



EFEASIBILITY V2.7 - MANAGER USER GUIDE V 0.1





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| Date: | |

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VERSION HISTORY

| Author | Revision | Date | Change History |
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1. About Trial Interactive e-Feasibility

TransPerfect customers have successfully leveraged Trial Interactive in hundreds of clinical trials to store critical trial documents as part of the Electronic Trial Master File (eTMF). Trial Interactive is a web-based, mobileenabled Software-as-a-Service (SaaS) platform offering a suite of eClinical solutions, including eTMF, Electronic Feasibility (E-Feasibility), Content Management, Learning Management, Study Start-Up, Clinical Trial Management, and various other tools essential for clinical trial execution.

The Trial Interactive Platform has the following features:

- Regulatory-Compliant eTMF Archive: A secure, electronic Trial Master File that meets all regulatory, security, access, and storage requirements across all countries and regions.
- Fully Hosted & Compliant Solution: Adheres to 21 CFR Part 11, Annex 11, ERES, GDPR, HIPAA, and GxP regulations.
- Centralized Access to Trial Documentation: Provides a single access point for sponsors and site
 personnel to manage trial content and documentation.
- Comprehensive TMF Workflows: Supports key workflows, including document import and coding, quality review, audit and inspection, document certification, and other clinical trial documentation processes.
- User-Friendly Interface: A thin-client, consumer-grade UI compatible with major browsers, alongside a
 mobile app supporting both iOS and Android devices.
- Flexible Document Management: A configurable document management system for Clinical, Quality, and Regulatory documentation, supporting various review and authoring workflows.
- Integrated Site Identification & Study Start-Up: A suite of tools designed to streamline site identification, feasibility assessment, and study initiation.
- Comprehensive eLearning System: A full-featured eLearning platform designed specifically for GxP compliance training.

The E-Feasibility module within Trial Interactive facilitates the creation, maintenance, retrieval, and distribution of feasibility questionnaire records for clinical studies. It enables Sponsors and CROs to evaluate the feasibility of conducting a clinical trial in a specific geographical region or site.

Trial Interactive provides a comprehensive, regulatory-compliant, and user-friendly solution to support clinical trials at every stage, from feasibility assessment to study completion.

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

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2. GETTING STARTED WITH EFEASIBILITY

To get started with Trial Interactive E-Feasibility, check out the sections below:

- System Requirements
- Accessing eFeasibility
- Credential Recovery
- Logout / Sign out

2.1 System Requirements

| Category | Supported | Restrictions / Not | Recommendations |
|--------------------------|-----------------------|--------------------|-------------------|
| | | Supported | |
| Browsers | Internet Explorer 10, | Internet Explorer | Chrome (for PC), |
| | Internet Explorer 11, | versions < 10 | Firefox (for Mac) |
| | Chrome, Firefox, | | |
| | Opera, Safari. | | |
| Operating Systems | Windows (Vista and | Windows XP and | Windows OS |
| | later versions) | earlier | |
| Additional | Adobe Reader 7.0 or | | |
| Requirements | higher | | |

2.2 Accessing eFeasibility

To login to e-Feasibility platform, follow these steps:

- 1. Use the preferred internet browser and navigate to the E-Feasibility web link.
- 2. Click enter, this will open eFeasibility log in page.
- 3. On the Log In page, enter the Email* and Password*.
- 4. Click the Log In button.

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| Log In | | |
|--------------------|------------------|---------------|
| Email* | | |
| username@gmail.com | | |
| Password* | | |
| | | |
| | | Forgot Passwo |
| | Log in \varTheta | |
| | | |

2.3 Credential Recovery

This involves identity verification steps, such as answering security questions, receiving a reset link via email or using multi-factor authentication to ensure secure account recovery.

Note: Users do not need to contact the Help Desk unless necessary. In most cases, they can perform password reset operations on their own.

To Reset Password, follow these steps:

- 1. From the login page, click the Forgot Password button.
- 2. On the Password Reset page, answer the security questions.
- 3. Enter email address in the Email* field.
- Click the Submit button to send the request. A password reset link will be sent to registered email address.
- 5. Open the email, click the reset link, and follow the on-screen instructions to reset password.

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| Password Reset | |
|---|---------|
| Email* | |
| | |
| What was the name of the city in which you were man | rried?* |
| | • |
| | |
| G Back to Log In | Submit |
| | |
| | |
| | |

2.4 Log out / Sign out

To log out from E-Feasibility, follow these steps:

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

| ? | Sign Off Reset Password | |
|---|----------------------------|--|
| | Number of Responses | |
| | 1 | |
| | 1 | |
| | 1 | |

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|--|--|
| | |

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3. EFEASIBILITY PROCESS SUMMARY

E-Feasibility defines the following components:

Projects: A project in an E-Feasibility a space assigned to the client in TI instance. To create a project, users have to create a room in multi-tenant eTMF application.

User Roles: E-Feasibility defines below mentioned roles for the users in a project:

- Administrator: Administrator has access to all functionalities and projects, including user permission management.
- Manager: Manager has access to all the functionalities within a project
- Editor: Editor has the ability to create and edit forms in a project.
- Publisher: Submitter is a registered user contact with the ability to complete a survey within a system.
- Submitter: Publisher has the ability to send and review responses for created forms.

Categories: Categories in E-Feasibility are used to segregate questions and forms with particular shared characteristics under specific groups. E-Feasibility defines following Categories:

- Question Category
- Form Types

Questions: Every form in a project consists of questions, which allows the user to conduct a survey for clinical research.

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

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4. EFEASIBILITY DASHBOARD

Logging into eFeasibility opens the dashboard, provide complete overview of an opened project.

4.1 Title Bar

The Title Bar consists of the following:

- TI Logo
- Dropdown
- Background Jobs
- User Account
- User Guide Information

| | RIAL NTERACTIV | ′E (\$224 ♥ | | | 0 | testmailefeasibility 🗸 |
|----|-------------------|-------------|-------------------|-----------------------------------|-------------------|------------------------|
| * | Favorite For | ms | | Latest Responses | | View more |
| + | | Title | Date Last Updated | Title | Date Last Updated | Number of Responses |
| B | * | sec1 | Mar 18, 2025 | Recurring form1 | Mar 19, 2025 | 1 |
| | * | New Project | Mar 18, 2025 | RequiredHiddenQuestion | Mar 19, 2025 | 1 |
| | * | simpleform | Mar 18, 2025 | anonymous form | Mar 19, 2025 | 1 |
| | | | | simple form 111 | Mar 19, 2025 | 1 |
| | | | | supform mcss | Mar 19, 2025 | 1 |
| | | | | DateRequiredHidden | Mar 19, 2025 | 1 |
| 02 | | | | CountryRequiredHidden | Mar 19, 2025 | 1 |
| | | | | AcknowledgeIsNotEditableOwnPrefix | Mar 19, 2025 | 1 |
| | | | | New | Mar 18, 2025 | 1 |
| | | | | 8229 form 1 | Mar 18, 2025 | 1 |
| | | | | | | |

4.1.1 TI Logo

The **Trial Interactive** logo appears in the upper left corner of the dashboard. Click the logo in the title bar to navigate to the dashboard of the current project if the user is not already in the dashboard.

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| TRIAL INTERACTIVE * qa24 * | | | | | |
|-------------------------------|-------------------|-------------|-------------------|--|--|
| >> | >> Favorite Forms | | | | |
| + | | Title | Date Last Updated | | |
| L a | * | sec1 | Mar 18, 2025 | | |
| | * | New Project | Mar 18, 2025 | | |
| | * | simpleform | Mar 18, 2025 | | |
| 쓭 | | | | | |
| o: | | | | | |
| ▦ | | | | | |

4.1.2 Dropdown

The Project dropdown appears as a dropdown. It displays the list of projects, which are assigned to you, and allows you to switch between projects, if you are assigned to multiple projects. It also allows you to mark a project as favorite by clicking the star next to the project name.

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.

| | | | 🔶 qa24 🔽 | |
|----------|------------|-------------|---------------------------------------|--|
| » | Favorite F | orms | InternalTest 🔂 🕯 | |
| + | | Title | TransPerfect Customer 🟠 Experience | |
| | * | sec1 | Life Sciences Production 😭 Demo 🏠 | |
| | * | New simp | INC Research ☆ QA ☆ | |
| | | | CSR Test 🗘 🖕 | |
| % | | | | |

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To switch a project, follow these steps:

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

4.1.3 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 their own job task.

| | | ? | O 61 | tes | tmailefeasib | ilty | ~ |
|-----------|----------------------------|--------|-------------|-----|--------------|------|---|
| Backgr | ound Jobs | | | | | | |
| Send F | ⁻ orm Emails | | | | | × | Ū |
| Status: | | 100% | | | Completed | | |
| Start dat | e: 32 minutes ago | | | | | | |
| Complet | ed date: 32 minutes ago | | | | | | |
| total: 1 | failed: 0 succeed: 1 | | | | | | |
| Send F | Form Emails | | | | | × | |
| Status: | | 100% | | | Completed | | |
| Start dat | e: 2 hours 59 minutes ago | | | | | | |
| Complet | ed date: 2 hours 59 minute | es ago | | | | | |
| total: 1 | failed: 0 succeed: 1 | | | | | | |
| Send F | Form Emails | | | | | × | |
| Status: | | 100% | | | Completed | | |
| Start dat | e: 3 hours 19 minutes ago | | | | | | |
| Complet | ed date: 3 hours 19 minute | es ago | | | | | _ |
| | | Close | | | | | Ť |

Processing Background Jobs Notifications

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

The user is then redirected to the Form Overview screen, and a notification appears in the notification area. By clicking the notification icon, the user can access the **Background Jobs** screen, which displays details about the background job. These details include:

- Email processing status
- Dates when the emails were sent and when the job was completed
- Total number of emails sent

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• Counts of total, successful and failed emails

4.1.4 User Account

User Account appears as a dropdown with the name of the user logged in. It allows to Sign Off and Reset Password of the application.

To reset the password, follow these steps:

- 1. Click Reset Password from the dropdown.
- 2. On the Password Reset page, enter email address in the field.
- 3. Click the **Send request** button to send the request and the password reset link will be sent to registered email address.
- 4. Open the email, click the reset link, and follow the on-screen instructions to reset password.

| ? | (74) | testmailefeasibilty 🗸 |
|---|--------------|------------------------------|
| | | Sign Off |
| | | Reset Password ^{re} |
| | | |
| | Number | of Responses |
| | 1 | |
| | 2 | |
| | 2 | |

4.1.5 User Guide Information

The **User Guide** is readily accessible from the title bar, allowing users to find help and support when needed. To Open the User Guide, follow these steps:

- 1. Navigate to the question mark (?) icon in the title bar.
- 2. Click on the (?) icon.
- 3. The User Guide will open on a new page, providing detailed instructions and assistance.

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| User Guide Information | (74) | 📤 testmailefeasibilty 🗸 |
|------------------------|--------------|-------------------------|
| | | View more |
| Date Last Updated | Number | of Responses |
| Mar 21, 2025 | 1 | |
| Mar 21, 2025 | 2 | |

4.2 Tiles

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

- Favorite Forms
- Latest Responses
- Progress of Top 20 most Active Forms
- View More

| | # Forms | | Latest Responses | | vie |
|-----------------------|------------------------------|-------------------|------------------------------|-------------------|-----------------|
| | Trie | Date Last Updated | Téle | Date Last Updated | Number of Respo |
| * | New Project | Mar 18, 2025 | DeclineWithoutReasonSuppForm | Mar 21, 2025 | 1 |
| * | simpleform | Mar 20. 2025 | Rec1_decline | Mar 21, 2025 | 2 |
| | EditSuppFormSubmitterView | Mar 21, 2025 | CancelDeclineSuppForm | Mar 21, 2025 | 2 |
| * | EditSuppFormRequiredQuestion | Mar 21, 2025 | 11,5 | Mar 21, 2025 | 2 |
| | | | 7867_r1 | Mar 21, 2025 | 2 |
| | | | R2_Submitter2 | Mar 21, 2025 | 1 |
| | | | R1_Manager | Mar 21, 2025 | 1 |
| | | | EditSuppFormRequiredQuestion | Mar 21, 2025 | 1 |
| | | | EditSuppFormSubmitterView | Mar 21, 2025 | 1 |
| | | | Submitter1 | Mar 20, 2025 | 1 |
| | | DAY & DUCK THE 17 | IP 701 MONT BE TIME FORMS | | |
| yuung 2 | | Y Bingh | | | |
| Vorant 2 2 2 | 0 | y Relation | nda lanan la | [10].) support | n her Fyre |

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4.2.1 Favorite Forms

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

| ▼ Pa24 ▼ Favorite Forms | | | | | |
|---------------------------------------|---|------------------------------|-------------------|--|--|
| + | | Title | Date Last Updated | | |
| | * | New Project | Mar 18, 2025 | | |
| | * | simpleform | Mar 20, 2025 | | |
| | * | EditSuppFormSubmitterView | Mar 21, 2025 | | |
| | * | EditSuppFormRequiredQuestion | Mar 21, 2025 | | |
| ** | | | | | |

4.2.2 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.

| | (| ? Č ⁷⁴ 📤 testmailefeasibilty 🗸 |
|------------------------------|-------------------|---|
| atest Responses | | View more |
| Title | Date Last Updated | Number of Responses |
| DeclineWithoutReasonSuppForm | Mar 21, 2025 | 1 |
| Rec1_decline | Mar 21, 2025 | 2 |
| CancelDeclineSuppForm | Mar 21, 2025 | 2 |
| s1_r | Mar 21, 2025 | 2 |
| 7867_r1 | Mar 21, 2025 | 2 |
| R2_Submitter2 | Mar 21, 2025 | 1 |
| R1_Manager | Mar 21, 2025 | 1 |
| EditSuppFormRequiredQuestion | Mar 21, 2025 | 1 |
| EditSuppFormSubmitterView | Mar 21, 2025 | 1 |
| Submitter1 | Mar 20, 2025 | 1 |

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4.2.3 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.



4.2.4 View More

The View More link in the top-right corner of the Latest Responses dashlet opens the Forms Dashboard, which displays a table of forms. Users can also access this page by clicking **Forms** from the left-side toggle menu on the dashboard.

| | (| ? Č ⁿ (a) · · |
|---|-------------------|--------------------------|
| Latest Responses | | View more |
| Title | Date Last Updated | Number of Responses |
| TPTEF-5422 | Apr 3, 2025 | 3 |
| TPTEF-5410 | Apr 1, 2025 | 3 |
| Mvr1_simple | Mar 21, 2025 | 2 |
| yesvaform | Mar 21, 2025 | 4 |
| Cancel_Declined form_simple | Mar 21, 2025 | 2 |
| MVR_Decline1 | Mar 21, 2025 | 2 |
| InProgressSurvey1 | Mar 21. 2025 | 1 |
| AttachementSuppFormRecurringForm_simple | Mar 21. 2025 | 2 |
| R2_Submitter2 | Mar 21, 2025 | 1 |
| AddAttachement | Mar 21, 2025 | 2 |

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4.3 Toggling Sidebar Navigation

The Toggling Side Navigation 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 Toggle Sidebar Navigation. Click each marked area for further details of the functionality.

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

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

| l | TRIAL INTERACTIVE | \star qa | 24 🗸 | | | (?) |
|----------|----------------------|----------|------------------------------|-------------------|---|-------------------|
| | * | Favorit | e Forms | | Latest Responses | |
| + | New Form | | Title | Date Last Updated | Title | Date Last Updated |
| | Forme | * | New Project | Mar 18, 2025 | TPTEF-5422 | Apr 3, 2025 |
| | roms | * | simpleform | Mar 20, 2025 | TPTEF-5410 | Apr 1, 2025 |
| | Categories | * | EditSuppFormSubmitterView | Mar 21, 2025 | Mvr1_simple | Mar 21, 2025 |
| | Categories | * | EditSuppFormRequiredQuestion | Mar 21, 2025 | yesvaform | Mar 21, 2025 |
| | Contacts | | | | Cancel_Declined form_simple | Mar 21, 2025 |
| | | | | | MVR_Decline1 | Mar 21, 2025 |
| | | | | | InProgressSurvey1 | Mar 21, 2025 |
| | | | | | AttachementSuppFormRecurringForm_simple | Mar 21, 2025 |
| | Reports | | | | R2_Submitter2 | Mar 21, 2025 |
| — | | | | | AddAttachement | Mar 21, 2025 |
| L | | | | | | |
| | | | | PROGRESS OF | F TOP 20 MOST ACTIVE FORMS | |

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5. NEW FORM

To create a new form, navigate to the left menu bar and click on the + icon, or select the **New Form** option from the expanded menu. This will take you to the Create New Form page.

5.1 Create New Form

To create a new Form, follow these steps:

- 1. Open a required project, from the project dropdown, available at the top.
- 2. Click the New Form from the left side Menu Bar.
- 3. Fill the data in the required fields and click the **Continue** button.

| | RIAL NTERACTIVE 🔶 qa24 👻 | | • | Ō | 📤 testmailefeasibility 🗸 |
|--------|-----------------------------|------------------------------------|--------------------------|-----|--------------------------|
| * + | Create new form | | | | |
| ۵ | | Create From Existing Form | | | |
| ٠ | Title* | New Form | | | |
| * | Type- | New Supplementary Form title | | ~ | |
| œ | Study | Preview available System Generated | questions for selected (| ype | |
| ■ | Organization | | | | |
| | Instructions | | | | |
| | | | | h | |
| | | Continue | | | |

- 4. A new form will open based on the selected type. It will include fields such as: First Name, Last Name, Email, Institution Name, Institution Address, City and more.
- 5. Once all the required data is filled in, click Publish. A new window will pop up with **Form type** options, such as: Simple form, Supplementary form, Monitoring Visit form, recurring form, Anonymous.
- 6. Please note that once user publishes the form, it can no longer be edited. Confirm that user would like to proceed with publishing.

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5.2 Changing Logo

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

To change Logo, follow these steps:

- 1. Open a required draft Form.
- 2. Open the form where the user wants to change the logo. The form opens in Edit mode, allowing you to also edit the General fields.
- 3. Double-click the logo located at the top-left corner. The File Upload dialog box appears.
- 4. Select the desired image and click **Open**.
- 5. The selected image is uploaded and applied as the new form logo.

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5.3 Add Question to a Form

Navigate to the Add Question button, located vertically on the right-hand side of the New Form screen. This action will display the Add Question panel.

The Add Question panel has three sections, as follows:

- a. Question from Library: This allows the user to select and add a question from the list of saved questions. It also allows the user to clone a question.
- b. Create Question: This allows the user to add questions manually.

Question Type: Text Field: Once these field types is selected, the **Content Restriction** option becomes available, allowing users to define specific input rules or validation criteria for the field. This feature helps ensure that responses adhere to the expected format or range such as Alpha, Email, Phone, Phone with Extension, Number.

Content Restriction:

- Alpha: Allows the submitter to enter only letters, spaces, periods, commas, and symbols within the specified character limit.
- Email: Allows the submitter to enter a valid email address only.
- Phone: Allows the submitter to enter a phone number in the format: XXX-XXX-XXXX-XXXX.
- Phone with Extension: Allows the submitter to enter a phone number along with an extension.
- Number: Allows the submitter to enter numbers only within the specified range.
- c. Library: This section allows you to save questions to a list, which can be retrieved later from the library.

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5.3.1 Creating Question from Add Question Tab

The Create Question dialog box provides an interactive interface that guides through various options and features user can associate with a question during its creation. It appears when you click the Add Question tab on the Draft Form page and includes the following components, each contributing to the configuration of a question type. To Create question to add it in Form, follow these steps:

- 1. Click the Add Question button located in the right-hand corner of the New Form screen.
- 2. The Create Question section will appear in a new window.
- 3. Manually enter the question in the Question field marked with an asterisk (*), indicating it is required.
- Select a Question Type from the following options: Comments Field, Date Field, Text Field, Country Field, Multiple Choice-Checkbox, Multiple Choice-Dropdown, Multiple Choice-Single Selection, Multiple Choice-Single Dropdown.

Note: When a form is created, the Manager can select default answers and publish it. If the submitter or end user finds the default answers incorrect, they can modify them. However, setting default options is not applicable for the following field types: Comments, Date, Acknowledge, Text, and Country.

| Create Question: Question: * Question text Question Type: Comments Field Date Field Multiple Choice-Checkbox | _ | | | | | |
|--|----------------------------------|--|--|--|--|--|
| Question: * Question text Question Type: Comments Field Date Field Multiple Choice-Checkbox | | | | | | |
| Question text Question Type: Comments Field Date Field Multiple Choice-Checkbox | | | | | | |
| Question Type: Comments Field Comments Field Date Field Multiple Choice-Checkbox | | | | | | |
| Comments Field Comments Field Date Field Multiple Choice-Checkbox | _1 | | | | | |
| Comments Field Date Field Multiple Choice-Checkbox | ~ | | | | | |
| Date Field Multiple Choice-Checkbox | | | | | | |
| Multiple Choice-Checkbox | Date Field | | | | | |
| | | | | | | |
| Multiple Choice-Dropdown | | | | | | |
| Multiple Choice-Single Selection | Multiple Choice-Single Selection | | | | | |
| Multiple Choice-Single Dropdown | Multiple Choice-Single Dropdown | | | | | |
| Matrix of Radio Buttons | Matrix of Radio Buttons | | | | | |
| Acknowledge Field | | | | | | |
| Text Field | | | | | | |
| Country Field | | | | | | |

 The Answer Options section displays rows for entering possible answers, along with Behavior and Is Default columns.

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- 6. Select a **Checkbox** under the **Is Default** column for one of the options. Observe that selecting one disables the others, allowing only one default option.
- 7. Set Additional Question Properties:
 - **Category**: Assign a category for organizing the question.
 - Make Required: Check this box if answering the question should be mandatory.
 - Hidden Question: Select this option to hide the question from the end user.
 - Setup last sub-question as text answer: Enable this option when you want the final sub-question in a multi-part question to accept a free-text response. This is useful when the last sub-question requires a detailed or descriptive input rather than a predefined option, such as comments or clarifications.

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| ∽ + Question | n From Library | | | | | | |
| Create Question: | | | | | | | |
| Question: * | | | | | | | |
| Question text | | | | | | | |
| Question Type: | Question Type: | | | | | | |
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| Answer options | Behavior Is default | | | | | | |
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| Another | | | | | | | |
| Category Make Required Hidden Question Setup last sub-questi | ion as text answer | | | | | | |
| + Library | Add | | | | | | |

- 8. Click the Add button at the bottom of the window. The question will be added to the form.
- 9. Click the Publish button located at the center bottom of the screen to finalize and publish the form.

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5.3.2 Adding a Question from Library

To Add a question from Library, follow these steps:

- 1. Click the Add Question button located in the upper-right corner of the New Form screen.
- 2. In the Add Question tab, click the **Question from Library** button. A *Question Search* dialog box will appear, displaying a list of available questions.
- Select questions by clicking the + icon next to each desired question, then click Add Selected to add them to the form.
- 4. You can also search for questions based on **answer type** and **category**.

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| ~ | SPACE TAG | | tagpart1 tagpart2 please me | Text Field | Mar 17, 2025 | |
| + | tag1 | | tag | Text Field | Mar 17, 2025 | |
| + | Question text | | tagfirst tagsecond | Text Field | Mar 17, 2025 | |
| + | TD2 | cat2 | | Date Field | Mar 13, 2025 | |
| + | Q1 | Demo | | Text Field | Mar 13, 2025 | |
| + | Multiple Choice-Single Selection | | | Single Selection | Mar 11, 2025 | |
| + | Comments | | | Comments Field | Mar 11, 2025 | |
| + | QUESTION4 | | | Multiple Selection | Mar 11, 2025 | |
| + | QUESTION4 | | | Multiple Selection | Mar 11, 2025 | |
| + | Acknowledge | | | Acknowledge Field | Mar 10, 2025 | |
| Show | 10 👻 | | ≪ < 1 2 3 4 > ≫ | | | c |
| | | | Cancel Add Selected | | | |

5.3.3 Adding Question to Library

Steps to add question to Library, from Create question.

- 1. Click the Add Question button located in the right-hand corner of the New Form screen.
- 2. The Create Question section will appear in a new window.
- 3. Manually enter the question in the **Question** field marked with an asterisk (*), indicating it is required.
- 4. To add the question to the library directly from the Create Question section, click the **Library** button located at the bottom center of the screen.
- 5. The Add Question to Library window will appear. Fill in the required fields and click the Add button.

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5.4 Add a Section to a Form

The Add Section option allows users to create a new section in the form and add a custom heading.

To Add the sections to a form, follow these steps:

- 1. On the Form Draft page, click the Add Section tab on the right panel.
- 2. In the Add Section tab, provide the following details:
 - Title Enter a title for the section.
 - **Description** (Optional) Enter a description for the section, if needed.
- 3. Click Add Section button to insert the new section into the form.

Note: The user can reorder sections using the following methods:

- Use the **Up** and **Down** arrows to move a section.
- Drag and drop the section to the desired position.

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5.5 Adding Instructions to a Form

The Instruction textbox allows the user to update the guidance provided to users before they fill out the form.

To edit the instructions, follow these steps:

- 1. On the Form Draft page, hover your mouse over the Instruction textbox.
- 2. Click inside the Instruction textbox to enable editing.
- 3. Enter or update the instructions to guide users before they fill out the form.

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| » + | TRIAL | New Form |
| | Please complete all required fields marked with an asterisk (*). | |
| ٠ | Provide accurate and up-to-date information to avoid delays in processing. If a field does not apply, enter "N/A" or leave it blank as specified. | |
| * | Select / Deselect All | |
| o: | General | |

5.6 Cloning a Form

Cloning allows you to create a new form based on an existing one. The user can clone any form already saved to the library.

To clone a Form, follow these steps:

- 1. Open a required project from the project dropdown, available at the top.
- 2. Click New Form from the left-side Menu Bar. The Create New Form dialog box will appear.
- 3. Select the Create from Existing Form checkbox. A Search existing form textbox appears.
- 4. Click the Magnifying Glass (Search) icon. The Form Search dialog box opens, displaying a list of existing forms.
- 5. Enter the form title in the search box, or select a form from the list that you want to clone.
- Click the Add Selected button to copy all fields from the selected form to the new form. The Add Selected button is disabled by default and becomes active only when a form is selected.
- 7. You are redirected to the Create New Form page. The selected form type appears in the Search textbox.
- 8. Complete all required fields on the **Create New Form** page, then click **Continue**. All fields from the cloned form will be added to the new form.

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5.7 Editing the Question

To edit a question of the Form, follow these steps:

- 1. Click the **Edit** icon next to the question you want to edit in the form.
- 2. A Question Edit window will pop up, allowing the user to modify the required details.
- 3. Click **Update** to save the changes to the form.

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| * | General | Question type: Text Field | BOOX | | | | |
| ¢\$ | 1. Last Name | Content restriction: | 300 × | | | | |
| ■ | | Answer options | | | | | |
| | 2. First Name | Another | © o o × | | | | |
| | | Category Make required Hidden question | | | | | |
| | 3. Middle Name | Answer choices must be the same | BOOX | | | | |
| | | Cancel Ubrary Update | | | | | |

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5.8 Editing the Section

To edit a section of the Form, follow these steps:

- 1. Click the Edit icon in the section header. A dialog box will open.
- 2. In the Section Edit window, you can update the Title and optionally the Description.
- 3. Click **Update** to save the changes to the form.



5.9 Setting Additional Question Properties

Set Additional Question Properties from the Add Question Tab. Additional properties can be found under the selected **Question Type** in the **Create Question** section.

- **Category**: Assign a category for organizing the question.
- Make Required: Check this box if answering the question should be mandatory.
- Hidden Question: Select this option to hide the question from the end user.
- Setup last sub-question as text answer: Enable this option when you want the final sub-question in a multi-part question to accept a free-text response. This is useful when the last sub-question requires a detailed or descriptive input rather than a predefined option, such as comments or clarifications.

Hidden Question:

A survey can include questions that remain hidden until a specific answer option is selected in a preceding question.

Note: At least one Multiple Choice question is required to enable hidden questions. This feature is not applicable

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to question types other than Multiple Choice questions displayed in a survey.

To make the question hidden, follow these steps:

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

- 1. On the Form Draft Page, click the Add Question tab on the right.
- 2. Add questions to the Form.
- 3. Select the Hidden Question checkbox for the question, which you want to hide. Refer to the screenshot below.
- 4. This hidden question is invisible on the survey by default when the submitter opens it.
- 5. Click Add to add the question to the Form. The hidden question appears as Hidden next to the question.



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- 6. To make the question visible again, follow the steps below:
 - Select the question that you want it visible. Click the Edit icon next to the Question. The Question Edit dialog box is displayed.
 - Unselect the checkbox next to Hidden Question. Click the Update button. Refer to the screenshot below.
 - The question is now visible to the user.

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| * | 8. 8 Country Field * | € C O O × |
| 0 8 | Answer options 👻 | |
| | 9. Users can perform the following actions on a Supplementary Form: Hidden | ℓ2 C O O × |
| | Create | |
| | Approve | |
| | C Reject | |

To make the question visible again, follow these steps:

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 icon next to the Question to which you want to apply logic to make the Hidden Question visible. The Edit Question popup window is displayed.
- 2. Click the Behavior icon next to the answer option for which you want to make the hidden question visible. Refer to the screenshot below.
- 3. A dialog box opens which displays the following:
 - 1. **Position**: The position of the question.
 - 2. Questions: Available questions in the Form.
 - 3. Visibility: The options Visible and Hidden to change make the question hidden.
- 4. Notice that the Hidden Question displays the Visibility as Hidden.
- 5. Click Hidden button next to hidden question. The Hidden button changes from Hidden to Visible. Similarly, you can also hide other questions by changing the visibility of the question.
- 6. Click Apply. Refer to the screenshot below.

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- 7. You are redirected to the Edit Question page.
- 8. Click Update to save the changes. You are redirected to the Form Draft Page.

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| | Approve | | Cancel Library Update | | | ed tion |
| | Reject | | | | Answer cho | ices must be the same |

- 9. Unselect the checkbox of Hidden Question.
- 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.

To add matrix of radio buttons option, follow these steps:

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.

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

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| | Category Make Required | | + Add Row | | | | | |
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- 6. Click the **Behavior** icon to view and select the visibility of the questions.
 - **Position**: The position of the question.
 - **Questions**: Available questions in the Form.
 - Visibility: The options Visible, Hidden and Inactive to change make the question hidden. Refer to the screenshot below.
- 7. Select the visibility of the question by clicking the **Invisible** button. Refer to the above screenshot.
- 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.
- 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.

5.10 Actions on Forms before Publishing

There are certain actions that a user can perform on the forms before publishing it. Refer to the screenshot below. The Form Draft page provides the following options before publishing it.

- Previewing Forms
- Test Email
- Contact Configuration

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5.10.1 Previewing Forms

Preview provides an overview of the created form before publishing.



To preview a Form, follow these steps:

- 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. The user can also save the form, click the **Save as PDF** button from the Form Preview page

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

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| | General | | | | |
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| | 3. First Name | | | | |
| | 4. Email | | | | |
| | 5. Institution Name | | | | |

5.10.2 Test Email

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

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| * + | TRIAL | New Form |
| | Test Form | |
| ٠ | Instructions | |
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| | 1. Last Name | |
| | 2. Middle Name Preview Test Email Contact Configuration Close Actions | Publish |

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To send a Test Email, follow these steps:

- 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.

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

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| | If you have any questions about the questionnaire or Trial Interactive please visit us at www.trialinteractive.com | or e-ma | il us at <u>heip</u> | @trialinteractive.com |
| | Thank you for your participation! | | | |

5.10.3 Contact Configuration

Contact configuration allows you to map Question Types related to the Contact information with the corresponding Custom Contact Fields. When a form is sent to the submitter, these mapped contact fields are 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.

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| * | | New Form |
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| | 4. Email | |
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| | | Test Email |
| | | |
| | | Close Actions A Publish |

To map the Contact information, follow these steps:

- Click Contact Configuration option from Actions dropdown displayed at the bottom of the window on the Form Draft page. Contact Configuration dialog box appears which displays Questions and Contact field dropdowns.
- 2. Setup the mapping between Question and Contact fields.
- 3. Click the Save button to map the fields.

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

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5.11 Publishing Forms additional option

The user 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, follow these steps:

- 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
- 2. And Additional options with checkboxes
 - Save form to the library
 - Require attachments from recipients

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- 3. Select the required checkbox and then click the Publish button to publish the form. Refer to the screenshot below.
 - The Form Statistics Page opens which displays an overview of the form. You can also visit this page by clicking the Form Title from the Form Dashboard.
 Note: The user cannot edit a form after it is published.

5.11.1 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.

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5.11.2 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.

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

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| ۲ | | Publish Form? | | |
| * | | Once you Publish the form, it cannot be edited further. Please confirm that you we publish the form. Eorem type: | ould like to | - 1 |
| 08 | | Simple form. | | 1 |
| m | 1. First Name | Monitoring Visit form, Recurring form. Anonymous form. | | 1 |
| | | Additional options: | | - 8 |
| | 4. Email | Require attachments from recipients. | | _ |
| | | Cancel | _ | |
| | | Close Actions A Publish | | |

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6. FORMS

The **Forms** section provides a tabular view of all created forms and surveys, allowing users to manage their lifecycle and track their usage.

It is divided into the following columns:

- General Forms
- Supplementary Forms

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| Forms | Showing | g 10 entries out of 417 | | | |
| | | Title | Study Name | Organization | Туре |
| | ☆ | New Form | | | Test Form |
| ٠ | ☆ | New Form | | | 3 All types - all required |
| | ☆ | New Form | | | Site Feasibility |
| ** | ☆ | Draft test | | | empty |
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| ¢\$ | ☆ | New Form | | | Acknowledge questions |
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| | Show | 10 🗸 | | | |

6.1 Generals Forms

This section describes the form view in the application.

6.1.1 The Form Dashboard

The Form Dashboard displays a list of all Published, Draft, and Closed Forms, and provides the following actions:

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

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| 1 | Ge | meral Forms | Supplementary Forms | | | | | | | | | |
|----|-------|-----------------------|---------------------|------------|-------------------|-----------------------|-------------------------------|--------------|--------------|-----------|-----------|-----|
| 1 | Showi | ing 10 entries out of | n6 | | | | | | | | Q, Sear | ch. |
| Ŀ. | | Title | | Study Name | Organization | Type | Created By | Date Created | Date Updated | Status | Responses | Ac |
| | | new form | | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 | Mar 27, 2025 | draft | 0 | - 0 |
| | | New form | | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 | Mar 27, 2025 | published | 0 | |
| | \$ | Draft test | | | | empty | gatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | |
| | | New form | | | | empty | gatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | |
| | | New Form | | | | Acknowledge questions | testmailefeasibilty@gmail.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | |
| | | test form rad | | test study | test organization | empty | gatest1323@outlook.com | jan 29, 2025 | Mar 24, 2025 | closed | 4 | |
| | \$ | Mvr1_simple | | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |
| | | yesvaform | | | | 1 One question | qatest1323@outlook.com | jan 30, 2025 | Mar 21, 2025 | published | 4 | |
| | \$ | Cancel_Decla | ed form_simple | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |
| | | MVR_Decline | | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |

6.1.2 Searching for Forms

This helps users quickly access the form they need from the list displayed on the Forms Dashboard. To search a form, follow these steps:

- 1. Click the Forms icon from the left navigation panel to open the Form Dashboard.
- 2. Use the Search bar located at the top right corner of the page.
- 3. Enter the Form Title or relevant keyword and press Enter. The table updates to display forms matching the entered text.
- 4. To clear or modify the search, click the X (Clear) icon inside the search box.

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| 1 | | Title | Study Name | Organization | Type | Created By | Date Created | Date Updated | Status | Responses | Actions |
| 1 | | new form | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 | Mar 27, 2025 | draft | 0 | |
| | | New form | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 | Mar 27, 2025 | published | 0 | |
| | | New form | | | empty | gatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | |
| | | New Form | | | Acknowledge questions | testmailefeasibilty@gmail.com | Mar 24, 2025 | Mar 24, 2025 | published | • | |
| | | New Form | | | Acknowledge questions | testmailefeasibilty@gmail.com | Mar 21, 2025 | Mar 21, 2025 | draft | 0 | |
| | | New Form | | | New Supplementary Form title | testmailefeasibilty@gmail.com | Mar 19, 2025 | Mar 20, 2025 | published | 1 | |
| | | new form 7511 | | | Monitoring Visit Form | gatest1323@outlook.com | Mar 4, 2025 | Mar 4, 2025 | draft | 0 | |
| | | new form 7509 | | | empty | qatest1323@outlook.com | Mar 4, 2025 | Mar 4, 2025 | published | 0 | |
| | | new form 7506 | | | empty | gatest1323@outlook.com | Mar 4, 2025 | Mar 4, 2025 | published | 0 | |
| | | new form 7505 | | | empty | gatest1323@outlook.com | Mar 4, 2025 | Mar 4, 2025 | published | 0 | |
| | Show | 10 Y | | | | ≪ <12>> | | | | | ٥ |

6.1.3 Filtering of Forms

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

To apply filter on Forms, follow these steps:

- 1. Click the **Filter** icon at the top-right corner of the page. Textboxes will appear below each column, allowing user to filter the list of forms.
- 2. Enter the desired filter criteria in the appropriate textboxes. The list will automatically update to display forms that match the selected filters.

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| | * | | 1 | | | | | | 41 | * | |
| | | new form | - | | Test Form | testmalefeasibilty@gmail.com | Mar 27, 2025 | Mar 27, 2025 | draft | 0 | |
| | | New form | | | Test Form | testmallefeasibility@gmail.com | Mar 27, 2025 | Mar 27, 2025 | published | 0 | |
| | | Draft test | | | empty | gatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | - |
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| | | Mvr1_simple | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published. | 2 | - |
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| | | Cancel_Declined form_simple | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |
| | | MVR,Decline1 | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | - |
| L | Show | 10 | | | | <<123455 B | | | | | |

6.1.4 Refreshing Forms Page

Refreshing the Forms page resets all changes and settings applied to the page, including filters, sorting, or column customizations.

- 1. Navigate to the Forms Dashboard.
- 2. Locate the **Refresh** icon at the bottom-right corner of the page.
- 3. Click the **Refresh** icon.
- 4. The page will reload, and all applied settings will be cleared, returning the view to its default state.

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| | | Title | Study Name | Organization | Type | Created By | Date Created | Date Updated | Status | Responses | Actions |
| | | new form | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 | Mar 27, 2025 | draft | 0 | |
| • | | New form | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 | Mar 27, 2025 | published | 0 | |
| | | Draft test | | | empty | gatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | |
| ۳. | | New form | | | empty | gatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | |
| | | New Form | | | Acknowledge questions | testmailefeasibilty@gmail.com | Mar 24, 2025 | Mar 24, 2025 | published | • | |
| 0 6 | | test form rad | test study | test organization | empty | gatest1323@outlook.com | Jan 29, 2025 | Mar 24, 2025 | closed | 4 | |
| _ | | Mvr1_simple | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |
| ••• | | yesvaform | | | 1 One question | gatest1323@outlook.com | Jan 30. 2025 | Mar 21, 2025 | published | 4 | |
| | | Cancel_Declined form_simple | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |
| | | MVR_Decline1 | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |
| | Show | 10 - | | | ≪ < 1.2 | 345>> | | | | | 0 |

6.1.5 Editing a Draft Form

Newly created forms are initially saved as **Drafts** before being published. Users can edit these draft forms at any time before publishing.

To edit a draft form, follow these steps:

- 1. Navigate to the Forms Dashboard.
- 2. Locate the draft form you want to edit from the list.
- 3. Click on the **form title**.

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| | | bew form | | | Test Parm | testmalefeasibilty@gmal.com | Mar 27, 2025 | Mar 27, 2028 | O'MC | 0 | |
| | | New form | | | Test Form | testmalefeasibilty/bgmail.com | Mar 27, 2025 | Mar 27, 2025 | published | | |
| | | Oraft test | | | empty | gatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | |
| | | New form | | | entsity | gatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | (0) | |
| | | New Form | | | Acknowledge questions. | testmalefeastbitydigmail.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | |
| | | besit Soren rad | test study. | test organization | empty | gatest1323@outlook.com | jan 29, 2025 | Mar 24, 2025 | closed | 4 | |
| | | Mirt, single | | | empty | gatest/1223@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | - |
| | | yesvaform | | | 1 One question | gatest1323@outlook.com | jan 30, 2025 | Mar 21, 2025 | published | 4 | - |
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| | Show | 10 | | | e - | 1234578 | | | | | |
| | | 101200 | | | | | | | | | |

4. The form will open in edit mode.

- 5. Make the required changes to the form content or fields.
- 6. Once done, the user can either save the form as draft again or publish it, depending on readiness.

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| | | | |
| | 3. First Name | | (2) (2) (2) (2) (2) (2) (2) (2) (2) (2) |

6.1.6 Changing the Study, Type and Organization of a Form

To edit Study, Type and Organization, follow these steps:

Note: The fields – Study, Type, and Organization become visible only when the user hovers the mouse over the top-right corner of the form.

- 1. Navigate to the Forms Dashboard.
- 2. Locate the draft form you want to edit from the list.
- 3. Click on the form title.
- 4. The form will open in edit mode.
- 5. Hover your mouse over the **Study** field. The **Edit** icon will appear next to the field.
- 6. Click the Edit icon. A textbox will appear next to the Study field.
- 7. Modify the value as needed and press Enter to save the changes.
- 8. Repeat the same steps to edit the Type and Organization fields.

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| Instructions | | ହା ହ o o × |
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6.1.8 Adjusting the Forms List Display

This allows the users to manage/change the number of entries of forms that appear on a Form Dashboard. To navigating and adjusting the Forms List Display, follow these steps:

- 1. Click the **Show** dropdown at the bottom-left corner of the page.
- 2. Select the number of entries (10, 25, 50, or 100) to display per page on the Forms Dashboard.
- 3. Use the **pagination controls** at the bottom-center of the page to navigate through the list of forms:
 - Click the single arrows (< or >) to go to the previous or next page.
 - Click the **double arrows** (<< or >>) to jump to the **first** or **last** page in the list.
 - You can also click on any of the page numbers to jump directly to that page

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| | new form | | | Test Form | testmalefeasibility@gmail.com | Mar 27, 2025 | Mar 27, 2025 | draft | 0 | |
| 2 | New form | | | Test Form | testmalefeasibility@gmail.com | Mar 27, 2025 | Mar 27, 2025 | published | 0 | |
| • | Draft test | | | empty | gatest1323/houtlook.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | - |
| 0 | New form | | | empty | gatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | a | |
| | New Form | | | Acknowledge questions | testmalefeasibilty@gmail.com | Mar 24, 2025 | Mar 24: 2025 | published | a | - |
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| 2 | Murt_simple | | | empty | gatest1323/boatlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |
| | yesvaform | | | 1 One question | gatest1323@outlook.com | jan 30. 2025 | Mar 21, 2025 | published | 4 | |
| 10 | Cancel_Declined form_simple | | | empty | gatest1323@outlock.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |
| 0 | MVR_Decline1 | | | empty | gatest1323/boutlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |
| | - | | | | | | | | | |

6.1.9 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:

- Save to Library
- Convert to Draft
- Delete Form

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| , | nowing | g 10 entries out of 416 | | | | | | | | Q Search | |
| | | Title | Study Name | Organization | Type | Created By | Date Created | Date Updated | Status | Responses | Actio |
| | | new form | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 | Mar 27, 2025 | draft | 0 | 1 |
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| | | New form | | | empty | gatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | U U | ۰. |
| | | New Form | | | Acknowledge questions | testmailefeasibilty@gmail.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | |
| | | test form rad | test study | test organization | empty | gatest1323@outlook.com | Jan 29, 2025 | Mar 24, 2025 | closed | 4 | |
| | | Mvr1_simple | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |
| | | yesvaform | | | 1 One question | gatest1323@outlook.com | Jan 30, 2025 | Mar 21, 2025 | published | 4 | |
| | | Cancel_Declined form_simple | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |
| | | MVR_Decline1 | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |
| 1 | show | 10 | | | | 12345>> | | | | | |

Save to Library

The user can save a published form to the library. To save a published form to the library:

1. Navigate to the Actions tab and click the ellipsis (three dots) menu next to the published form.

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|----------|------|----------------------------------|------------|-------------------|-----------------------|-------------------------------|--------------|--------------|-----------|------------------|---------|
| · · | Show | ing 10 entries out of 416 | | | | | | | | Q Search | hΨ |
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| • | | New form | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 | Mar 27, 2025 | published | Save to Library | |
| | | Draft test | | | empty | qatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | Convert to Draft | |
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| | | yesvaform | | | 1 One question | qatest1323@outlook.com | Jan 30, 2025 | Mar 21, 2025 | published | 4 | |
| | | Cancel_Declined form_simple | | | empty | qatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |
| | | MVR_Decline1 | | | empty | qatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |

- 2. Select Save to Library from the dropdown options.
- 3. A confirmation popup appears with the message 'Form was successfully added to Library'.

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|------------|----|-----------------------------|------------|-------------------|------------------------------|-------------------------------|
| - | | ng 10 entries out of 416 | | | | |
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| | | new form | | | Test Form | testmailefeasibilty@gmail.com |
| * | | New form | | | Test Form | testmailefeasibilty@gmail.com |
| | | Draft test | | | empty | qatest1323@outlook.com |
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Convert to Draft

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The Convert to Draft option is available only when the form is published but has not yet been sent to any recipients.

Once the form has been published and sent, it can no longer be converted back to draft status.

- To convert a published form to draft, follow these steps:
 - 1. Navigate to the Actions tab and click the ellipsis (three dots) menu next to the published form.
 - 2. Select Convert to Draft from the dropdown options.

3. A confirmation popup appears, indicating that the form has been successfully converted to draft.

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| | | Title | Study Name | Organization | Type | Created By | Date Created | Date Updated | Status | Responses | Actions |
| | | new form | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 | Mar 27, 2025 | draft | 0 | - |
| • | | New form | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 | Mar 27, 2025 | published | Save to Library | - |
| | | Draft test | | | empty | gatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | Convert to Draft | - |
| * | | New form | | | empty | gatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | |
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| • | | yesvaform | | | 1 One question | gatest1323@outlook.com | jan 30, 2025 | Mar 21, 2025 | published | 4 | - |
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| | Show | 10 | | | < 1 2 | 34533 | | | | | ø |

Delete Form

The Delete Form option is enabled only when the form has not been sent to any recipients.

If the form has already been sent, the must first removes the recipients before deleting the form. To delete the Form, follow these steps:

Click the Forms icon on the left panel.

- 2. Click the **Refresh** icon in the bottom-right corner of the **General Forms** tab.
- 3. The most recent actions are reflected, and the form should now appear without any recipients.
- 4. Click the ellipsis (three dots menu) in the Actions tab for the form.
- 5. Select Delete Form.

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| | | Title | Study Name | Organization | Type | Created By | Date Created | Date Updated | Status | Responses | Actions |
| | ☆ | | | | | | | | | | |
| • | | New form | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 | Mar 27, 2025 | published | Save to Library | |
| | \$ | Draft test | | | empty | gatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | Convert to Draft | |
| | | New form | | | empty | gatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | Desete Form | - |
| | \$ | New Form | | | Acknowledge questions | testmailefeasibilty@gmail.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | |
| 06 | | test form rad | test study | test organization | empty | gatest1323@outlook.com | Jan 29, 2025 | Mar 24, 2025 | closed | 4 | |
| | \$ | Mvr1_simple | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |
| | | yesvaform | | | 1 One question | qatest1323@outlook.com | Jan 30, 2025 | Mar 21, 2025 | published | 4 | |
| | \$ | Cancel_Declined form_simple | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |
| | | MVR_Decline1 | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | published | 2 | |
| | Show | 10 | | | ≪ < 1 | 234533 | | | | | σ |

- 6. The Delete Form popup window appears.
- 7. Enter a reason for deletion in the required field (marked with an asterisk *).
- 8. Click Delete. The form is permanently deleted.

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| » | Gen | eral Forms Supplementary Forms | | | | | |
|---|---------|--------------------------------|------------|-------------------|----------------|--|--------------|
| | Showing | 10 entries out of 416 | | | | | |
| | | Title | Study Name | Organization | Туре | Created Ru | Date Created |
| ų | | new form | | | Test Form | Delete Form | Mar 27, 2025 |
| 1 | | New form | | | Test Form | O Deletion is final and the form cannot be restored once deleted | Mar 27, 2025 |
| | | Draft test | | | empty | Please provide the reason for deletion * | Mar 24, 2025 |
| | | New form | | | empty | Reason of deletion | Mar 24, 2025 |
| 1 | | New Form | | | Acknowledge qu | 00 | Mar 24, 2025 |
| : | | test form rad | test study | test organization | empty | | an 29, 2025 |
| 1 | | Mvr1_simple | | | empty | | Mar 21, 2025 |
| | | yesvaform | | | 1 One question | Cancel Delete | an 30, 2025 |
| | | Cancel_Declined form_simple | | | empty | qatest1323@outlook.com | Mar 21, 202 |
| 1 | | MVR_Decline1 | | | empty | gatest1323@outlook.com | Mar 21, 2025 |

6.1.10 Form Statistics Page

When a form is published, you are redirected to the Form Statistics page, which displays a complete overview of the form. To view this page, click on the specific published form.

The Form Statistics page includes the following functions:

- General
- Overview
- CDA
- eAcknowledgement
- Report
- Analyze Report
- Send
- Set Due Date

6.1.10.1 General

The **General** tab provides an overview of the form, including its type, creator, creation and update timestamps, and basic statistics like the number of responses and survey activity.

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|---|--|------------------------------|
| » | ☆ TPTEF-5422 Ø Set Due Date | |
| + | General Overview CDA eAcknowledgement Report Analyze | e Report |
| | The Preview 🕲 Edit form 🖂 Close Form 🛈 Enable CDA 🛈 Enable | le eAcknowledgement |
| • | About this Form | General settings |
| * | General Information | Restrict Duplicate Responses |
| | Type: 1 One question | Enable Sharing Link |
| • | Study: | Forward all notifications |
| _ | Organization: | Users * |
| | Instructions: | Add |
| | Description: | Save Notifications |
| | Created By: ovasilenko@ecisys.com | |
| | Date Created: 2025-04-01 15:29:07 | |
| | Date Updated: 2025-04-03 14:23:13 | |

10.1.1 Previewing a Published Form

The Preview provides an overview of the form, including all added questions and sections.

To Preview form, follow these steps:

- 1. Navigate to the General tab on the Forms Statistics page.
- 2. Click the **Preview icon** to open a preview of the form.



- 3. On the Preview page, you can:
- 4. Click the Save as PDF button to save the published form as a PDF.
- 5. Click the **Close button** at the bottom to cancel and exit the preview.

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|--------|-----------|-------------------|------------|--|
| * • | | VE | TPTEF-5422 | Serve and PS |
| 9 | | General | | |
| | | 1. FIRST QUESTION | AGCD | |
| * | | 2. FIRST QUESTION | | |
| | | 3. FIRST QUESTION | | |
| | | 4. FIRST QUESTION | | |
| | | 5.11 | | |
| | | | Cose | |

10.1.2 Restricting Duplicate Responses

When an email is sent to recipients, the newly added *Restrict Duplicate Responses* feature checks whether a recipient is already included in the mailing list. If so, it prevents the addition of duplicate entries.

Steps to Enable the Restrict Duplicate Responses, follow these steps:

- 1. Navigate to the Forms Overview screen.
- 2. Click on General tab and under the general settings.
- 3. Check the box labeled Restrict Duplicate Responses.
- 4. The Duplicate Responses window will pop-up with a message stating 'Duplicate Responses were restricted'.
- 5. To confirming that the setting is now active, click on **Ok** button.



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10.1.3 Form/Survey Responses

The Manager sends a survey to the submitter via an email link. When the submitter clicks the link, the form opens in their browser. Below is an example of a survey email.

| Reply Q | GeReply All GeForward Still | |
|--|---|---|
| | Wed 6/28/2023 5:18 PM | |
| N | NO_REPLY@trialinteractive.com | |
| 0 | New eFeasibility questionnaire request | |
| To | | |
| Suggested M | d Meetings + | Get more add-ins |
| Hello, | | |
| | | |
| We are Tria would like t | rial Interactive, a premier provider of eClinical Technologies and Services. We are conducting feasibility for one of our upcoming studies e to invite you to participate Here is a link to the questionnaire | and we |
| We are Tria would like t This link is u | rial Interactive, a premier provider of eClinical Technologies and Services. We are conducting feasibility for one of our upcoming studies the to invite you to participate Here is a link to the questionnaire is uniquely tied to this questionnaire and your email address. Please do not forward this message. | and we |
| We are Tria would like t This link is u If you have | rial Interactive, a premier provider of eClinical Technologies and Services. We are conducting feasibility for one of our upcoming studies e to invite you to participate there is a link to the questionnaire is uniquely tied to this questionnaire and your email address. Please do not forward this message. we any questions about the questionnaire or Trial Interactive please visit us at <u>www.trialinteractive.com</u> or e-mail us at <u>help@trialintera</u> | and we |
| We are Tria would like t This link is u If you have Thank you f | rial Interactive, a premier provider of eClinical Technologies and Services. We are conducting feasibility for one of our upcoming studies is to invite you to participate there is a link to the questionnaire is uniquely tied to this questionnaire and your email address. Please do not forward this message. we any questions about the questionnaire or Trial Interactive please visit us at <u>www.trialinteractive.com</u> or e-mail us at <u>help@trialintera</u> u for your participation! | and we |
| We are Tria would like t This link is u If you have Thank you f Sincerely, | rial Interactive, a premier provider of eClinical Technologies and Services. We are conducting feasibility for one of our upcoming studies at to invite you to participate there is a link to the questionnaire is uniquely tied to this questionnaire and your email address. Please do not forward this message. we any questions about the questionnaire or Trial Interactive please visit us at <u>www.trialInteractive.com</u> or e-mail us at <u>help@trialIntera</u> u for your participation! | and we |
| We are Tria would like t This link is u If you have Thank you f Sincerely, Trial Interac | rial Interactive, a premier provider of eClinical Technologies and Services. We are conducting feasibility for one of our upcoming studies is to invite you to participate there is a link to the questionnaire is uniquely tied to this questionnaire and your email address. Please do not forward this message. we any questions about the questionnaire or Trial Interactive please visit us at <u>www.trialInteractive.com</u> or e-mail us at <u>help@trialIntera</u> u for your participation! , ractive Team | and we |
| We are Tria would like t This link is u If you have Thank you f Sincerely, Trial Interac Links contai | rial Interactive, a premier provider of eClinical Technologies and Services. We are conducting feasibility for one of our upcoming studies is uniquely tied to this questionnaire and your email address. Please do not forward this message. we any questions about the questionnaire or Trial Interactive please visit us at <u>www.trialinteractive.com</u> or e-mail us at <u>help@trialintera</u> u for your participation! , ractive Team tained 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 known t | and we <u>ctive.com</u> threat is |

Once the submitter responds, the Manager can view the response under the Overview tab on the Form Statistics page.

| | IAL TERACTIVE 🔺 qa24 🗸 | | | | | | | | | | 7 | |
|----|---|----------------|--------------------|-----------------------|-------|--------------------|----------------------|---|-----------|----------------------|--------------------|----|
| » | ☆ TPTEF-5422 ⊘ Set Due Date | | | | | | | | | | | |
| + | General Overview CDA | eAcknowledgeme | ent Report Analyz | e Report | | | | | | | | |
| | Select 🗸 Selected Items 🗸 | 🛓 Export 🔄 🛓 | Import C Mass upda | te | | | | c | T Filters | Manage Co | olumns | |
| • | Showing 3 entries out of 3 Recipient ¢ | Last Updated 🌩 | Date Responded 🗢 | Response Status | Files | Integration Status | Supplementary Status | | Approving | Selected 0 Status | entries Actions | 0 |
| | ovasilenko@ecisys.com | Apr 1, 2025 | Apr 1, 2025 | Responded, viewed | N/A | 0 | N/A | | N/A | | | 1 |
| * | ovasilenko+2@ecisys.com | Apr 1, 2025 | Apr 1, 2025 | Responded, viewed | N/A | Q | Sent, no response 🔶 | | N/A | | | |
| | ovasilenko+1@ecisys.com | Apr 1, 2025 | Apr 1, 2025 | Responded, not viewed | N/A | Θ | N/A | | N/A | | | £. |
| 08 | Show 10 ¥ | | | | | | | | | | | 1 |
| m | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |

10.1.4 Closing a Form

Closing a form stops it from receiving responses and makes it unavailable for the survey. To close a form, follow these steps:

- 1. Navigate to the Form Statistics page and click the General tab.
- 2. Click Close Form.

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3. In the Close Form pop-up window, click Yes to confirm or no to cancel the action.

| CIN | TERACTIVE * 902 | 4 ¥ | | |
|-----|---------------------|-----------------------------|---|-----|
| | TPTEF-5410 © Set | Due Date | | |
| * | General Overview | CDA eAcknowledgement | Report Analyze Report | |
| ۵ | Preview Qitalit | form 🛛 🗐 Close Form 🗇 Enabl | ble CDA D Enable eAcknowledgement | |
| ۰ | About this Form | | General settings | |
| ** | General Information | | Close Form | |
| -08 | Type: | empty | O Are you sure you would like to stop receiving responses for this form? | |
| m | Organization: | | No Yes | Add |
| | | | Save Notifications | |
| | Created By: | ovasilenko@ecisys.com | | |
| | Date Created: | 2025-04-01 15:27:06 | | |
| | Date Updated | 2025-04-01 21:08:35 | | |

4. The **Email Template** pop-up window appears. Verify that the details in the template are correct, then click **Continue**.

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5. The form is now closed.

10.1.5 Reopening a Closed Form

Reopening a closed form allows it to start receiving responses again. **Note:** When a form is closed, the Send, Save Notifications, and Enable and Save buttons are not displayed, as you cannot send emails or receive responses while the form is closed.

To reopen a closed form, follow these steps:

- 1. Select the closed form you want to reopen.
- 2. On the Form Statistics page, click Reopen Form.

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| | IAL TERACTIVE \star qa24 👻 | |
|--------|---|------------------------------|
| * + | ☆ TPTEF-5410 General Overview CDA abcknowledgement Benort Anali | ura Bannt |
| | Preview ②Edit form E Reopen Form ①Enable CDA ①I | Enable eAcknowledgement |
| • | About this Form | General settings |
| * | General Information | Restrict Duplicate Responses |
| ~ | Type: empty | Enable Sharing Link |
| ~ | Study: | Forward all notifications |
| _ | Organization: | Users * |
| | Instructions: | A00 |
| | Description: | Save Notifications |
| | Created By: ovasilenko@ecisys.com | |
| | Date Created: 2025-04-01 15:27:06 | |
| | Date Updated: 2025-04-01 21:08:35 | |

3. The **Reopen Form** pop-up window is displayed.

4. Click Yes to confirm and reopen the form.

| GIN | NAL TERACTIVE | | | | |
|------------|---------------------|----------------------|---|----------|--|
| * | STPTEF-5410 | | | | |
| + | General Overview | CDA sAcknowled | igsment Report Analyze Report | | |
| | # Provine @Edit | form 🔅 Reopen For | m CD Erable CDA CD Enable eAcknowledgement | | |
| ٠ | About this Form | | Reopen Form | | |
| * | General Information | | Are you sure you would like to continue receiving responses for this form? | 1 | |
| | Type: | ampity | | | |
| ~ • | | | Yes No | | |
| m | Organization; | 3 | | <u> </u> | Contra Co |
| | Visitractions: | | | | |
| | Description: | | | | |
| | Created By: | owasilenko@eczys.com | | | |
| | Date Created. | 2025-04-01 15:27:06 | | | |
| | Date Updated | 2025-04-01 21:08:35 | | | |

10.1.6 Enabling Shared Link

Enabling a shared link allows you to share the survey with anyone—even if they are not an E-Feasibility user. When someone accesses the link, a new instance of the survey is created and sent to the intended recipient. When the recipient submits their response, the survey owner (manager) receives it. However, the person who shared the link will **not** be able to view the submitted response.

To Enabling shared link, follow these steps:

- 1. Navigate to the Form Statistics page and click the General tab.
- 2. Click the Enable Shared Link checkbox.

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- 3. A dialog box will appear, displaying a message 'Form Share Link was enabled'.
- 4. Click on Ok button, to enable and share the link with other contacts as needed.

10.1.7 Enable CDA

Clicking the Enable CDA button opens the Confidentiality Agreement Settings window, allowing the user to configure and activate the Confidentiality Disclosure Agreement (CDA) process for the selected form. In the Confidentiality Agreement Settings window, users can:

- Upload a CDA template file.
- Control the CDA delivery, choosing whether to send it only to recipients who do not have a CDA on file.
- Customize the Agreement Submission Page, etc. This topic is discussed in detail in <u>Confidentiality</u>
 <u>Disclosure Agreement (CDA)</u>.

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| | AL FERACTIVE * 9824 * | | | | |
|-------|---|--|--|--|--|
| * | TPTEF-5422 @ Set Due Date | | | | |
| Forms | General Overview CDA eAcknowledgement Report An | alyze Report | | | |
| | Preview DEdit form Close Form DEnable CDA | Enable eAcknowledgement | | | |
| • | About this Form | General settings | | | |
| * | General Information | Restrict Duplicate Responses | | | |
| 100 | Type: 1 One question | Enable Sharing Link | | | |
| ¢; | Study: | https://ef-stg.trialinteractive.net/free/share_survey/share_survey.html? site/draf1456428.2eda.da89.96a3.908531a236908.form/dx57fde16e.e1ed.de33. | | | |
| | Organization: | a833-b3b3544a37ac | | | |
| | Instructions: | | | | |
| | Description: | Forward all notifications | | | |
| | Created By: ovasilenko@ecisys.com | Users * | | | |
| | Date Created: 2025-04-01 15:29:07 | Add | | | |
| | Date Updated: 2025-04-14 11:26:11 | Save Notifications | | | |

10.1.8 Enable eAcknowledgement

The Enable eAcknowledgement is active once the form is sent, the sponsor will receive an email from the company containing a link to the **eAcknowledgement** section. The sponsor must click the link and review the provided information. To complete the process, the sponsor must electronically acknowledge the content by submitting the eAcknowledgement form.

To Enable eAcknowledgement, follow these steps:

1. Click the Enable eAcknowledgement button located in the form toolbar.

| General Overview CDA eAcknowledgement Report Preview Qt Edit form Close Form Denable CDA Denable eAcknowledgement General Information Type: 1 One question Study: Organization: Instructions: Description: Description: Description: Date Created by: ovasilenk0@exisys.com Date Created: 2025/04/01 15:29:07 General Infifications Users * Advance Date Created: 2025/04/01 15:29:07 General Infifications Description: Date Created: 2025/04/01 15:29:07 General Infifications Date Created: 2025/04/01 15:29:07 Advance Date Created: 2025/04/01 15:29:07 Advance Advance General Infifications Date Created: 2025/04/01 15:29:07 Advance Advance Advance Advance Advance Advance Advance Advance | TPTEF-5422 @ Set Due Date | |
|--|---|--|
| | General Overview CDA eAcknowledgement Report An | alyze Report |
| About this Form General settings General Information Image: Study: Stud | @ Preview 2 Edit form 🗟 Close Form @ Enable CDA | nable eAcknowledgement |
| General Information Image: Second | About this Form | General settings |
| Type: 1 One question Study: Interp://ef-sig.trainficre.trive.net/free/share_survey/share_ | General Information | Restrict Duplicate Responses |
| Study: https://d-sig trainteres/tame_survey/share_sur | Type: 1 One question | Enable Sharing Link |
| Organization: a833-6303544a37ac Instructions: Forward all notifications Description: Created By: ovasilenko@ecisys.com Users * Jobe Created: 20250401 15:2907 | Study: | https://ef-stg.trialinteractive.net/free/share_survey/share_survey.html? stelded1456428.2eda.4a89.96a3.908531a23690&formide57fde16e.e1ed.4e33 |
| Instructions: Description: Created By: ovasilenko@ecisys.com Date Created: 2025-04-01 15:29:07 Add | Organization: | a833-b3b3544a37ac |
| Description: Forward all notifications Created By: ovasilenko@ecisys.com Date Created: 2025-04-01 15:29:07 Add | instructions: | Forward all potifications |
| Created By: ovasilenko@ecisys.com Users.* Av Date Created: 2025-04-01 15:29:07 | Description: | Forward all notifications |
| Date Created: 2025-04-01 15:29:07 | Created By: ovasilenko@ecisys.com | Users * |
| | Date Created: 2025-04-01 15:29:07 | |

- 2. This action opens the Create eAcknowledgement popup window.
- 3. In the popup window, enter a **Title** for the eAcknowledgement.
- 4. Optionally, enter a Description to provide additional instructions or context for recipients.

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- 5. Click the **Create** button to save the acknowledgment. The saved eAcknowledgement window will open with a **Preview** option. If the configuration is complete, click the **Finish & Close** button.
- 6. The eAcknowledgement is now activated for the form, allowing electronic tracking of recipient acknowledgments.



10.1.9 Form Approving Mapping

The Form Approving Mapping schema defines the relationship between Questions and Contact Information. For detailed information on mapping, refer to the **Contact Configuration section**.

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To view and edit the Form Approving Mapping, follow these steps:

- 1. Select a form with a **Draft** status. The General tab is displayed by default.
- 2. Click the General tab.



- 3. On the right side of the screen, locate the **Form Approving Mapping** section to view its details and click on Edit fields to make the changes
- 4. The Form Approving Mapping section displays the mapping between Questions and Contact Information.

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| Form approving mapping | | Cancel Edit |
|---------------------------|----------------|-------------|
| TI User Login: * | | × |
| TI Room ID: * | 1 | • × |
| Investigative Site: * | FIRST QUESTION | ~ × |
| Principal Investigator: * | 11 | v ≈ |
| Site Number: | N/A | ~ x |
| Site Status Change Date: | N/A | ~ x |
| Contact First Name: | N/A | ~ × |
| Contact Last Name: | N/A | ~ × |
| | | |
| | | |
| | | |
| | | |
| Rese | Save | |

6.1.10.2 Overview

The **Overview** tab provides a centralized view of recipient responses and engagement for the selected form. It includes detailed status tracking, actions, and response statistics to support efficient monitoring and follow-up.

10.2.1 Actions on Forms (Overview)

Click the **Overview** tab on the **Form Statistics** page to view the form details.

| INTERACTIVE * 9824 * | | | | | | | | (?) | Ç9 | ۲ |
|---|----------------|-----------------------|-----------------------|-------|--------------------|------------------------|-----------|-------------------------------------|----|---|
| TPTEF-5422 @ Set Due Da | te | | | | | | | | | -41 Ser |
| General Overview CDA | eAcknowledgeme | ent Report Analyze | e Report | | | | | | | |
| Select V Selected Items V | ≜ Export L | Import 🛛 🕄 Mass updat | e | | | c | T Filters | Manage Columns | » | 0.000 |
| Snowing 3 entries out of 3 Recipient • | Last Updated 0 | Date Responded 0 | Response Status | Files | Integration Status | Supplementary Status 0 | Approving | Selected Dentries Status Actions | 0 | |
| ovasilenko@ecisys.com | Apr 1, 2025 | Apr 1, 2025 | Responded, viewed | N/A | • | N/A | N/A | | | |
| ovasilenko+1@ecisys.com | Apr 1, 2025 | Apr 1, 2025 | Responded, not viewed | N/A | 0 | N/A | N/A | | | |
| ovasilenko+2@ecisys.com | Apr 1, 2025 | Apr 1, 2025 | Responded, viewed | N/A | 0 | Sent, no response 🔶 | N/A | | | |
| | | | | | | | | | | Kethor reported K |

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The **Overview** section of a form is divided into the following areas:

- 1. Recipient, Date Filters, and Page List Located on the left side of the page.
- 2. Form Recipients Table and Dropdowns Displayed in the center of the page.
- 3. Responses Pie Chart Shown on the right side of the page.
- Form Recipients Table and Dropdowns Refer to the **Recipients** section for more information.
- Responses Pie Chart
- Refer to the **Pie Charts** section for detailed information. 4. Manage Columns – Displayed at top right corner.
 - Columns like Recipient, Last Updated, Response Status, and PI First Name are part of the Selected Column's list.
 - Users can recently add PI First Name, PI Last Name, Organization, and Country to the visible columns.

10.2.2 Select

The Select dropdown allows users to quickly filter and select recipients based on their response status.

- All Selects all listed recipients.
- Responded, viewed Selects only recipients who have responded and viewed the form.
- Responded, not viewed Selects recipients who responded but have not yet viewed the form.
- Sent, no response (Disabled in this view) For recipients who received the form but haven't responded.
- Declined Selects recipients who have declined.
- Deselect all Clears all current selections.



To use Select dropdown, follow these steps:

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Commented [AT1]: Needs to be updated for https://transperfect.aha.io/features/EF-172

Commented [JP2R1]: This has is explained in detail in Manage Columns.



- 1. Navigate to the **Overview** tab of the form.
- 2. Click the Select dropdown located above the Form Recipients table.
- 3. Choose one of the options based on the recipient response status:
- 4. Select All to include all recipients.
- 5. Select a specific status (e.g., Responded, viewed) to filter the list accordingly.
- 6. Select Deselect all. to clear all selections.
- Once selected, you can proceed with further actions (e.g., export, mass update) using the options in the toolbar.

10.2.3 Selected Item

The **Selected Items** dropdown allows users to perform actions on one or more selected recipients from the Form Recipients table.

- Export Export selected recipient data.
- Bulk Download Download files associated with selected recipients.
- Resend Resend the form to the selected recipients.
- Send Supplementary Form Send an additional form (if applicable).
- Resend to TMF Resubmit the form response to the Trial Master File system.
- Re-submit Reopen and allow re-submission of the form by the recipient.
 - Decline Manually mark the form as declined for the selected recipient.



Decline

The Manager and Submitter both can decline a survey if required. **Note:** All recipients of declined form receive a message about survey decline.

To decline a survey, follow these steps:

- 1. Open the required form and select the recipient from the Form Statistics page to whom the survey has been sent.
- 2. Click the Selected Items dropdown. A list of available actions will be displayed.

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| ☆ TPTEF-5422 | O Set Due Date | | | | | |
|---------------------|----------------------------|---------------|-----------------------|-----------------------|-------|-------------------|
| General O | verview CDA eAckn | owledgem | ent Report Analyz | e Report | | |
| Select 🗸 | Selected Items 🗸 🛃 Ex | port <u>1</u> | Import 🛛 🕄 Mass updat | te | | |
| Showing 3 entries o | Export > | | | | | |
| Recipient 🗢 | Bulk Download | ated 🗢 | Date Responded 🗘 | Response Status | Files | Integration State |
| ovasilenko@e | Resend | 025 | | Sent, no response | N/A | 8 |
| ovasilenko+2(| Send Supplementary Form | 25 | Apr 1, 2025 | Responded, viewed | N/A | Q |
| ovasilenko+1(| Resend to TMF Re-submit | 25 | Apr 1, 2025 | Responded, not viewed | N/A | Q |
| Show 10 | Decline | | | | | |

3. Select Decline. The Decline Form pop-up window will appear with the following sections:

- Recipient: Displays the name or email address of the survey recipient.
- Reason for Declining: A long text field to enter the reason for declining the form.
- 4. Click the Decline button. A Success dialog box will open, confirming that the form has been declined.



 Once the survey is declined, the recipient's Response Status in the table will update to Declined. The Date Responded column will display the date of decline after the page is refreshed.

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10.2.4 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 completed, a background job is triggered to process the import, and the system displays the progress of the **Survey Import**.

Note: Only .CSV and .XLSX file formats are supported. The system will display an error message if any other file format is uploaded.

To import the Survey, follow these steps:

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



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- 3. Click Upload to upload the source file. Refer to the screenshot below.
- Click Continue. The Imports Answers popup window is displayed that allows you to map the fields of E-Feasibility with the fields of the source file.



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

10.2.5 Export Form into CSV file

The **Export** allows users to download form data, including survey responses and status information, in **CSV** format to support easy analysis and recordkeeping. With this enhancement to the **Export Report**, users can now export **Supplementary Form** data in both **CSV** and **Excel** formats. This provides greater flexibility by allowing data export only the Supplementary Form data or separately from Main Form responses.

Steps to Export Form into CSV File, follow these steps:

- 1. Click the Import button from the Form Statistics page.
- 2. Click on the Export Button.
- 3. Configure Export Options, In the Export Form into CSV File dialog, Choose the type of forms to export. Supplementary or Main Form Supplementary.
- 4. Click the **OK** and Download the File.

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https://transperfect.aha.io/features/EF-178

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| G | RIAL ITERACTIVE 单 qa24 🐱 | | | | | 3 |
|----|--|---|----------|------------------------|-------------|--------------------------------------|
| > | TPTEF-5422 @ Set Due Date | | | | | |
| + | General Overview CDA eAckr | nowledgement Report Analyze Report | | | | |
| | Select 🗸 Selected Items 🗸 🔺 D | xport 🕹 import 😅 Mass update | | | C T Filters | III Manage Columns |
| • | Showing 3 entries out of 3 Recipient Last Up | Export Form Into CSV File | satus Si | opplementary Status 🌣 | Approving | Selected 0 entries Status Actions |
| | ovasilenko@ecisys.com Apr 14. | 2025 O Please, specify which forms you want to export: | N | (A | N/A | |
| 쓭 | ovasilenko+2@ecisys.com Apr 1.2 | 2025 | A R | esponded, not viewed 🔶 | N/A | |
| ~ | ovasilenko+1@ecisys.com Apr 1.2 | O Supplementary Main Form & Supplementary | N | (A | N/A | |
| ~~ | Show 10 ¥ | Information about sent surveys | | | | |
| m | | All information about sent forms Information by status | | | | |
| | | Select export columns V | | | | |
| | | Information about responses | | | | |
| | | All form responses Form responses not previously exported Form responses not previously viewed Form responses by date range Deport all sub-field values as separate columns | | | | |
| | | Export responded surveys for editing: | | | | |
| | | Export all responded surveys for editing Include surveys which have not submitted yet | ļ | | | |
| | | Cancel | _ | | | |

10.2.6 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
 - Message Status Ple Graph

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Form responses Pie Graph

This graph displays the percentage and number of forms with and without responses.

The user can hover your mouse over the graph to view the **exact count** and **percentage** of forms with and without responses.

Clicking a section of the pie chart detaches it and displays a table listing the forms corresponding to that response status.

Additionally, the user can click an item in the legend to exclude it from the graph's calculation.

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Message Status Pie Graph

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.

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

- Responded, Viewed.
- Responded, not viewed.
- Sent, no responses.
- Declined.

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10.2.7 Mass Update

The **Mass Update** functionality in Trial Interactive allows users to update multiple survey responses at once using an Excel or CSV file. This is particularly useful when bulk changes are required across several recipients or records, improving efficiency and consistency.

To perform a Mass Update, follow these steps:

- 1) Click the Mass Update button from the Form Statistics page.
- 2) Mass update responses window will pop up and In the Mass update responses window, click on the Upload file icon.
- 3) Provide a Reason for Updates, Check the box 'Send email notification to recipients' if want to inform them about the update.

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4) After all required fields are completed, the **Continue** button will be enabled.

5) Click **Continue** to execute the mass update.

| GI | RIAL ITERACTIVE 🌹 qa24 👻 | | |
|------------|---|--|--------------------------|
| » | TPTEF-5422 @ Set Due Date | | |
| * | General Overview CDA eA | cknowledgement Report Analyze Report | |
| ß | Select 🗸 Selected Items 🗸 🚺 | Export: 2 Import @ Mass update: | |
| | Showing 3 entries out of 3 Recipient ¢ Lat | Mass update responses | Supplementary Status |
| | ovasilenko@ecisys.com Ap | Please, select file for updating responses (Microsoft Excel or CSV) | N/A |
| * | ovasilenko+2@ecisys.com Ap | | Responded, not viewed -> |
| | ovasilenko+1@ecisys.com Ap | Testiny-export-testruns-eFeasibility-2.7_Round1-20250411_130146.xlsx | N/A |
| 0 8 | Show 10 👻 | Replace | |
| | | Reason For Updates * O Please provide the reason for updating net | |
| | | 9 🔊 | 6 |
| | | Send email notification to recipients | |
| | | Cancel Continue | |

10.2.8 Manage Columns

The Manage Columns allows users to customize which columns are displayed in their data grid. This helps streamline the view according to user preferences or reporting needs.

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To Manage Column, follow these steps:

- 1. Open the Manage Columns Panel, click on the Manage Columns option, available above the data grid in Overview tab.
- 2. View Available and Selected Columns, the screen is divided into two sections:
 - Available Columns: All columns that can be added to the grid.
 - Selected Columns: Columns currently displayed in the grid.
- 3. Select or Deselect Columns
 - Use the checkboxes in the Available Columns list to include or remove columns from the display.
 - In the example, PI First Name, PI Last Name, Organization, and Country have been selected and are now listed under Selected Columns.
- 4. Adjust Column Order
 - Use the Up (\uparrow) or Down (\downarrow) arrows next to the selected columns to rearrange their order.
 - To remove a column from the selected list, click the X icon next to it.
- Save the Configuration, after selecting and ordering the desired columns, click the Save Changes button at the bottom to apply the updates to the grid.

| Available Columns | Selected Columns | |
|-------------------------|----------------------|-----|
| Recipient | Recipient | © 0 |
| PI First Name | Last Updated | 00 |
| PI Last Name | Date Responded | 00 |
| Cast Updated | Response Status | 00 |
| Date Responded | Files | 00 |
| Response Status | Integration Status | 00 |
| Approving Status | Supplementary Status | 0.0 |
| Supplementary Status | Approving Status | 0.0 |
| eAcknowledgement Status | PI First Name | 0.0 |
| CDA Status | PLLast Name | 0.0 |
| Integration Status | Organization | 00 |
| CDA Update Date | Organization | 00 |
| eAcknowledgement Date | Country | 00 |
| Country | | |
| Organization | | |
| ✓ Files | | |
| Blockers | | |

6.1.10.3 CDA

A Confidential Disclosure Agreement **(CDA)** is a formal agreement established between the Sponsor or CRO and the Submitter during the site feasibility process. It ensures that both parties commit to maintaining confidentiality and refrain from disclosing any sensitive or proprietary information related to the study to third parties not involved in the project.

The CDA plays a crucial role in:

- Protecting the exchange of confidential information
- Ensuring regulatory compliance
- Maintaining data integrity and legal readiness before proceeding with site engagement or evaluation

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| | Report Analyze Report | | | |
|---------------------------------|-----------------------|---------------|-------------------------------|--|
| lect 🗸 Selected Items 🗸 🔳 Manaj | ge 📥 Export all | | C T Filters | » 0 m |
| Recipient | CDA Update Date | Status | Selected 0 entries Actions | 0 (00) B (00) |
| Hayas and unlighted com | Mar 24, 2025 | Countersigned | ۰ 4 | 0.000 |
| w 10 ~ | | | Table View Detailed Vie | W Signed Countersigned In Review Rejected Pending Verification Signature Needed |

In the system, a Manager can create a CDA by clicking the **CDA button** in the toolbar on the Form Statistics page of a published form. Once created, the CDA is attached to the email sent with the survey.

The Submitter can only complete and submit the survey after the CDA is signed by the Sponsor or CRO. Once the CDA is signed, the system sends a notification to the Submitter, enabling them to proceed with survey submission. CDA Functionalities Include:

- Creating and managing CDAs
- Enabling Digital Signature for CDA
- Integrating DocuSign for electronic signing
- Allowing Manual Verification for CDA completion

CDA (Confidential Disclosure Agreement) tab of a workflow. It shows the status and available actions related to CDA management for a recipient. Here's a breakdown of the new options under the Actions column, from left to right:

- 1. View (Eye icon) Allows users to view the existing CDA document and its details.
- 2. Download icon Enables users to download the CDA document.
- 3. Upload icon Allows users to upload a revised or completed CDA document.
- 4. Track (Green dot with arrow icon) Possibly used to track the status or activity of the CDA (e.g., if it was sent, viewed, or signed).
- 5. Copy icon Likely used to duplicate or clone the existing CDA information for reuse
- 6. Additionally, Status is shown indicating the CDA has been submitted and is currently being reviewed.

| RIAL TTERACTIVE 🍄 King's Landing 🛩 | | | (| D (O) | ٩ | |
|---------------------------------------|-------------------|-----------|-----------------------|-------|---------------------------------|------|
| 2 O Set Due | Date | | | | 4 | Send |
| General Overview CDA Synopsis Rep | rt Analyze Report | | | | | |
| Select V Selected Items V I Manage | Export all | | | c | ▼ Filters Selected 0 entries | >> |
| Recipient | CDA Update Date | Status | Actions | | | |
| .com | Mar 24, 2025 | In Review | ● <u>*</u> <u>*</u> - | | | |
| Show 10 V | | | | Table | View Detailed View | - |
| | | | | | | |
| | | | | | | |

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10.3.1 Creating CDA

To create CDA, follow these steps:

- 1. Select a published form, the Form Statistics page opens.
- 2. Click the General tab from the top toolbar of the Form Statistics page.
- 3. Click on the Enable CDA, the Confidentiality Agreement Settings dialog box opens.
- 4. Review the layout of the Confidentiality Agreement Settings dialog.
- The layout includes, a Main Settings tab on the top, General, E-Signature, and Verification tabs on the left.Sections for Agreement Template, Send CDA, Agreement Submission Page Text, and Verification in
- Progress Page Content.
- 6. In the Agreement Template section, click Upload File to upload a CDA document.
 - Once uploaded, the file name appears.
 - A blue up-arrow is displayed to allow file replacement.

Note: Only .doc or .docx file formats are supported.

| | AL TERACTIVE * qa24 * | | | () Č () 🔿 () testmalefeasibilit | y |
|----|--------------------------|--|-------------------------------|---|-----|
| > | | | Confidentiality Agreement Set | tings | |
| + | + | | Main Settings | | |
| | General Overview CD | A eAcknowledgement Repor GD Enable CDA | General Agreement Templat | 3 | j |
| • | About this Form | | E-Signature Verification | et BMBLECDAGOX | |
| | General Information | | Send CDA | those recipients where CDA is not on file | - 1 |
| 00 | Type: 1 On | e question | Agreement Submiss | ion Page Text | - 1 |
| | | | Descript | on: Page for collecting CDA from the recipient | _ |
| | I Instructions: | | Initial instructio | Please download, sign and submit a confidentiality agreement. Template of the agreement is available for download in this section. | |
| | | | | Once signed and scanned, the confidentiality agreement can be submitted in this section. | |
| | Date Created: 2025 | -04-09 11:12:20 | Oproad related to | | |
| | Date Updated: 2025 | -04-15 10:08:48 | Consent to | 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. | ÷ |
| | Statistic Information | Supplementary Statistic Information | Signature option rela | ted Please choose option for signing. | 1.0 |
| | | Answers: 0 | | at | |
| | Responded, viewed: 0 | Surveys sent: 0 | | Cancel Next | |
| | | Responded, not 0 | | | |

- 7. Scroll to the Agreement Submission Page Text section and fill in the following fields:
 - Initial Instruction.
 - Upload Related Text.
 - Consent Text.
 - Signature Option Related Text.
- 8. Configure the Verification in Progress Page Content section:
 - Enter the Description, Verification Header Text, and Verification Message Text.
 - Click **Preview** to view how this section appears to submitters while CDA is under review.
- 9. Under the e-Signature tab, choose one of the following signature methods:
 - Digital Signature Enabled by default.
 - DocuSign Available only if configured under Settings > E-Signature.

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| Confidential | ity Agreement Setting | 15 | |
|--------------|----------------------------------|---|---|
| | Main Settings | | |
| General | Agreement Submission F | Page Text | |
| E-Signature | Description: | Page for collecting CDA from the recipient | |
| Verification | Initial instructions: | Please download, sign and submit a confidentiality agreement. Template of the agreement is available for download in this section. | h |
| | Upload related text: | Once signed and scanned, the confidentiality agreement can be submitted in this section. | h |
| | 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. | h |
| | | Presiew | |
| | Verification In Progress | Page Content | |
| | Description: | Notification page for recipient, that his CDA is in progress | |
| | CDA verification header text: | Verification in progress | h |
| | | Cancel Next | |

- 10. Click Next to continue to E-Signature settings, the next screen displays:
 - Top tabs: Main Settings, Additional CDA Settings, General Settings, Verification Email, Signed CDA Reply, Manage Signers, and Notification for Signers.
- 11. Additional CDA Settings, allows user to Include Managers in to countersigning process for CDA and Allow user to view the survey while sponsor is in the process of signing the CDA.

| Confidential | ity Agreement Settings |
|--------------|---|
| ĺ | Additional CDA Settings General Settings Signed CDA Reply Manage Signers Notification for Signers |
| General | Include Managers in to countersigning process for CDA |
| E-Signature | © Yes ○ No |
| Verification | Allow user to view the survey while sponsor is in the process of signing the CDA |
| | © Yes ○ No |
| | |
| | Cancel Previous Not |
| | Cancel Previous NEX |

12. Click on Next button, display the General setting screen, allows user to manage CDA general settings.

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| Confidential | ty Agreement Settings |
|--------------|---|
| | Additional CDA Settings General Settings Signed CDA Reply Manage Signers Notification for Signers |
| General | Manage CDA general settings |
| E-Signature | List of default reasons for signature |
| Verification | Another |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | Cancel Previous Next |

13. Click on Next button, display the Signed CDA Reply screen, allows user to send signed reply email.

| Confidentia | lity Agreement 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 |
| Verification | Subject: Your signed copy of the agreement |
| | Normal - ਜੱ <u>∆</u> ·B / 및 듣 듣 ½, ⊮ 强 할 ≣ 풀 풀 & co.qb < ─ ↔ 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 link |
| | We recommend using Internet Explorer 10 or above, Chrome or Firefox browsers for viewing. |
| | If you have any questions about this file or Trial interactive please visit us at www.trialinteractive.com or e-mail us at help@trialinteractive.com |
| | Thank you for your participation! |
| | Sincorely, Trial interactive Team |
| | |
| | |
| | |
| | |
| | |
| | Cancel Previous Next |

14. Click on Next button, display Manage Signers screen, where user can select signers from available Signers.

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| | Additional CDA Settings General Settings Signed CDA Reply | igners Notification for Signers |
|------------|---|---------------------------------|
| | Manage Signers | |
| Signature | Available Signers | Selected Signers |
| rification | Search | Search |
| | Biotractageances | |
| | .com | |
| | ecisys.com | |
| | termination com | |
| | com mail.com | |
| | ansperfect.com | |
| | com | |
| | com | |
| | | |
| | | |

15. Click Next to proceed and it display Notification for signer's screen.

| Confidential | ity Agreement Settings |
|--------------|---|
| | Additional CDA Settings General Settings Signed CDA Reply Manage Signers Notification for Signers |
| General | Signers notification Email Template |
| E-Signature | Description: Email template to signer after investigator signed CDA |
| | Subject: S(recipientEmail) signed the confidentiality agreement! Log-in to review |
| Verification | Normal |
| | Hello, Dear \$(senderFirstName). |
| | S(recipientEmail) signed the confidentiality agreement for S(formTibe). |
| | In you would like to view this form, prease use this link. We recommend using Internet Explorer 10 or above. Chrome or Firefox browsers for viewing. |
| | If you have any questions about this file or Trial Interactive please visit us at www.trialinteractive.com or e-mail us at heip@trialinteractive.com |
| | Thank you for your participation! |
| | Sincerely. Trial Interactive Team |
| | |
| | |
| | |
| | Cancel Previous Next |

16. Click Next to Proceed and continue through the remaining Verification setting as needed.

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| Confidential | ity Agreement | Settings | | | | |
|--------------|---------------|----------------|----------------|------------------------|-----------------------------|-----|
| | Main Settings | Approved Email | Rejected Email | Manage Approvers | Review email template | |
| General | | | | | | |
| E-Signature | | | | | | |
| Verification | | | Manual ver | ification is Enabled | | |
| | | | Would you | like to Disable manual | verification of the agreeme | ıt? |
| | | | Disable | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | Cancel Dravid | Maxt | |
| | | | | Cancel Previo | Next | |

17. Click on Finish, once all setting is done.

10.3.2 Enabling DocuSign

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

To enable DocuSign, follow these steps:

- 1. From the **Main Settings** page under the **E-Signature** tab, select the DocuSign radio button to navigate to the DocuSign Settings page.
- 2. When the **DocuSign** option is selected, all pages previously visible under **Digital Signature** in the E-Signature tab are replaced with DocuSign-specific pages.

| Main Settings Additional CDA Settings General Please select the type of -e-signature that you would like E-signature O ligital Signature (Default) Verification O DocuSign |
|--|
| General Please select the type of -e-signature that you would like E Signature Digital Signature (Default) Verification Docusion |
| E-Signature Verification |
| |
| |
| Cancel Previous Next |

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Commented [AT5]: This is good.. We only need to talk about DocuSign



- 3. Click Next to proceed to the Additional CDA Settings page, which includes the following options:
 - a. Include Managers in the countersigning process for CDA select Yes or No using the radio buttons.
 b. Allow users to view the survey while the sponsor is signing the CDA select Yes or No using the radio buttons.

| Confidentia | lity Agreement Settings |
|--------------|---|
| | Additional CDA Settings General Settings Signed CDA Reply Manage Signers Notification for Signers |
| General | Include Managers in to countersigning process for CDA |
| E-Signature | Ø Yes ○ No |
| Verification | Allow user to view the survey while sponsor is in the process of signing the CDA |
| | ⊙ Yes ❷ N0 |
| | |
| | Cancel Previous Next |

- 4. Click **Next** to go to the **DocuSign Settings** page, which includes:
 - An Approver Email field marked with a red asterisk and a tooltip, allowing you to enter the approver's email for CDA approval.
 - A Subject field, also marked with a red asterisk and a tooltip. The default subject, CDA DocuSign signature needed, is editable.
 - Three action buttons Cancel, Previous, and Next.

| Confidentia | lity Agreement Settings |
|--------------|--|
| | Main Settings Additional CDA Settings DocuSign Settings |
| | Approver email: * |
| F.Signature | |
| E-signature | This should be the email of the application user with the manager access |
| Verification | Subject: |
| | CDA DocuSign signature needed |
| | O Subject is related to the DocuSign emails which are sent to the recipients on distributing CDA for signing |
| | |
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- 5. Click Next to navigate to the Manual Verification page.
- 6. Click Finish. You will be redirected to the Customize Your DocuSign Template page.
- 7. Drag and drop the **Signature** field from the **Standard Fields** section into the document's text area, then click **Proceed**.

| Test | demo01 06-23-20 | | | | ACTIONS ~ | PREVIEW |
|-------------|----------------------|----------------|---|----|-----------|---------------|
| signer | | | ්ට ෆී 129% ▼ | | | SHORTCO |
| learch Fie | ids | × | | | °∠ Sign | ature |
| Stand | ard Fields | Â | | | Recipier | e . |
| 1 5 | ignature | | | | o sig | ner v |
| DS P | vitial | | | | Peq | uired Field |
| 1 0 | ate Signed | | | | Formatti | ng |
| | | | ~~~~ | | Data Lat | el . |
| | mail | | This document is proprietary and is protected by U.S. and international copyright have and trade secret laws. Copyright 0 2017 | _ | Tooltip | |
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| Т 1 | tte | | names may be trademarks of their respective owners. | | | DELETE |
| | | w (| | • | | |
| | | | | 8/ | ACK SA | VE AND CLOSE |
| olsh (US) * | Contact Us Terms o | /Use Privacy | Intelectual Property Trust Copyright © 2023 Docufign, Inc. All rights reserved | _ | | |

8. You will be redirected to the Form Statistics page with the CDA tab displayed.

10.3.3 DocuSign Signing Process

- 1. The Manager sends a survey link to the submitter that includes the Confidentiality Agreement (CDA) as part of the survey.
- 2. When the submitter opens the link, the **Confidentiality Agreement** page loads in their browser.
- 3. The CDA tab appears on the left-hand side panel if a CDA is configured for the survey.
- 4. The submitter expands the Sign Electronically section, where two signing options are available:
 - Sign

Sign via SSO

- 5. The notification mail for signing CDA is sent to the approver added while creating CDA.
- 6. When the approver signs the CDA using DocuSign, the submitter gets a notification of CDA acceptance.
- 7. The submitter is now able to complete the survey provided in a link and submit it.

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| Adopt Your Signature | × |
|--|--|
| Confirm your name, initials, and signature. | |
| Full Name* | Initials* |
| an anna | |
| SELECT STYLE DRAW | Change Style |
| Docusigned by: 223D412944D1443 | |
| By selecting Adopt and Sign, I agree that the signature and initials will be the electronic repre my agent) use them on documents, including legally binding contracts - just the same as a p | sentation of my signature and initials for all purposes when I (or en-and-paper signature or initial. |
| ADOPT AND SIGN CANCEL | |

10.3.4 Enabling Manual Verification CDA

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

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| * | Sections » | n aity Agreement | |
|-----------------------|---------------|---|---|
| CDA Sign | | | |
| General Supporting | Documentation | Please download, sign and submit a confidentiality agreement. Template of the agreement is available for download in this section. | |
| | | Agreement File | |
| | | Agreement File | |
| | | 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 agree with the content and confirm that the confidentiality agreement I am about to submit has been signed by me. | |
| | | Decline Submit | |

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

| 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 and confirm that the confidentiality agreement I am about to submit has been signed by me. | |
| 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.

To enable Manual Verification:

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1. From the Manual Verification Page, click the Enable button.

| Confidentiality Agreement Settings | | |
|------------------------------------|--|--|
| Conidentiality Agreement Settings | | |
| Main Settings | | |
| General | | |
| E-Signature | | |
| | Manual verification is Disabled | |
| Verification | | |
| | Would you like to Enable manual verification of the agreement? | |
| | Enable | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | formal Decision Finish | |
| | Cancel Previous Finish | |

- 2. Once Enable is clicked, the button changes to Disable, and the following elements appear on the page:
- A set of pages displayed at the top: Main Settings, Approved Email, Rejected Email, Manage Approvers, and Review Email Template.
- A message stating: Manual Verification is Enabled. Would you like to disable manual verification of the
 agreement? along with a Disable button.
- 3. The **Cancel**, **Previous**, and **Next** buttons allow the user to navigate through the pages. Once all settings are completed, the user can click **Finish** to proceed.

| Confidential | ity Agreement Settings |
|--------------|---|
| | Main Settings Approved Email Rejected Email Manage Approvers Review email template |
| General | Review Email Template |
| E-Signature | Description: Notification email text to the CDA reviewer that a new CDA has been submitted. Subject: New CDA is ready for reviewing |
| | Normal · T· A· B / ⊻ i⊟ i⊟ x₂ x² ⊒ E E 至 ∃ * oo qó & - ↔ O Ø |
| | Dear \${senderEmail}, |
| | \$(encopientEmail) has submitted a CDA for \$formTitle). To review the CDA file, please use this link: \$formaty. Sincerety. |
| | THE INSPECTOR CONT |
| | |
| | |
| | |
| | Cancel Previous Finish |

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10.3.5 Viewing CDA

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

The CDA tab is divided into the following sections:

- 1. Includes Manage and Disable links located below the toolbar.
- 2. The left section provides:
 - Search Email textbox: This allows you to search for the recipient.
 - Status dropdown: This allows you to search for the CDA depending upon the status. The Status dropdown displays the options as below.
 - Page List dropdown: This allows you to manage the recipient's entries in a table.
 - Refresh icon: This allows you to reset all the changes to the form.
 - Download arrow: This allows you to export CDAs. Proceed to section Export CDA for detailed information.
- 3. The middle section: Displays a table showing the **Recipients**, the **Status** of each CDA, and the **Actions** that can be performed.
- 4. Right section: Shows Pie Charts representing the distribution of CDA statuses for visual summary.

| ☆ 123 O Set Due Date | | 4J Send |
|---|------------------|---|
| General Overview CDA Report Analyze Report | | |
| Select 🗸 Selected items 🗸 📰 Manage 🔺 Export all | | C Tilters > |
| Search Email: Q.Search | Status: All | 4 (50 ~ 4 (50 |
| Showing Tentries out of 1 | | Selected 0 entries |
| Recipient | Status | Actions |
| alinavictorovnapr@gmail.com | Signature Needed | |
| Show 10 V | | Table View Detailed View |
| | | Signed Foreiow Review Review Review Review Signature Needed |

10.3.6 Actions on CDA

When the submitter signs the CDA and sends it to the Manager for countersignature, the Manager receives an email notification and can also access and sign the CDA directly from the **CDA** tab. From this tab, the Manager can perform the following actions:

- Preview and Sign CDA.
- Sign CDA
- Export CDA

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| G | RIAL ITERACTIVE * qa24 ¥ | | | $\overline{\mathbf{O}}$ | Č, (*) |
|----|---|--------|---------|-----------------------------------|--|
| | ☆ TPTEF-5410 ◎ Set Due Date | | | | √d Send |
| • | General Overview CDA eAcknowledgement Report Analyze Report | | | | |
| Ð | Select V Selected Items V III Manage & Export all Snowing 0 envires out of 0 | | | C T Filters Selected 0 entries | » 4 000 4 000 |
| • | Recipient CDA Update Date | Status | Actions | 0 | 4 (20) 4 (20) |
| * | Show 10 V | | | Table View Detailed View | 0.00 |
| o; | | | | | Signed |
| | | | | | Countersigned In Review Rejected Output Deptime Varification |
| | | | | | Signature Needed by Manager Signature Needed by Site |
| | | | | | |
| | | | | | |

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.

| ☆ 123 O Set Due Date | | |
|---|------------------|----------------------------------|
| General Overview CDA Report Analyze Report | | |
| Select 🗸 Selected Items 🗸 🚍 Manage 🕹 Export all | | 2 T Filters |
| Showing 1 entries out of 1 | | Selected 0 entries |
| Recipient | Status | Actions |
| alinavictorovnapr@gmail.com | Signature Needed | |
| Show 10 V | | Table View Detailed View |

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.

| nonitoring test123 O Set Due Date | | | | ÿ Send |
|---|-----------|-------------------------|--------------------------|---|
| General Overview CDA Report Analyze Report | | | | |
| Select V Selected Items V III Manage & Export all | | | C T Filters | » |
| Recipient | Status | Actions | | 1 (379- |
| mkandhare@transperfect.com | Signed | Review CDA on Sign Page | | |
| | | R 2 C | | |
| sneha.jagavkar@transperfect.com | In Review | 🐱 🛓 🗗 🖻 | | 0.021 |
| Show 10 Y | | | Table View Detailed View | - Take |
| | | | | Signed In Review Rejected Pending Verification Signature Needed |

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



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| monitoring test123 Ø 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 (179- |
| mkandhare@transperfect.com | Signed | Sign CDA | | |
| sneha.jagavkar@transperfect.com | | • <u>R</u> 2 | | |
| sneha.jagavkar@transperfect.com | In Review | 👁 👱 🖻 🖻 | | * (D) • (D) |
| | | | Table View Detailed View | ×1 (120) |
| Show 10 ¥ | | | | Signed In Review Rejected Pending Verification Signature Needed |

Export CDA

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

| General | Overview CDA | Report A | nalyze Report | | |
|-------------------|------------------|----------|---------------|--------|---------|
| Select 🗸 | Selected Items 🗸 | 📰 Manage | 🛓 Export all | | |
| Showing 1 entries | out of 1 | | | | |
| Reci | ipient | | | Status | Actions |
| qa2 | +00@ecisys.com | | | Signed | ۲ |

10.3.7 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.

| | |
|------|------|
| | |
| | |
| | |

| ☆ 123 O Set Due Date | | | A Send |
|---|------------------|--------------------------|---|
| General Overview CDA Report Analyze Report | | | |
| Select V Selected Items V III Manage Leport all | | Selected 0 entries | » |
| Recipient | Status | Actions | 0 (0%) |
| alinavictorovnapr@gmail.com | Signature Needed | | |
| Show 10 V | | Table View Detailed View | 51 (100%) |
| | | | Signed In Review Rejected Pending Verification 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.

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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.

| GI | | /E 📌 qa24 ✔ | | | |
|----|--------|--|-----------------|--------|---------|
| » | | F-5410 Ø Set Due Date | | | |
| + | Genera | al Overview CDA eAcknowledgement Report Analyze Repo | rt | | |
| | Select | Selected Items ✓ Manage Export all | | | |
| ٠ | | CDA file name template | | Status | Actions |
| 쓭 | Show | Name Template: | Preview | | |
| 90 | | | | | |
| ▦ | | | | | |
| | | | | | |
| | | Available Components: Words Delimiter: Underscore | θ Υ | | |
| | | Survey title CDA status Recipient email Type of published form CDA file name Dat | e of CDA adding | | |
| | | | | | |
| | | | | | |
| | | Cancel Export | | | |

- 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.
- 5. Click the Preview icon from the Name template section to view the CDA file name template as per added components. Below is an example of CDA file name template preview.
- 6. Notice that the Preview icon changes its name from Preview to Edit Template and the CDA file name template is displayed as per the components added.

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| CDA file name template | | | |
|--|--------------------|---------------|---|
| Name Template: Signature Needed_Rater Questionnaire_123 | | Edit template |] |
| Available Components: | Words Delimiter: U | Jnderscore ~ | |
| 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:

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

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- 8. Below is an example showing difference between delimiters- Underscore, Whitespace and Dash from the list.
- 9. 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.

| Backgr | ound Jobs | | |
|-----------|---------------------------------|-----------|---|
| Export | t CDA | × | |
| Status: | 100% | Completed | |
| Start dat | e: 1 minute ago | | |
| Complet | ed date: 1 minute ago | | |
| total: 1 | failed: 0 succeed: 1 | | |
| Downlo | ad document 📥 | | |
| Send I | Form Emails | × | |
| Status: | 100% | Completed | |
| Start dat | e: 5 hours 16 minutes ago | | |
| Complet | ed date: 5 hours 16 minutes ago | | |
| total: 2 | failed: 0 succeed: 2 | | |
| Send I | Form Emails | × | |
| Status: | 100% | Completed | |
| Start dat | te: 5 hours 17 minutes ago | | * |
| | Close | | |

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

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

6.1.10.4 eAcknowledgement

The **eAcknowledgement** tab in Trial Interactive allows Sponsors or CROs to track and manage the electronic acknowledgment of documents by recipients during the feasibility or site selection process.

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The Enable eAcknowledgement is active once the form is sent, the sponsor will receive an email from the company containing a link to the **eAcknowledgement** section. The sponsor must click the link and review the provided information. To complete the process, the sponsor must electronically acknowledge the content by submitting the eAcknowledgement form.

| G | RIAL ITERACTIVE * qa24 * | | | 0 Č | testmailefeasibility 🗸 |
|-----|---|----------------------------|-------------|-----|-------------------------------------|
| * | TPTEF-5422 O Set Due Date | | | | <i>¶</i> Send |
| + | General Overview CDA eAcknowledge | ment Report Analyze Report | | | |
| ۵ | Preview eAcknowledgement | | | | |
| • | Showing 0 entries out of 0 Recipient | Status | Status Date | » | |
| * | Show 10 v | | | c | 100 |
| •\$ | | | | | |
| • | | | | | |
| | | | | | Accepted Declined No Response |
| | | | | | |
| | | | | | |
| | | | | | |

To Create eAcknowledgement, follow these steps:

1. Click the Enable eAcknowledgement button located in the form toolbar.

| | AL TERACTIVE 🙁 🚖 qa24 💙 | |
|--------|--|--|
| * + | New Form O Set Due Date | |
| | General Overview CDA eAcknowledgement Report Ana ® Preview | lyze Report Enable eXknowledgement nable eXknowledgement |
| • | About this Form | General settings |
| * | General Information | Restrict Duplicate Responses Enable Sharing Link |
| •\$ | Type: Acknowledge questions Study: | Forward all notifications |
| ⊞ | Organization: Instructions: | Users * Add |
| | Description: | Save Notifications |

- 2. This action opens the Create eAcknowledgement popup window.
- 3. In the popup window, enter a **Title** for the eAcknowledgement.
- 4. Optionally, enter a **Description** to provide additional instructions or context for recipients.

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 Click the Create button to save the acknowledgment. The saved eAcknowledgement window will open with a Preview option where the user can edit and add Topic from the top right corner. If the configuration is complete, click the Finish & Close button.

| | RIAL NTERACTIVE 📌 qa24 🗸 | ? | × |
|---|--------------------------------|-----|--|
| » | Title*: | | Create eAcknowledgement |
| + | Creating Demo eAcknowledgement | Q | Title*: |
| | Details: | O D | Protocol Title |
| | For Testing eAcknowledgement | | Details: |
| * | Cancel Update | , P | Normal → TI+ <u>A</u> + B / U ≟ ∷ x ₂ x ² ⊡ E E E E S ceo c¢o & - <> O |
| ~ | | | |
| ⊞ | Preview Finish & Close | | Add |

- 6. The eAcknowledgement is now activated for the form, allowing electronic tracking of recipient acknowledgments.
- 7. In the top right corner, click the **Send** button and add the recipients to whom you want to send the eAcknowledgement.

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| | Recipients: | "Insert techpionic set" | Email Configuration | | | |
|------------|-------------|-------------------------|---|--|--|----------------------|
| + | | | From (email address): | | | |
| B) | | | NO,REPLY | | @ trialinteractive.com | |
| | | | Email Subject: | | | |
| • | | | New efeasibility questionnaire request | | | |
| | | | Email Text. | | | |
| 쓭 | | | Normal \rightarrow if $\underline{\Delta} \in \mathbf{B}$ $\mathcal{J} = \bigcup_{i \in I} (\mathbf{x}_i - \mathbf{x}_i^2)$ | 3 E E I 3 * 00 00 & - * | 00* | |
| a£ | | | HERO | | | |
| 100 | | | We are Trial Interactive, a promier provider of eCa mote you to nanticipate litera to a participate of the second | scal Technologies and Services. We are con- | ducting feasibility for one of our upcoming studies i | and we would like to |
| 100 | | Se | ending emails | but email address. Picase do not forward the | n messape. | |
| | | 0 | Email statistics can be viewed under background jobs | e Trial Interactive please wait un at announce | instantine cant of 6-mail on all including interaction | |
| | | | insertions. To use an insertion, place cursor when | e you would like the insertion to happen, p | press on the insertion icon O and select a desire | d Insertion, |
| | | | Do you want to get notified when form respon Do you want to display form confirmation page | ses are received? 17 | | |
| | | | | Cancel Add attachment | and the second s | |

 The recipient will receive an email from NO_REPLY@trialinteractive.com. Click the link provided in the email.

| New eFeasibility questionnaire request | |
|---|---|
| NO,REPLY@trialinteractive.com To • Immunities the communities of the c | ← Reply ≪ Reply All → Forward Fri 4/18/2025 10:33 Al |
| 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 studies and we would like to invit guestionnaire | te you to participate. <u>Here is a link to the</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 <u>www.trialinteractive.com</u> or e-mail us at help@trialinteractive.com | |
| Thank you for your participation! | |
| Sincerely, Trial Interactive Team | |
| 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 known threat is found, you will no content is detected, you will see a warning. | t be able to proceed to the destination. If suspicious |

9. The **Terms and Conditions** page will open, displaying the summary and eAcknowledgement details. Review the information, then click the **Accept** button.

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| A Sections | » | | Terms And Conditions |
|---|--|----|----------------------|
| enkchowledgement General Supporting Documentation | Synopsis 1. Summary 2. Topic 3. Topic Section 2 Test Text | ₹. | |
| | | | ß |
| | | | Decline Areas |

10. Once the eAcknowledgement is accepted, a new window will open displaying the **form fields** for the recipient to complete

| لله Sections » | | eAcknowledgement Demo | Share Download Saved Decline |
|--------------------------|--------------------|-----------------------|------------------------------|
| eAcknowledgement 🗸 | General | | <u> </u> |
| Supporting Documentation | 1. Last Name | | |
| | | | |
| 16 | 2. Middle Name | | |
| | | | |
| | 3. First Name | | |
| | | | |
| | 4.Imail | | |
| | | | |
| | 5 Institution Name | | |
| | | | |
| | | 0% Naxt | |

11. Under the **eAcknowledgement** section, the recipient's name will appear, indicating that the eAcknowledgement has been successfully accepted.

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6.1.10.5 Report

Users can view form responses and related activities from the **Report** tab located on the **Form Statistics** page of an open survey.

The Reports section includes:

- Main Report
- Supplementary Report

| (🕯 in | TERACTIVE * qa24 * | | | | | | | | () () | testmailefeasibilty |
|------------|----------------------------|--------------------|--------------|-----------|-------------|----------------|----------------|----------------|----------------|--------------------------|
| * | TPTEF-5422 @ Set Due Date | | | | | | | | | 🐗 Send |
| • | General Overview CDA | eAcknowledgement R | eport Analys | te Report | | | | | | |
| Ð | Main Report Supplementary | Report | _ | | | | | | | |
| • | 0 | | | | | | | | | Q Search T |
| | Showing 2 entries out of 2 | | | | | | | | | Selected entries |
| | Recipient Email | Date responded | Score | Blockers | Attachments | FIRST QUESTION | FIRST QUESTION | FIRST QUESTION | FIRST QUESTION | € 11 |
| - 1 | ovasilenko+1@ecisys.com | Apr 1, 2025 | 0 | No | No | sdfsd | dgzdfg | zdfgzdf | SDFSDF | SDFSDGS |
| | ovasilenko+2@ecisys.com | Apr 1, 2025 | 0 | No | No | | | | | |
| с ; | | | | | | | | | | |

10.5.1 Main Report

The Main Report tab, accessible under the **Report** section of a Form, displays a summary of form submissions from survey recipients. It provides key insights into who has responded and includes important metadata associated with each response.

Export Report

allows users to export Main Form responses to CSV or Excel files.

Report Configuration

Clicking the **Gear** icon on the toolbar of the **Report Dashboard** opens the **Report Configuration** dialog box, which allows you to configure the report settings.

| General Overview CDA ekdonweldgement Report Main Room Supplementary Report | TPTEF-5422 O Set Due Date | | _ | | | | | | | ୟୀ Sen |
|--|----------------------------|--------------------|--------------|-----------|-------------|----------------|----------------|----------------|----------------|------------------|
| Date: Operating Report Operating Report | General Overview CDA | eAcknowledgement R | eport Analy: | ze Report | | | | | | |
| D D O O O O O O PERST QUESTION OF REST QUESTION OF | Main Report Supplementary | Report | | | | | | | | |
| Steam (Ferminiser) | | | | | | | | | | Q Search T |
| Ølsperier final Ølser regorded Ølser Øls | Showing 2 entries out of 2 | | | | | | | | | Selected entries |
| ovalimininka rije knjigovani kapit 2005 0 No ko subila digađaj zaligat 50500 50500 50500 povalimininka rije knjigovani kapit 2025 0 No ko 5000 10 v | Recipient Email | Date responded | Score | Blockers | Attachments | FIRST QUESTION | FIRST QUESTION | FIRST QUESTION | FIRST QUESTION | © 11 |
| ovulensko-žekcnyckom April.2025 0 No No Sow 13 v | ovasilenko+1@ecisys.com | Apr 1, 2025 | 0 | No | No | sdfsd | dgzdfg | zdfgzdf | SDFSDF | SDFSDGS |
| Show 10 v | | | | | | | | | | |
| | Show 10 Y | | | | | | | | | |
| | 10 - | | | | | | | | | ~ |

10.5.2 Supplementary Reports

The Supplementary Reports tab allow users to capture additional details and export questionnaire responses in **CSV** or **Excel** format. Users can select specific survey response data to evaluate **key performance indicators (KPIs)** based on their clinical requirements.

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The system also includes **built-in analytical capabilities** to support statistical analysis of quantifiable question types. **Open-ended questions**, such as those requiring comments or free-text responses, are excluded from these statistical evaluations.

| » | the TPTEF-5422 O Set Due Date different stand |
|-----|--|
| + | General Overview CDA eAcknowledgement Report Analyze Report |
| | Main Report Supplementary Report |
| • | [2] Export Supplementary |
| | Supplementary Form: MVR1_Supp |
| | Browing Terroris out of 1 Selected envires |
| | O Recipient Email O Date responded O Score O Blockers O Attachments O 2 O 223e |
| O\$ | Apr 14, 2025 0 No No |
| | |
| • | |

• Export Supplementary:

The export includes optional metadata such as the Form Title and Current Export Date, helping sponsors to maintain accurate records

Steps to Export the Supplementary Report, follow these steps:

- 1. Navigate to the **Report** tab within the selected form or record.
- 2. Click on the Supplementary Report sub-tab.
- 3. Select Export Supplementary to begin the export process.
- 4. In the **Export Form** popup:
 - Choose the file format as Simple comma-separated values.
 - Select the checkboxes to include Form Title and Current Export Date, if required.
- 5. Click Export to download the file.



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6.1.10.6 Analyze Report

This feature allows users to customize the view of the responses received for a form by selecting different chart types, including Bar, Column, Donut, and Pie.

To access this feature:

Navigate to the Forms tab in the left panel and click on the Analyze Report tab.

| | RIAL NTERACTIVE * qa24 * |
|----|---|
| » | General Information ② Set Due Date |
| | General Overview CDA eAcknowledgement Report Analyze Report |
| Ê | + Select Questions 🕹 Export All 🖍 Collapse All |
| ٠ | Please, add the questions for analyze |
| ** | |

Note: The Select default view for all questions checkbox enables users to choose a default chart type for displaying the graphical representation of responses across all questions.

To Analyze Report, follow these steps:

- 1. Select the Select Questions option to begin configuring the report.
- 2. Check the **Select All Questions** box to include all questions, and then choose any specific questions you want to include.

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| Report Configuration |
|---|
| Please, select what questions you want to add for review: Select All Questions |
| ✓ 3 Multiple Choice-Checkbox ✓ 4 Multiple Choice-Dropdown ✓ 5 Multiple Choice-Single Selection ✓ 6 Multiple Choice-Single Dropdown |
| Select default view for all questions Default View: Bar Column Donut Pie |
| Cancel |

- 3. Click **OK** to save your selection and close the window.
- 4. The report will now be configured based on your selected questions.
- 5. You can download the report or change the sequence order of the questions:
 - Select **Option 1** in the image to download the report.
 - Select **Option 2** to change the order of the questions.

| Site Feasibility O Set Due Date | | | st Send |
|--|--------------------|-----------|---------|
| General Overview CDA Report Analyze Report | | | |
| + Select Questions At Export All | | | R. |
| 9. Years of experience Set Donut Column Pie | | | ▲ 0 × 1 |
| Years of experience | PARTICIPANTS | QUANTITY | |
| | ANSWERED | 10 | |
| | SKIPPED | 0 | |
| | TOTAL | 10 | |
| Ansers | ANSWER CHOICES | RESPONDES | |
| | 0-5 Years | 6 | |
| | 6-10 Years | 3 | |
| | P 11-15 Years | 0 | |
| Tatal answer theory 10 | More than 15 Years | | |
| C-3 Years d 6-10 Years 11-15 Years Mins (hen 13 Years | TOTAL | 10 | 2 |
| 1. Therapeutic Area | | | ±o × |
| Therapeutic Area | PARTICIPANTS | QUANTITY | |
| 8 min | ANSWERED | | |
| 4.00 | SKIPPED | 2 | |

6. Click Save at the bottom to finalize and save the report.

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6.1.10.7 Send 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, follow these steps:

- 1. Open the Form to send for a Survey.
- 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.

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| Recipients: | insert incusems w | | |
| + B + c c | From panda address; Ho, KVV How I departs: And Adjents: And Adjents: And Adjents: Manual Adjents: Ma | subtractive con | plades and un vocal like to plades and un vocal like to plades and support |

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

Email Recipients

Recipients are **Contacts** to whom a Survey is sent.

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

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

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| TRIAL INTERACTIVE * 9/24 * | | () () () | (a) testmallefeasibility |
|-------------------------------|--|--|------------------------------|
| Recipients: | Insert Recipionis | | |
| House 2000 Brows House | From (email address): | | |
| The ris 2002 grant on | NO_REPLY | Ø trialinteractive.com | v |
| Another | Email Subject: | | |
| | New eFeasibility questionnaire request | | |
| | Email Text: | | |
| | Normal \rightarrow if Δ B / \underline{U} \models l \equiv x_{2} x^{2} | 3 E E Z 3 8 00 00 × - + 0 0 × | |
| | Hello. | | |
| | We are Trial interactive, a premier provider of eC invite you to participate. Here, is a link to the over | Inical Technologies and Services. We are conducting feasibility for one of our upcoming iccnuite | studies and we would like to |
| | This link is uniquely ted to this questionnaire and | your email address. Please do not forward this message. | |
| | If you have any questions about the questionnain | e or Trial Interactive please visit us at <u>www.inderineactive.com</u> or e-mail us at helo@mull | interactive.com |
| | Thank you for your participation# | | |
| | Sincerely, Trial interactive Team | | |
| | insertions: To use an insertion, place cursor whe | are you would like the insertion to happen, press on the insertion icon $oldsymbol{\Theta}$ and select i | a desired insertion. |
| | Do you want to get notified when form respo Do you want to display form confirmation pa | nses are received? ge? | |
| | | Cancel Add attachment Send | |

To Import contacts, follow these steps:

- 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.

| | RIAL ITERACTIVE 📌 ga24 🗸 | |
|---|-----------------------------|-------------------------------------|
| » | Recipients: | Insert Recipients 🗸 |
| • | 1learner2002@gmail.com | Import contact Existing contacts |
| | Another | |
| 쓥 | | |

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

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To add Existing Contacts, follow these steps:

- 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.



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

Email Address

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

Email Subject

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

Email Text

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

Additional Email Settings

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

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.

Attachments

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



6.1.10.8 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:

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

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|----------|----------------------------|---------------------|----------------|--|---|--|
| <u> </u> | TPTEF-541 | Set Due Date | | | | al Send |
| 1 | General | Set Due Date | | | | |
| | Select w | | Due Date: | Lands. | * | |
| • | Recipient | Configure Reminders | + Add Reminder | Reminder Email Template | | |
| * | ovasileriko ovasileriko | No Reminders | | Normal - if A - B / 1 1 日 N - 2 王 王 王 3 - 00 40 4 4 - 4 - 4 - 4 | | |
| 6, E | Show E | | | rea. Tests T | | Tarris |
| | ŀ | | Cancel | | | Calification of the second sec |

- 3. Click **Enable** to set the Due Date. The button changes its text to Disable and a message is displayed as shown below.
- 4. Click **Add Reminder button** to set reminder on Due Date or prior to Due Date. This enables the Reminder textbox in the Configure Reminder panel along with the following buttons:
 - **Remove**: The reminder is removed.
 - Edit: Allows to edit the reminder dates
 - **Disable**: The reminder is disable.
- 5. Click the Edit button next to the Remind on textbox to set/change the reminder for the Due Date.

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| et Due Date | | |
|-------------------------|---------------------|--|
| | Due Date: | Enable |
| Configure Reminders | + Add Reminder | Reminder Email Template |
| Remind on: Apr 16, 2025 | Remove Edit Disable | Normal - nT· <u>A</u> ·B/U∏E IE x₂ x³ ⊒ EE EE ⊒ S co cpb & |
| Remind on: Apr 16, 2025 | Remove Edit Disable | Helo, |
| Remind on: Apr 16, 2025 | Remove Edit Disable | We are Trail Interactive, a premier provider of eClinical Technologies and Services. We are conducting feasibility for one of our upcoming studies and we would like in online you to participate. <u>Here is a like the constronance</u> |
| | | Inis link is uniquely ted 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.thainteractive.com or e-mail us at heip@thainteractive.com Thank you for your participation! |
| | | Sincerety, Trial Interactive Team |
| | | |
| | Cancel | Finish |

- 6. The Edit button disappears and the Remind On dropdown enables which has following options:
 - Remind On: To set reminder on selected date.
 - **Remind before:** To set reminder prior to the Due Date.
- 7. Select the required option from the dropdown and set the reminder. Notice that for Reminder Before option, a scroll bar for the days enables.

| | Due Date: | Enable |
|----------------------------|---------------------|---|
| onfigure Reminders | + Add Reminder | Reminder Email Template |
| Remind on: Apr 16, 2025 | Remove Edit Disable | Normal - nT· <u>A</u> ·B/U i⊟ i≡ x ₂ x ² 30 EE EE 30 5° co opo 42 O 1 >> |
| nemendiant v Nya 10, 4.043 | | Helo, We are Trial Interactive, a premier product of Calinacia Rectinologies and Services. We are conduct teasability for one of our tepcoming studied or of Calinacia Rectinologies and Services. We are conduct the constructions the constructions This link is uniquely led to this questionnaire and your enail address. Please do not forward this terms and the construction of the mail and the construction of the studies the constructions where classifications can of enal and a the temperature calinacians where classifications can of enal and a construction of the studies the temperature terms and the construction of the studies the temperature calinacians the construction of the studies of the studies of the temperature calinacians the construction of the studies |
| | | |

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

6.1.11 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.

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To change Question Titles of a form, follow these steps:

1. Click a form that displays a 'Draft' status.

| Ge | neral Forms Supplementary F | orms | | | | | | | | |
|-------|-----------------------------|------------|--------------|-----------------------|--------------------------------|--------------|--------------|------------|-----------|--------|
| Shown | g 12 with the law of 421 | | | | | | | | Q, Search | т |
| | Title | Study Name | Organization | Type | Created By | Date Created | Date Updated | Status | Responses | Action |
| | abed | | | Monitoring Visit Form | testmallefeasibilty@gmail.com | Apr 16, 2025 | Apr 16, 2025 | draft | 0 | - |
| | TPTEF-5410 | | | empty | ovasiler&o@ecisys.com | Apr 1, 2025 | Apr 16, 2025 | published | | |
| | New Form | | | Acknowledge questions | testmalefeasibiltysligmail.com | Mar 24, 2025 | Apr 16, 2025 | published. | 0 | |
| | TPTEF-5422 | | | 1 One question | ovasilenko@ecisys.com | Apr 1. 2025 | Apr 16, 2025 | published | 2 | |
| | eAcknowlwdgement demo | | | 1 One question | testq7301@gmail.com | Apr 9. 2025 | Apr 15. 2025 | published | 0 | *** |
| | synopsis test | | | 1 One question | gatest1323@outlook.com | Apr 9, 2025 | Apr 9, 2025 | published | 0 | *** |
| | new form | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 | Apr 7, 2025 | published | 0 | *** |
| | New form | | | Test Form | testmalefeasibilty@gmail.com | Mar 27, 2025 | Mar 27, 2025 | published | 0 | *** |
| | Draft test | | | empty | gatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | |
| | New form | | | empty | gatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | |
| 12.7 | | | | | | | | | | 1 |

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

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|--------|-----------------------------|--|-----------------------|
| * + | | abcd | Menitoring Visit Form |
| ₿ | | | |
| ٠ | Select / Deselect All | | · . |
| * | General | | ନ ତ ତ × |
| « | 1. Protocol ID | ∿_Question Edit Question: * | € (0 0 × |
| | | Question type: | |
| | 2. Indication | Tant Field Content restriction: No Restriction | - С С О О Х С |
| | | Answer options | |
| | 3. Investigator Product | Another | × 4 6 0 0 × |
| | | Category Make required | |
| | 4. Visit Date | Hidden question Answer choices must be the same | Ø2 Ø ♥ ♥ × |
| | | Cancel Library Update | |

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

6.2 Supplementary Forms

Supplementary Forms are forms associated with a General Form. To view both General and Supplementary Forms, click the Forms icon. These forms will be displayed in the grid at the center of the screen. Additionally, users can save a form as a PDF, if needed.

Users can perform the following actions on a Supplementary Form:

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- Create
- Approve
- Reject
- Submit

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.

6.2.1 Create a New Supplementary Form

The **Supplementary Forms** tab displays additional or supporting forms that are linked to primary forms within the system.

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

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

| G | RIAL NTERACTIVE * qa24 * | |
|----|-----------------------------|--|
| × | Create new form | |
| | | |
| e | | Crasta Drem Evision Enem |
| • | Title* | e com non course rom |
| * | Type* | Supplementary Forms 👻 |
| oç | | Preview available System Generated Questions for selected type |
| | Study | |
| | Organization | |
| | Instructions | |
| | | |
| | | |
| | | Continue |

- 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.
- 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.
- 8. Select the Supplementary Form radio button in the Publish Form.

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|---|---|-------------------------|
| | Demo | Supplamentary Forms |
| and and and a second | | <u> </u> |
| Select / Desilect All | Publish Form? | |
| Seneral . | Once you Publish the form, it cannot be edited further. Please confirm that you would like to | |
| og 🔲 1. what are clinical triats? | publich the form. Form type: | \$1 € 0 0 × |
| Once that per recent that it makes marked surgest or Development for second reputper. | Simple form. Supplementary form. Monstrolling Wall form. | |
| 2. Middle Name | Anonymous form. | A O O X |
| | Additional options: | |
| | Save form to the library. | |
| I First Name | Cancel Publish | @ 2 0 0 x |
| | | |

9. Supplementary Form pop up window. Click Yes in the Supplementary Form popup window.

| | RAL TERACTIVE * 9a24 ~ | | |
|--------|---|--|---------------------|
| * + | C TRIAL INTERACTIVE | Demo | Supplementary Forms |
| | | | |
| ٠ | Select / Deselect All | | |
| * | General | | |
| og | 1. what are clinical trials? | | |
| | Clinical trials are research studies that test a medical, surgical, or behavioral intervention is people.1 | Supplementary Form C Are you sure you would like to publish form as Supplementary? | |
| | 2. Middle Name | No | |
| | | | |

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

| INTERA | CTIVE 🔺 qa24 🐱 | | | | | | Ō | 2 (a) testmaile | leasibilty |
|---------|---------------------------------------|------------|--------------|---------------------|---------------------------------|--------------|--------------|-----------------|------------|
| Gen | eral Forms Supplementary Forms | | | | | | | | |
| Shawing | g 10 entries out of 68 | | | | | | | Q, Se | arch |
| | Title | Study Name | Organization | Туре | Created By | Date Created | Date Updated | Parent Form | Acti |
| ۲ | Demo | | | Supplementary Forms | international international com | Apr 16, 2025 | Apr 16, 2025 | 0 | |
| ۲ | MVR1_Supp | | | empty | .com | Mar 21, 2025 | Apr 14, 2025 | 3 | - |
| ۲ | CancelDeclinedMVF_Supp | | | empty | e.com | Mar 21, 2025 | Mar 21, 2025 | 2 | |
| ۲ | MVR_Decline_supp | | | 1 One question | Lom | Mar 21, 2025 | Mar 21, 2025 | 2 | |
| ۲ | AttachementSuppFormRecurringForm_supp | | | empty | k.com | Mar 21, 2025 | Mar 21, 2025 | 2 | |
| ۲ | Supp_Add attachment | | | 1 One question | .com | Mar 21, 2025 | Mar 21, 2025 | 2 | |
| ۲ | DeclineWithoutReasonSuppForm_rec | | | empty | Lcom | Mar 21, 2025 | Mar 21, 2025 | 2 | |
| ۲ | Rec1_decline_supp | | | empty | see a com | Mar 21, 2025 | Mar 21, 2025 | 2 | |
| ۲ | CancelDecline_SuppForm_rec | | | empty | .com | Mar 21, 2025 | Mar 21, 2025 | 2 | |
| | | | | 1 One martine | | Mar 21, 2025 | Mar 21, 2025 | 2 | |

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6.2.2 Change Type to Supplementary Form of a Drafted 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.

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|----------------|-----------------------------|---------------------|--------------|-----------------------|--------------------------------|--------------|--------------|-----------|-----------|-------|
| » | General Forms | Supplementary Forms | | | | | | | | |
| + | Showing 10 entries out of 4 | 1 | | | | | | | Q Sea | irch |
| B | Title | Study Name | Organization | Type | Created By | Date Created | Date Updated | Status | Responses | A |
| | 🕸 abod | | | Monitoring Visit Form | testmaliefeasibilty@gmail.com | Apr 16, 2025 | Apr 16, 2025 | draft | 0 | |
| • | ☆ TPTEF-5410 | | | empty | ovasilenko@ecisys.com | Apr 1, 2025 | Apr 16, 2025 | published | 3 | |
| | 2 New Form | | | Acknowledge questions | testmailefeasibilty@gmail.com | Mar 24, 2025 | Apr 16, 2025 | published | 0 | |
| ÷ | TPTEF-5422 | | | 1 One question | ovasilenko@ecisys.com | Apr 1, 2025 | Apr 16, 2025 | published | 2 | |
| | eAcknowlwdge | ment demo | | 1 One question | testq7301@gmail.com | Apr 9, 2025 | Apr 15, 2025 | published | 0 | |
| O ^C | 🕸 synopsis test | | | 1 One question | qatest1323@outlook.com | Apr 9, 2025 | Apr 9, 2025 | published | 0 | |
| | 🕸 new form | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 | Apr 7, 2025 | published | 0 | |
| | 1 New form | | | Test Form | testmallefeasibility@gmail.com | Mar 27, 2025 | Mar 27, 2025 | published | 0 | |
| | 🕸 Draft test | | | empty | qatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | |
| | 🕸 New form | | | empty | qatest1323@outlook.com | Mar 24, 2025 | Mar 24, 2025 | published | 0 | |
| | Show 10 ¥ | | | | « < 1 2 3 4 5 > » | | | | | |

- 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.

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|---------------|---|---------|---|-------|-----------------------|----|-----|
| Study: | | | | | Ø | | |
| Type: | Monitoring Visit Form | | | ~ | 8 | | |
| Organization: | 1 One question 3 All types - all required Acknowledge questions empty Monitoring Visit Form Multiple Choice Name2 name_2 New Supplementary Forr | n title | | | ✓ | ×× | Î |
| | Q&A rad ty Rater Questionnaire Regression2.7 Site Feasibility Supplementary Forms | | | | O | × | |
| | Test Form Test1 Testing 123 | | | j u V | Ø | × | |

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

6.2.3 Approve or Reject a Supplementary Form

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

- 1. Select a user/recipient that displays the status **Responded**, **Viewed** in the Response Status column.
- 2. The form opens in a new tab with the options Close, Reject and Approve buttons at the bottom of the screen.

| 2 Documentation O Set Due | Documentation O Set Due Date | | | | | | | | | | |
|--|--|------------------|-------------------|------------------|----------------------|--|-------|-------------------|---|--|--|
| General Overview CDA Report Analyze Report | | | | | | | | | | | |
| Select 🗸 Selected Items 🗸 | Select V Selected Items V & Export & Import @Mass update @ T Filters | | | | | | | elect columns | | | |
| Showing 1 entries out of 1 | | | | | | | 54 | elected 1 entries | 0 | | |
| 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 | | | | |

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- 3. Click the **Edit Response** button displayed at the top right corner to enable the fields for entering your responses.
- 4. Notice that the Edit Response button is changed to Update Response button.
- 5. Enter the required answers in the fields and click **Update Response** button displayed at the top right corner.

| | ctive | | Documentation | (| Send Supplementary | Edit Response | Save as PDF |
|-----------|------------------------|------------------|----------------|--------|--------------------|---------------|-------------|
| Main Form | | | | | | | - |
| | 1. Last Name | | | | | | i |
| | | qa2+1@ecisys.com | | | | | |
| | 2. Middle Name | | | | | | |
| | | | | | | | |
| | 3. First Name | | | | | | |
| | 4. Email | | | | | | |
| | 5. Institution Name | | | | | | |
| | 6. Institution Address | | | | | | |
| | 7. Institution Address | | | | | | |
| | | | Close Reject 2 | pprove | | | |

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

- 8. A popup window is displayed The responses are updated and the updated responses are reflected in the form. Refer to the screenshot below.
- 9. Click the **Approve** or **Reject** button as required displayed at the bottom of the screen.

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| 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. Click **OK** in the Approving Site popup window.
- 11. A notification is displayed Survey has been approved.
- 12. 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.

| Documentation O Set Due Date | | | | | | | | | | | |
|------------------------------|--------------------|--------------------|-------------------|------------------|----------------------|------------------|------------------|--|--|--|--|
| Seneral Overview CDA | Report Analyze Rep | ort | | | | | | | | | |
| Select 🗸 Selected Items 🗸 | ≛ Export _≛ Impo | rt 🛛 🎗 Mass update | | | e | T Filters | Select colum | | | | |
| owing 1 entries out of 1 | | | | | | | Selected 0 entri | | | | |
| Recipient 🌣 | Last Updated 🌻 | Date Responded © | Response Status | Approving Status | Supplementary Status | F | iles Actions | | | | |
| qa2+1@ecisys.com | Jul 7, 2023 | Jul 7, 2023 | Responded, viewed | Approved | N/A | N | I/A | | | | |

6.2.4 Edit Supplementary Form from Actions

To Edit Supplementary Form, follow these steps:

- 1. Click the three dots (ellipsis) displayed in the action's 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.

| G | RIAL | CTIVE da24 👻 | | | | | | • | Č 🔍 |
|----|---------|---------------------------------------|------------|--------------|---------------------|------------------------------|--------------|--------------|-------------------------|
| | Gene | eral Forms Supplementary Forms | | | | | | | |
| | Stowing | 10 erones out of 68 | | | | | | | Q Search |
| | | Title | Study Name | Organization | Type | Created By | Date Created | Date Updated | Parent Form A |
| | • | | | | Supplementary Forms | testmallefeasibity@gmail.com | | | |
| • | ۲ | MVR1_Supp | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Apr 14, 2025 | Edit Supplementary Form |
| | ۲ | CancelDeclinedMVF_Supp | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | Delete Form |
| | ۲ | MVR_Decline_supp | | | 1 One question | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | 2 |
| | ۲ | AttachementSuppFormRecurringForm_supp | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | 2 |
| ¢; | ۲ | Supp_Add attachment | | | 1 One question | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | 2 |
| | ۲ | DeclineWithoutReasonSuppForm_rec | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | 2 |
| | ۲ | Rec1_decline_supp | | | empty | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | 2 |
| | ۲ | CancelDecline_SuppForm_rec | | | empty | gatest1323iBoutlook.com | Mar 21, 2025 | Mar 21, 2025 | 2 |
| | ۲ | \$2,1 | | | 1 One question | gatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | 2 |
| | Show | 10 👻 | | | « < 1 2 | 14533 | | | |

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.

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|--------|--|------|-------------------------------------|--------------|------------|-----------|--------|
| * + | Tee: Demo | Cor. | Study: Type: Supp ganization: | lementary Fi | orms | | |
| B | Create Question Create Section | | | | | | |
| • | General | | | | & B | • • | × |
| * | 1. what are clinical trials? | | | | 2 (| 0 | × |
| ¢ | Clinical Inside are research studies that test a medical, surgical, or behavioral intervention in people. : | | | | | | |
| • | | | | | 0.0.0 | | |
| | 2. Middle Name | | | | 0.04.6 | 00 | × |
| | 3. First Name | | | | 280 | 0 | × |
| | | | | | | | |

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

6.2.5 Delete supplementary Form from Actions

To Delete Supplementary Form, follow these steps:

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

| l |) II | RIAL ITERA | CTIVE 📌 qa24 🐱 | | | | | | () | 🔊 🝙 testmailefeasibilt |
|---|------|---------------|---------------------------------------|------------|--------------|----------------|------------------------|--------------|--------------|-------------------------|
| | * | Ger | neral Forms Supplementary Forms | | | | | | | |
| 1 | 1 | Showing | g 10 entries out of 68 | | | | | | | Q Search |
| E | 3 | | Title | Study Name | Organization | Туре | Created By | Date Created | Date Updated | Parent Form |
| | | ۲ | | | | | | | | |
| | | ۲ | MVR1_Supp | | | empty | qatest1323@outlook.com | Mar 21, 2025 | Apr 14, 2025 | Edit Supplementary Form |
| | | ۲ | CancelDeclinedMVF_Supp | | | empty | qatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | Delete Form |
| 1 | | ۲ | MVR_Decline_supp | | | 1 One question | qatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | 2 |
| | | ۲ | AttachementSuppFormRecurringForm_supp | | | empty | qatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | 2 |
| • | × | ۲ | Supp_Add attachment | | | 1 One question | qatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | 2 |
| | | ۲ | DeclineWithoutReasonSuppForm_rec | | | empty | qatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | 2 |
| 6 | | ۲ | Rec1_decline_supp | | | empty | qatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | 2 |
| | | ۲ | CancelDecline_SuppForm_rec | | | empty | qatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | 2 |
| | | ۲ | \$2_f | | | 1 One question | qatest1323@outlook.com | Mar 21, 2025 | Mar 21, 2025 | 2 |
| | | Show | 10 - | | | < < 1 2 | 2345>> | | | |

- 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** and the form is deleted.

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|----|------------------------------|---------------------------------------|-------------|--------------|---|------------------------|--------------|--|--|--|--|--|
| * | Gene | eral Forms Supplementary Forms | | | | | | | | | | |
| | Proving 10 entries out of 60 | | | | | | | | | | | |
| | | Title | Study Name | Organization | Туре | Created By | Date Created | | | | | |
| | ۲ | Demo | | | Supplementary Forms | Delete Supplementary | 6, 2025 | | | | | |
| • | ۲ | MVR1_Supp | | | empty | | 1, 2025 | | | | | |
| | ۲ | CancelDeclinedMVF_Supp | empty empty | | Are you sure you would like to delete supplementary Form? | 1, 2025 | | | | | | |
| | ۲ | MVR_Decline_supp | | | | | 1, 2025 | | | | | |
| | ۲ | AttachementSuppFormRecurringForm_supp | | | empty | Cancel Delete | 1, 2025 | | | | | |
| | ۲ | Supp_Add attachment | | | 1 One question | qatest1323@outlook.com | Mar 21, 2025 | | | | | |
| | ۲ | DeclineWithoutReasonSuppForm_rec | | | empty | qatest1323@outlook.com | Mar 21, 2025 | | | | | |
| | ۲ | Rec1_decline_supp | | | empty | qatest1323@outlook.com | Mar 21, 2025 | | | | | |
| | ۲ | CancelDecline_SuppForm_rec | | | empty | qatest1323@outlook.com | Mar 21, 2025 | | | | | |
| | ۲ | | | | 1 One question | qatest1323@outlook.com | Mar 21, 2025 | | | | | |
| | Show | 10 - | | | « ‹ | 12345>> | | | | | | |

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

6.2.6 Creating from Existing Supplementary Form

To Create from Existing Supplementary Form, follow these steps:

- 1. Open a required project, from the project dropdown, available at the top.
- 2. Click the **New Form** from the left side Menu Bar.
- 3. Select the checkbox of Create from Existing Form displayed at the top of the new form.
- 4. Click the Search button to open the form Search popup window.
- 5. 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.

| Create new for | n | | | | | | | |
|----------------|--------------|--|------------------------------|-----------------|-----------|--------------|----------|--------|
| | | | | | | | | |
| | | | | | | | | |
| | | Charte From Suithing From | | | | | | |
| | | Create Hom Extend Form | | | | | | |
| | Search exist | ting form New form | Q. Search | | | | | |
| | Form Sea | rch | | | | | | |
| | 1 | | | | | | | |
| | | Q.Search | Choose form type | ♥ Date Created: | | to: | | |
| | | | Choose form type | | | | | |
| | (hereited) | August 4 4 4 19 | 1 One question | | | | Articor | |
| | Varia | Title | Acknowledge questions | Organization | Type | Date Created | Comments | Delete |
| | | Newform | emply | organization | Test Form | Apr 1, 2025 | Commence | × |
| | | Newform | Monitoring Visit Form | | Test Form | Apr 1, 2025 | | |
| | | sect | Multiple Choice | | emote | Mar 18, 2025 | | * |
| | | Manner/Duestions for Contact/Configure | name_2 | | empty | Mar 17, 2025 | | × |
| | | Allsh drinke Questions | New Supplementary Form title | | emphy | Mar 14, 2025 | | * |
| | | ArimoniariaeDanBrefix | Newformtype14082024 | | empty | Mar 10, 2025 | | * |
| | | Acimowiedge | rad ty | | empty | Mar 10, 2025 | G | × |
| | | new form 7509 | Rater Questionnaire | | emoty | Mar 4, 2025 | | × |
| | | Teatformauto | Regression2.7 | | emoty | Mar 4, 2025 | | × |
| | | Testformauto | Supplementary Forms | | emoty | lap 29, 2025 | | × |
| | | | Test Form | | | | | |
| | | | Test1 | # 4113 B | | | | ~ |

6. Click Add Selected. The selected form is displayed in the Search Existing Form field.

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| arch existing form | New form | Q Search | | | | |
|-----------------------|------------------|---------------------|-------------------|----------|-----------|--|
| rm Search | | | | | | |
| | Q Search | Supplementary Forms | Date Created: | to: | m | |
| Showing 0 entries out | of 0 | | | | Actions 🗸 | |
| View | Title Study Name | Organization | Type Date Created | Comments | Delete | |
| Show 10 v | | | | | ø | |
| Show 10 v | | | | | c | |

6.2.7 Delete Supplementary Form attached to a Parent Form

To Delete Supplementary Form attached to a Parent Form, follow these steps:

- 1. Select a form the that displays Published status under Forms. 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.

| G | RIAL NTERACTIVE 🔶 da24 🐱 | | | | | | 0 |
|------------|---|--------------------|----------------------|-----------------------|--------------------------|------------------|----------------------|
| New Form | TPTEF-5410 @ Set Due Date | | | | | | |
| ÷ | General Overview CDA | eAcknowledgement R | eport Analyze Report | | | | |
| B | Select 🗸 Selected Items 🗸 | ▲ Export ▲ Import | C Mass update | | | Ω T Filters | Manage Columns |
| • | Showing 3 entries out of 3 Recipient 0 | Last Updated @ | Date Responded @ | Response Status | Files Integration Status | Approving Status | Selected 0 entries (|
| | ovasilenko@ecisys.com | Apr 1, 2025 | Apr 1, 2025 | Responded, viewed | N/A 😜 | N/A | |
| * | ovasilenko+2@ecisys.com | Apr 1, 2025 | Apr 1, 2025 | Responded, not viewed | No attachments | N/A | |
| | ovasilenko+1@ecisys.com | Apr 1, 2025 | Apr 1, 2025 | Responded, viewed | N/A 😜 | N/A Delete | Sent Form |
| 0 6 | Show 10 V | | | | | Delete | Supplementary |
| | | | | | | | |

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7. CATEGORIES

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

Categories tab is divided into two sections:

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

| | AL | E 🌟 qa24 🗸 | | | ^ی ن و | testmailefeasibilty |
|---|----------|---------------------|----------|------------------------------|------------------|---------------------|
| ÷ | Question | Categories | + Add Fo | erm Types | | + Add |
| | | Category Name | | form Types | | |
| • | | cat1 | 2 × 1 | One question | | 2 × |
| - | | cat2 | 2 × 1 | 3 All types - all required | | ⊠ × |
| | | Demo | 2 × / | Acknowledge questions | | 2 × |
| - | | ererer | 8 x (| empty | | ⊠ × |
| - | | Name3 | 2 × 3 | Monitoring Visit Form | | |
| ~ | | New category | ⊠ × ' | Multiple Choice | | 3 × |
| ~ | | Newcategory14082024 | ♂ × ? | Name2 | | (K × |
| | | Testdemo | 2 × 1 | hame_2 | | 3 × |
| - | | | , | New Supplementary Form title | | ⊗ × |
| | | | , | Newformtype14082024 | | (% × |
| | | | | ABC | | ⊗ × |
| | | | r | ad ty | | 2 × % |
| | | | 1 | Rater Questionnaire | | |
| | | | | Regression2.7 | | 2 × |
| | | | 5 | Site Feasibility | | |
| | | | 5 | Supplementary Forms | | 8 × |
| | | | 1 | fest Form | | 2 × |
| | | | , | fest1 | | 2 × 8 |
| | | | 1 | festing 123 | | 2 × |

7.1 Question Categories

To create categories, follow these steps:

- 1. Click **Categories** from the left side menu bar. The Categories dashboard opens, displaying two sections: **Question Categories** and **Form Types**.
- 2. In the Question Categories section, click the Add button. The Add Question Category dialog box opens.
- 3. Enter the Question Category name. The user can also assign a color to the category.
- 4. To select a color, check the **Category Color** checkbox. This opens the Color Picker.
- 5. Choose a color from the Color Picker, then click **OK**.
- 6. You are returned to the Add Question Category dialog box, where the selected color is now shown in the Category Color checkbox.
- 7. Click **Add** to add the new Question Category to the list.

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| | AL TERACTIVE 🜟 qa24 🗸 | | |
|----------|--------------------------|-------------------------|------------|
| » | Question Categories | | + Add |
| † | Category Name | | |
| | cat1 | Add Question Category | & X & X |
| - | Demo ererer | Demo Category color: | & X & X |
| ~ | Name3 New category | | 3 × |
| | Newcategory14082024 | Cancel Add | 8 × |
| | | | |

- To update an existing category, click the Edit icon next to the category name. The Update Question Category dialog box opens.
- 9. Modify the Title and/or Color as needed, then click Update to save your changes.

| | RIAL ITERACTIVE 📌 9824 🗸 | | |
|--------|----------------------------------|--------------------------|------------|
| » + | Question Categories | | + Add |
| - | Category Name | | C × |
| ٠ | cat2 | Update Question Category | @ × |
| ** | ererer Name3 | Category color: | @ X @ X |
| ¢\$ | New category Newcategory14082024 | Cancel Update | @ X @ X |
| ⊞ | Testdemo | | C X |

10. To remove a category, click the **Delete (cross)** icon next to the category name. The category is removed from the list.

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| | IAL TERACTIVE \star qa24 🗸 | |
|----------|-------------------------------|------------|
| » + | Question Categories | + Add |
| — | Category Name | |
| | cat1 | Z 🗙 |
| | cat2 | <i>I</i> × |
| | Demo | <i>I</i> × |
| 202 | ererer | <i>C</i> × |
| | Name3 | Z × |
| 02 | New category | e × |
| | Newcategory14082024 | e × |
| E | Testdemo | Z 🗙 |
| | | |

7.2 Form Types

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

To add Form Types, follow these steps:

- 1. Select Categories from the Menu Bar. The Categories window opens.
- 2. Click the Add button from the Form Types section. The Add Form Type dialog box opens. Refer to the screenshot below.

| | IAL TERACTIVE | 📌 qa24 🗸 | | | · • • • • |
|-------|------------------|---------------------|-------|------------------------------|-----------|
| * | Question Cat | egories | bha + | Form Types | + Add |
| form: | | | | | |
| | | Category Name | | Form Types | |
| | | cat1 | 3 × | 1 One question | 2 × |
| | | cat2 | ⊗ × | 3 All types - all required | 2 × |
| | | Demo | (K × | Acknowledge questions | 2 × |
| - | | ererer | S × | empty | 2 × |
| • | | Name3 | (X × | Monitoring Visit Form | |
| ~ | | New Category | (X X | Multiple Choice | G × |
| ~ | | Newcategory14082024 | (X × | Name2 | ☑ × |
| _ | | Testdemo | 8 × | name_2 | 2 × |
| | | | | New Supplementary Form title | 2 × |
| | | | | Newformtype14082024 | 2 × |
| | | | | Q&A | 2 × |
| | | | | rad ty | 2 × |
| | | | | Rater Questionnaire | |
| | | | | Regression2.7 | 2 × |
| | | | | Site Feasibility | |
| | | | | Supplementary Forms | 2 × |
| | | | | Test Form | 2 × |
| | | | | Test1 | 2 × |
| | | | | Testing 123 | C × |
| | | | | | |

3. Enter the Form Type and then click Add to add the Form Type to the list.

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| | () () () () () () () () () () () () () (|) |
|------------------------------|---|------------|
| Form Types | | + Add |
| | | |
| Form Types | | |
| 1 One question | Add Form Tring | Z X |
| 3 All types - all required | Add Form Type | Z × |
| Acknowledge questions | | Z × |
| empty | | Z × |
| Monitoring Visit Form | | |
| Multiple Choice | Cancel Add | Z × |
| Name2 | | e x |
| name_2 | | Z × |
| New Supplementary Form title | | Z × |
| Newformtype14082024 | | Z × |
| Q&A | | Z × |
| rad ty | | Z × |

- 4. To update an existing category, click the **Edit** icon next to the category name. The Update Question Category dialog box opens.
- 5. Modify the Title and/or Color as needed, then click Update to save your changes.

| | | ? | Ū, | 📤 testmailefeasibilty 🗸 |
|----------------------------|------------------|--------|----|-------------------------|
| Form Types | | | | + Add |
| Form Types | | | | _ |
| 1 One question | Update Form Type | | | Z × |
| 3 All types - all required | 1 One question | | | Z × |
| Acknowledge questions | 1 One question | | | Z × |
| empty | | | | Z × |
| Monitoring Visit Form | Cancel | Update | | |
| Multiple Choice | | | _ | ▲ |
| Name2 | | | | Z × |
| name_2 | | | | Z × |

6. To remove a category, click the **Delete (cross)** icon next to the category name. The category is removed from the list.

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| Form Types | + Add |
|----------------------------|------------|
| | |
| Form Types | |
| 1 One question | C 🗙 |
| 3 All types - all required | C × |
| Acknowledge questions | C × |
| empty | C × |
| Monitoring Visit Form | |
| Multiple Choice | 2 × |
| Name2 | C × |
| name_2 | <i>⊠</i> × |

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8. CONTACT

Contacts are the members in a Survey. You can add, edit and delete the contact/groups.

The Contacts dialog box is divided into below sections:

- 1. Groups
- 2. Contacts
- 3. Contact Details

| TRIAL INTERACTIVE * qa2 | 14 🗸 | | | | | | |
|----------------------------|----------------|---------------------|-------|----------|------------------|----------|-------------------|
| ≫ ≝ Groups | 🕇 Add 💼 Delete | La Contacts | + Add | ↑ Import | T Filters | î Delete | E Contact Details |
| + All Contacts | | User, QATest | | | | í | |
| 123 | | user, SQA | | | | | |
| 2134 | | tester, QA | | | | | |
| 23e45 | | test, Wow | | | | | |
| ABC group | | SQA, test | | | | | |
| asdf | | Smith, John | | | | | |
| asdfgh | | QA, Test | | | | | |
| Custom Group_QA | | Newton, Isaac | | | | | |
| DocTCS | | III72-ed, fff72-ed | | | | | |
| DocTWS | | J. Ash | | | | | |
| gr gr | | Gutenberg, Johannes | | | | | |
| group1408 | | D, Amra | | | | | |
| New List | | qa2+4@ecisys.com | | | | | 1 |
| QA group2 | | qa2+6@ecisys.com | | | | | |
| qwerty | | qa2+v@ecisys.com | | | | | |
| qwertyrrt | | 111@111.111 | | | | | |
| qwertyui | | qa2+02@ecisys.com | | | | | |
| SQA_group | | qa2+03@ecisys.com | | | | | |
| t1 | | qa2+77@ecisys.com | | | | | |

8.1 Groups

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

Groups allow the user to:

- Create New Groups
- Delete New Groups

8.1.1 Creating New Group

To create a new Group, follow these steps:

- 1. Click the Add button from the Group Section
- 2. The Create New Group pop up window is displayed.
- 3. Enter the Group Name and then click the Create button to add the group to the list.
- 4. To add contacts to the Group, type contact name in 'Search Contacts' and click Add.
- 5. Click **Create** and click the required **Group** view the added contacts to the group.

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| | TERACTIVE | |
|-------|-----------------------------------|------------------|
| » | Groups + Add Delete | La Contacts |
| + | All Contacts | User, QATest |
| | 123 | user, SQA |
| | 2134 | tester, QA |
| | 23e45 | test, Wow |
| . * 1 | ABC group | SQA, test |
| | Create New Group | |
| 08 | Group Name: | |
| | Create Additional Configuration : | |
| ■ | email Search contacts | Add |
| | Cancel | |
| | QA group2 | qa2+6@ecisys.com |
| | qwerty | qa2+v@ecisys.com |
| | qwertyrrt | 111@111.111 |

8.1.2 Deleting Group

Note:

- The user can delete only the newly created group.
- The All-Contacts Group cannot be deleted.
- The **Bin** icon is visible only for the newly created groups.

To delete the group, follow these steps:

- 1. Select the Group which the user wants to delete.
- 2. Click the **Delete** button in the bottom left corner from the Groups section. The Delete Group dialog box opens asking for the confirmation of group deletion.

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3. Click **Delete button** to delete the group or cancel to cancel the action.

8.2 Contacts

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

- Add Contacts
- Import Contacts .
- Import Contacts in Group ٠
- Search Contacts ٠

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| | 124 ¥ | | | | | | 0 | Ç, | ۲ | |
|------------------|---------------|---------------------|------|--------|------------------------|-------------------------|---|----|---------|----------|
| Marcoups | +Add E Delete | Contacts | +Add | Delete | Contact Details | | | | GP Edit | t Delete |
| All Contacts | | User, QATest | | 1 | First even | 01744 | | | | |
| 123 | | user, SQA | | | Prischallie. | QATES | | | | |
| 2134 | | tester, QA | | | Last name: | User | | | | |
| 23e45 | | test, Wow | | - 1 | Email: | user2test02@outlook.com | | | | |
| ABC group | | SQA, test | | | Phone: | | | | | |
| asdf | | Smith, John | | - 1 | Country: | | | | | |
| asdfah | | QA, Test | | | Organization: | Google | | | | |
| Custom Group, OA | | Newton, Isaac | | - 1 | Role: | Tester | | | | |
| DocTCS | | III72-ed, fff72-ed | | | Investigation types: | empty | | | | |
| DocTWS | | L Ash | | - 1 | Groups | Custom Group OA | | | | |
| 87 | | Gutenberg, Johannes | | | | OA group? | | | | |
| group1408 | | D. Amra | | | | | | | | |
| New List | | ga2+4@ecisys.com | | | Additional Information | | | | | |
| QA group2 | | qa2+6@ecisys.com | | | | | | | | |
| qwerty | | qa2+v@ecisys.com | | | Completed Surveys | | | | | |
| qwertyrrt | | 111@111.111 | | | | | | | | |
| qwertyui | | ga2+02@ecisys.com | | | | | | | | |
| 501 group | | as3x02@aciout.com | | | | | | | | |

8.2.1 Add Contacts

To Add Contacts, follow these steps:

- 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.

| La Contacts | + Add | ↑ Import | T Filters | | 🗉 Contact Det | ails | |
|----------------------|---------------|-----------------|------------------|---|---------------|------------------|-------------------------|
| Create New Contact | | | | | | First name: | QATest |
| First name: | | | | | Î | Last name: | User |
| Last name: | | | | | | Phone: | userziestoz@outlook.com |
| Email:* | | | | | | Country: | |
| Organization: | | | | | | Organization: | Google |
| Phone: | | | | | | stigation types: | empty |
| Country: | | | | | • | | Custom Group_QA |
| Role: | | | | | | ation | QA group2 |
| Groups: | Select Groups | ~ | | | | | |
| Tech Docs: | | | | | | ys | |
| numbers: | | | | | | | |
| date: | | m | | | | | |
| Sale: | | | | | | | |
| | Ca | ancel C | reate | | * | | |
| NewContact+8@new.new | _ | | _ | _ | | | |

8.2.2 Import Contacts

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To Import Contacts. Follow these steps:

- 1. Click Import button. Import Contacts pop up window is displayed.
- 2. Click the ${\bf Search}$ button to locate the CSV file for importing contacts.

| Le Contacts | + Add | ↑ Import | ▼ Filters | |
|--|---------------------|-----------------|------------------|----------|
| User, QATest | | | | î |
| user, SQA | | | | |
| tester, QA | | | | |
| test, Wow | | | | |
| St Import Contacts Sr Q, • Please, select import so | urce file in CSV fo | rmat | | _ |
| Ne III: J, , Create new group wi | th imported con | tacts? | | Q Search |
| D, | Cancel | Continue | | |
| qa2+4@ecisys.com | | | | |

- 3. The Search box with a magnifying icon to import the source file from the system.
- 4. The Create New Group with imported contacts? checkbox allows you to create new group and import contacts simultaneously in the group.
- 5. The Cancel and Continue buttons The Continue button is deactivated by default and is activated only when the source file is imported.
- Click the magnifying glass (Search button) icon next to the textbox to import the source file. The File Upload dialog box opens to allow you to import the file from the system, which contains the list of contacts.

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

Note:

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

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| & Contacts | + Add | ↑ Import | ▼ Filters | |
|---------------------------------|-----------------|------------|------------------|----------|
| User, QATest | | | | ĥ |
| user, SQA | | | | |
| tester, QA | | | | |
| Import Contacts | | | | |
| Please, select import source fi | ile in CSV form | nat | | |
| sample_data.csv | | | | Q Search |
| Please, print new group name | e for importing | g contacts | | |
| New Group | | | | |
| Create new group with imp | ported conta | cts? | | |
| | Cancel | Continue | | |

8. The Field Association dialog box opens. Setup the mapping between E-Feasibility fields and the Source file fields.

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| Le Contacts | + Add | ↑ Import | ▼ Filters | | |
|-------------------|-------|-----------------|------------------|---|---|
| User, QATest | | | | | â |
| user, SQA | | | | | |
| tester, QA | | | | | |
| Field Association | | | | | |
| In eFeasibility | | In File | | | |
| Last name | | | | ~ | Î |
| First name | | | | ~ | |
| Email * | | | | ~ | |
| Phone | | | | ~ | |
| Organization | | | | ~ | |
| Role | | | | ~ | |
| Tech Docs | | | | * | Ŧ |
| | Back | Import | | | |

- 9. Once the mapping is done, click the Import button. A dialog box opens displaying the progress of the import result along with the total count of Contacts, imported contacts, updated contacts and Failed import.
- 10. Click **OK** button to import contacts to All Contacts list.

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| 2 | Contacts | | + Add | ↑ Import | ▼ Filters | 📋 Delete |
|----|-------------|---------|----------------------------------|--------------------|------------------|----------|
| U | ser, QATest | | | | | A |
| us | ser, SQA | | | | | |
| te | ster, QA | | | | | |
| te | st, Wow | | | | | |
| SC | QA, test | | | | | |
| | Import Res | ults | | | | |
| L | Total: 5 | Importe | ։d: 0 Սր | odated: 0 | Failed: 5 | |
| L | Row ID | Email | Message | | | |
| L | 1 | 1 | ExceptionEmai | l for this contact | is not valid | |
| L | 2 | 2 | ExceptionEmai | l for this contact | is not valid | |
| | 3 | 3 | ExceptionEmai | l for this contact | is not valid | |
| | 4 | 4 | ExceptionEmai | l for this contact | is not valid | |
| L | 5 | 5 | ExceptionEmai | l for this contact | is not valid | |
| L | | | Import proce | ss was complete | d | |
| | | | O | k | | |

8.2.3 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.
- 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.

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| & Contacts | + Add | ↑ Import | ▼ Filters | |
|-----------------------------------|----------------|-----------------|------------------|----------|
| User, QATest | | | | 4 |
| Import Contacts | | | | |
| Please, select import source file | in CSV format | t | | |
| sample_data.csv | | | | Q Search |
| Please, print new group name for | or importing c | ontacts | | |
| D, Amra | | | | |
| Create new group with impo | orted contact | s? | | |
| | Cancel | Continue | | |
| D, Amra | | | | |

8.2.4 Search Contacts

To search contacts, follow these steps:

- 1. Select the Group from the Groups section from which user want to search contact or select all contacts.
- 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.

| | RIAL ITERACTIVE * | qa24 🗸 | | | | | | |
|----------|----------------------|--------|----------|------------------------|-----------------|----------|-----------|----------|
| New Form | 嶜 Groups | + Add | 🛍 Delete | Le Contacts | + Add | ↑ Import | ▼ Filters | 🛍 Delete |
| + | All Contacts | | | email 🗸 | Search contacts | | | Q Search |
| - | 123 | | | ampile assessment of M | | | | <u> </u> |
| | 2134 | | | email: newcontact | | | | |
| | 23e45 | | | NewContact7@new.new | | | | |
| • | ABC group | | | NewContact+8@new.new | | | | |
| | asdf | | | NewContact+9@new.new | | | | |
| * | asdfgh | | | | | | | |
| | Custom Group_QA | | | | | | | |

8.3 Contact Details

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

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The Contact Details section displays the following sections:

- Contact Details: This section displays the Contact Name along with the contact fields.
- Additional Information: This section displays the Custom Contact Fields.
- 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.
- CDA: This section displays the Title, Status, the last updating of the form and the actions to take on the • form.
 - o Preview: Click the Preview icon to open the form in a new tab.
 - o Download: Click the Download icon to download a PDF of the form.
- Click the Down Arrow icon to the right of every section header to expand it. This arrow icon is converted ٠ to horizontal line after expanding the section. Click the icon to collapse the section. Refer to the below screenshot.

| EI Contact Details | | | 🕑 Edit | 🛍 Delete |
|------------------------|----------------------------|----------------------|--------|----------|
| First name: | Isaac | 1 | | |
| Last name: | Newton | | | |
| Email: | qa2+2@ecisys.com | | | |
| Phone: | | | | |
| Country: | | | | |
| Organization: | | | | |
| Role: | | | | |
| Investigation types: | 3 All types - all required | empty 1 One question | | |
| Groups: | | | | |
| Additional Information | | | | ~ |
| Completed Surveys | | | | * |
| CDA | | | | ~ |

8.3.1 Editing Contact

To edit the Contact:

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

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| I Contact Details | | Edit Contact | 🛍 Delete |
|------------------------|---|--------------|----------|
| First name: | Isaac | | |
| Last name: | Newton | | |
| Email: | qa2+2@ecisys.com | | |
| Phone: | | | |
| Country: | | | |
| Organization: | | | |
| Role: | | | |
| Investigation types: | 3 All types - all required empty 1 One question |) | |
| Groups: | | | |
| Additional Information | | | , |
| Completed Surveys | | | , |
| CDA | | | |

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.

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| E Contact Details | Cancel 🗴 🛱 Delete |
|----------------------|--|
| First Name: | Is |
| Last name: | Newton |
| Email: | qa2+2@ecisys.com |
| Phone: | |
| Country: | |
| Organization: | |
| Role: | |
| Investigation types: | 3 All types - all required empty 1 One question Multiple Choice Monitoring Visit |
| | Form 3 All types - all required New Supplementary Form title |
| Groups: | Select Groups |
| Tech Docs: | |
| numbers: | |
| date: | m |
| Sale: | |
| Domain: | m |
| J Paper: | |
| | Cancel Save |

8.3.2 Deleting Contact

You can delete contact in the following ways:

- 1. Click the Cross icon displayed on the right side of Contacts section.
 - Select the contact from the Contacts section.
 - Click the cross icon to delete the contact.
 - The Delete Contact from this Group pop up window is displayed.
 - Click **Delete** to execute the action.
- 2. Through the Delete button displayed in the Contact Details section.

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- Click the Delete button from the Contact Details section. The Delete contact pop up window is displayed.
- Click **Delete** to execute the action.

| Contacts | + Add | ↑ Import | ▼ Filters | | E Contact Details | G≇ Edit | 🛢 Delete |
|---------------------|-------|-----------------|------------------|---|--|---------|----------|
| User, QATest | | | | î | Circl name: Jease | | |
| user, SQA | | | | | Last name: Newton | | |
| tester, QA | | | | | Lost norther and 200 days and | | |
| test, Wow | | | | | Email: qa2+2@ecisys.com | | |
| SQA, test | | | | | | | |
| Smith, John | | | | | | | |
| QA, Test | | | | | Organization: | | |
| Newton, Isaac | | | | | Role: | | |
| III72-ed, fff72-ed | | | | | Investigation types: 3 All types - all required empty 1 One question | | |
| J. Ash | | | | | | | |
| Gutenberg, Johannes | | | | | Delete Contact | | |
| D, Amra | | | | | Are you sure you want to delete the contact? It | | × |
| qa2+4@ecisys.com | | | | | will be deleted from the system! | | |
| qa2+6@ecisys.com | | | | | | | Ň |
| qa2+v@ecisys.com | | | | | Cancel Delete | | |
| 111@111.111 | | | | | | | × I |

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9. SETTINGS

E-Feasibility requires basic settings to be configured to perform actions on a Form. Click **Settings** from the toggling menu bar to access the global project settings.

The Settings menu includes the following tabs:

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

9.1 General Tab

The General tab contains the following settings:

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

9.1.1 General Settings

The General tab contains the following checkbox:

- 1. **Include Date Submitted when printing form response to PDF**: When selected, the current date of the survey response will be displayed on the form when it is downloaded or printed as a PDF.
- 2. Electronic Signature Settings: This section allows configuration of electronic signature options for form submissions:

DocuSign: When enabled, fields appear to input necessary integration credentials:

- Application URL
- OAuth Application
- User ID
- Integrator Key
- o API Account ID
- o RSA Key

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9.1.2 Electronic Signature Panel

To use Electronic Signature Panel, follow these steps:

- 1. Digital Signature (checked by default): This is default signature process that is used to sign the CDA.
- 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.
- 4. Each of the above fields provides the help question mark at the end clicking which displays the tooltip as below.

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| Jocusign | | |
|---------------------|-----------------------------------|---|
| Application url * | https://demo.docusign.net/restapi | 0 |
| OAuth Application * | account-d.docusign.com | G |
| User ID * | User Id | 6 |
| Integrator key * | Integrator key | 0 |
| API Account ID * | API Account ID | 6 |
| RSA Key * | RSA Integration key | |

9.1.3 Country Settings

Country Setting tab allows users to define the list of countries that can be used when adding a **Country** field in a form. Countries can be added either manually or imported in bulk.

The user can add countries in the following ways:

- 1. Adding Countries Manually
 - Navigate to the **Country Settings** tab.
 - Locate the empty text field under the country list.
 - Enter the name of the country you want to add.
 - Press Enter or click outside the field to save the entry.

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| | ↑ Import coun |
|-----------|---------------|
| Australia | > |
| Canada | > |
| China | 3 |
| Europe | 3 |
| India | 3 |
| Japan | 3 |
| London | 3 |
| Nepal | e 2 |
| UK | د |
| USA | 3 |
| Another | |

2. Importing Countries in Bulk

- Click the Import Country button at the top of the Country Settings panel.
- Upload your country list file in the supported format (e.g., CSV).
- Click **OK** to confirm and import the countries into the system.

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| Country Settings | | |
|---|--------------|------|
| | ↑ Import cou | ntry |
| Australia | | × |
| Canada | | × |
| Bulk Countries | | |
| Enter new line, comma or semicolon separated countries: | | |
| | | |
| | | |
| | | |
| | | |
| | | h |
| | | |
| Cancel Ok | | ß |

9.1.4 Adding Countries Manually

To add countries manually, follow these steps:

- 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

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| | ↑ Import country |
|-----------|------------------|
| Australia | × |
| Canada | × |
| China | × |
| Europe | × |
| India | ₩ × |
| Japan | e x |
| uk | |

- 3. Enter the country name in the textbox with the text Another....and press Enter on the keyboard. The country gets added to the list with a green tick next to it.
- 4. Click cross next to the Country name to remove the country from the list.

9.1.5 Importing Countries in Bulk

To Import Countries in Bulk, follow these steps:

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

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| Country Settings | |
|---|---------------|
| • II | nport country |
| Australia | × |
| Canada | × |
| Bulk Countries | |
| • Enter new line, comma or semicolon separated countries: | |
| United Kingdom | |
| Germany | |
| France | |
| Brazil | |
| South Africa | |
| | li. |
| Cancel Ok | li |

9.1.6 Email Domains

Email Domains allow users to define the domains that can be used to send surveys. These are the email domains from which a manager can send a survey to a submitter. A Manager will not be able to send a survey until the email domain is configured.

To add new Email domain, follow these steps:

- 1. From the Settings menu, navigate to General > Email Domains.
- 2. In the text box labeled **Another...**, enter a new email domain and press **Enter** or click outside the field. The domain will be added to the list with a green checkmark indicating it has been successfully saved.
- 3. To remove a domain from the list, click the **cross (×)** icon next to the domain name.

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| trialinteractive.com | × |
|-------------------------|-----|
| efeasibility.ecisys.net | × |
| transperfect.com | × |
| emaildomain.com | × |
| abcd.com | 🥹 🗙 |
| xyz.com | |

9.2 Contact Settings

Contact Settings tab allow you to define custom contact fields that can be used to map form questions to contact information when creating a new form. These fields can also be mapped when importing a new or existing survey from a source file.

To create Custom Contact Fields, follow:

- 1. From the Settings menu, click Contact Settings.
- 2. The Contact Settings tab displays two fields:
 - Custom Field Name: A textbox to enter the name of the custom field.
 - Custom Field Type: A dropdown to select the field type (Text, Date, or Number).
- 3. Enter the desired field name in the **Custom Field Name** textbox.
- 4. Select the appropriate field type from the **Custom Field Type** dropdown list.
- 5. Click the Add button next to the Custom Field Type field to add the custom field to the list.

| | IAL TERRACTIVE * 9424 ¥ | () |
|----------|--|---|
| * | General Contact Settings System Generated Questions Integration Settings Templates | |
| + | Custom Reld Name* Custom Reld Type* Text | |
| • | Tech Docs | B O O X |
| • | | |
| | 💼 date 🕼 Sale | 800× |
| | 🗂 Domain | 300× |
| « | 🚥) Paper IN Testfeld | x 0 0 % |
| | con numberlield | COOX |
| | Testi,text | 800x |
| | en Test Jium | G O O X |
| | Sample1_Text | COO× |

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9.2.1 Editing Custom Field

To Edit Custom fields, follow these steps:

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

| G | IRIAL NTERACTIVE ★ @24 ¥ | 0 | Ō | | | ainte pa |
|-----|--|---|---|---|-----|------------|
| * | General Contact Settings System Generated Questions Integration Settings Templates | | | | | |
| + | Custom Reld Name* Custom Reld Type* Text | | | v | • | Add |
| | ၍ Tech Docs | | | 8 | 0 0 | o × |
| • | Con Rumbers | | | | | |
| * | i one i sole | | | ß | 0 0 | 0 × |
| ¢\$ | Domáin Domáin Dir J Paper | | | 8 | 00 | × C |
| | (z) Testfield | | | 8 | 00 | 0 × 0 × |

9.2.2 Changing the Sequence of Custom Field

To change the sequence of Custom Field, follow these steps:

- 1. Click the Up and Down Arrows to change the sequence of the Custom Fields. You can also drag-anddrop the field to the required position.
- 2. Click the Cross icon to remove the Custom Field from the list.

| | RIAL ITERACTIVE * Q24 V | 0 | <u>©</u> | • |
|---|--|---|----------|---------------|
| > | General Contact Settings System Generated Questions Integration Settings Templates | | | |
| * | Custom Field Name* Custom Field Type* Text | | | ✓ +Add |
| ۵ | the star | | | ROOX |
| • | an numbers | | | COOX |
| | 🗟 Sale | | | ₿0 0 × |
| | Domain | | | 200× |
| ו | Testfeld | | | BOOX |
| | ean numberlield | | | BOOX |

9.3 System Generated Questions

The System Generated Questions tab allows users to manage Question Groups, which are collections of predefined questions that can be reused across multiple surveys and forms. Each group can contain multiple questions, which can be viewed, edited, or expanded as needed. This streamlines the survey creation process by allowing consistent and centralized management of commonly used questions.

9.3.1 Viewing and Editing System Generated Question Group

To View and Edit system generated questions, follow these steps:

- 1. Navigate to the Settings menu and select the System Generated Questions tab.
- 2. A list of existing **Question Groups** is displayed on the main page.

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| | IAL TERACTIVE 🖈 qa24 🗸 |
|----------|--|
| » | General Contact Settings System Generated Questions Integration Settings Templates |
| Ŧ | Questions group |
| • | 1 One question empty |
| ** | 3 All types - all required Test Form |
| • | New Supplementary Form title Multiple Choice |

3. Click on the name of any listed Question Group to view its details.

4. To edit a question, click the **Edit** icon next to the question.

| | TERACTIVE 🕈 🕬24 👻 | | | | () Č ⁽⁾ () |
|----|-------------------------------|---------------------------------|-----------------|---|---------------------------|
| * | Group name: 1 One question | | | | ß |
| + | | | Create Question | | |
| ۵ | | | | | |
| • | 1. HIST QUESTION | | | | |
| | | | | | |
| •6 | Question: * BIRST QUESTION | Question type : Text Field | | Content restriction: No Restriction | v |
| | Answer options | | | | Contact Field Association |
| | | | | | • X |
| | Make required | Answer choices must be the same | | | |
| | | Car | Update Question | | |

- 5. An editing option will open, allowing you to modify the question and its answer.
- 6. After saving, the edited question and answer will appear at the end of the list on the page.

9.3.2 Creating a New Question Group

To create a New Question Group, follow these steps:

- 1. On the main screen, click the Create New Questions Group button.
- 2. A new screen will appear with a field to enter the group name.
- 3. Enter the desired name for the new question group.
- 4. Click Add to create and save the new group.

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| ? Č ^m | |
|--------------------------------------|-------|
| | |
| Create new Questions | Group |
| | × |
| Add System Generated Questions Group | × |
| Demo Question | x |
| Cancel Add | × |
| | × |

9.4 Integration Settings

The Integration Settings allow you to map a form and replicate it into an integrated Trial Interactive (TI) folder. These settings are applicable only to published forms.

When a submitter completes and submits a response:

- The **Sponsor/CRO** receives the form submission.
- A PDF version of the submitted form is automatically saved in the mapped TI folder.
- The system also maps the **form metadata** to the metadata fields associated with the selected **document type** in the TI Room.

| | RIAL NTERACTIVE * qa24 * |
|----|--|
| » | General Contact Settings System Generated Questions Integration Settings Templates |
| + | Select form Before specify settings, please select form |
| | |
| ٠ | |
| * | |
| 00 | |

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To Configure Integration setting, follow these steps:

- 1. From the Menu Bar, click the Settings icon in the left navigation panel.
- 2. The Settings Dashboard opens.
- 3. Click on Integration Settings, then click the Select Form button.
- 4. The Published Form Search dialog box appears.

| seneral Cont | act Settings System Genera | ted Questions Inte | | Templates | | |
|--------------------|----------------------------|--------------------|--------------|-----------------------|-------------------------------|--------------|
| alattan 0 s | | form | | | | |
| | | | | | | |
| Published Fo | rm Search | | | | | |
| | | | | | | |
| | Q Search | Choose form type | ~ | Date Created: | to: | |
| | | | | | | |
| Showing 10 entries | out of 316 | | | | | |
| Is integrated | Title | Study Name | Organization | Туре | Created By | Date Created |
| ~ | TPTEF-5410 | | | empty | ovasilenko@ecisys.com | Apr 1, 2025 |
| | New Form | | | Acknowledge questions | testmailefeasibilty@gmail.com | Mar 24, 2025 |
| ~ | TPTEF-5422 | | | 1 One question | ovasilenko@ecisys.com | Apr 1, 2025 |
| | eAcknowlwdgement demo | | | 1 One question | testq7301@gmail.com | Apr 9, 2025 |
| | synopsis test | | | 1 One question | qatest1323@outlook.com | Apr 9, 2025 |
| | new form | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 |
| | New form | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 |
| | Draft test | | | empty | qatest1323@outlook.com | Mar 24, 2025 |
| | New form | | | empty | qatest1323@outlook.com | Mar 24, 2025 |
| | Mvr1_simple | | | empty | gatest1323@outlook.com | Mar 21, 2025 |
| | | | | | | |

- 5. From the displayed list, select the required form.
- 6. Click Add Selected. (Note: This button is enabled only after a form is selected.)

| | Q Search | Choose form type | ~ | Date Created: | to: | |
|-------------------------|-----------------------|------------------|--------------|-----------------------|-------------------------------|--------------|
| howing 10 entries out o | 1316 | | | | | |
| is integrated | Title | Study Name | Organization | Type | Created By | Date Created |
| * | TPTEF-5410 | | | empty | ovasilenko@ecisys.com | Apr 1, 2025 |
| | New Form | | | Acknowledge questions | testmailefeasibilty@gmail.com | Mar 24, 2025 |
| ~ | TPTEF-5422 | | | 1 One question | ovasilenko@ecisys.com | Apr 1, 2025 |
| | eAcknowlwdgement demo | | | 1 One question | testq7301@gmail.com | Apr 9, 2025 |
| | synopsis test | | | 1 One question | qatest1323@outlook.com | Apr 9, 2025 |
| | new form | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 |
| | New form | | | Test Form | testmailefeasibilty@gmail.com | Mar 27, 2025 |
| | Draft test | | | empty | qatest1323@outlook.com | Mar 24, 2025 |
| | New form | | | empty | qatest1323@outlook.com | Mar 24, 2025 |
| | Mvr1_simple | | | empty | qatest1323@outlook.com | Mar 21, 2025 |
| show 10 w | | | K < 1 | 234533 | | ~ |

- 7. You will be redirected to the Integration Settings window.
- 8. The selected form title appears in the $\ensuremath{\textbf{Selected Form}}$ textbox.
- 9. Check the Enable/Disable Origami Integration checkbox to activate the integration settings.
- 10. Additional fields for configuring integration parameters will now appear.

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11. Enter the required details as applicable.

Note: For detailed guidance on each parameter, refer to the Origami Settings section.

12. After completing all required fields, click Save Settings.

| | HAL TERACTIVE ★ qu24 ✔ | |
|---|--|---|
| » | General Contact Settings System Generated Questions Integration Settings Templates | |
| + | Select form Selected Form: TPTEF-5410 | |
| | inable/Disable origami integration | |
| • | | |
| | Origami Domain:* https://sqa-stage.trialinteractive.com/Origami | 0 |
| | User Login:* ovasilenko@ecisys.com | 0 |
| • | User Access Token:* A935D0C1-5599-4ACD-885A-F881E4F1DADA | 0 |
| | Site ID:* 4309 | 0 |
| | Parent ID:* 2967610 | 0 |
| | Topic Type ID:* 4 | 0 |
| | Application Domain:* demo | 0 |
| | Save settings | |

13. The **Metadata Mapping** dialog box will open, displaying the following dropdowns:

- Document Category: Select the appropriate document category from the TI system.
- **Document Type**: Select the relevant document type to associate with the form.

| | RIAL NTERACTIVE * ga24 * | | | | | | | | |
|----|---------------------------------------|------------|--------------------------|-----------------|------------------|---|--|--|--|
| > | General Contact Settings System Gene | erated Qu | estions Integration Sett | tings Templates | | | | | |
| + | Select form Selected Form: TPTEF-5410 | | | | | | | | |
| | Enable/Disable origami integration | | | | | | | | |
| • | | | | | | | | | |
| | Origami Domain:* | https://sq | Metadata Mapping | | | | | | |
| _ | User Login:* | ovasilenki | Document category: * | _ | Document type: * | _ | | | |
| 00 | User Access Token:* | A935D0C | custom | ~ | testcustom | · | | | |
| m | Site ID:* | 4309 | Question | TI field | | | | | |
| | Parent ID:* | 2967610 | TEst1 | | × | | | | |
| | Topic Type ID:* | 4 | | | | | | | |
| | Application Domain:* | demo | | Cancel | Accept | | | | |
| | | | | | Save settings | | | | |

- 14. Choose the Document Category and Document Type from the dropdowns.
- 15. Map each form question to its corresponding field using the TI field dropdown.
- 16. Once all fields are mapped, click **Accept** to complete the Origami integration setup. A success message will confirm the mapping.

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- 17. When a **manager** sends a form via PDF in a survey email, the **Submitter** downloads, completes, and submits it. Upon submission:
 - The response is sent to the **Sponsor/CRO**.
 - A PDF copy is saved in the integrated **TI Room**.
 - A Survey Completion email is sent to the Submitter.

9.4.1 Origami Settings

The Origami Settings contains the following fields:

- 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 an ID of the topic.
- Application Domain: The domain of TI application.

To enter the Origami Setting information, follow the below steps. Warning: The login credentials for E-Feasibility and Trial Interactive should be the same.

9.5 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

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| CI | RIAL ITERACTIVE · QA24 · | | (?) Č ^(*) (a) testmailefeasibility | * |
|----------|--|---|--|---|
| * | General Contact Settings System Generated Questions Integration Settings | | | |
| B | Email Templates | Page Templates | | |
| | Template Type: Email response for duplicate submissions | Template Type: | 'CDA is in progress' page template | • |
| • | Description: Text that will be used in an email sent to submitter when heishe submits a survey that has already been submitted before. | Description: | Notification page for recipient, that his CDA is in progress | |
| * | Subject: Duplicate questionnaire submission | CDA verification header | Venfication in progress | |
| • | Normal · iT· A· B / ⊻ i⊟ ⊞ x₂ * 3 E E E E E S co co d + O | 19XL | | ł |
| • | Dear StrecepentEmail, We have already received a submission for \$form/Tate) questionnaire from your email account in the past, Dray one submission is advanced pre-mail account. If you do not submit any response in the past, please contact <u>instrument contact</u> cont | CDA verification in progress message text: | Venfication in progress | |
| | Sincerely, Trial Inferactive Team | | Cancel Preview Sove | T |
| | Insertions: To use an insertion, place cursor where you would like the insertion to happen, press on the insertion icon O and select a desired insertion. | | | |
| | Cancel Preview Save | | | |

9.5.1 Email Templates

The Email Templates section allows you to view and modify predefined email templates used for sending various types of survey-related emails.

The types of predefined templates available in the system are shown in the screenshot below.

| | General Contact Settings System Generated Questions Integration Settings |
|--------|---|
| 2 | 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 |
| • • | Normal · nT· <u>A</u> · B / <u>U</u> h ⊟ H x ₂ x ³ ⊡ E E E ⊡ S oo qo <- → O Dear \$(recipientEmail). |
| ₩ | We have already received a submission for \$(formTitle) questionnaire from your email account in the past. Only one submission is allowed per email account. If you did not submit any response in the past, please contact <u>help@trialinteractive.com</u> . Sincerely, Trial Interactive Team |
| | |
| | Insertions: To use an insertion, place cursor where you would like the insertion to happen, press on the insertion icon O and select a desired insertion. |

Before discussing how to edit a predefined email template, let's first review the various components of the **Email Template** window:

• Template Type: A dropdown that displays a list of predefined email templates available in the system.

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- Description: A non-editable textbox that describes where the selected template is used.
- Subject: A textbox that allows you to enter or modify the subject line of the email.
- Email Text Editor (Body): An editable text area where you can enter or modify the body content of the email.
- **Toolbar**: A ribbon that provides formatting options for the content in the email editor.
- Cancel, Preview, and Save Buttons: Options to cancel changes, preview the email template, or save the updated version.

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. |
| π∗ | 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 Bold . |
| Ι | Allows you to make the text <i>Italics</i> . |
| U | Allows you to make the text <u>Underlined</u> . |
| 1 | Ordered List: Allows you to insert ordered list. |
| | Unordered List: Allows you to insert unordered list. |
| x ₂ | Subscript: Allows you to insert the subscript. |
| x ² | Superscript: Allows you to insert the superscript. |
| U. | Outdent: Allows you to align text to the Left. |
| Ш | Indent: Allows you to align text to the Right. |
| 66 | Justify Left: Allows you to align text to the left justified. |
| Ē | Justify Center: Allows you to align text to the center. |
| III | Justify Right: Allows you to align text to the right justified. |
| S | Strike Through: Allows you to strike the text. |
| 69 | Add Link: Allows you to insert a link to surveys or other references in a mail. Refer section <u>Adding a Link in the mail</u> for more details on this. |
| ¢Ð | Remove Link: Allows you to remove the link. |
| 1_ | Cleaner Style: Allows you to remove the text formatting. |
| - | Horizontal Rule: Allows you to insert a line below the text. |

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| 4> | Source: Allows you to view the text in html format. |
|----|---|
| 0 | Insertions: Allows you to insert in between text. Insertion contains two types: |
| | Survey Title: Allows to insert the Survey title. |
| | Recipients Email: Allows to insert the Recipients Email. |

Editing a Predefined Email Template

To Edit a Predefined email template, follow these steps:

- 1. Click the Template Type dropdown to view the list of predefined email templates.
- 2. Select the required template, then edit the **Subject** and **Email Body** in the text editor as needed.



3. Click Save to apply and save your changes.

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| | nail Templates |
|-------|--|
| ies | Template Type: Response receipt notification email Description: Notification email text to the publisher of the survey that a new survey response has been submitted. Subject: New questionnaire response has been submitted |
| | ormal - ਜੋ- <u>A</u> -B/U∏EE x ₂ x ² ፲ 판 판 포 포 중 Srooge & — ◆ O O Near S(senderEmail). |
| SH ST | (recipientEmail) has submitted a response for \$(formTitle). To view the response please use this link: (tormLif) incerely, rial Interactive Team |
| | |

Adding a Link in the Email

To add a link in the email, follow these steps:

- 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 dropdown, which contains options Web Address, Email Address, and Picture URL.
 - A textbox to enter/copy the link. 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.

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| mail Templates | |
|---|---|
| Template Type: | Response receipt notification email |
| Description: | Notification email text to the publisher of the survey that a new survey response has been submitted. |
| Subject: | New questionnaire response has been submitted |
| Normal _▼ T ⊤ <u>A</u> ∗ B | / ⊻ ≔ ≔ ×₂ ײ ⊒ 판 ⋿ Ξ ∃ \$1001+0 < ◆ 0 0 |
| Web Address 🔻 | Add Link (Clt+L) |
| http:// | |
| ОК | |
| Dear \${senderEma | ail}, |
| <pre>\${recipientEmail} has sul \${formUrl}</pre> | omitted a response for stormTrile. To view the response, please use this link: |
| Sincerely, Trial Interactive Team | |
| nsertions: To use an ins desired insert | ertion, place cursor where you would like the insertion to happen, press on the insertion icon $oldsymbol{O}$ and select ion. |
| | |

 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.

9.5.2 Page Templates

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

The Page Templates is divided into the following:

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

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| TINIERACTIVE # 9424 - | | () Č [®] () ~ ~ |
|--|------------------------|---|
| General Contact Settings System Generated Questions Integration Settings Templates | | |
| Email Templates | Page Templates | |
| Template Type: Select item for editing | • Template Typ | CDA is in progress' page template |
| | Descriptio | hc Notification page for recipient, that his CDA is in progress |
| * | CDA verification heade | Verification in progress |
| o\$ | tex | |
| | (D) with states | Verification in progress |
| | progress message tex | t |
| | | Cancel Preview |
| | | |
| | | |

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10. REPORTS

Report displays all activities of the form. Click the Reports Icon displayed in the left panel. You can also customize the report as per your choice. Report Menu is divided into following tabs:

- Analytics
- Project Activity

| | RIAL NTERACTIVE | 🌟 qa24 🖌 |
|----|--------------------|--------------------|
| » | Analytics | Project Activity |
| + | Select Form | Please select form |
| Ē | | |
| ٠ | | |
| * | | |
| 08 | | |
| | | |

10.1 Analytics

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

To view and customize Report, follow these steps:

- 1. Click **Reports** from the Menu Bar.
- 2. Under the Analytics tab, click the **Select Form** button. The Published Form Search dialog box will open, displaying a list of published forms.
- 3. Select the desired form from the list, then click the Add Selected button.

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| Analytics Project Activity | | | | | |
|---|------------------|--------------|----------------|------------------------|--------------|
| | | | | | |
| Select Form O Please select form | | | | | |
| Published Form Sourch | | | | | |
| Published Form Search | | | | | |
| | | | | - | |
| QSearch | Choose form type | Ľ. | Date Created: | to: | |
| Theories 10 activities and of 181 | | | | | |
| Title | Study Name | Organization | Type | Created By | Date Created |
| TPTEF-5410 | | | empty | ovasilenko@ecisys.com | Apr 1, 2025 |
| TPTEF-5422 | | | 1 One question | ovasilenko@ecisys.com | Apr 1, 2025 |
| Mvr1_simple | | | empty | qatest1323@outlook.com | Mar 21, 2025 |
| yesvaform | | | 1 One question | qatest1323@outlook.com | Jan 30, 2025 |
| Cancel_Declined form_simple | | | empty | qatest1323@outlook.com | Mar 21, 2025 |
| MVR_Decline1 | | | empty | qatest1323@outlook.com | Mar 21, 2025 |
| InProgressSurvey1 | | | empty | qatest1323@outlook.com | Mar 18, 2025 |
| AttachementSuppFormRecurringForm_simple | | | 1 One question | qatest1323@outlook.com | Mar 21, 2025 |
| R2_Submitter2 | | | 1 One question | qatest1323@outlook.com | Mar 21, 2025 |
| AddAttachement | | | empty | qatest1323@outlook.com | Mar 21, 2025 |
| Show 10 w | | < < 1.2 | 34533 | | |
| headers 10 + | | | | | |

- 4. The selected form opens, displaying a table with form metadata and associated questions. The following icons are available above the table:
 - Search icon.
 - Filter icon
 - Choose from type dropdown.
 - Date Created to.

| B | RIAL NTERACTIVE 🛛 🔶 qa24 🐱 | · | | | | | | | o 📀 🤅 | testmailefeasibilty 🗸 |
|------------|---|----------------|-------|----------|-------------|---------------|---------------|----------------|----------------|-----------------------|
| » | Analytics Project Activity | | | | | | | | | |
| * | Select Form Selected form : TF | PTEF-5422 | | | | | | | | |
| Categories | 0 | <u>,</u> | | | | | | | | Q Search T |
| | Showing 2 entries out of 2 Recipient Email | Date responded | Score | Blockers | Attachments | RRST QUESTION | RIST QUESTION | FIRST QUESTION | FIRST QUESTION | Selected entries |
| | ovasilenko+1@ecisys.com | Apr 1, 2025 | 0 | No | No | sdfsd | dgzdfg | zdfgzdf | SDFSDF | SDFSDGS |
| | ovasilenko+2@ecisys.com | Apr 1, 2025 | 0 | No | No | | | | | |
| • | Show 10 ¥ | | | | | | | | | ø |
| • | | | | | | | | | | |

To Choose Form Type, follow these steps:

- 1. Select the option form the Show dropdown from the bottom left corner of table to manage the list of Form entries in the table.
- 2. Click the refresh icon to reset the changes and refresh the page.

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| Q.Search | Choose form type | - C | late Created: | 63 | 600 | | |
|---|---------------------------------------|---------------------|-------------------|-------------|--------------|--------------|-----|
| | Choose form type | 1 | | | | | |
| Dowing 10 entries out of 181 | 1 One question | | | | | | |
| Title | 3 All types - all required | ization | Туре | Created By | | Date Created | i i |
| TPTEF-5410 | Acknowledge questions | | empty | ovasilenkod | Pecisys.com | Apr 1, 2025 | _ |
| TPTEF-5422 | empty Monitoring Visit Form | | 1 One question | ovasilenkoś | Pecisys.com | Apr 1, 2025 | |
| Mvr1_simple | Multiple Choice | | empty | gatest1323 | Boutlook.com | Mar 21, 2025 | |
| yesvaform | Name2 | | 1 One question | gatest1323 | Boutlook.com | Jan 30. 2025 | |
| Cancel_Declined form_simple | name_2 New Surrelementary Form Min | | empty | gatest1323 | Boutlook.com | Mar 21, 2025 | |
| MVR_Dedine1 | Newformtype 14082024 | | empty | qatest1323 | Boutlook.com | Mar 21, 2025 | |
| InProgressSurvey1 | Q8A | | empty | gatest1323 | Boutlook.com | Mar 18, 2025 | |
| AttachementSuppFormRecurringForm_simple | rad ty | | 1 One question | qatest1323 | Boutlook.com | Mar 21, 2025 | |
| R2_Submitter2 | Regression2.7 | | 1 One question | gatest1323 | Boutlook.com | Mar 21, 2025 | - 1 |
| AddAttachement | Site Feasibility | | empty | gatest1323 | Boutlook.com | Mar 21, 2025 | - |
| ihow 10 👻 | Supplementary Forms Test Form | « < 1 2 3 | 4 5 > » | | | | c |
| | Testing 123 | | | | | | |

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

10.1.1 Export Form

This allows you to export the form into CSV file.

To export a Form, follow these steps:

1. Click the Export Form icon on the toolbar of a Reports dashboard.

| | RIAL NTERACTIVE 🕈 qa24 🗸 | | | | |
|------------|---|----------------|-------|----------|-------------|
| » | Analytics Project Activity | | | | |
| + | Select Form Selected form : TPTE | F-5422 | | | |
| Ē | Export Form Showing 2 entries out of 2 | | | | |
| | Recipient Email | Oate responded | Score | Blockers | Attachments |
| | ovasilenko+1@ecisys.com | Apr 1, 2025 | 0 | No | No |
| ** | ovasilenko+2@ecisys.com | Apr 1, 2025 | 0 | No | No |
| « ; | Show 10 V | | | | |
| | | | | | |

- 2. The Export Form window opens which display the following checkboxes: Please, specify appropriate type of export file:
 - MS Excel File
 - Simple comma-separate values
 - Form Title: Selecting this checkbox displays the form title in an Excel file.
 - Current Export Date: Selecting this checkbox displays the current date and time of the export in the Excel file.

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3. 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.

| Analytics Project Activity | | | | | | |
|----------------------------------|----------------|---------|----------|--------------------|--------------------|------------------|
| Select Form Selected form - TPTE | F-5422 | | | | | |
| 0 | | | | | | |
| Recipient Email | Date responded | © Score | Blockers | Attachments | PIRST QUESTION | • FIRST QUESTION |
| ovasilenko+1@ecisys.com | Apr 1, 2025 | 0 | No | No | sdfsd | dgzdfg. |
| ovasilenko+2@ecisys.com | Apr 1, 2025 | 0 | No | No | | |
| | | | Exp | oort Form Into CSV | File | |
| | | | | Processing form | records for report | J |

10.1.2 Report Configuration

Clicking the Gear icon on the toolbar of the Report Dashboard opens the Report Configuration dialog box, which allows you to configure the report settings.

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Report Configuration contains:

- Available Columns: This panel contains a Search box to search for the column fields and the cells of Contact Field type with the button in blue color. These contact fields are defined in Settings→ Contact Settings.
- Visible Columns: This panel displays the cells of Metadata type in red color and the cells of Question type in Violet color.
- 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.

| INTERACTIVE * 9824 · | | | () () () () () () () () () () () () () (|
|---|-----------------|-----------------|--|
| Analytics Project Activity Select Form Selected form : TPTEF-5410 | | | |
| | Report C | onfiguration | |
| Available Columns | | Visible Columns | |
| | Ofwert | Recipient Email | Metadar |
| | Gsearch | Date responded | Metadat |
| [Contact] First Name | Contact Field | Score | Metada |
| [Contact] Last Name | Contact Field | Blockers | Metada |
| [Contact] Role | Contact Field | Attachments | Metada |
| [Contact] Organization | Contact Field | TEst1 | Questio |
| [Contact] Phone | Contact Field | | |
| (Contact) date | Contact Field | | |
| [Contact] numbers | Contact Field | | |
| [Contact] Tech Docs | Contact Field | | |
| [Contact] Sale | Contact Field | | |
| [Contact] Domain | Contact Field | | |
| [Contact] J Paper | Contact Field | | |
| [Contact] Testfield | Contact Field | | |
| (Contact) numberfield | Contact Field V | | |
| To add a new custom field, type here. | Note | | |
| | | | |

2.1 Adding Fields from Available Columns to Visible Columns

To add Fields from Available Columns to Visible Columns, follow these steps:

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- 1. In the Report Configuration dialog box, locate the Available Columns panel.
- 2. Drag and drop the desired fields from the Available Columns panel to the Visible Columns panel.
- 3. The selected fields will appear in the report table and will also be included in the exported Excel file.
 - To change the display order, drag and drop fields within the Visible Columns panel to rearrange their sequence.
 - You can also rearrange fields in the Available Columns panel if needed.

| | RACTIVE 🕈 qa24 🗸 | | | | | | 0 | <u>ر</u> | ۲ |
|-----|--------------------------------------|----------------|------|---------------|----------|-----------------|---|----------|----------|
| * - | Analytics Project Activity | | | | | | | | |
| ۵ | Juccional Juccionalis, in terophy | | | | Report | onfiguration | | | |
| • | Available Columns | | | | | Visible Columns | | | |
| - | | | | c | Search | Recipient Email | | | Metadata |
| - 1 | | | | | | Date responded | | | Metadata |
| ~ | [Contact] First Name | | | Contact Field | i | Score | | | Metadata |
| ~ | [Contact] Last Name | | | Contact Field | tt Field | Blockers | | | Metadata |
| | [Contact] Role | | | Contact Field | | Attachments | | | Metadata |
| | [Contact] Organization | | | Contact Field | _ | TEst1 | | | Question |
| | [Contact] Phone | | | Contact Field | | | | | |
| | [Contact] numbers | [Contact] date | | | _ | Contact Field | | | |
| | [Contact] Tech Docs | | | Contact Field | | Drag and drop | | | |
| | [Contact] Sale | | | Contact Field | | from Available | | | |
| | [Contact] Domain | | | Contact Field | | Visible Columns | | | |
| | [Contact] J Paper | | | Contact Field | | | | | |
| | [Contact] Testfield | | | Contact Field | | | | | |
| | [Contact] numberfield | | | Contact Field | Ŧ | | | | |
| | To add a new custom field, type here | | Note | | ~ | | | | |

2.2 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.

| Rvaliable Columns | | Visible Column |
|--------------------------------------|-----------------|-----------------|
| | O Search | Recipient Email |
| | Quanta | Date responded |
| [Contact] First Name | Contact Field | Score |
| [Contact] Last Name | Contact Field | Blockers |
| [Contact] Role | Contact Field | Attachments |
| [Contact] Organization | Contact Field | TEst1 |
| [Contact] Phone | Contact Field | |
| [Contact] numbers | Contact Field | |
| [Contact] date | Contact Field | |
| [Contact] Tech Docs | Contact Field | |
| [Contact] Sale | Contact Field | |
| [Contact] Domain | Contact Field | |
| [Contact] J Paper | Contact Field | |
| [Contact] Testfield | Contact Field | |
| (Contact) numberfield | Contact Field 🔻 | |
| To add a new custom field, type here | Note 👻 | |
| | Note | |

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2.3 Adding Custom Fields as Formula

To add 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.

| Available Columns | N | isible Columns/ |
|--------------------------------------|----------------------|-----------------|
| | Q Search R | ecipient Email |
| | D | ate responded |
| [Contact] First Name | Contact Field Sc | ore |
| [Contact] Last Name | Contact Field B | ockers |
| [Contact] Role | Contact Field A | tachments |
| [Contact] Organization | Contact Field Ti | ist1 |
| [Contact] Phone | Contact Field | |
| [Contact] numbers | Contact Field | |
| [Contact] date | Contact Field | |
| [Contact] Tech Docs | Contact Field | |
| [Contact] Sale | Contact Field | |
| [Contact] Domain | Contact Field | |
| [Contact] J Paper | Contact Field | |
| [Contact] Testfield | Contact Field | |
| [Contact] numberfield | Contact Field | |
| To add a new custom field, type here | Formula | |
| | Note | |
| | Formula Save and Clo | se |

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

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| Available Columns | |
|--------------------------------------|---------------|
| | Q Search |
| add | Formula 🖋 🗙 |
| [Contact] First Name | Contact Field |
| [Contact] Last Name | Contact Field |
| [Contact] Role | Contact Field |
| [Contact] Organization | Contact Field |
| [Contact] Phone | Contact Field |
| [Contact] date | Contact Field |
| [Contact] numbers | Contact Field |
| [Contact] Tech Docs | Contact Field |
| [Contact] Sale | Contact Field |
| [Contact] Domain | Contact Field |
| [Contact] J Paper | Contact Field |
| [Contact] Testfield | Contact Field |
| To add a new custom field, type here | Formula |

4. Create formula for the question using the functions.

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

| Symbol | Function | Symbol | Function |
|--------|--------------------------|--------|---|
| = | Equal to (==) | + | Add |
| ¥ | Not Equal to (! =) | — | Minus |
| > | Greater than | × | Multiply |
| < | Smaller than | ÷ | Divide |
| 2 | Greater than equal to | lal | Percentage % |
| 1 | Smaller than equal to | () | (Your condition). You can define your own conditions in the formula. |

- 6. Click Apply and 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:

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- On creating custom field additional property for the survey, all surveys for specified form are able to store some information in new property.
- The new added custom fields are editable which allows you to enter the value for the field dynamically.

10.1.3 Search

Users can search for specific form reports by entering the **recipient's name** in the search box above the report table and clicking the **Search** icon.

This allows users to quickly filter and locate reports related to particular recipients.

| | ? Č ⁷ | · · · · · · |
|-------------------------|-------------------------|------------------|
| | | |
| | | Q Search |
| Ø FIRST QUESTION | 9 FIRST QUESTION | Selected entries |
| zdfgzdf | SDFSDF | SDFSDGS |
| | | |

10.1.4 Filter

The Filter option allows you to search for a specific form report by applying filters to the columns in the table.

To apply a filter, follow these steps:

Click the Filter icon on the toolbar. Textboxes will appear below each column header in the report table.
 Enter the desired filter criteria in the appropriate textbox and press Enter. The report will display results matching the entered filter.

| | RIAL NTERACTIVE 🛛 🕇 9424 👻 | | | | | | | | T 🖉 | (a) International State State - • |
|-----|---|----------------|---------|------------|---------------|-----------------|-----------------|-------------------|------------------|-----------------------------------|
| * | Analytics Project Activity | | | | | | | | | |
| + | Select Form Selected form : TPI | ¥F-5422 | | | | | | | | |
| | © • | | | | | | | | | Q Search |
| _ | Showing 2 entries out of 2 © Electrolemit Ermail | Date responded | Q Score | 9 Blockers | Q Attachments | 9 DEST OUESTION | O DEST OUESTION | Q EIEST OLIESTION | Q EIEST OUESTION | Selected entries |
| • | x | | | ~ | | | | | | |
| | ovasilenko+1@ecisys.com | Apr 1, 2025 | 0 | No | No | sdfsd | dgrdfg | adfgadf | SOFSOF | SDFSDGS |
| | ovasilenko+2@ecisys.com | Apr 1, 2025 | 0 | No | No | | | | | |
| \$0 | Show 10 ¥ | | | | | | | | | 0 |
| • | | | | | | | | | | |

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10.2 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
 - Date
 - Show Results in the top left corner.

| U R | | /E 🔶 qa24 🐱 | | | | | 0 | Č, | Internet and the second second |
|------------|-----------|-------------------------------|--------------|----------|--|-----------|------------------------------------|-----------------------------|---|
| * + | Analytics | Project Activity | | | | | | | |
| | Id | ✓ User | v Da | te | v 🖪 | | Show 100 | | x 🗸 result |
| | ld♠ | User | Date | Time | Activity | Old Value | New Value | | |
| | 17492333 | testmailefeasibilty@gmail.com | Apr 17, 2025 | 17:36:22 | updateNodeProperties | | | | |
| • | 17492332 | testmailefeasibilty@gmail.com | Apr 17, 2025 | 17:36:22 | updateNodeProperties | | | | |
| | 17492331 | testmailefeasibilty@gmail.com | Apr 17, 2025 | 17:36:22 | updateNodeProperties | | | | |
| - | 17492330 | testmailefeasibilty@gmail.com | Apr 17, 2025 | 17:36:22 | Update form data | | | | |
| | 17492311 | testmailefeasibilty@gmail.com | Apr 17, 2025 | 16:57:16 | Update form data | | | | |
| • | 17492299 | testmailefeasibilty@gmail.com | Apr 17, 2025 | 16:56:33 | Update form data | | | | |
| _ | 17492261 | testmailefeasibilty@gmail.com | Apr 17, 2025 | 15:41:04 | Update Integration Settings For Form: TPTEF-5410 | .0. | -0- | | |
| • | 17492239 | testmailefeasibilty@gmail.com | Apr 17, 2025 | 14:54:57 | Create new question | | "(Question posi Address 2, Ansi | tion+7, Que ver Type+8)' | stion Title+Institution |
| | 17492238 | testmailefeasibilty@gmail.com | Apr 17, 2025 | 14:54:56 | Create new question | | "(Question posi Name, Answer | tion=5. Que Type=8}* | stion Title+Institution |
| | 17492237 | testmailefeasibilty@gmail.com | Apr 17, 2025 | 14:54:56 | Create new question | | "(Question posi Number, Answi | tion=15, Qu ar Type=8}" | estion Title+Phone |
| | 17492236 | testmailefeasibilty@gmail.com | Apr 17, 2025 | 14:54:56 | Create new question | | "(Question posi Level, Answer T | tion=12, Qu ype=8)" | estion Title+Education |
| | 17492235 | testmailefeasibilty@gmail.com | Apr 17, 2025 | 14:54:56 | Create new question | | "(Question posi Answer Type=8 | tion=1, Que)* | tion Title=Last Name, |

2. The Report Parameter icon next to the filters allows you to download the report.

- 3. The table displaying the **activity on a form** includes the following columns:
 - ID: The unique identifier of the activity performed on the form.
 - User: The name of the user who performed the activity.
 - **Date**: The date on which the activity was performed.
 - Time: The time at which the activity was performed.
 - Activity: A description of the activity that was carried out.
 - **Old Value**: The value present in the form before the update.
 - New Value: The value in the form after it was updated.

10.2.1 The ID, User and Date Filters

- The ID filter provides two textboxes: ID From and ID To, which allow you to filter and search activities based on a specific ID range.
- The User filter provides a single textbox that allows you to search activities by username.
- The Date filter provides two textboxes: Date from and Date To, which allow you to filter activities based on a specific date range.

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| Analytics Project Activity | | | |
|----------------------------|--------------|----------|---------------------|
| ld [12345-] 🗙 🗸 User | Date | | ► |
| Id from: 12345 × | Date | Time | Activity |
| Id to: | Apr 24, 2020 | 16:58:43 | Add Form Type |
| | Apr 24, 2020 | 16:58:48 | Add Form Type |
| 15076443 n | Apr 24, 2020 | 16:58:49 | Add Form Type |
| 15076637 n | Apr 24, 2020 | 16:59:10 | Create new question |
| 15076638 n | Apr 24, 2020 | 16:59:10 | Create new question |
| 15076639 | Apr 24, 2020 | 16:59:10 | Create new guestion |

10.2.2 Report Parameters

The **Report Parameters** option allows you to download the **Project Activity Report** based on the filters and parameters you specify.

To Download the Report, follow these steps:

- 1. From the Project Activity tab, click the Report Parameters icon. The Report Parameters dialog box will open.
- 2. Enter the desired parameters for which you want to generate the activity report.
- 3. Click **Get Report**. The report will be downloaded as an .xlsx file, containing the records that match the specified parameters.

| | | a 🗸 | | | | |
|------------|-----------------------|-------------|-----------|------------|----------|-----------|
| * + | Analytics Project Act | ivity | | | | |
| | Id | ↓ User | v Date | | ~ B | |
| | ld∳ User | | Date | Time | Activity | Old Value |
| | 15076441 | Report para | meters | | | |
| | 15076443 | | User: | | | |
| * | 15076637 | | ate from: | | | |
| 0 6 | 15076638 | | Date to: | | | |
| | 15076639 | | Id from: | | | |
| | | | Id to: | | | |
| | 15076640 | | Show: 100 | | × | |
| | 15076641 | | | | | |
| | 15076642 | | | | | |
| | 15076643 | | Cancel | Get Report | | |

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