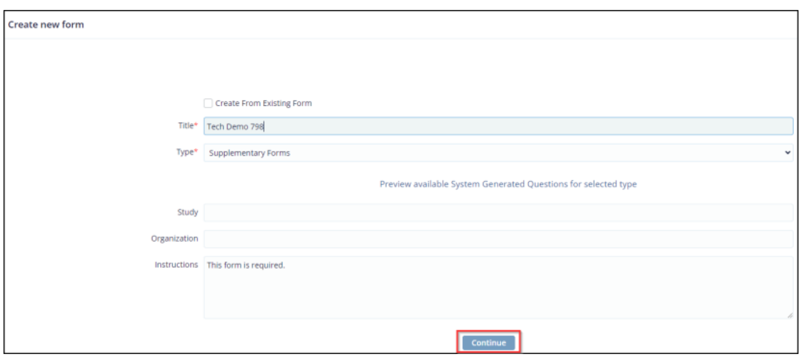
14.8.1 Create a New Supplementary Form

Click the New Form icon displayed in the left panel. The Create New Form window is displayed.

1. Enter the **Title** for the new form to create. Field is marked with an asterisk (*).
2. Select the **Type** of form as 'Supplementary' from the dropdown menu. Field is marked with an asterisk (*). Refer to the screenshot below.



3. Click the **Preview available System Generated Questions for selected type** button displayed below the Type field. You can edit the form by clicking the **Edit** icon displayed at the right corner for each field.
4. (Optional) enter the details for the fields – **Study**, **Organization**, **Instructions**.
5. Click **Continue**.



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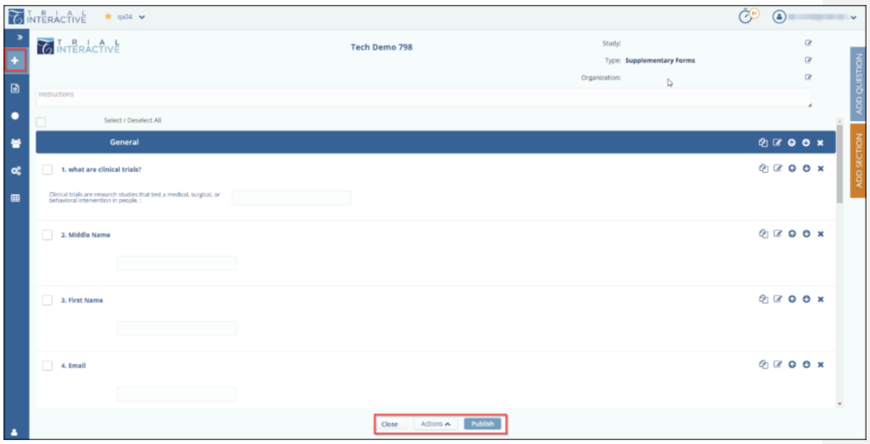
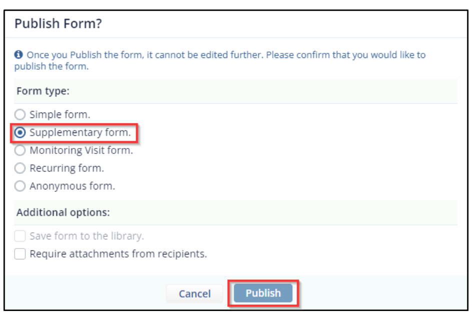
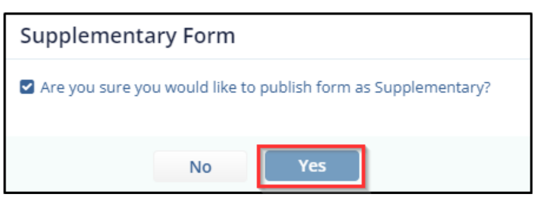
6. The form opens in the grid with all the details filled.
7. Click the **Publish** button displayed at the bottom of the screen. You can add a question and a section to the supplementary form by clicking the buttons – Add Question and Add section displayed vertically in the right corner.



8. Select the **Supplementary Form** radio button in the Publish Form? Pop up window.



9. Click **Yes** in the Supplementary Form popup window.



10. The form is displayed under the Supplementary Forms in the grid.

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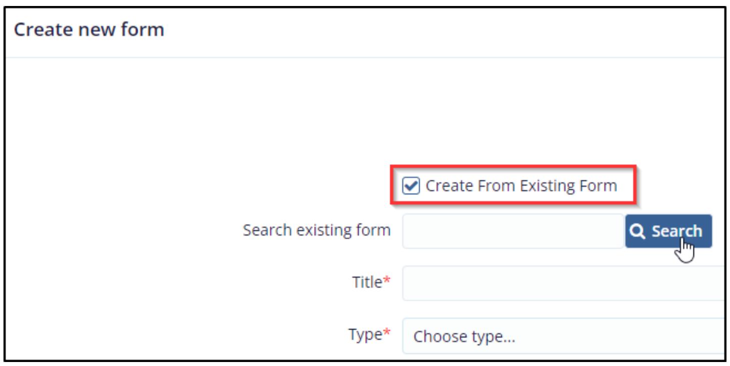
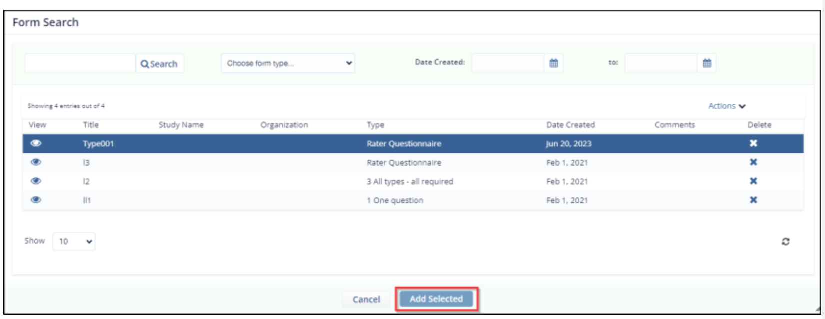
To Create from Existing Supplementary Form

1. Select the checkbox of 'Create from Existing Form' displayed at the top of the new form.



2. Click the **Search** button to open the form Search popup window.
3. Select a form from the list of available forms. You can also search for a form in the search bar and apply the required filters like date and type if required.
4. Click **Add Selected**.



5. The selected form is displayed in the Search Existing Form field. Refer to the screenshot below.

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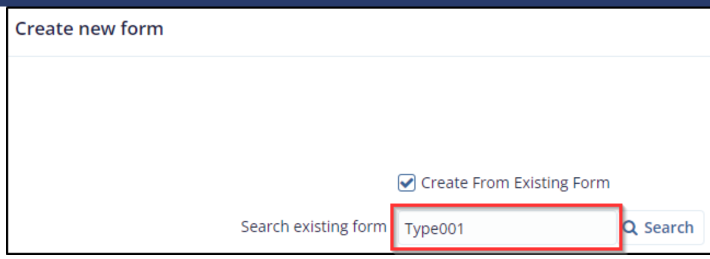
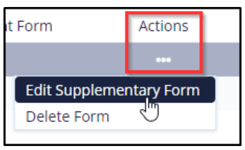
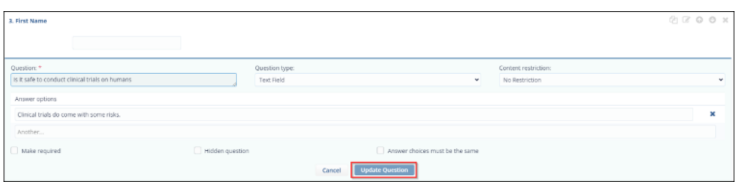


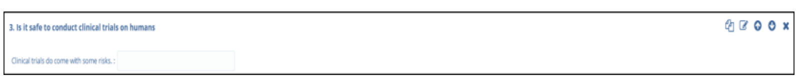
To Edit Supplementary Form

1. Click the three dots (ellipsis) displayed in the actions column for each form.
2. The **Edit Supplementary Form** and **Delete Form** options are displayed.
3. Click the **Edit Supplementary Form** option to make changes in the form.



4. Again, each field has an **Edit** icon to make changes in the form. Click **Update Question** to reflect changes in the selected question, or **Cancel** to not make any changes in the selected question.





5. Click **Close** button displayed at the bottom of the screen after the changes are made. Refer to the screenshot below.

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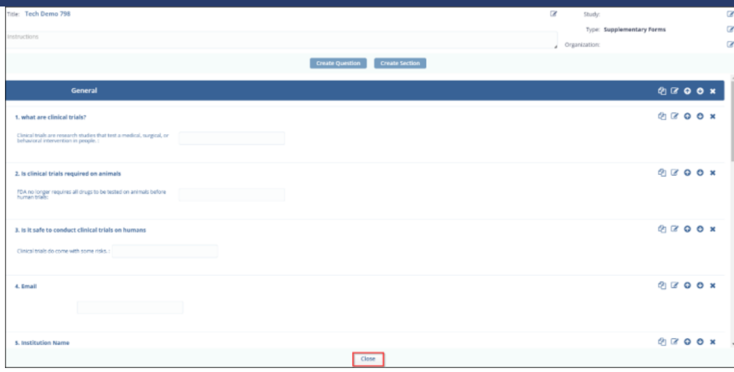
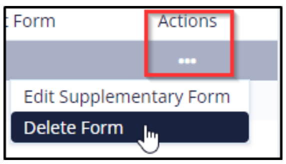
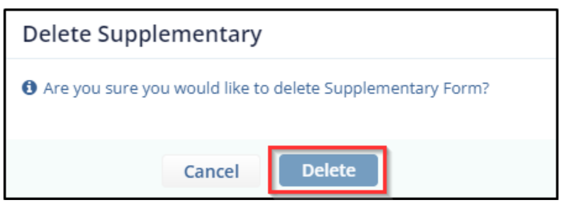


To Delete Supplementary Form

1. Click the three dots (ellipsis) displayed in the actions column for each form.
2. The **Edit Supplementary Form** and **Delete Form** options are displayed.
3. Click the **Delete Form** option.



4. A Delete Supplementary popup window is displayed with the following question – **Are you sure you would like to delete Supplementary form?**
5. Click **Delete**.



6. The form is deleted.

Note: Once the form is deleted it cannot be retrieved.

To Delete Supplementary Form attached to a Parent Form

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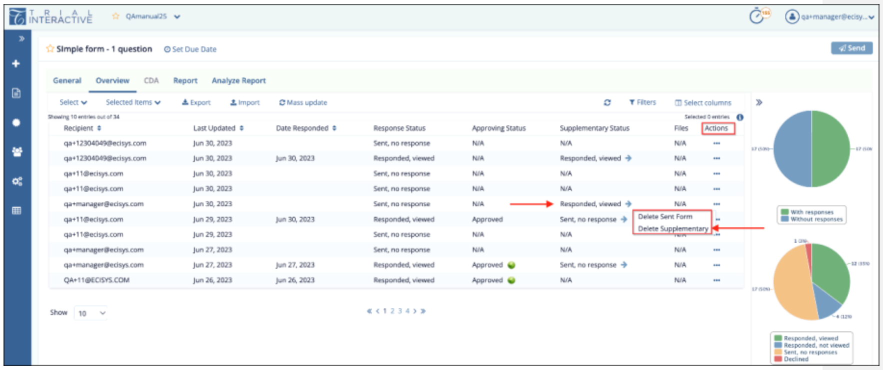
1. Select a form the that displays 'Published' status. The Overview page is displayed.
2. Select the recipient that displays the **Responded, Viewed** status in the "Supplementary Status" column.
3. Click the ellipsis in the Actions column to view the options –
   - Delete Sent Form
   - Delete Supplementary
4. Click **Delete Supplementary** option. The selected form is deleted. Refer to the screenshot below.



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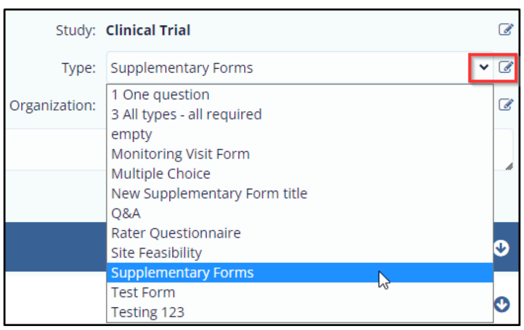
14.8.2 Change Type to Supplementary Form of an Existing Form

The General Forms both that display a status of – Draft and Published can be edited to view as Supplementary forms. Follow the steps below to change the general form to a supplementary form.

1. Select a form that displays Draft status.
2. The selected form opens in the grid.
3. Hover the mouse to the top right corner to view the **Study**, **Type** and **Organization** fields and an Edit icon for each field. Refer to the screenshot below.

4. Select the Supplementary Forms option from the dropdown menu. Refer to the screenshot below.
5. Click **Close** button displayed at the bottom of the screen. You are redirected to the General Forms screen.
6. Click the **Refresh** icon to view the changes made in the form.



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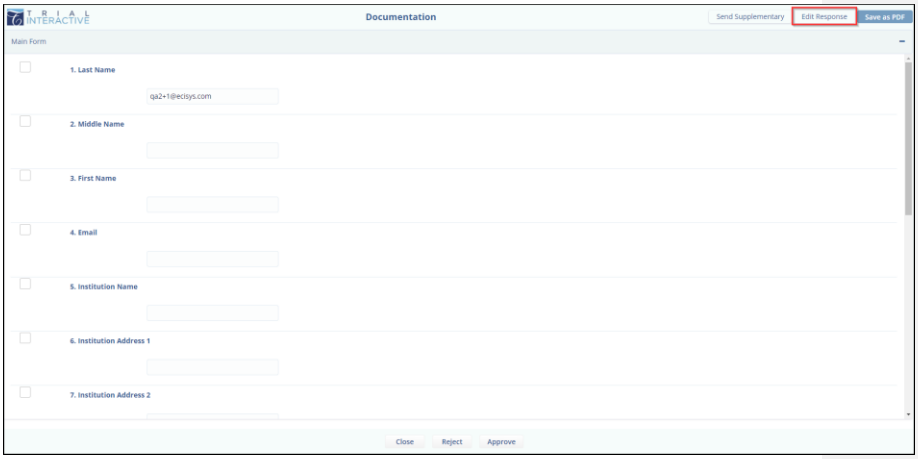
14.8.3 Approve or Reject a Supplementary Form

The supplementary forms that are published can be approved and rejected by the manager. Follow the steps below to approve or reject a supplementary form.

1. Select a user/recipient that displays the status '**Responded, Viewed**' in the Response Status column.

2. The form opens in a new tab with the options – Close, Reject and Approve buttons at the bottom of the screen.



3. Click the **Edit Response** button displayed at the top right corner to enable the fields for entering your responses. Notice that the Edit Response button is changed to Update Response button.

4. Enter the required answers in the fields and click **Update Response** button displayed at the top right corner.

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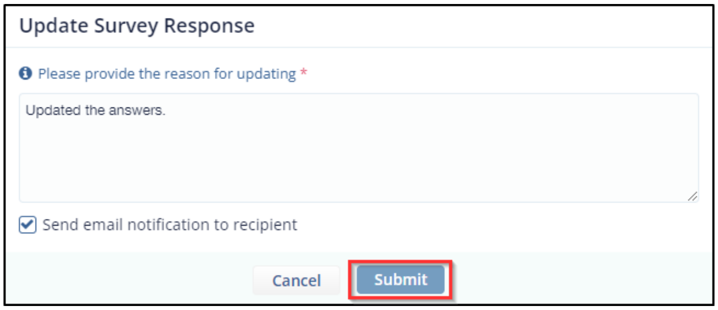
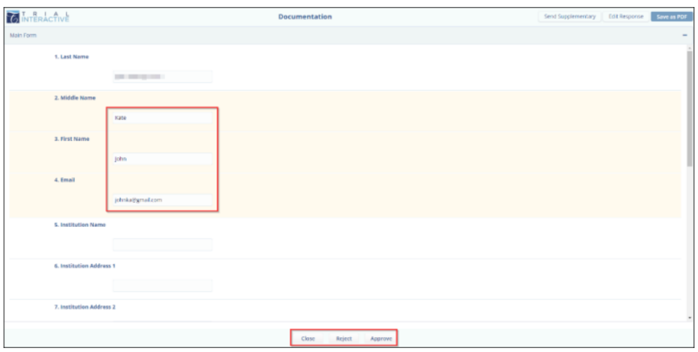
5. The Update Survey Response popup window is displayed. Enter a reason for updating of the answers. **Note:** This field is marked with an asterisk (*).

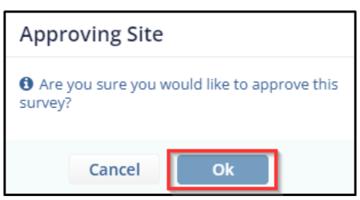
6. (Optional) You can select the checkbox of – Send email notification to recipient. Click **Submit**.

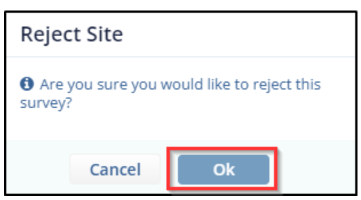


7. A popup window is displayed – The responses are updated and the updated responses are reflected in the form. Refer to the screenshot below.



8. Click the **Approve** or **Reject** button as required displayed at the bottom of the screen.
9. Click **OK** in the Approving Site popup window.





10. A notification is displayed - Survey has been approved.

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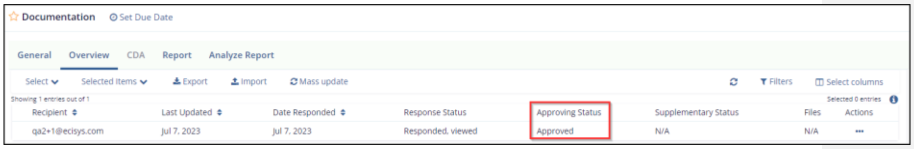
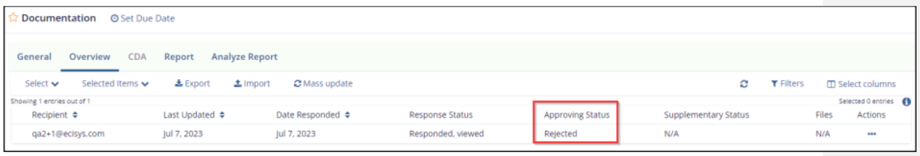
11. Navigate back to the Form Overview page and click the **Refresh** icon to view the status as Approved or Rejected in the Approving Status column. Refer to the screenshot below.





15. Form Statistics Page

When a Form is published, you are redirected to a Form Statistics Page which display the complete overview of a Form.

Commented [SJ2]: Add screenshots from this section to XML-12/7/23

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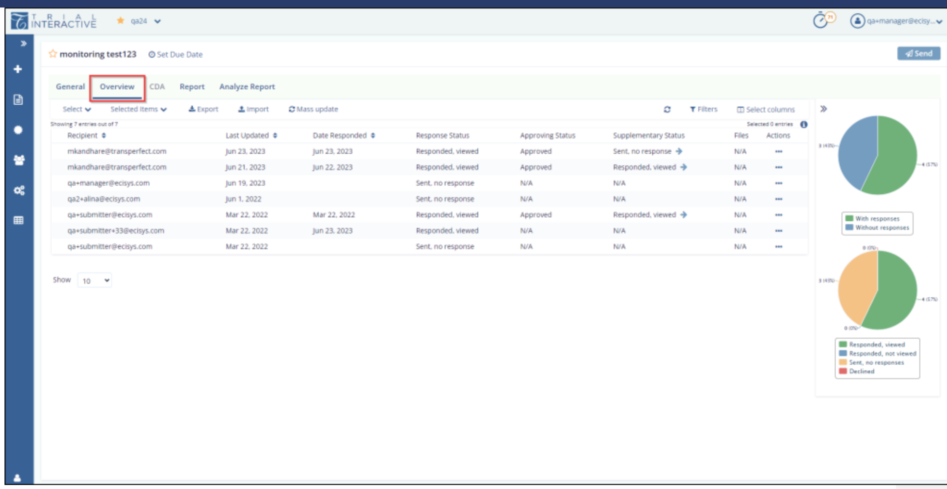

The Form Statistics page includes the following functions:

- Send
- Preview
- Close Form
- Share
- Overview
- CDA
- Reports
- Pie Charts
- Set Reminders
- Recipients
- Change Question Titles
- Import Answers
- Contact Mapping Schema

15.1 Send a Survey

The Manager sends a Survey Form in the form of link in a mail to the submitter. The Submitter fills the survey and submits it to the Manager.

To send a survey,

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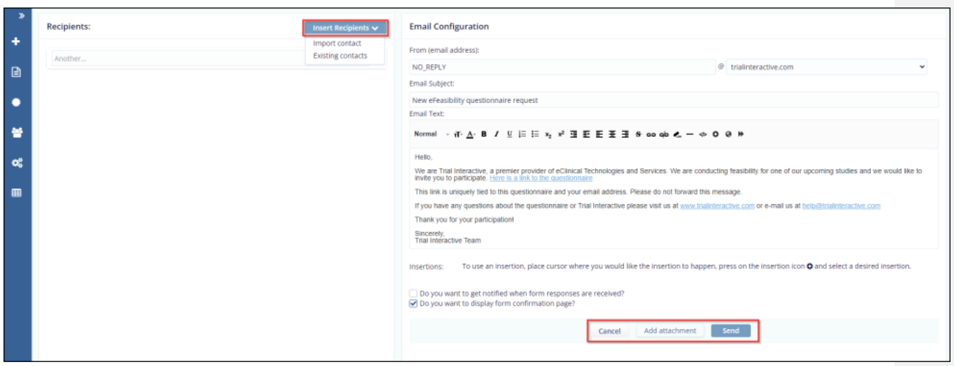
1. Open the Form to send for a Survey.
2. Click Send 

on a Form Statistics page (displayed on the top right corner) of an opened survey. This navigates you to the Email page, allowing you to send a survey.

The Email Page contains:

1. Recipients: This section allows you to insert recipients in an email.
2. Email Configuration: This section contains the body of an email. Refer Email Templates for more details on this.
3. The Cancel, Add Attachment and Send buttons in the Email Configuration section.



15.1.1 Email Recipients

Recipients are Contacts to whom a Survey is sent.

The Recipients section allows you to add the recipients in the following ways:

1. Manually: This allows you to add the contacts manually. Type the recipient's email address manually in the textbox with the title Another….. and hit Enter.
2. Insert Recipients: This allows you to add the recipients in two ways:
   - Import Contacts: This allows you to import contacts in a bulk.
   - Existing Contacts: This allows you to insert contacts from the available list.

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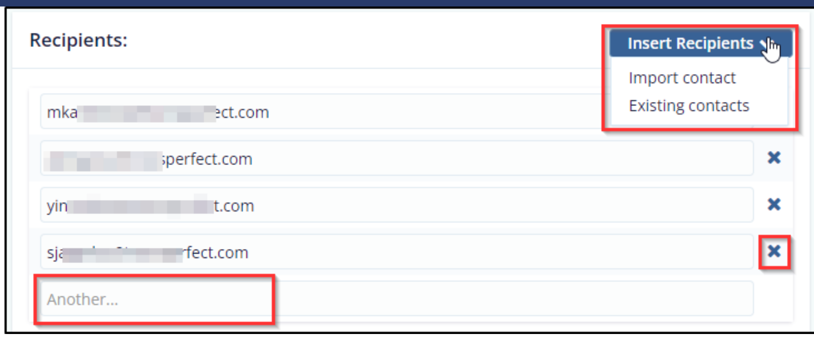
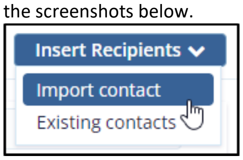
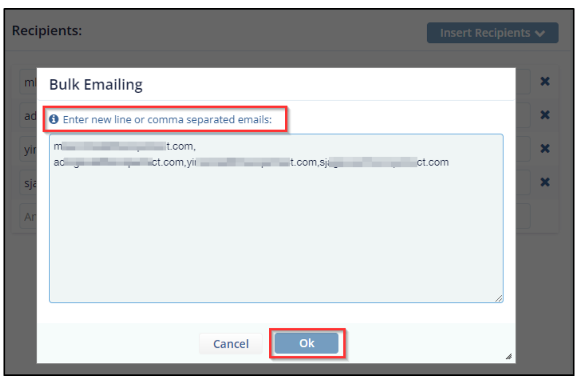


To Import contacts:

1. Click the Insert Recipients dropdown. A list appears which displays two options: Import Contacts and Existing Contacts.

2. Select Import Contacts. The Bulk Emailing pop up window is displayed which provides a long text area to enter emails of recipients. Follow the instruction mentioned above the textbox to enter emails. Refer to the screenshots below.





3. Click Ok. The list of recipients gets added to the recipient's section to whom a survey is to be sent. Refer to the screenshot below.

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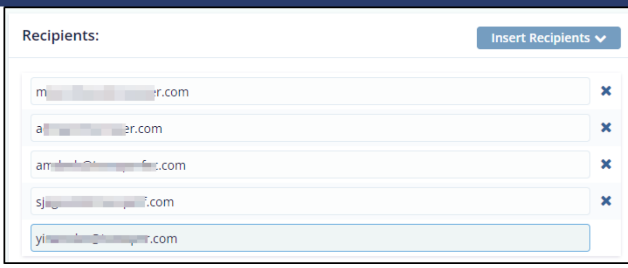
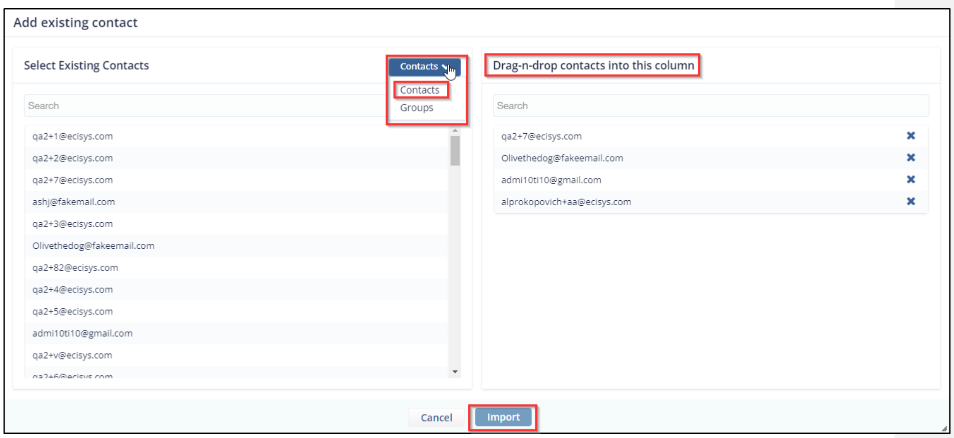


To add Existing Contacts:

1. Click Insert Recipients dropdown.
2. Select Existing Contacts.

3. The Add Existing Contacts pop up is displayed that provides the Contacts dropdown with types: Contacts and Groups.
4. Select Contacts from the dropdown.
5. Drag-and-drop required contacts from the existing contacts from the left panel to the column on the right panel. Refer to the screenshot below.



6. Click Import.
7. You can also search for contacts form the Search textbox above the Contacts list.

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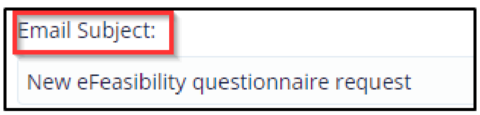
15.1.2 Email Address

This is the Email Address from which a Survey is sent. You can define the sender in a Form (email address) other than NO_REPLY and can set the domain name from the dropdown.

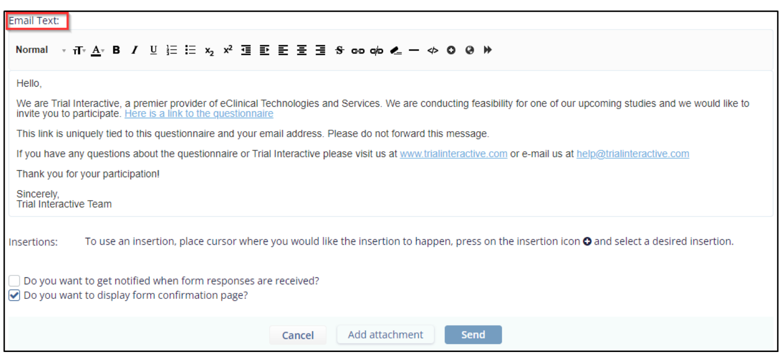
15.1.3 Email Subject

This section allows you to type the Email Subject. The default subject for the Email is defined in Email Templates.



15.1.4 Email Text

This section allows you to enter/modify the Email text in the Email Text area. Proceed to Email Templates for detailed information.



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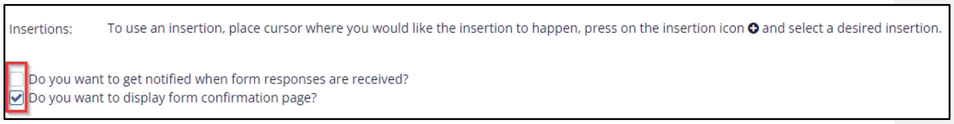
15.2 Additional Email Settings

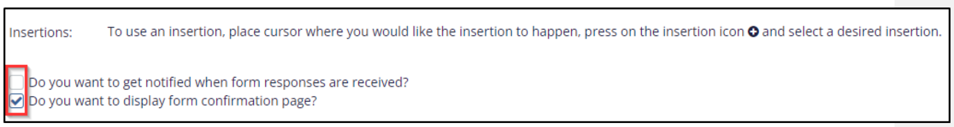
You can define the additional options in an Email by selecting the checkbox from the below:



15.2.1 Checkboxes

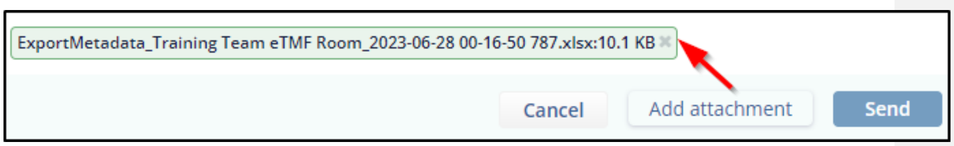
Get notified when form response is received: Enabling option allows you to receive notification messages by email when a survey response is submitted.

Display form confirmation page: Enabling this option displays a confirmation message when the submitter submits a survey. This option is selected by default in the email page.



15.2.2 Attachments

You can add single or multiple attachments to an Email by clicking add attachment button below the Text area.



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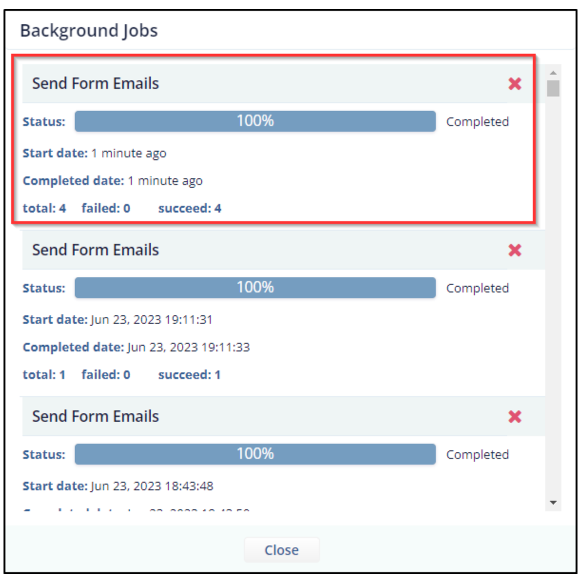
15.2.3 Form Processing Background Job Notification

Form sending is processed as a background job and a notification is displayed to the user. When user sends out a form, small pop-up appears on the screen shown in below image.

The user is redirected to the form overview screen and a notification appears in the notification area.

Click on the notification icon and background jobs processing details are displayed in Background Jobs screen. Details include email processing status, dates when the emails were sent and completion of that job, count of total emails sent, and counts of failed and succeeded jobs. Refer to the screenshots below of Background Jobs:



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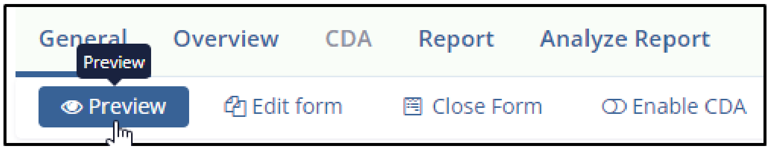
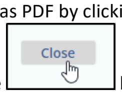
15.3 Previewing a Published Form

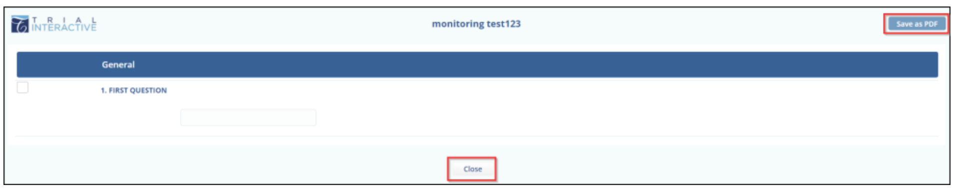
Click the **Preview** icon on a Forms Statistics Page to preview the form. Preview gives you an overview of a form with all the questions and sections added to it.



You can also save this Published Form as PDF by clicking Save as PDF 

button on a Preview page or Cancel the action by clicking a Close 

button displayed at the bottom of the page. Refer to the screenshot below.



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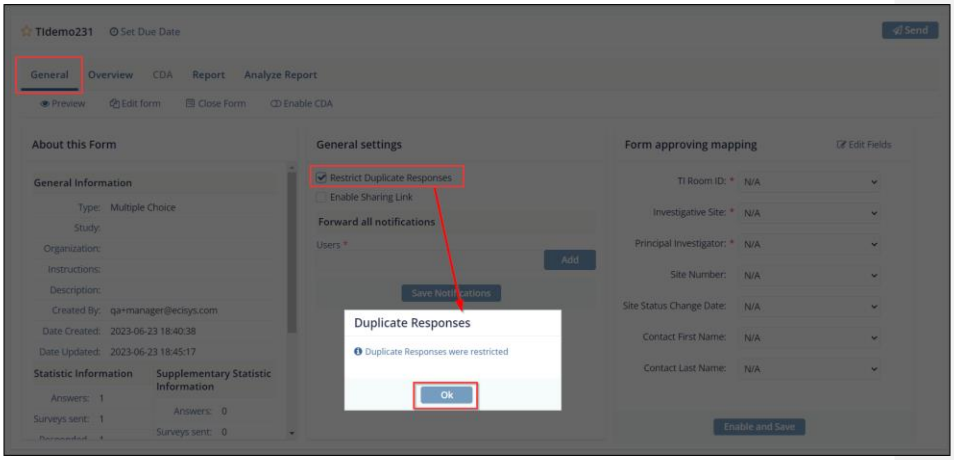
15.4 Restricting Duplicate Responses

When an email is sent out to the recipients, this newly added feature of Restrict Duplicate Responses will check if the recipient has already been added into the mailing list or not. If yes, then it will restrict the entry of duplicate recipient. This feature has been added in the Forms overview screen under the General Settings, refer to the below screenshot:

To make this feature work, it has to be enabled first. Click on the Duplicate Responses button and below screen will appear. Check the box Restrict Duplicate Responses that pops up the confirmation message as 'Duplicate Responses were restricted'. Refer the screenshot below.



Click **Ok** for the popup to disappear.

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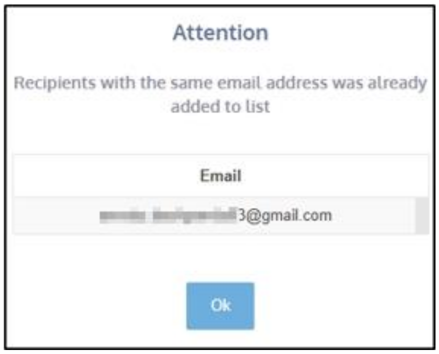
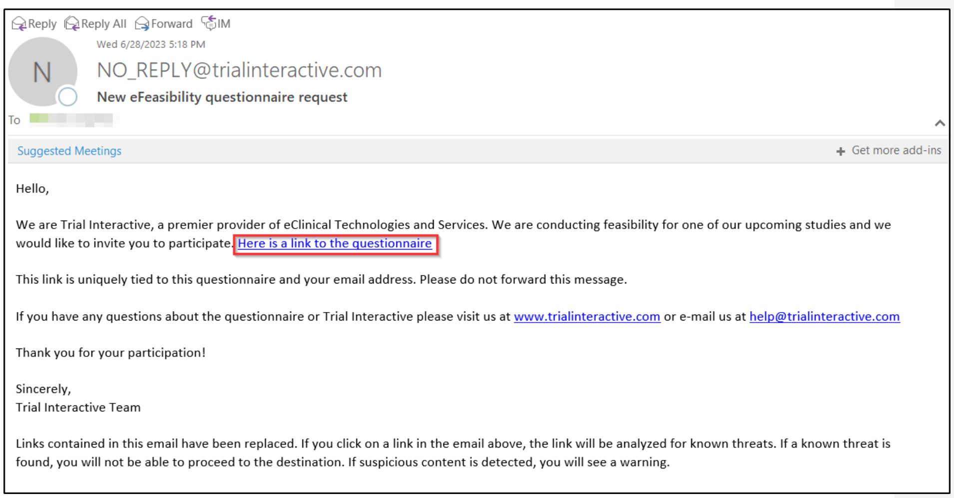
While sending out an email when user enters the duplicate recipient email address in Insert Recipient's field, system displays below warning message.



15.5 Form/Survey Responses

The Manager sends a survey in the form of an email link to the submitter. When submitter clicks the link, the form is opened in the browser at the submitter end. Below is an example of an email for Survey.



On receiving the response from the submitter, the Manager can view it under Overview tab on the Form Statistics Page. Refer to the screenshot below.

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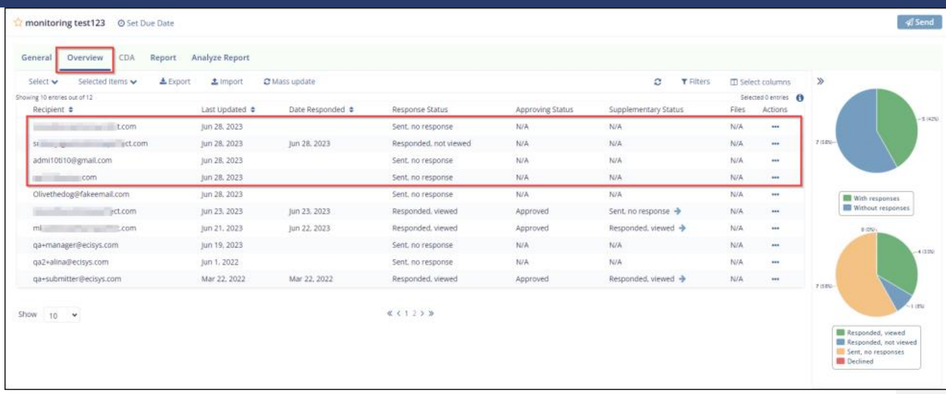
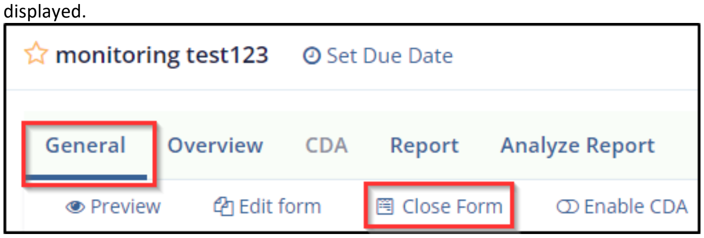


15.6 Closing a Form

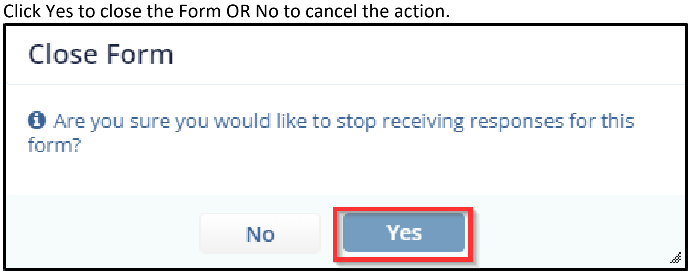
Closing a Form stops receiving responses and will no longer be available for a Survey.

To close a Form:

1. Click the General tab and click Close Form on the Form Statistics Page. The Close Form pop up window is displayed.



2. Click Yes to close the Form OR No to cancel the action.



3. The Email Template pop up window is displayed. Verify the details in the template are correct. Click **Continue**. The form is closed. Refer to the screenshot below.

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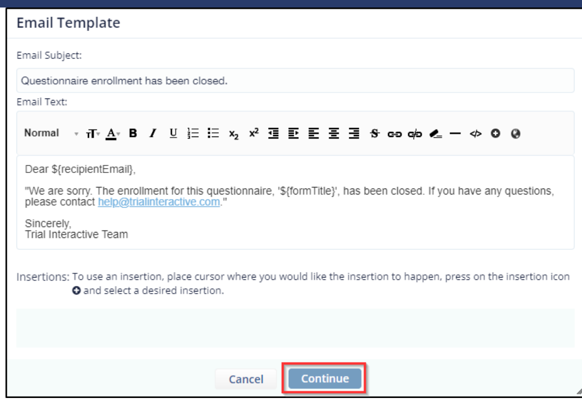
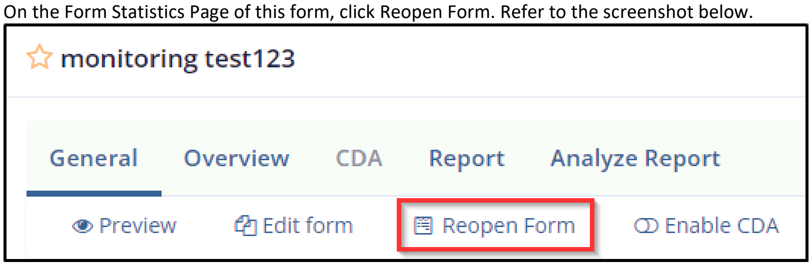


15.7 Reopening a Closed Form

Reopening a Closed Form resumes back the responses of the Form.

To reopen a closed form:

1. Select the Closed Form which you want to reopen.
2. On the Form Statistics Page of this form, click Reopen Form. Refer to the screenshot below.



Note: The Closed Form does not display Send, Save Notifications and Enable and Save buttons as you cannot send an email and receive responses of a closed form.

3. The Reopen Form pop up window is displayed.
4. Click Yes to reopen form.

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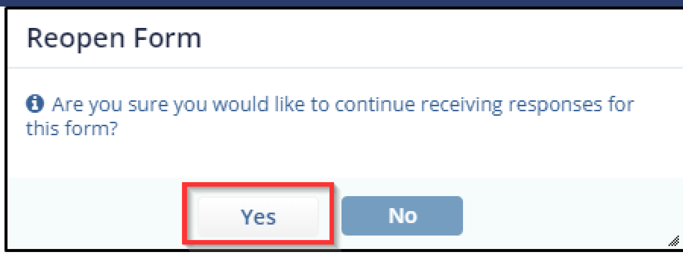
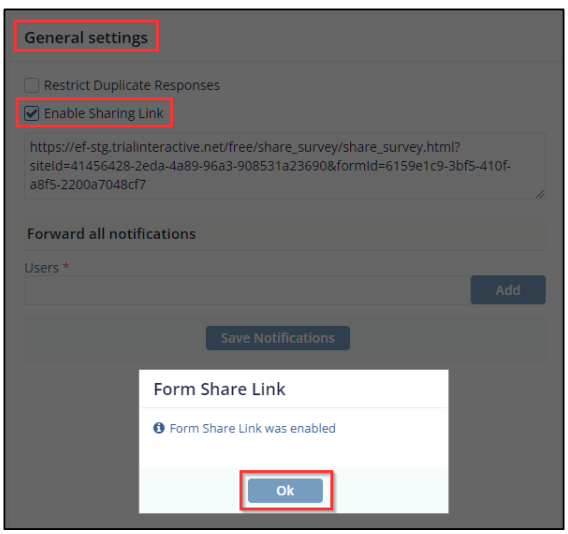


15.8 Enabling Shared Link

Enabling a shared link allows you to share the link with any person (needless an E-Feasibility user) to create a Survey and send it to the recipient. When any other person shares the link, a new instance of survey is created and sent to the recipient. When the submitter sends a response of this survey, the manager, who is the owner of the survey, receives the response. However, the person who shared the link will not be able to view the response of the Survey.



Click the checkbox available on a Forms statistics Page to Enable shared link. A dialog box opens and displays the link that can be shared with other contacts.

15.9 Actions on Forms (Overview)

Click the Overview tab on the Form Statistics Page to view the Form details.

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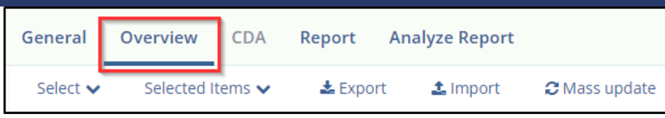
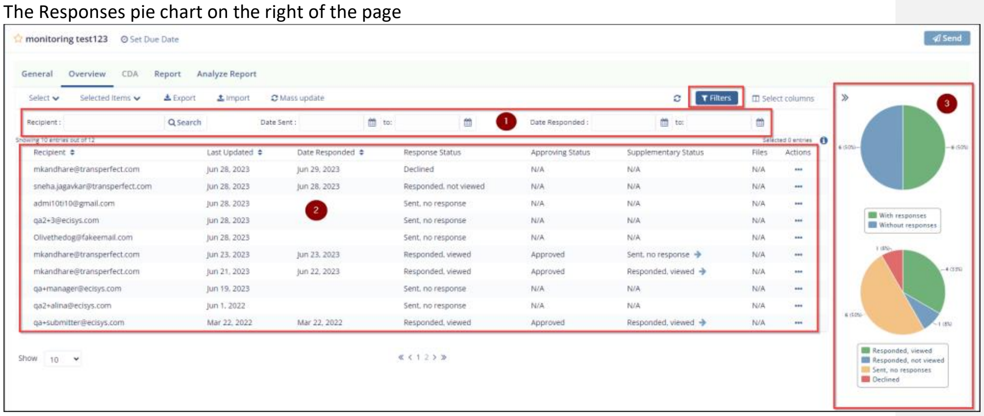


Overview section of a Form is divided into:

1. The Recipient, Date Filters and Page list on the left of the page
2. The Form Recipients table along with dropdowns in the center of the page
3. The Responses pie chart on the right of the page



The Recipient, Date Filters and Page list

Refer to section Recipients for further information on this.

Form Recipients table and dropdowns

Refer to section Recipients for further information on this.

The Responses Pie Chart

Refer to section Pie Charts for detailed information.

15.10 Decline a Survey

The Manager and Submitter both can decline a survey if required.

To decline a survey:

1. Open the required form and select the Recipient from a table on a Form Statistics Page to whom a Survey is sent.

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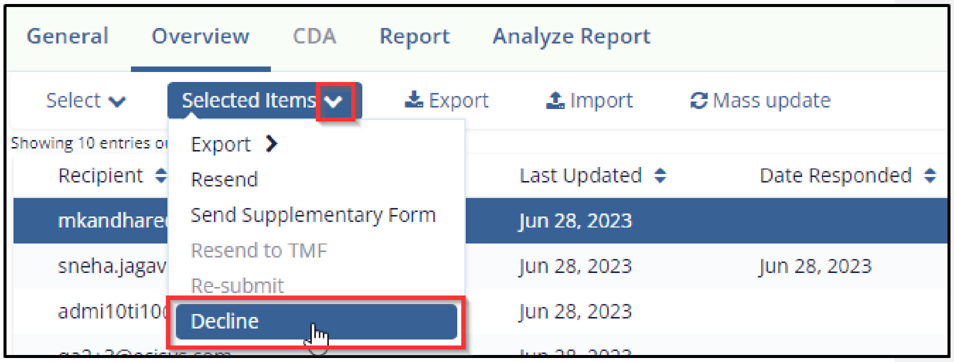
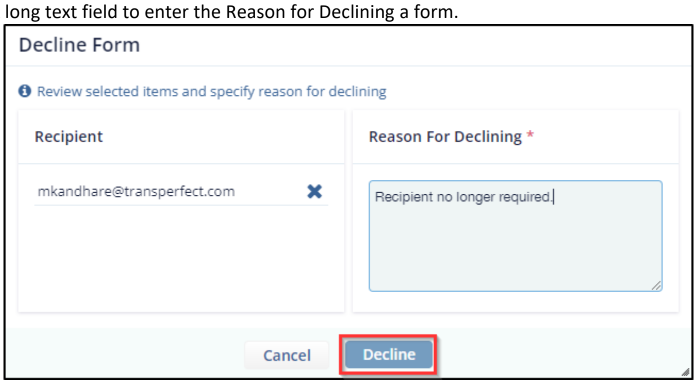
2. Click Selected Items dropdown. A list of actions is displayed.



3. Select Decline. The Decline Form pop up window is displayed that has the following sections:

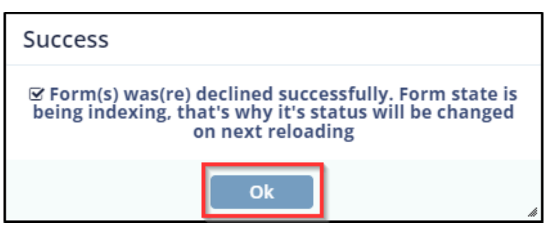
a. Recipient: This display the name/email of a Survey recipient.

b. A long text field to enter the Reason for Declining a form.



4. Click Decline. The Success dialog box opens displaying the confirmation of decline.

On declining a survey, the status of the recipient in a recipients table changes to **Declined** and the **Date Responded** column displays a date when the survey is declined after reloading the page.



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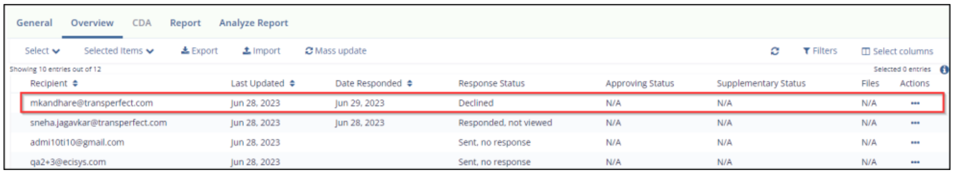


Note: All recipients of declined form receive a message about survey decline.

15.11 CDA

CDA is the Confidentiality Disclosure Agreement that Sponsor/CRO and Submitter agree upon and sign for Site feasibility. It is an agreement, which states that both the parties will not disclose any sensitive information to any other parties that are not included in the study. This topic is discussed in detail in Confidentiality Disclosure Agreement (CDA).

15.12 Report

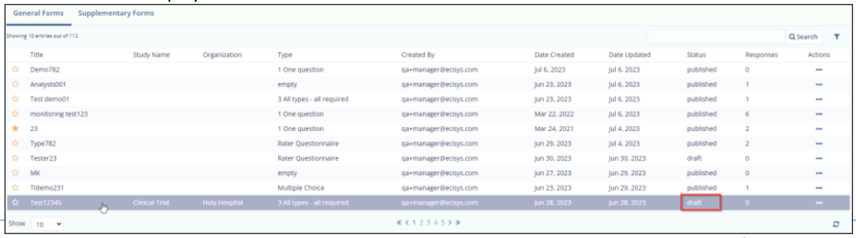
You can view the responses and activities of a Form from the Report Tab on the Form Statistics Page of an opened survey. Proceed to Reports for details information.

15.13 Changing Question Titles

Change Question Titles allows you to edit the Question Titles by clicking the Edit icon on the toolbar of the Form Statistics page.

To change Question Titles of a form:

1. Click a form that displays a 'Draft' status. Refer to the screenshot below.



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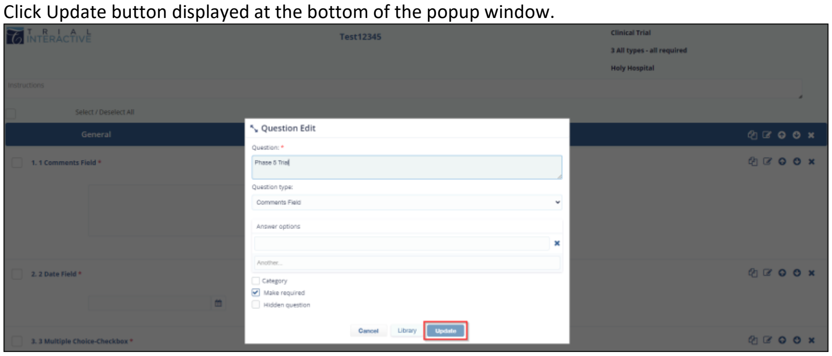
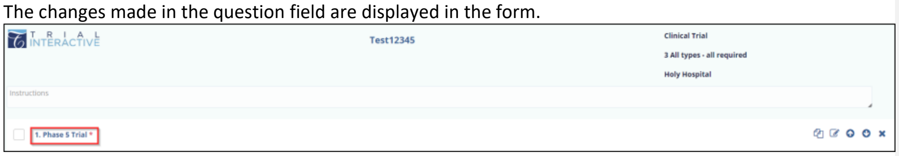
2. In the form that is displayed, click the Edit icon displayed at the right corner for each field. The Question Edit popup window is displayed.
3. Enter the name as required in the Question field that is marked with an asterisk (*).
4. Click Update button displayed at the bottom of the popup window.



5. The changes made in the question field are displayed in the form.



15.14 Importing Surveys/Answers

Importing Surveys/Answers allows you to import submitted Form Surveys for a recipient into a published survey. Once the source file is uploaded and Contact Mapping is done, a background job is started which display the progress of Survey Import.

Note: You can upload only .CSV and .XLSX file. The system displays an error message for the file format other than .CSV or .XLSX file.

To import the Survey:

1. Click the Import button from the Form Statistics page.

2. The Import Answers popup window is displayed that provides an Upload button to import the file along with two buttons: Cancel and Continue. The Continue button is deactivated by default and activated only when the source file is uploaded.

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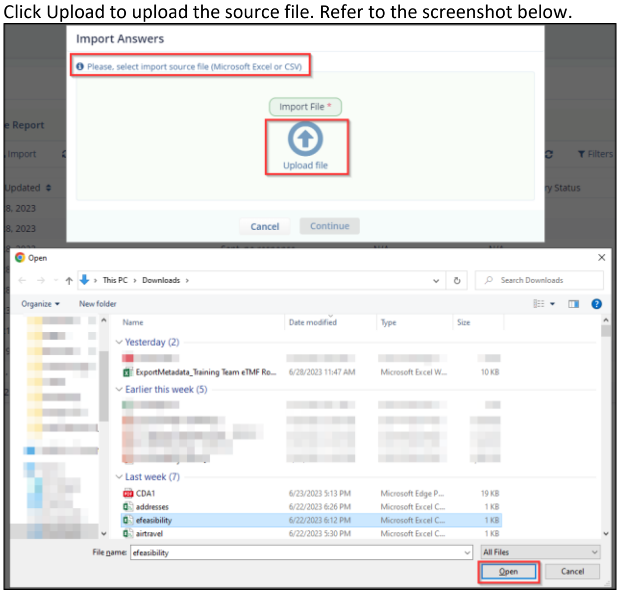
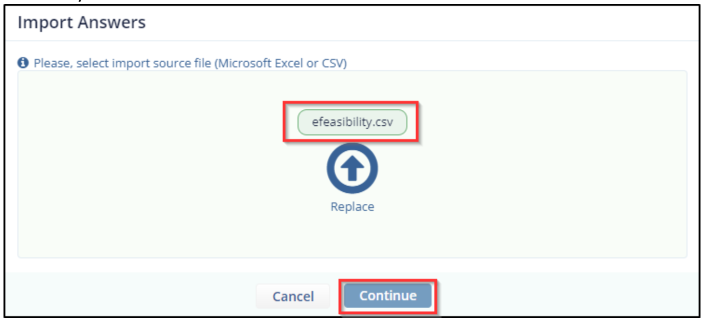
3. Click Upload to upload the source file. Refer to the screenshot below.



4. Click Continue. The Imports Answers popup window is displayed that allows you to map the fields of E-Feasibility with the fields of the source file.



5. Click the Accept button to view the import status in Background Jobs.

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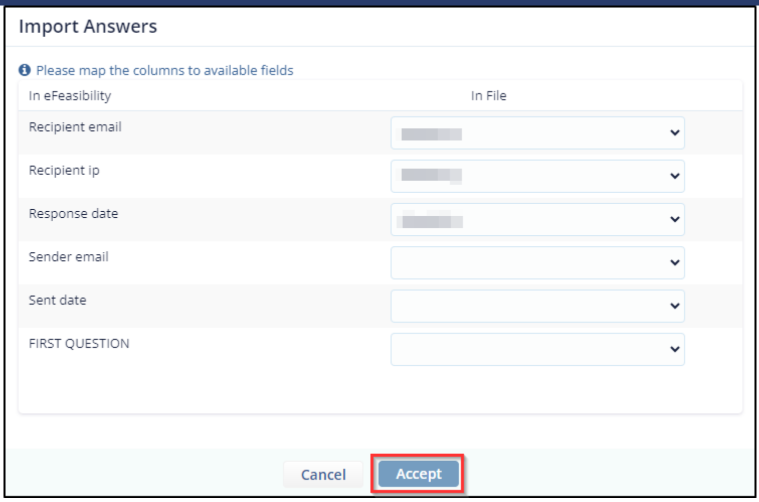

15.15 Contact Mapping Schema

Contact Mapping Schema specifies the relationship between Questions and Contact Information. Refer section Contact Configuration for detailed information on mapping.

To view the Contact Mapping Schema:

1. Select a form that displays a Draft status. The form Overview tab is displayed on the screen.
2. Click the General tab.
3. Scroll down to the Contact Mapping Schema to view the details of this field.
4. The Contact Mapping Schema fields display the mapping between Questions and Contact Information. Refer to the screenshot below.

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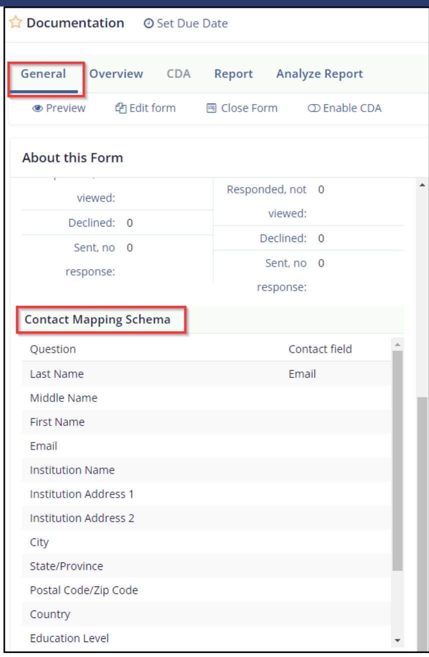


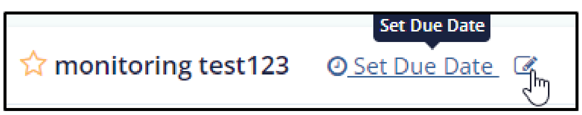
Note: Contact Mapping Schema is visible only when Questions are mapped with the Contact Information in [Contact Configuration](#).

15.16 Setting Reminder (Set Due Date)

For a Survey, a Manager can set up **Reminder Emails** to be sent out automatically to submitters who have not responded to a Survey.

To set Reminder:

1. Click the **Set Due Date** from the Form Statistics Page. The **Set Due Date** popup window is displayed.



2. The Set Due Date dialog contains the following panels:

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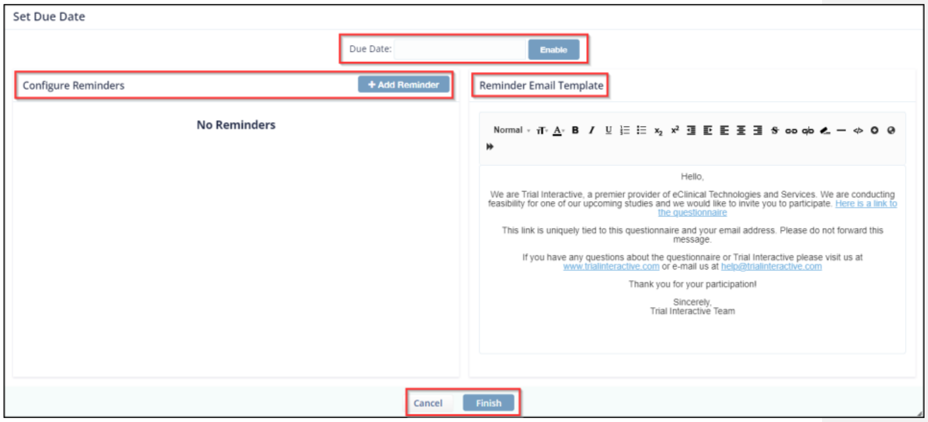
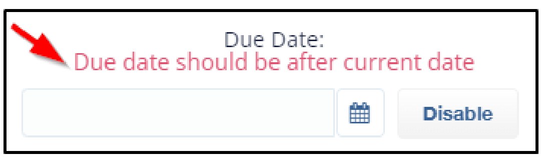
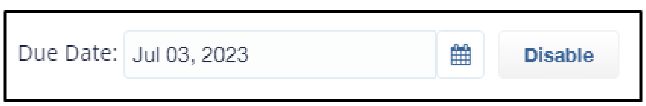
1. The Due Date textbox along with the **Enable** button next to it.
2. **Configure Reminders**: Allows you to set the reminder due dates.
3. **Reminder Templates**: This template is built-in and defined in [Email Templates](#).
4. The Cancel, **Add Reminder** and **Finish** buttons.



3. Click **Enable** to set the Due Date. The button changes its text to Disable and a message is displayed as shown below.





4. Click **Add Reminder button** to set reminder on Due Date or prior to Due Date. This enables the Reminder textbox in the Configure Reminder panel along with the following buttons:
   a. **Remove**: The reminder is removed.
   b. **Edit**: Allows to edit the reminder dates
   c. **Disable**: The reminder is disabled

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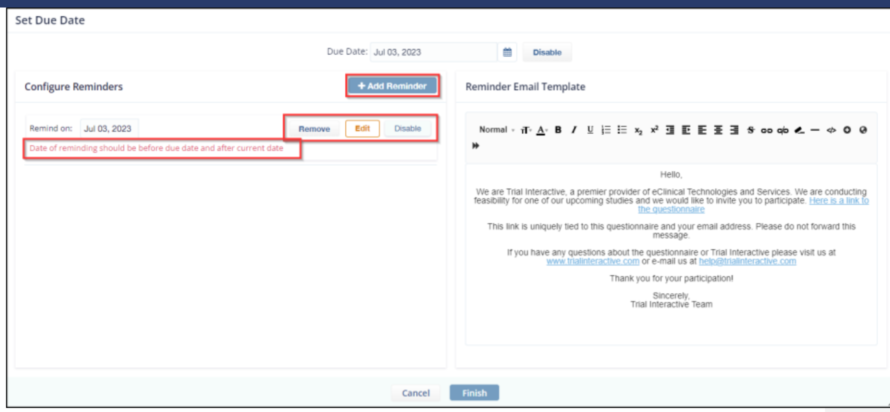
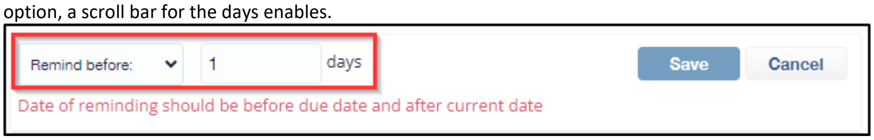


4. Click the **Edit** button next to the **Remind on** textbox to set/change the reminder for the Due Date.
5. The **Edit** button **disappears** and the **Remind On dropdown** enables which has following options:
    a. **Remind On:** To set reminder on selected date.
    b. **Remind before:** To set reminder prior to the Due Date.

6. Select the required option from the dropdown and set the reminder. Notice that for Reminder Before option, a scroll bar for the days enables.



7. Click Save to save the reminder and then Finish. The reminder count is displayed next to the Due Date on the Form Statistics Page.

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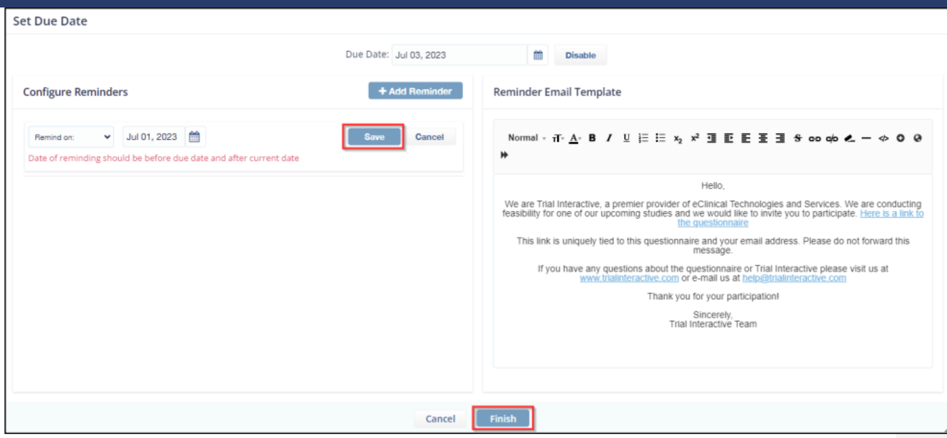


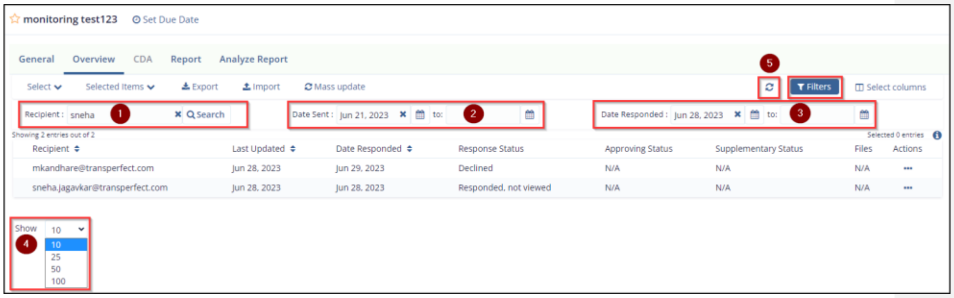
15.17 Recipients

Recipients are the Contacts to whom a survey is sent. The table on a Form Statistics Page displays the recipients list to which the survey is sent.

15.17.1 Recipient, Date Filters and Page List

You can also search for the recipients from the report section of the Form which provides the following: Click the **Filters** button to view the below mentioned fields.

- Recipient textbox: This allows you to search for a particular recipient.
- Date sent: This allows you to search for the surveys by sent date.
- Date Responded: This allows you to search for the survey responses by responded date.
- Items Per Page: This allows you to set the number of recipient’s entries on the page.
- Refresh: This allows you to reset the changes. Refer to the screenshot below.



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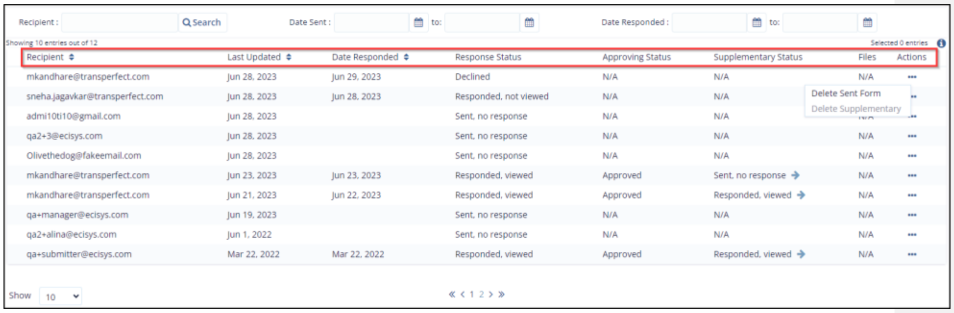
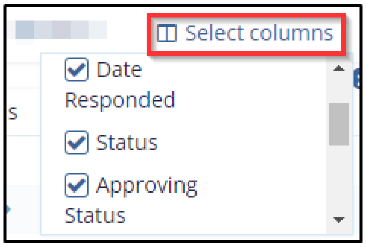
15.17.2 Form Recipients Table and Dropdowns

This table summarizes a recipients list to which a form is sent. This table contains below columns:

- Recipient: This displays the recipient name to whom a form is sent.
- Last Updated: This displays the date when a form was latest updated.
- Date Responded: This displays the date when the form was responded.
- Response Status: This displays the status of form responses.
- **Approving Status:** This displays the status of the form approved by the user.
- **Supplementary Status:** This displays the status of forms that are attached as supplementary to the main form.
- Files: This displays the count of the attached file to form in a response.



- **Select Columns:** This allows you to select the columns that should be displayed/hidden in the grid. Select the checkboxes of the columns that you want to be displayed. Refer to the screenshot below.



The Form Statistics Page also provides the following dropdowns above the recipients table:

- Select: This allows you to select or deselect the forms for further actions.

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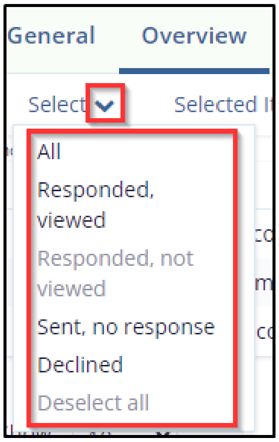
1. **All:** Click this option to select all the recipients of the form. All the recipients are highlighted in blue color.

Note: Selecting this option disables all other options mentioned below. Click the **Deselect all** option to enable all other options.

2. **Responded, Viewed:** Click this option to view only those recipients that have responded and viewed the form. The recipients are highlighted in blue color.
3. **Responded, Not Viewed:** Click this option to view only those recipients that have responded but not viewed the form. The recipients are highlighted in blue color.
4. **Sent, No Response:** Click this option to view only those recipients to whom the forms are sent, but the user has not responded to the form. The recipients are highlighted in blue color.
5. **Declined:** Click this option to view only those recipients those have declined the form. The recipients are highlighted in blue color.
6. **Deselect All:** Click this option to not select any form. The grid is displayed in white color. Refer to the screenshot below.



- Selected Items: This allows you to resend, export or decline a selected form.
  Note: Select a form to enable the below mentioned options.
  a. **Export:** Click this option to either export the answers of the form or to export the form for editing. Clicking any of the options, the form is downloaded in the 'Downloads' folder of your system.
     (1) Answers: This allows the user to export and download a .csv file to add answers.
     (2) For Editing: This allows the user to export and download a .csv file to edit the answers.

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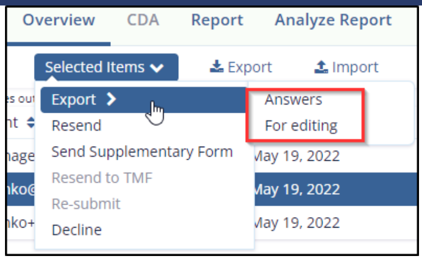


b. **Resend:** This allows you to Resend the form to the recipients who have not responded.

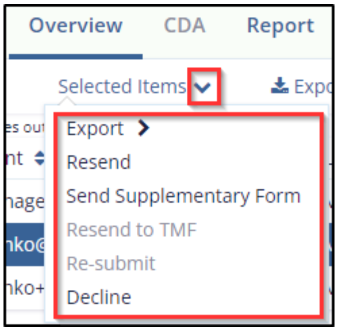
c. **Send Supplementary Form:** This allows you to send a supplementary form to the recipient. The recipient receives a email with a link. Clicking the link redirects the user to fill the form and submit their answers.

d. **Resend to TMF:** This allows you to send the form again to TMF. This option is enabled only when the form is to be resent for integration with Origami.

e. **Re-submit:** This allows you to submit the form again to the recipient to answer the questions in the form. Select this option and click **Send** in the pop-up window. This option is enabled only when the following are displayed in the Response Status column:

   (i) Responded, Viewed

   (ii) Responded, Not Viewed



f. **Decline:** This allows the user to decline a recipient in the existing published form. It is mandatory to mention a reason for declining the recipient. Refer to the screenshots below.

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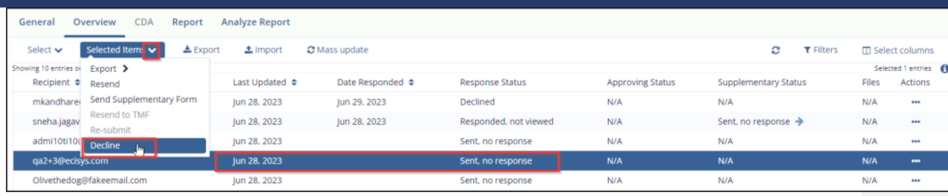
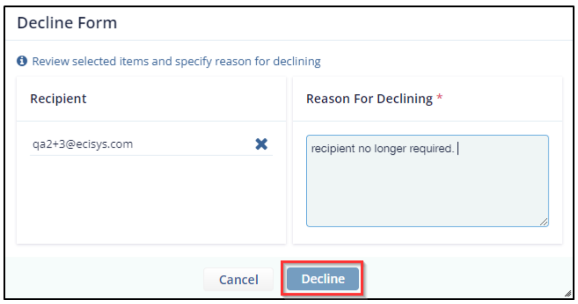
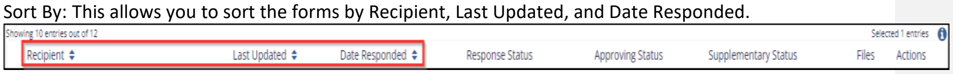
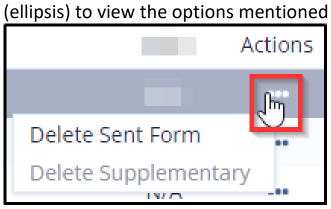




- Sort By: This allows you to sort the forms by Recipient, Last Updated, and Date Responded.



- Actions: This allows you to delete the sent form and delete the supplementary form. Click the three dots (ellipsis) to view the options mentioned below. Refer to the screenshot below.



a. **Delete Sent Form:** Select this option to delete the sent form.

b. **Delete Supplementary:** Select this option to delete the supplementary form that is sent. This button is enabled only if a supplementary form is attached to the sent form.

Note: The behavior of all dropdowns changes depending upon the status of the form.

- Mass Update: This allows you to mass update the form and send email notification to the recipients of the form. Refer to the screenshots below.

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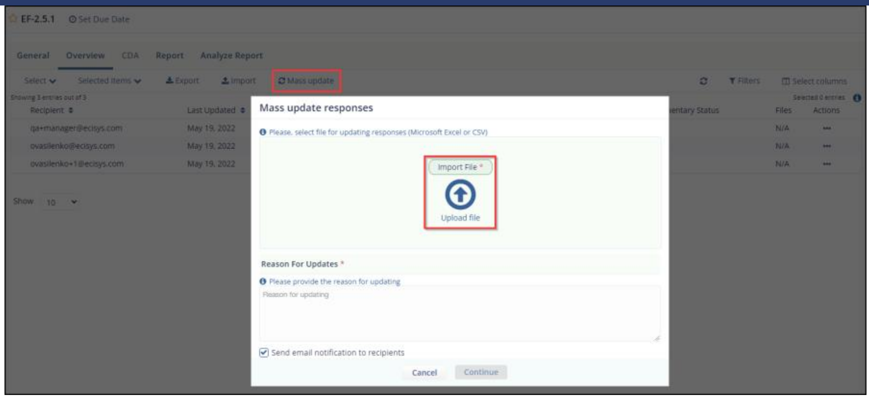

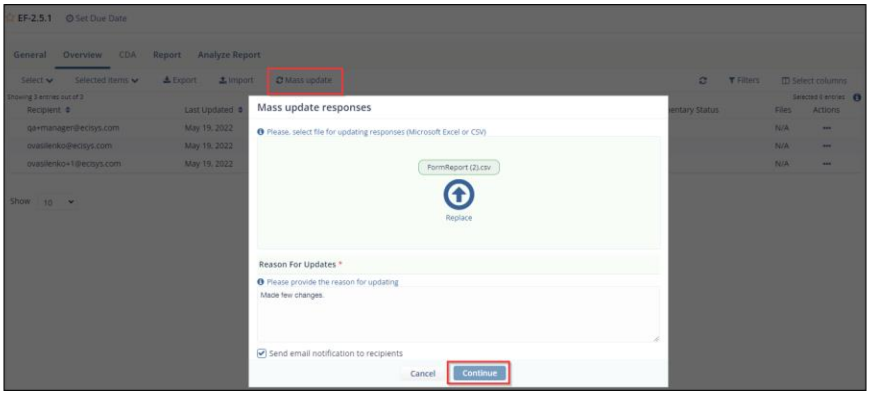

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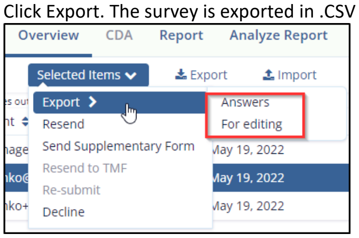
15.17.3 Export Recipient

You can export the recipients list and their responses into a CSV file.

To Export a list of recipients:

1. Select the recipient from the recipients table.
2. Click Selected Items dropdown.
3. Click Export. The survey is exported in .CSV file.



On Exporting into CSV file, the following information will be displayed in the excel sheet that is exported.

- Title
- Type
- Sponsor (Form Organization)
- Study
- Comment (Form Instructions)
- Recipient\Submitter
- Submitted date
- IP: The recipient’s IP address is determined automatically by the system.
- Country: The recipient’s country is determined automatically based on the IP.
- City: The recipient’s city is determined based on the IP.
- **Question:** The question that is mentioned in the form is displayed in this column. Refer to the screenshot below.

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	A	B	C	D	E	F
1	Title	monitoring test123				
2	Type	1 One question				
3	Sponsor					
4	Study					
5	Comment					
6						
7	Recipient\Submitter	Submitted date	IP	Country	City	FIRST QUESTION
8	vkar@tra	6/28/2023	114.143.159.74, 172.31.2	India		Answer is 2
9	ter+33@	6/23/2023	114.143.159.74, 172.31.2	India		1234
10	ter@ecis	3/22/2022	176.98.73.164, 172.31.24	Ukraine	Cherkasy	123
11	e@transp	6/22/2023	114.143.159.74, 172.31.2	India		12344
12	e@transp	6/23/2023	114.143.159.74, 172.31.2	India		12345

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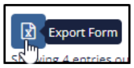
15.17.4 Export All Recipients List

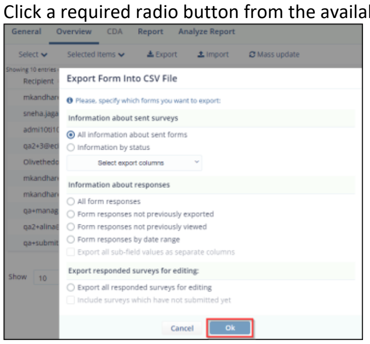
Likewise, single recipient export, you can also export multiple recipients list.

To Export a list of all recipients:

1. Select the Export  icon on the Form Statistics Page.

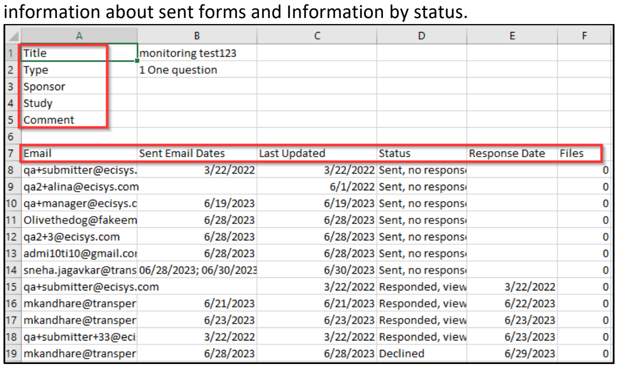
2. The **Export Form Into CSV File** pop up window is displayed.

3. Click a required radio button from the available options. Refer to the screenshot below.



Note: The ‘Export all sub-field values as separate columns’ option is enabled only after selecting the ‘Form responses by date range’ radio button. Same is applicable for the ‘Include surveys which have not submitted yet’ option. Refer to the above screenshot.

4. Select the options for export and click OK. The below screenshot shows the export based on All information about sent forms and Information by status.



	A	B	C	D	E	F
1	Title	monitoring test123				
2	Type	1 One question				
3	Sponsor					
4	Study					
5	Comment					
6						
7	Email	Sent Email Dates	Last Updated	Status	Response Date	Files
8	qa+submitter@ecisys.	3/22/2022	3/22/2022	Sent, no respons		0
9	qa2+alina@ecisys.com		6/1/2022	Sent, no respons		0
10	qa+manager@ecisys.c	6/19/2023	6/19/2023	Sent, no respons		0
11	Olivethedog@fakeem	6/28/2023	6/28/2023	Sent, no respons		0
12	qa2+3@ecisys.com	6/28/2023	6/28/2023	Sent, no respons		0
13	admi10ti10@gmail.co	6/28/2023	6/28/2023	Sent, no respons		0
14	sneha.jagavkar@trans	06/28/2023; 06/30/2023	6/30/2023	Sent, no respons		0
15	qa+submitter@ecisys.com		3/22/2022	Responded, view	3/22/2022	0
16	mkandhare@transper	6/21/2023	6/21/2023	Responded, view	6/22/2023	0
17	mkandhare@transper	6/23/2023	6/23/2023	Responded, view	6/23/2023	0
18	qa+submitter+33@eci	3/22/2022	3/22/2022	Responded, view	6/23/2023	0
19	mkandhare@transper	6/28/2023	6/28/2023	Declined	6/29/2023	0

15.17.5 Resend to all not responded recipients

To Resend form to all not responded:

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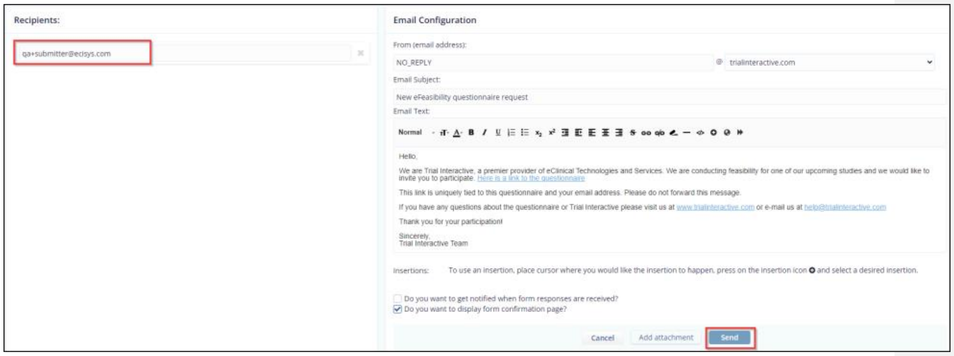
1. On the Form Statistics Page of an opened survey, click on the recipient with a status that displays 'Sent, no response'.
2. Click the Selected Items dropdown menu. Select the Resend option. An Email Configuration page is displayed.
3. The list of all the recipients whose responses are not received is added to the Recipients column on the left side of the Email Configuration Page.
4. Click Send on the right bottom of the page. Refer to the screenshot below.



Note: You can also add an attachment if required. The button is displayed before the Send button.

15.18 Pie Charts

Pie Charts give a complete graphical overview of the Form Responses and Statuses.

This panel displays two the following graphs:

- Form Responses Pie Graph
- Message Status Pie Graph

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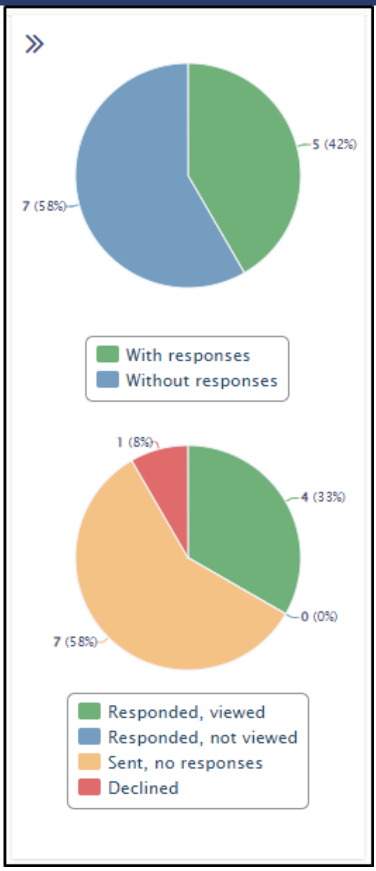

15.18.1 Form responses Pie Graph

This graph displays the percentage and the number of forms with and without responses. Hover a mouse over the graph to view the count of forms and numerical percentage with and without responses.

Clicking a pie on a graph detaches it from the graph and displays a form with specific responses in a table. You can also click an item in a legend to exclude it from calculation in a graph.

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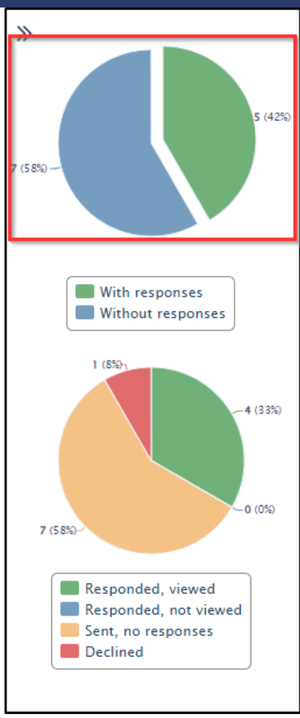

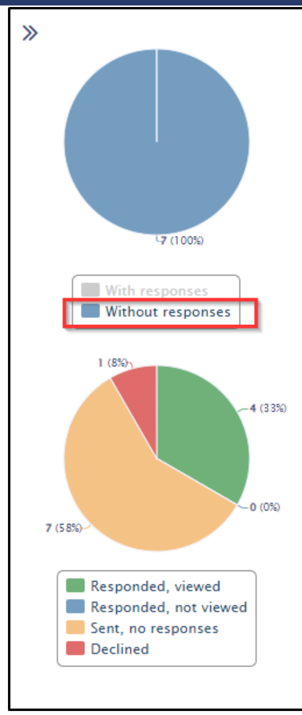

15.18.2 Message Status Pie Graph

This graph displays the percentage and the number of forms in different status:

a. Responded, Viewed;

b. Responded, not viewed;

c. Sent, no responses;

d. Declined.

Hover a mouse over the graph to view the count of forms and numerical percentage with and without responses.

Clicking a pie on a graph detaches it from a graph and displays a form with the specific responses in a table. You can also click an item in a legend to exclude it from calculation in a graph.

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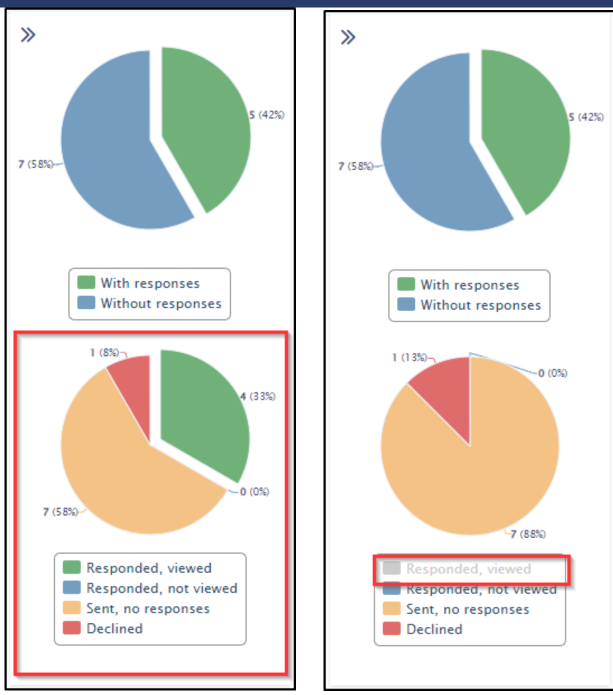
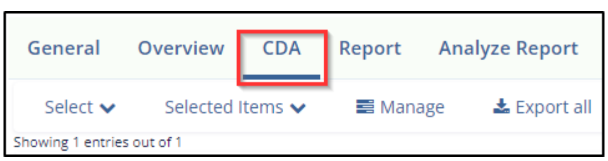


16. Confidentiality Disclosure Agreement (CDA)

CDA is attached in an email that is sent for a Survey. The Submitter can complete a Survey only when the CDA is signed by Sponsor/CRO. When the CDA is signed by Sponsor/CRO, the submitter gets notified and then he/she can complete the survey and submit it.

Commented [SJ3]: Add screenshots from this section to XML-12/7/23

Manager can create CDA by clicking CDA in the toolbar on a Form Statistics page of a published form.



CDA provides the following functionalities:

- Creating CDA
- Enabling Digital Signature for CDA
- Enabling DocuSign for CDA

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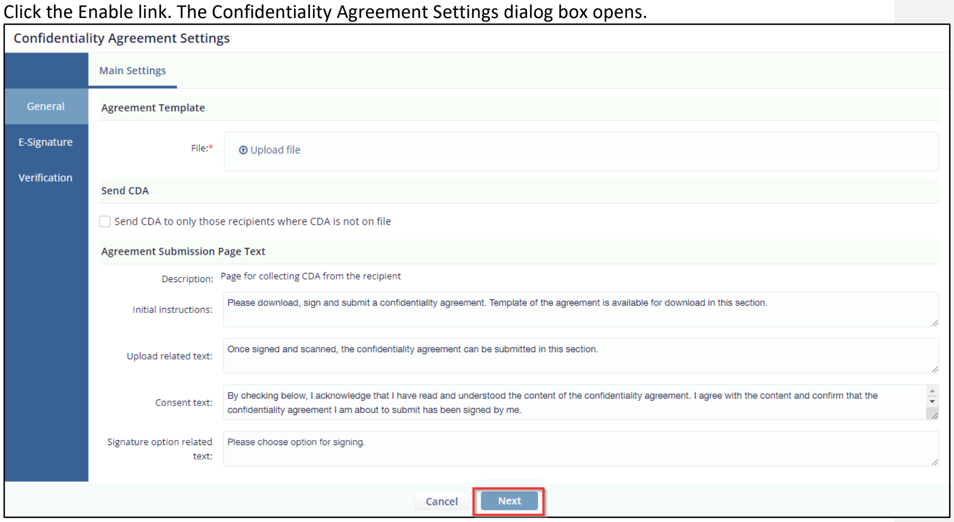
- Enabling Manual Verification for CDA

16.1 Creating CDA

To create CDA:

1. From the Form Statistics Page, click the CDA tab. The Enable link appears when the new CDA is created.

2. Click the Enable link. The Confidentiality Agreement Settings dialog box opens.



3. The Confidentiality Agreement Settings dialog box is divided into following sections:
   - Main Settings Tab on the top
   - General (highlighted), E-Signature, and Verification tabs on the left
   - Agreement Template
   - Send CDA
   - Agreement Submission Page Text with a Preview button
   - Verification in Progress Page Content with a Preview button

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- The Cancel and Next buttons

Agreement Template

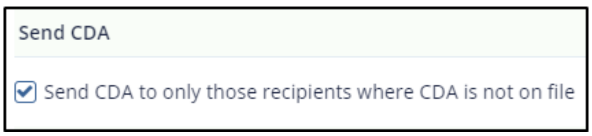
This section provides an Upload button to allow the user to upload the CDA file.

When a CDA file is uploaded:

1. The Upload File button displays the name of uploaded file.
2. The Blue Up-arrow  is displayed which allows the user to replace the uploaded CDA file.

Note: You can upload only doc or docx file in the agreement.

Send CDA
en



Agreement Submission Page Text

This section provides the following textboxes:

- Initial Instruction: This allows the user to set the initial instructions for the CDA.
- Upload Related Text: This gives the instructions regarding the CDA submission.
- Consent text: This allows the user to agree and confirm the content of the agreement.
- Signature option related text: This provides the user with options for signing the document.

- The Preview button in the bottom of the section provides a preview of the section.

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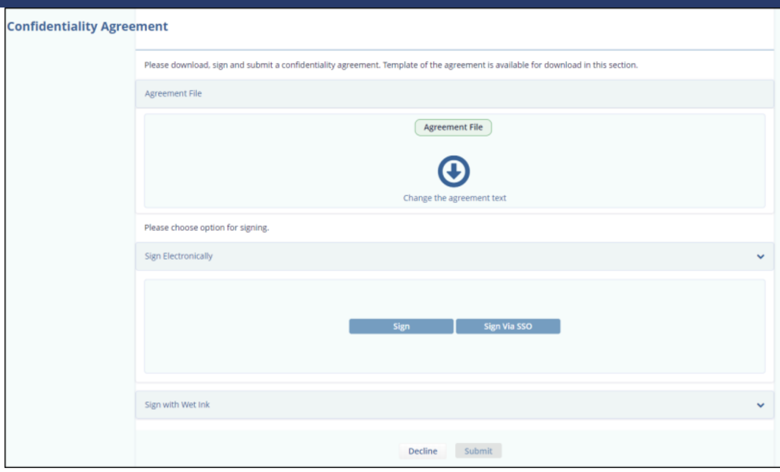
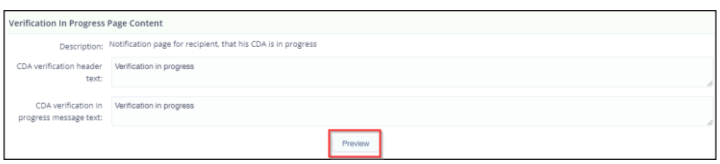


Verification in Progress Content

This section provides the following:

- Description: This displays a one-line notification – the user's CDA is in progress.
- CDA Verification header text: This displays the header for CDA verification progress.
- CDA verification in progress message text: This provides the message for verification in progress.



- The Preview button at the bottom center of the section provides a preview of the section.

3. After uploading the CDA file, click Next. The Confidentiality Agreement Settings page opens which display the following:
    1. The pages: Main Settings (Highlighted), Additional CDA Settings, General Settings, Verification Email, Signed CDA Reply, Manage Signers, and Notification for signers on the top.

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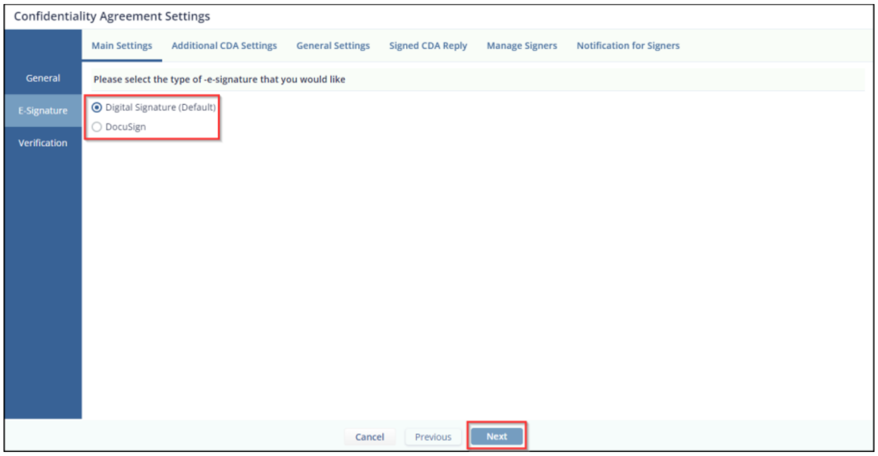
2. The tabs: General, E-Signature (Highlighted), and Verification on the left
3. The e- signature options:
    a. Digital Signature: This signature is enabled by default for the e-signature process.
    b. DocuSign: To enable this signature, you need to configure the DocuSign in Settings->E-Signature.
4. The Cancel, Previous and Next buttons.



Note: The E-signature page displays only when the DocuSign settings are configured in Settings, else Digital signature is selected by default.

5. Select the required option for E-Signature and click Next. The E-Signature options are discussed in the subsequent sections.

16.2 Enabling Digital Signature

To enable Digital Signature, refer to the following sections below. The following sub topics are discussed in this section:

- General Settings Page
- Verification Email Page
- Signed CDA Reply Page
- Manage Signers Page
- Notification for Signers Page
- Manual Verification Page

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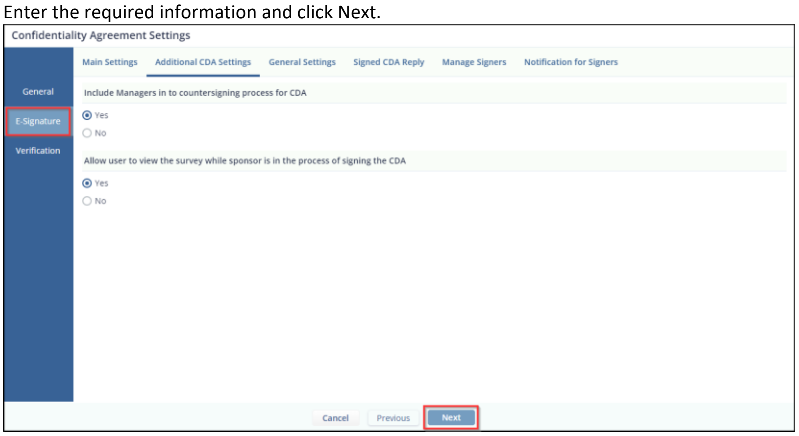
16.2.1 General Settings Page

From the E-Signature tab, clicking Next to redirects you to the General Settings page which provides the following:

1. The pages: Main Settings, General Settings (Highlighted), Verification Email, Signed CDA Reply, Manage Signers, and Notification for signers on the top
2. The tabs: General, E-Signature (Highlighted), and Verification on the left
3. The sections:
    a. Allow user to view the survey while sponsor is in the process of signing the CDA with two radio buttons:
        i. Yes: Selecting this radio button allows submitter to view the survey when the sponsor is in process of signing the CDA.
        ii. No (selected by default): Selecting this radio button restricts the submitter view the survey till it is signed by the CRO.
    b. Expiration period for verification link (in minutes): A textbox with increment and decrement buttons to choose the minutes for the expiration of the link.
    c. List of default reasons for signature: A textbox to allow you to enter the reasons for signature. You can add multiple reasons for the signature.
4. The Cancel, Previous and Next button.
5. Enter the required information and click Next.



16.2.2 Verification Email Page

From the General Settings page, clicking Next redirects you to the Verification Email page which provides the following:

1. The pages: Main Settings, General Settings, Verification Email (Highlighted), Signed CDA Reply, Manage Signers, and Notification for signers on the top

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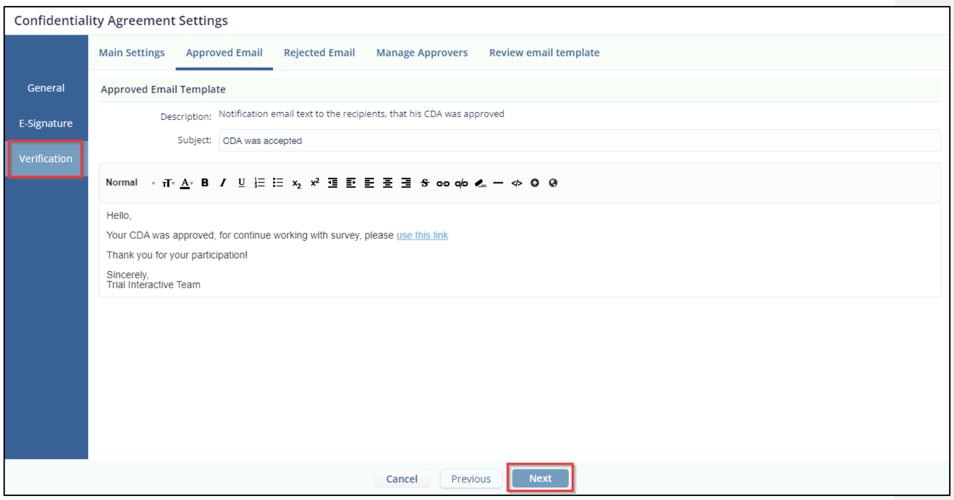
2. The tabs: General, E-Signature (Highlighted), and Verification on the left
3. Two sections along with a heading Verification Email Template.
    a. Subject: A textbox which allows the Manager to set the subject for an E-Signature verification mail. The E-Signature verification link subject is displayed by default.
    b. Content: A text editor with a toolbar and a default template body for the email.
4. The Cancel, Previous, and Next buttons.
5. Click Next.



16.2.3 Signed CDA Reply Page

From the Verification Email page, clicking Next takes you to the Signed CDA Reply page which provides the following:

1. The pages: Main Settings, General Settings, Verification Email, Signed CDA Reply (Highlighted), Manage Signers, and Notification for signers on the top
2. The tabs: General, E-Signature (Highlighted), and Verification on the left
3. Two sections along with a heading Verification Email Template.
    a. Subject: A textbox which allows the Manager to set the subject for Signed reply Email Template.
    b. Content: A text editor with a toolbar and a default template body for the email.
4. The Cancel, Previous, and Next buttons.

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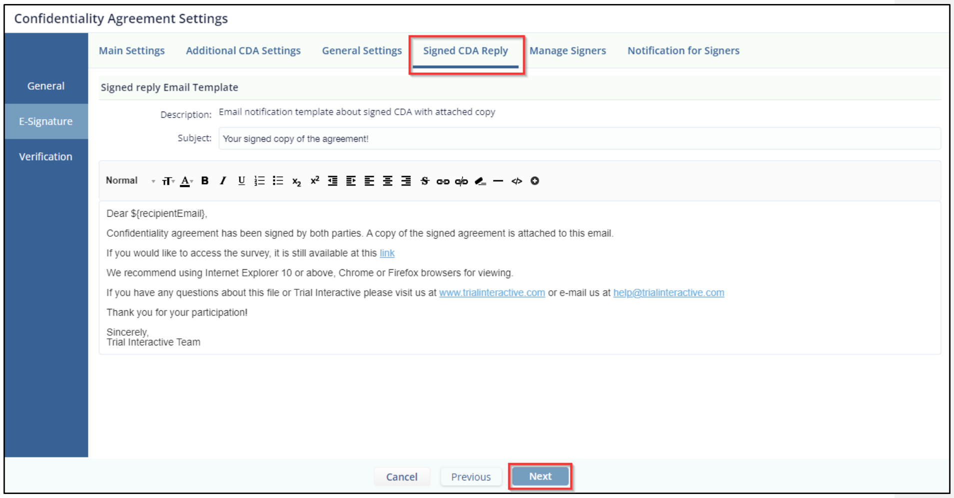
5. Click Next.



16.2.4 Manage Signers Page

From the Verification Email page, clicking Next takes you to the Manage Signers page which provides the following:

1. The pages: Main Settings, General Settings, Verification Email, Signed CDA Reply, Manage Signers (Highlighted), and Notification for signers on the top
2. The tabs: General, E-Signature (Highlighted), and Verification on the left
3. Two sections along with a heading Manager Signers:
    a. Available Signers: This provides a textbox to search for signers and the list of available signers for the CDA.
    b. Selected Signers: This provides a textbox to search for signers and display the list of added signers from the list of available signers.
4. The Cancel, Previous, and Next buttons.
5. Drag-and-drop the required signers form the Available Signers section to the Selected Signers section. Refer to the screenshot below.
6. Click Next.

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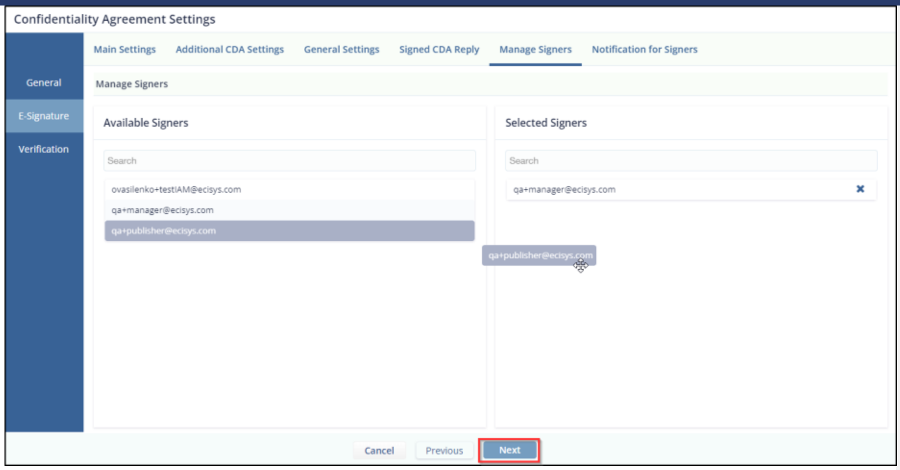

Note: The available Signers scroll-list displays only the list of Manager roles in E-Feasibility.

16.2.5 Notification for Signers Page

From the Manage Signers page, clicking Next takes you to the Notification Signers page which provides the following:

1. The pages: Main Settings, General Settings, Verification Email, Signed CDA Reply, Manage Signers, and Notification for signers (Highlighted)on the top
2. The tabs General, E-Signature (Highlighted), and Verification on the left
3. Two sections with a heading Signers notification Email Template:
    a. Subject: A textbox which allows the manager to set the subject for the notification of e-sign verification. The subject ${recipient Email} signed the confidentiality agreement! Log-in to review is set by default.
    b. Content: A text editor with a toolbar and a default template body for the email.
4. The Cancel, Previous and Next button.
5. Click Next.

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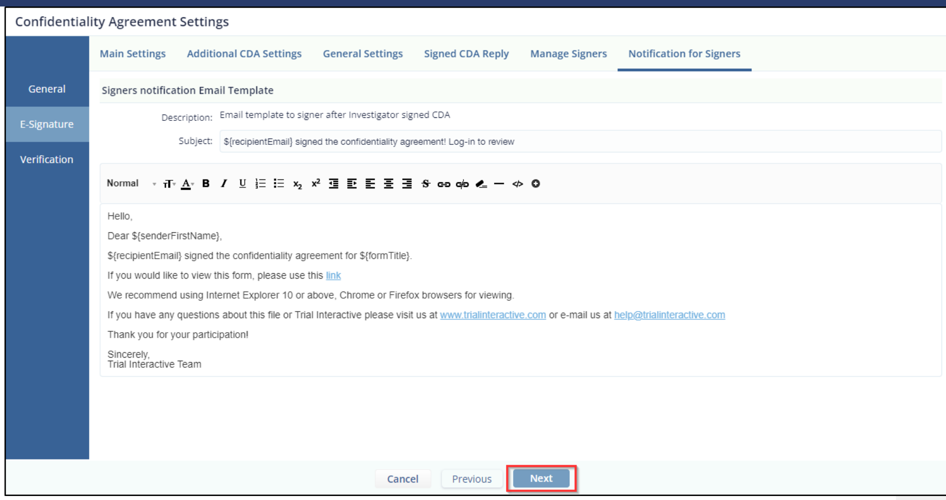

16.2.6. Manual Verification Page

From the Notification Signers page, clicking Next takes you to the Manual Verification page which provides the following:

1. Main Settings tab on the top left
2. The tabs: General, E-Signature, and Verification on the left
3. A message in the center as 'Manual verification is Disabled. Would you like to Enable manual verification of the agreement?' and
4. The Enable button below the message.
5. The Cancel, Previous, and Finish button.

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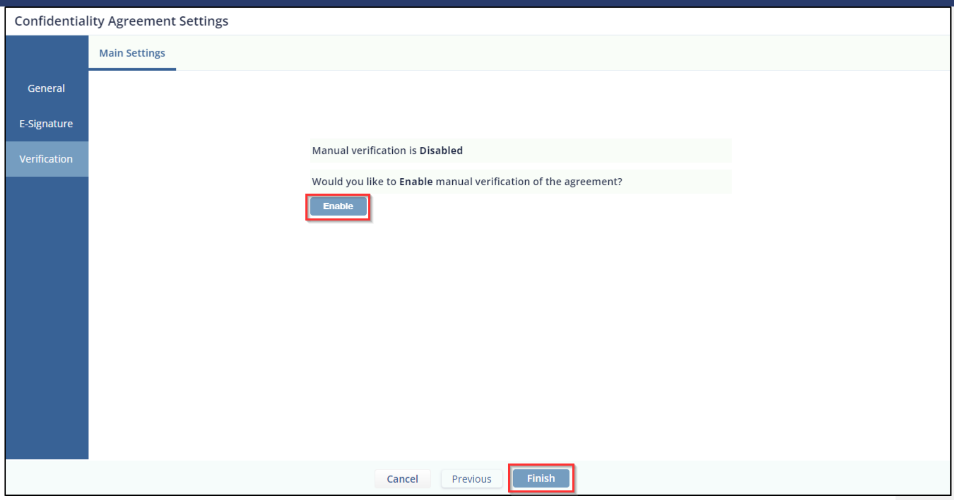

6. Click Finish to create the CDA. This CDA is attached in the survey link. The submitter will not be able to submit the survey unless CDA is signed by the CRO/Sponsor and Submitter.

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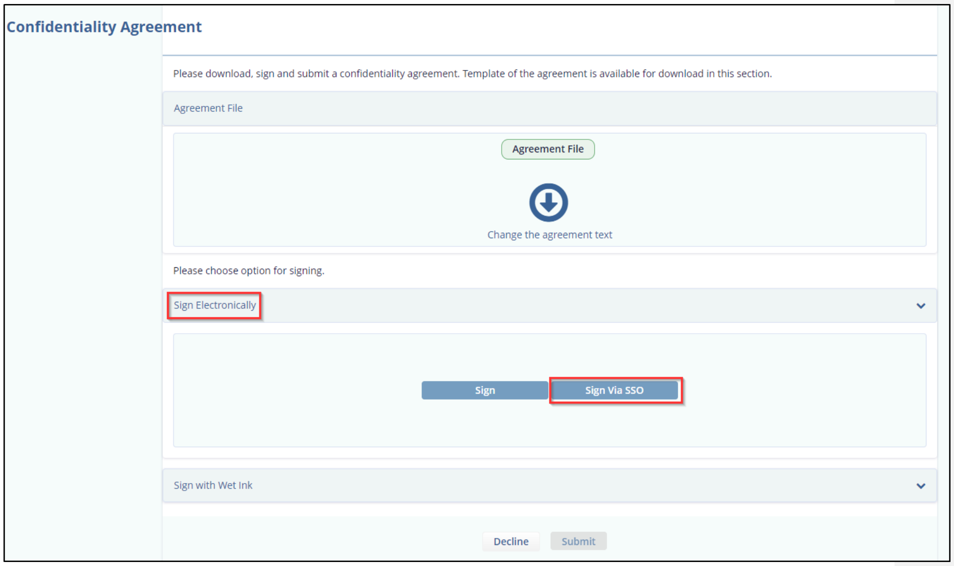
16.3 Digital Signature Signing Process

1. Manager sends a survey to submitter which includes the CDA in a survey link.

2. When submitter opens the link and the Confidentiality Agreement page opens in the browser at the submitter end as shown below.



3. Notice that the Sections on the left contain the CDA tab when CDA is created for the survey. Refer above figure.

4. Expand the section 'Sign Electronically' and there are two options available 'Sign' and 'Sign Via SSO'. Submitter clicks the Sign Via SSO button from the Sign Electronically section to sign the CDA.

5. A new window pops up where the user is directed to login Sign Via SSO credentials.

6. Click on Login Via SSO Credentials and enter the credentials for SSO for the organization.

7. The CRO/Sponsor receives an email for the CDA signing with a survey link. Open the email and click on the survey link and CDA will open. In Signature Details column, enter the credentials and fill in the other required details and click Sign.

8. When the CRO/Sponsor signs the CDA, the submitter gets a notification mail along with the PDF copy of signed survey. The link to survey is also available in this mail to complete the survey and then submit it. Below is an example of signature at the CRO/Sponsor end.

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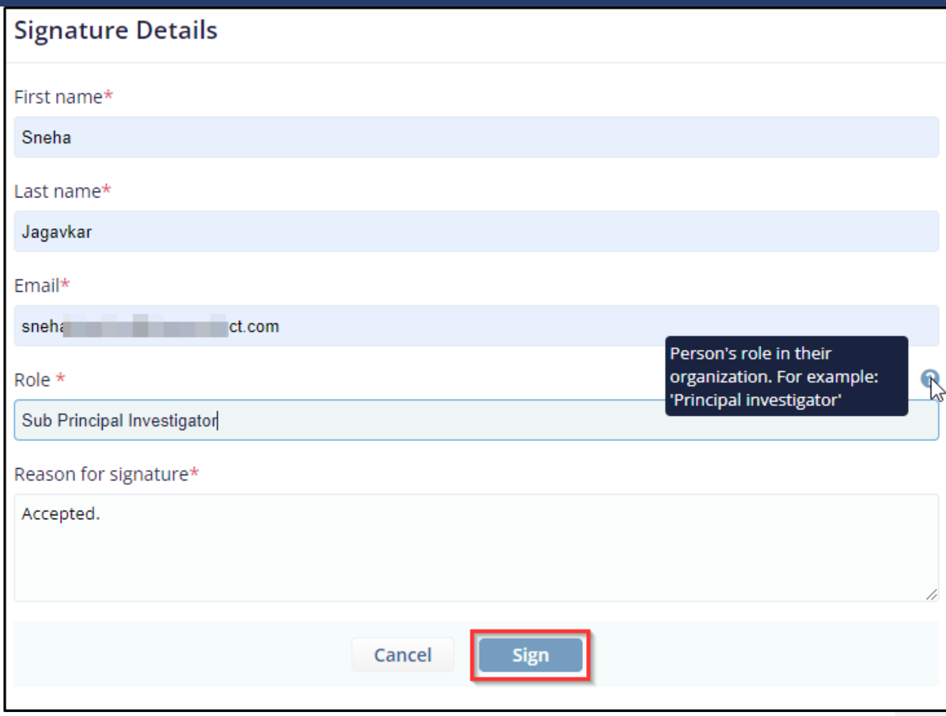
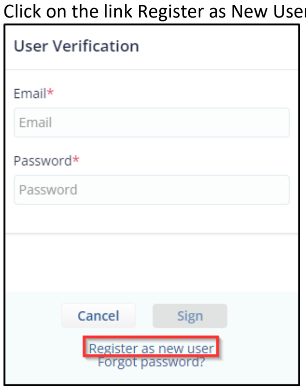


16.3.1 Registering for eSignature

When user is not a registered user then registration can be done through these instructions.

1. Click on the link Register as New User. Refer to the below screenshot.



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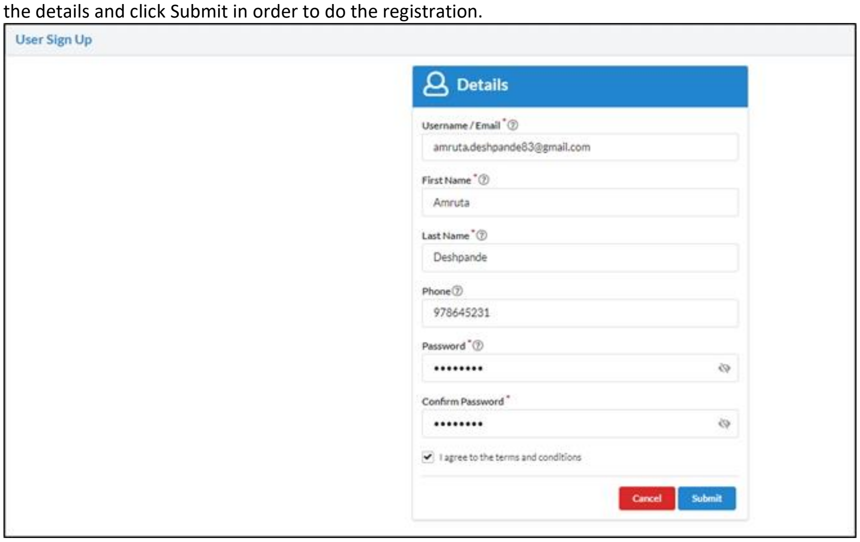
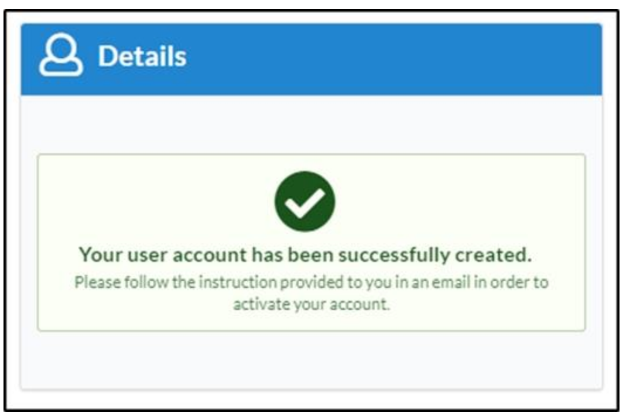
2. After clicking on Register as New User link, below User Sign Up screen appears. User needs to fill out all the details and click Submit in order to do the registration.



3. Upon successful registration, user receives acknowledgement like shown below.



4. Account activation email will be sent to the user. Open that email and click on the link provided in it. Once the user clicks on it, account activation happens, and user gets activation successful message on the screen like shown below.

Commented [SJ4]: As discussed with Katya and Ekatrina over skype, the esign, register new user and CDA options are disabled. So used the same screenshots as seen in previous OLH v2.5

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16.3.2 Password Reset for eSignature

1. If user forgets the password used while registering for the account, then click on Forgot Password? link to reset it. Clicking on that link will display Reset User Password screen. Enter registered email address and click Send.

2. Email will be received on the entered email address with a reset password link like shown below.

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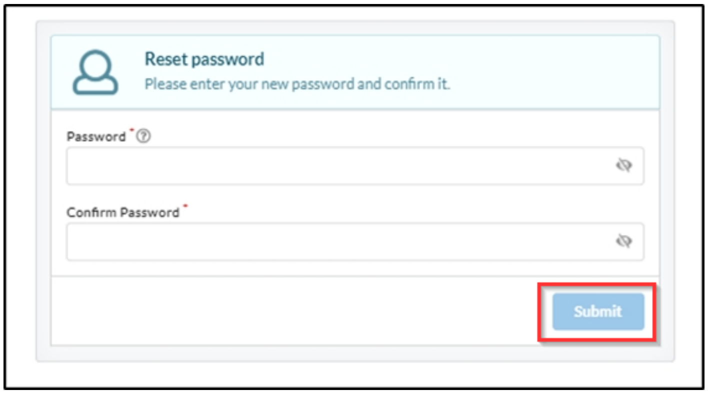
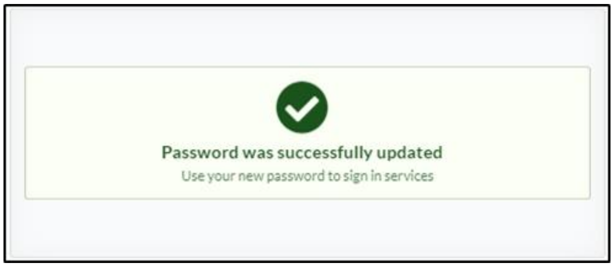
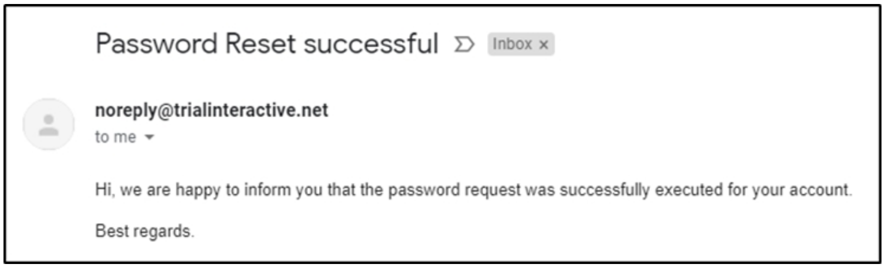
3. Click on the link and below screen will appear to reset the password.



Once the user enters the new password and resets it, a confirmation message will appear on the screen and also an email will be sent to the registered email address.





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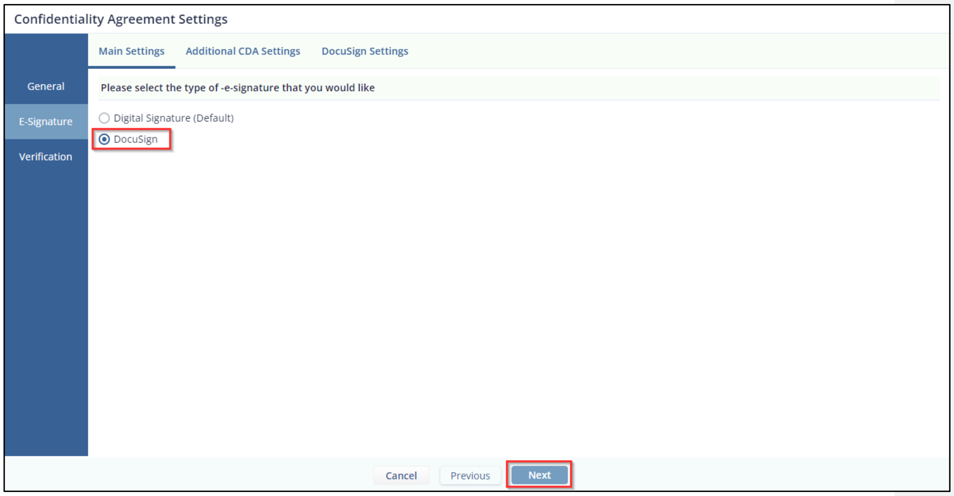
16.4 Enabling DocuSign

DocuSign is an application that is used for signing the CDAs.

To enable DocuSign:

1. From the Main Settings page of the E-Signature tab, select the DocuSign radio button to take you to the DocuSign Settings page.
2. Notice that when the DocuSign radio button is selected, all the pages those were visible for Digital Signature on the E-Signature tab are replaced by DocuSign page.



3. Click Next to take you to the Additional CDA Settings page that provides the following:
    a. Include Managers in to countersigning process for CDA with **Yes** and **No** radio buttons.
    b. Allow user to view the survey while sponsor is in the process of signing the CDA with **Yes** and **No** radio buttons.

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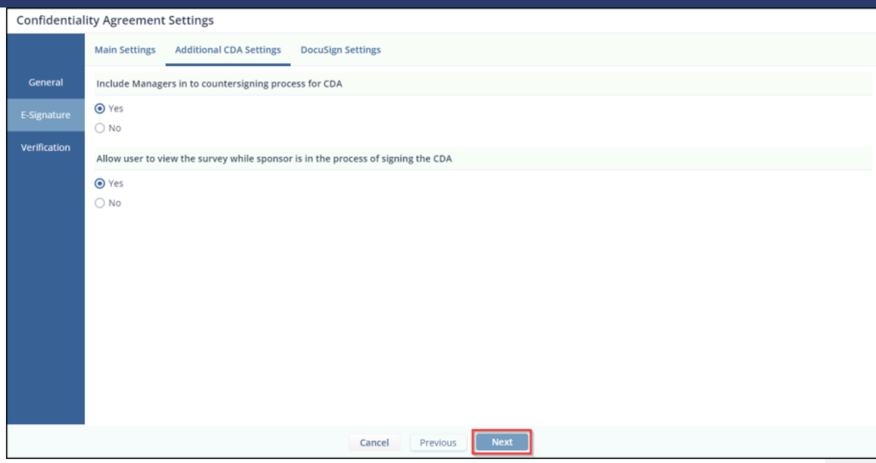
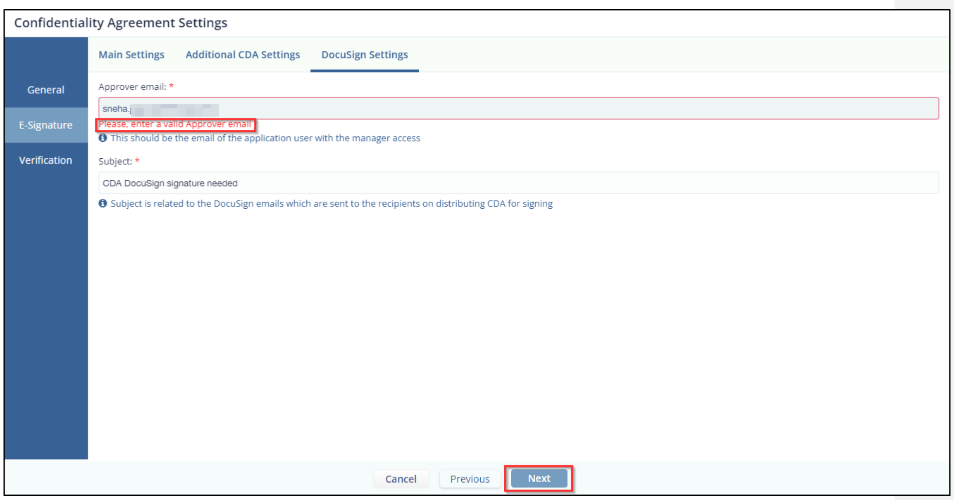


4. Click Next to take you to the DocuSign Settings page which provides the following:

    a. Approver email textbox with a red asterisk and tooltip below it. This allows you to enter the Approver email for the CDA approval.

    b. Subject with a red asterisk and tooltip. The subject heading 'CDA DocuSign signature needed' is displayed by default and is editable.

    c. Three buttons – Cancel, Previous, and Next. Refer to the screenshot below.



5. Click Next to take you to the [Manual Verification Page](#).

6. Click Finish. You are redirected to the Customize your DocuSign template page.

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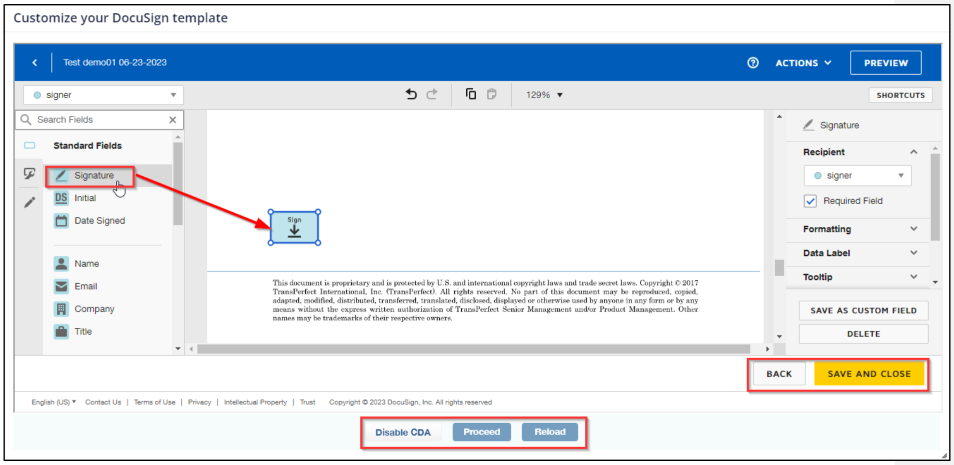
7. Drag and drop the Signature field from the Standard Fields section to the text area and click Proceed.



8. You are redirected to the Form Statistics page with CDA tab.

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16.5 DocuSign Signing Process

1. Follow steps 1-4 from the Digital Signature signing process.
2. The notification mail for signing CDA is sent to the approver added while creating CDA.
3. When the approver signs the CDA using DocuSign, the submitter gets a notification of CDA acceptance.
4. The submitter is now able to complete the survey provided in a link and submit it.

16.6 Enabling Manual Verification CDA

Manual Verification is used to sign CDA in Wet Ink. It allows the manager to specify the user outside the site (other than manger) to review CDA sent by a submitter. This reviewer has the ability to accept or reject CDA depending upon the topic.

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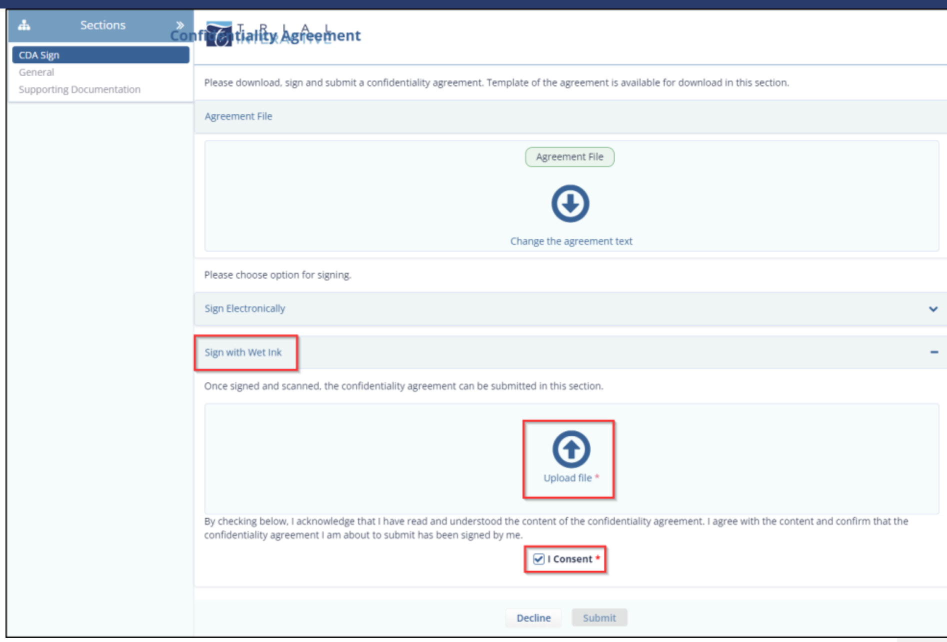
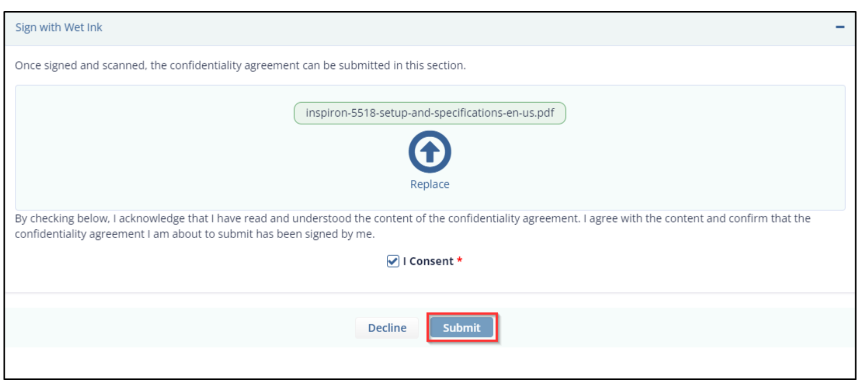


When submitter signs the CDA using Wet Ink and submit it, a notification is sent to an approver specified in Manual Verification who can further accept or reject it. Below is an example of signing CDA at the approver end.



The submitter gets a notification mail for CDA acceptance or rejection depending on which he/she can proceed to complete and submit a survey.

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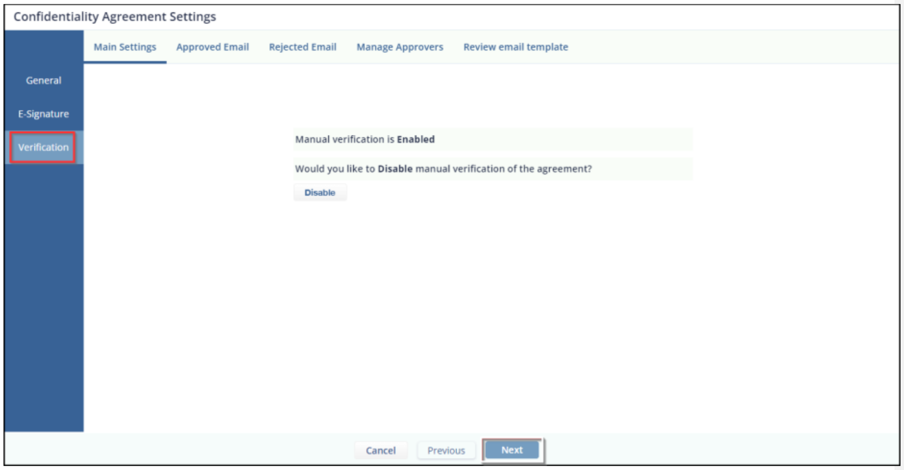
To enable Manual Verification:

1. From the Manual Verification Page, click the Enable button.
2. The Enable button changes to Disable and the following appears on the page:
    a. The pages: Main Settings (Highlighted), Approved Email, Rejected Email, Manage Approvers, Review email template on the top.
    b. The tabs: General, E-Signature, and Verification (Highlighted) to the left.
    c. The message Manual Verification is Enabled. Would you like to Disable manual verification of the agreement? along with the Disable button.
3. The Cancel, Previous and Next buttons. Refer to the screenshot below.



16.6.1 Approved Email Page

From the Manual Verification page, click Next to take you to the Approved Email page which provides the following:

1. The pages: Main Settings, Approved Email (Highlighted), Rejected Email, Manage Approvers, Review email template on the top.
2. The tabs: General, E-Signature, and Verification (Highlighted) to the left.
3. Two sections with a heading Approved Email Template:
    i. Subject: A textbox which allows the manager to set the subject for CDA acceptance.
    ii. Content: A text editor with a toolbar and a default template body for the email.
4. The Cancel, Previous and Next buttons. Refer to the screenshot below.

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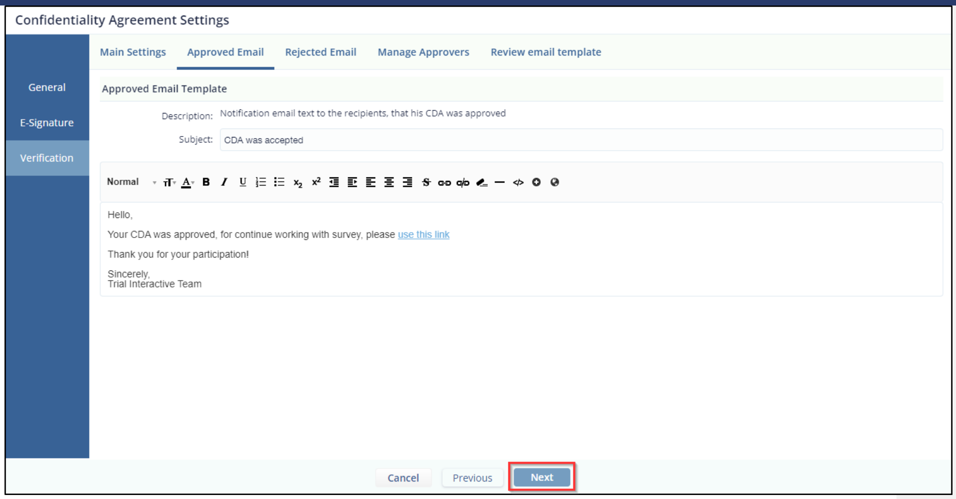

16.6.2 Rejected Email Page

From the Approved Email page, click Next to take you to the Rejected Email page which provides the following:

1. The pages: Main Settings, Approved Email, Rejected Email (Highlighted), Manage Approvers, Review email template on the top.
2. The tabs: General, E-Signature, and Verification (Highlighted) to the left.
3. Two sections with a heading Rejected Email Template:
    i. Subject: A textbox which allows the manager to set the subject for CDA acceptance.
    ii. Content: A text editor with a toolbar and a default template body for the email.
4. The Cancel, Previous and Next buttons. Refer to the screenshot below.

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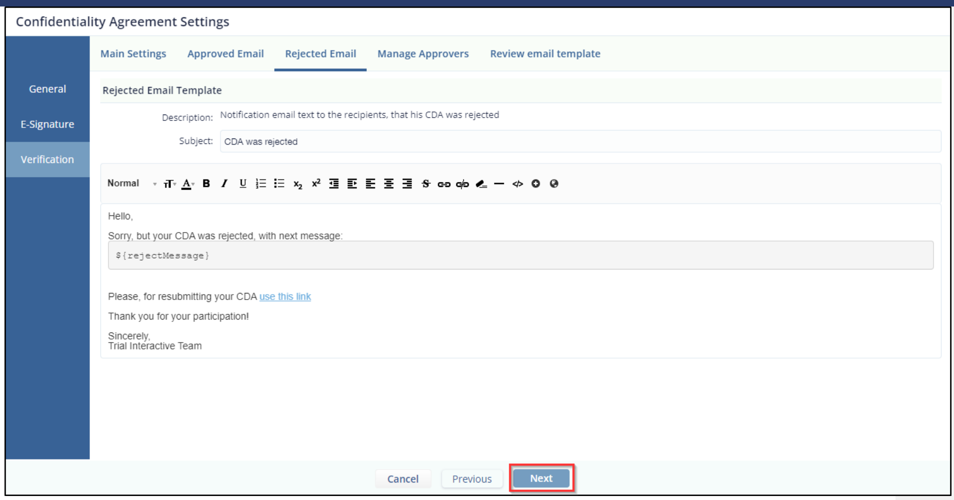

16.6.3 Manage Approvers Page

From the Rejected Email page, click Next to take you to the Manage Approvers page which provides the following:

1. The pages: Main Settings, Approved Email, Rejected Email, Manage Approvers (Highlighted), Review email template on the top.
2. The tabs: General, E-Signature, and Verification (Highlighted) to the left.
3. Two sections along with a heading Manager Signers:
    i. Available Approvers: This provides a textbox to search for approvers and the list of available approvers for the CDA.
    ii. Selected Approvers: This provides a textbox to search for signers and display the list of added approvers from the list of available signers.
4. Drag-and-drop the required approvers form the Available Approvers section to the Selected Approvers section. Refer to the screenshot below.
5. The Cancel, Previous and Next buttons. Refer to the screenshot below.

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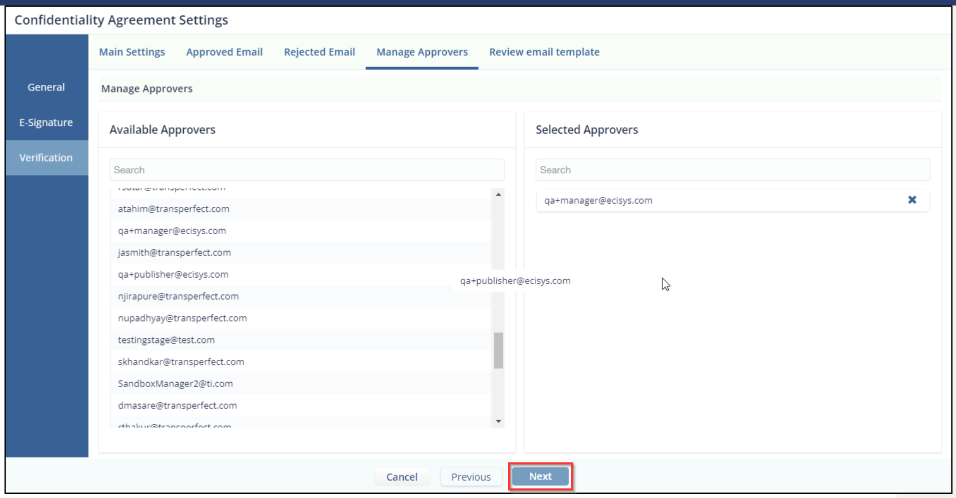

16.6.4 Review Email Template Page

From the Manage Approver page, click Next to take you to the Review email template page which provides the following:

1. The pages: Main Settings, Approved Email, Rejected Email, Manage Approvers, Review email template (Highlighted) on the top.
2. The tabs: General, E-Signature, and Verification (Highlighted) to the left.
3. Two sections with a heading Review Email Template:
   i. Subject: A textbox which allows the manager to set the subject for availability of new CDA review.
   ii. Content: A text editor with a toolbar and a default template body for the email.
4. The Cancel, Previous and Finish buttons. Refer to the screenshot below.

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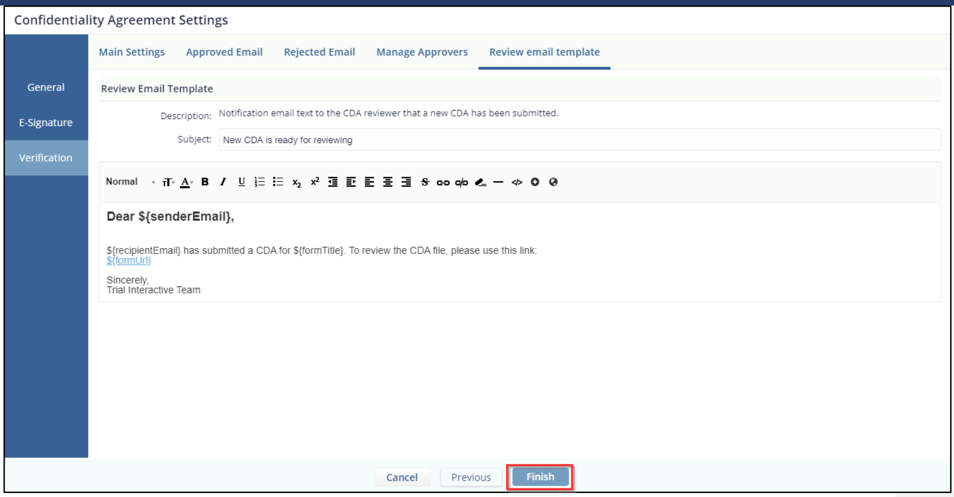

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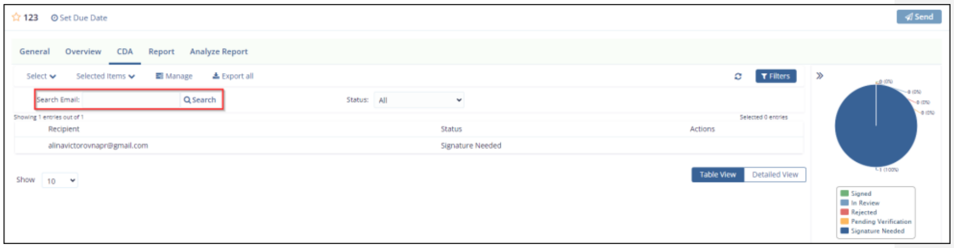
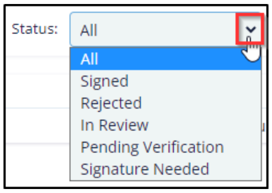
16.7 Viewing CDA

The CDA tab displays the list of all the recipients to whom the CDA is sent in a survey.



The CDA tab is divided into the following:

1. The Manage and Disable links below the toolbar
2. The left section which Provides:
    a. Search Email textbox: This allows you to search for the recipient.
    b. Status dropdown: This allows you to search for the CDA depending upon the status. The Status dropdown displays the options as below.



    c. Page List dropdown: This allows you to manage the recipient's entries in a table.
    d. Refresh icon: This allows you to reset all the changes to the form.
    e. Download arrow: This allows you to export CDAs. Proceed to section Export CDA for detailed information.
3. The middle section: Provides a table which display the Recipients, Status of CDA and Actions that are performed on the CDA.
4. The right section: Displays the Pie Charts for the CDA status.

16.8 Actions on CDA

When the submitter signs CDA and sends it to the Manager for signing, the manager not only gets notified about the signature in mail but also can view and sign CDA from the CDA tab. The manager can perform the following actions on CDA:

- Preview and Sign CDA.

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- Sign CDA
- Export CDA

16.8.1 Preview and Sign CDA

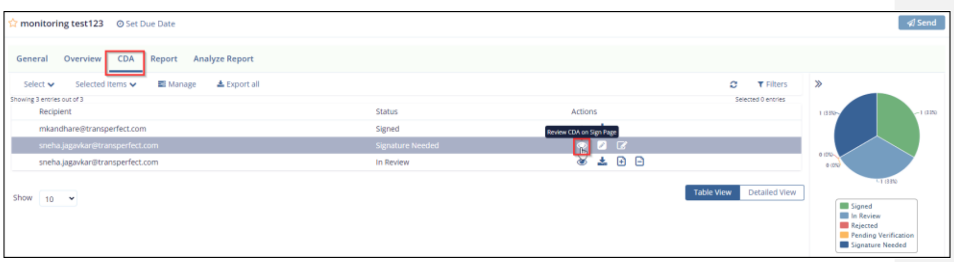
Click the eye icon below in the Actions column of the recipient to review and sign CDA. The manager can perform the following actions on CDA for different Statuses:

1. Signed: When the status is signed, the Actions column displays two buttons: Preview and Export. The manager can preview and export CDA.
2. Signature Needed: When status is Signature Needed, the Actions column displays two buttons: Preview and edit. The manager can preview and sign CDA.
3. Rejected: When the status is signed, the Actions column displays two buttons: Preview and Export.

16.8.2 Sign CDA

You can sign CDA in the following ways:

1. Sign using Preview icon: Clicking Preview icon opens the document and allows you to sign CDA as shown below:



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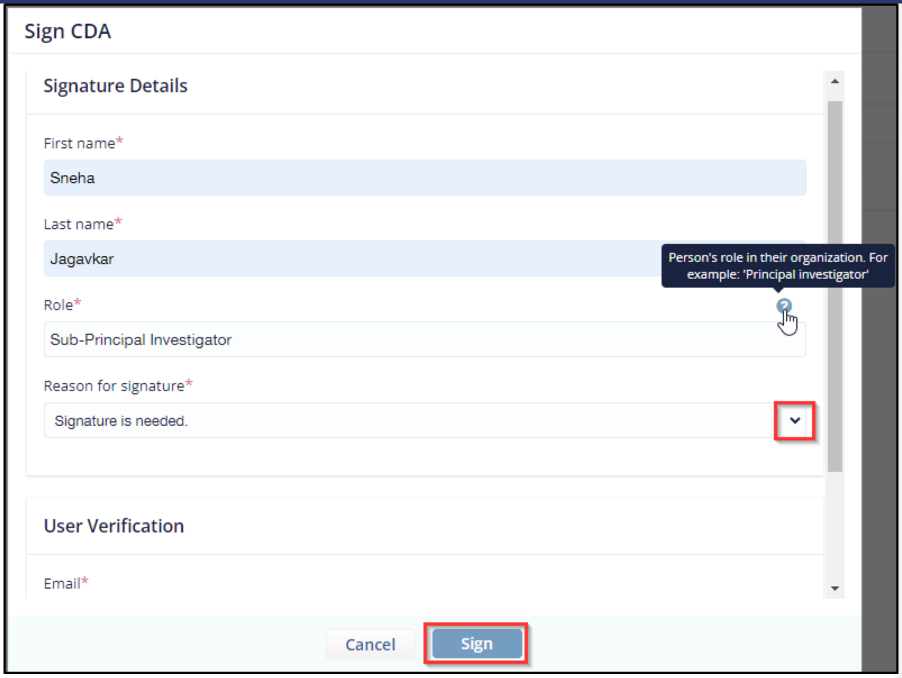

2. Sign using Edit icon: Clicking edit icon opens the CDA Signature page to allow you to sign CDA as shown below.

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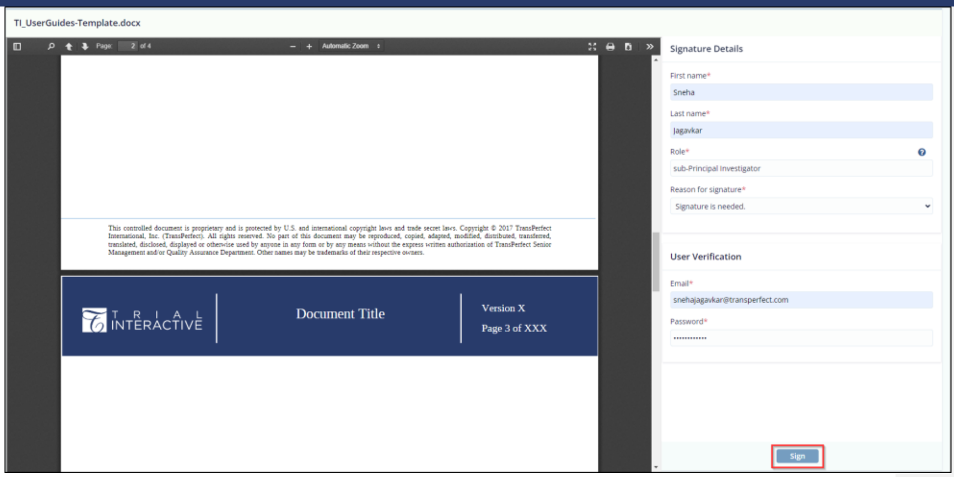

16.8.3 Export CDA

Click the blue down arrow from the Action column of required recipient to export CDA in PDF.

16.9 Export All CDA

Export All CDA allows you to export CDA of all recipients of the Form. To export all CDA, follow the below steps:

1. From the Form Statistics of an opened survey, click the CDA tab.
2. Click Export All (blue down arrow) displayed in the bar below.

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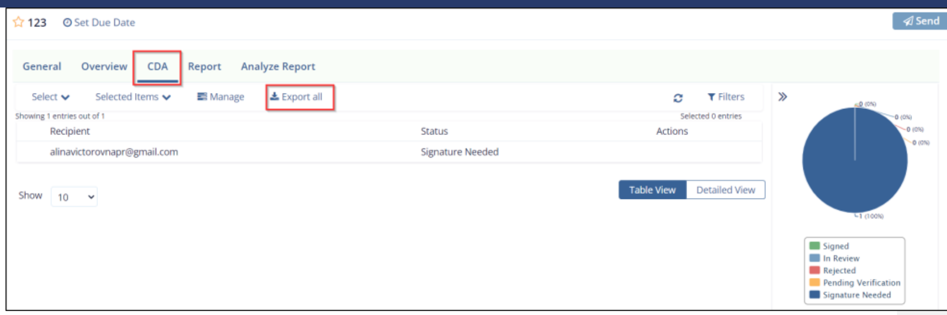


3. The CDA file name template dialog box opens which provides two sections:

    a. Name Template: This section contains:

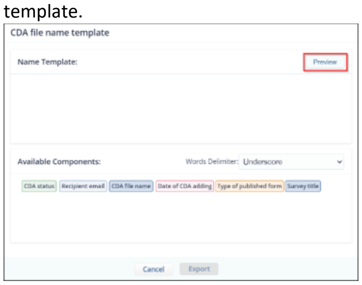
        i. A long textbox to add the components of CDA file name template

        ii. Preview icon to view the CDA file name template.

    b. Available Components: This section contains:

        i. The list components that are used for CDA file name template.

        ii. The Words Delimiter dropdown to separate and identify components of CDA name template.



    c. The Cancel and Export button. Export button is deactivated by default and activated only when you add components from the Available Components section to the Name Template section.

4. Drag-and-drop the components from the Available Components section to the Name Template section which you want to display for CDA file name template. Refer to the screenshot below.

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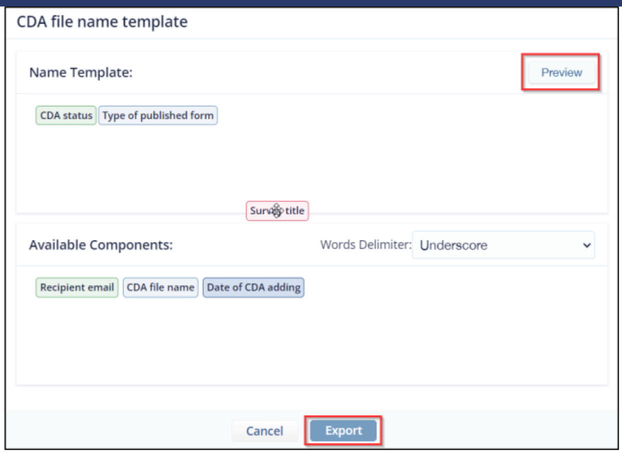
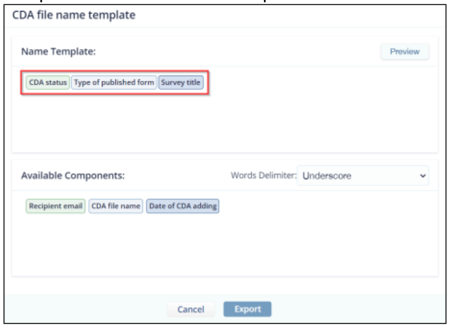


5. Click the Preview icon from the Name template section to view the CDA file name template as per added components. Below is an example of CDA file name template preview.



6. Notice that the Preview icon changes its name from Preview to Edit Template and the CDA file name template is displayed as per the components added.

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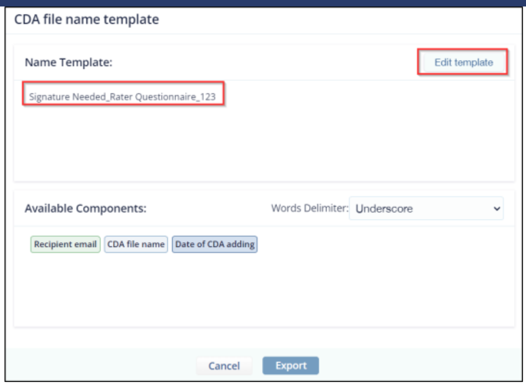
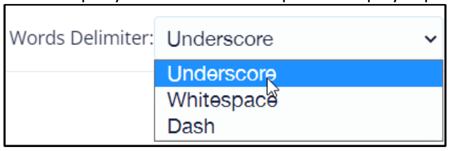
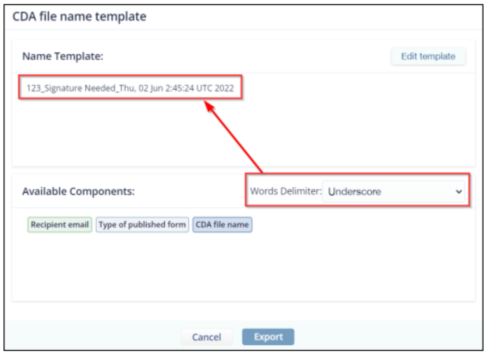


7. Click the Words Delimiter dropdown from the Available Components to change the delimiter between words as per your choice. The dropdown displays options as shown below:



Below is an example showing difference between delimiters- Underscore, Whitespace and Dash from the list.



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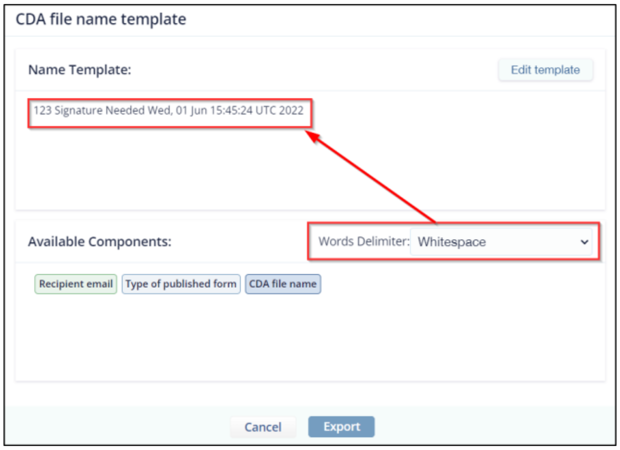

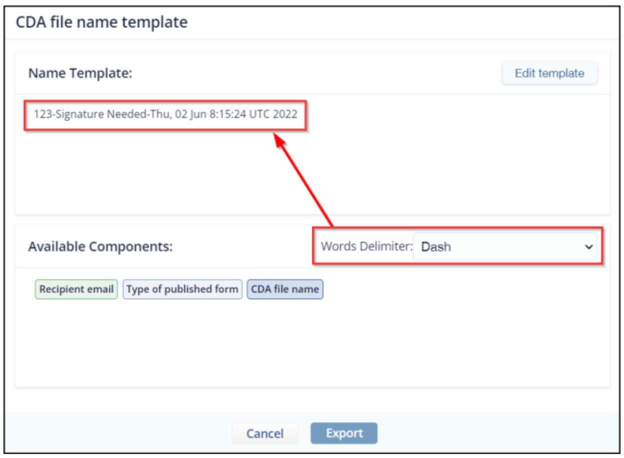

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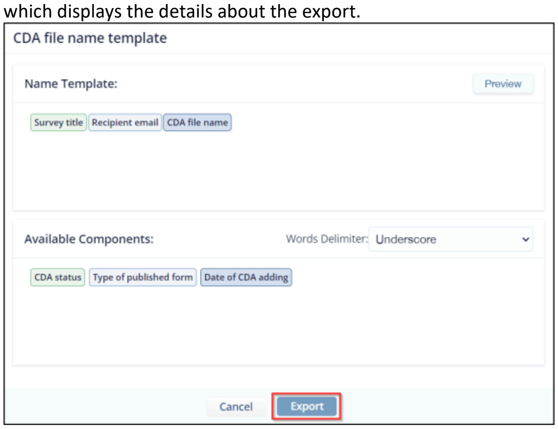
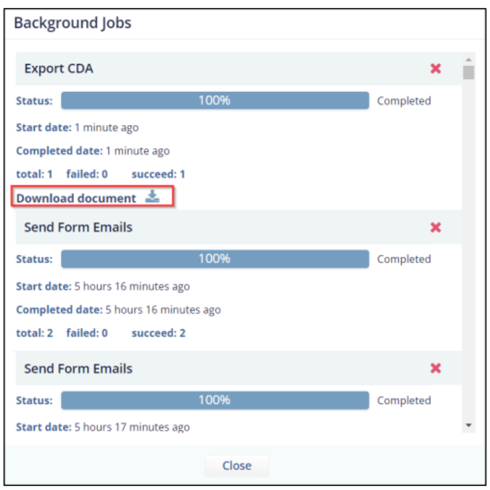
8. Once all settings are done, click Export to export CDA of all recipients. The exports start in the Background which displays the details about the export.



9. Click the Download Document link from the Background Jobs dialog box to download CDA export. Refer to the screenshot below.



Note: You can also export CDA of a particular recipient by clicking the down arrow in the Actions column next to the recipient.

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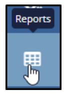
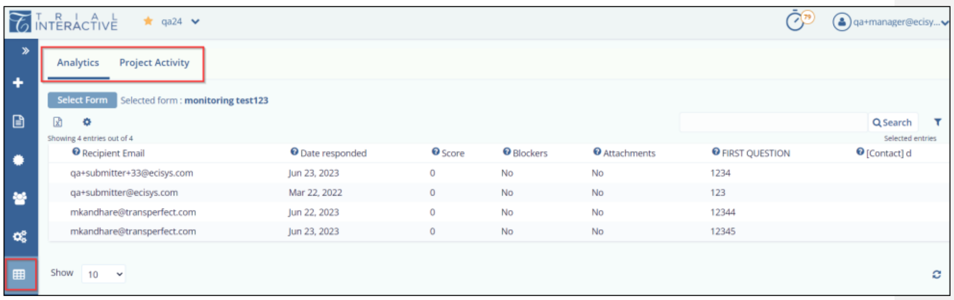
17. Reports

Report displays all activities of the form. Click the Reports 

Icon displayed in the left panel. You can also customize the report as per your choice. Report Menu is divided into following tabs:

1. Analytics
2. Project Activity



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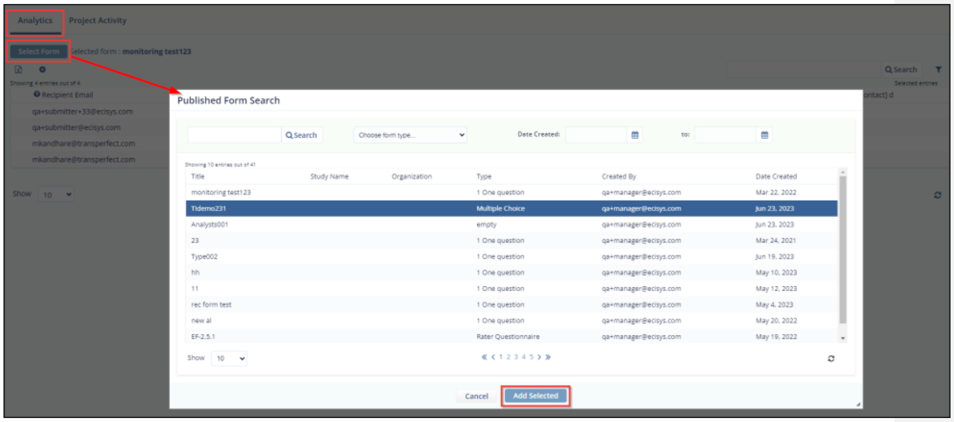
17.1 Analytics

This allows you to customize and view report of the Form that is selected.

To view and customize Report:

1. Click Reports from the Menu Bar.
2. From the Analytics tab, click the Select Form button. The Published Form Search dialog box opens which displays the list of published forms.
3. Select the Form from the list and click Add Selected button. The Add Selected button is deactivated by default and activated only when the form is selected.



4. You are redirected to the Reports page and the selected Form Title displays in the textbox next to the Select Form button.
5. The selected form opens and displays the table with the Form metadata and questions and the following icons are displayed above the table:
   a. Export Form icon
   b. Report Configuration (Gear icon)
   c. Search icon
   d. Filter icon.

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Each of these are discussed in subsequent sections.

1. Select the option form the Show  dropdown from the bottom left corner of table to manage the list of Form entries in the table.

2. Click the refresh  icon to reset the changes and refresh the page.

Note: The table displays the list of only responded surveys for a particular form.

17.1.1 Export Form

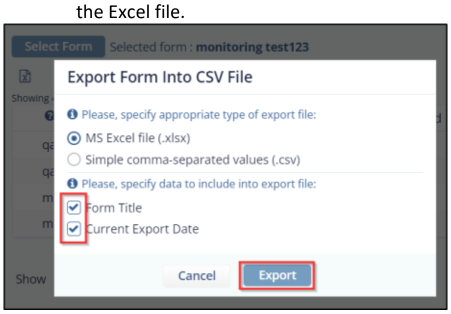
This allows you to export the form into CSV file.

To export a Form:

1. Click the Export Form  icon on the toolbar of a Reports dashboard. The Export Form into CSV File dialog box opens which display the following checkboxes:

    a) Form Title: Selecting this checkbox displays the form title in an Excel file.

    b) Current Export Date: Selecting this checkbox displays the current date and time of the export in the Excel file.



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2. Select the required options and then click Export. The exported form opens in the excel file which displays all the details of the form. Notice that the selected checkboxes also display in the file.

	A	B	C	D	E	F	G
1	Form Title	monitoring test123					
2	Export Date	Jun 30 2023 16:27:46 Greenwich Mean Time					
3	Recipient Email	Date responded	Score	Blockers	Attachments	FIRST QUESTION	[Contact] d
4	qa+submitter+33@ecisys.com	Jun 23 2023 10:30:29 Greenwich Mean Time	0	false		1234	
5	qa+submitter@ecisys.com	Mar 22 2022 16:17:59 Greenwich Mean Time	0	false		123	
6	mkandhare@transperfect.com	Jun 22 2023 11:03:41 Greenwich Mean Time	0	false		12344	
7	mkandhare@transperfect.com	Jun 23 2023 08:48:41 Greenwich Mean Time	0	false		12345	

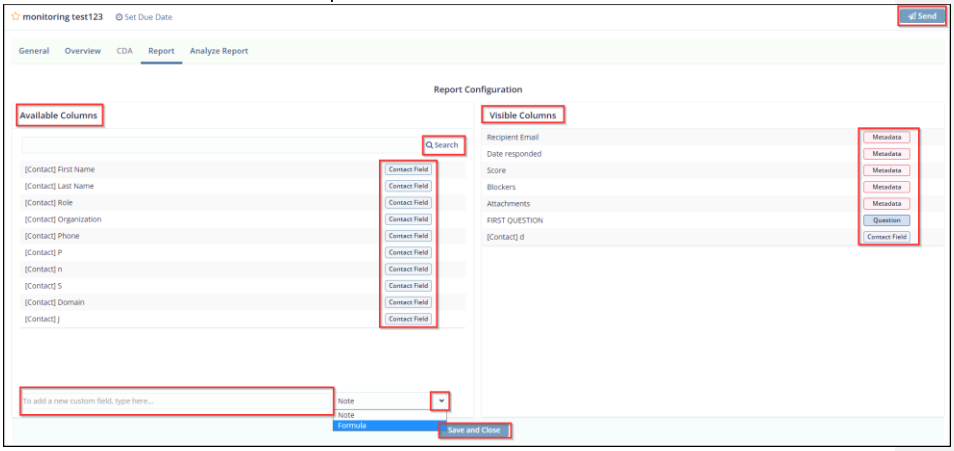
17.1.2 Report Configuration

Clicking the Gear 

icon on the toolbar of the Report dashboard opens the Report Configuration dialog box which allows configuring the Report.

Report Configuration dialog box contains

- Available Columns: This panel contains a Search box to search for the column fields and the cells of Contact Field type with the button in blue color. These contact fields are defined in Settings→Contact Settings.
- Visible Columns: This panel displays the cells of Metadata type in Red color and the cells of Question type in Violet color. Refer to the screenshot below.
- Save and Close button and
- A textbox with a dropdown to add new field with its heading for a Note, or Formula to the report along with a '+' icon in the Available Columns panel.



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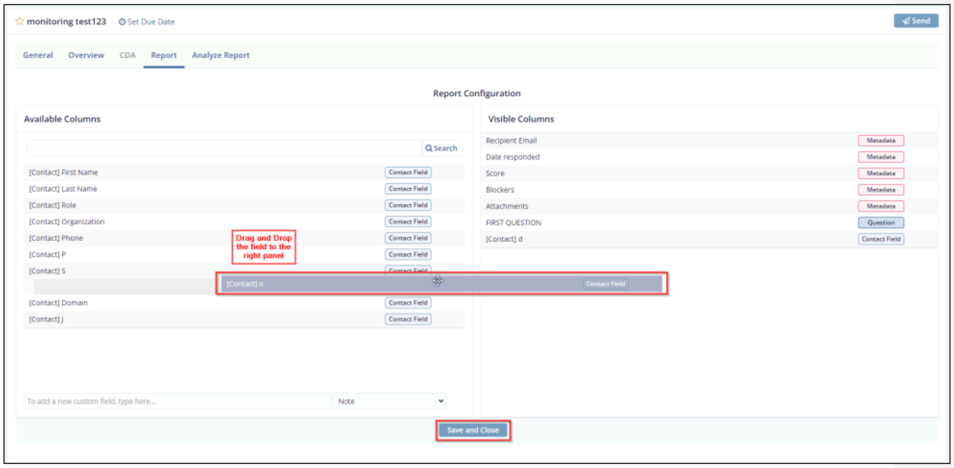
Adding Fields from Available Columns to Visible Columns

Drag and drop the field of your choice form the Available Columns panel to the Visible Columns panel. The report displays these added fields in the table and also in the excel file which is exported.

You can also change the sequence of the fields by dragging and dropping the fields in both the panels.



Adding Custom Fields as Note

Follow the below steps to add a new custom field as Note:

1. Type a field name in the textbox below the Available Column fields.
2. Select Note form the dropdown. A + sign appears next to the dropdown.
3. Click the Plus  icon to add the field to the list.
4. The new added Note field appears in a green color with edit icon and cross next to it.

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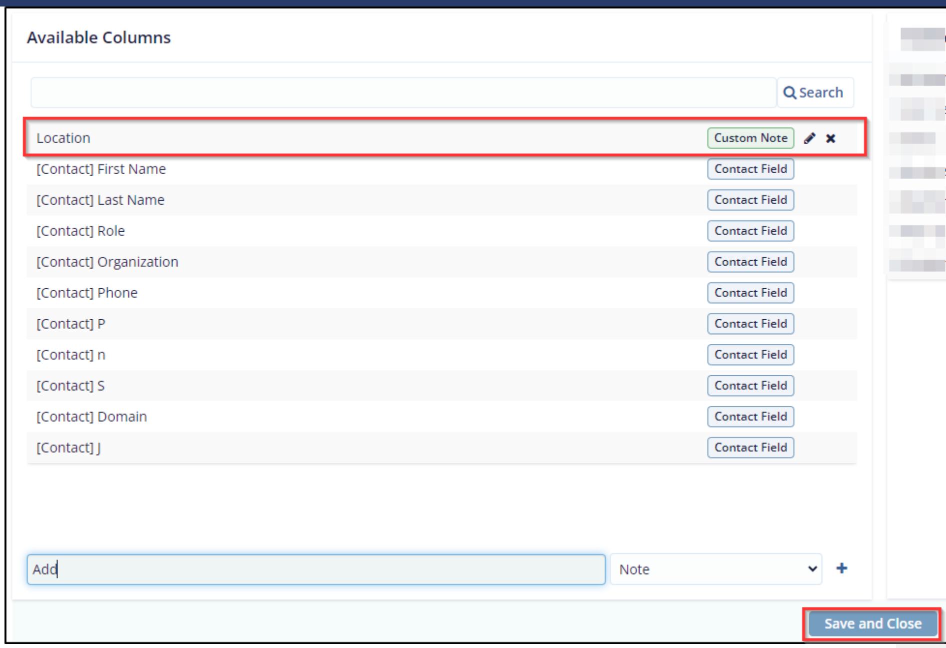
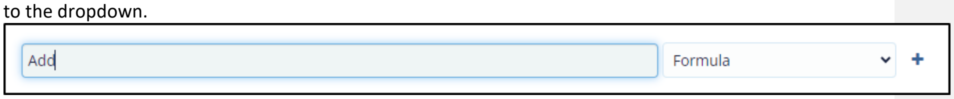


Adding Custom Fields as Formula

1. Enter the custom field name in the textbox and select Formula form the dropdown. A + sign appears next to the dropdown.



2. Click + icon to add a field to the list. The Formula Editor dialog opens which displays two panels:
    a. The search box, Column Name and Column Id the fields in the left panel.
    b. The formula calculator with the functions in the right panel.
    c. The Cancel and Apply buttons. Refer to the screenshot below.

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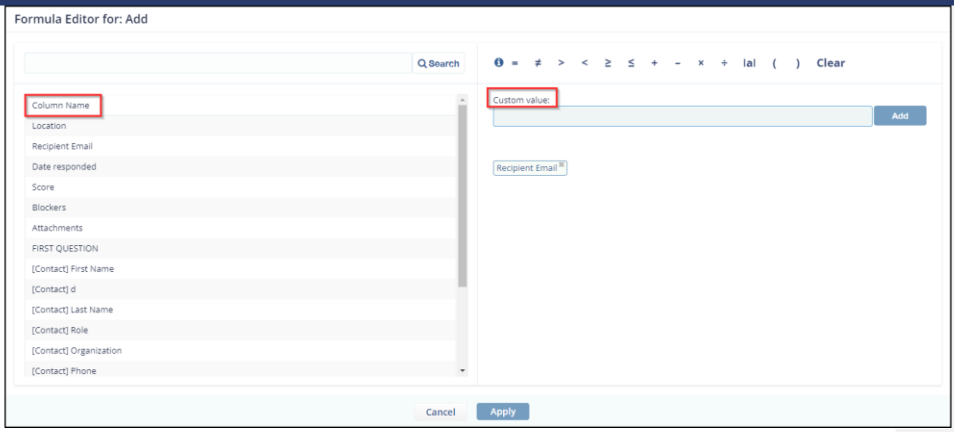
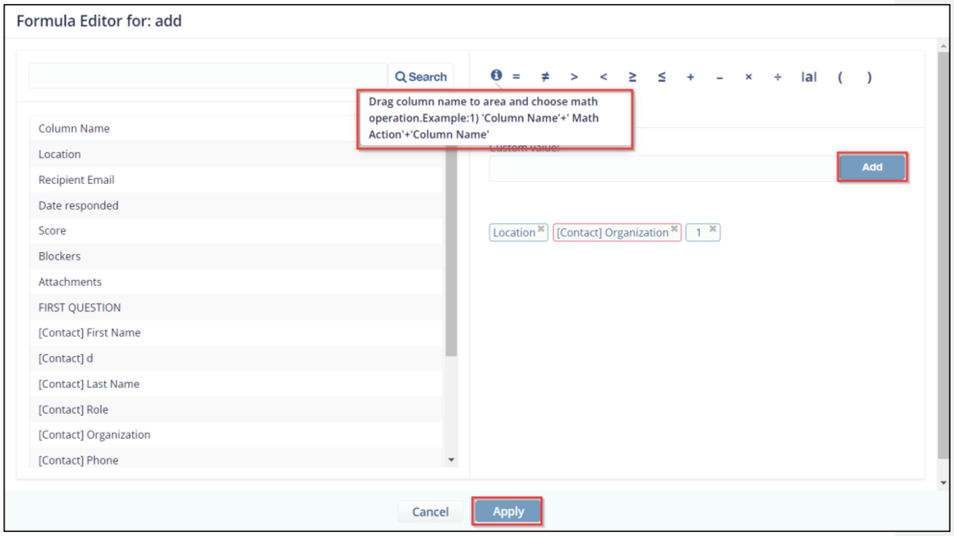


3. Click the Column Name in the left panel to which you want to apply formula. The Column Id of the selected question displays in the right panel (editor). You can also search for the Column Name in the search box above the Column Name.



4. Create formula for the question using the functions.

5. Below table defines the symbols of the Formula editor.

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Symbol	Function	Symbol	Function
=	Equal to (==)	+	Add
≠	Not Equal to (!=)	–	Minus
>	Greater than	×	Multiply
<	Smaller than	÷	Divide
≥	Greater than equal to	lal	Percentage %
≤	Smaller than equal to	(...)	(your condition). You can define your own conditions in the formula.

6. Click Apply. The Report Configuration page opens. The Formula as a column is added to the Visible Columns which is displayed in Orange color along with the edit icon and a cross. Refer to the screenshot below.
7. Click Save. The Formula displays the answer in True or False for the appropriate result in the Report table.

Note:

a. On creating custom field additional property for the survey, all surveys for specified form are able to store some information in new property.

b. The new added custom fields are editable which allows you to enter the value for the field dynamically.

17.1.3 Search

You can search for the report of particular Recipients by clicking Search 

icon on the toolbar above the Report table

You can search for the form reports with the Recipient's name in the search box. Refer to the screenshot below.

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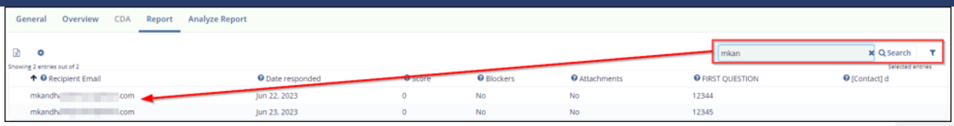
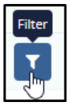


17.1.4 Filter

Filter allows you to search for a particular form report by applying the filter to the columns in the table.

To apply Filter:

1. Click Filter  icon on the toolbar. A textbox under each column appears to search the report depending upon the filter option.
2. Enter the filter criteria and hit Enter. Refer to the screenshot below.

17.2 Project Activity

Project activity displays all the activities and the updates that are performed on a particular form in a Project. The Page contains the following:

1. The Filters: Click the Show Filters dropdown menu to view the following filters:
   - ID
   - User and
   - Date and
   - Show Results in the top left corner.
2. The Report Parameter  icon next to the filters to allow you to download the Report.
3. The Table displaying the activity on a from which displays following columns:
   - Id: The Id of an activity performed on a Form.
   - User: The Name of the user who performed the activity on a Form.

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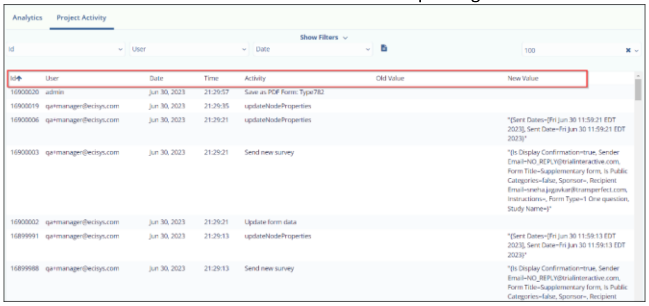
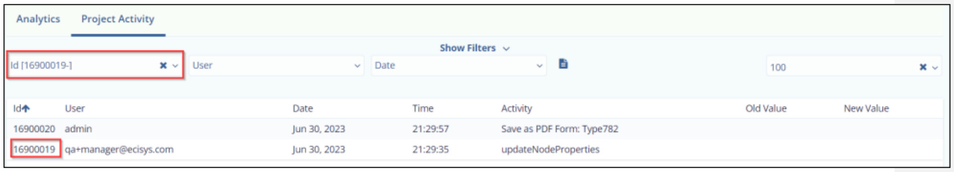
- Date: Date on which the activity is performed
- Time: Time at which the activity is performed
- Activity: Details of the activity that is performed
- Old Value: The old value in the form before updating it.
- New Value: The new value in the form after updating it.

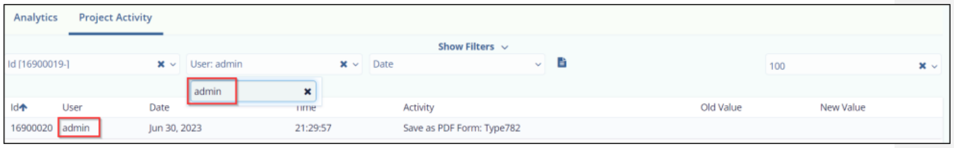


17.2.1 The ID, User and Date Filters

The ID filter provides two text boxes: ID from and ID to which allows you to search the activity depending upon the ID.



The User filter provides a textbox which allows you to search the activity by Username.



The Date filter provides two text boxes: Date from and Date to which allows you to search the activity depending on the Date.

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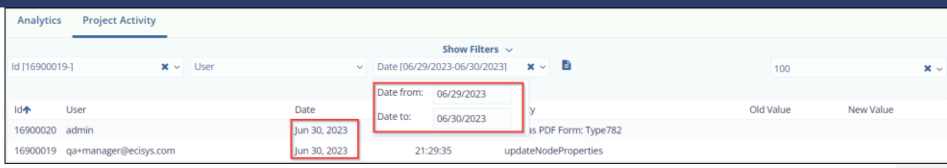

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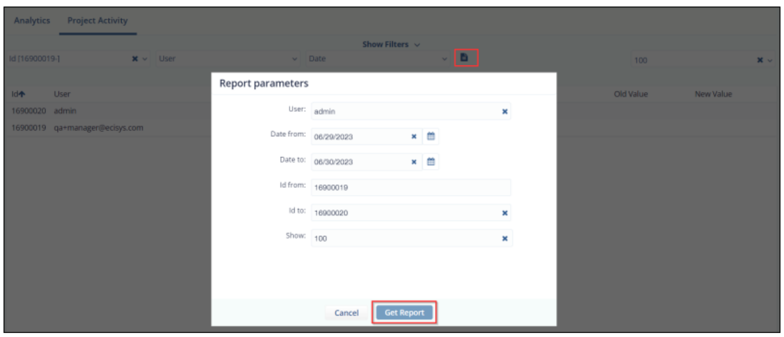
17.2.2 Report Parameters

Reports Parameter allow you to download the Project Activity Report depending upon the filters applied in the Report Parameters.

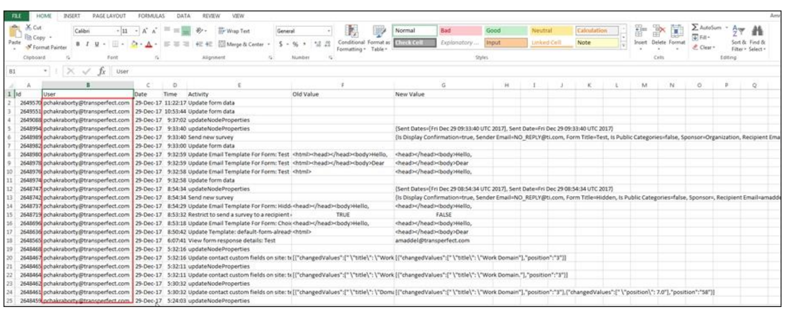
To get the Report:

1. From the Project Activity tab, click the Report Parameter icon. The Report Parameters dialog box opens.

2. Enter the parameters for which you want the Activity Report. Refer to the screenshot below.



3. Click Get Report. The report gets downloaded in .xslx file displaying the records as per the parameters entered.



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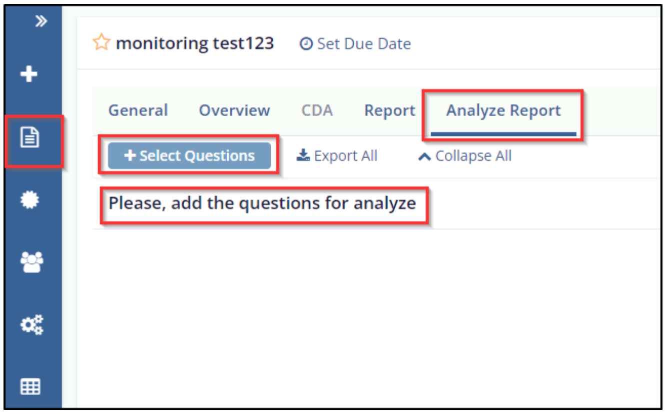
18. Form Analytics

This allows user to customize the view of the responses received to this form by changing the chart types which are 'Bar', 'Column', 'Donut', and 'Pie'.

Select '**Forms**' tab in the left pane and click on '**Analyze Report**' tab.

Then select option '**Select Questions**' for configuring the report.



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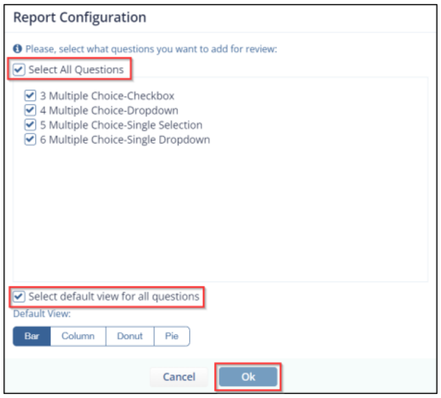
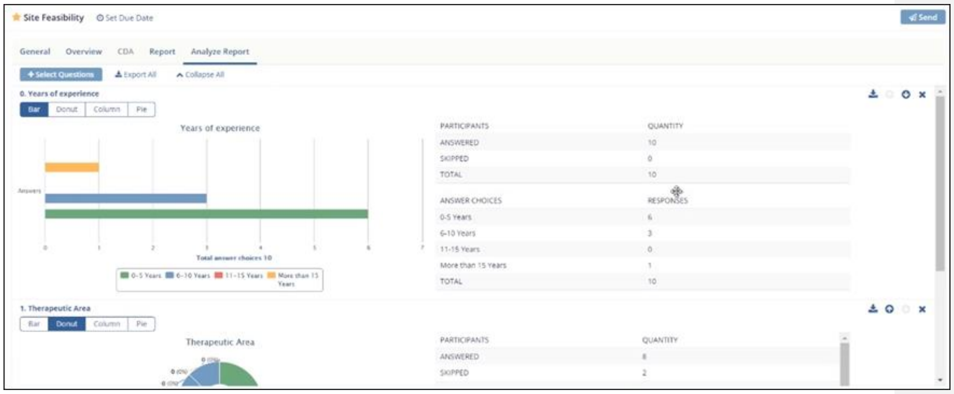
1. Check the '**Select All Questions**' box to select all the questions and just select specific desired questions.
   Note: Also, the box of 'Select default view for all questions' enables user to select the desired type of chart in which the user needs to view the graphical representation.
2. Click **'Ok'** to save the selection and close the window.



Report is configured based on the selections done.



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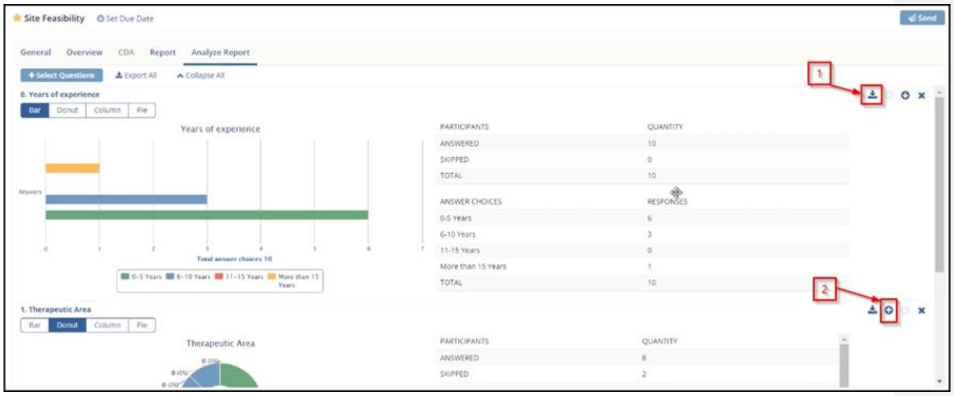
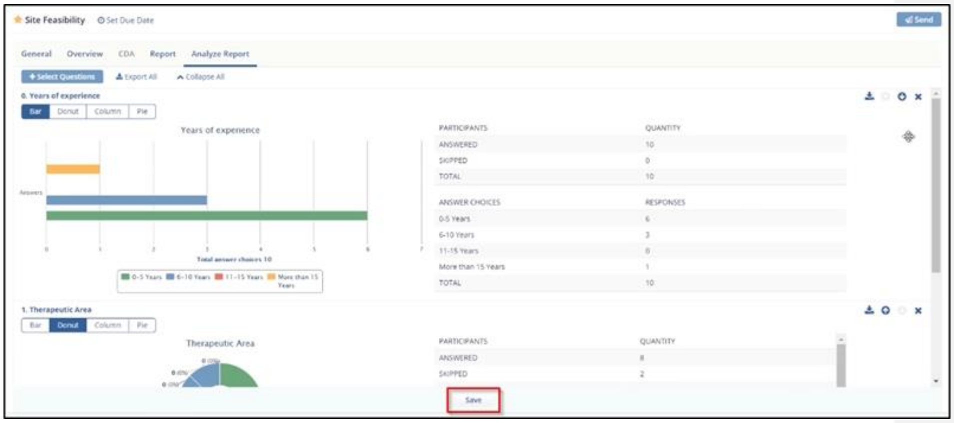
Report can be downloaded, and the sequence order of the questions can also be changed. Select #1 option from the following image to download the report and select #2 for changing the sequence order of the questions.



Click **Save** at the bottom to save the report.



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