



# TI eFEASIBILITY v2.6 - MANAGER USER GUIDE

Version 1.0





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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.

TNTERACTIVE	T R I A L INTERACTIVE
Username Password Remember me on this computer	Password Reset We'll email you a link to a page where you can easily create a new password. To assure our messages are not accidentally filtered out, please add support.demo@trialinteractive.com to your Address Book or Safe Sender List. Enter your email:
Forget Your Preseword? Forget Your Preseword? Enabling Trial Collaboration in the Cloud	Send request Back to the login page

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	<ul> <li>E-Feasibility defines below mentioned roles for the users in a project:</li> <li>Administrator: Administrator has access to all functionalities and projects, including user permission management.</li> <li>Manager: Manager has access to all the functionalities within a project</li> <li>Editor: Editor has the ability to create and edit forms in a project.</li> <li>Publisher: Submitter is a registered user contact with the ability to complete a survey within a system.</li> <li>Submitter: Publisher has the ability to send and review responses for created forms.</li> </ul>
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.



Every E-feasibility Dashboard is broadly divided into:

- 1. <u>Title Bar</u>
- 2. Dashlets
- 3. Toggling Menu Bar

### 7.1 Title Bar

- The Title Bar consists of the following:
- 1. <u>Logo</u>
- 2. <u>Project Dropdown</u>
- 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  $\stackrel{freq}{\Rightarrow}$  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.



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  $\uparrow$  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.

r N	TERACTIVE	eFeasibility v2.6 – Manage	r User Guide	Version 1.0 Page 18 of 197
	Latest Responses			View more
	Title	Date Last Updated	Number of Respons	ses
	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
------------------	-----------

E	RAN ERAN			eFea	asibility v	2.6 – Manag	ger User (	Guide		Vers Page	ion 1.0 e 19 of 19
ī	NTERACTIVE	🚖 qa24 🖌								• ه	a+manager@ecisy
1	General Form	s Supplementary Form	5								
	Showing 10 entries ou	t of 100									Q Search T
	Title	Stud	y Name	Organization	Туре	Created By	Date Created	Date Updated	Status	Responses	Actions
1	👷 🛛 QA analys	ts11			Rater Questionnaire	qa+manager@ecisys.com	Jun 20. 2023	Jun 20. 2023	published	0	
	🔅 Type001				Rater Questionnaire	qa+manager@ecisys.com	Jun 19, 2023	Jun 20, 2023	published	0	
	😟 🛛 QA analys	ts11			Test Form	qa+manager@ecisys.com	Jun 20. 2023	Jun 20, 2023	published	0	
	🔅 Test dem	01			empty	qa+manager@ecisys.com	Jun 20, 2023	Jun 20, 2023	draft	0	
	☆ Type002				1 One question	qa+manager@ecisys.com	Jun 19, 2023	Jun 20, 2023	published	5	
	対 Test 09				1 One question	qa+manager@ecisys.com	Jun 19, 2023	Jun 19, 2023	published	0	
	🔅 Test89				empty	qa+manager@ecisys.com	Jun 19, 2023	Jun 19, 2023	draft	0	
	🔅 monitorin	g test123			1 One question	qa+manager@ecisys.com	Mar 22, 2022	Jun 19, 2023	published	1	
					1 One question	qa+manager@ecisys.com	May 10, 2023	Jun 19, 2023	published	2	
	😰 hh										

### 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.

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. <u>Contact Settings</u>
- 3. System Generated Questions
- 4. Integration Settings
- 5. <u>Templates</u>

#### Refer to the screenshot below.

T	NTERACTIVE * 9824 ¥					م مه+manager@ecisy•
<b>*</b>	General Contact Settings System Generated Questions	ntegration	Settings Templates			
Ţ	General Settings		Country Settings		Email Domains	
	Include Date Submitted when printing form response to PDF			♠ Import country		×
•	Electronic signature		Belarus	×		×
	Digital signature (Default)		Germany	×	Another	
	M DocuSign		india	×		
•	Application url *	0	Spain	×		
_	User name *	0	UK	×		
-	Password *	0	USA	×		
	Integrator key*	0	Another			

### 8.1 General Tab

The General tab contains the following settings:

- 1. General Settings
- 2. <u>Country Settings</u>
- 3. <u>Email Domains</u>

#### 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

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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.

Electronic signature		
Digital signature (Defai	ult)	
🗹 DocuSign		
Application url *		0
User name *		0
Password *		0
Integrator key *		0

Each of the above fields provides the help question mark  $\ref{eq:above}$  at the end clicking which displays the tooltip as below.

Г

٢,	ACTIVE	eFeasibility v2.6 – Manager User Guide 	Version 1.0 Page 22 of 197
	General Settin	gs	
	🗌 Include Date S	ubmitted when printing form response to PDF	
	Electronic signa	ture	
	🕑 Digital signatu	re (Default)	
	🕑 DocuSign		
	Applicatio	n url * http::// Please enter the application url for your DocuSign account	
	User r	ame *	
	Pass	word *	
	Integrato	r key*	

Below is an example for the DocuSign Settings.

Application url:*	https://appdemo.docusign.com	?
User name:*	a.dihtysar@aimprosoft.com	?
Password:*	•••••	?
Integrator key:*	3433f39c-459a-4748-9be4-1479cfbb6a50	?

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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.

	↑ Import count
Belarus	×
Germany	x
India	2
Spain	2
UK	2
USA	3

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.

	Another	]
Ĩ		

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

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Co	ountry Settings			
		↑ Import country		
E	Belarus	×		
	Germany	×		
	India	×		
4	Spain	×		
l	UK	×		
l	USA	×		
	Another			

### 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.

Country Settings	
	↑ Import country
Belarus	×
Spain	×
UK	×
USA	×
New Zealand; China; India: Germany	
Cancel	

3. The Countries are added to the Country list.

T R INTER		eFeasibility v2.6 – Man	ager User Guide	Version 1.0 Page 25 of 197	
	Country Settings				
		▲Import country			
	Australia	<b>⊌</b> ×			
	Belarus	×			
	China	<b>∞</b> ×			
	Germany	<b>∞</b> ×			
	India	<b>∞</b> ×			
	New Zealand	<mark>⊗</mark> ×			
	Spain	×			
	UK	×			
	USA	×			
	Another				

#### 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.

mail Domains	
trialinteractive.com	×
efeasibility.ecisys.net	×
transperfect.com	🥹 🗙

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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.

C	nteractive * qaza v	Q.	a+manager@ecisy
»	General Contact Settings System Generated Questions Integration Settings Templates		
+	Outon Bild Next o		
	Castellinitian reals Q		
			ZOOX
	ti d		BOO X
-	Domain     S		COOX COOX
<b>¢</b> \$			COO×
m			

#### 8.2.1 Editing Custom Field

- 1. Click the Edit icon ent 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.

General Contact Settings System Generated Questions Integration Settings Templates		
Custom Field Name* Q	Custom Field Type* Date	▼ +Add
B P	5	200×
500 n	È	Ź₀o×
🛗 d	<u>.</u>	300×
🗈 s	G	300x
🛗 Domain	G	200x
	G	800×



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8.2.2 Changing the Sequence of Custom Field

- 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.

T	Interactive * 9824 ¥	Qa+manager@ecisy♥
<b>»</b>	General Contact Settings System Generated Questions Integration Settings Templates	
+	Questions group	Create new Questions Group
B	1 One question	×
•	empty 3 All types - all required	×
*	Test Form New Supplementary Form title	×
<b>o</b> ;	Multiple Choice	×
•	sine reasoning Monitoring Visit Form	
	Rater Questionnaire	

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.

$\mathcal{L}$	NTERACTIVE * 9424 *				Če 💩 qu-mana	gertredsy
>	Group name: Q&A <					12
+	Duestion *	Coatting Base -		Contant restriction:		
	What are clinical trials?	Text Field	*	No liestriction		
•	Answer options				Contact Field Association	
	Clinical trials are research studies done to fin Another	d out if a treatment can improve people's health. A treatment can be a drug, medical de	srice, medical procedure, or a change in a person's beh	havior such as diet or exercise.		~ ×
<b>o</b> ;	<ul> <li>Make required</li> </ul>	Answer choices must be the same				
-		Cancel	Add			
	1 Last Name				Ø1 17 0	0 x
	2. Middle Name				(2) IF O	o ×
	1 Erst Name				917.0	0 ×
			Back			

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

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.

100 I	Relative * aut v	Ō	(▲) qa+manager@ecisy
»	General Contact Settings System Generated Questions Integration Settings Templates		
+	Ouestions eroup		eate new Questions Group
E			
•	empty Add System Generated Questions Group		×
	3 Al types - all required O&A		×
-	New Supplementary Form title Cancel Add		×
<u>~</u>	Multiple Linke Site Feasibility		*
	Monitoring Vict Form Rater Questionnaire		

### 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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Published Form S	learch						
	QSearch	Choose form type	v	Date Created:	to:		
Showing 1D entries out of 8	13						
is integrated	Title	Study Name	Organization	Туре	Created By	Date Created	_i
	monitoring test123			1 One question	qa+manager@ecisys.com	Mar 22, 2022	
	MQ			1 One question	qa+manager@ecisys.com	Jun 21, 2023	
	Test 09			1 One question	qa+manager@ecisys.com	jun 19. 2023	
	23			1 One question	qa+manager@ecisys.com	Mar 24, 2021	
	QA analysts11			Rater Questionnaire	qa+manager@ecisys.com	Jun 20. 2023	
	Type001			Rater Questionnaire	qa+manager@ecisys.com	Jun 19, 2023	
	QA analysts11			Test Form	qa+manager@ecisys.com	Jun 20. 2023	
	Type002			1 One question	qa+manager@ecisys.com	Jun 19, 2023	
	hh			1 One question	qa+manager@ecisys.com	May 10, 2023	
	11			1 One question	qa+manager@ecisys.com	May 12, 2023	
Show 10 ¥			≪ <	12345>>>			o
			Const	Arid Selected			

- 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.

C	INTERACTIVE * 9824 *			Qet qa+manager⊕ecisy			
»	General Contact Settings Sy	tem Generated Questions Integration Settings Templates					
+	+ Select form Selected Form: monitoring test123						
	Enable/Disable origami integration						
•							
	Origam	Domain:* https://www.google.com/search?q=youtube&riz=1C1GCEA_enIN1017IN1017&oq=&aqs=chrome.0.69I59I450I8.2666059J0J7&sourceid=chrome&ie=UTF-8	0				
_	U.	r Login:* testilitransperfect.com	0				
~	User F	ssword?	0				
		Site ID:* 12	0				
		vient ID:* 16	0				
	Тері	Type ID:* 21	0				
	Application	Domain: <sup>1</sup> (est123	0				
		Sove 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.

Metadata Mapping	
Document category: * Investigative Site	Document type: * Principal Investigator Curriculurr 👻
Question	TI field
Last Name	<b>`</b>
Middle Name	~
First Name	~
Email	~
Institution Name	~
Insitution Address 1	~
Insitution Address 2	~
City	~
	Cancel

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.

E		qa24 🖌		<u>õ</u> e	▲ qa+manager@ecisy
»	General Contact Se	ttings System Gen	rrated Questions Integration Settings Templates		
+	Select form Selected Fi	orm: monitoring test123			
	Enable/Disable origam	i integration			
•					
-		Origami Domain:*	https://www.google.com/search?q=youtube&riz=1C1GCEA_eniN1017IN1017&oq=&aqs=chrome.0.69I59I45088.2666059J0J7&sourceid=chrome&ie=UTF-8	0	
-		User Login:*	testilitransperfect.com	0	
•		User Password:*		0	
		Site ID:*	12	0	
		Parent ID:*	16	0	
		Topic Type ID:*	21	0	
		Application Domain:*	test123	0	
			Save settings		

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.
- 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.
- Click the Save Settings button. Proceed to steps <u>13 to 17 in Integration Settings</u> mentioned above to continue the further procedure



### 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

THERACTIVE	🖕 ga24 🗸		ر من معالم معال	*
General Co	ntact Settings System Generated Questions Integration Settings Templates			
Email Templa	tes	Page Templates		
Templa	te Type: Email response for duplicate submissions 👻	Template Type:	'CDA is in progress' page template	
Des	cription: Text that will be used in an email sent to submitter when he/she submits a survey that has already been submitted before.	Description:	Notification page for recipient, that his CDA is in progress	
-	Subject: Duplicate questionnare submission	CDA verification header text:	Verification in progress	
्द्र Normal - ता-	<u>∧</u> в / ц ⊨ ⊨ x, x 强 판 E 조 3 \$ ∞ ф & − ↔ 0			2
Dear Strecipient We have alread allowed per ema Sincerely,	Email, y incrined a submission for §form/This] questionnaire from your email account in the past. Only one submission is all account. If you do not submit any response in the past, please contact <u>prevention submission to com</u>	CDA verification in progress message text:	verification in progress	ļ
Trial Interactive	Team		Cancel Preview Save	
insertions: To a d	use an insertion, place cursor where you would like the insertion to happen, press on the insertion icon O and select stired insertion.			
	Cancel Preview Save			

### 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.

T R I A L INTERACTIVE	eFeasibility v2.6 – Manager User Guide	Version 1.0 Page 34 of 197
General Contact Se Email Templates	ttings System Generated Questions Integration Settings Templates	
Template Type:         Description:         Subject:         Normal       -T A. B         Dear S(recipientEmail),         We have already received allowed per email account Sincerely,         Trial Interactive Team         Insertions:       To use an im: a desired ins	Email response for duplicate submissions Select item for editing Email response for duplicate submissions Default email text for sending surveys CDA recept notification email CDA acceptance notification email CDA template was changed notification email to recipient CDA template was changed notification email to sender Email for user verification while E-Sign Email to signer that Investigator signed CDA Email notification abg default text Form Closed page text Default instructions text for survey forwarding	

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.
τT*	Font Size: Allows you to change the text size.
<u>A</u> *	Font Color: Allows you to change the text color.
В	Allows you to make the text <b>Bold</b> .
Ι	Allows you to make the text <i>Italics</i> .
U	Allows you to make the text <u>Underlined</u> .
	Ordered List: Allows you to insert ordered list.
E	Unordered List: Allows you to insert unordered list.

T R I INTERA		eFeasibility v2.6 – Manager User Guide	Version 1.0 Page 35 of 197				
	x <sub>2</sub>	Subscript: Allows you to insert the subscript.					
_	x <sup>2</sup>	Superscript: Allows you to insert the superscript.					
	Ū	Outdent: Allows you to align text to the Left.					
	Indent: Allows you to align text to the Right.						
_	E	Justify Left: Allows you to align text to the left justified.					
_	Ξ	Justify Center: Allows you to align text to the center.					
	Ξ	Justify Right: Allows you to align text to the right justified.					
_	\$	Strike Through: Allows you to strike the text.					
	GÐ	Add Link: Allows you to insert a link to surveys or other reference	ces in a mail. Refer				
		section Adding a Link in the mail for more details on this.					
	œ	Remove Link: Allows you to remove the link.					
Cleaner Style: Allows you to remove the text forma							
	- Horizontal Rule: Allows you to insert a line below the text.						
	Source: Allows you to view the text in html format.						
_	0	Insertions: Allows you to insert in between text. Insertion of Survey Title: Allows to insert the Survey title. <b>Recipients Email</b> : Allows to insert the Recipients Email.	ontains two types:				

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

Email Templat	tes			
Templat	te Type: Email res	ponse for duplicate submissions	;	
Desc	ription: Text that w submitted	vill be used in an email sent to su before.	bmitter when he/she submits	a survey that has already been
S	Subject: Duplicate	questionnaire submission		
We have already allowed per ema	y received a submiss il account. If you did	ion for \${formTitle} questionnaire f not submit any response in the pa	rom your email account in the pa ist, please contact <u>help@trialinte</u>	ast. Only one submission is rractive.com.
Sincerely, Trial Interactive	Team			
Sincerely, Trial Interactive Insertions: To u a de	Team use an insertion, pla esired insertion.	ice cursor where you would like t	he insertion to happen, press o	on the insertion icon <b>O</b> and sele

### 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.


#### 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.

$\sim$	Т	R		Δ	1
$\mathcal{T}_{\Delta}$	л'n	┯┢╴	sλr	~τ`ι\	
$\cup$	IN			- 11	v 🗆

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Email Templates		
Template Type:	Email response for duplicate submissions	~
Description:	Text that will be used in an email sent to submitter when he/she submits a survey that has already been submitted before.	
Subject:	Duplicate questionnaire submission	
Dear \${recipientEmail}, We have already receive allowed per email accour Sincerely, Trial Interactive Team	d a submission for \$ <u>{formTitle</u> } questionnaire from your email account in the past. Only one submission is t. If you did not submit any response in the past, please contact <u>help@trialinteractive.com</u> .	
Insertions: To use an in a desired ins	sertion, place cursor where you would like the insertion to happen, press on the insertion icon <b>O</b> and sele sertion.	c
	Cancel Preview Save	

#### 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.

	eFeasibility v2.6 – Manager User Guide	Version 1.0 Page 39 of 197
Page Templates		
Template T	ype: 'CDA is in progress' page template	~
Descrip	tion: Notification page for recipient, that his CDA is in progress	
CDA verification hea t	Verification in progress ader sext:	<i>h</i>
CDA verificatio progress message f	Verification in progress in in lext:	li
	Cancel Preview Save	

## 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.

T	NTERACTIVE	🜟 qa24 🖌			Qe+manager@ecisy↓
<b>*</b>	Question Cate	gories	+ Add	Form Types	+ Add
Ţ		Category Name		Form Types	
ø		cat1	3 ×	1 One question	3 ×
		cat2	S ×	3 All types - all required	<i>⊗</i> ×
		ererer	3 ×	empty	<i></i>
-		New category	3 ×	Monitoring Visit Form	
-		Testdemo	2 ×	Multiple Choice	2 ×
~				New Supplementary Form title	
~				Q&A	
_				Rater Questionnaire	
				Site Feasibility	
				Test Form	2 ×

## 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.



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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.

T R INTER	ACTIVE	eFeasibility v2.6 – Manager User Guide		Version 1.0 Page 41 of 197
	Question Categorie	s +	Add	
	Ca	ategory Name		
	E ca	t1 🖉	×	
	ca	t2 🖉	×	
	er er	erer 🛛	×	
	N	ew category 📝	×	
	Te Te	istdemo 🧭	×	
	De	emo	×	

- 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.
- Click the 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.

Form Types		+ Add
Form Types		
1 One question		I 🖉 🗙
3 All types - all required	Add Form Type	<b>e</b> ×
empty		<b>B</b> ×
Monitoring Visit Form	Supplementary Forms	
Multiple Choice		I 🖉 🗙
New Supplementary Form title		I 🖉 🗙
Q&A	Cancel	<b>B</b> X
Rater Questionnaire		
Site Feasibility		
Test Form		<b>X</b>

4. Follow the same procedure as discussed in <u>Steps 8 -10 in section Question Category</u> to update and delete the Form Type.

	eFeasibility v2.6 – Manager User Guide	Version 1.0 Page 42 of 197
Form Types	+ Add	
Form Types		
1 One question	I 🗴	
3 All types - all required	<i>⊠</i> ×	
empty	<i>⊠</i> ×	
Monitoring Visit Form		
Multiple Choice	<i>⊠</i> ×	
New Supplementary Form	title 🖉 🗙	
Q&A	♂ ×	
Rater Questionnaire		
Site Feasibility		
Supplementary Forms	♂ ×	
Test Form	✓ ×	

## 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. <u>Groups</u>
- 2. <u>Contacts</u>
- 3. Contact Details

	\star qa24 🐱		() qa+manager⊜ecisy
Groups	+ Add B Delete	▲ Contacts +Add + Import T Filters III Contact Details	🕼 Edit 🔹 Delete
All Contacts		Smith, John	
8'		Newton, Isaac	
New List		1172-ed, ff72-ed	
		Gutenberg, Johannes	
		Phone:	
1		Organization:	
		Role:	
		admi10t10@gmail.com investigation types: 3All types - all required empty	1 One question
		Groups:	
		NewContact7@new.new	
		NewContact+8@new.new	
		NewContact+9@new.new comparted surveys	
		1110111.111	
		COA	
		CONTRACTOR OF CONT	
		and the second se	
		to the second seco	
		and the second se	
		and the second se	
		and an and a second	
		and the second se	
		100000000000000000000000000000000000000	
		and the second se	
		the second se	

### 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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🚰 Groups	+ Add 🛍 Delete	
All Contacts		
gr		
New List	_	
Tech Docs	C .	

### 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.

🖀 Groups	+Add 🕆 Delete	La Contacts
All Contacts		Smith, John
gr		Newton, Isaac
New List		III72-ed, fff72-ed
		Gutenberg, Johannes
		qa2+82@ecisys.com
Group Name:		
Create Additional Configura	ation :	
email	✓ Search contacts	Add
email firstName lastName role	Cancel	
phone		111@111.111
investigation types		qa2+77@ecisys.com

- 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.
- 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.

皆 Group	)S	<b>∔</b> Add	🛍 Delete
All Contact	s		
gr			
New List			ľ
Tech Docs			
			<b>*</b>
Delete	Group		
1 Are you	i sure you want	to delete the	group?
	Cancel	Delete	

#### 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.

T R I A L INTERACTIVE	eFeasibility v2.6 – Manager User Guide	Version 1.0 Page 45 of 197
▲ Contacts Build Head System Create New Contact First name: Last name: Create Sea Create New Contact First name: Last name: Create New Contact First name: Last name: Create New Contact First name: Last name: Create New Contact Pirst name: Role: Create New Contact Pirst name: Role: Composition Composition Composition Contact Pirst name: Composition Contact Pirst New Contact Pirst New Contact P	*****       ContactD         Anh	
Contacts Smith, John Newton, Isaac II72-ed, ff/72-ed J, Ash Gutenberg, Joha Import Con	+ Add ↑ Import ▼ Filters	

5. The Cancel and Continue buttons - The Continue button is deactivated by default and is activated only when the source file is imported.

4. The Create New Group with imported contacts? checkbox allows you to create new group and import

Continue

3. The Search box with a magnifying icon to import the source file from the system.

Please, print new group name for importing contacts

Cancel

Create new group with imported contacts?

contacts simultaneously in the group.

New group Name

Q Search



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Q Search

- Click the magnifying glass (Search button)
   I 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

🛓 Contacts		+	Add	<b>↑</b> Import	▼ Filters
Smith, John					
Newton, Isaac					
III72-ed, fff72-ed					
J, Ash					
Field Association					
In eFeasibility		In File			
Last name					· ^
First name				•	•
Email *		efeasibilty		`	
Phone					
Organization				`	•
Role				`	•
Ρ					•
	Back	Import	]		

 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.



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.

La Contacts	+ Add	<b>↑</b> Import	▼ Filters
Smith, John			
Newton, Isaac			
lll72-ed, fff72-ed			
J, Ash			
Import Contacts			
Please, select import source file in CSV format			
efeasibility.csv			Q Search
Please, print new group name for importing contacts	;		
DocTWS			
✓ Create new group with imported contacts?			
Cancel	nue		

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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 <u>Import Contacts</u>.
- 3. The Group and Contacts are added to the list.

🖀 Groups	+ Add	🛍 Delete	Le Contacts	+ Add	<b>↑</b> Import	<b>T</b> Filters
All Contacts			D, Amra			
DocTWS		Ø				
gr						
New List						
Tech Docs						

#### 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.

醬 Groups	+ Add	🛍 Delete	Le Contacts		+ Add	🛧 Import 📘	Filters
All Contacts			firstName	✓ Amra		×Q	Search
DocTWS		Ø	firstName: Amra 🗶				
gr							
New List			D, Amra				
Tech Docs							

#### 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.

	É	Feasibility v2.6 -	- Manager	User Guide	Version 1.0 Page 49 of 197	
a. <b>P</b>	review: Click th	e <b>Preview</b> icon t	o open the forn	n in a new tab.		
b. <b>D</b>	<b>ownload:</b> Click	the <b>Download</b> ic	on to download	a PDF of the form.		
Click the Down screenshot). Th icon to collaps	h Arrow icon is his arrow icon is e the section. Re	on to the right of every s converted to horizoni efer to the below scree	r section header tal line aft nshot.	to expand it (Refer er expanding the se	to the above ction. Click the	
El Contact	Details		G	🛿 Edit 🛛 🛍 Delete		
	First name:	Johannes				
	Last name:	Gutenberg				
	Email:	qa2+3@ecisys.com				
	Phone:					
	Organization:					
	Role:					
	Investigation types:	3 All types - all required New type	1 One question			
	Groups:					
Additional I	nformation			<b>~</b>		
Completed	Surveys			-		
Title		Date Completed	View [	Download		
PDF_Testing	_23_06	Jun 23, 2020	۲	*		
Form with D	ocuSign	Jun 26, 2020	۲	*		
23		Mar 26, 2021	۲	2.		
CDA				~		

#### 10.3.1 Editing Contact

#### To edit the Contact:

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

	Edit Contact
EI Contact Details	Edit 🛍 Delete
	0

- 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.



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

E Contact Details	C Cancel	🛍 Delete
First Name:	Amra	
Last name:	D	
Email:	Olivethedog@fakeemail.com	
Phone:		
Organization:		
Role:		
Investigation types:	3 All types - all required New type 1 One question	
Groups:	Select Groups	
P:		
n:	21	
d:	06/22/2023	
S:		
Domain:	06/29/2023	
J:	23	
	Cancel	

#### 10.3.2 Deleting Contact

You can delete contact in the following ways:

- 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.



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



Through the Delete U 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.

🖽 Contact Details		☞ Edit 👘 Delete
First name:	Ash	
Last name:		
Email:	ashj@fakemail.c	iom 🖌
Phone:		Delete Contact
Organization:	TWS	
Role:		Are you sure you want to delete the contact? It     will be deleted from the system!
Investigation types:		
Groups:	Tech Docs	Cancel Delete
Additional Information		¥

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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.

»	Create new form	
+		
•	Cre	Pate From Existing Form
-	Title*	
	Type* Choo	vse type 👻
¢8	Study	
	Organization	
	Instructions	
		4
		Continue

#### 11.1 Creating Form

To create a new Form:

1. Open a required project.



3. Enter the fields and click Continue.

T R I A L INTERACTIVE	eFeasibility v2.6 – Manager User Guide	Version 1.0 Page 53 of 197
Create new form	2 V	G. Determination of the second s

Note: You can also create a new form from the existing list of forms by clicking Create from Existing Form

checkbox. Proceed to <u>Cloning a Form</u> for further details.

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

- <u>Changing Logo</u>
- Add Questions
- Add Sections
- <u>Close</u>
- <u>Actions</u>
- <u>Publish</u>
- Editing Instructions

T R I /		eFeasibility v2.6 – Manager User Guide	V P	'ersion 1.0 age 54 of 197	
	R I A L QAmanual25 V			Ç	
+		test form	1 - one question	3	
۵.	nstructions			D QUEST	
•	Select / Deselect All			Y YD	
*	General			@ @ <b>0 0 x</b> 0	
00	1. First question - Text Field			40 x	
				-	
	•				
		Close Actions A Publish			

## 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.

6	NTERACTIVE * 9824 *		Ö® (	a)qa+manager@ecisyv
* +		Test123	1 One question	ZOL
۲	Instructions			
٠	Select / Deselect All			
*	General		<b>4</b> 3 G	• • • × • 6
o;	1. FIRST QUESTION		අඩු G	800×
⊞				
	2. FIRST QUESTION		ඇ ය	200×
		Here Articus & Dublish		*
		Poster Poster		



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

💿 Open						$\times$
$\leftarrow \rightarrow \vee \uparrow$ 🕹 > This	PC > Downloads >		~	O P S	earch Downloads	
Organize • New folder					E • 0	0
📕 Articulate 👒 🔿	Name	Date modified	Type	Size		^
ABBYY 🖈	Contraction of the local division of the	2/13/2023 5:39 PM	Microsoft Word D.,	363 KB		
Alicrosoft 🖈 🚽	a second second second	2/7/2023 11:25 AM	zip Archive	32 KB		
outlook loggi 🖈	No. of Concession, Name and Name	2/6/2023 5:52 PM	Microsoft Excel W	12 KB		
efeasibility	and the second second second second second	2/6/2023 12:10 PM	Microsoft Excel W	14 KB		
Global Learn	Company of the second second	2/1/2023 6:24 PM	Microsoft Word D	1,017 KB		
Imperer (222	and some first in some	1/27/2023 10:03 AM	zip Archive	772 KB		- 14
images v2.5.2		1/27/2023 10:03 AM	Text Document	1 KB		
Images v2/6	and the second second second	1/27/2023 10:03 AM	Microsoft Excel Co	1 KB		
<ul> <li>OneDrive - Person</li> </ul>		1/24/2023 2:38 PM	Microsoft Word D.,	10,505 KB		
b to use	<ul> <li>undefined</li> </ul>	1/24/2023 1:15 PM	PNG File	40 KB		
S Insec	Concession in the second	1/24/2023 1:06 PM	Microsoft Excel W	9 KB		
3D Objects	Contraction and the second	1/24/2023 11:00 AM	Microsoft Word D	456 KB		
Desktop		1/17/2023 8:20 PM	zip Archive	193 KB		
Documents	and some second and the second	1/16/2023 6:10 PM	Microsoft Excel W	12 KB		
🐥 Downloads 🗸 🗸	Contraction of the later of	1/12/2023 6:43 PM	zip Archive	28 KB		~
File game	s undefined			~ All File	5	~
				•	pen Cancel	

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.

	Question From Library
	Create Question:
QUE	Question: *
ADD	Question text
	Question Type:
	Text Field
	Content Restriction:
	No Restriction
	Answer options
	×
	Another
	Category
	Make Required
	Hidden Question
	Answer choices must be the same
	+ Library Add

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.
- 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.

Create Question:
Question: *
Question text
Please enter a valid question.
Question Type:
Text Field
Comments Field
Date Field
Multiple Choice-Checkbox
Multiple Choice-Dropdown
Multiple Choice-Single Selection
Multiple Choice-Single Dropdown
Matrix of Radio Buttons
Acknowledge Field
Text Field
Country Field

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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 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

Create Question:	
Question: *	
Question text	
Please enter a valid question. Question Type:	
Text Field	~
Content Restriction:	
No Restriction	T.
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 <u>Content</u> <u>Restriction</u>.

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 <u>Hidden Question</u> 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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Category	/			
Make Re	quired			
🗌 Hidden G	Make Required Hidden Question			
Answer of	hoices must be the same			

- 4. Setup last sub-question as text answer: This allows you to provide the last answer option as a text field.
- 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 <u>Reports.</u> 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 <u>Hidden</u> <u>Question</u> 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.

	+ Question Fro	m Library		
STION	Create Question:			
<b>D</b>	Question: *			
ADC	Question text			
	Question Type:			
	Text Field			۷
	Content Restriction:			
	Alpha			~
	Answer options	Min Length	Max Length	
		7	10	×
	Another			
	Category			
	Make Required			
	Hidden Question			
	Answer choices must be the same			
	+ Library	Add		

#### **Content Restriction – Email**

This allows the submitter to enter only valid email id.

ŧ		
	Create Question:	
	Question: *	
	Question text	
	Question Tune:	
	Test Field	
	Text Held	,
	Email	
	Childh	
	Answer options	
		×
	Another	
	Contractor	
	Make Required	
	Hidden Question	
	Answer choices must be the same	



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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.

Question From Library	
Create Question:	
Question: *	
Question text	4
Question Type:	
Text Field	~
Content Restriction:	
Phone With Extension	~
Answer options	
	×
Another	
Category	
Make Required	
Hidden Question	
Answer choices must be the same	
+Library Add	

#### **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.

A Sections >>	The Interactive	Test demo01	Share	Download	Saved	Decline
CDA Sign 🗸	INSTRUCTIONS					~
Separing Doumention	Fill all accounts 1. Clinical for a ser crucial for new or the clinical ser crucial for new or the clinical for the clinical for the Phase series and the clinical triable Phase series a valid series. 2. What is phase 4 in clinical triable Phase series a valid series of the triable does dream and address. The does dream for a dise effects and chinafter for and.	nadicines to bring is market?	s than 3 and no more than	10 character	rs	
	A. What happens in phase 2 of clinic determine the effectiveness of an expen- danser or motion in approximately 10 insuald number format.     A. Tell the number of phases in clinic S: <u>nol</u> Please enter a valid numeric value gro	La statute mend diagon a parkalar and a spankalar to a statute teat statute mater or requirt to 16, using did 1, for any decrut	Ditension:			
		0% Net	xt			

### 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.

<b>\$</b>	+ Question From Library						
Create Question:							
Question: *	Question: *						
Does CT start in pha	ise 1?	1					
Question Type:							
Multiple Choice-Sin	gle Selection	ĮK.					
		Ŭ					
Multiple Choice-Ch Multiple Choice-Dro	eckbox opdown						
Multiple Choice-Sin Matrix of Radio But	gle Dropdown tons						
Make Required							
Hidden Question							
Setup last sub-qu	uestion as text answer						
	16						
	+ Library Add						

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

T R I A L INTERACTIVE	eFeasibi	lity v2.6 – Manager User Guide	Version 1.0 Page 71 of 197
	From Library Behavior Is defa  R  N  S  S  A  A  A  A  A  A  A  A  A  A  A	→ ut ×	Page 71 of 197
+ Library	Add		

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

79. what is CT?	දා ල <b>o o x</b>
First	
Second	
Prist & Second	
80. Does CT start in phase 1?	ද්) 🗷 🕒 🔍 🗙
• Yes	
O No	
	Close Actions A

- 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.

T R I A L INTERACTIVE		eFeasibility v2.6 – Manager User Guide			Version 1.0 Page 72 of 197
	Sections     Sectors     Sectors	In the Active  C clinical trials are conducted revelated?  Trial  C clinical trials are scales  Trial  C clinical trials  Trial  C clinical trial  Trial  C clinical trial  Trial  C clinical trial  Trial  C clinical  C	Test798	Dure Develued Lovel Decline	
	L Section 2 Con- Control Con- Con- Con- Con- Con- Con- Con- Con-	Tyre Add stacherer 1	Text798	Share Deventiant Savud Decline	
ACTIVĒ	eFeasibility v2.6 – Manager User	r Guide	Page 73 of 197		
--	--	----------	----------------		
TINTERACTIVE	Test798	Download			
INSTRUCTIONS		× *			
Conduct Clinical Trial part 2					
	This is a Confirmation Page Please confirm that all information below is correct.				
1. Clinical Trials are conducted on gui	nea pigs in phase1?				
Yes: Yes					
No:					
Maybe:					
2. Are clinical trials safe to conduct o	i humans?				
	to the transfer				
Yes					
No Mayhe					
Not Sure					
3. Protocol ID					
	Back to Suprey				
78. Clinical Trials are safe?					
78. Clinical Trials are safe?					
78. Clinical Trials are safe?					
78. Clinical Trials are safe?	ş				
78. Clinical Triais are safe?	ş				
78. Clinical Trials are safe? Yes	\$				
78. Clinical Trials are safe?	ş				
78. Clinical Trials are safe? Yes No Maybe	\$				
78. Clinical Trials are safe? Yes No Maybe 79. Does CT start in phase 1?	ş				
78. Clinical Trials are safe? Yes No Maybe 79. Does CT start in phase 1? Yes	\$				
78. Clinical Trials are safe? Yes No Maybe 79. Does CT start in phase 1? Yes © No	\$				
Yes       No       Maybe       79. Does CT start in phase 1?       Yes       No       20 No       80. what is CT?	\$				
Yes         No         Maybe         79. Does CT start in phase 1?         Yes         No         Wes         No         B0. what is CT?         Prist	\$				
Yes         No         Maybe         9         0         Maybe         9         No         10         Maybe         10         Ves         10         No         11         Yes         10         No         80. what is CT?         Yest         Second	\$				
Yes         No         Maybe         79. Does CT start in phase 1?         Yes         No         80. what is CT?         Yest         Second         Yest & Second	\$				
Yes         No         Maybe         79. Does CT start in phase 1?         Yes         No         80. what is CT?         Yrst         Second					
Yes         No         Maybe         79. Dees CT start in phase 1?         Yes         No         9. No         80. what is CT?         Yes         Second         Prist & Second         11_UserGuides-Template.doc:441 K8					

T R I A L INTERACTIVE	y v2.6 – Manager User Guide	Version 1.0 Page 74 of 197
Test Thank You for complet If you have any questions about please visit us at w or e-mail us at hel	st798 eting the questionnair the questionnaire or Trial Interactive ww.trialinteractive.com p@trialinteractive.com	e!
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.

T R I ALL	Test12345 1	One question
This form is important.		

# 

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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.

C	NTERACTIVE 1 Q824 V			Co testingstage@test.cv
*		Test798	Clinical Trial	Add Section:
*			Monitoring Visit Form	Title*:
	Conduct Clinical Trial part 2		nory norphal	Tech Docs
-	Compare entropy in the part of			Description (optional):
:	1. Protocol ID		42 ° 0 0 × 1	Normai · 귀· <u>신</u> · B / 빌 듣 듣 x <sub>2</sub> 와 결 톤 톤 포 결 9 ce qé & ─ ◆ O
- %			U Se	This is an important section
•	2. Indication		43 € 6 0 ×	
	3. Investigator Product		4 2 0 0 ×	
	4. Visit Date		4) C O O X	
		-		
	5. Previous Visit Date		43 <b>≥ ⊙ ⊙ ×</b>	
		Close Actions A Publish		Add Section

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.

## 11.6 Adding Questions to Form from Library

To Add Questions to Form from Library:

- 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.

+ Question From Library

)uestion	Search					
			Q Search		Choose Question type	Choose category 👻
Showing 10 e	Question Title	Category	Tags	Question Type	Date Created	Description
+	19			Text Field	Apr 8, 2021	
+	20			Text Field	Apr 8, 2021	
+	21			Text Field	Apr 8, 2021	
~	To library			Text Field	Apr 24, 2020	
~	What is Clinical Trial?			Text Field		Clinical trials are a type of research that studies new tests and treatments and evaluates their effects on human health outcomes
Show	10 🗸			≪ < 1	23>>	c
				Cancel	Add Selected	

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

		Q	Search	Choose Question type	Choose category     V	
owing 10 entr	ies out of 25 Question Title	Category	Tags	Question Type	Demo E ererer Sescri	ation
+	To library			Text Field	Ji Testdemo	
~	To library			Comments Field	Jun 26, 2020	
+	1			Text Field	Apr 8, 2021	
+	12			Text Field	Apr 8, 2021	
+	13			Text Field	Apr 8, 2021	
~				Text Field	Apr 8, 2021	
<b>~</b>				Text Field	Apr 8. 2021	
+	16			Text Field	Apr 8, 2021	
+	7			Text Field	Apr 8, 2021	
+	18			Text Field	Apr 8, 2021	
show 10	•			≪ < 1 2 3 > ≫		c

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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.

C	T R I A L internalTest	Select the Project
*	Create new form	
•	C	Create From Existing Form
*	Search existing form	Q Search
œ	Туре*	Choose type
▦	Study	
	Organization	
	Instructions	
		Continue

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.

	Q Search	Choose form type	Date Created:		to:		
Showing 10 entries out of 115 Actions 🗸							
View	Title	Study Name	Organization	Туре	Date Created	Comments	Dele
۲	PDF_Generation			Chris Testing	Jul 8, 2021		×
0	test			Site Feasibility	Feb 1, 2021		×
۲	For Countersigning CDA			Site Feasibility	Jan 17, 2019		×
۲	TI Pride Survey q1 2018	Strategy		Chris Testing	Feb 11, 2018	Q1 2018 - one question survey!	×
۲	Testing Every question type required in Firefox			Tenzing's Type	Jan 18, 2018		×
۲	Internal Survey			Client Satisfaction	Nov 17, 2017		×
۲	Training for SEs			SE Training	Oct 26, 2017		×
۲	FormAutoTest16104755780306964	FormAutoTestStudy1730505193935	FormAutoTestOrg81477764281478	Dermatology	Apr 27, 2016		×
۲	FormAutoTest58713149625043015	FormAutoTestStudy5739914314778	FormAutoTestOrg62570554256057	Oncology Phase 1	Apr 27, 2016		×
۲	FormAutoTest48668424671983237	FormAutoTestStudy5317520764748	FormAutoTestOrg77019117416935	Oncology Phase 3	Apr 27, 2016		×
how	10 🗸		<b>≪ &lt;</b> 1 2 3 4 5 <b>&gt; ≫</b>				Ð

- 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.

Create new form	
	Create From Existing Form
Search existing form	test Q Search
Title*	
Type*	Site Feasibility
Study	
Organization	
Instructions	
	h
	Continue

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	Sites Demo 1	Site Feasibility
Instructions		
Select / Deselect All		
General		42 ♂ ⊖ ⊙ ×
1. Last Name		산] ⓒ O O ×
2. Middle Name		ℓ3 8 <b>© ⊙ ×</b>
3. First Name		එ <b>උ ර ර x</b>
4 Email		ℓ2 I C O O ×
	Close Actions Publish	

## 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.

	Sites Demo 1	Cita Equilibility
		and residency
Instructions		
Select / Deselect All		
General		산 C O S D
1. Last Name	N Question Edit	
	Question: *	
	What is Phase 5 in clinical triats?	
	Question type:	
2. Middle Name	Text Field ¥	(2) ≥ ⊙ ⊙ ×
	Content restriction:	
	No Restriction	
	Answer options	
3. First Name	Phase 5 Clinical Trials are commonly referred to as "post-marketing clinical trials".	2 C O O X
	Another	
	Category	
	Make required	
4. Email	Hidden question	心 C O O X
	Answer choices must be the same	
	Cancel Library Update	
	Close Actions A Publish	

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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.

TRIAL	Sites Demo 1	Site Feasibility	
Select / Deselect All			
General			
Tech Docs	Section edit		
1. Middle Name	Title*: Techs Doc		42 <b>≈ ⊖ ⊙ ×</b>
	Description (optional): Normal · 귀·쇼·B / 및 i II II xg 차 램 환 환 표 램 S co qio 소 - 수 O		
2. First Name			£] <b>₽ ⊖ ⊙ ×</b>
3. What is Phase 5 in clinical trials?  Phase 5 Cinical Trials are commonly referred to as 3 post- materiater desired trials?			42 C O O X
4. Email	Cancel Update		€ 8 0 0 ×
	Close Actions A Publish		

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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.

_	+ Question From Library	
STION	Create Question:	
) QUE	Question: *	
ADD	Is it safe to conduct clinical trials on humans?	1
	Question Type:	
	Text Field	~
	Content Restriction:	
	No Restriction	*
	Answer options	
	cipants experience complications that require medical attention	×
	Another	
	Category	
	Make Required	
	Answer choices must be the same	
	+ Library Add	

- 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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TRIAL	Sites Demo 1	Site Feasibility		
Instructions				
Select / Deselect All				
General		ආ ⊘ (	0 0	×
Tech Docs		4 C (	0 0	×
1. Is it safe to conduct clinical trials on humans? Hidden     Clinical trials do come with some ricks. Most clinical trials pose the     risk of minor discomfort, which often lasts only a short time.     However, now study participants experience complications that     require medical attention.		ළු ල (	ଚତ	×
2. Is clinical trial required on animals? Hidden  FDA no longer requires all drugs to be tested on animals before human trials in a victory for animal rights advocates. drug makers can lake ther products to huma clinical trials using atternative testing methods that don't involve animals.		දා ල (	9 0	) x
3. What is Phase 5 in clinical trials?  Phase 5 Clinical Trials are commonly referred to as 'post-marketing clinical trials':		£1 7 (	ଚତ	×
	Close Actions A Publish			



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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.

- 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.

🖏 Question Edit	
Question: *	
Is it safe to conduct clinical trials on humans?	
Question type:	
Text Field	
Content restriction:	
No Restriction	,
Answer options	
Clinical trials do come with some risks. Most clinical trials pose the risk of minor discomfort, which c	;
Another	
Category	
Make required	
Hidden question	
Answer choices must be the same	
Cancel Library Update	

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.

- Click Edit con 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.

T R I A I INTERACTIVE	eFeasibility v2	.6 – Ma	nage	er Us	ser Guide	Version 1.0 Page 84 of 197	
sy Question E	dit						
Question: *							
Is it safe to conduc	t clinical trials on animals?						
Question type:				h			
Multiple Choice-S	ingle Dropdown			~			
Answer options		Behavior	Is default				
I Yes		×		×			
I No		×		×			
: Maybe		×		×			
Another							
Category Make required							
<ul> <li>Hidden question</li> <li>Include in rank</li> </ul>	n						
	Cancel Library Update						
	anana ushich dianlasa ta f-U	ing			-		

- 1. **Position**: The position of the question.
- Questions: Available questions in the Form.
- 3. Visibility: The options Visible and Hidden to change make the question hidden.

Sy Question E	dit	
Position	Questions	Visibility
2	FIRST QUESTION	Hidden
3	FIRST QUESTION	Visible
4		Inactive
5	11	Inactive
	Apply	ancel

- 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.

Sy Question Edit				•	
Question: *					
Is it safe to conduct clinical trials on animals?					
Ouestion type:			h		
Multiple Choice-Single Dropdown			~		
A	Debasias	in defead			
I Yee	Benavior		*		
i No					
I Marta			2		
* Maybe					
Another					
Category					

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.

Z J IN	F Te	RACTIVE	eFeasibility v	/2.6 – Manager User Guide	Version 1.0 Page 86 of 197
	ADD QUESTION	Puestic     Create Question:     Question text     Question Type:     Comments Field     Date Field     Date Field     Multiple Choice-Checkbox     Multiple Choice-Single Selection     Multiple Choice-Single Selection	n From Library		
		+ Library	Add		

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 (\*).



buttons displayed on the 4. (Optional) Click the Add Row screen to add rows and columns. By default, 3 rows and 3 columns are displayed. Refer to the screenshot below.

Answer options:					
Rows: 3 Columns: 3 Reset Create					
		column	column	column	-+
answer row	-				Add O
answer row	-				sumn
answer row	-				
♣ Add Row					

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.

Position	Questions	Visibility
1	Indication	Hidden
2	Protocol ID	Visible
3	Investigator Product	Inactive
4	Visit Date	Inactive
5	Previous Visit Date	Inactive
6	Visit Purpose	Inactive
7	Reason for Other	Inactive
8	PI Last Name	Inactive
9	PI Middle Name	Inactive
10	PI First Name	Inactive
11	Site Name	Inactive
12	Site Address 1	Inactive
13	Address 2	Inactive
14	City	Inactive
A.F.	Charles (Dans James	

- 7. Select the visibility of the question by clicking the **Invisible** button. Refer to the above screenshot.
- 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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ITTERACTIVE					Test798		Clinical Trial Monitoring Visit Form Holy Hospital	
onduct Clinical Trial part 2								
1. Clinical Trials are co	nducted on guine	ea pigs in phas	e17					4 C O O
Vec								
No:								
Maybe:								
The strate strate set in the set	e to conduct on I	humans?						
2. Are concerned on an		10	10 44	to ware				
Yes			40 44	en parane				
Yes No	•	*	60 U	0 0				
Yes No Maybe	· · ·	¢ 0	10 0	6 <sup>66</sup> 10 <sup>66</sup>				

 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.

	Sites Demo 1	Site Feasibility
Instructions		
Select / Deselect All		
General		€1 @ © ♥ ¥
Tech Docs		€1 @ O O ×
1. Is it safe to conduct clinical trials on humans?		4: C O O ×
Clinical trials do come with some risks. Most clinical trials pose the risk of minor disconfort, which often lasts only a short time. However, some study participants experience complications that require medical attention:		
2. Is clinical trial required on animals? Hidden		42 C O O X
FDA no longer negulies all drugs to be tested on animals before hours at the In a victory for simal rights advances, drug makers han take their products to human clinical trials using alternative testing methods that don't involve animals.		
3. What is Phase 5 in clinical trials?		42 @ 🛛 💙 🗙
Phase 5 Clinical Trials are commonly referred to as 'post-marketing clinical trials'.:	Preview Ø Test Email Ø	
	Contact Configuration 🛛	-
	Close Actions A Publish	

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

- Previewing Forms
- Test Email
- <u>Contact Configuration</u>

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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.

ACTIVE	Sites Demo 1	Save as PDF
General		
Tech Docs		
1. Is it safe to conduct clinical trials on humans?		
Clinical trials do come with some risks. Most clinical trials pose the risk of mixed abcomfet, which often lasts only a short time. However, some study participants experience complications that require medical attention.:		
2. Is clinical trial required on animals? FDA no longer requires all dugs to be tested on animals before human trials in a vistory for animal right advocates, or dug makers can sile the temportant to human chronic trials using alternative testing methods that don't involve animals:		
3. What is Phase 5 in clinical trials? Phase 5 Clinical Trials are commonly referred to as 'post-marketing clinical trials':		

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 <u>Templates</u>.

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 <u>Send Survey</u>.

		All test related items will expire in 24 hours.
Recipients:	Insert Recipients 🗸	Email Configuration
zaheer.vousef@wales.nhs.uk	Import contact Existing contacts	From (email address):
idar@transperfect.com	×	sneh e transperfect.com v
mka #@transperfect.com	×	New e-Feasibility questionnaire request
Another		Email Text:
		Normal · if· <u>A</u> ·B/U∏EEEEEEEEEEEEEEEEEEEEEEEEEEEEEEEEEEEE
		This is a TEST if you are not super boay, can you thi out some answers and subant? How is a full to the successment. This is a superly feel to the questionnaire and you can all address. Reare do not forward the message. If you have any questions mode the questionnaire of Tauli Intercable please well and <u>investigation to the original superly and pleases</u> . Tauls you to your partopolation Taules you to your partopolation The instructions. The use insertion place cursor where you would like the insertion to happen, press on the insertion for <b>Q</b> and select a desired insertion. Do you want to get notified when form responses are received? So by you want to be placed from confirmation page?
		Cancel Add attachment Send

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 <u>Custom Contact Fields</u>. When a form is sent to the submitter, these mapped contact fields are prepopulated 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:

 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.

Preview	0
Test Email	0
Contact Config	uration 😧
Close	Actions 木

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

Contact configuration										
Question	Contact field									
Is it safe to conduct clinical trials on humans?										
Clinical trials do come with some risks. Most clinical trials pose the risk of minor discomfort, which often lasts apply a chart time. However, some study.	Role 🗸									
participants experience complications that require medical attention.										
Is clinical trial required on animals?										
FDA no longer requires all drugs to be tested on animals before human trials in a victory for animal rights advocates, drug makers can take their products to human clinical trials using alternative testing methods that don't involve animals.	Role 🗸									
What is Phase 5 in clinical trials?										
Phase 5 Clinical Trials are commonly referred to as 'post-marketing clinical trials'.	Organization 🗸									
Middle Name	~									
First Name	~									
Cancel	Save									

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.

<b>CITRIAL</b>	emas study	ens study Site Feasihility
instructions		U
Select / Deselect All		
General		
1. Last Name	Publish Form?	A COOX
	O Once you Publish the form, it cannot be edited further. Please confirm that you would like to publish the form.	
	Form type:	
2. Middle Name	Simple form.     Simple form.     Monitoring Visit form.     Recarring form.     Recarring form.     Anonymous form.	4 2 0 0 ×
	Additional options:	
3. first Name	Save form to the larary.  Require attachments from recipients.  Cancel  Publish	4 € 0 0 ×
4. Email		
	Glose Attom Attom	

• 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.

	Sites Demo 1	
		site Feasibility
Instructions		J
1. Is it safe to conduct clinical trials on humans?	Publish Form?	2: C O O X
Clinical trials do come with some risks. Most clinical trials pose the risk of minor disconflort, which often lasts only a short time. However, some study participants experience complications that require medical attention.:	O once you Publish the form, it cannot be edited further. Please confirm that you would like to publish the form.	
2: Is clinical trial required on animals?	Form type: Simple form. Supplementary form.	선 C O O X
FDA no longer requires all drugs to be tested on animals before human trais in a victory for animal rights adocated, drug makers can take their products to human clinical trais using alternative testing micholis that don't moleval animals:	Monitoring Visit form. Recurring form. Anonymous form.	
3. What is Phase 5 in clinical trials?	Additional options:  Save form to the library.  Require attachments from recipients.	¢] ∅ 0 0 ×
Phase 5 Clinical Trials are commonly referred to as 'post-marketing clinical trials':	Cancel Publish	
4. Milddle Name		⊗ œ <b>о о ×</b>
	Close Actions A Puttinh	A 17 A A 4

### 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.

TRIAL	Sites Demo 1	Site Feasibility
Instructions		ļ
1. Is it safe to conduct clinical trials on humans?	Publish Form?	ℓ)
Clinical has do correl which define table, west chird a sub-pose the reak of more discontrol, which define have you's a that trans- However, and the sub-poset approximation complications that require medical attention.	Crice you Publish the form, it cannot be edited hurther. Please confirm that you would like to publish the form.     Form type:     One is form	
2. Is clinical trial required on animals?      ROA to longer requires all drugs to be tested on animals?      ROA to longer requires all drugs to be tested on animals before     humon trials and antidoxy for animal rights advocates, drug makers     can be made official trials using alternative     testing methods to doot in choice animal.	Sample torn.     Sapple torn.     Monitoring visit form.     Recurring form.     Anarymous form.	දා ල <b>c c x</b>
3. What is Phase 5 in clinical trials? Phase 5 Circle1 Trials are commonly referred to as 'post-marketing clinical trials':	Australia guine: See from the library: Require attachments from recoverts: Cancel Index h	신 I O O X
4. Middle Name		Ø Ø <b>0 0 ×</b>
	Close Actions A FRANCIS	ACARE

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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 commentation 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.

_	Forms Monitoring Visit Report	rts Recurring Reports					
Active	Outstanding Forms						Q Search T
<ul> <li>Completed</li> </ul>							
	Device Leasting and all						
	Title	Study Name	Organization	Туре	Due Date	Status	Attachments
	QA analysts11			Test Form		Not Started	0
	Show 10 -						c
	Recent Activity						
	Showing 10 entries out of 13						
	Activity Date	Form Title	Study Name	Form Type		Action	
	Jun 20, 2023	QA analysts11		Test Form		New Survey Assigned	
	Jun 19, 2023	Type002		1 One que	stion	Survey Completed	
	Jun 19, 2023	Type002		1 One que	stion	New Survey Assigned	
	Jun 19, 2023	Type002		1 One que	stion	Survey Completed	
	Jun 19, 2023	Type002		1 One que	stion	Survey Completed	
	Jun 19, 2023	Type002		1 One que	stion	New Survey Assigned	
	Jun 19, 2023	Type002		1 One que	stion	New Survey Assigned	
	Jun 19, 2023	Type002		1 One que	stion	Survey Completed	
	Jun 19, 2023	Type002		1 One que	stion	New Survey Assigned	
	May 04, 2023	rec form test		1 One que	stion	Survey Completed	
-	Show 10 ¥			≪ < 1 2 > ≫			o



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# 14. Viewing Forms

This section describes the form view in the application.

Ge	meral Forms Suppl	ementary Forms								
Showin	ng 10 entries out of 294									Q Search
	Title	Study Name	Organization	Туре	Created By	Date Created	Date Updated	Status	Responses	Actions
	Demonstration			Dermatology	testingstage@test.com	Jun 27, 2023	Jun 27, 2023	draft	0	
	TechDemo			Tenzing's Type	testingstage@test.com	Jun 27, 2023	Jun 27, 2023	published	0	
	TESTPDF			Site Feasibility	ovasilenko@ecisys.com	May 5, 2021	Jun 27, 2023	published	0	
	Test Survey			SE Training	mirfanullah@transperfect.com	Mar 11, 2019	Jun 27. 2023	published	5	
	emas study	cns study		Site Feasibility	msmyth@transperfect.com	Jun 9, 2021	Jun 27, 2023	published	0	
	Sites Demo 1			Site Feasibility	testingstage@test.com	Jun 26. 2023	Jun 27. 2023	draft	0	
	TEST			Rater Questionnaire	ovasilenko@ecisys.com	May 19, 2022	Jun 23, 2023	published	7	
	4617			Monitoring Visit Form	ovasilenko@ecisys.com	Jul 21, 2021	Jun 23. 2023	published	3	
	weq			Rater Questionnaire	ovasilenko@ecisys.com	Apr 12, 2022	Apr 12, 2022	published	0	
	PDF_Generation			Chris Testing	ovasilenko@ecisys.com	Jun 17. 2020	Aug 19, 2021	published	13	
Show	₩ 10 ¥				≪ < 1 2 3 4 5 > ≫					

## 14.1 The Form Dashboard

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

T	NTER	ACTIVE	🔶 InternalTest 🗸						(	🔊 🙆 testi	ngstage@test.c
	Gei	neral Forms	Supplementary Forms								
+	Shawin	ng 10 entries out of 21	4								Q Search T
		Title	Study Name	Organization	Туре	Created By	Date Created	Date Updated	Status	Responses	Actions
		Demonstration	1		Dermatology	testingstage@test.com	Jun 27, 2023	Jun 27, 2023	draft	0	-
•		TechDemo			Tenzing's Type	testingstage@test.com	Jun 27, 2023	Jun 27, 2023	published	0	
		TESTPDF			Site Feasibility	ovasilenko@ecisys.com	May 5, 2021	Jun 27, 2023	published	0	-
*		Test Survey			SE Training	mirfanullah@transperfect.com	Mar 11, 2019	Jun 27, 2023	published	5	-
		emas study	cns study		Site Feasibility	msmyth@transperfect.com	Jun 9, 2021	Jun 27, 2023	published	0	
<b>0</b> 6		Sites Demo 1			Site Feasibility	testingstage@test.com	Jun 26. 2023	Jun 27. 2023	draft	0	-
		TEST			Rater Questionnaire	ovasilenko@ecisys.com	May 19, 2022	Jun 23, 2023	published	7	
		4617			Monitoring Visit Form	ovasilenko@ecisys.com	Jul 21, 2021	Jun 23. 2023	published	3	-
		weq			Rater Questionnaire	ovasilenko@ecisys.com	Apr 12, 2022	Apr 12, 2022	published	0	
		PDF_Generation	n		Chris Testing	ovasilenko@ecisys.com	Jun 17. 2020	Aug 19, 2021	published	13	
	Show	V 10 ¥				≪ < 1 2 3 4 5 > ≫					o

The Form Dashboard provides the following:

- <u>Searching for Forms</u>
- <u>Filtering of Forms</u>
- <u>Refreshing Forms page</u>
- 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.

+	Ger	neral Forms Supplemen	itary Forms								
<u> </u>	Showin	g 10 entries out of 17						Dem	0	×	Q Search T
		Title	Study Name	Organization	Туре	Created By	Date Created	Date Updated	Status	Responses	Actions
		Demo1			Chris Testing	testingstage@test.com	Jun 27, 2023	Jun 27, 2023	published	0	
•		Demonstration			Dermatology	testingstage@test.com	Jun 27, 2023	Jun 27, 2023	draft	0	
		TechDemo			Tenzing's Type	testingstage@test.com	Jun 27, 2023	Jun 27, 2023	published	0	
*		Sites Demo 1			Site Feasibility	testingstage@test.com	Jun 26, 2023	Jun 27. 2023	draft	0	
		Demo 0822			Site Feasibility	Athapar@transperfect.com	Aug 22, 2019	Feb 18, 2020	published	0	
¢\$		Scoring Demo			Dermatology	agourvitz@transperfect.com	Jul 1, 2015	Feb 18, 2020	published	2	
_		EF Training Demo	TP10001		Dermatology	agourvitz@transperfect.com	Jul 7, 2015	Feb 18, 2020	published	5	
•		Katya Demo	TP1972636	TransPerfect	Oncology Phase 1	agourvitz@transperfect.com	Jul 1, 2015	Feb 18, 2020	published	2	
		Test Lib	TestingCircuits	Tolik	Oncology Phase 2	demoadmin@ti.com	Feb 25, 2015	Feb 18, 2020	published	0	
		Demo DIA Sales			Dermatology	agourvitz@transperfect.com	Jun 10, 2015	Feb 18, 2020	published	0	
	Show	10 *				≪ < 1 2 > ≫					ø

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:



 Click the Filter T 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.

G	eneral Forms	Supple	mentary Forms										
Show	ing 1 entries out of 1												Q Search
	Title		Study Name	Organization	Туре		Created By	Date Created	Date Updated	Status		Responses	Actions
ŀ	t Demo	×			Tenzing's	×				al	*		
\$	TechDemo				Tenzing's Type		testingstage@test.com	Jun 27. 2023	Jun 27. 2023	published		0	
sho	w 10 ¥												ø

#### 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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				-								
<b>`</b>	Ge	eneral Forms Supplementary Forms										
•	Shawin	g 10 entries out of 295									Q Search T	
		Title	Study Name	Organization	Туре	Created By	Date Created	Date Updated	Status	Responses	Actions	
		Demo1			Chris Testing	testingstage@test.com	Jun 27, 2023	Jun 27, 2023	published	0		
•		Demonstration			Dermatology	testingstage@test.com	Jun 27, 2023	Jun 27, 2023	draft	0	-	
		TechDemo			Tenzing's Type	testingstage@test.com	Jun 27, 2023	Jun 27, 2023	published	0		
۳.		TESTPDF			Site Feasibility	ovasilenko@ecisys.com	May 5, 2021	Jun 27, 2023	published	0		
		Test Survey			SE Training	mirfanullah@transperfect.com	Mar 11, 2019	Jun 27, 2023	published	5	-	
o;		emas study	cns study		Site Feasibility	msmyth@transperfect.com	Jun 9, 2021	Jun 27, 2023	published	0		
_		Sites Demo 1			Site Feasibility	testingstage@test.com	Jun 26, 2023	Jun 27, 2023	draft	0	-	
		TEST			Rater Questionnaire	ovasilenko@ecisys.com	May 19, 2022	Jun 23, 2023	published	7	-	
		4617			Monitoring Visit Form	ovasilenko@ecisys.com	Jul 21, 2021	Jun 23, 2023	published	3	-	
		weq			Rater Questionnaire	ovasilenko@ecisys.com	Apr 12, 2022	Apr 12, 2022	published	0	-	
	Show	10 *				≪ < 1 2 3 4 5 > ≫					0	

#### 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.

* +	T TRACTIVE	Test12345	Study: Clinical Trial Type: D All types - all required Organization: Holy Hospital	star e
	Instructions			
•	Select / Deselect All			
*	General			ℓ] Ø O O ×
06	1.1 Comments Field *			2 8 <b>0 0 x</b>
	2.2 Date Field *			ℓ] <b>C O O X</b>
	3.3 Multiple Choice-Checkbox*     31     32     33			2) C O O X

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.

Title	Study Name	Organization	Туре	Created By	Date Created	Date Updated	Status	Responses	Actions
Demo1			Chris Testing	testingstage@test.com	Jun 27, 2023	jun 27. 2023	published	0	
Demonstration			Dermatology	testingstage@test.com	Jun 27, 2023	jun 27, 2023	draft	0	***
TechDemo			Tenzing's Type	testingstage@test.com	Jun 27, 2023	jun 27. 2023	published	0	
TESTPDF			Site Feasibility	ovasilenko@ecisys.com	May 5, 2021	jun 27, 2023	published	0	
Test Survey			SE Training	mirfanullah@transperfect.com	Mar 11, 2019	Jun 27, 2023	published	5	***
emas study	cns study		Site Feasibility	msmyth@transperfect.com	Jun 9, 2021	jun 27. 2023	published	0	***
Sites Demo 1			Site Feasibility	testingstage@test.com	Jun 26, 2023	Jun 27. 2023	draft	0	
TEST			Rater Questionnaire	ovasilenko@ecisys.com	May 19, 2022	Jun 23. 2023	published	7	***
4617			Monitoring Visit Form	ovasileriko@ecisys.com	Jul 21, 2021	jun 23, 2023	published	3	
			Pater Questionnaire	mustilenkoRecipus com	Apr 12, 2022	Apr 12, 2022	published	0	

#### 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. <u>Delete Form</u>

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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.
- 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.

General	Overview CDA	Report Analyze Report							
Select 🗸	Selected Items 🗸	≛ Export _≛ Import	C Mass update			0	T Filters	Select col	lumns
Showing 1 entrie	rs out of 1							Selected 0 e	entries (
Recipier	nt 🕈	Last Updated 🌻	Date Responded 🗢	Response Status	Approving Status	Supplementary Status		Files Acti	lons
mkandh								N/A •	
Show 10	~						Delete S Delete S	ent Form uppermentary	

- 5. The Delete Sent Form popup window is displayed.
- 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.

General Forms Supple	ementary Forms								
Showing 10 entries out of 124									Q Search T
Title	Study Name	Organization	Туре	Created By	Date Created	Date Updated	Status	Responses	Actions
🖈 Test 09									
🏫 Test demo01	Clinical Trial	Holy Hospital	Test Form	qa+manager@ecisys.com	Jun 20. 2023	Jul 14, 2023	published	0 Save to L	ibrary
🟫 Test798	Clinical Trial	Holy Hospital	Monitoring Visit Form	qa+manager@ecisys.com	Jun 23, 2023	Jul 13, 2023	published	1 Convert t	to Draft
🟫 Demo782			1 One question	qa+manager@ecisys.com	Jul 6, 2023	Jul 13, 2023	published	0	- U
monitoring test123			1 One question	qa+manager@ecisys.com	Mar 22, 2022	Jul 13, 2023	published	6	
🟫 Tester23			Rater Questionnaire	qa+manager@ecisys.com	Jun 30. 2023	Jul 13. 2023	published	1	
🟫 Demo75			1 One question	qa+manager@ecisys.com	Jul 12, 2023	Jul 12, 2023	draft	0	
1 EF-2.5.1			Rater Questionnaire	qa+manager@ecisys.com	May 19, 2022	Jul 12, 2023	published	1	
🟫 eFeasibility UAT			1 One question	qa+manager@ecisys.com	Jul 12, 2023	Jul 12, 2023	draft	0	
🔯 Docu			Site Feasibility	qa+manager@ecisys.com	Jul 7, 2023	Jul 12, 2023	published	0	
thow to H				<<12345>>>					~

- 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.

√Ĕ	eFeasibility v2.6 – Manager User Guide	.	Version 1.0 Page 103 of 197
Del	ete Form		
1 De Pleas	eletion is final and the form cannot be restored once deleted re provide the reason for deletion *		
For	n no longer required.		
	Cancel Delete		

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

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

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).



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 (\*).
- Select the Type of form as 'Supplementary' from the dropdown menu. Field is marked with an asterisk (\*). Refer to the screenshot below.

Create new form	
	Create From Existing Form
Title*	Tech Demo 798
Treat	• • • • • • • • • • • • • • • • • • •
type-	Supplementary Forms
	Choose type
	3 All types - all required
	empty
Study	Multiple Choice
Organization	New Supplementary Form title
O Ban McOron	Q&A
Instructions	Rater Questionnaire
	Supplementary Forms
	Test Form
	Testing 123
	4
	Continue

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.

Create new form	
	Create From Existing Form
Title*	Tech Demo 798
Type*	Supplementary Forms
	Preview available System Generated Questions for selected type
Study	
Organization	
Instructions	This form is required.
	Continue

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- 6. The form opens in the grid with all the details filled.
- 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.

T	ITÊRÁCŤIVĚ \star 🕬24 🖌			۵.	*
•	TINTERACTIVE	Tech Demo 798	Study: Type: Supplementary Forms		or Not
₽	Instructions		Organization:		p QUES
•	Select / Deselect All				- Q
¥	General			ମ୍ବ 🗷 🛛	O X NOT
<b>o</b> ;	1. what are clinical trials?			£) <b>∅</b> Ø	0 × 0
•	Clinical tride, are research studies that test a medical, surgical, or behavioral intervension in people. :				
	2. Middle Name			£ 8 0	o ×
	3. First Name			Ø Ø O	o ×
	4 Fmail			61 R 0	0 x
					• •
		Close Actions A Publish			

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

Publish Form?
Once you Publish the form, it cannot be edited further. Please confirm that you would like to publish the form.
Form type:
Simple form.  Monitoring Visit form.  Recurring form.  Anonymous form.  Autilities a leading.
Save form to the library
Agree form to the initial y.     Require attachments from recipients.
Cancel Publish

9. Click Yes in the Supplementary Form popup window.

Supplementary Form		
Are you sure you would like to publish form as Supplementary?		
No		

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

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Gene	ral Forms Sup	plementary Forms							
Showing 3	entries out of 3	/							Q Search T
	Title	Study Name	Organization	Type	Created By	Date Created	Date Updated	Parent Form	Actions
۲	Tech Demo 798			Supplementary Forms	qa+manager@ecisys.com	Jul 3, 2023	Jul 3, 2023	0	
۲	Supplementary for	m		1 One question	qa+manager@ecisys.com	Jun 21, 2023	Jul 3. 2023	5	
۲	Supplementary for	m		empty	qa+manager@ecisys.com	Jun 21, 2023	Jun 23, 2023	4	
Show	10 👻								c

#### To Create from Existing Supplementary Form

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

Create new form	
[	Create From Existing Form
Search existing form	Q Search
Title*	
Туре*	Choose type

- 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.

		Q Search	Choose form type	~	Date Created:	to:	8	
owing 4 an	tries out of 4						Act	ions 🗸
iew	Title	Study Name	Organization		lype	Date Created	Comments	Delete
۵	Type001				Rater Questionnaire	Jun 20, 2023		×
۲	13				Rater Questionnaire	Feb 1, 2021		×
۲	12				8 All types - all required	Feb 1, 2021		×
۲	II1				One question	Feb 1, 2021		×
ow 10	•							o

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

NTERACTI	VĒ	eFeasibility v2.6 – Manager Use	r Guide	Ver Pag	rsion 1.0 ge 108 of 19	)7
	Create	new form				
		✓ Create Fro	m Existing Form			
		Search existing form Type001	۵	Search		

#### **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.

I. First Name				2 7 0 0 ×
Durstion.*	Question type:		Content restriction:	
is it safe to conduct clinical trials on humans	Text Reld	~	No Restriction	~
Answer options				
Clinical trials do come with some risks.				×
Another				
Make required	Hidden question	Answer choices must be the same		
		Cancel Update Question		
				670
is it sale to conduct clinical trials on humans				- U U U
Jinical trials do come with some risks. :				

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


#### 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.

C	NTERACTIVE 🏫 QAmanual25	*							Ç,	▲ qa+manager@ecisy
»	☆ Simple form - 1 question @	Set Due Date								<i>⊲</i> ∄ Send
Ť	General Overview CDA	Report Analyze Report								
6	Select V Selected Items V	▲ Export ▲ Import	C Mass update			0 11	Filters (1) Select	columns	»	
	Showing 10 entries out of 34						Selecte	d D entries		
	Recipient \$	Last Updated ©	Date Responded	Response Status	Approving Status	Supplementary Status	Files	Actions		
245	qa+12304049@ecisys.com	Jun 30, 2023		Sent, no response	N/A	N/A	N/A		17 (580-	-17 Gay
-	qa+12304049@ecisys.com	Jun 30, 2023	Jun 30, 2023	Responded, viewed	N/A	Responded, viewed 🔶	N/A			
	qa+11@ecisys.com	Jun 30, 2023		Sent, no response	N/A	N/A	N/A			
•	qa+11@ecisys.com	Jun 30, 2023		Sent, no response	N/A	N/A	N/A			
_	qa+manager@ecisys.com	Jun 30, 2023		Sent, na response	N/A	Responded, viewed ->	N/A			
••••	qa+11@ecisys.com	Jun 29, 2023	Jun 30, 2023	Responded, viewed	Approved	Sent, no response 🔶 🛙	Delete Sent Form	-		With responses Without responses
	qa+11@ecisys.com	Jun 29, 2023		Sent, na response	N/A	N/A	Delete Supplementa	ry 🛃	_	
	qa+manager@ecisys.com	Jun 27, 2023		Sent, na response	N/A	N/A	N/A			10
	qa+manager@ecisys.com	Jun 27, 2023	Jun 27, 2023	Responded, viewed	Approved 😜	Sent, no response 🔶	N/A			-12 (350
	QA+11@ECISYS.COM	Jun 26, 2023	Jun 26, 2023	Responded, viewed	Approved 😜	N/A	N/A			
	Show 10 Y			«<1234>»					17 529-	4 120 Responded, viewed Responded, not viewed Seei, no responses Decimal

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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.



- 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.



#### 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.

Documentation O Set Due E	Date						
General Overview CDA	Report Analyze Rep	ort					
Select 🗸 Selected Items 🗸	🛓 Export 🛛 🛓 Impo	rt 🛛 🕫 Mass update			😂 🗡 Filt	xers 🗉	Select columns
ihowing 1 entries out of 1							Selected 1 entries
Recipient 🗢	Last Updated 🗢	Date Responded 🗢	Response Status	Approving Status	Supplementary Status	Files	Actions
qa2+1@ecisys.com	Jul 7, 2023	Jul 7, 2023	Responded, viewed	N/A	N/A	N/A	

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

Threadfive	Documentation	Send Supplementary Edit Response Save as PDF
Main Form		-
1. Last Name		
qa2+1@ecisys.com		
2. Middle Name		
3. First Name		
4. Email		
5. Institution Name		
6. Institution Address 1		
7. Institution Address 2		
	Close Brieft America	

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.

Send Supplementary	Update Response	Save as PDF

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

- 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**.

Update Survey Response	
Please provide the reason for updating *	
Updated the answers.	
Send email notification to recipient	
Cancel 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.

					_
TO INTERACT	WE	Docume	ntation	Send Supplementary Edit Response Save as PO	3
Main Form				-	-
	Last Name				Ť.
		(F 100 () - 101			L
2.1	Middle Nome				II.
	[	<b>a</b> 8			L
3.1	First Name				L
		sho			Ь.
4.1	Email				
	L	shnka@gmail.com			
5.1	Institution Name				
6.1	Institution Address				
7.1	institution Address				
		0	ose Reject Approve		

- 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.

Approving Site	Reject Site				
Are you sure you would like to approve this survey?	• Are you sure you would like to reject this survey?				
Cancel Ok	Cancel Ok				

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

# 

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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.

Select V Selected Items	v ≛Export ≛in	nport C Mass update			a	▼ Filters	Select columns
owing 1 entries out of 1		port 2 mass operate			5		Selected 0 entries
Recipient ¢	Last Updated 🌻	Date Responded 🌩	Response Status	Approving Status	Supplementary Status	File	es Actions
qa2+1@ecisys.com	Jul 7, 2023	Jul 7, 2023	Responded, viewed	Approved	N/A	N/4	A
Documentation O Set	Due Date						
Documentation © Set	Due Date DA Report Analyze	Report					
Documentation © Set Seneral Overview Cl Select V Selected Items	Due Date DA Report Analyze s → ▲Export ▲Ir	Report mport ØMass update			c	▼ Filters	<ul> <li>Select colu</li> </ul>
Documentation © Set General Overview Cl Select V Selected item: paring 1 entries out of 1	Due Date DA <b>Report Analyze</b> s ✔ ▲Export ▲Ir	Report mport ØMass update			c	<b>▼</b> Filters	Select colu Selected 0 en
Cocumentation O Set General Overview Cl Select  Selected item: awing 1 entries out of 1 Recipient  \$	Due Date DA Report Analyze s & & Export & In Last Updated \$	Report mport @Mass update Date Responded +	Response Status	Approving Status	C Supplementary Status	<b>▼</b> Filters	Select colu Selected 0 en Files Action

## 15. Form Statistics Page

V O	/hen a Form is published, you are redirected to a Form Statistics Page which display <mark>the</mark> complete overview f a Form.	Commented [SJ2]: Add screenshots from this section to XML-12/7/23

	A L ★ Qa24 ✔								Ō® (
no 🗘	nitoring test123 @ Set	Due Date							
+ Gene	eral Overview CDA	Report Analyze Report							
E sel	ect 🗸 Selected Items 🗸	≛Export ≛Import	C Mass update			2 T Filters	III Sel	ect columns	»
Showing	7 entries out of 7						Sele	cted 0 entries ()	
	ecipient •	Last Updated	Date Responded	Response status	Approving Status	Supplementary Status	Files	Actions	3 (43%-
*	kandhare@transperfect.com	Jun 21, 2023	Jun 22, 2023	Responded, viewed	Approved	Responded, viewed -	N/A		
	a+manager@ecisys.com	Jun 19, 2023		Sent, no response	N/A	N/A	N/A		
°6 🔹	a2+alina@ecisys.com	Jun 1, 2022		Sent, no response	N/A	N/A	N/A		
	a+submitter@ecisys.com	Mar 22, 2022	Mar 22, 2022	Responded, viewed	Approved	Responded, viewed 🔶	N/A		
-	a+submitter+33@ecisys.com	Mar 22, 2022	Jun 23, 2023	Responded, viewed	N/A	N/A	N/A		=
9	a+submitter@ecisys.com	Mar 22, 2022		Sent, no response	N/A	N/A	N/A		
Show	10 •								3 (450- 0.025 Re 5 5 0 D

The Form Statistics page includes the following functions:

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

#### 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.

🛛 🖈 Send

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

*	Recipients:	Insert Recipients 🗸	Email Configuration
+	Another	Import contact Existing contacts	From (email address):
			NO_REPLY @ trialinteractive.com v
			Email Subject:
			New eFeasibility questionnaire request
			Emailest Normai · (T·Δ·B/坦臣臣x, ポヨ臣臣王ヨきcock & ー +> 00 0 *
OC SO			Helo,
			We are inal interactive, a premer provider or eclinical lectinologies and services, we are conducting feasibility for one or our upcoming studies and we would like to invite you to participate. Here is a link to the questionnaite
			This link is uniquely tied to this questionnaire and your email address. Please do not forward this message.
			If you have any questions about the questionnaire or Trial Interactive please visit us at www.trialinteractive.com or e-mail us at helpititrialinteractive.com
			Thank you for your participation!
			sincerey, Trial Interactive Team
			Insertions: To use an insertion, place cursor where you would like the insertion to happen, press on the insertion icon <b>Q</b> and select a desired insertion.
			<ul> <li>Do you want to get notified when form responses are received?</li> <li>Do you want to display form confirmation page?</li> </ul>
			Cancel Add attachment Send

#### 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.

T R I A L INTERACTIVE	eFeasibility v2.6 – Mar	nager User Guide	Version 1.0 Page 117 of 197	
Recipients:	:ct.com	Insert Recipients In Import contact Existing contacts		
sperfe	ct.com	×	×	
yin	t.com	×	×	
sja fe Another	t.com	×	×	

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.

ACTIVE	eFeasibility
Desiniants	

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-------------	--------	---------	------------	--

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Recipients:	Insert Recipients 🗸
m r.com	×
a er.com	×
am - Cincom	×
sjage i.com	×
yingcom	

#### 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.

elect Existing Contacts	Contacts The Drag-n-drop contacts into this column	
Search	Groups Search	
qa2+1@ecisys.com		:
qa2+2@ecisys.com	Olivethedog@fakeemail.com	1
qa2+7@ecisys.com	admi10ti10@gmail.com	1
ashj@fakemail.com	alprokopovich+aa@ecisys.com	1
qa2+3@ecisys.com		
Olivethedog@fakeemail.com		
qa2+82@ecisys.com		
qa2+4@ecisys.com		
qa2+5@ecisys.com		
admi10ti10@gmail.com		
qa2+v@ecisys.com		
03746@acieve.com	v	

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 <u>domain</u> name from the dropdown.

Email Configuration			
From (email address):			
NO_REPLY	@	trialinteractive.com	~
		trialinteractive.com efeasibility.ecisys.net transperfect.com	

#### 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.

Email Subject:	
New eFeasibilit	y questionnaire request

#### 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.

nail Text:
Normal → ਜ- <u>A</u> ·B / ⊻ ⊨ ∺ x <sub>2</sub> xੇ 理 판 판 표 표 표 중 co qb & — ↔ O @ ₩
Hello, We are Trial Interactive, a premier provider of eClinical Technologies and Services. We are conducting feasibility for one of our upcoming studies and we would like to invite you to participate. Here its a limit to the questionnaire This limit is uniquely tied to this questionnaire and your email address. Please do not forward this message. If you have any questions about the questionnaire or Trial Interactive please visit us at <u>www.trialinteractive.com</u> or e-mail us at <u>help@trialinteractive.com</u> Thank you for your participation.
Sincerely, Trial Interactive Team sertions: To use an insertion, place cursor where you would like the insertion to happen, press on the insertion icon <b>Q</b> and select a desired insertion.
Do you want to get notified when form responses are received? Do you want to display form confirmation page?
Cancel Add attachment Send

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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.

Cancel	Add attachment	Send			
ExportMetadata	a_Training Team eTMF Room	_2023-06-28 00-16-50	787.xlsx:10. Cancel	Add attachment	Send

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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.

Sending emails...

Email statistics can be viewed under background jobs

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:

(≩ qa+manager@ecisy↓		
Background Jobs		
Send Form Emails	×	b.
Status: 100%	Completed	
Start date: 1 minute ago		
Completed date: 1 minute ago		
total: 4 failed: 0 succeed: 4		
Send Form Emails	×	
Status: 100%	Completed	
Start date: Jun 23, 2023 19:11:31		
Completed date: Jun 23, 2023 19:11:33		
total: 1 failed: 0 succeed: 1		
Send Form Emails	×	
Status: 100%	Completed	
Start date: Jun 23, 2023 18:43:48		
· · · · · · · · · · · · · · · · · · ·	•	٣
Close		

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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.

General Preview	Overview	CDA	Report	Analyz	e Report	
د Preview ماس	化 Charlen Contract of Contrac	form	🗏 Close For	rm O	D Enable CDA	
You can also save this Published Form as PDF by clicking Save as PDF by the 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.						
T INTERACTIVE			monitoring test12	l.		Save as PDF
General						
1. FIRST QUESTIO	•					

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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.

Tidemo231 @ Set Du	e Date			4
General Overview	CDA Report Analy	te Report		
Preview     Piedit fo		D Enable CDA		
About this Form		General settings	Form approving mapp	ning 🕼 Edit Fields
General Information		Restrict Duplicate Responses	Ti Room ID: *	N/A ¥
Type: Multiple	Choice	Forward all notifications	Investigative Site: *	N/A 👻
		Users *	Principal Investigator: *	N/A 👻
		Cours Matter Marine	Site Number:	N/A 👻
Created By: ga+mana	iger@ecisys.com	Dunlicate Responses	Site Status Change Date:	N/A 👻
Date Created: 2023-06- Date Updated: 2023-06-	23 18:40:38 23 18:45:17	Duplicate Responses were restricted	Contact First Name:	N/A 👻
Statistic Information	Supplementary Statistic Information		Contact Last Name:	N/A 👻
Surveys sent: 1	Answers: 0		Ena	ible and Save

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.

Attention	
Recipients with the same email address was alread added to list	ly
Email	
3@gmail.com	
Ok	

#### 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.

ြူReply ြူReply All ြူForward ခြံ၊M	
Wed 6/28/2023 5:18 PM	
N NO_REPLY@trialinteractive.com	
New eFeasibility questionnaire request	
To the second	/
Suggested Meetings	+ Get more add-ins
Hello,	
We are Trial Interactive, a premier provider of eClinical Technologies and Services. We are conducting feasibility for one of our upcoming would like to invite you to participate Here is a link to the questionnaire	studies and we
This link is uniquely tied to this questionnaire and your email address. Please do not forward this message.	
If you have any questions about the questionnaire or Trial Interactive please visit us at www.trialinteractive.com or e-mail us at help@trialinteractive.com or e-mail us at	alinteractive.com
Thank you for your participation!	
Sincerely,	
Links contained in this email have been replaced. If you click on a link in the email above, the link will be analyzed for known threats. If a found, you will not be able to proceed to the destination. If suspicious content is detected, you will see a warning.	known threat is

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.

				,		F	Page	125 of 197
control monitoring test 123 O Set Due Date	9							4
General Overview CDA Report	t Analyze Report							
Select V Selected Items V & D	iport <b>±</b> import C	Mass update			C T Riters	Select	columns	»
Recipient #	Last Updated 🌻	Date Responded ¢	Response Status	Approving Status	Supplementary Status	Files	Actions	
Lcom	Jun 28, 2023		Sent, no response	N/A	N/A	N/A		
si et.com	Jun 28, 2023	Jun 28, 2023	Responded, not viewed	N/A	N/A	N/A		7.58%-
admi10ti10@gmail.com	Jun 28, 2023		Sent. no response	N/A	N/A	N/A		
com	Jun 28. 2023		Sent, no response	N/A	N/A	N/A		
Olivethedog@fakeemail.com	Jun 28, 2023		Sent, no response	N/A	N/A	N/A		With responses
pct.com	Jun 23, 2023	jun 23, 2023	Responded, viewed	Approved	Sent, no response 🔶	N/A		Without responses
mi .com	Jun 21, 2023	Jun 22, 2023	Responded, viewed	Approved	Responded, viewed 🔶	N/A		0.000
qa+manager@ecisys.com	Jun 19, 2023		Sent, no response	N/A	N/A	N/A.	***	
qa2+alina@ecisys.com	Jun 1. 2022		Sent, no response	N/A	N/A	N/A.		
qa+submitter@ecisys.com	Mar 22, 2022	Mar 22, 2022	Responded, viewed	Approved	Responded, viewed 🔶	N/A		7380

#### 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.

🟠 monitorii	🕑 Set				
General	Overview	CDA	Report	An	alyze Report
Preview	/ 🖒 Edit f	form	🖹 Close For	rm	① Enable CDA

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

Close Form	
• Are you sure you would like to form?	stop receiving responses for this
No	Yes

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.

) T INT	R I A L ERACTIVE eFeasibility v2.6 – Manager User Guide	Version 1.0 Page 126 of 197
	Email Template	
	Email Subject:	
	Questionnaire enrollment has been closed.	
	Email Text:	
	Normal → ਜਾ <u>A</u> ·B/U;; ; ; ; ; ; x₂ x² ⊡ 판 판 판 표 표 중 cooledo ≪ —	
	Dear \$(recipientEmail),	
	"We are sorry. The enrollment for this questionnaire, '\${formTitle}', has been closed. If you have any questions, please contact help@trialinteractive.com."	
	Sincerely, Trial Interactive Team	
	Insertions: To use an insertion, place cursor where you would like the insertion to happen, press on the insertion icon • and select a desired insertion.	
	Cancel	

#### 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.

🟫 monitorii	ng test123						
Conservation	Quantization	CD A	Dement		han Demont		
General	Overview	erview CDA		Ana	lyze Report		
Preview	් රිට් Edit fo	අ Edit form		Form	① Enable CDA		

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.



## 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.

General settings	
Restrict Duplicate Responses     Enable Sharing Link	
https://ef-stg.trialinteractive.net/free/share_survey/share_survey.html? siteid=41456428-2eda-4a89-96a3-908531a23690&formid=6159e1c9-3bf5-410f- a8f5-2200a7048cf7	
Forward all notifications	
OSETS *	d
Save Notifications	
Form Share Link	
Form Share Link was enabled	
Ok	

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.



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

elect 🗸 Selected Items 🗸 🔺	ixport 🛓 import 🗘	Mass update			2 T Filters	III Select	columns	>>	
cipient :	Search Date 5	ient: 🗂 🗂 to	· · · · · · · ·	Date Responded :	to:				
g 10 entries out of 12						Selecter	d D entries 0		
Recipient ©	Last Updated 🌢	Date Responded ©	Response Status	Approving Status	Supplementary Status	Files	Actions		
nkandhare@transperfect.com	Jun 28, 2023	Jun 29, 2023	Declined	N/A	N/A	N/A			
ineha.jagavkar@transperfect.com	Jun 28, 2023	Jun 28, 2023	Responded, not viewed	N/A	N/A	N/A	-		
admi10ti10@gmail.com	Jun 28. 2023	0	Sent, no response	N/A	N/A	N/A			
qa2+3@ecisys.com	Jun 28, 2023		Sent, no response	N/A	N/A	N/A			With responses Without responses
Dlivethedog@fakeemail.com	Jun 28, 2023		Sent, no response	N/A	N/A	N/A			
nkandhare@transperfect.com	Jun 23, 2023	Jun 23. 2023	Responded, viewed	Approved	Sent. no response 🔶	N/A			1 (25)
nkandhare@transperfect.com	Jun 21, 2023	jun 22, 2023	Responded, viewed	Approved	Responded, viewed 🔶	N/A			
a+manager@ecisys.com	Jun 19, 2023		Sent, no response	N/A	N/A	N/A			
a2+alina@ecisys.com	Jun 1. 2022		Sent, no response	N/A	N/A	N/A			
a+submitter@ecisys.com	Mar 22, 2022	Mar 22, 2022	Responded, viewed	Approved	Responded, viewed 🔶	N/A		8 (10%)-	

#### 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.

General	Overview	CDA	Report	Analyze Repor	rt	
Select 🗸	Selected	Items 🗸	📥 Expo	ort 🏦 Import	😂 Mass upd	ate
Showing 10 entrie	es or Export	>				
Recipient	t 🗢 Resend			Last Updated	d 🗢 🛛 Date	Responded 🗢
mkandha	arei Send Su	pplementa	ry Form	Jun 28, 2023		
sneha.jag	Resend	to TMF		Jun 28, 2023	Jun 2	28, 2023
	Re-subr	nit		,	,	
admi10ti	<sup>100</sup> Decline	he		Jun 28, 2023		
a21.20a	sicus com			Jun 20 2022		

- 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.

Decline Form	
Review selected items and specify reason for de	clining
Recipient	Reason For Declining *
mkandhare@transperfect.com	Recipient no longer required.
Cancel	Decline

- 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.

Success	
☑ Form(s) was(re) declined successfully. Form state is being indexing, that's why it's status will be changed on next reloading	
Ok	di la

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G	eneral	Overview CD/	Report	Analyze Report								
	Select 🗸	Selected Items	<ul> <li>Export</li> </ul>	t 🚨 Import	C Mass update			ø	<b>T</b> Filters	🖽 Selec	t columns	
Shov	ving 10 entri	es out of 12								Select	ed 0 entries	0
	Recipien	t <b>0</b>		Last Updated 🌻	Date Responded 🌻	Response Status	Approving Status	Supplementary S	itatus	Files	Actions	
	mkandh	are@transperfect.cor	n	Jun 28, 2023	Jun 29, 2023	Declined	N/A	N/A		N/A		1
	sneha.ja	gavkar@transperfect.	com	Jun 28, 2023	Jun 28, 2023	Responded, not viewed	N/A	N/A		N/A		1
	admi10t	10@gmail.com		Jun 28, 2023		Sent, no response	N/A	N/A		N/A		
	qa2+3@i	cisys.com		Jun 28, 2023		Sent, no response	N/A	N/A		N/A		

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 <u>Confidentiality</u> <u>Disclosure Agreement (CDA)</u>.

#### 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 <u>Reports</u> for details information.

☆ monitoring te	st123	🕘 Set	Due Date	
General Ove	rview	CDA	Report	Analyze Report

#### 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.

paing	10 entries out of 112									Q Search T
	Title	Study Name	Organization	Type	Created By	Date Created	Date Updated	Status	Responses	Actions
	Demo782			1 One question	qa+managerillecisys.com	Jul 6. 2023	Jul 6. 2023	published	0	
	Analysts001			empty	qa+manager@ecisys.com	Jun 23, 2023	Jul 6, 2023	published	1	-
	Test demo01			3 All types - all required	qa+manager⊜ecisys.com	Jun 23, 2023	Jul 6, 2023	published	1	
	monitoring test123			1 One question	qa+manager@ecisys.com	Mar 22, 2022	Jul 6. 2023	published	6	-
*	23			1 One question	qa+manager⊜ecisys.com	Mar 24, 2021	Jul 4, 2023	published	2	
	Type782			Rater Questionnaire	qa+manager@ecisys.com	jun 29, 2023	Jul 4, 2023	published	2	-
	Tester23			Rater Questionnaire	qa+manager@ecisys.com	Jun 30, 2023	Jun 30, 2023	draft	0	
	МК			empty	qa+manager@ecisys.com	Jun 27, 2023	Jun 29, 2023	published	0	-
	Tidemo231			Multiple Choice	qa+manager@ecisys.com	jun 23, 2023	Jun 29, 2023	published	1	-
	Test12345				qa+manager@ecisys.com			draft		

- 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.

INTERACTIVE	Test12345	Clinical Trial 3 All types - all required Holy Hospital
Select / Deselect All		
	5 Question Edit	
	Question: *	
1.1 Comments Field *	Phase 5 Trial	삼 중 <b>O O X</b>
	Question type:	
	Comments Field	
	Answer options	
	×	
	Another	
2. 2 Date Field *	Category	n R O O ×
	Make required	
	Hidden question	
	Carried Library Institute	
3. 3 Multiple Choice-Checkbox *		입 C O O X

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

TITERACTIVE	Test12345	Clinical Trial
		3 All types - all required
		Holy Hospital
Instructions		
1. Phase 5 Trial *		2 8 O O X

#### 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.

🟫 monitor	ring test123	❷ Set [	Due Date			
General	Overview	CDA	Report	Ana	alyze Report	
Select 🗸	Selected It	tems 🗸	📥 Expo	rt	🏝 Import	C Mass update

 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.

T R I INTERAC	A L eFeas	ibility v2.6	6 – Manager	<sup>-</sup> User Guide	Version 1.0 Page 132 of 197
3. Click	Upload to upload the sourc	e file. Refer to	o the screenshot	below.	
■ Report Import 1, 2023 1, 2023 0, 2023	Please, select import source file (Microsoft Excel      Canc      Canc	Import File *		C T Filters y Status	
8 Orga	nize • New folder			i∷ • III (3)	
	Name     Vesterday (2)     ExportMetadas_Taining Team eTMF Re     Sector This woods (5)	Date modified	Type Size Microsoft Excel W 10 KB	^	
			110 gi		
	✓ Last week (7)     Gat COA1     Gi addresses     Gi adrasolity     ✓ Qi aintravel	6/23/2023 5:13 PM 6/22/2023 6:26 PM 6/22/2023 6:12 PM 6/22/2023 5:30 PM	Microsoft Edge P 19 KB Microsoft Excel C 1 KB Microsoft Excel C 1 KB Microsoft Excel C 1 KB		
	File pame: efeasibility		→ All Files	n Cancel	

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.

Please, select import source f	efeasibility.csv	
	Cancel	

5. Click the Accept button to view the import status in <u>Background Jobs</u>.

Import Answers			
Please map the columns to available	fields		
In eFeasibility	In File		
Recipient email		~	
Recipient ip		~	
Response date	1000	~	
Sender email		~	
Sent date		~	
FIRST QUESTION		~	

#### 15.15 Contact Mapping Schema

Contact Mapping Schema specifies the relationship between Questions and Contact Information. Refer section <u>Contact Configuration</u> 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.

☆ Documentation ③ Set Due Date         General       Overview       CDA       Report       Analyze Report         ● Preview       ④ Edit form       Image: Close Form       ① Enable CDA         About this Form       Image: Close Form       ① Enable CDA         viewed:       Image: Close Form       ① Enable CDA         Declined:       0       Image: Close Form       Image: Close Form         Set, no       0       Declined:       0         response:       Set, no       0       Set, no       0	☆ Documentation       ③ Set Due Date         General       Overview       CDA       Report       Analyze Report         ● Preview       ④ Edit form       Image: Close Form       ① Enable CDA         About this Form       Image: Close Form       ① Enable CDA         ✓ viewed:            Declined:       0           Sent, no       0           response:        Sent, no       0         response:	<sup>↑</sup> Documentation O Set Due Date <sup>●</sup> Preview CDA Report Analyze Report <sup>●</sup> Preview 2) Edit form <sup>●</sup> Preview 2) Edit fo	Overview       CDA       Report       Analyze       Report         Image: Second Sec		Image: Constraint of the second s		Coursentation       O set Due Date         General       Overview       CDA       Report       Analyze Report			eFeasibility v2.6	– Manager	ι
General     Overview     CDA     Report     Analyze Report <ul> <li>Preview</li> <li>Edit form</li> <li>Close Form</li> <li>Denable CDA</li> </ul> About this Form           Close Form <ul> <li>Operation</li> <li>Declined:</li> <li>Declined:</li> <li>Sent, no</li> <li>Sent, no<td>General     Overview     CDA     Report     Analyze Report            <ul> <li>Preview</li> <li>Edit form</li> <li>Close Form</li> <li>Denable CDA</li> </ul>        About this Form          viewed: Declined: 0 Sent, no 0 response: Context Manalize Chamaa</td><td>General       Overview       CDA       Report       Analyze Report            <ul> <li>Preview</li> <li>Edit form</li> <li>Close Form</li> <li>Enable CDA</li> </ul>             About this Form           Close Form          Denable CDA             Viewed:           Responded, not 0         viewed:           viewed:         Oeclined: 0         Sent, no 0         response:           Sent, no 0         response:             Contact Mapping Schema         Question           Contact field</td><td>Overview       CDA       Report       Analyze Report            • Preview          • CDA          Een of the second seco</td><td>General     Overview     CDA     Report     Analyze Report          <ul> <li>Preview</li> <li>Edit form</li> <li>Close Form</li> <li>Denable CDA</li> </ul>        About this Form       viewed:     Preview     Preview</td><td>General       Overview       CDA       Report       Analyze Report         ● Preview</td><td>General       Overview       CDA       Report       Analyze Report            <ul> <li>Preview</li> <li>Edit form</li> <li>Close Form</li> <li>Denable CDA</li> </ul>          About this Form       Image: Close Form       Operable CDA         About this Form       Image: Close Form       Operable CDA         About this Form       Image: Close Form       Operable CDA         About this Form       Image: Close Form       Image: Close Form       Image: Close Form         Declined:       0       Image: Close 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Sent. no 0 Declined: 0 response: Sent. no 0	Sent. no 0 Declined: 0 response: response: response:	Sent. no 0 Declined: 0 response: Sent. no 0 response: Contact Mapping Schema Question Contact field	Sent. no     Declined:     0       response:     Sent. no     0       response:     response:     Contact Mapping Schema       Question     Contact field     A       Last Name     Email     A	Sent. no     0       response:     Sent. no       response:     response:         Contact Mapping Schema       Question     Contact field       Last Name     Email       Middle Name     Email	Sent. no 0 Declined: 0 Sent. no 0 response: Contact Mapping Schema Question Contact field Last Name Erist Name Erist Name Email Institution Name Institution Address 1	Sent. no     0       response:     Sent. no       Question     Contact field       Last Name     Email       Middle Name     Email       First Name     Email       Institution Address 1     Institution Address 2       City     City	Sent. no     Declined:     0       response:     Sent. no     0       response:     response:     1    Question  Contact field  Last Name  Email  Middle Name  First Name Email Institution Nadress 1 Institution Address 1 Institution Address 2 City State/Province	Sent. no     0       response:     Sent. no       Question     Contact field       Last Name     Email       Middle Name     Email       First Name     Email       Institution Naffress 1     Institution Address 2       City     State/Province       Postal Code/Zip Code     Country	viewed: Declined: 0	Responded, not 0 viewed:		
	response:	Contact Mapping Schema Question Contact field	Contact Mapping Schema       Question     Contact field       Last Name     Email       Middle Name     Imail	Contact Mapping Schema       Question       Contact field       Last Name       Email       Middle Name       First Name       Email	Contact Mapping Schema       Question     Contact field       Question     Contact field       Last Name     Email       Middle Name     Email       First Name     Email       Institution Name     Institution Address 1	Contact Mapping Schema       Question     Contact field       Middle Name     Email       First Name     Email       Institution Address 1     Institution Address 2       Citiv     Citive	response:  Contact Mapping Schema Question Contact field Last Name Email Institution Name Institution Address 1 Institution Address 2 City State/Province	Contact Mapping Schema       Question     Contact field       Question     Contact field       Last Name     Email       Middle Name     Email       First Name     Email       Institution Name     Institution Address 1       Institution Address 2     City       City     State/Province       Postal Code/Zip Code     Country	Sent, no 0	Declined: 0 Sent, no 0	-	

Note: Contact Mapping Schema is visible only when Questions are mapped with the Contact Information in <u>Contact Configuration</u>.

#### 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.

Set Due Date	
Due Date:	Enable
Configure Reminders + Add Remi	Reminder Email Template
No Reminders	Normal·귀· <u>A</u> ·B / 빌 듣 든 x <sub>2</sub> 가 개 판 판 표 돼 와 co qb ★ — ☆ O @ )e
	Hello, We are Trial interactive, a premier provide of eClinical Technologies and Services. We are conducting taskability for one of our upcoming studies and we would like to invite you to participate. Here is a line to <u>the upperformance</u> This link is uniquely ted to this questionname and your email address. Please do not forward this if you have any questions about the questionname or Trial interactive please visit us at some deliniteractive control or - enal use at the deliniteractive control wave deliniteractive control or - enal use at the deliniteractive control Thank you for your participation! Sincerety, Trial interactive Ream
c	ancel Finish

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

Due Date: Due date should be afte	er curre	ent date	
		Disable	
Due Date: Jul 03, 2023			Disable

- 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



- 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.

#### Version 1.0 T R I A L INTERACTIVE eFeasibility v2.6 – Manager User Guide Page 137 of 197 Set Due Date Due Date: Jul 03, 2023 Disable + Add Reminder Configure Reminders Reminder Email Template Remind on: 👻 Jul 01, 2023 🛗 Save Cancel Normal - ਜ- <u>A</u>·B / 빌 듣 듣 x<sub>2</sub> x<sup>2</sup> 갤 판 판 표 표 용 co q6 & - ↔ O @ Date of reminding should be before due date and after current da Hello We are Trial Interactive, a premier provider of eClinical Technologies and Services. We are conducting reasibility for one of our upcoming studies and we would like to invite you to participate. <u>Here is a link to the ductionnaire</u> This link is uniquely tied to this questionnaire and your email address. Please do not forward this message If you have any questions about the questionnaire or Trial Interactive please visit us at www.trialinteractive.com or e-mail us at help@trialinteractive.com Thank you for your participation! Sincerely, Trial Interactive Team

#### 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.

Cancel

#### 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.

☆ monitoring test123 ② Set Due	Date						
General Overview CDA Re	eport Analyze Report				5		
Select 🗸 Selected Items 🗸	🛓 Export 🕹 Import 🕫 N	lass update			C Filters	🗆 Sele	ct columns
Recipient : sneha 1	Q Search Date Se	ent : Jun 21, 2023 🛪 🛗 to:	2 📫	Date Responded : Jun 2	3, 2023 🗙 🛗 to:  3	-	
Showing 2 entries out of 2 Recipient ¢	Last Updated 🌩	Date Responded 🌩	Response Status	Approving Status	Supplementary Status	Selec Files	Actions
mkandhare@transperfect.com	Jun 28, 2023	Jun 29, 2023	Declined	N/A	N/A	N/A	
sneha.jagavkar@transperfect.com	Jun 28. 2023	Jun 28. 2023	Responded, not viewed	N/A	N/A	N/A	
Show 10 10 25 50 100							

#### 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.

Recipient a	Last Lindated 🚔	Date Responded	Response Status	Annroving Status	Supplementary Status	Files A	otic
mkandhare@transperfect.com	Jun 28, 2023	Jun 29, 2023	Declined	N/A	N/A	N/A	
sneha.jagavkar@transperfect.com	Jun 28, 2023	Jun 28, 2023	Responded, not viewed	N/A	N/A	Delete Sent Form	
admi10ti10@gmail.com	Jun 28, 2023		Sent, no response	N/A	N/A	Delete Supplementary	
qa2+3@ecisys.com	Jun 28, 2023		Sent, no response	N/A	N/A	N/A	
Olivethedog@fakeemail.com	Jun 28, 2023		Sent, no response	N/A	N/A	N/A	
nkandhare@transperfect.com	Jun 23, 2023	Jun 23, 2023	Responded, viewed	Approved	Sent, no response 🔶	N/A	
mkandhare@transperfect.com	Jun 21, 2023	Jun 22, 2023	Responded, viewed	Approved	Responded, viewed 🔶	N/A	
qa+manager@ecisys.com	Jun 19, 2023		Sent, no response	N/A	N/A	N/A	
qa2+alina@ecisys.com	Jun 1, 2022		Sent, no response	N/A	N/A	N/A	
qa+submitter@ecisys.com	Mar 22, 2022	Mar 22, 2022	Responded, viewed	Approved	Responded, viewed 🔶	N/A	

• 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.

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.

- 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.

	E eFeasibili	ity v2.6 – Manager User Guide	Version 1.0 Page 140 of 197
ר א ע ע ע	Overview     CDA     Report       Selected Items         Export         Resend        Send Supplementary Form       Resend to TMF       Re-submit       D*       Decline	t Analyze Report xport 2 Import Answers For editing May 19, 2022 May 19, 2022 May 19, 2022	

- 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

Ov	erview	CDA Report					
Selected Items 🗸 🛓 Ex							
es out	Export 🕽	•					
nt 🗢	Resend						
nage	Send Sup	plementa	ary Form				
akor	Resend t	o TMF					
INCO	Re-submit						
nko+	Decline						

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.

eral Overview CDA Report	Analyze Report						
ect 🗸 Selected Item 🔽 🕹 Expor	t 🛓 Import 😂	Mass update			2 T Filters	🖽 Sele	ct col
10 entries of Export > ecipient  Resend	Last Updated 🌻	Date Responded 🗢	Response Status	Approving Status	Supplementary Status	Selec Files	ted 1. A
kandharee Send Supplementary Form	Jun 28, 2023	Jun 29, 2023	Declined	N/A	N/A	N/A	
neha.jagav Resend to TMF	Jun 28, 2023	Jun 28, 2023	Responded, not viewed	N/A	Sent, no response 🔶	N/A	
dmi10ti10( Decline L.	Jun 28, 2023		Sent, no response	N/A	N/A	N/A	
a2+3@ecisys.com	Jun 28, 2023		Sent, no response	N/A	N/A	N/A	
livethedog@fakeemail.com	Jun 28, 2023		Sent, no response	N/A	N/A	N/A	
teview selected items and specify	reason for declinir	eason For Declining	*				
a2+3@ecisys.com	×	recipient no longer requ	ired.				
	eral Overview CDA Report et	aral     Overview     CDA     Report     Analyze Report       et >     Sectod Item     ▲ Export     Lingott     C       19 envirsi it     Export     Last Updated ●     Jun 28, 2023       weha Jagar     Result on TMF     Jun 28, 2023     Jun 28, 2023       aparticities     Result on TMF     Jun 28, 2023       aparticities     Jun 28, 2023     Jun 28, 2023       cline     Form     Jun 28, 2023       cline     Form     Jun 28, 2023       aparticities     Last Updated ©     Jun 28, 2023       aparticities     Jun 28, 2023     Jun 28, 2023       aparticities     Jun 28, 2023     Jun 28, 2023       apar	aral       Overview       CDA       Report       Analyze Report         ett       Sectors & Limport       O Mass update         19 errors & Export       Last Updated ©       Date Responded ©         yun 28, 2023       yun 29, 2023       yun 29, 2023         yun 28, 2023       yun 28, 2023       yun 28, 2023         wethedog@dekeemal.com       yun 28, 2023       yun 28, 2023         biedbeckgedekeemal.com       yun 28, 2023       yun 28, 2023         cline Form       garage       Reason For Declining         recipient       Reason For Declining       recipient no longer requirements	arral       Overview       CDA       Report       Analyze Report         ett       Selected Item       Last Updated       Date Responded ©       Response Status         19 evens in that Augustion       Export       Last Updated       Date Responded ©       Response Status         un 28, 2023       Jun 28, 2023       Jun 28, 2023       Declined       Jun 28, 2023       Responded, not viewed         un 28, 2023       Jun 28, 2023       Sent, no response       Jun 28, 2023       Sent, no response         22.9Beckgy.com       Jun 28, 2023       Sent, no response       Jun 28, 2023       Sent, no response         Dister Form       Jun 28, 2023       Sent, no response       Sent, no response         cline Form       Jun 28, 2023       Sent, no response         ecipient       Reason For Declining *       Reason For Declining *         sp2+3@eclsys.com       X       recipient no longer required.	arral       Overview       CDA       Report       Analyze Report         ett       Sectors Removed Analyze Report       Mass update         19 evenue in Export       Last Updated       Date Responsed Analyze Reportes         19 evenue in Export       Last Updated       Date Responsed Analyze Reportes         19 evenue in Export       Last Updated       Date Responsed Analyze Reportes         19 evenue in Export       Last Updated       Date Responsed Analyze Reportes         19 evenue in Export       Last Updated       Date Responsed Analyze Reportes         19 evenue in Export       Last Updated       Date Responsed Analyze Reportes         19 evenue in Export       Last Updated       Date Responsed Analyze Reportes         19 evenue in Export       Last Updated       Date Responsed N/A         19 evenue in Export       Last 2023       Sent. no response       N/A         20:09excom       Jun 28, 2023       Sent. no response       N/A         evelves velected items and specify reason for declining       Eveleves       Reason For Declining *         192-13@eclsys.com       X       recipient no longer required.       Image: Note Sectors	arral       Overview       CDA       Report       Analyze Report         et v       Export       Import       Ø Mass update       Q       ¥ Filters         19 envires       Export       Import       Ø Mass update       Q       ¥ Filters         19 envires       Export       Import       Ø Mass update       Approving Status       Supplementary Status         send Supplementary Form       Last Updated       Date Responded       Responded       N/A       N/A         yin 28, 2023       Jun 28, 2023       Jun 28, 2023       Responded, not leveed       N/A       N/A         yin 28, 2023       Jun 28, 2023       Sent. no response       N/A       N/A         2023@exclystom       Jun 28, 2023       Sent. no response       N/A       N/A         2023@exclystom       Jun 28, 2023       Sent. no response       N/A       N/A         2023@exclystom       Jun 28, 2023       Sent. no response       N/A       N/A         2023@exclystom       Jun 28, 2023       Sent. no response       N/A       N/A         exclested items and specify reason for declining       Exclester       Reason For Declining *       Exclester items         1243@exclsys.com       ¥       recipient no longer required.       Exclester ite	action       CDA       Report       Analyze Report         etc       ▲ Export       ▲ Import       A Mass update       Import       C Mass update       Import       Import       Import       A malyze Report       Import       Import       A Mass update       Import       I

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

2000	wing to end tes out of 12						2000	Leu i ciules
	Recipient 🖨	Last Updated 🛊	Date Responded 🗘	Response Status	Approving Status	Supplementary Status	Files	Actions

0

• 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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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.

NTERACTIVE			eFeasibility v		Version 1.0 Page 144 of 197			
		А	В	С	D	E	F	
	1	Title	monitoring test123					
	2	Type	1 One question					
	3	Sponsor						
	4	Study						
	5	Comment						
	6							
		Recipient\Submitt						
	7	er	Submitted date	IP	Country	City	FIRST QUESTION	
	8	vkar@tra	6/28/2023	114.143.159.74, 172.31.23	India		Answer is 2	
	9	ter+33@	6/23/2023	114.143.159.74, 172.31.24	India		1234	
	0	ter@ecis	3/22/2022	176.98.73.164, 172.31.240	Ukraine	Cherkasy	123	
	11	e@trans	6/22/2023	114.143.159.74, 172.31.24	India		12344	
	12	e@trans	6/23/2023	114.143.159.74, 172.31.24	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 Reprint departies on 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	A	В	C	D	E	F
1	Title	monitoring test123				
2	Туре	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.con	n	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

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.

#### 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.

Recipients:	Email Configuration
g+submitterillerings.com	Them series deferred. NO_REPLY  Pers shared selection NO_REPLY  Pers shared selection No_REPLY  Pers shared selection Nome descaling desetonmain request Exam Text  Pers to the selection of th
	Cancel Add attachment Send

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



#### 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.



#### 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.



# 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.

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

General	Overview	CDA	Report	Analyze Report
Select 🗸	Selected	Items 🗸	📑 Mana	ge 🕹 Export all
Showing 1 entries	s out of 1			

CDA provides the following functionalities:

- <u>Creating CDA</u>
- Enabling Digital Signature for CDA
- Enabling DocuSign for CDA

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

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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.

Confidential	ity Agreement Setting	(S	
	Main Settings		
General	Agreement Template		
E-Signature	File:*	● Upload file	
Verification	Send CDA		
	Send CDA to only those	e recipients where CDA is not on file	
	Agreement Submission F	age Text	
	Description:	Page for collecting CDA from the recipient	
	Initial instructions:	Please download, sign and submit a confidentiality agreement. Template of the agreement is available for download in this section.	,
	Upload related text:	Once signed and scanned, the confidentiality agreement can be submitted in this section.	11
	Consent text:	By checking below, I acknowledge that I have read and understood the content of the confidentiality agreement. I agree with the content and confirm that the confidentiality agreement I am about to submit has been signed by me.	*
	Signature option related text:	Please choose option for signing.	11
		Cancel Next	

- 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



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. ٠

I A L ACTIVE	eFeasibility v2.6 – Manager User Guide	Ver Pag	rsion 1.0 ge 152 of 197
Confidentiality Agree	ment		
	Please download, sign and submit a confidentiality agreement. Template of the agreement is available for download in this section.		
	Agreement File		
	Agreement File		
	Change the agreement text		
	Please choose option for signing.		
	Sign Electronically	~	
	Sign Sign Via SSO		
	Sign with Wet Ink	~	
	Decline Submit		

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.

Verification In Progress	Page Content
Description:	Notification page for recipient, that his CDA is in progress
CDA verification header text:	Verification in progress
CDA verification in progress message text:	Verification in progress
	Preview

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

	Verification in progres
Verification	n progress
If you have a	iny questions about the questionnaire or Trial Interactive please
visit us at	www.trialinteractive.com
e-mail us at	help@trialinteractive.com

- 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. <u>Digital Signature</u>: This signature is enabled by default for the e-signature process.
  - <u>DocuSign</u>: To enable this signature, you need to configure the DocuSign in <u>Settings->E-Signature</u>.
- 4. The Cancel, Previous and Next buttons.

Confidentia	lity Agreement	Settings				
	Main Settings	Additional CDA Settings	General Settings	Signed CDA Reply	Manage Signers	Notification for Signers
General	Please select th	e type of -e-signature that y	rou would like			
E-Signature	Digital Signat	ure (Default)				
Verification	O DocuSign					
				_		
			Canc	el Previous	Next	

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.

Confidential	ity Agreement	Settings				
	Main Settings	Additional CDA Settings	General Settings	Signed CDA Reply	Manage Signers	Notification for Signers
	Include Manag	ers in to countersigning proc	ess for CDA			
	Yes  No					
Verification	Allow user to vi	iew the survey while sponsor	r is in the process of s	igning the CDA		
	• Yes					
			Cance	Previous	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.

Confidential	ty Agreement Settings
	Main Settings Approved Email Rejected Email Manage Approvers Review email template
General	Approved Email Template
E-Signature	Description: Notification email text to the recipients, that his CDA was approved
Verification	Subject: ODA was accepted
	Normal - ਜ- <u>A</u> - B / 빌 듣 x₂ <sup>,</sup> 샤 프 판 푼 푼 표 중 co.qb
	Hello, Your CDA was approved, for continue working with survey, please <u>use this link</u> Thank you for your participation! Sincerey, Trial Interactive Team
	Cancel Previous 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.

Confidential	ty Agreement Settings
	Main Settings Additional CDA Settings General Settings Signed CDA Reply Manage Signers Notification for Signers
General	Signed reply Email Template
E-Signature	Description: Email notification template about signed CDA with attached copy
Marthan	Subject: Your signed copy of the agreement!
vernication	Normal · ਜ·∆·B/ ⊻ 듣 듣 ½, ᢞ 强 噽 톺 포 盄 용 co.qb ๕ ー ⇔ O
	Dear \$(recipientEmail). Confidentiality agreement has been signed by both parties. A copy of the signed agreement is attached to this email. If you would like to access the survey, it is still available at this [m/s] We recommend using Internet Explorer 10 or above, Chrome of Frefox browsers for viewing. If you have any questions about this file or Trial Interactive please visit us at <u>www.trialinteractive.com</u> or e-mail us at <u>help@trialinteractive.com</u> Thank you for your participation! Sincerely. Trial Interactive Team
	Cancel Previous 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.

Confidential	lity Agreement Settings Main Settings Additional CDA Settings General Settings Signed CDA Ri	ply Manage Signers Notification for Signers	
General	Main Settings Additional CDA Settings General Settings Signed CDA Re	ply Manage Signers Notification for Signers	
General	Manago Signore		
	Manage signers		
E-Signature	Available Signers	Selected Signers	
Verification	Search	Search	
	ovasilenko+testIAM@ecisys.com	qa+manager⊛ecisys.com	×
	qa+manager@ecisys.com		
	qa+publisher@ecisys.com	qa+publisher@ecisys.com	
		÷	

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 <u>default template</u> body for the email.
- 4. The Cancel, Previous and Next button.
- 5. Click Next.

Confidentiality Agreeme
Main Settings
General Signers notifi
E-Signature
Verification
Hello, Dear Sjsend If you would 1 We recomme If you have a Thank you for Sincerely, Trial Interacti

#### 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.

	/Ë	eFeasibility v2.6 – Manager User Guide	Version 1.0 Page 160 of 197
Confidentia	lity Agreement Se	ettings	
	Main Settings		
General			
E-Signature			
Verification		Manual verification is <b>Disabled</b>	
		Would you like to Enable manual verification of the agreement?	
		Cancel Previous Finish	

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.

Confidentiality Agree	ment
	Please download, sign and submit a confidentiality agreement. Template of the agreement is available for download in this section.
	Agreement File
	Agreement File
	Change the agreement text
	Please choose option for signing.
	Sign Electronically
	Sign Sign Via SSO
	Sign with Wet Ink
	Decline Submit

- 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.
- 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.
- 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.

Signature De	etails			I
First name*				
Sneha				
Last name*				
Jagavkar				
Email*				
sneha	ct.com		_	
Role *			Pers	ion's role in their anization. For example:
Sub Principal Inve	stigator		Prin	
Reason for signat	ure*			
Accepted.				

#### 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.

User Verification
Email*
Email
Password*
Password
Cancel Sign
Register as new user Forgot password?

$\sim$	Т	R		Δ	
$\mathbf{Y}_{\mathbf{z}}$	-i's i	ᅮᇆ	<u>ہ</u> ג ר	$\sim \div$ iv	
- (2)		IEF	۲A	~ I I \	VE

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Cancel Submit

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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.
	User Sign Up
	<b>Q</b> Details
	Itername / Email * ⑦

amruta.deshpande83@gmail.com

First Name \* ③ Amruta Last Name \* ③ Deshpande Phone ⑦ 978645231 Password \* ①

Confirm Password

I agree to the terms and conditions

**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

2	Linon cuccoccful	rogistration	ucor rocoivor	adenovulade	romont like	chown h	0000
э.	Opon succession	registration,	user receives	acknowleus	септени пке	SHOWIED	eiow



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.

C INTER	ACTIVE	eFeasibility v2.6 – Manager User Guide	Version 1.0 Page 164 of 197
	Accoul Your account has Finish	nt Activation Successful s been successfully activated.	

# 16.3.2 Password Reset for eSignature

ſ

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.

Reset Use	er Password
Email: *	
amruta.deshpande83@gmail.com	
A message will be sent to that addres password.	ss containing a link to reset your
Cancel	Send

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

-	noreply@trialinteractive.net to me -
	Hi, a password reset was request for amruta.deshpande83@gmail.com.
	In order to complete this request, you need to visit this link.
	If you did not request this reset, just ignore the present e-mail.
	Best regards.

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

Password	0
	٩
Confirm P	assword *
	4

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.

	Password was successfully updated Use your new password to sign in services
	Password Reset successful $\Sigma$ Inbox ×
*	noreply@trialinteractive.net to me *
	Hi, we are happy to inform you that the password request was successfully executed for your account Best regards.

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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.

Confidential	Confidentiality Agreement Settings						
	Main Settings Additional CDA Settings DocuSign Settings						
General	Please select the type of -e-signature that you would like						
E-Signature	O bigital Signature (Default)						
Verification	<b>Docusión</b>						
	Cancel Previous Next						

- 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.

$\sim$	TRIAL	
6	INTERACTIVE	

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		11101000	obel ourae	

					•	
onfidential	ity Agreement	t Settings				
	Main Settings	Additional CDA Settings	DocuSign Settings			
General	Include Manage	ers in to countersigning proc	ess for CDA			
E-Signature	• Yes					
Verification	Allow user to vi	iew the survey while sponsor	r is in the process of signing the CDA			
	● Yes ○ No					
			Cancel Previous	Next		

- 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.

Confidentia	ity Agreement Settings
	Main Settings Additional CDA Settings DocuSign Settings
General	Approver email: *
E-Signature	aneha. Diease, enter a valid Approver email.
Verification	Ins should be the email of the application user with the manager access      Subject *
	CDA DocuSign signature needed
	Cancel Previous Next

- 5. Click Next to take you to the Manual Verification Page.
- 6. Click Finish. You are redirected to the Customize your DocuSign template page.



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

ustomize your DocuSign templat	ie		_	
Test demo01 06-23-2023		⑦ ACT		PREVIEW
I signer I I I I I I I I I I I I I I I I I I I	ש 🖒 בי 🗗 🗇 ונפאל די			SHORTCUTS
Standard Fields X Standard Fields Standard Fields Standard Fields Standard Fields District a Date Signed Name Email	The document is proprietary and is proported by U.S. and international superight lines and read-moves laws. Copyright 9 2017. The document is proprietary and is proported by U.S. and international superight lines and read-moves laws. Copyright 9 2017.		Signature Recipient signer Required Formatting Data Label Tooltip	Field
Company	adapted, molified, discributed, transferred, translated, disclosed, displayed or otherwise used by answers in any form or by any means without the acyeons white antibiarition of a TransPerfect Senior Management and/or Probast Management. Other names may be trademarks of their respective owners.		SAVE AS CU	JSTOM FIELD
		ВАСК	SAVE A	ND CLOSE
English (US)  Contact Us   Terms of Use   Privacy	Intellectual Property   Trust Copyright © 2023 Docudign, Inc. All rights reserved			

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.

Adopt Your Signature	
Confirm your name, initials, and signature.	
Required	
Full Name*	Initials*
amaddel@transperfect.com	AM
amaddel otransperfect.com	Change St

#### 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.

T R I A L INTERACTIVE	eFeasibility v2.6 – Manager User Guide	Version 1.0 Page 170 of 197
Sections     Sections     COA Sign	nfi 🕜 tialty Agfeement	
General Supporting Documentation	Please download, sign and submit a confidentiality agreement. Template of the agreement is available for download	d in this section.
	Agreement File	
	Agreement File	
	•	
	Change the agreement text	
	Please choose option for signing,	
	Sign Electronically	*
	Sign with Wet Ink	-
	Once signed and scanned, the confidentiality agreement can be submitted in this section.	
	Upload file *	
	By checking below, I acknowledge that I have read and understood the content of the confidentiality agreement. I ag confidentiality agreement I am about to submit has been signed by me.	gree with the content and confirm that the
	Decline Submit	

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

Sign with Wet Ink	-
Once signed and scanned, the confidentiality agreement can be submitted in this section.	
Inspiron-5518-setup-and-specifications-en-us.pdf	
By checking below, I acknowledge that I have read and understood the content of the confidentiality agreement. I agree with the content confidentiality agreement I am about to submit has been signed by me.	t and confirm that the
Decline Submit	

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.

Confidentiali	ty Agreement	Settings	
	Main Settings	Approved Email	Rejected Email Manage Approvers Review email template
General			
E-Signature			
Verification			Manual verification is Enabled
			Would you like to Disable manual verification of the agreement?
			Disable
			Cancel Previous Next

#### 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.

T R I INTERAC	A L CTIVE	eFeasibility v2.6 – Manager User Guide	Version 1.0 Page 172 of 197
Con	nfidentiality Agreer	nent Settings	
	Main Setti	ngs Approved Email Rejected Email Manage Approvers Review email template	
Ge	General Approved	Email Template	
E-Sig	ilgnature	Description: Notification email text to the recipients, that his CDA was approved	
Veri	rification	Subject: CDA was accepted	
	Normal	- 沂·Δ·Β / 単語語 x₂ x² 運動 副副 子 co qò < ー ◇ O O	
	Hello,	was anorough for continue working with survey places use this link	
	Thank yo	I for your participation!	
	Sincerely Trial Inter	active Team	
		Cancel Previous Next	

#### 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.

	L E eFeasibility v2.6 – Manager User Guide	Version 1.0 Page 173 of 197
Confidential General E-Signature Verification	y Agreement Settings Main Settings Approved Email Rejected Email Manage Approvers Review email template Rejected Email Template Description: Notification email text to the recipients, that his CDA was rejected Subject: CDA was rejected Normal → IT ☆ B / U II I	
	Cancel Previous Next	

#### 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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	Main Settings Approved Email Rejected Email	Manage Approvers Review email template	
General	Manage Approvers		
E-Signature	Available Approvers	Selected Approvers	
	Search	Search	
	rada galansperietation		
	atahim@transperfect.com	qa+manager@ecisys.com	×
	qa+manager@ecisys.com		
	jasmith@transperfect.com		
	qa+publisher@ecisys.com	aa+publisher@ecisys.com	
	njirapure@transperfect.com		
	nupadhyay@transperfect.com		
	testingstage@test.com		
	skhandkar@transperfect.com		
	SandboxManager2@ti.com		
	dmasare@transperfect.com		
	ethabur@transnarfact.com		

#### 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.

T R I A L INTERACTIVE	eFeasibility v2.6 – Manager User Guide	Version 1.0 Page 175 of 197
Confidentiality Ag General Rev E-Signature Verification De Sign Sign Sign Sign Sign Sign Sign Sign	reement Settings         Settings       Approved Email       Rejected Email       Manage Approvers       Review email template <ul></ul>	
	Cancel Previous Finish	



#### 16.7 Viewing CDA

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

☆ 123 O Set Due Date			🐗 Send
General Overview CDA Report Analyze Report			
Select 🗸 Selected Items 🗸 📾 Manage 🔺 Export all		C Tilters	<u>a</u> m
Search Email: Q Search	Status: All		4 (5)
Showing 1 entries out of 1		Selected 0 entries	Ve 100
Recipient	Status	Actions	
alinavictorovnapr@gmail.com	Signature Needed		
Show 10 V		Table View Detailed View	C1 (102%)
			Signed In Review
			Rejected Pending Verification Signature Needed

#### 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.

T	RI	А	L
$\mathcal{T}_{\mathcal{O}}$	VTERA	CTI\	/Ē

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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.

General Overview CDA Report Analyze Report		
Select 🗸 Selected Items 🗸 📰 Manage 🎿 Export all		Filters
howing 1 entries out of 1		Selected 0 entries
Recipient	Status	Actions
alinavictorovnapr@gmail.com	Signature Needed	

#### 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:

☆ monitoring test123 ② Set Due Date				A Send
General Overview CDA Report Analyze Report				
Select V Selected Items V Manage A Export all Showing 3 emores out of 3			Selected 0 entries	»
Recipient mkandhare-®transperfect.com	Status	Actions		1.03%
sneha.jagavkar@transperfect.com	Signature Needed			0.055
sneha jagavkar⊜transperfect.com	In Review	<u>ه</u> ۳ و		• cov
Show 10 ·		I	Table View Detailed View	Signed In Review Rejected Pending Verification Signature Needed

A L eFeasibility v2.6 – Manager User Guide	Version 1.0 Page 178 of 197
Sign CDA	
Signature Details	
First name*	
Sneha	
Last name*	
Jagavkar Person exa	's role in their organization. For mple: 'Principal investigator'
Role* Sub-Principal Investigator	- B
Reason for signature*	
Signature is needed.	~
	_
User Verification	
Email*	-
Cancel Sign	

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

☆ monitoring test123 ◎ Set Due Date				🗐 Send
General Overview CDA Report Analyze Report				
Select 🗸 Selected Items 🗸 📓 Manage 🔺 Export all			C T Filters	»
Showing 3 entries out of 3			Selected 0 entries	
Recipient	Status	Actions		1 029-
mkandhare@transperfect.com	Signed	Sign GDA		
sneha jagavkar@transperfect.com		• 🚱 🗹		
sneha.jagavkar@transperfect.com	In Review	👁 🔽 🗗 🖻		a (55)
				UI GIN
Show to M			Table View Detailed View	
				Signed
				Rejected
				Pending Verification
				Signature Needed

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TI_UserGuides-Template.docx			
P     *     *     Pope	Advanced: Tools 1	Compare & 2011 Transformer, manual and a series	ature Details ranne* ha ranne* hka * * * * * * * * * * * * * * * * * * *
	ACTIVE Document Title	Version X Page 3 of XXX	Family and the second s
			Syn

# 16.8.3 Export CDA

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

General	Overview	CDA	Report	Analyze Report		
Select 🗸	Selected	ltems 🗸	📰 Mana	age 🕹 Export all		
Showing 1 entrie	s out of 1					
Rec	ipient				Status	Actions
qa	2+00@ecisys.co	om			Signed	۵ 📩

# 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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☆ 123 Ø Set Due Date				🛛 🗐 Send
General Overview C	DA Report Analyze Report			
Select Selected Item Showing 1 entries out of 1 Recipient	is 🗸 📾 Manage 🛓 Export all	Status	Selected 0 entries Actions	> 0 (00) 0 (00)
alinavictorovnapr@gma Show 10 ∽	il.com	Signature Needed Table	View Detailed Vie	W CI (TOON
				Signed In Review Rejected Signature Needed

- 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.

Name Template:	Prev	ime
		-
Available Components:	Words Delimiter: Underscore	
CDA status Recipient email CDA fil	e name Date of CDA adding Type of published form Survey title	

- 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.
| T R<br>1NTER | ACTIVE                                  | asibility v2.6 – Manage     | r User Guide | Version 1.0<br>Page 181 of 197 |
|--------------|---|-----------------------------|--------------|--------------------------------|
|              | CDA file name template                  |                             |              |                                |
|              | Name Template:                          |                             | Preview      |                                |
|              | CDA status Type of published form       |                             |              |                                |
|              |   |                             |              |                                |
|              | (                                       | Survite title               |              |                                |
|              | Available Components:                   | Words Delimiter: Underscore | ~            |                                |
|              | Recipient email CDA file name Date of C | DA adding                   |              |                                |
|              |   |                             |              |                                |
|              |   |                             |              |                                |
|              |   | Cancel Export               |              |                                |

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.

CDA file name template		
Name Template:		Preview
Available Components: Recipient email CDA file name Date of CDA adding	Words Delimiter: Underscore	~
Cancel	Export	

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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	CDA file name template	
	Name Template:	
	Signature Needed, Rater Questionnaire_123	
	Available Components: Words Delimiter: Underscore	
	Recipient email CDA file name Date of CDA adding	
	Cancel Export	

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:

Words Delimiter:	Underscore	~
	Underscore Whitespacë Dash	

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

CDA file name template	
Name Template:	Edit template
123_Signature Needed_Thu, 02 Jun 2:45:24 UTC 2022	]
Available Components:	Words Delimiter: Underscore 🗸
Recipient email Type of published form CDA file name	me
Cancel	Export

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CDA file name template	
Name Template:	Edit template
123 Signature Needed Wed, 01 Jun 15:45:24 UTC 2022	2
Available Components:	Words Delimiter: Whitespace 🗸
Recipient email Type of published form CDA file na	me
Cancel	Export

CDA file name template	
Name Template:	Edit template
123-Signature Needed-Thu, 02 Jun 8:15:24 UTC 2022	
Available Components: Words Delimiter:	Dash 🗸
Recipient email Type of published form CDA file name	
Cancel Export	

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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.

CDA file name template	
Name Template:	Preview
Survey title Recipient email CDA file name	
Available Components: Words Delimiter: Underscon	re v
CDA status Type of published form Date of CDA adding	
Cancel Export	

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

Background John	
Background Jobs	
Export CDA	×
Status: 100%	Completed
Start date: 1 minute ago	
Completed date: 1 minute ago	
total: 1 failed: 0 succeed: 1	
Download document 📥	
Send Form Emails	×
Status: 100%	Completed
Start date: 5 hours 16 minutes ago	
Completed date: 5 hours 16 minutes ago	
total: 2 failed: 0 succeed: 2	
Send Form Emails	×
Status: 100%	Completed
Start date: 5 hours 17 minutes ago	
Close	

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 loon 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

C	NTERACTIVE 🕈 qa24 🗸					Č,	a+manager@ecisy
* +	Analytics Project Activity						
<b>B</b>	Showing 4 entries out of 4						Q Search T Selected entries
· ·	Recipient Email	Date responded	Score	Blockers	Attachments	FIRST QUESTION	[Contact] d
	qa+submitter+33@ecisys.com	Jun 23, 2023	0	No	No	1234	
88	qa+submitter@ecisys.com	Mar 22, 2022	0	No	No	123	
	mkandhare@transperfect.com	Jun 22, 2023	0	No	No	12344	
<b>6</b> 8	mkandhare@transperfect.com	Jun 23, 2023	0	No	No	12345	
	Show 10 ¥						c

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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.

ing 4 entries out of 4	-						Selec
	Published Form Sear	ch					citatel a
qa+submitter@ecisys.com mkandhare@transperfect.com		Q.Search	Choose form type	♥ Date Created:	100 to:		
mkandhare@transperfect.com	Showing 10 entries out of 41 Title	Study Name	Organization	Type	Created By	Date Created	
W 10 ¥	monitoring test123			1 One question	qa+manager@ecisys.com	Mar 22, 2022	
	Tidemo231			Multiple Choice	qa+manager@ecisys.com	Jun 23, 2023	
	Analysts001			empty	qa+manager@ecisys.com	Jun 23, 2023	
	23			1 One question	qa+manager@ecisys.com	Mar 24, 2021	
	Type002			1 One question	qa+manager@ecisys.com	Jun 19, 2023	
	hh			1 One question	qa+manager@ecisys.com	May 10, 2023	
	11			1 One question	qa+manager@ecisys.com	May 12, 2023	
	rec form test			1 One question	qa+manager@ecisys.com	May 4, 2023	
	new al			1 One question	qa+manager@ecisys.com	May 20, 2022	
	EF-2.5.1			Rater Questionnaire	qa+manager@ecisys.com	May 19, 2022	
	them at a			# / 1 3 3 / 5 N			

- 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.

$\sim$	Т	R	Т	А	L
$\mathcal{O}$	IN	TEF	RA	CTIV	√E

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Select Form Selected form : monitoring to	est123					
wing 4 entries out of 4				[		Q Search
Recipient Email	Date responded	6 Score	Blockers	Attachments	FIRST QUESTION	🕑 [Contact] d
qa+submitter+33@ecisys.com	Jun 23, 2023	0	No	No	1234	
qa+submitter@ecisys.com	Mar 22, 2022	0	No	No	123	
mkandhare@transperfect.com	Jun 22, 2023	0	No	No	12344	
mkandhare@transperfect.com	lun 23. 2023	0	No	No	12345	

Each of these are discussed in subsequent sections.

		Show	10	~	
1.	Select the option form the Show				dropdown from the bottom left corner of table to
	manage the list of Form entries ir	n the ta	ble.		

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 Torm to contact the form 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.

4	A		В	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@ecis	sys.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@trans	perfect.com	Jun 23 2023 08:48:41 Greenwich Mean Time	0	false		12345	

#### 17.1.2 Report Configuration



Clicking the Gear Clicking 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 <u>Settings-Contact</u> <u>Settings</u>.
- 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.

	Report Co	onfiguration	
ailable Columns		Visible Columns	
	Q Search	Recipient Email	Metadata
	Quanta	Date responded	Metadata
ontact] First Name	Contact Field	Score	Metadata
ontact] Last Name	Contact Field	Blockers	Metadata
ontact] Role	Contact Field	Attachments	Metadata
ontact] Organization	Contact Field	FIRST QUESTION	Question
ontact] Phone	Contect Field	[Contact] d	Contact Field
ontact] P	Contact Reld		
iontact] n	Contact Field		
ontact] S	Contact Field		
ontact] Domain	Contect Field		
iontact] J	Contact Field		



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.

		Report C	onfiguration	
vailable Columns			Visible Columns	
		Oferet	Recipient Email	Metadata
		Quearch	Date responded	Metadata
[Contact] First Name		Contact Field	Score	Metadata
[Contact] Last Name		Contact Field	Blockers	Metadata
[Contact] Role		Contact Field	Attachments	Metadata
[Contact] Organization		Contact Field	FIRST QUESTION	Question
(Contact) Phone	Drag and Drop	Contact Field	[Contact] d	Contact Field
[Contact] P	right panel	Contact Field		
(Contact) S		Contact Dald		
	[Contact] n	÷.	Contact Field	
[Contact] Domain		Contact Field		
[Contact] J		Contact Field		

#### 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.

Available Columns			
		<b>Q</b> Search	
Location		Custom Note 🖋 🗙	
[Contact] First Name		Contact Field	
[Contact] Last Name		Contact Field	
[Contact] Role		Contact Field	
[Contact] Organizatio	1	Contact Field	
[Contact] Phone		Contact Field	
[Contact] P		Contact Field	
[Contact] n		Contact Field	
[Contact] S		Contact Field	
[Contact] Domain		Contact Field	
[Contact] J		Contact Field	

#### 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.

Add	Formula	~	+

- 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.

	eFeasibility v2.6 – Manager User Guide	Version 1.0 Page 191 of 197
Formula Editor for: Add		
	Q Search 0 = ≠ > < 2 5 + -	× ÷ lal ( ) Clear
Column Name	- Custom value:	Add
Recipient Email		
Date responded	Recipient Email <sup>96</sup>	
Blockers		
Attachments		
FIRST QUESTION		
[Contact] First Name		
[Contact] d		
[Contact] Last Name		
[Contact] Role		
[Contact] Organization		
[Contact] Phone	•	
	Cancel Apply	

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.

	Q Search $0 = \neq > < \ge \leq + - \times \div$ lal (	)
Column Name	Drag column name to area and choose math operation.Example:1) 'Column Name'+' Math Action '+Column Name'	
ocation	Custom value:	
Recipient Email		Add
Date responded		
Score	Location <sup>®</sup> [Contact] Organization <sup>®</sup> 1	
Blockers		
Attachments		
FIRST QUESTION		
(Contact] First Name		
[Contact] d		
(Contact] Last Name		
Contact] Role		
Contact] Organization		
Contact] Phone	Ψ.	

4. Create formula for the question using the functions.

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

I A L ACTIVE	eFeasibility	v2.6 – Manager Us	ser Guide	Version 1.0 Page 192 of 197
Symbol	Function	Symbol	Function	
=	Equal to (==)	+	Add	
¥	Not Equal to (! =)	—	Minus	
V	Greater than	×	Multiply	
<	Smaller than	÷	Divide	
2	Greater than equal to	lal	Percentage %	,
5	Smaller than equal to	()	(your condition You can defin your own conditions in formula.	on). e the

- 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.



Ge	neral	Overview	CDA	Report	Analyze Report								
	•										mkan	X Q Search	٣
Showi	ng 2 entries	out of 2										Selected entries	-
	🕈 😡 R e	cipient Email				Date responded	score	Blockers	Attachments	FIRS	T QUESTION	🛛 [Contact] d	
	mkand	×	com	-		Jun 22, 2023	0	No	No	12344			
	mkand	N	com			Jun 23, 2023	0	No	No	12345			

#### 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.

	0						Q Search
Showin	◆      Recipient Email	Date responded	Score	Blockers	Attachments	FIRST QUESTION	Gelected entries
×	mkandhare 🗙	Jun 22, 2023 🕱		Al v			
	mkandhare@ com	Jun 22, 2023	0	No	No	12344	
	mkandhare@com	Jun 23, 2023	0	No	No	12345	

### 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.

				Change Cilingue			
м		liter		Show Hitters	v n	100	
						100	
ld♠	User	Date	Time	Activity	Old Value	New Value	
16900020	admin	Jun 30, 2023	21:29:57	Save as PDF Form: Type782			
16900019	qa+manager@ecisys.com	Jun 30, 2023	21:29:35	updateNodeProperties			
16900006	qa+manager@ecisys.com	jun 30, 2023	21:29:21	updateNodeProperties		"(Sent Dates-(Fri Jun 30 11:59: 2023), Sent Date-Fri Jun 30 11: 2023)"	11 EDT 59:21 EDT
16902003	qa+manager@ecitys.com	jun 30, 2023	21:29:21	Send new survey		"(Is Display Confirmation-true, Email-ND, REPL/IQITalianteracti Form Title-Supplementary fore Categories-Idles, Sporneen, Pe Email-seneta jagankantifitouropp Instructions-, Form Type+1 On Study Name+)"	Sender ve.com, n, Is Public cipient erfect.com, e question,
16900002	qa+manager@ecisys.com	Jun 30, 2023	21:29:21	Update form data			
16899991	qa+manager@ecisys.com	jun 30, 2023	21:29:13	updateNodeProperties		"(Sent Dates-(Fri Jun 30 11:59: 2023), Sent Date-Fri Jun 30 11: 2023)	13 EDT 59:13 EDT
16899988	qa+manager⊜ecisys.com	jun 30, 2023	21:29:13	Send new survey		"(Is Display Confirmation=true, Email=NO_REPLVBtrialinteracti Form Title=Supplementary for Categories=Lake. Sportsore. Re	Sender we.com, n, Is Public cipient

#### 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.

Analytics	Project Activity					
			Show Fi	lters 🗸		
Id [1690001	9-1 🗙 🗸 User	~	Date	✓ ■	100	<b>X</b> ~
ld♠	User	Date	Time	Activity	Old Value	New Value
16900020	admin	Jun 30, 2023	21:29:57	Save as PDF Form: Type782		
16900019	qa+manager@ecisys.com	Jun 30, 2023	21:29:35	updateNodeProperties		

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

Analytics	Project Activ	ity										
						Show Filters 🗸						
Id [1690001	9-1	<b>x</b> ~	User: admin	<b>x</b> ~	Date	~	Ľ	)		100		<b>x</b> ~
			admin	×								
ld♠	User	Date		nme		Activity			Old Value		New Value	
16900020	admin	Jun 30, 3	2023	21:29:57		Save as PDF Form: Type782						

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

T R I INTERA	A CT	IVE	(	eFeasibility v2	.6 – M	anage	er User	Guide	Versior Page 19	1.0 95 of 197	
	Analytics	Project Activity	_								
			Show Filters 🗸								
le	d [16900019	41	× Vse	er 🗸	Date [06/29/20	23-06/30/2023	×~ D		100		<b>X</b> ~
					Date from: (	06/29/2023					
	ld <b>↑</b>	User		Date	Date to:	6/20/2022	У		Old Value	New Value	
1	16900020	admin		Jun 30, 2023		101 301 2023	3s PDF Form	: Type782			
1	16900019	qa+manager@ecisys.	com	Jun 30, 2023	21:29	:35	updateNodeProp	erties			

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.

Analytics	Project Activity										
					51	how Filters					
		<b>x</b> ~	User					<u>b</u>			<b>x</b> ~
				Report parameters							
ld≁	User								Old Value	New Value	
16900020	admin			User:	admin			×			
16900019	qa+manager@ecisys.	.com		Date from:	06/29/2023	,	m				
				Date to:	06/30/2023	,	•				
				Id from:	16900019						
				lid to:	16900020			×			
				Show:	100			×			
							_				
					Cancel	Get Rep	ort				

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

FIL	HC HC	ME INSERT PAGE LAYOUT	FORMULA	IS DATA	REVIEW VIEW														An
Ê	a cut	Calibri + [11	· * *	==	8> 📅 Wap Test	Gener	e	B. 🕸	Normal	Bad	Good	Neutral	Calculati		-	*	∑ AutoSur	- 27	6
Pash	Lop	B Z U - E - 4	- A -	15 15 12	HE HE IEI Marge & Co	enter - S -	5 . 12.2	Conditional Format a	three cell	Explonatory	Input		Note		Insert 0	elete Format	Gera.	Sot & Fr	ind fk
1.0	· 1010	ut ranter						Formatting * Table *							1.1		S. Can.	Filter + Se	slect *
	Criptoan	1 is Fore			Asprinert		sunori 14				pes .					LARS		toting	
81		<ul> <li>I × √ fx User</li> </ul>																	
	4.1	1		0				4		6	н	1	1 .	1.04		N	0	¥ 1 4	
x h		Der	Date	Time Ar	1MIN		Old Value		New Value										-
2	2648520	orhakrahostulltranspartart com	25-Dec.17	11-12-12-12	adata form data														
3	2649551	or hakraborty Etransperfect com	29.0ec.12	10-12-44 10	state form data														
4	2649058	ochakrabortvilltransperfect.com	29-Dec-17	93202 ut	viateNodeProperties														
5	2648994	ochakraborty@transperfect.com	29-Dec-17	9:32:40 ut	dateNodeProperties				(Sent Dates of F	1 Dec 29 09:33:40	UTC 20171. Sent	Date+Fri Des	29 09:33:40 UTC 2	017)					
6	2648989	ochakraborty/Ptransperfect.com	29-Dec-17	9:33:40 54	red new survey				(Is Display Con	imation-true, 5	ender Email-NO	REPLYING.C	om, Form Title=Te	HE, IS PUD	ic Categor	ies-false, So	onsor-Orga	vization, Reck	plent Em
7	2648982	ochakraborty@transperfect.com	29-Dec-17	9:33:00 13	adate form data														
8	2648580	ochakrabortvi@transperfect.com	29-Dec-17	9:32:59 U	odate Email Template A	For Form: Test	shomb-head-s	/head-sbody/Hello	<head><td>-bodyHello.</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></head>	-bodyHello.									
0	2648978	ochakraborty@transperfect.com	29-Dec-17	9:32.59 U	odate Email Template I	for Form: Test	chnwl)-chead>c	/head>-body>Dear	chead>c/head	-body:Oear									
10	2648976	ochakraborty@transperfect.com	29-Dec-17	9:32:58 U	odate Email Template R	For Form: Test	danb		chead> <td>-body&gt;Hello,</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	-body>Hello,									
11	2648974	pchakraborty@transperfect.com	29-Dec-17	9:32:58 U	odate form data														
12	2648747	pchakraborty@transperfect.com	29-Dec-17	8,54,34 up	dateNodeProperties				(Sent Dates-(F	1 Dec 25 08:54:34	UTC 2017L Sent	Date=Fri Dec	29 08:54:34 UTC 2	0171					
13	2648742	pchakraborty@transperfect.com	29-Dec-17	8:54:34 54	end new survey				(Is Display Con	Imationstrue, S	ender Email+NC	REPLY BU.C	om, Form TitlesH	idden, Is P	ublic Cate	poriestalse	Sponsons, P	ecipient Ema	alramad
14	2648737	pchakraborty@transperfect.com	29-Dec-17	8:54:29 U	odate Email Template I	For Form: Hidd	shead>	<body hello,<="" td=""><td><head><td>-bodymello,</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></head></td></body>	<head><td>-bodymello,</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></head>	-bodymello,									
15	2648719	pchakraborty@transperfect.com	29-Dec-17	8:53:32 Re	estrict to send a survey	to a recipient		TRUE		FALSE									
16	2645696	pchakraborty@transperfect.com	29-Dec-17	7 8:53:18 U	odate Email Template I	for Form: Choi	chesd>(head>	<body hello,<="" td=""><td>chead&gt;<td>-bodyHello,</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></td></body>	chead> <td>-bodyHello,</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	-bodyHello,									
17	2648636	pchakraborty@transperfect.com	29-Dec-17	8:50:42 Up	odate Template: defaui	it-form-alread	damb		<head><td>-body&gt;Dear</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></head>	-body>Dear									
18	2648565	pchakraborty@transperfect.com	29-Dec-17	6:07:41 Vi	ew form response det.	ails: Test			amaddel@tran	sperfect.com									
19	2648468	pchakraborty@transperfect.com	29-Dec-17	5:32:16 up	odateNodeProperties														
20	2648467	pchakraborty@transperfect.com	29-Dec-17	5:32:16 U	odate contact custom fi	ields on site: b	[["changedValu	es":["\"title\":\"Wi	ork [["changedVal	es"["\"title\"]	"Work Domain"	1."position"/	.3.]]						
21	2648465	pchakraborty@transperfect.com	29-Dec-17	5:32:11 up	odateNodeProperties														
22	2645464	pchakraborty@transperfect.com	29-Dec-17	5:32:11 U	odate contact custom f	ields on site: b	[["changedValu	es":{"\"title\":\"Wi	ork [["changedVal	es":["\"title\": \	"Work Domain."	"],"position":	*s*)]						
23	2648462	pchakraborty@transperfect.com	29-Dec-17	5:30:32 up	odateNodeProperties														
24	2648461	pchakraborty@transperfect.com	29-Dec-17	5:30:32 U	odate contact custom f	ields on site: b	[["changedValu	es":{"\"title\":\"Do	m: [["changedVal	es":["\"EEle\": \	"Work Domain"	],"position":	"3"].["changedVal	Uns":["\"]	/notition/	7.0"],"posit	ion":"58")]		
25	2648459	pchairaborty@transperfect.com	29-Dec-17	5:24:03 up	odateNodeProperties														



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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.

»	☆ monitoring test123 ② Set Due Date
•	General Overview CDA Report Analyze Report
	+ Select Questions 🕹 Export All 📃 A Collapse All
٠	Please, add the questions for analyze
*	
œ	
⊞	

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 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.

eneral Overview CDA Report Analyze Report			
Select Questions     Alt Collapse All			
Years of experience			± 0 x
Bar Donut Column Pie			
Years of experience	PARTICIPANTS	QUANTITY	
	ANSWERED	10	
	SKIPPED	0	
	TOTAL	10	
	ANSWER CHOICES	RESPONSES	
	0-5 Years	6	
	6-10 Years	3	
a i i i i i	6 P 11-15 Years	0	
Total anvery choices 10	More than 15 years	1	
0-5 Years C-10 Years 11-15 Years More than 13 Years	TOTAL	10	
Therapeutic Area			± 0 0 >
Rar Donut Column Pie	PARTICIPANTS	DUANTIN	
merapeutic Area	ANSWERFD		
9.000			

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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.

Site Feasibility Ø Set Due Date			. sl Se
ieneral Overview CDA Report Analyze Report			
+ Select Questions A Export All Collapse All			1
Years of experience			± ox
Bar Donut Column Pie			_
Years of experience	PARTICIPANTS	QUANTITY	
	ANSWERED	10	
	SKIPPED	0	
	TOTAL	10	
see 3	ANSWER CHOICES	RESPONSES	
	0.5 Years	6	
	6-10 Years	3	
	7 11-15 Years	0	
Total answer choices 10	More than 15 Years	1	
C-5 Years C-10 Years II 1-15 Years Kone than 15 Years	TOTAL	10	2
. Therapeutic Area			±0 ×
Bar Donut Column Pie			-
Therapeutic Area	PARTICIPANTS	QUANTITY	
9 100	ANSWERED	8	
0.00	SKIPPED	2	

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

A Description (CD) Research Landson Research			
al overview con Report Analyze Report			
lett Questions All College All			
a of experience			± 0 ×
Donut Column Pie			
Years of experience	PARTICIPANTS	QUANTITY	
	ANSWERED	10	40
	SKIPPED	0	
	TOTAL	10	
	ANSWER CHOICES	RESPONSES	
	0-5 Years		
	6-10 Years	1	
i i i ji i i i i	11-15 Years	8	
Total answer changes 10	More than 15 Years		
C-5 Years E 6-10 Years III 11-15 Years More than 15 Years	TOTAL	10	
apeutic Area			± 0 0 ×
Therapeutic Area	PARTICIPANTS	QUANTITY	
# 0%s	ANSWERED		
9.00V	SAIPPED	2	