TRIAL INTERACTIVE

EFEASIBILITY V2.7 – MANAGER USER GUIDE V 0.1

TRANSPERFECT
LIFE SCIENCES

APPROVALS

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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, mobile-enabled 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 Supported**	**Recommendations**
Browsers	Internet Explorer 10, Internet Explorer 11, Chrome, Firefox, Opera, Safari.	Internet Explorer versions < 10	Chrome (for PC), Firefox (for Mac)
Operating Systems	Windows (Vista and later versions)	Windows XP and earlier	Windows OS
Additional Requirements	Adobe Reader 7.0 or 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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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.
4. 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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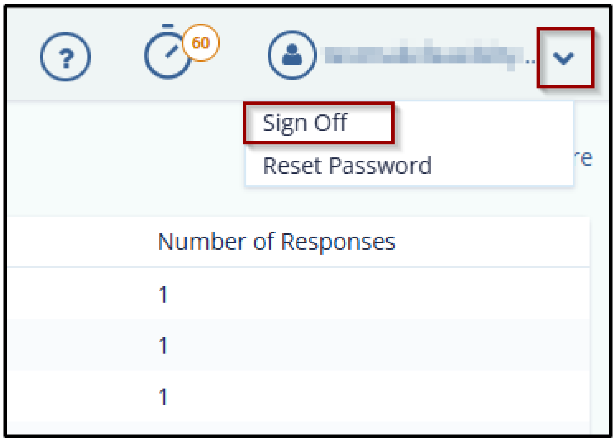
2.4 Log out / Sign out

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**.



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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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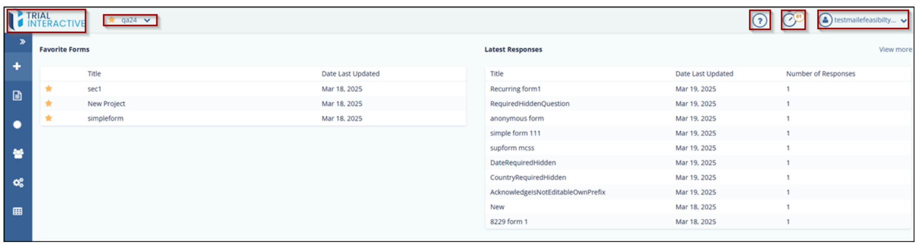
4. EFEASIBILITY DASHBOARD

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**



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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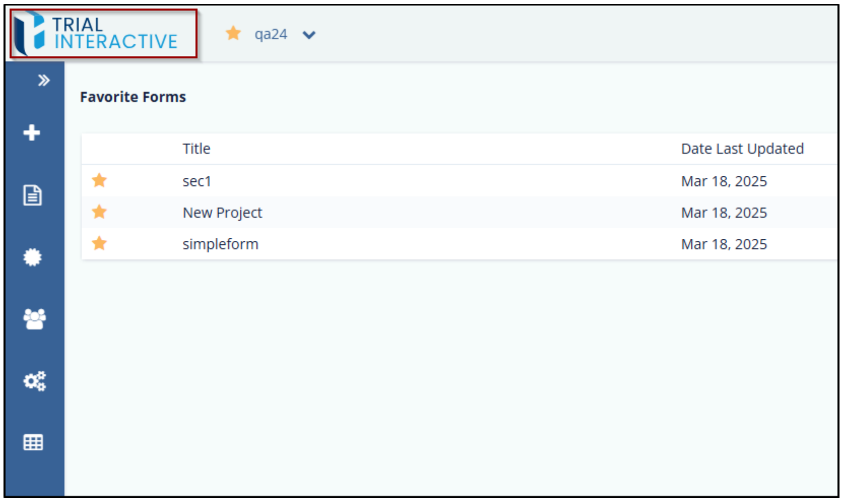
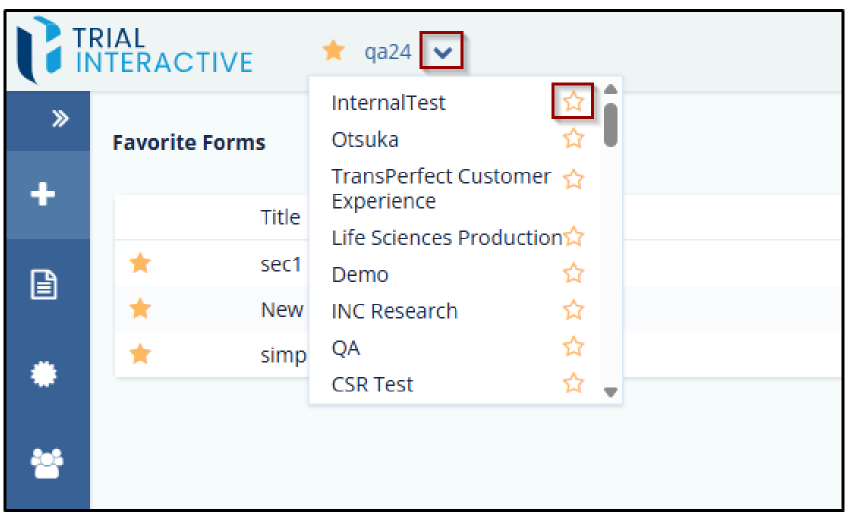


4.1.2 Dropdown

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.



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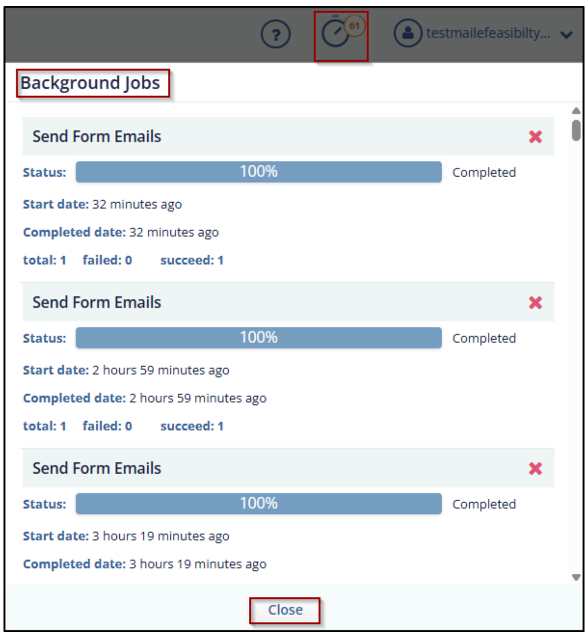
To switch a project, follow these steps:

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.



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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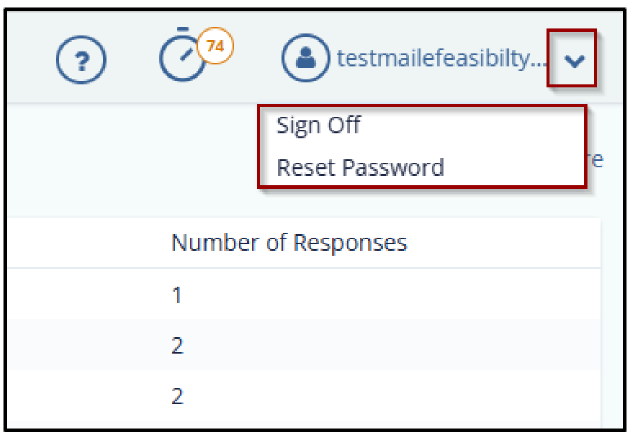
- Counts of total, successful and failed emails

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.



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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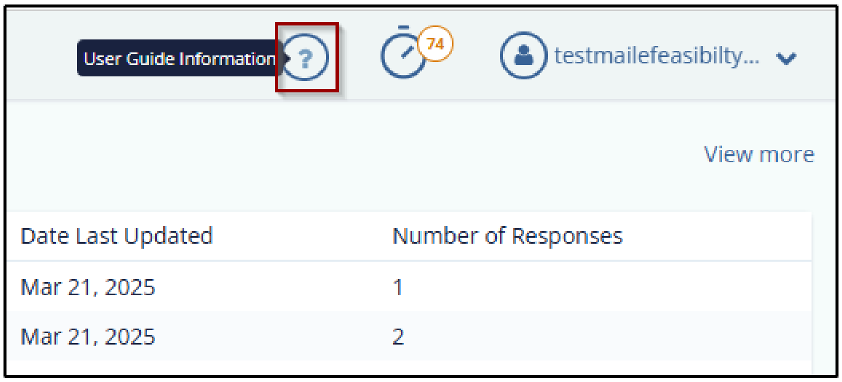

4.2 Tiles

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

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

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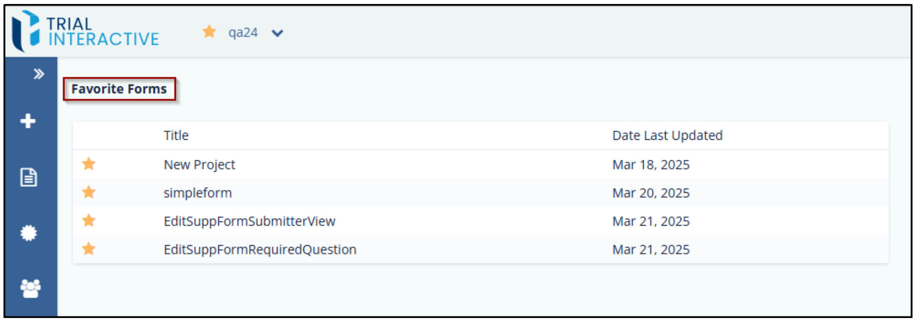
4.2.1 Favorite Forms

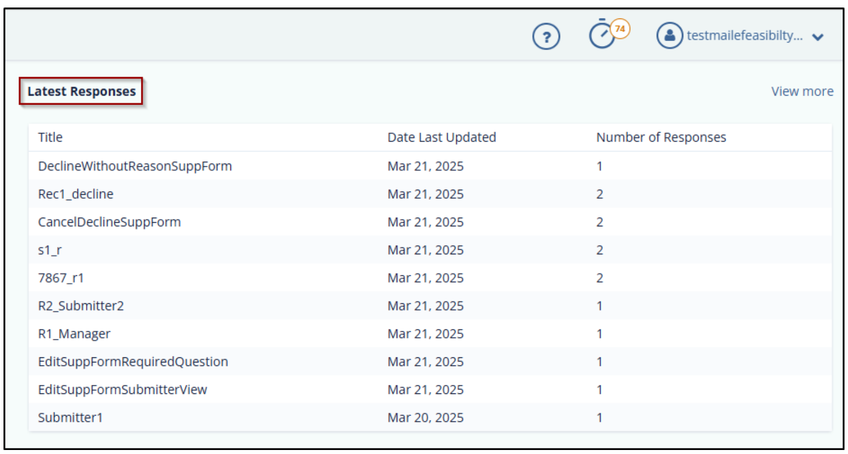
The table under Favorite Forms Tile summarizes a list of favorite forms in the project. Each favorite form is designated with a star icon to the left of the form Title. You can also remove a form from the favorite list by clicking a star and making it un-favorite. Click a row in the table to open the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



	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.



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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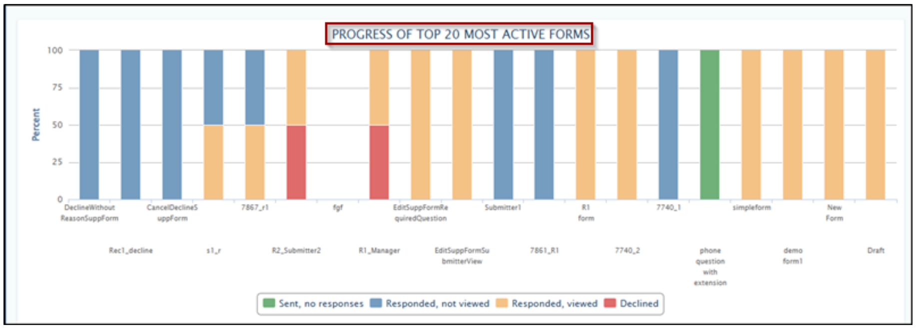
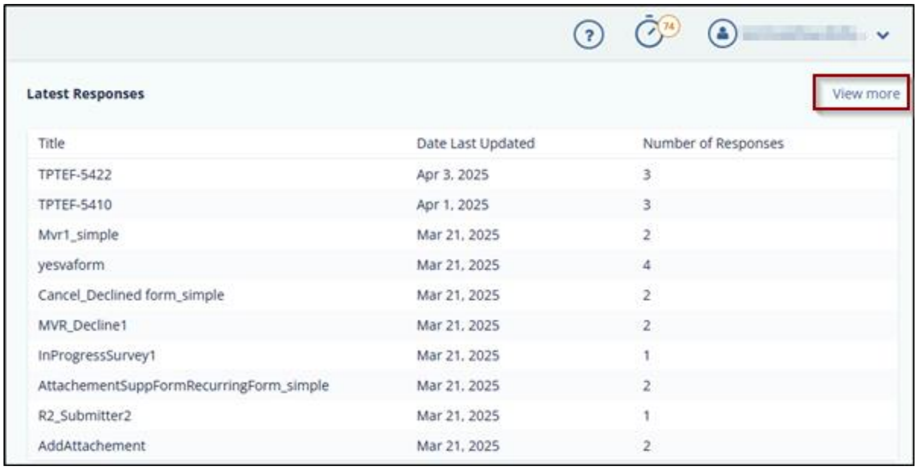
4.2.3 Progress of Top 20 Most Active Forms

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.



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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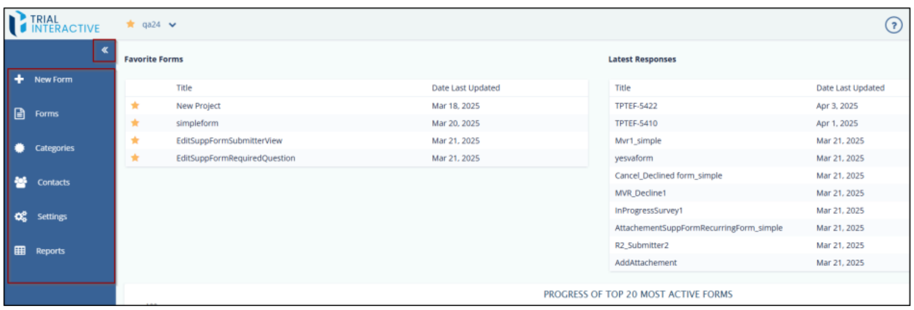
4.3 Toggling Sidebar Navigation

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.



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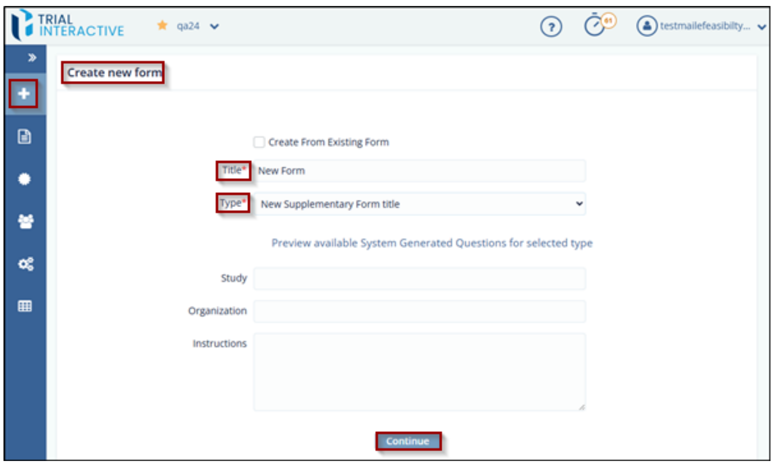
5. NEW FORM

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.



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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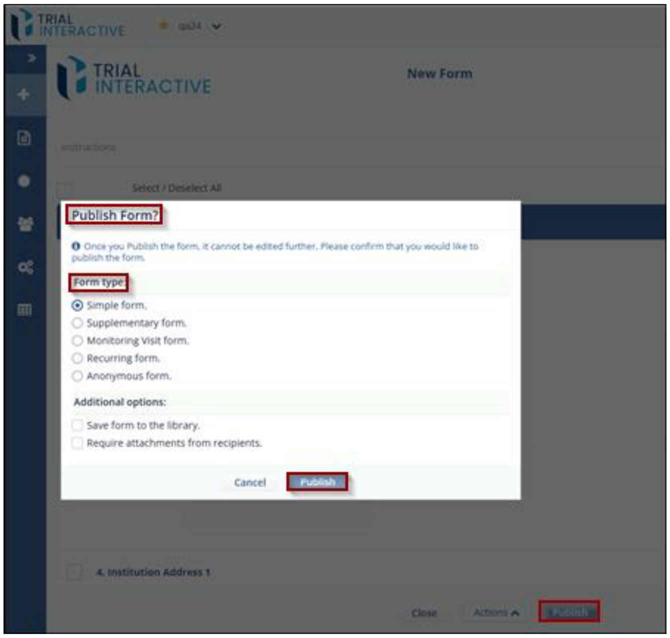

5.2 Changing Logo

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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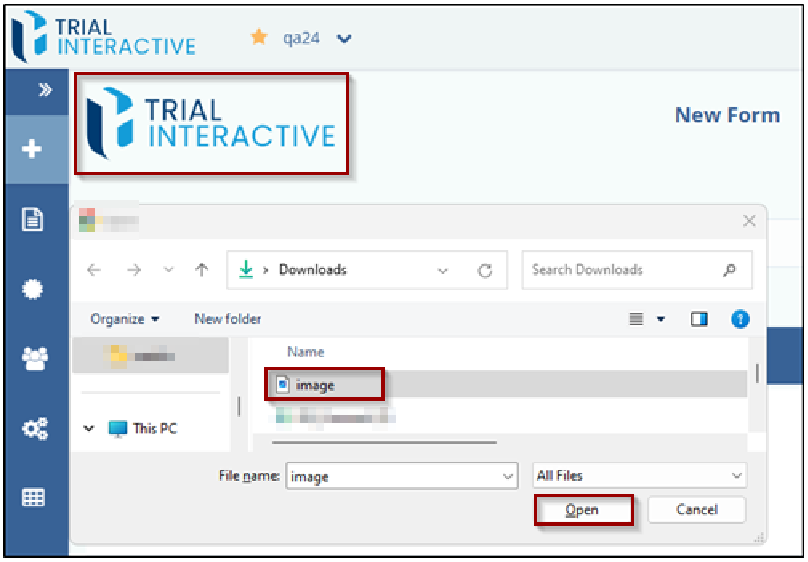

5.3 Add Question to a Form

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-XXX-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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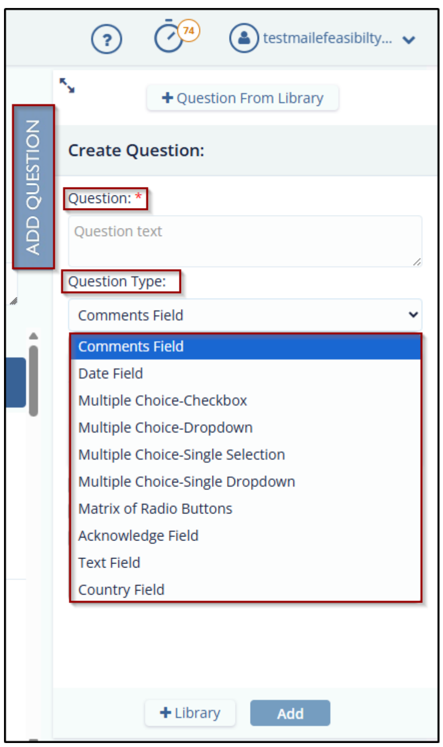
5.3.1 Creating Question from Add Question Tab

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.
4. 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.



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

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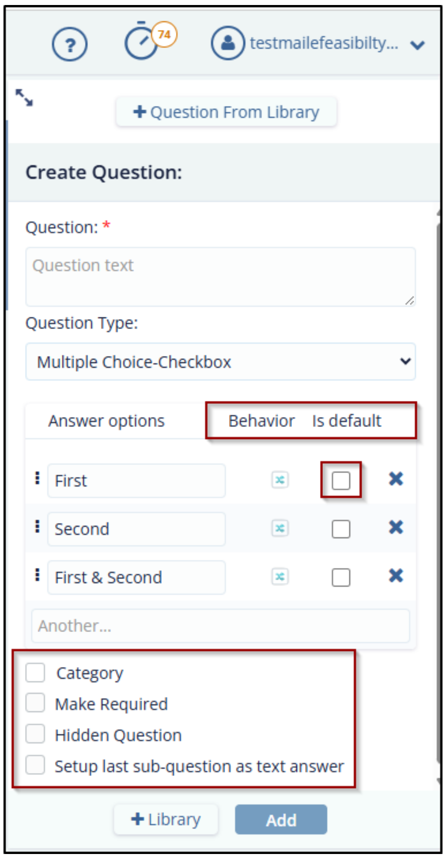
6. Select a **Checkbox** under the **Is Default** column for one of the options. Observe that selecting one disables the others, allowing only one default option.
7. Set Additional Question Properties:
   - **Category**: Assign a category for organizing the question.
   - **Make Required**: Check this 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.



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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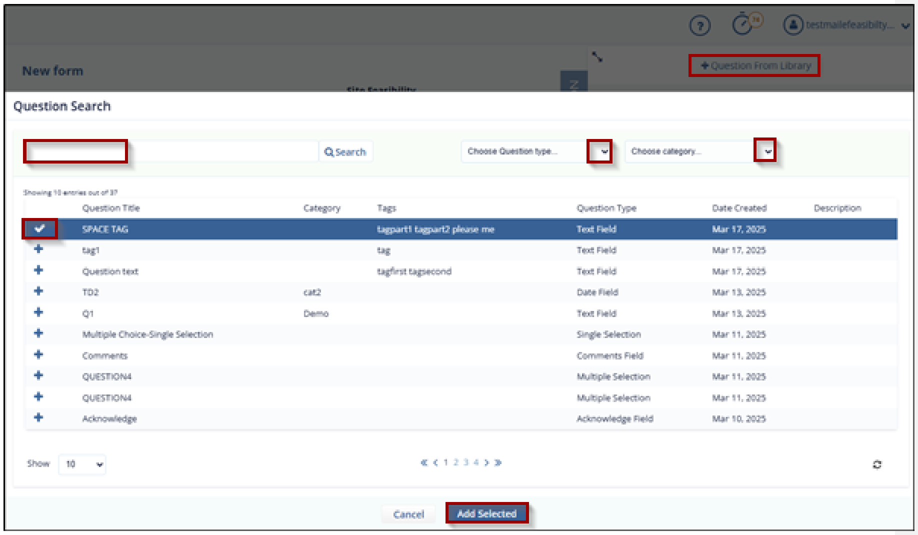
5.3.2 Adding a Question from Library

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.
3. 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**.



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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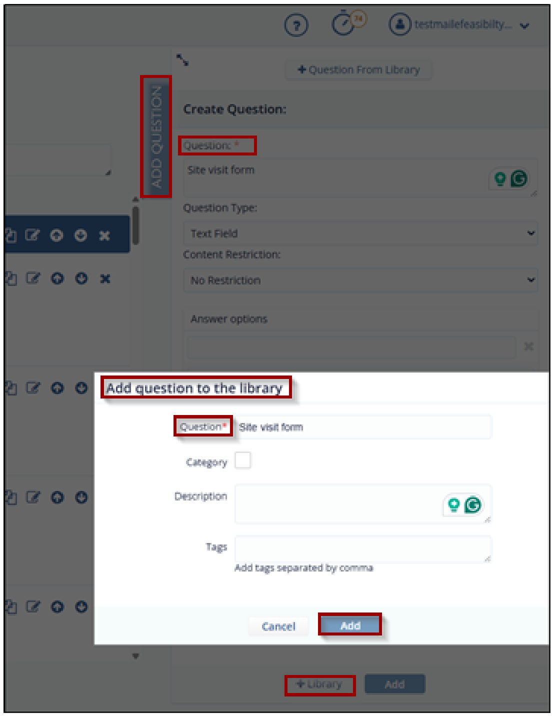

5.4 Add a Section to a Form

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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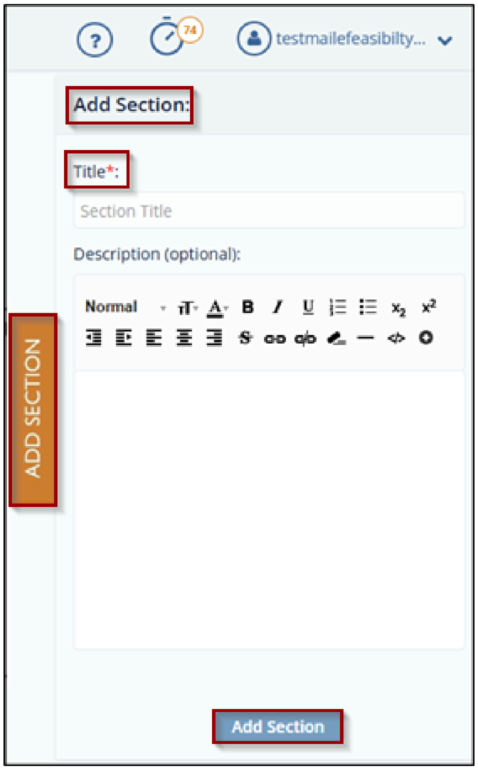

5.5 Adding Instructions to a Form

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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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.
6. 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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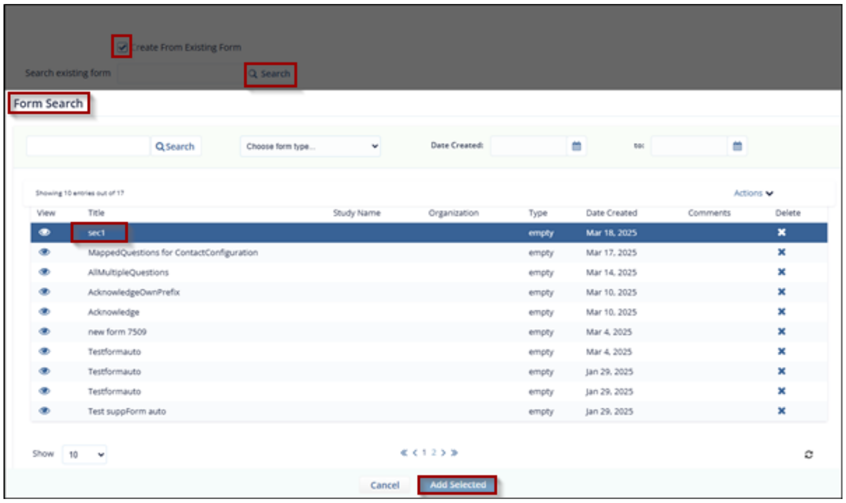
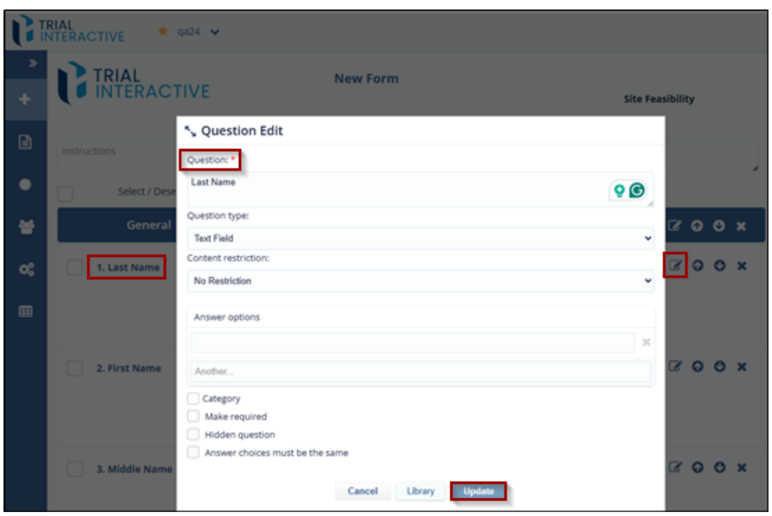


5.7 Editing the Question

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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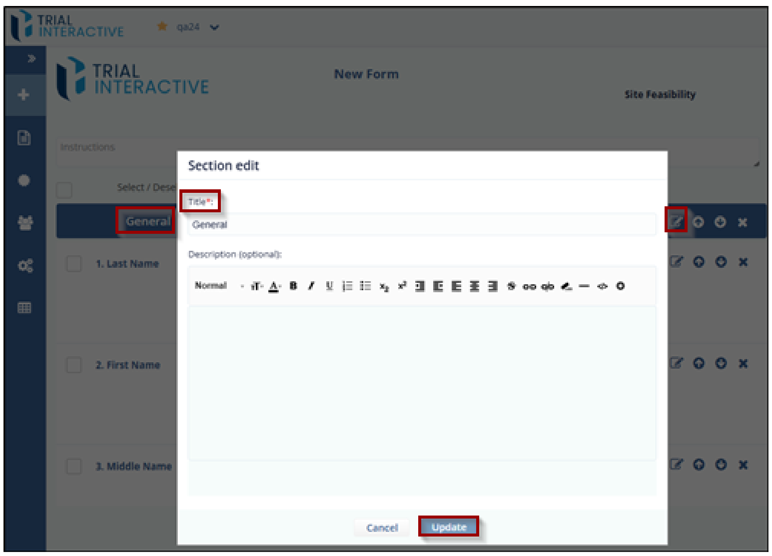
5.8 Editing the Section

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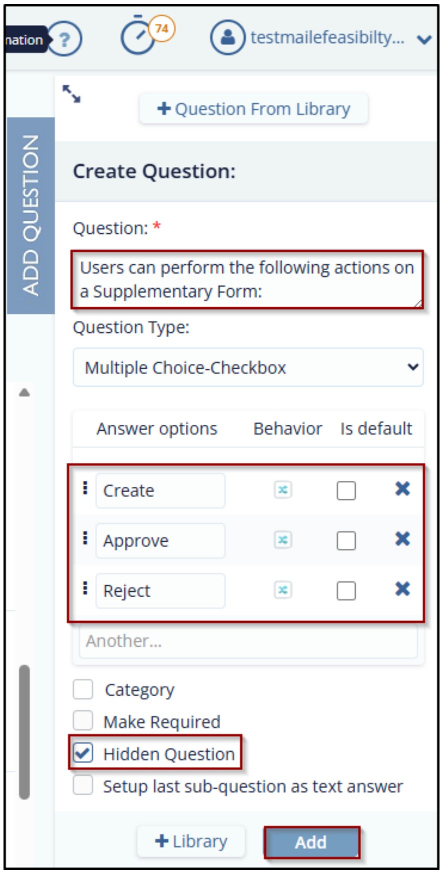
to question types other than Multiple Choice questions displayed in a survey.

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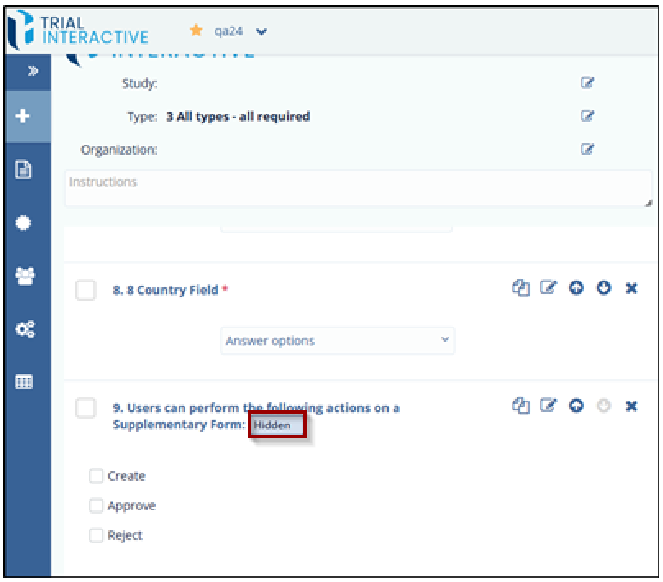
6. To make the question visible again, follow the steps below:
    - Select the question that you want it visible. Click the Edit icon next to the Question. The Question Edit dialog box is displayed.
    - Unselect the checkbox next to Hidden Question. Click the Update button. Refer to the screenshot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



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.

1. Click **Edit** icon next to the Question to which you want to apply logic to make the Hidden Question visible. The Edit Question popup window is displayed.
2. Click the Behavior icon next to the answer option for which you want to make the hidden question visible. Refer to the screenshot below.
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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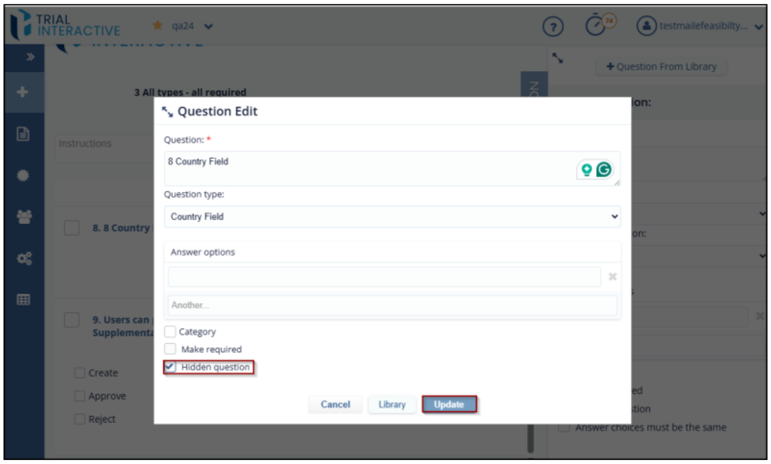
7. You are redirected to the Edit Question page.
8. Click **Update** to save the changes. You are redirected to the Form Draft Page.



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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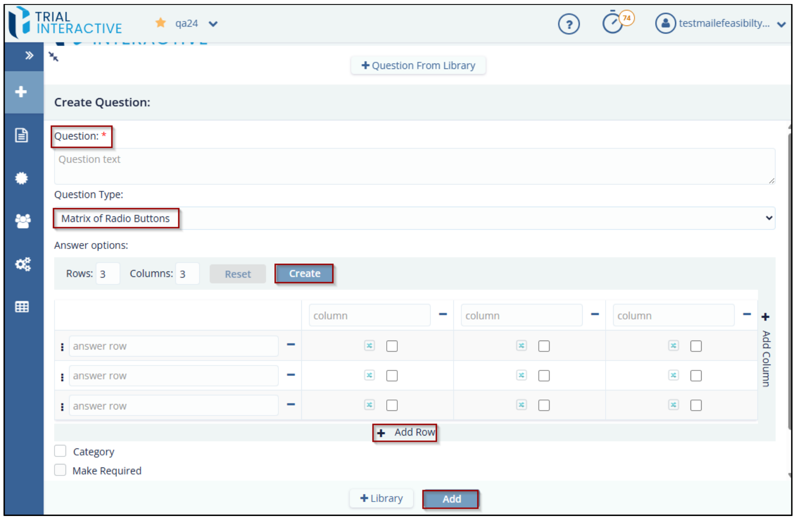

6. Click the **Behavior** icon to view and select the visibility of the questions.
   - **Position**: The position of the question.
   - **Questions**: Available questions in the Form.
   - **Visibility**: The options **Visible**, **Hidden** and **Inactive** to change make the question hidden. Refer to the screenshot below.
7. Select the visibility of the question by clicking the **Invisible** button. Refer to the above screenshot.
8. Click **Apply**. You are redirected to the Question Edit popup window.
   Note: To select a checkbox for an answer, only one answer per row and per column can be selected.
9. Click **Update**. The question with matrix radio buttons is displayed in the form. Refer to the screenshot below.
10. The answer options can be selected as default options. If you want to add default answer - select checkbox or unselect it to cancel default answer. Only one answer option per row and per column can be selected.

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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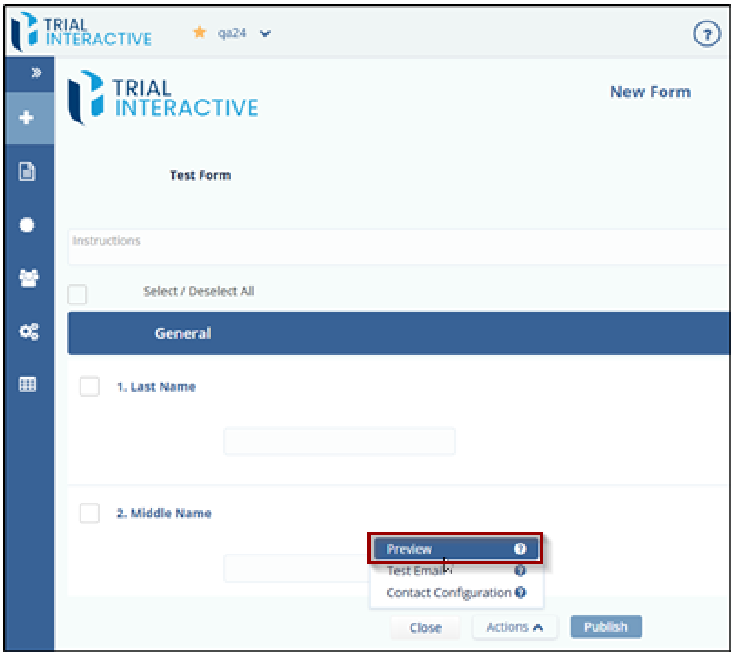
5.10.1 Previewing Forms

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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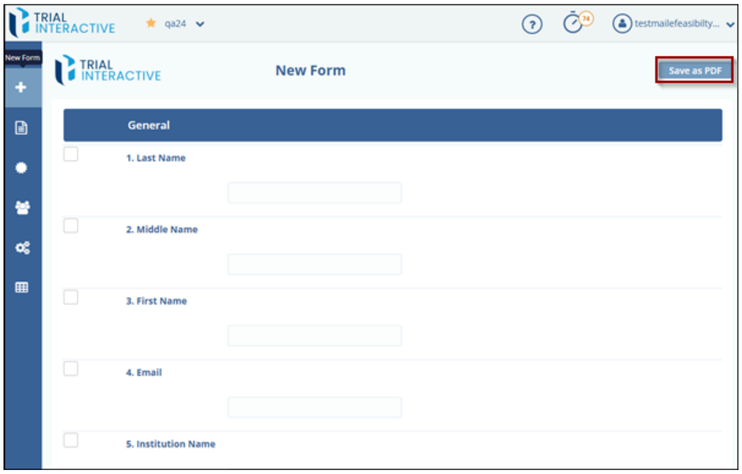
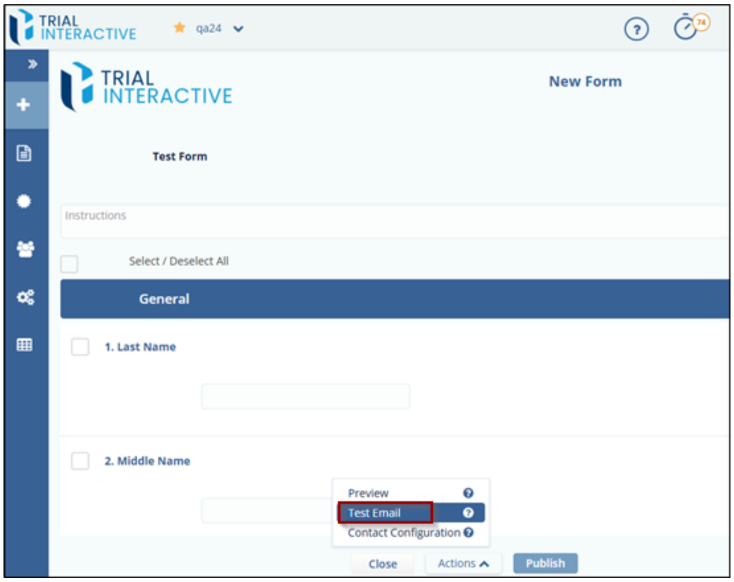


5.10.2 Test Email

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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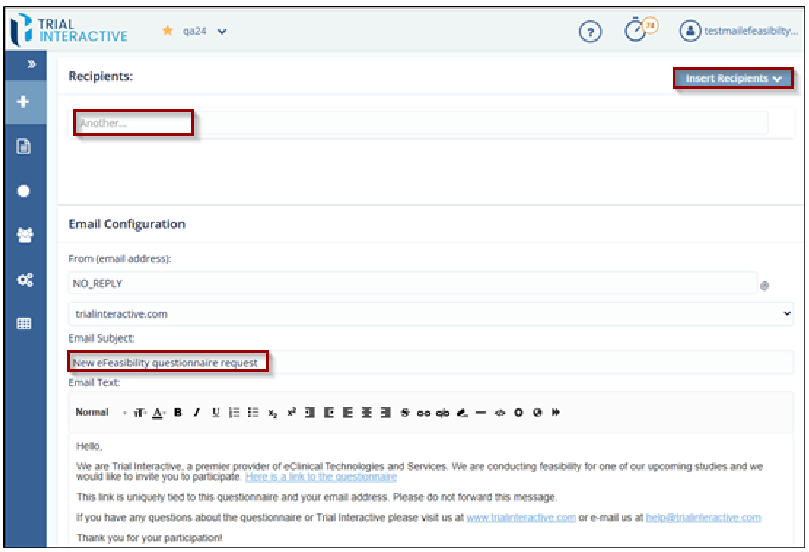
To send a Test Email, follow these steps:

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.



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 pre-populated in the form making all mapped fields non-editable.
When a response is sent by the submitter, the Contact information is saved, and the survey is visible to the manager in the Contacts tab from the Menu Bar.

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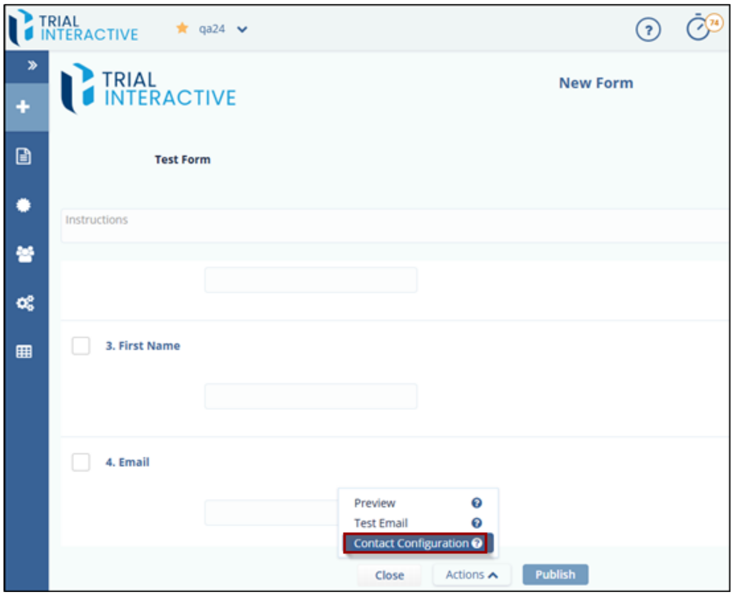

To map the Contact information, follow these steps:

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

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

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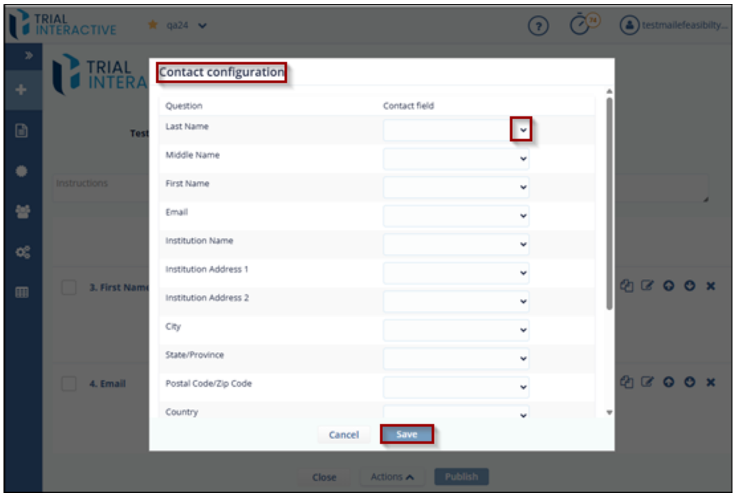

5.11 Publishing Forms additional option

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:

1. Click the Publish button in the Form Draft page displayed at the bottom of the screen. The Publish Form? dialog box opens which displays a message asking for confirmation to publish form along with the following form types:
    - **Simple Form**
    - **Supplementary Form**
    - **Monitoring Visit Form**
    - **Recurring Form**
    - **Anonymous form**
2. And Additional options with checkboxes
    - **Save form to the library**
    - **Require attachments from recipients**

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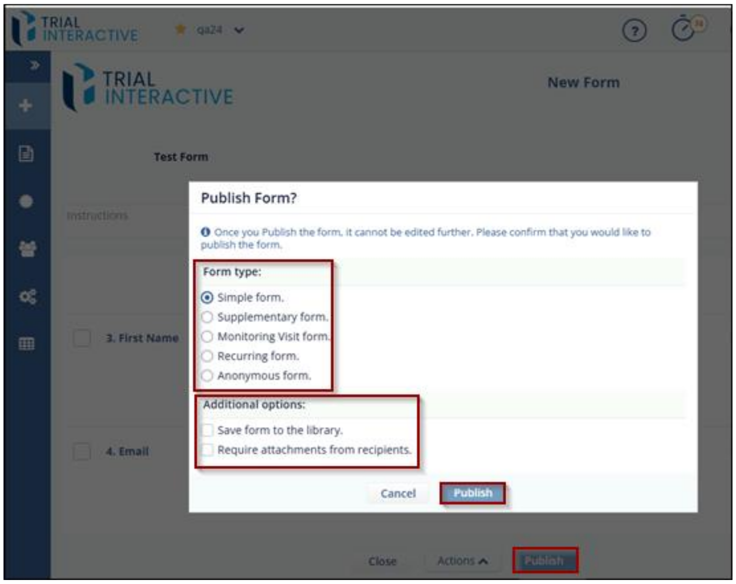

3. Select the required checkbox and then click the Publish button to publish the form. Refer to the screenshot below.

    - 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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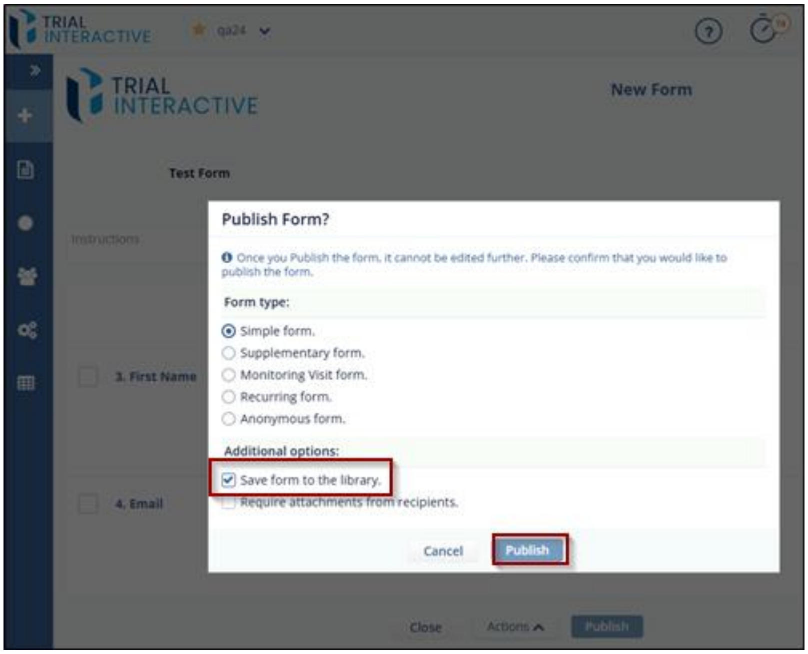

5.11.2 Require Attachments from Recipients

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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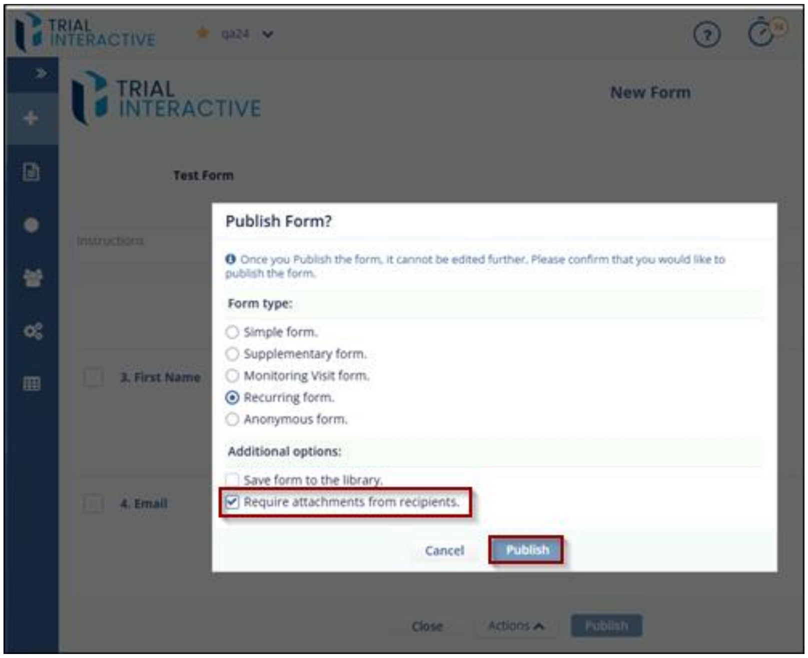

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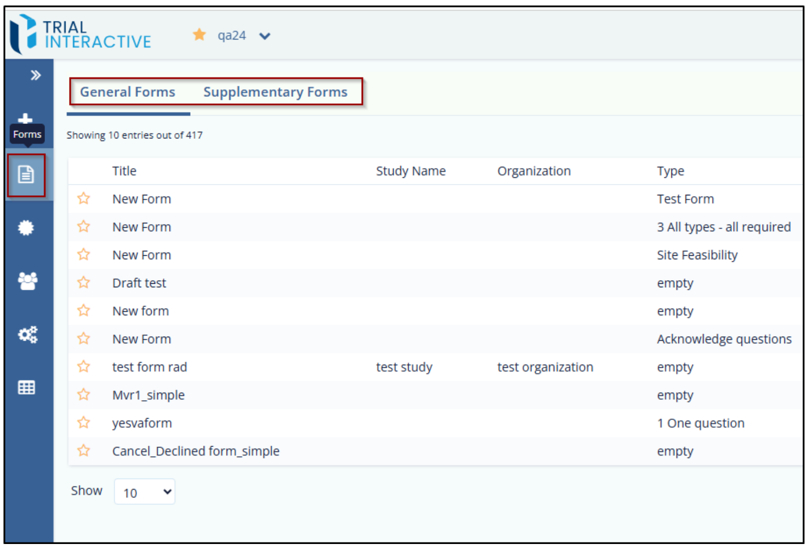
6. FORMS

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**



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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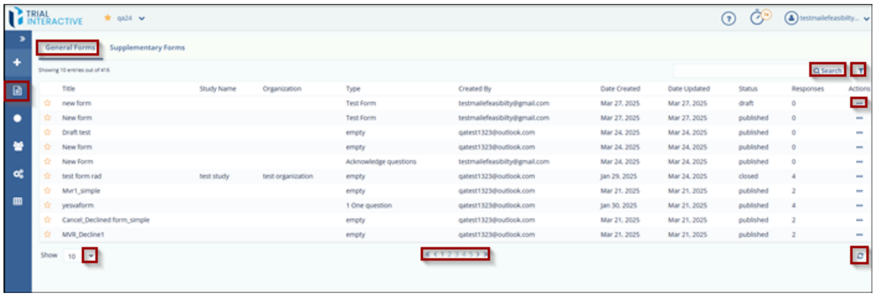
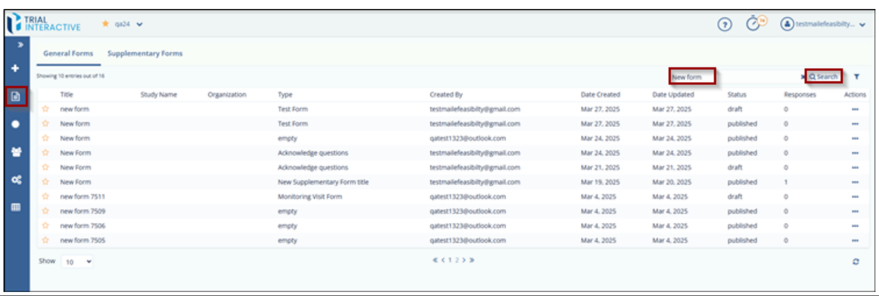


6.1.2 Searching for Forms

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.



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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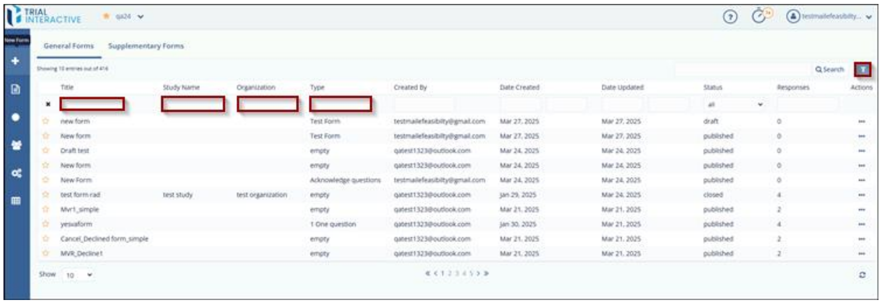
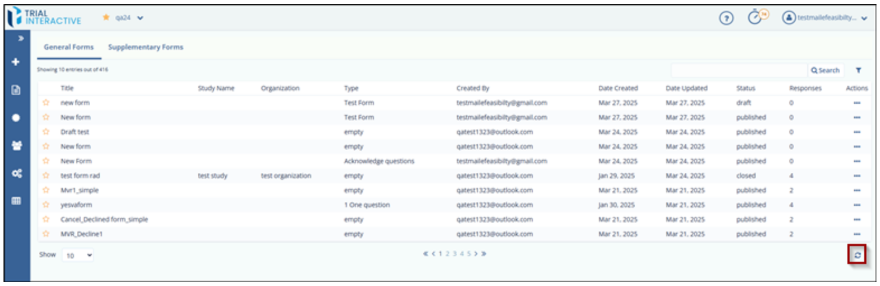


6.1.4 Refreshing Forms Page

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.



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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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.

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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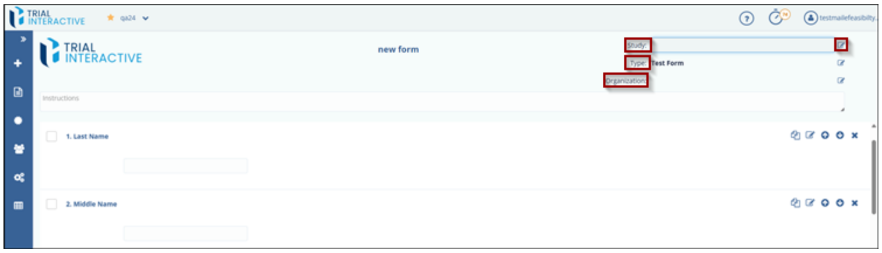
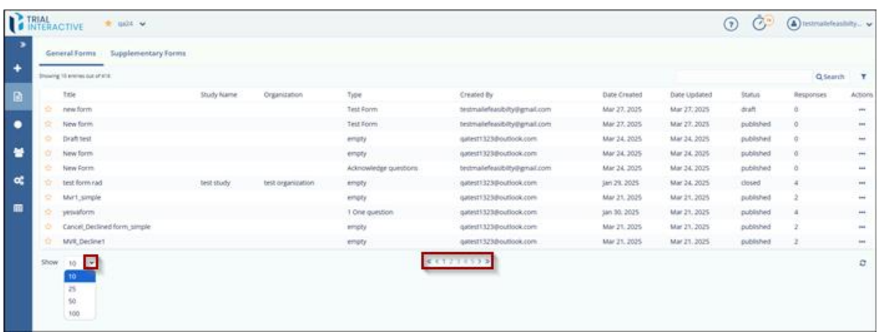


6.1.8 Adjusting the Forms List Display

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



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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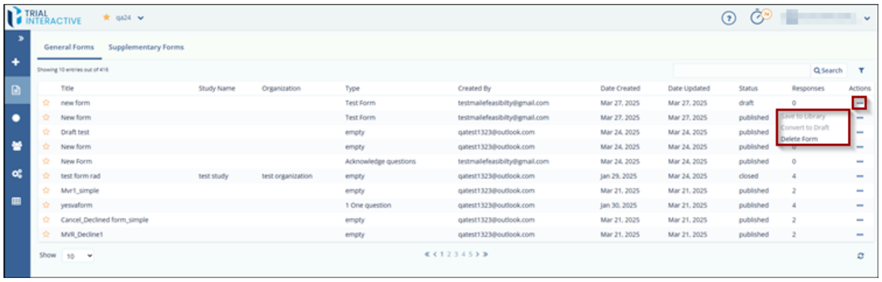


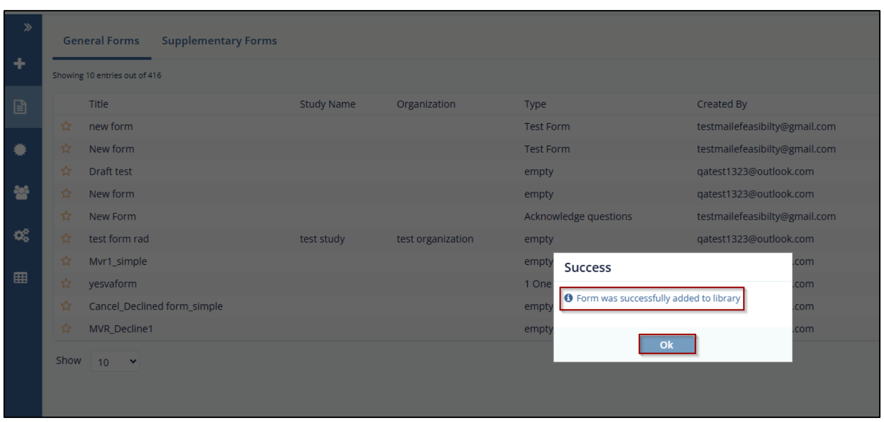
Save to Library

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.

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



Convert to Draft

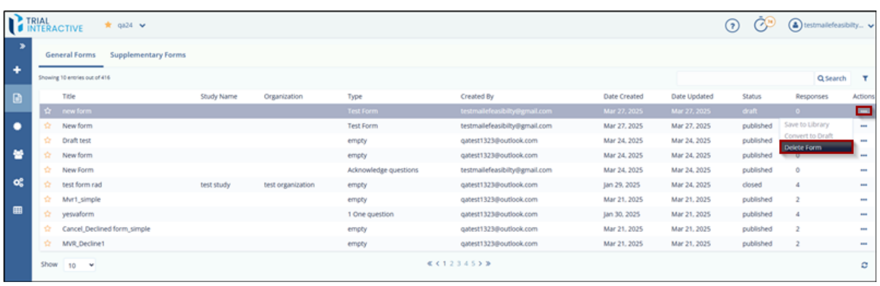
The Convert to Draft option is available only when the form is published but has not yet been sent to any recipients.
Once the form has been published and sent, it can no longer be converted back to draft status.
To convert a published form to draft, follow these steps:

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.

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:

1. 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**.



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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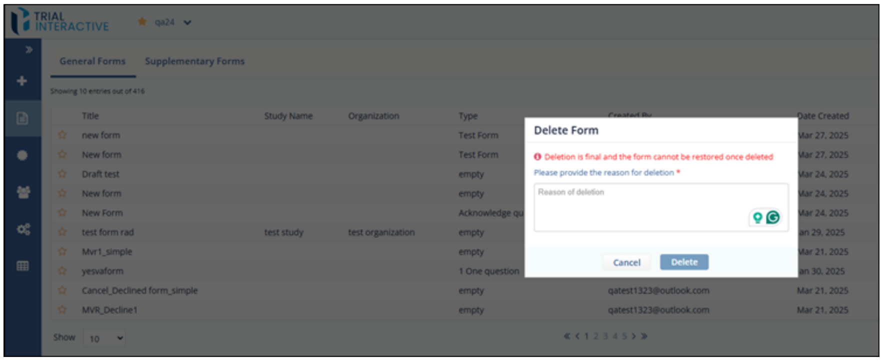

6.1.10 Form Statistics Page

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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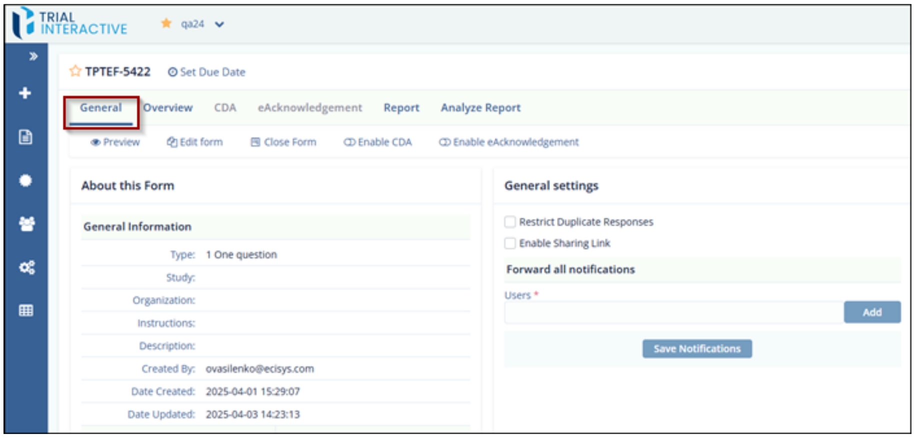
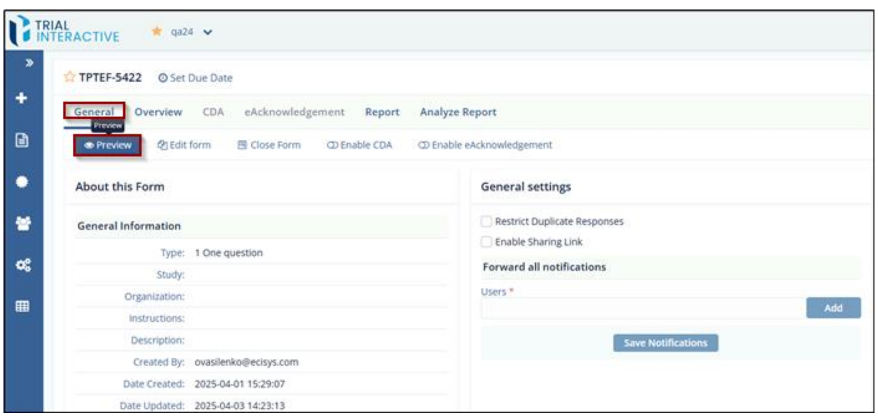


10.1.1 Previewing a Published Form

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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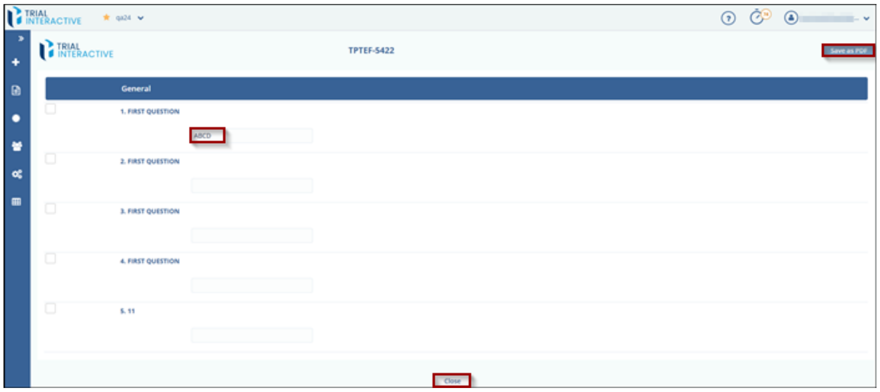
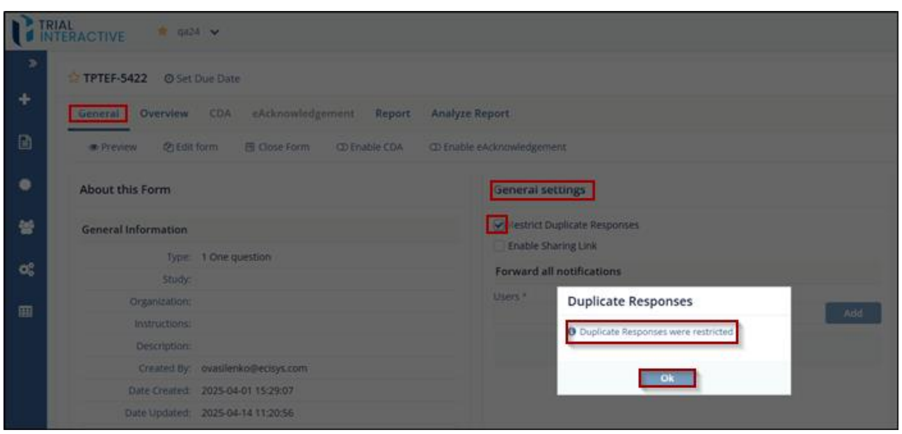


10.1.2 Restricting Duplicate Responses

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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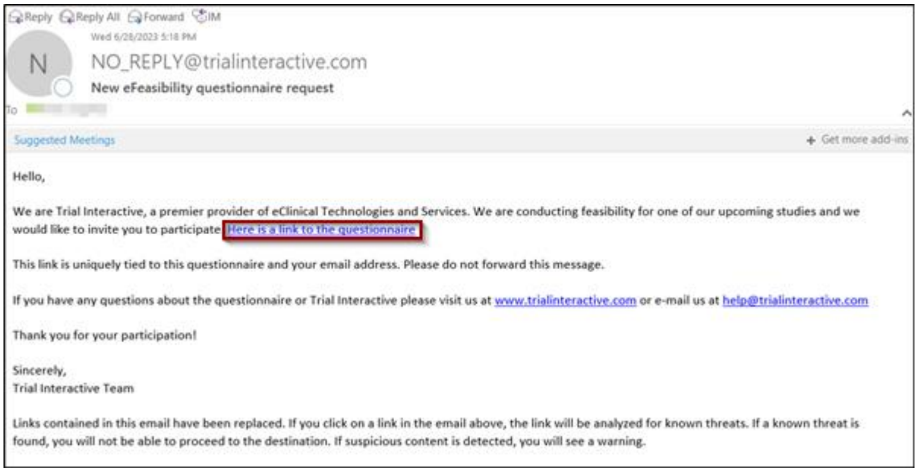
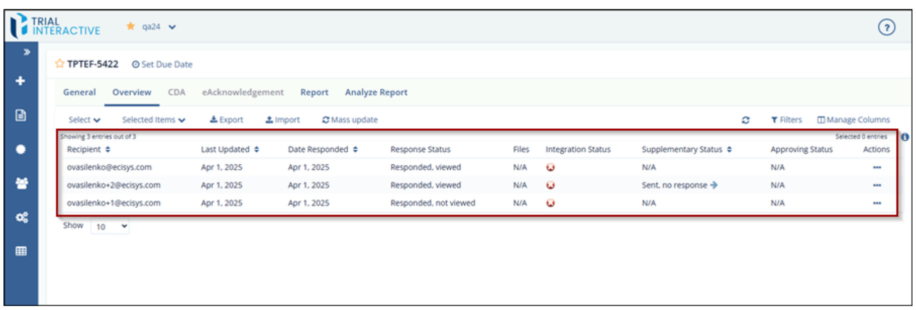
10.1.3 Form/Survey Responses

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.



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



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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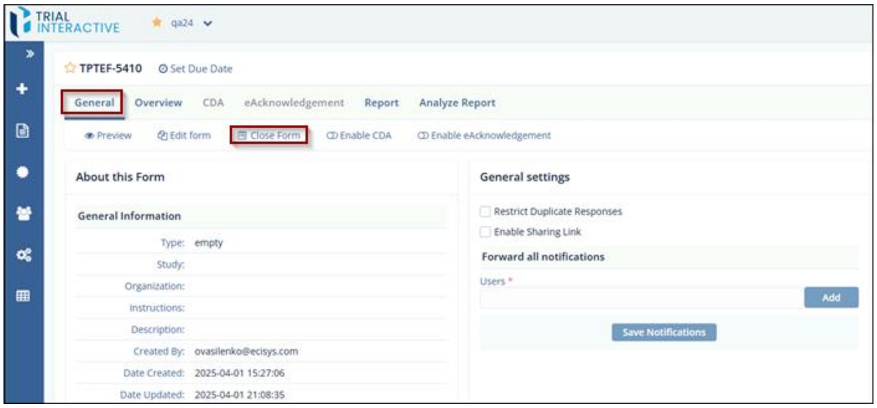
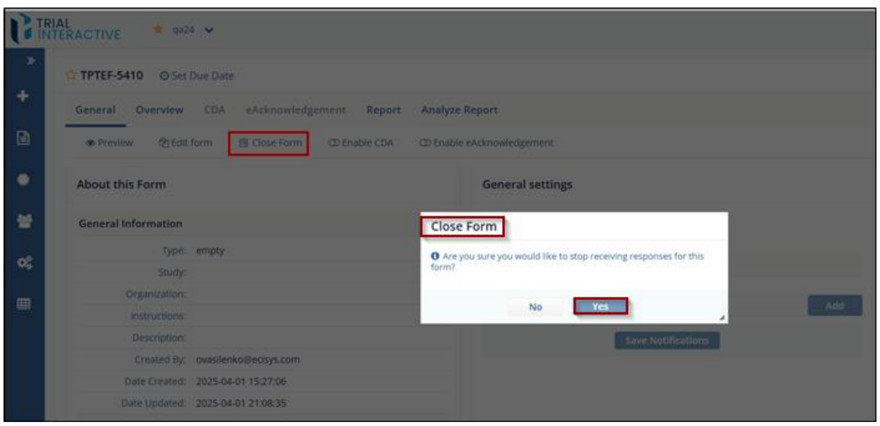


3. In the **Close Form** pop-up window, click **Yes** to confirm or **no** to cancel the action.



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

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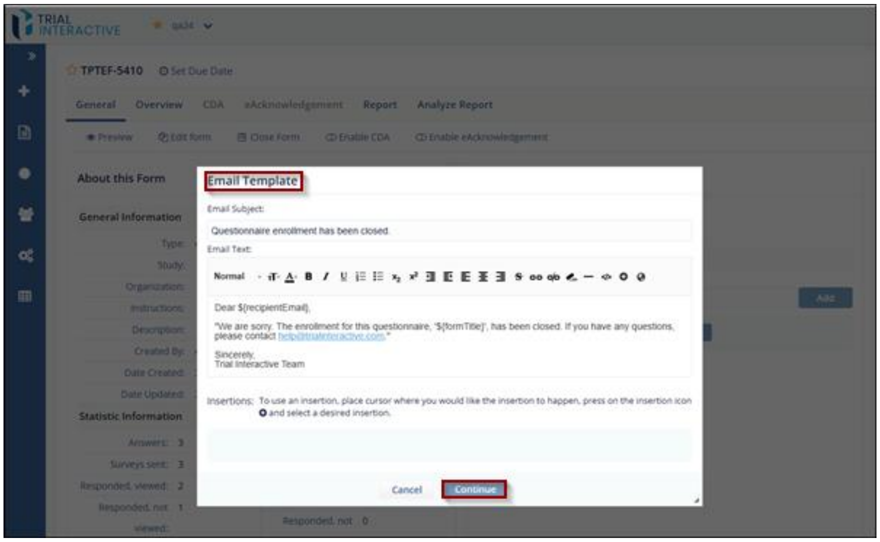

5. The form is now closed.

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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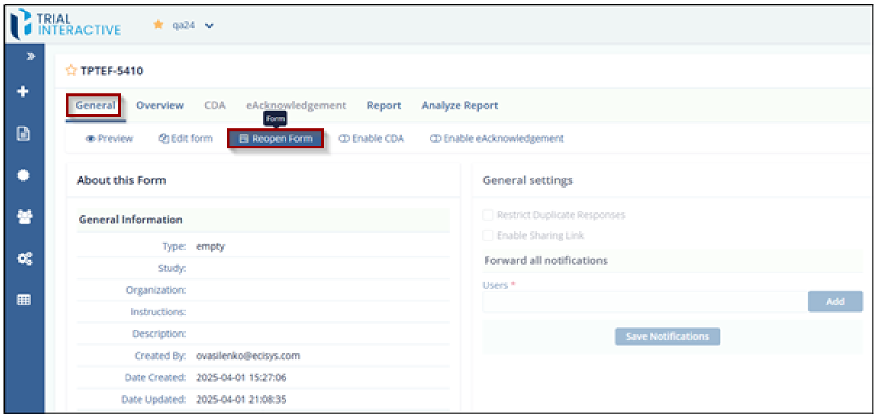
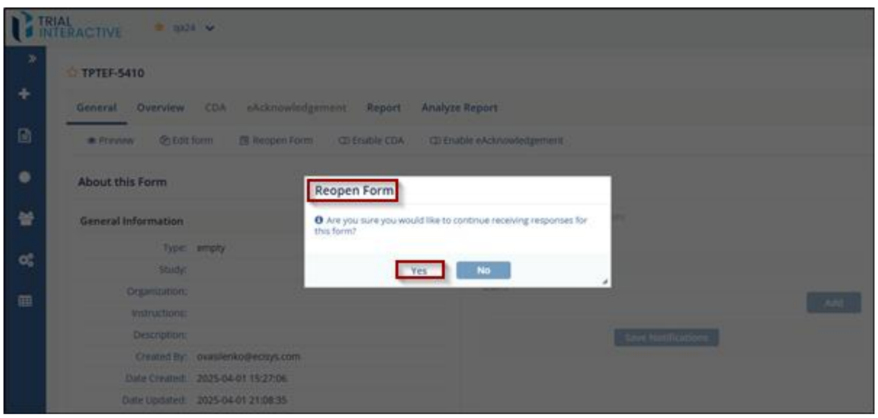


3. The **Reopen Form** pop-up window is displayed.
4. Click **Yes** to confirm and reopen the form.



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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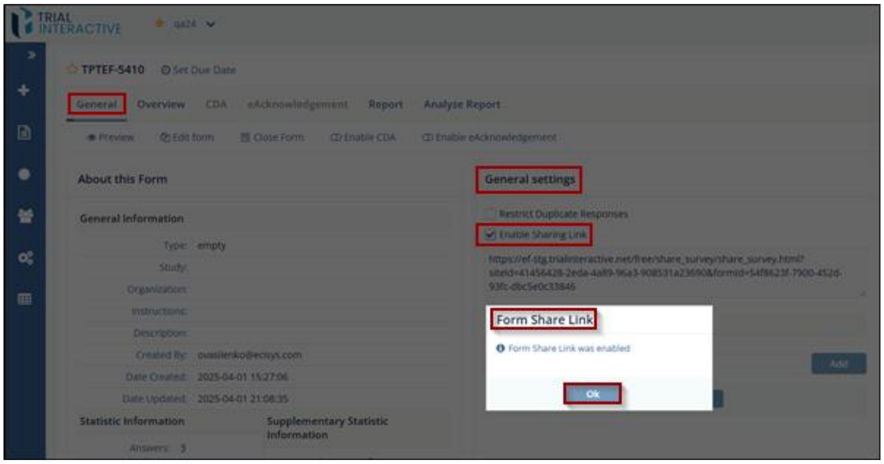

3. A dialog box will appear, displaying a message ‘Form Share Link was enabled’.
4. Click on Ok button, to enable and share the link with other contacts as needed.

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 Confidentiality Disclosure Agreement (CDA).

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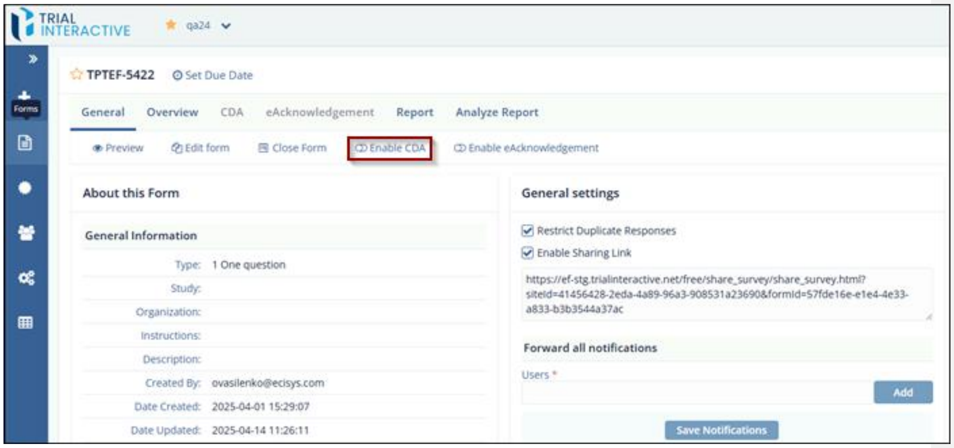
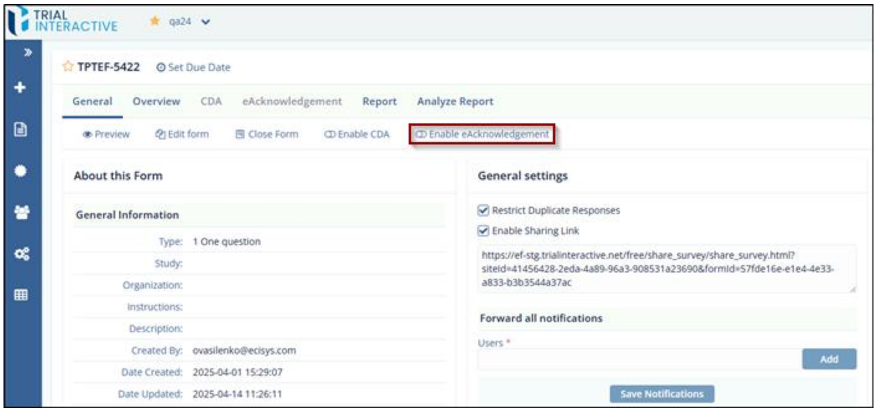


10.1.8 Enable eAcknowledgement

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.



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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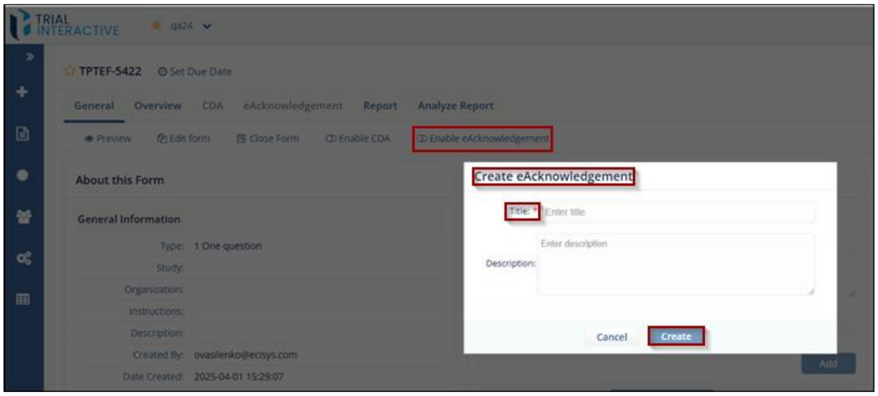
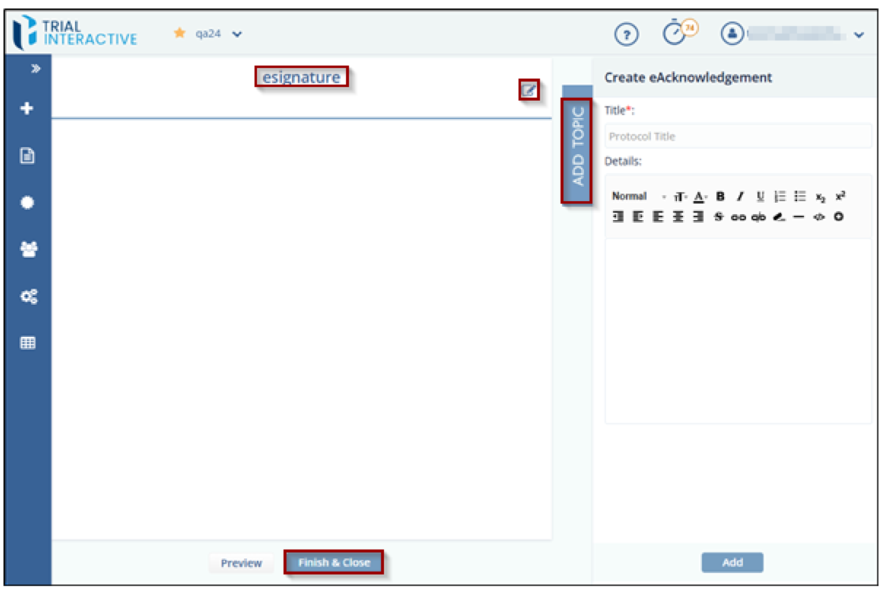


5. Click the **Create** button to save the acknowledgment. The saved eAcknowledgement window will open with a **Preview** option. If the configuration is complete, click the **Finish & Close** button.
6. The eAcknowledgement is now activated for the form, allowing electronic tracking of recipient acknowledgments.



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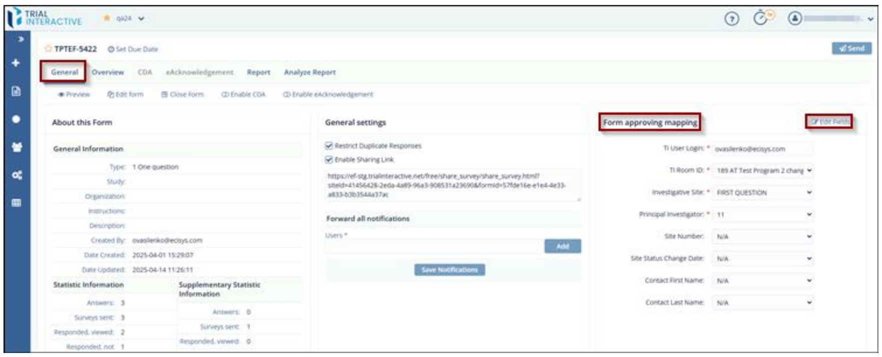
To view and edit the Form Approving Mapping, follow these steps:

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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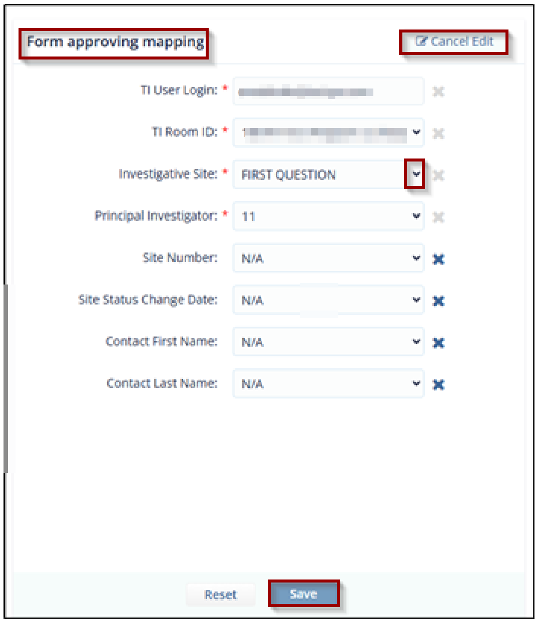
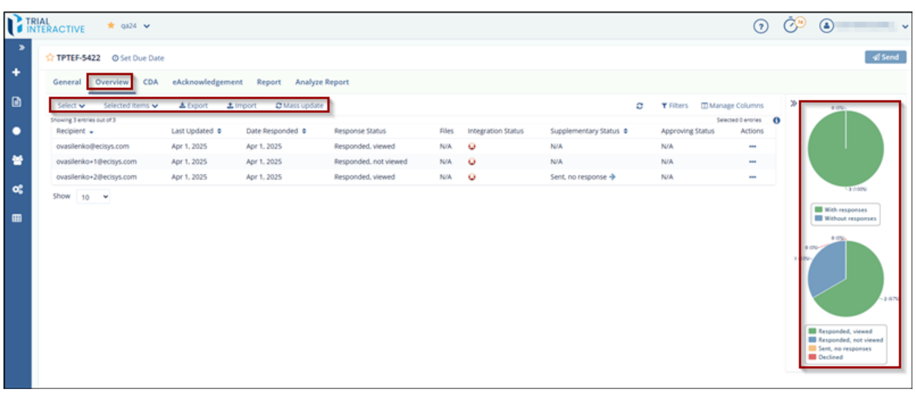


6.1.10.2 Overview

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.



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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.

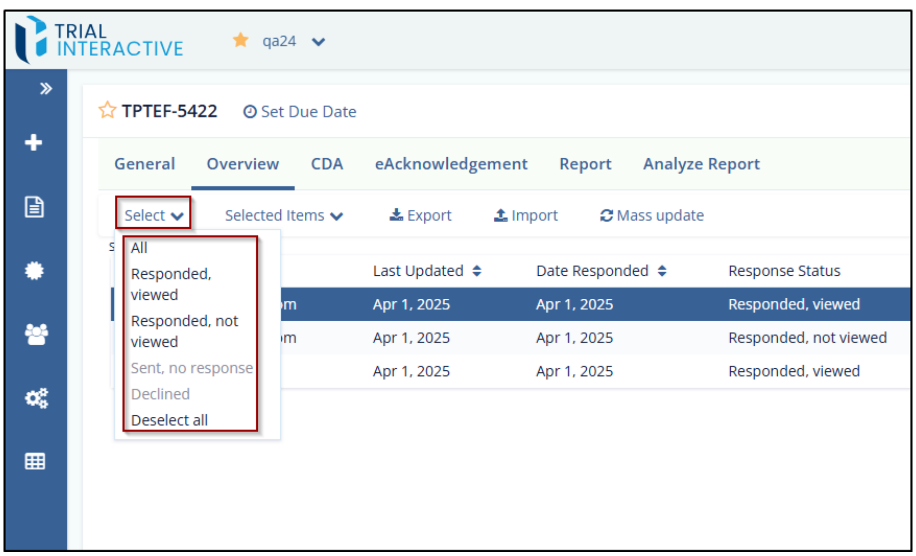
Commented [AT1]: Needs to be updated for https://transperfect.aha.io/features/EF-172

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

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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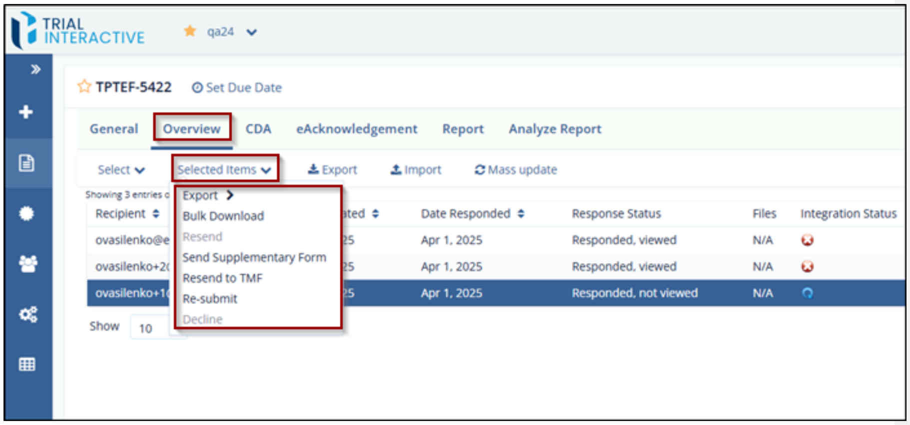
1. Navigate to the **Overview** tab of the form.
2. Click the **Select** dropdown located above the Form Recipients table.
3. Choose one of the options based on the recipient response status:
4. Select **All** to include all recipients.
5. Select a specific status (e.g., Responded, viewed) to filter the list accordingly.
6. Select **Deselect all**. to clear all selections.
7. 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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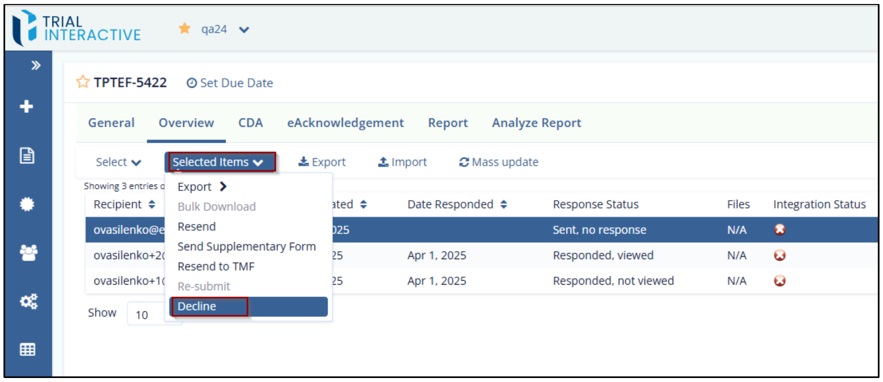
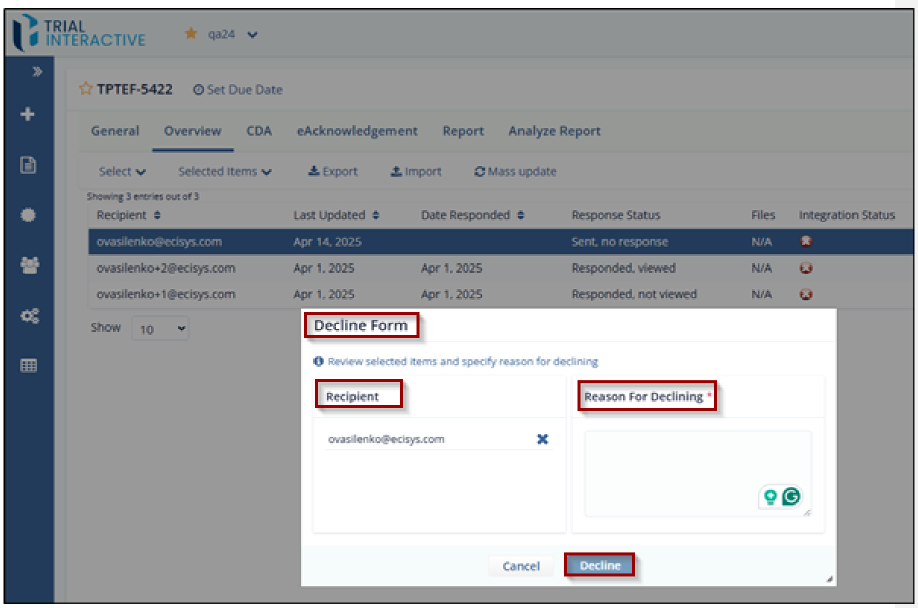


3. Select **Decline**. The **Decline Form** pop-up window will appear with the following sections:
   - **Recipient:** Displays the name or email address of the survey recipient.
   - **Reason for Declining:** A long text field to enter the reason for declining the form.
4. Click the **Decline** button. A **Success** dialog box will open, confirming that the form has been declined.



5. 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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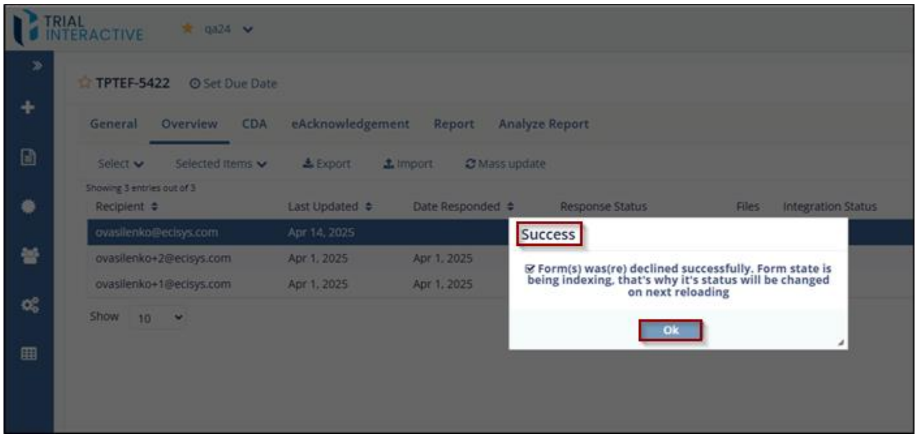


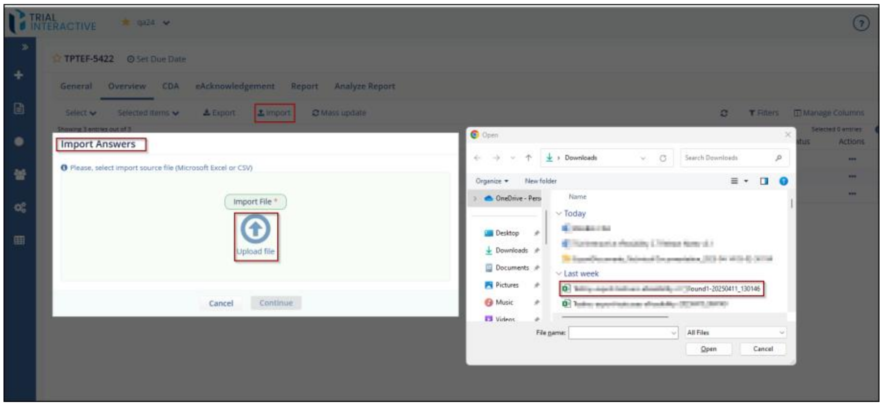
10.2.4 Importing Surveys/Answers

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



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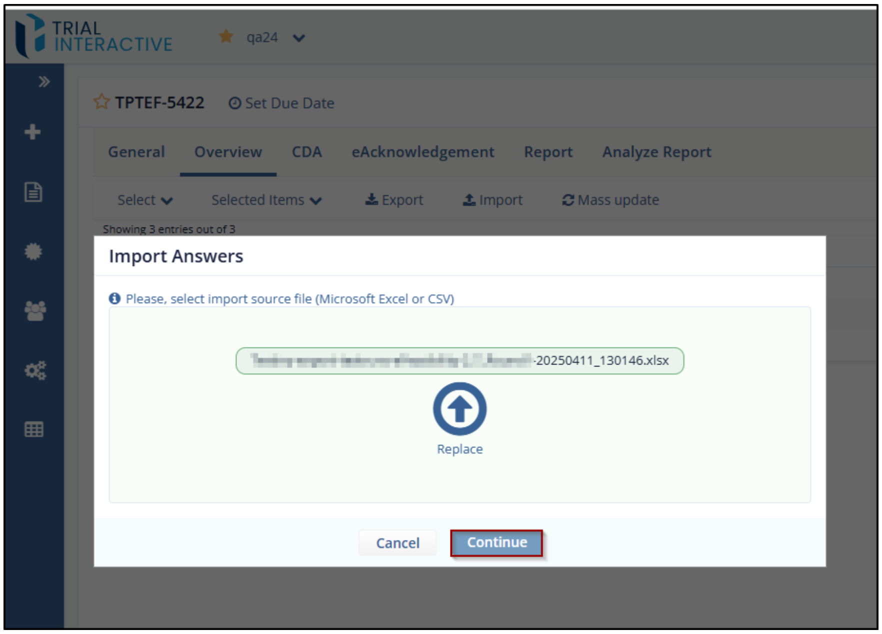
3. Click Upload to upload the source file. Refer to the screenshot below.
4. Click Continue. The Imports Answers popup window is displayed that allows you to map the fields of E-Feasibility with the fields of the source file.



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

10.2.5 Export Form into CSV file

Commented [AT3]: Need to be updated for https://transperfect.aha.io/features/EF-178

Commented [JP4R3]: Updated

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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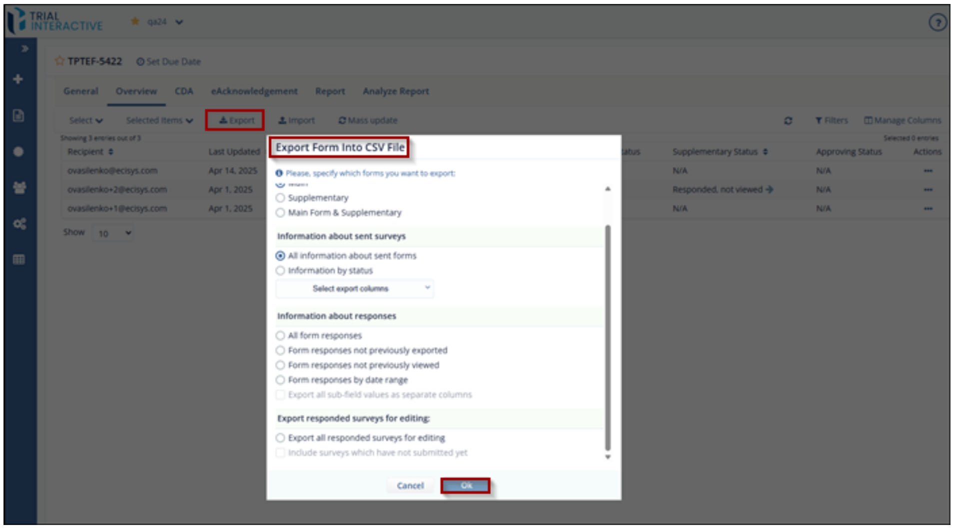

10.2.6 Pie Charts

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

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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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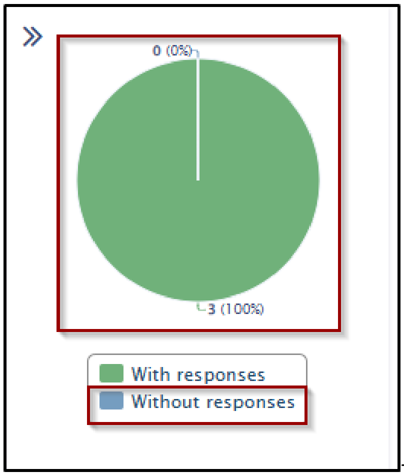

Message Status Pie Graph

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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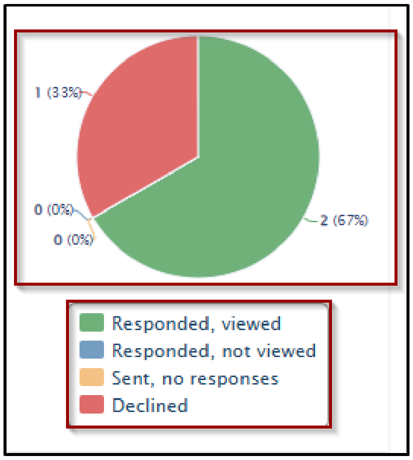

10.2.7 Mass Update

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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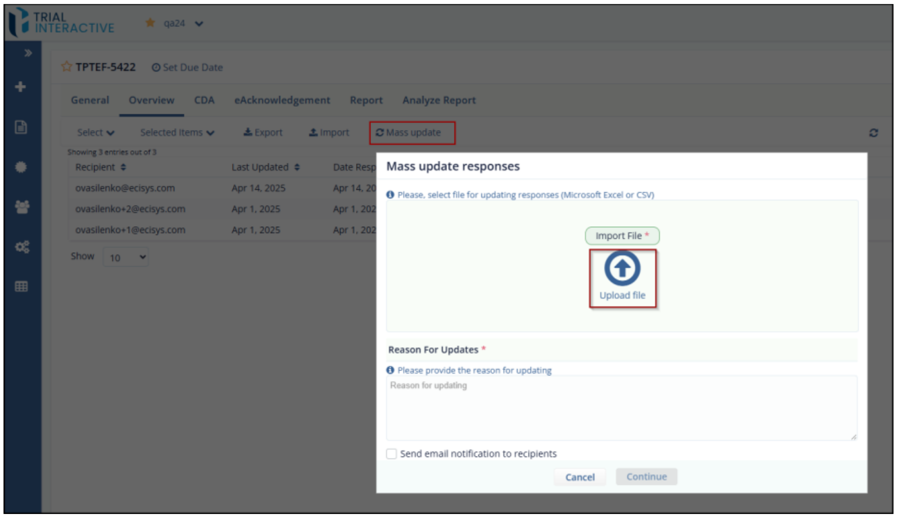
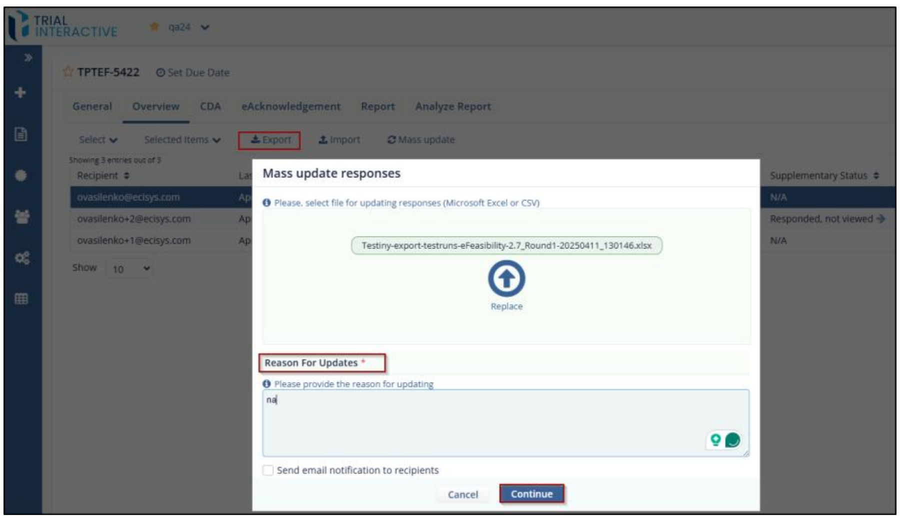


4) After all required fields are completed, the **Continue** button will be enabled.
5) Click **Continue** to execute the mass update.



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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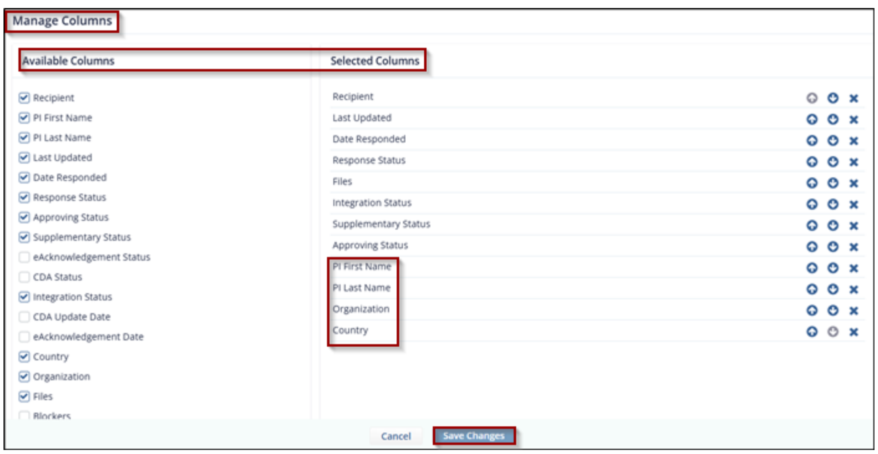
To Manage Column, follow these steps:

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 (↑)** or **Down (↓)** 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.
5. 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.



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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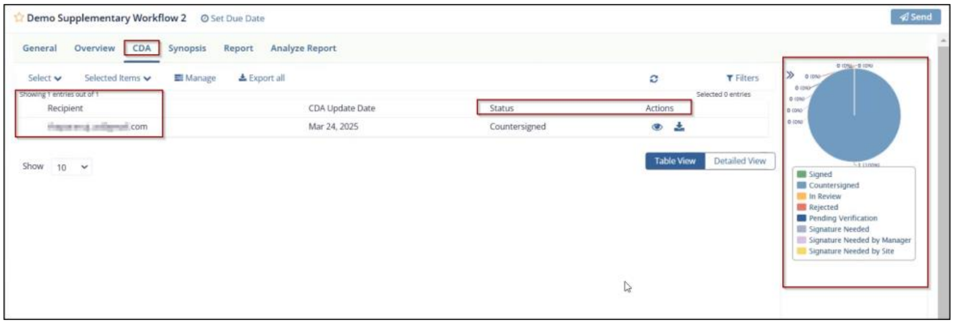
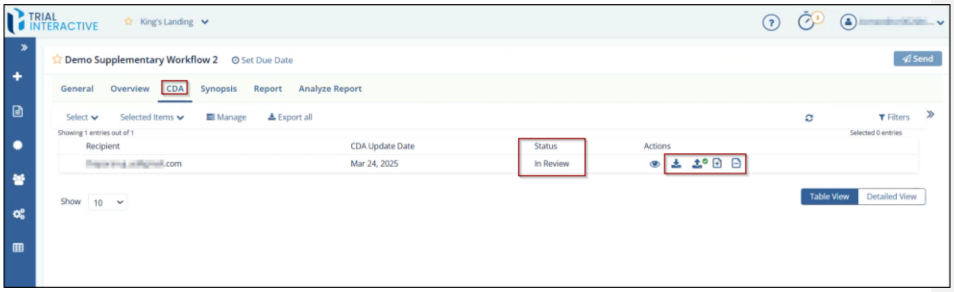


In the system, a Manager can create a CDA by clicking the **CDA button** in the toolbar on the Form Statistics page of a published form. Once created, the CDA is attached to the email sent with the survey.
The Submitter can only complete and submit the survey after the CDA is signed by the Sponsor or 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.



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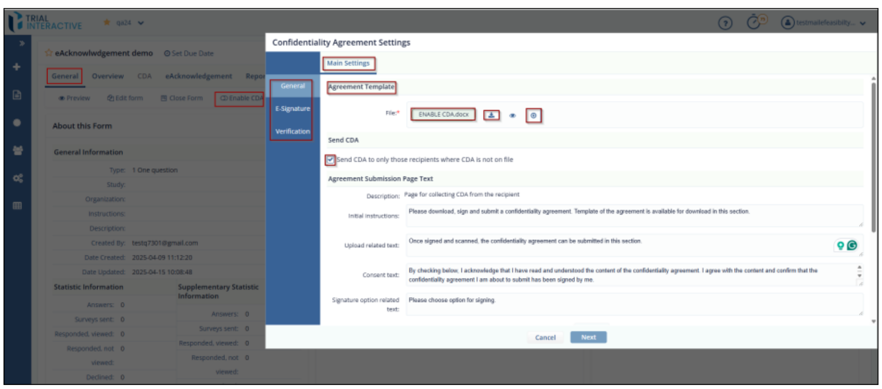
10.3.1 Creating CDA

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.
5. 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.



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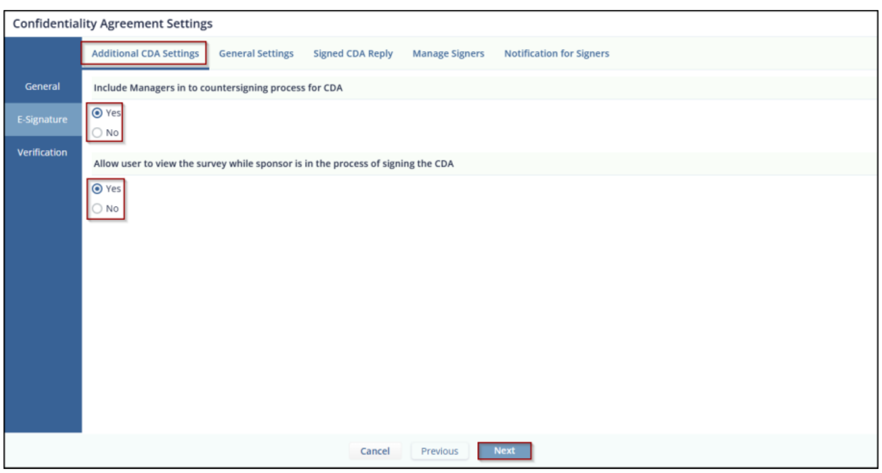
10. Click Next to continue to E-Signature settings, the next screen displays:
    - Top tabs: Main Settings, Additional CDA Settings, General Settings, Verification Email, Signed CDA Reply, Manage Signers, and Notification for Signers.
11. Additional CDA Settings, allows user to Include Managers in to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



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

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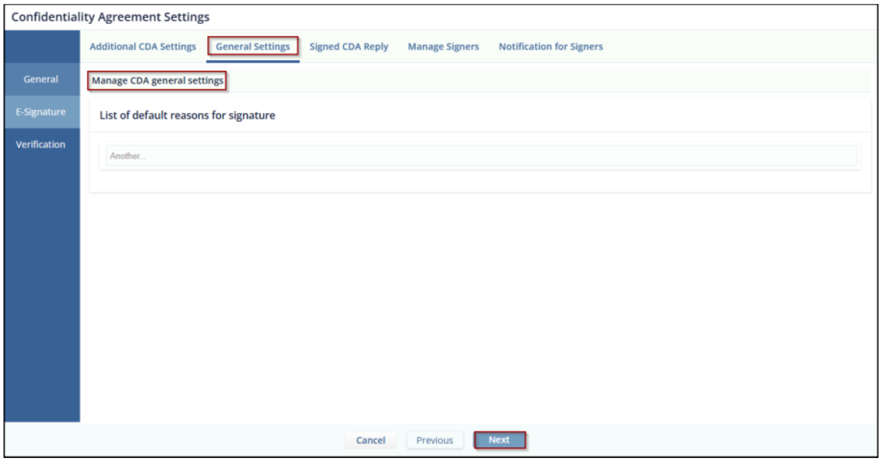
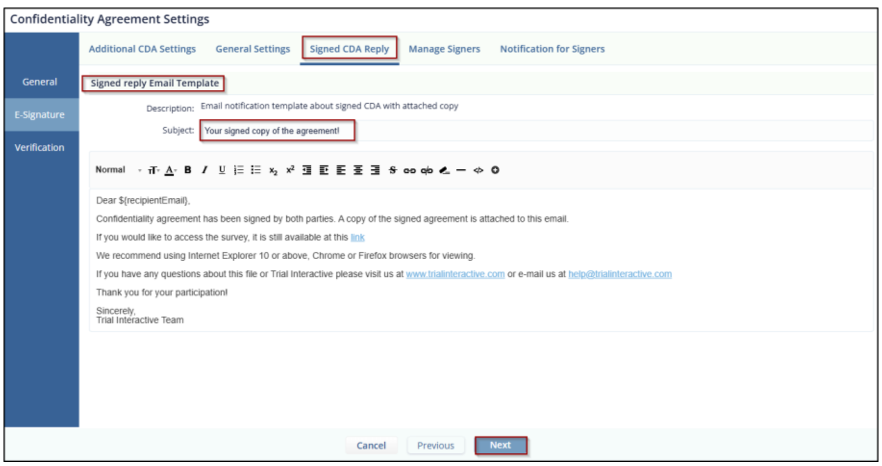


13. Click on **Next** button, display the Signed CDA Reply screen, allows user to send signed reply email.



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

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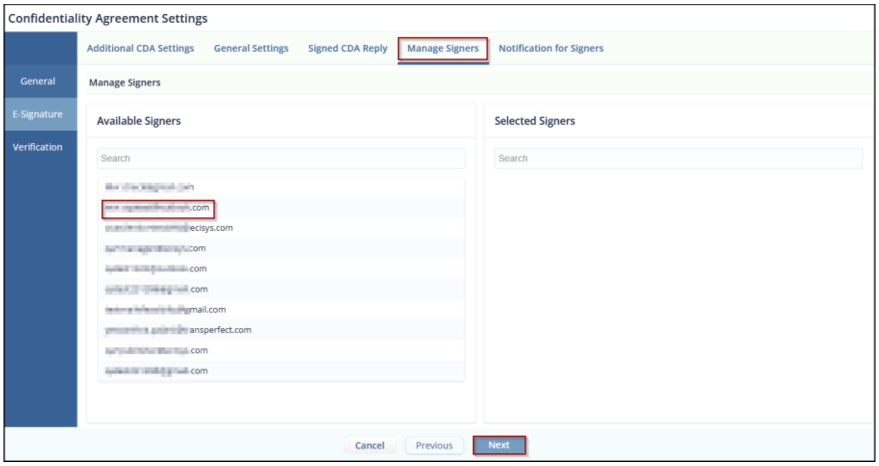
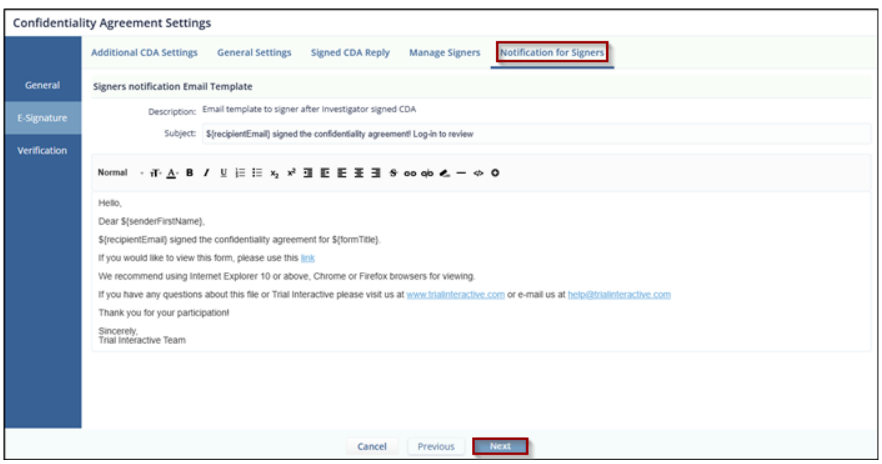


15. Click Next to proceed **and it display Notification for signer's screen**.



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

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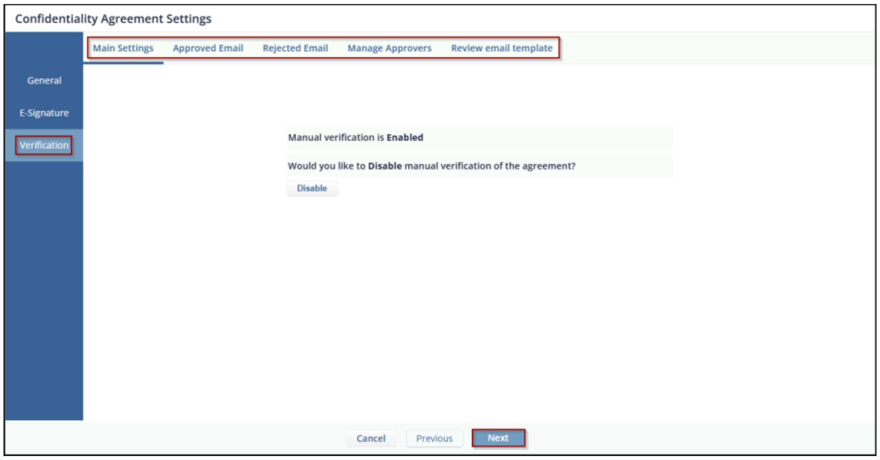


17. Click on Finish, once all setting is done.

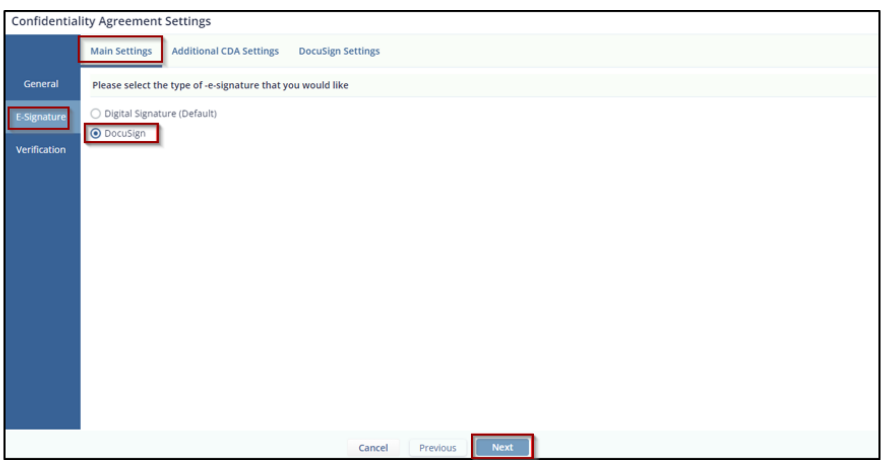
10.3.2 Enabling DocuSign

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

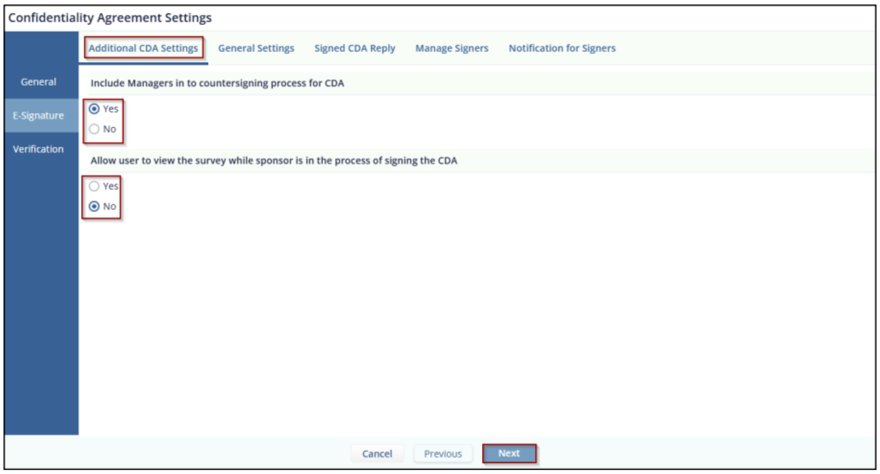
DocuSign is an application that is used for signing the CDAs.

To enable DocuSign, follow these steps:

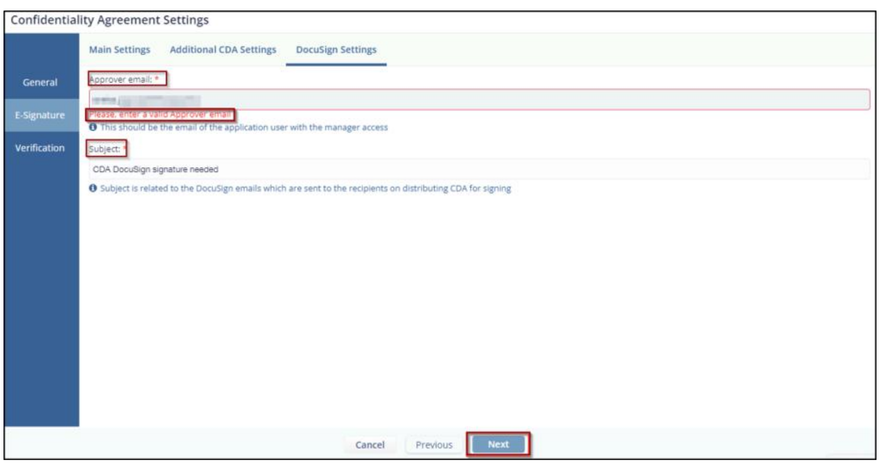
1. From the **Main Settings** page under the **E-Signature** tab, select the DocuSign radio button to navigate to the DocuSign Settings page.
2. When the **DocuSign** option is selected, all pages previously visible under **Digital Signature** in the E-Signature tab are replaced with DocuSign-specific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



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.



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**.



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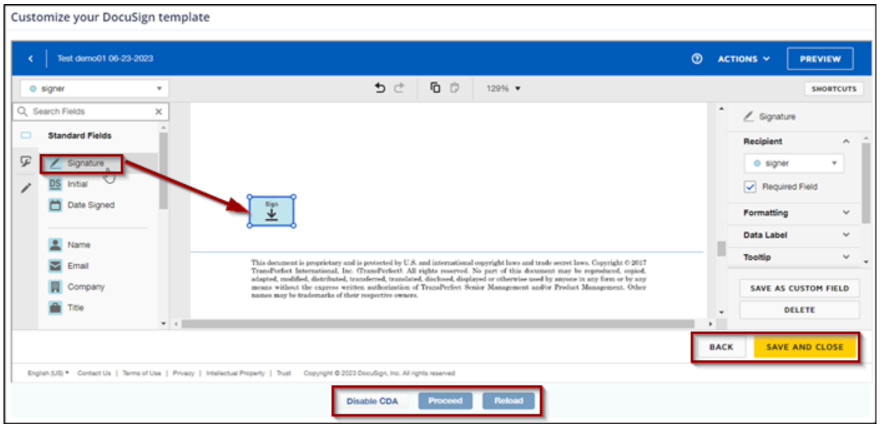
5. Click **Next** to navigate to the Manual Verification page.
6. Click **Finish**. You will be redirected to the Customize Your DocuSign Template page.
7. Drag and drop the **Signature** field from the **Standard Fields** section into the document's text area, then click **Proceed**.



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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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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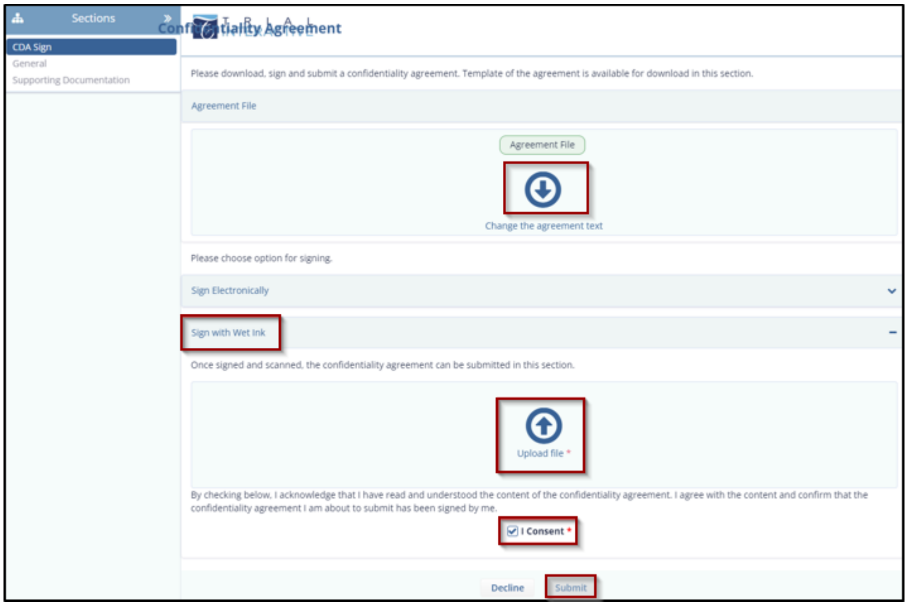
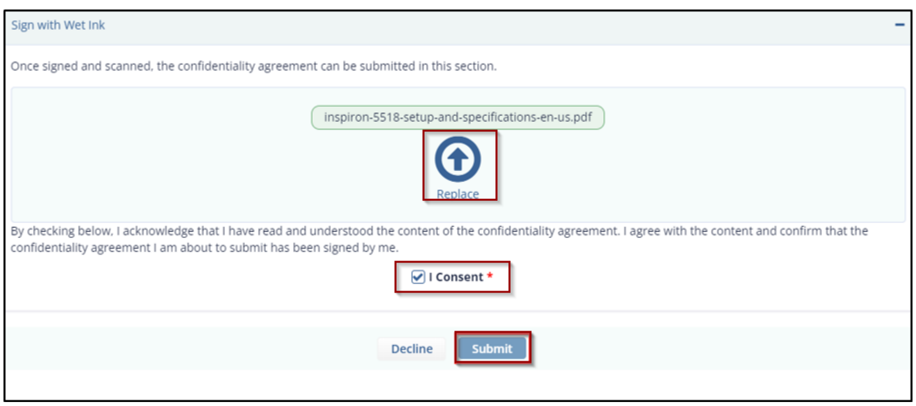


When submitter signs the CDA using Wet Ink and submit it, a notification is sent to an **approver** specified in Manual Verification who can further accept or reject it. Below is an example of signing CDA at the approver end.



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

To enable Manual Verification:

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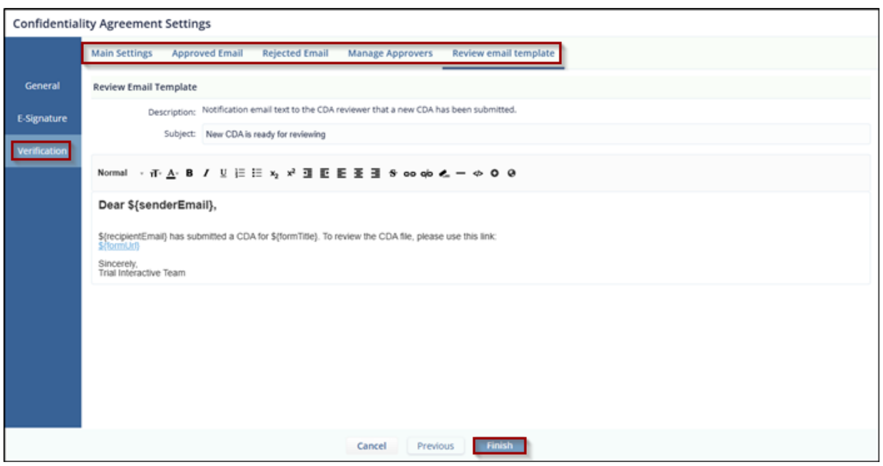
1. From the **Manual Verification Page**, click the Enable button.

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.

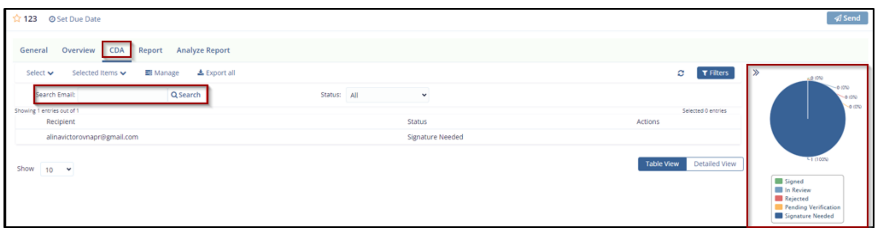


10.3.5 Viewing CDA

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.



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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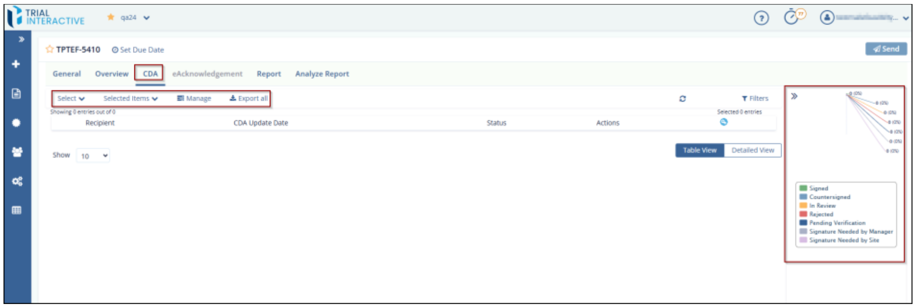
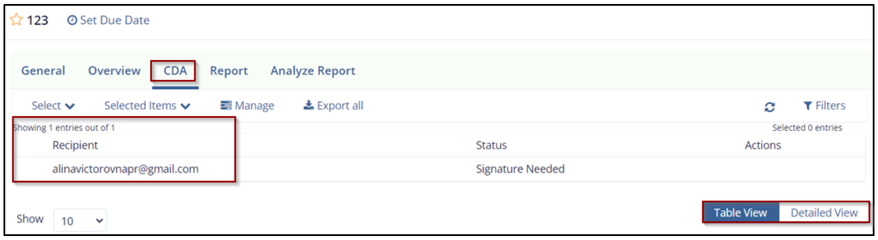


Preview and Sign CDA

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:

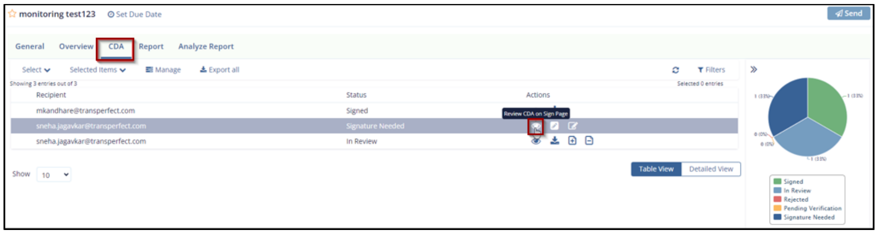
1. Signed: When the status is signed, the Actions column displays two buttons: Preview and Export. The manager can preview and export CDA.
2. Signature Needed: When status is Signature Needed, the Actions column displays two buttons: Preview and edit. The manager can preview and sign CDA.
3. Rejected: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



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.



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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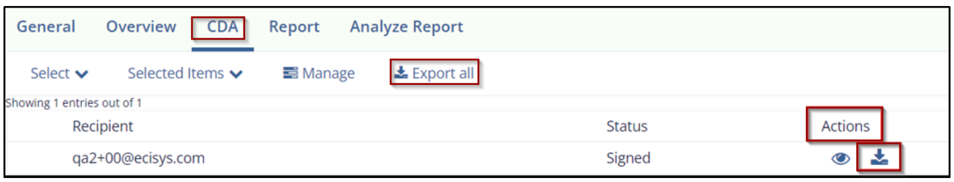
Export CDA

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



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.

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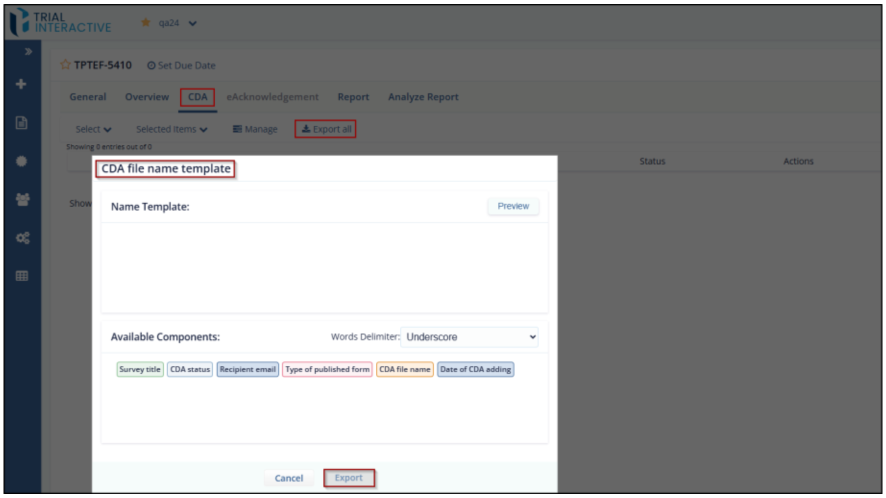
c. The Cancel and Export button. Export button is deactivated by default and activated only when you add components from the Available Components section to the Name Template section.



4. Drag-and-drop the components from the Available Components section to the Name Template section which you want to display for CDA file name template. Refer to the screenshot below.
5. Click the Preview icon from the Name template section to view the CDA file name template as per added components. Below is an example of CDA file name template preview.
6. Notice that the Preview icon changes its name from Preview to Edit Template and the CDA file name template is displayed as per the components added.

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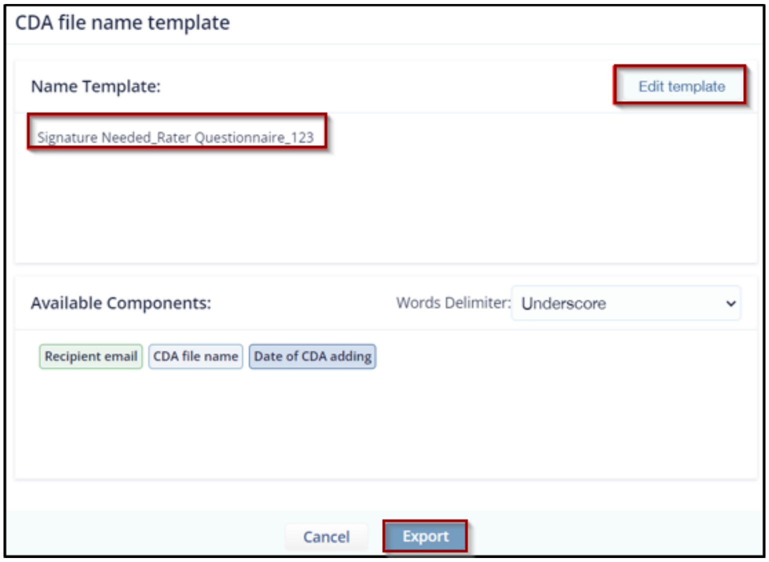
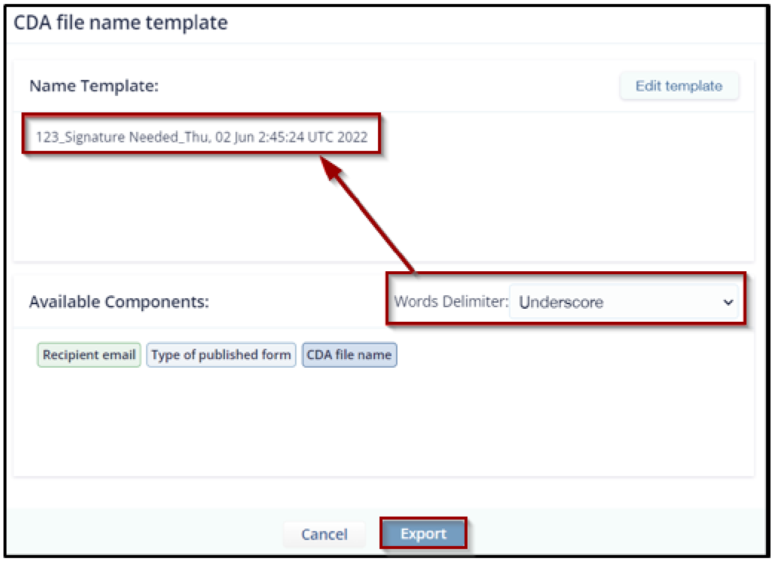


7. Click the Words Delimiter dropdown from the Available Components to change the delimiter between words as per your choice. The dropdown displays options as shown below:



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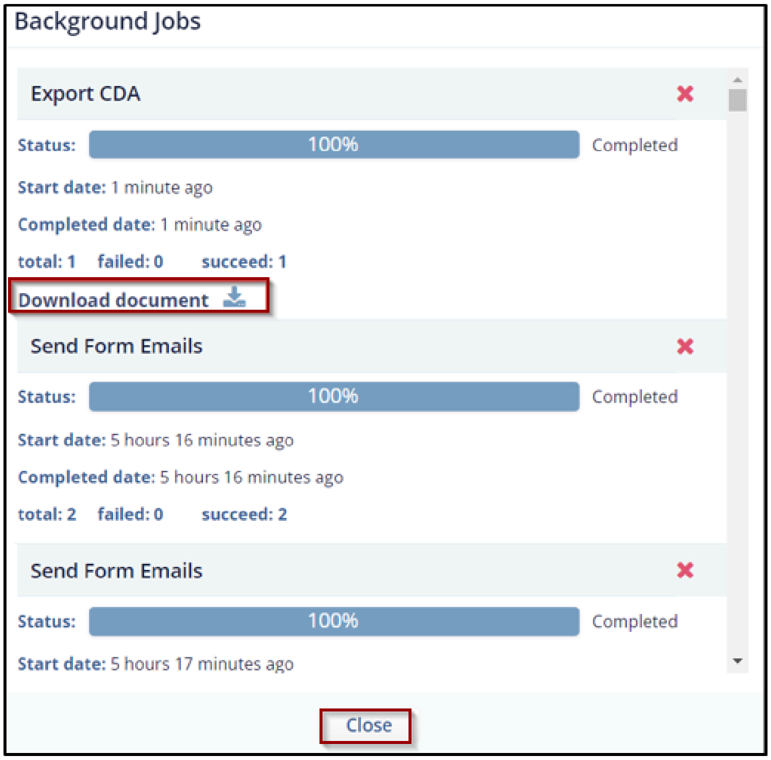
8. Below is an example showing difference between delimiters- Underscore, Whitespace and Dash from the list.
9. Once all settings are done, click Export to export CDA of all recipients. The exports start in the Background which displays the details about the export.



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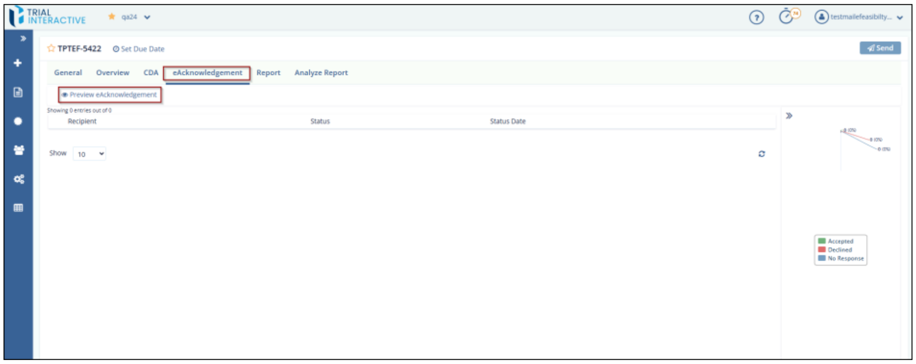
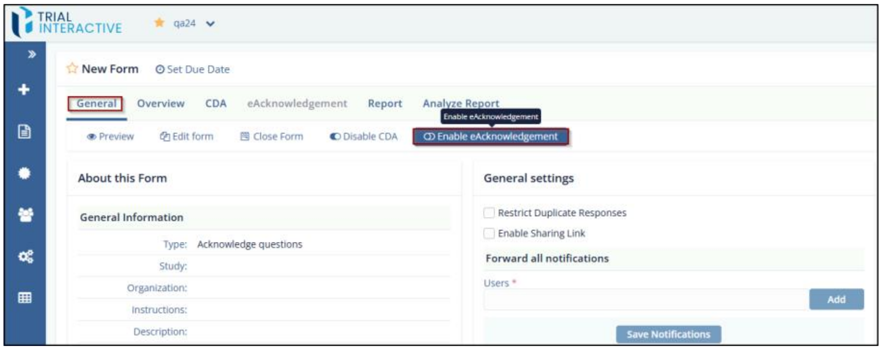
The Enable eAcknowledgement is active once the form is sent, the sponsor will receive an email from the company containing a link to the **eAcknowledgement** section. The sponsor must click the link and review the provided information. To complete the process, the sponsor must electronically acknowledge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



To Create eAcknowledgement, follow these steps:

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



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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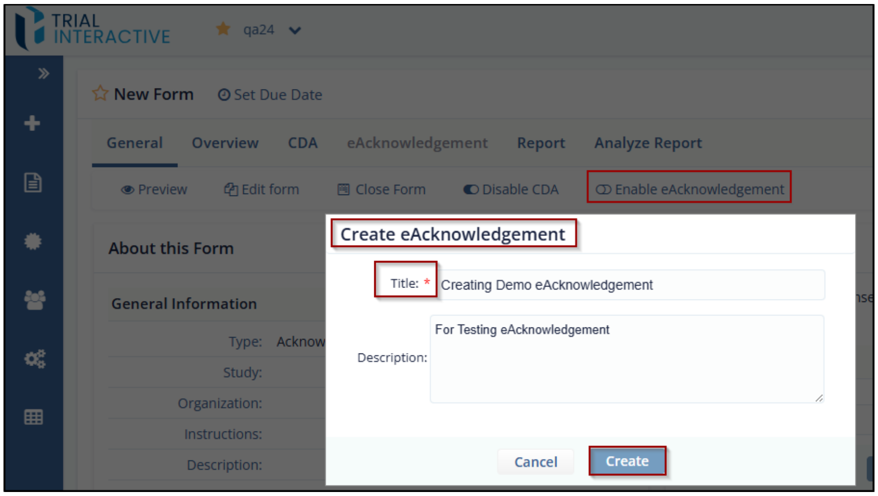
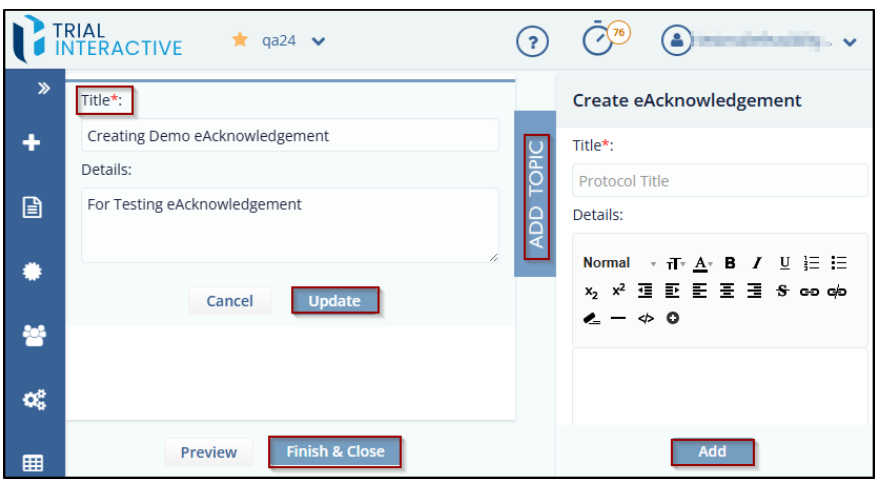


5. Click the **Create** button to save the acknowledgment. The saved eAcknowledgement window will open with a **Preview** option where the user can edit and add Topic from the top right corner. If the configuration is complete, click the **Finish & Close** button.



6. The eAcknowledgement is now activated for the form, allowing electronic tracking of recipient acknowledgments.
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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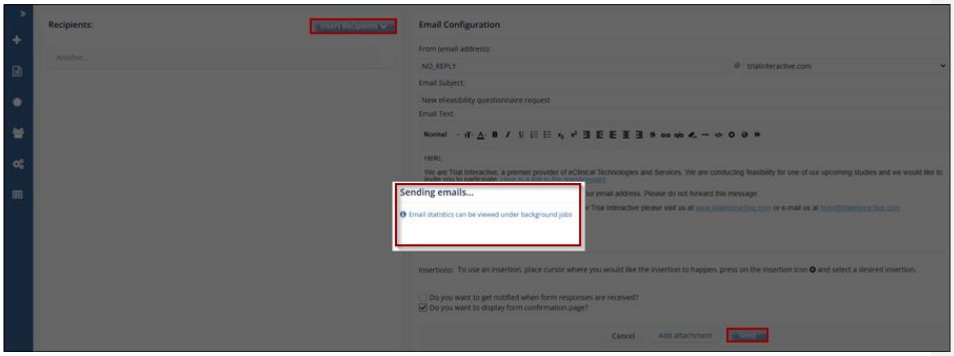
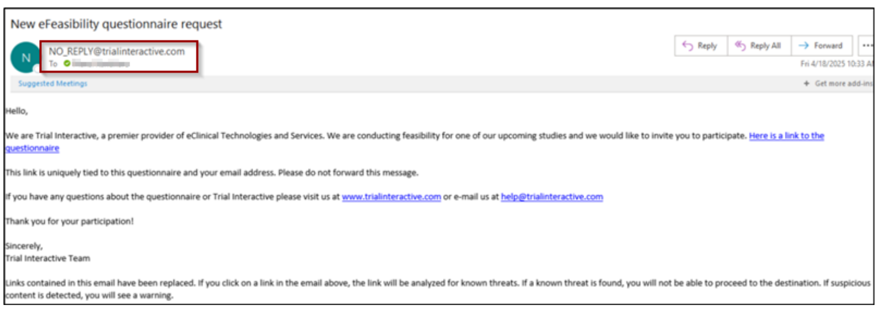


8. The recipient will receive an email from **NO_REPLY@trialinteractive.com**. Click the link provided in the email.



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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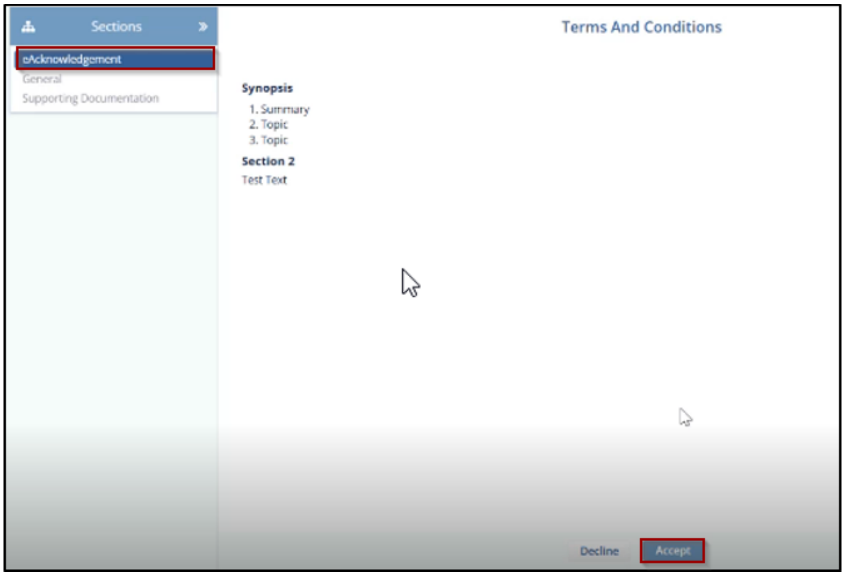
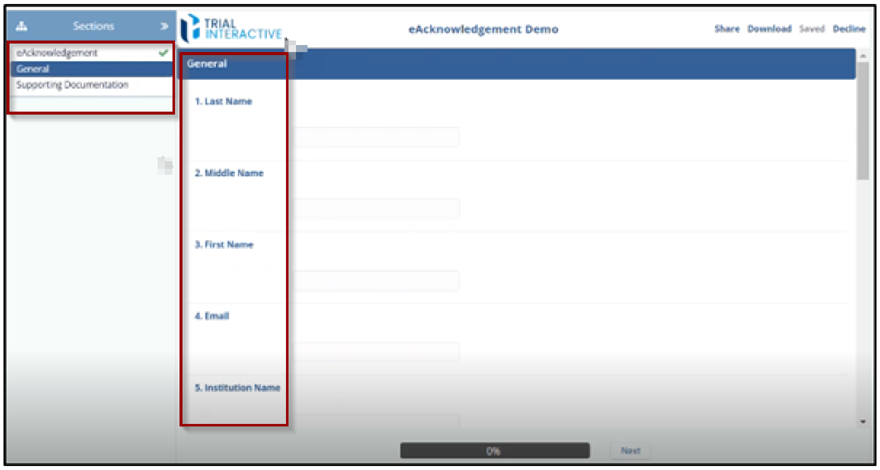


10. Once the eAcknowledgement is accepted, a new window will open displaying the **form fields** for the recipient to complete



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

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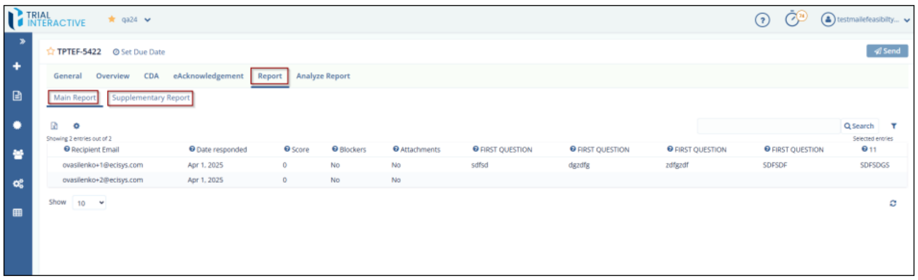
6.1.10.5 Report

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:

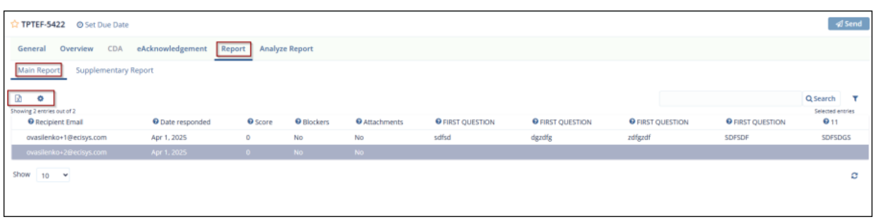
- **Main Report**
- **Supplementary Report**



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.



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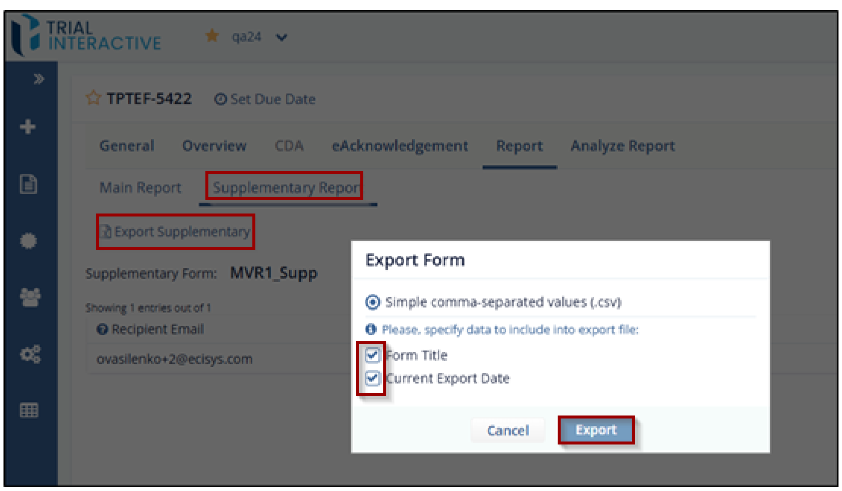
The system also includes **built-in analytical capabilities** to support statistical analysis of quantifiable question types. **Open-ended questions**, such as those requiring comments or free-text responses, are excluded from these statistical evaluations.

- **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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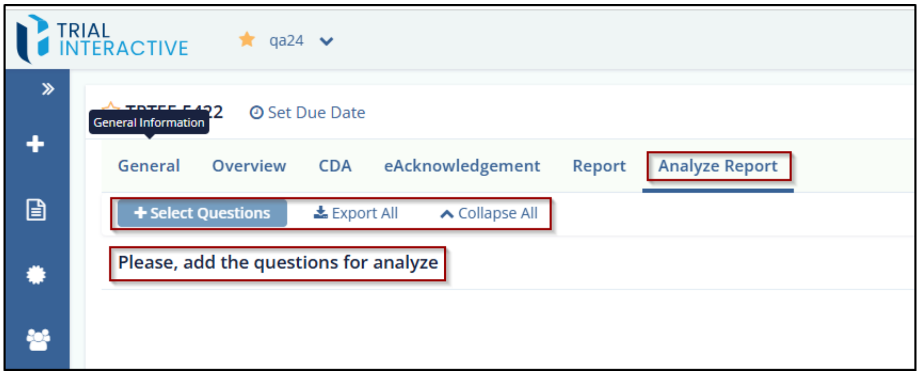
6.1.10.6 Analyze Report

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.



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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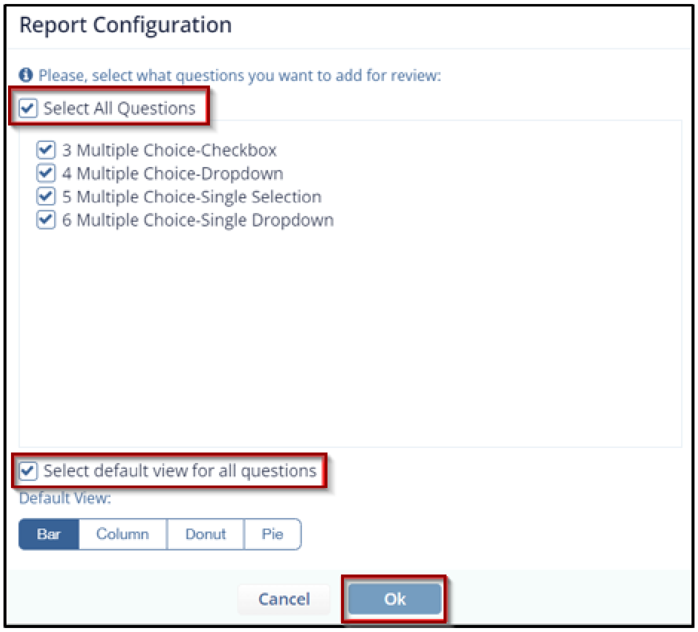
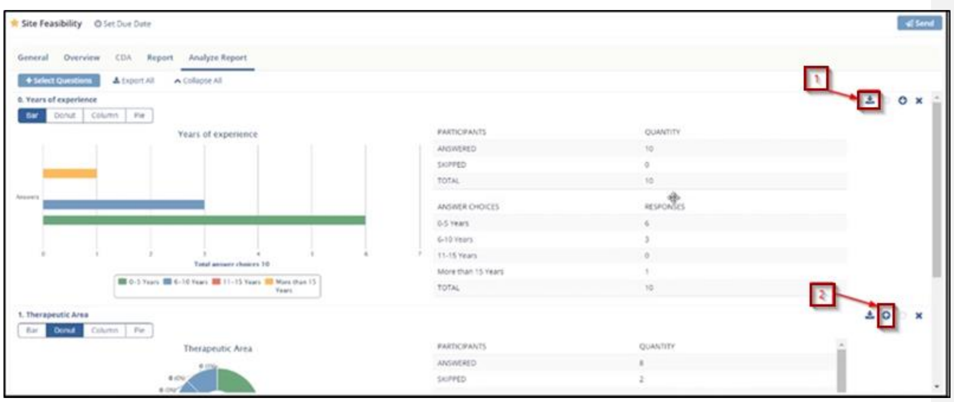


3. Click **OK** to save your selection and close the window.
4. The report will now be configured based on your selected questions.
5. You can download the report or change the sequence order of the questions:
   - Select **Option 1** in the image to download the report.
   - Select **Option 2** to change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



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

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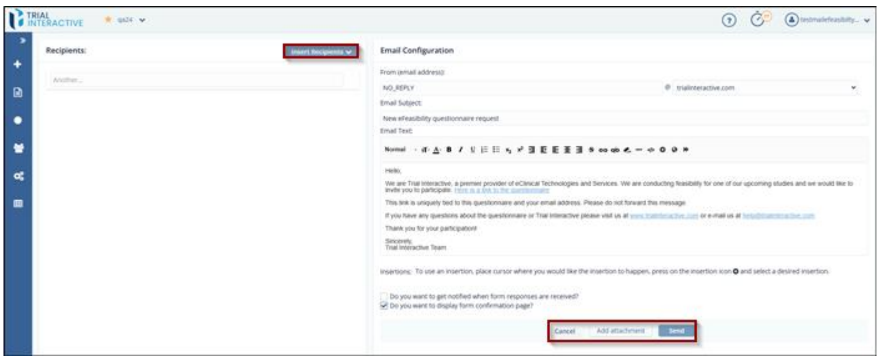
6.1.10.7 Send Survey

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



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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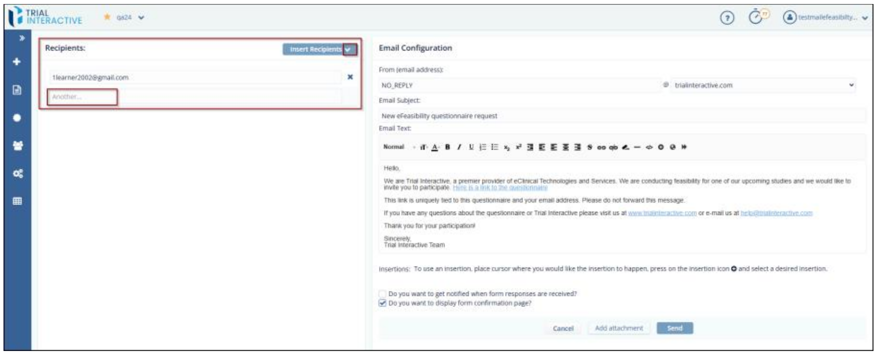
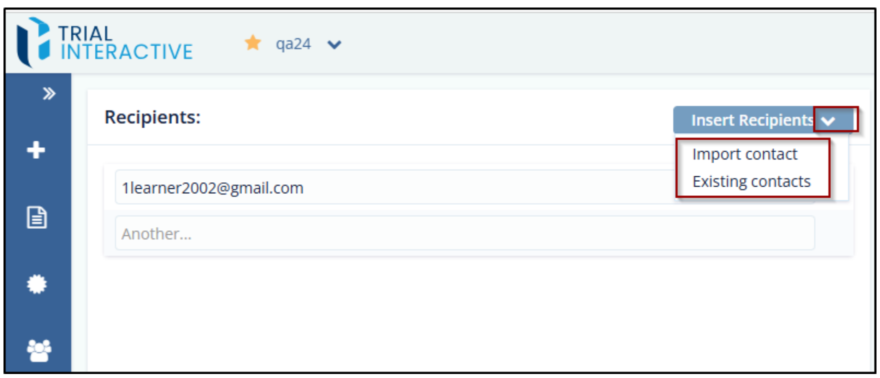


To Import contacts, follow these steps:

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.



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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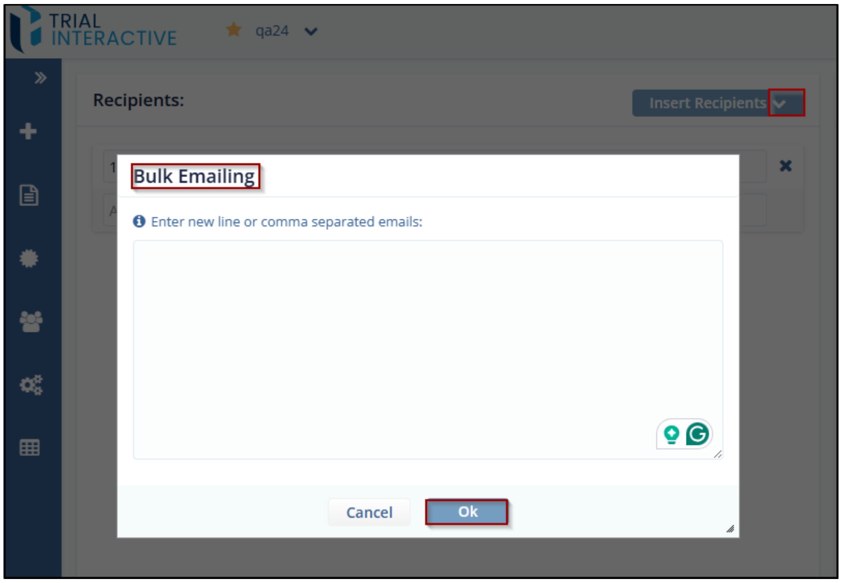
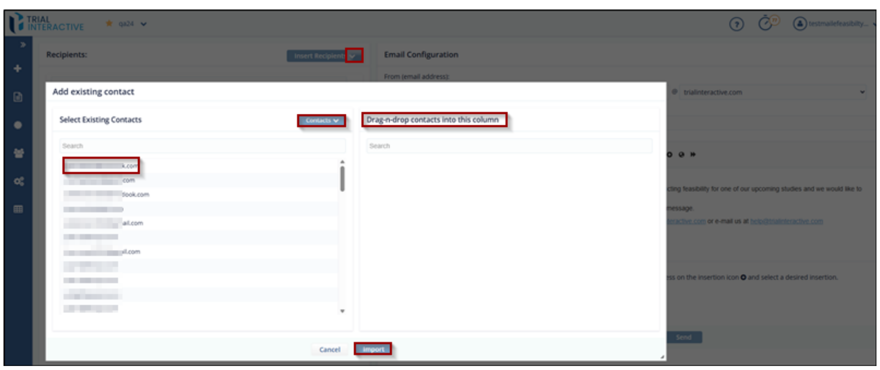


To add Existing Contacts, follow these steps:

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.



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.

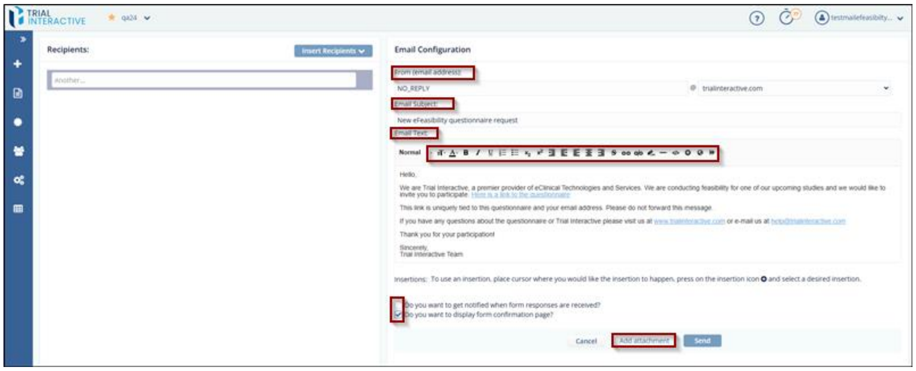
Email Subject
This section allows you to type the Email Subject. The default subject for the Email is defined in **Email Templates.**

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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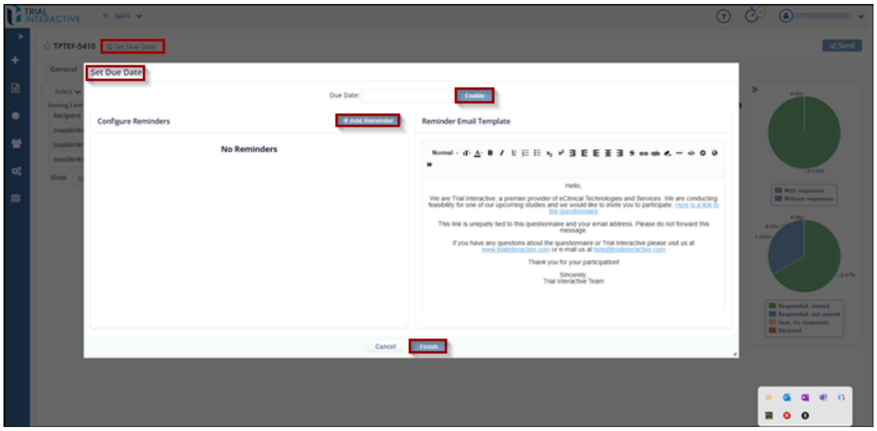
1. Click the **Set Due Date** from the Form Statistics Page. The **Set Due Date** popup window is displayed.
2. The Set Due Date dialog contains the following panels:
    - The Due Date textbox along with the **Enable** button next to it.
    - **Configure Reminders**: Allows you to set the reminder due dates.
    - **Reminder Templates**: This template is built-in and defined in **Email Templates**.
    - The Cancel, **Add Reminder** and **Finish** buttons.



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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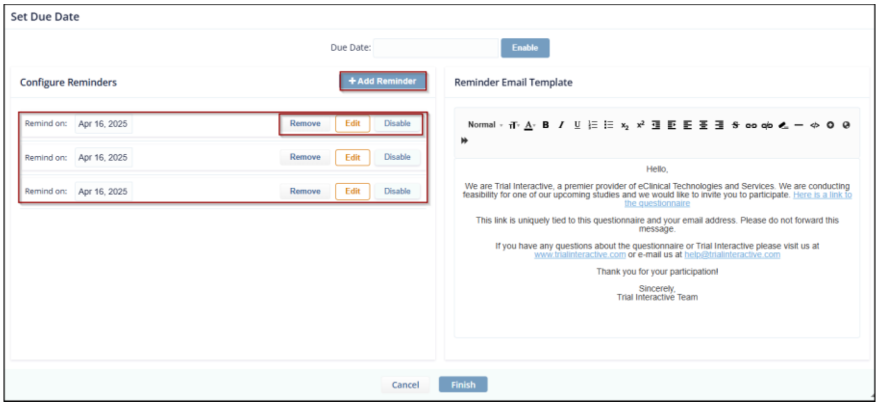
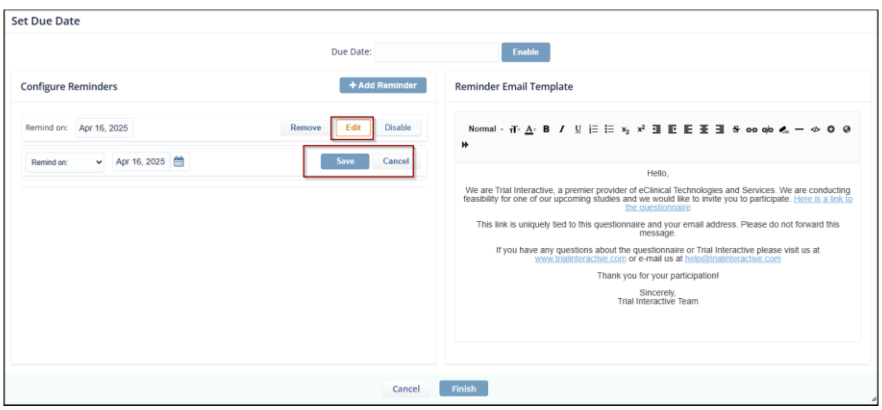


6. The **Edit** button **disappears** and the **Remind On dropdown** enables which has following options:
    - **Remind On:** To set reminder on selected date.
    - **Remind before:** To set reminder prior to the Due Date.
7. Select the required option from the dropdown and set the reminder. Notice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



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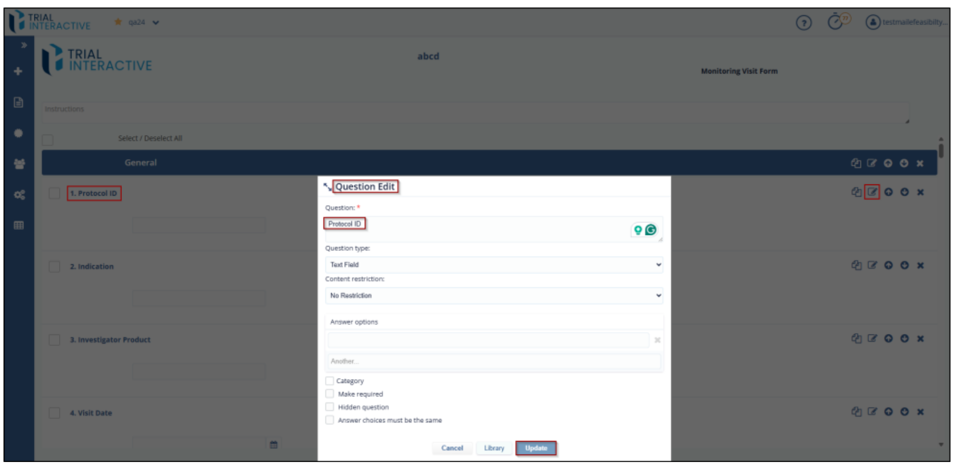
To change Question Titles of a form, follow these steps:

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

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



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

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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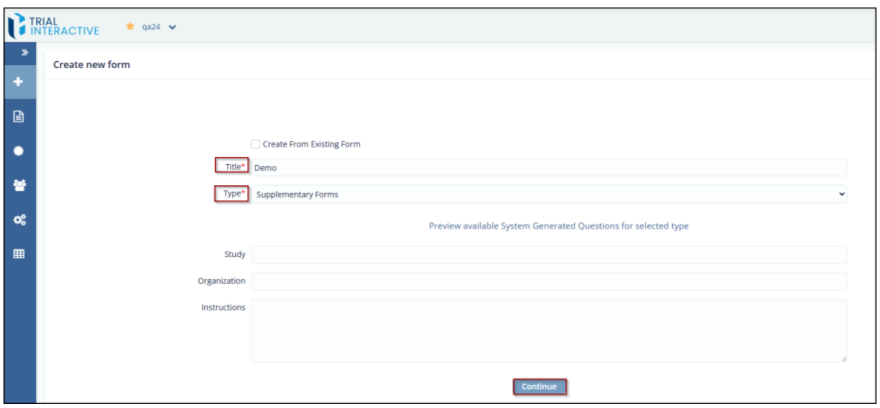
- **Create**
- **Approve**
- **Reject**
- **Submit**

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 (*).



3. Click the Preview available System Generated Questions for selected type button displayed below the Type field. You can edit the form by clicking the **Edit** icon displayed at the right corner for each field.
4. (Optional) enter the details for the fields – **Study**, **Organization**, **Instructions**.
5. Click **Continue**.
6. The form opens in the grid with all the details filled.
7. Click the **Publish** button displayed at the bottom of the screen. You can add a question and a section to the supplementary form by clicking the buttons – Add Question and Add section displayed vertically in the right corner.
8. Select the **Supplementary Form** radio button in the Publish Form.

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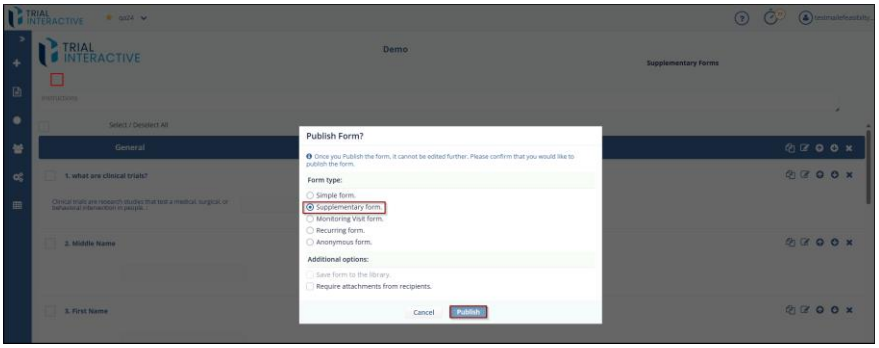
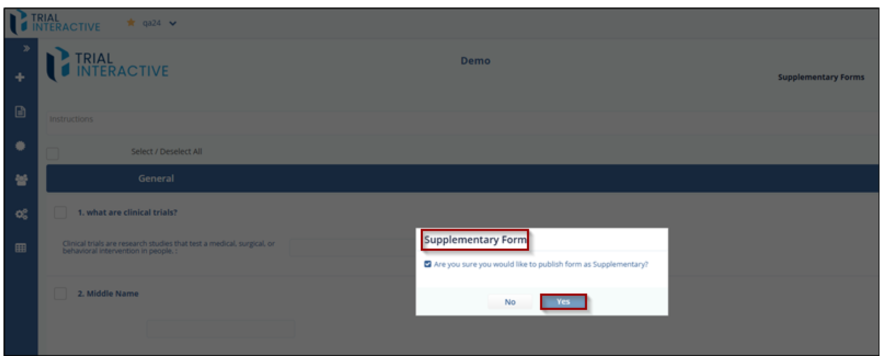
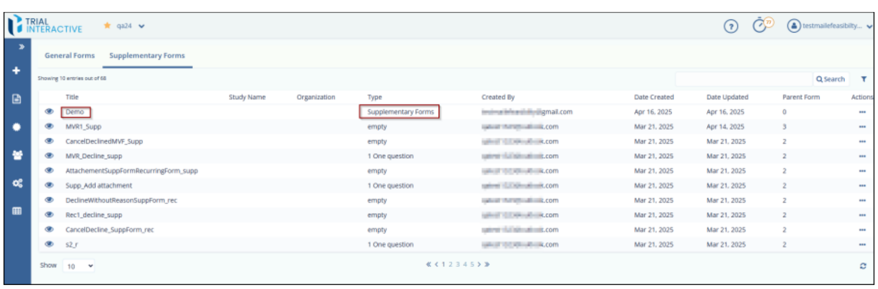


9. Supplementary Form pop up window. Click **Yes** in the Supplementary Form popup window.



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



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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.

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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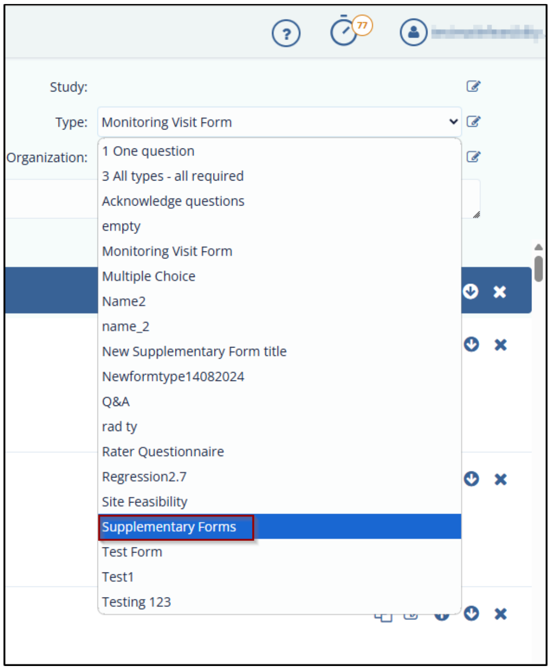
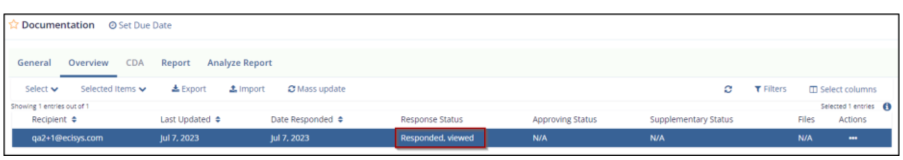


4. Select the Supplementary Forms option from the dropdown menu. Refer to the screenshot below.
5. Click **Close** button displayed at the bottom of the screen. You are redirected to the General Forms screen.
6. Click the **Refresh** icon to view the changes made in the form.

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.



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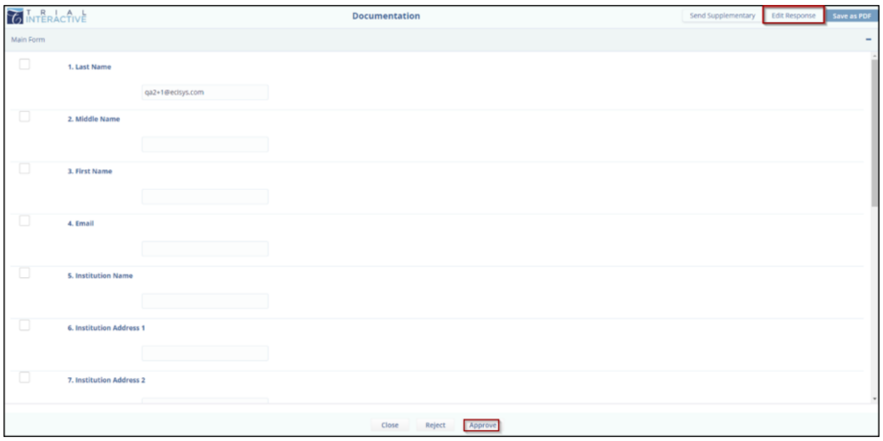
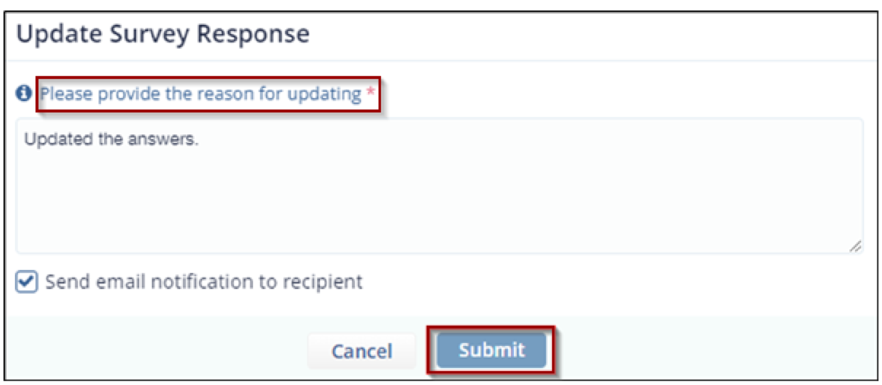
3. Click the **Edit Response** button displayed at the top right corner to enable the fields for entering your responses.
4. Notice that the Edit Response button is changed to Update Response button.
5. Enter the required answers in the fields and click **Update Response** button displayed at the top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



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**.



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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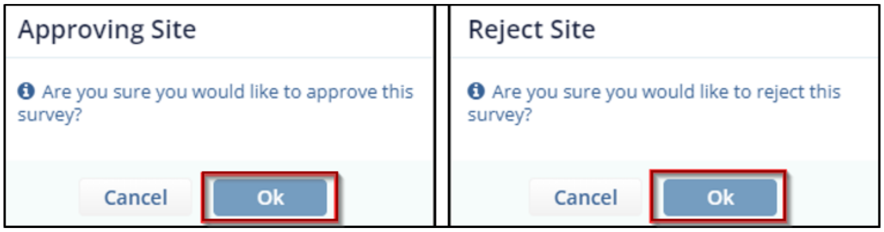
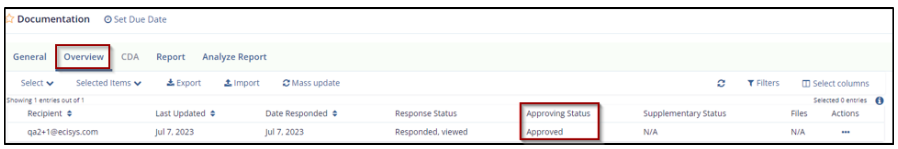


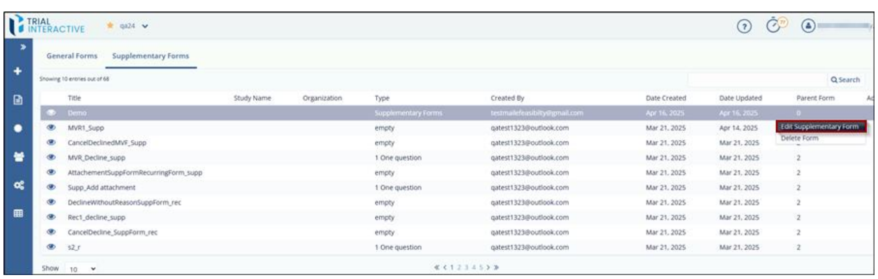
10. Click **OK** in the Approving Site popup window.
11. A notification is displayed - Survey has been approved.
12. Navigate back to the Form Overview page and click the **Refresh** icon to view the status as Approved or Rejected in the Approving Status column.



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.



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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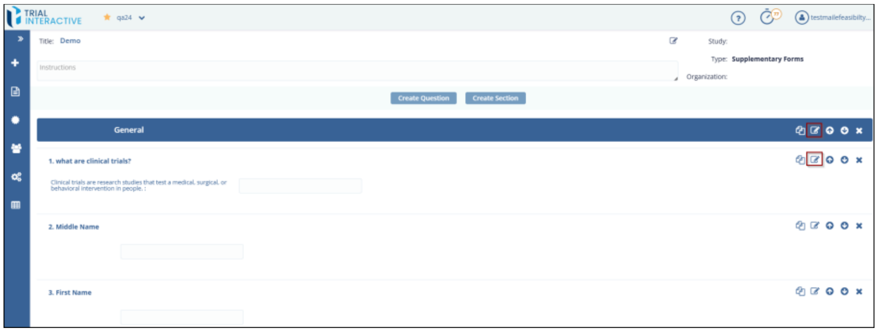

5. Click **Close** button displayed at the bottom of the screen after the changes are made.

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.

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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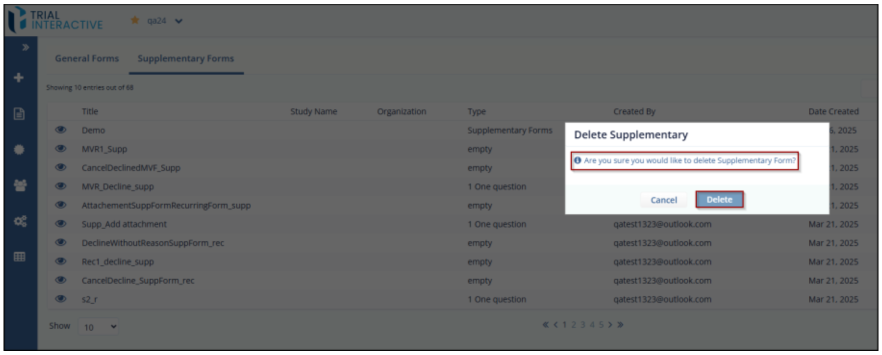
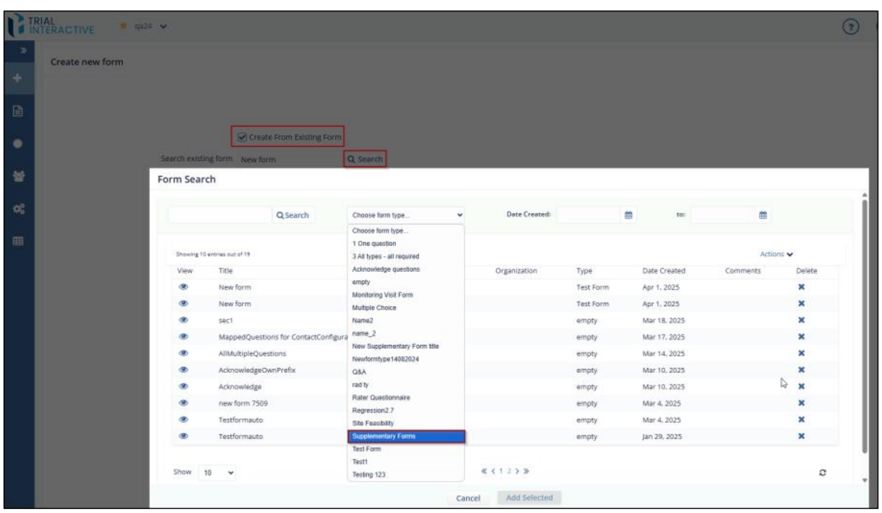


Note: Once the form is deleted it cannot be retrieved.

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.



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

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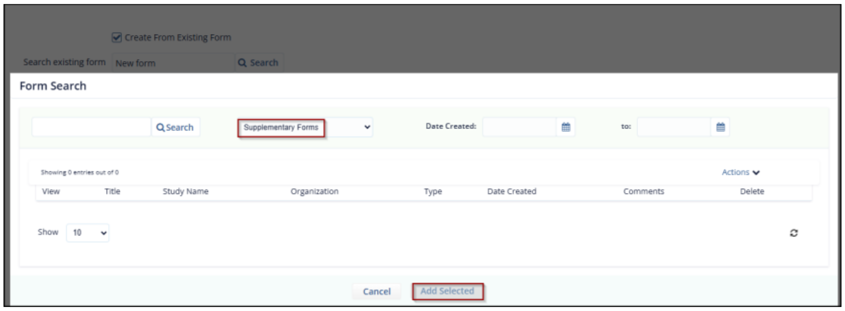
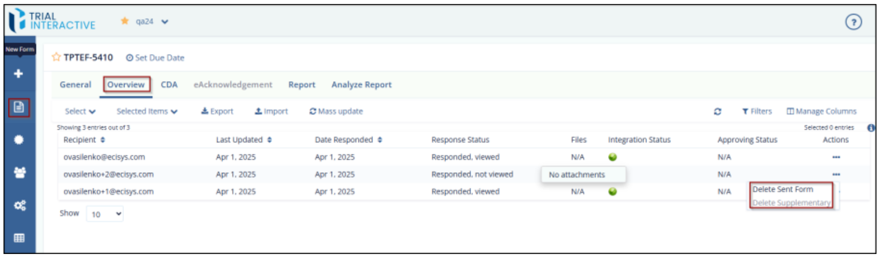


6.2.7 Delete Supplementary Form attached to a Parent Form

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.



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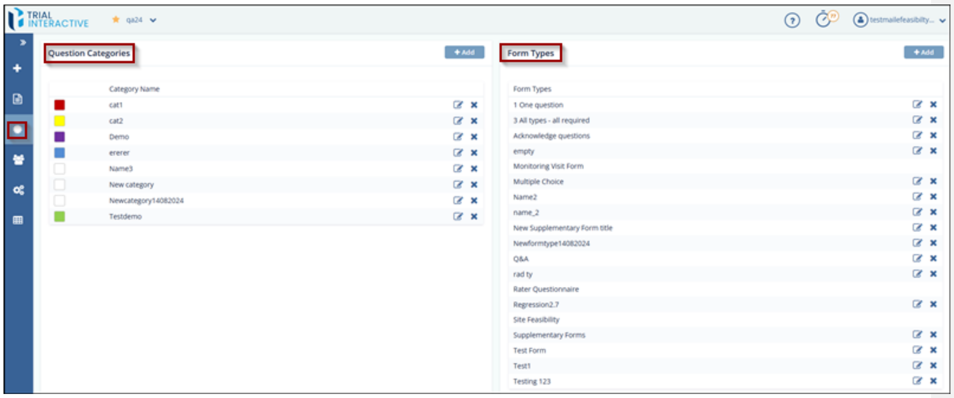
7. CATEGORIES

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.



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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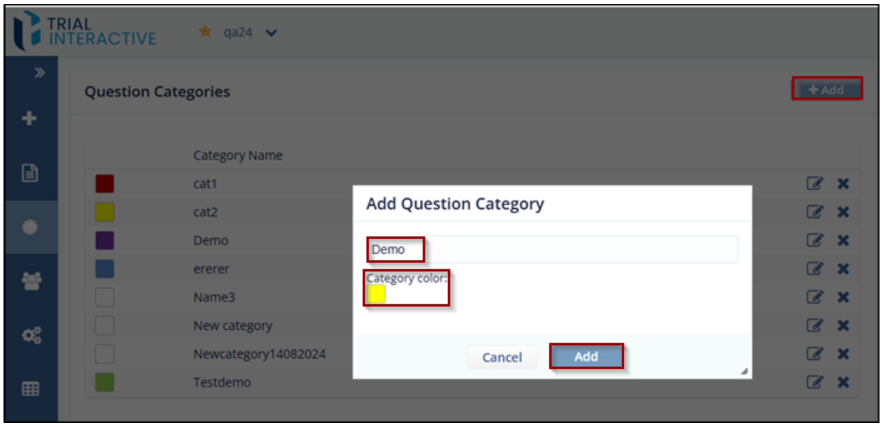
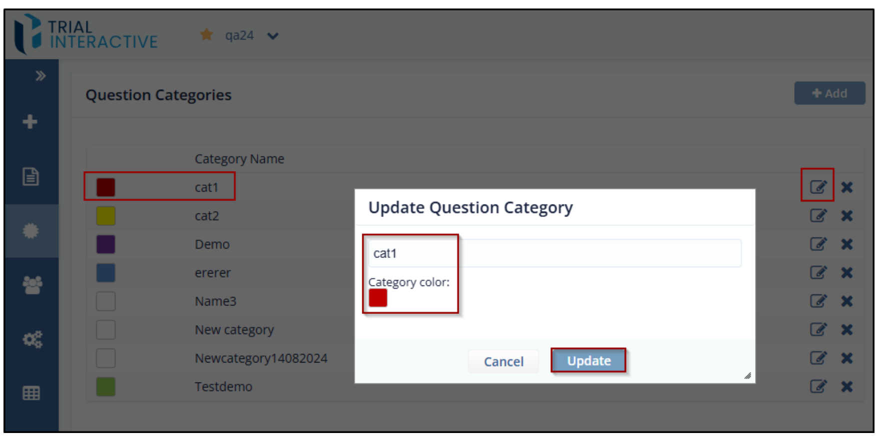


8. To update an existing category, click the **Edit** icon next to the category name. The Update Question Category dialog box opens.
9. Modify the **Title** and/or **Color** as needed, then click **Update** to save your changes.



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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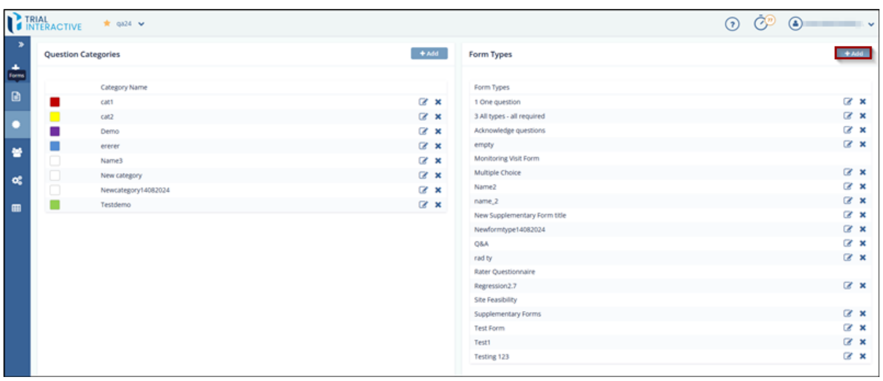
7.2 Form Types

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.



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

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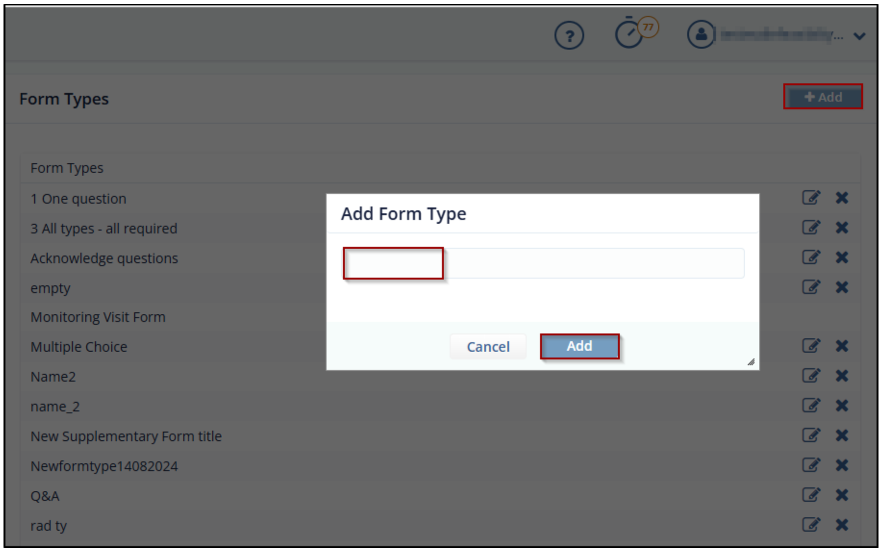
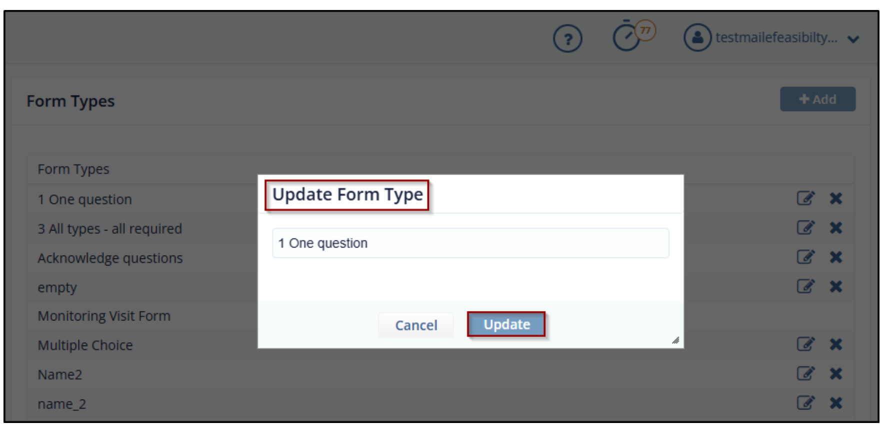


4. To update an existing category, click the **Edit** icon next to the category name. The Update Question Category dialog box opens.
5. Modify the **Title** and/or **Color** as needed, then click **Update** to save your changes.



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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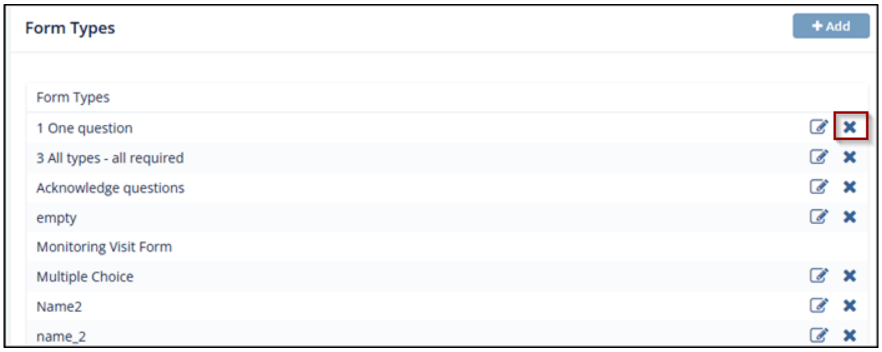

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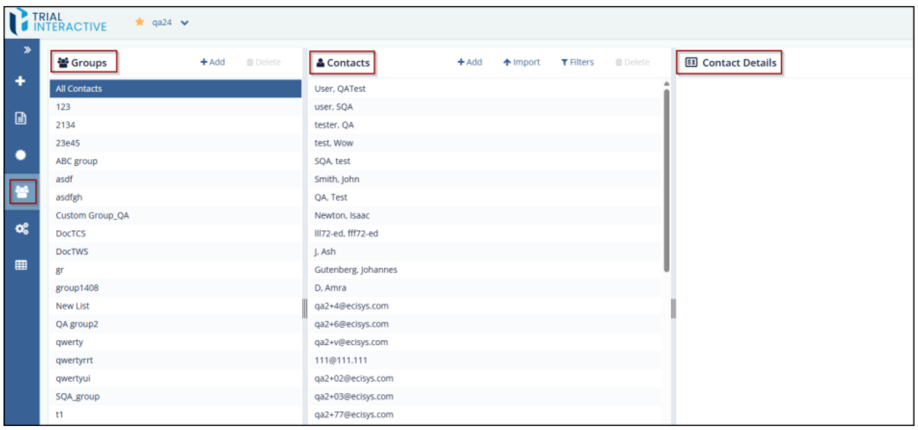
8. CONTACT

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



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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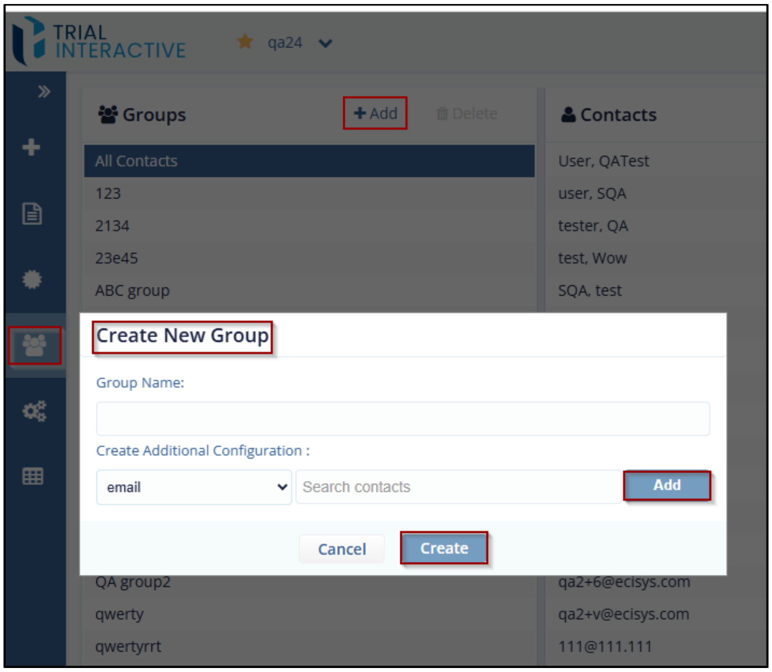

8.1.2 Deleting Group

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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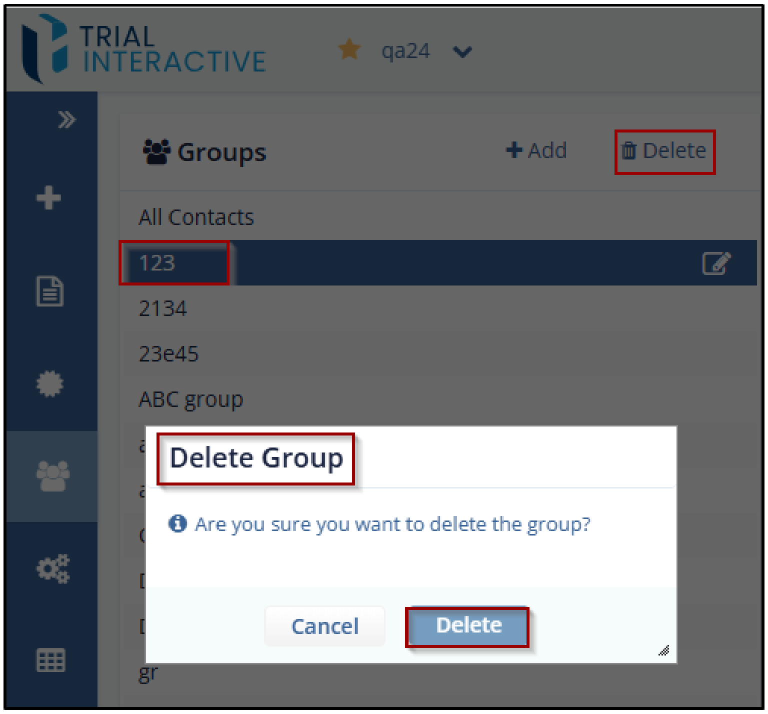

3. Click **Delete button** to delete the group or cancel to cancel the action.

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
- Search Contacts

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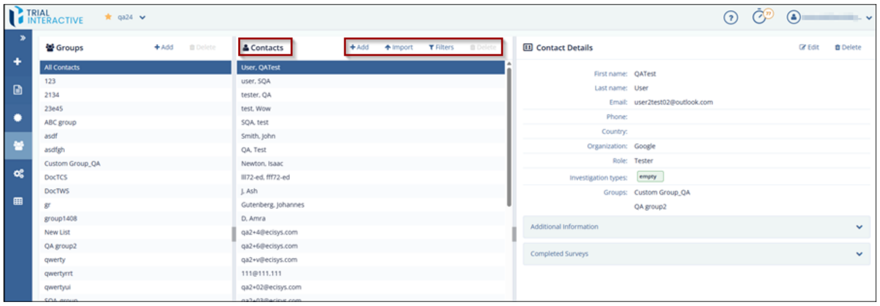
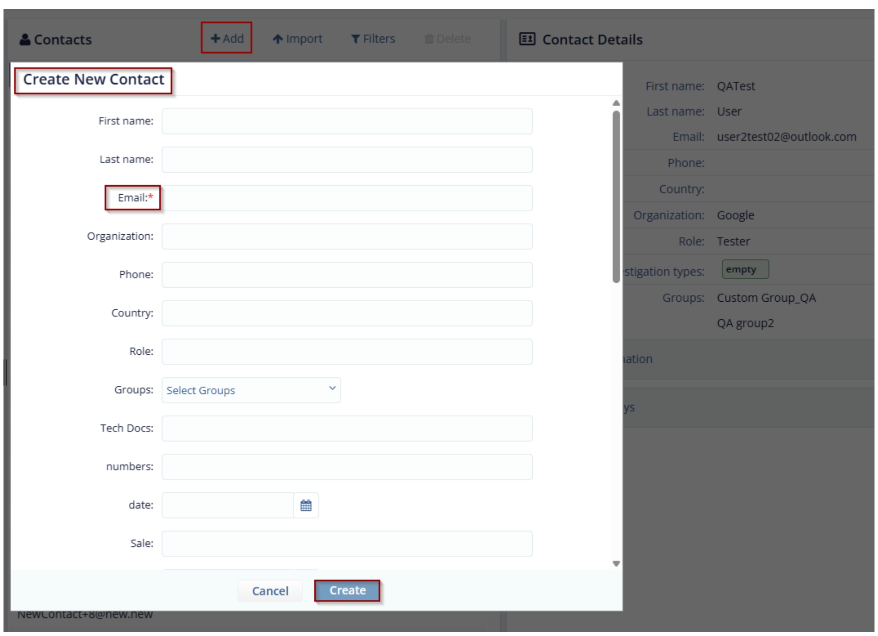


8.2.1 Add Contacts

To Add Contacts, follow these steps:

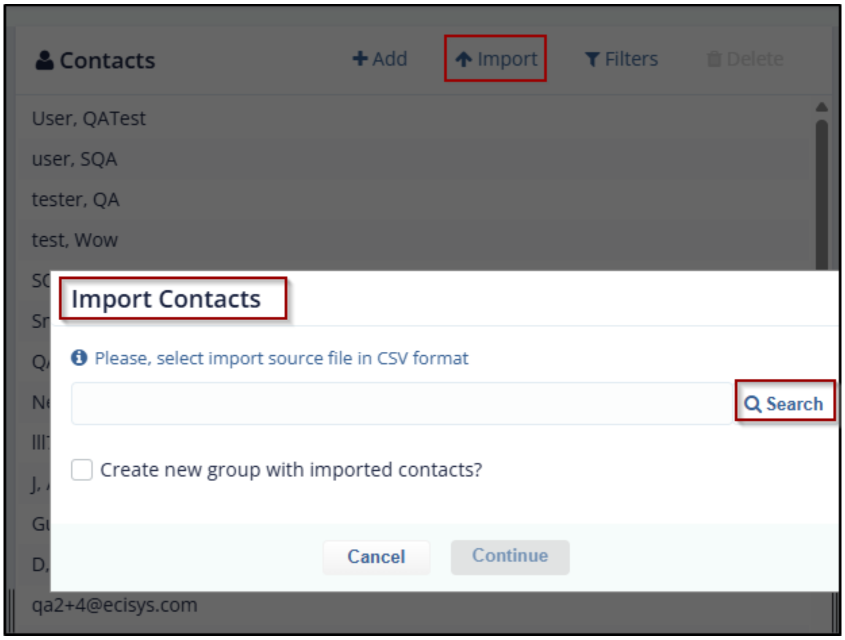
1. In Contacts section, click **Add** button. The Create New Contact pop up window is displayed.
2. Enter details in all the fields on the screen.
3. Click **Create** button to create a new contact that is added in the list on Contacts main screen.



8.2.2 Import Contacts

To Import Contacts. Follow these steps:

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



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

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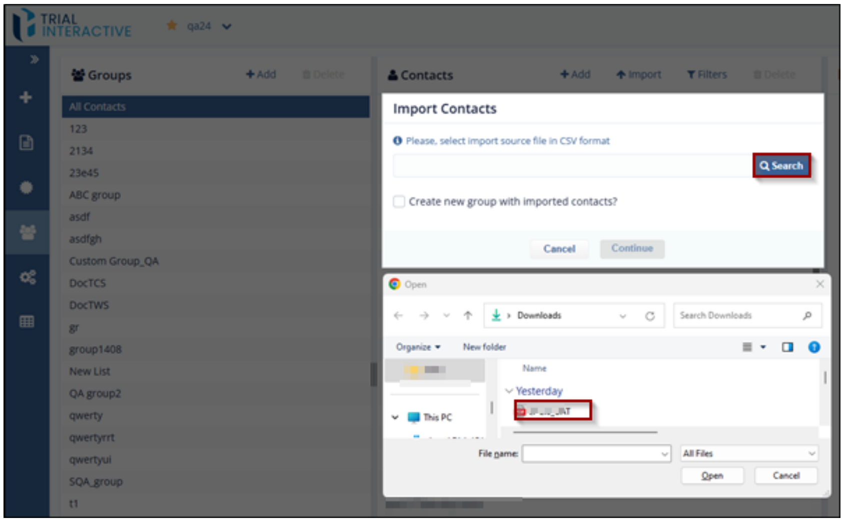

7. Select the required file to import and click Continue.
   Note:
   - The user can import only a .CSV file.
   - The **Source file** and the **E-Feasibility** should have at least few common fields.
   - The system gives an error if there are no matching fields in **Source file** and **E-Feasibility**.

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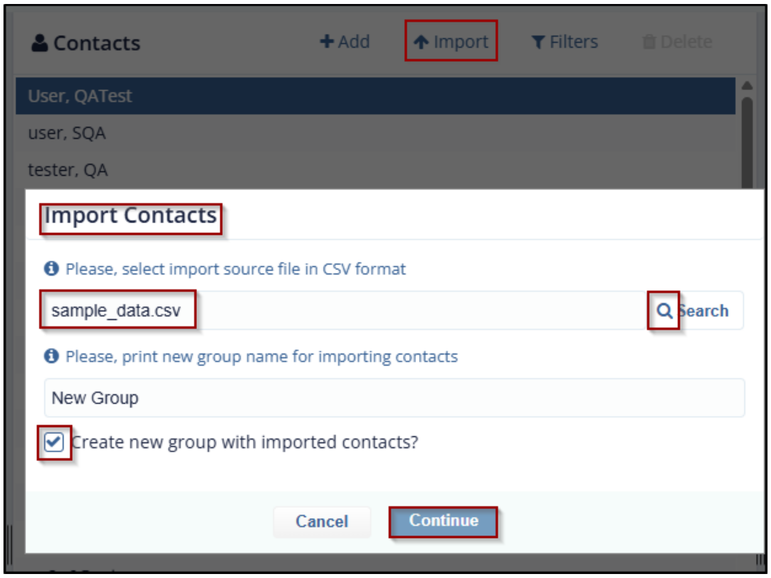

8. The Field Association dialog box opens. Setup the mapping between E-Feasibility fields and the Source file fields.

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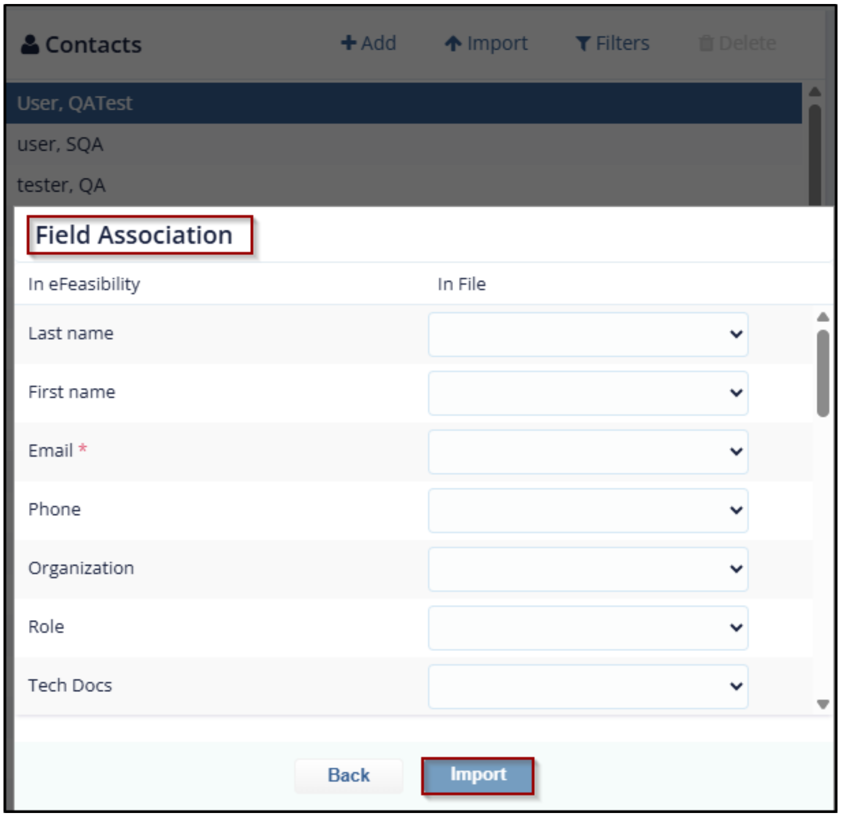

9. Once the mapping is done, click the Import button. A dialog box opens displaying the progress of the import result along with the total count of Contacts, imported contacts, updated contacts and Failed import.
10. Click **OK** button to import contacts to All Contacts list.

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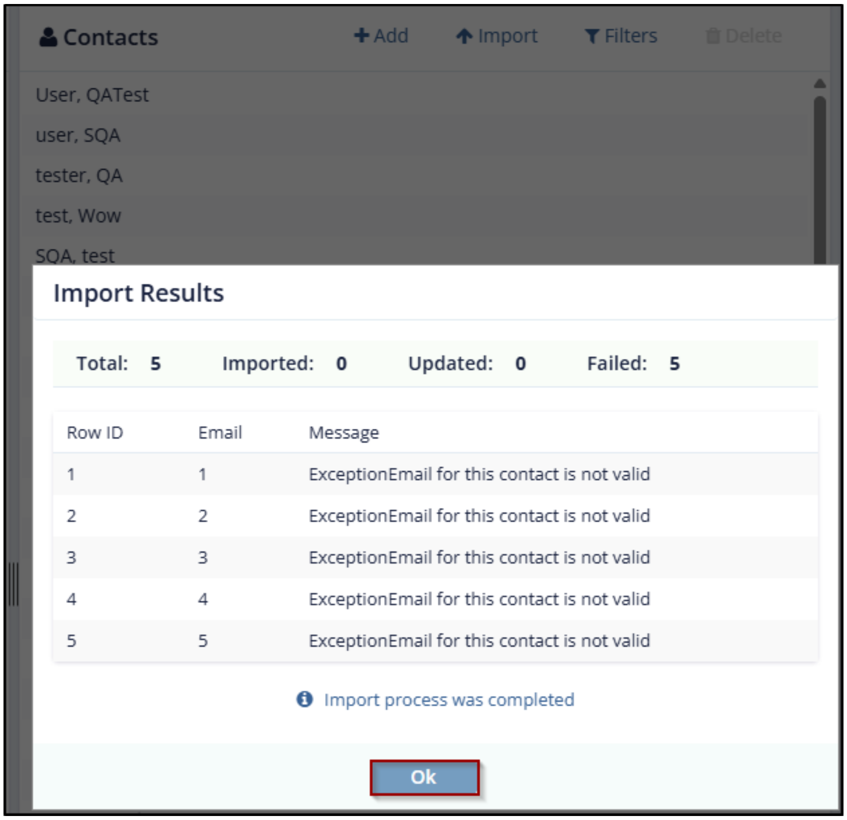

8.2.3 Import Contacts in a Group

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

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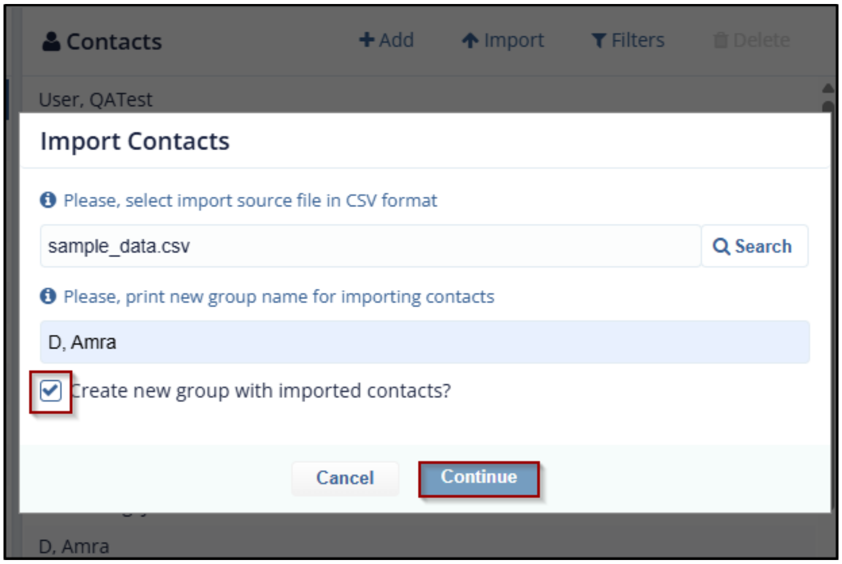
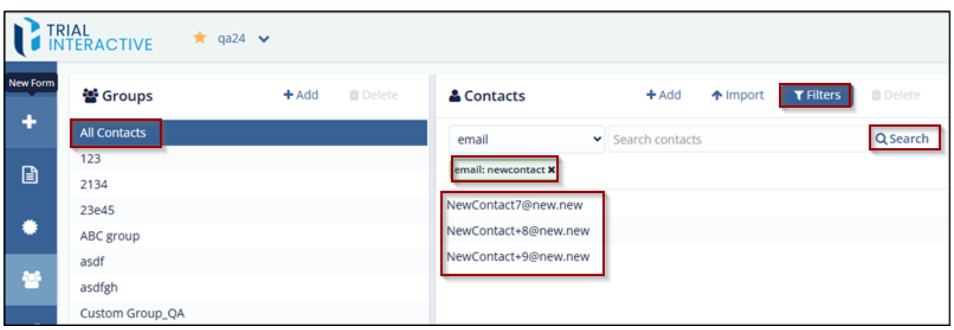


8.2.4 Search Contacts

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.



8.3 Contact Details

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

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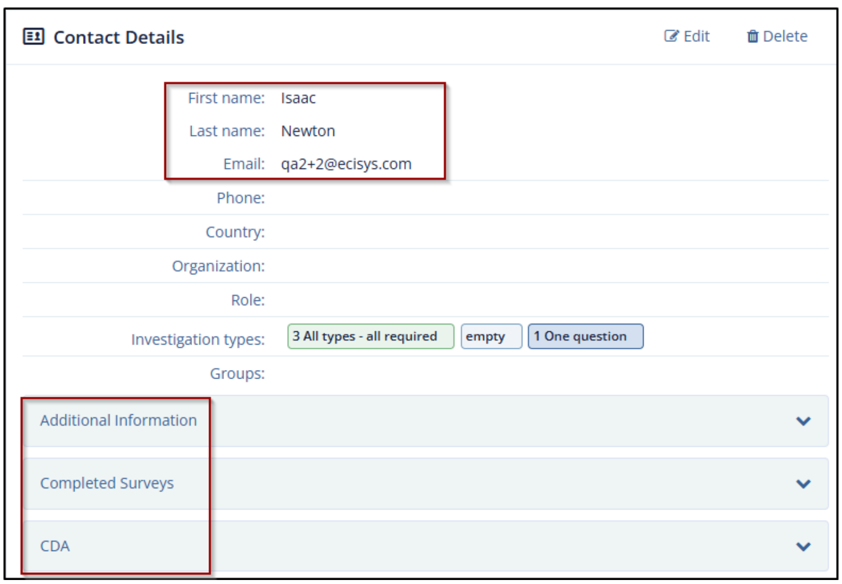
The Contact Details section displays the following sections:

- 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.
  - **Preview:** Click the **Preview** icon to open the form in a new tab.
  - **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 to horizontal line after expanding the section. Click the icon to collapse the section. Refer to the below screenshot.



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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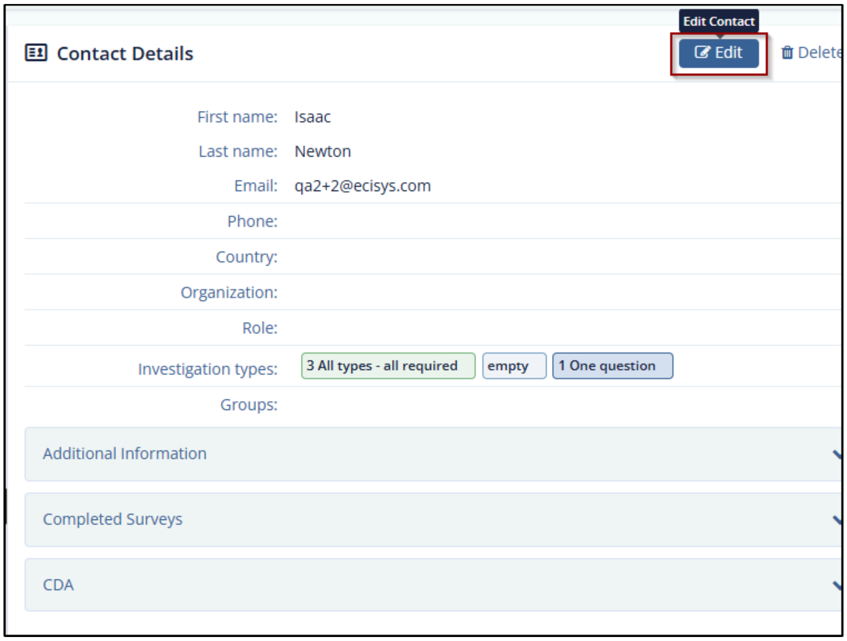

2. The Contact Details section displays all Contact fields that are editable along with three buttons:
   - Cancel (Edit button changes to Cancel) in the top left corner
   - Delete Contact in the bottom left corner
   - Save Contact in the bottom right corner.

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

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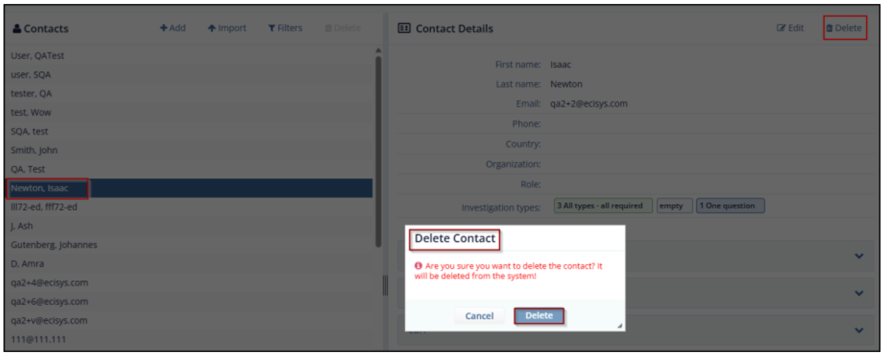
- Click the Delete button from the Contact Details section. The Delete contact pop up window is displayed.
- Click **Delete** to execute the action.



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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
   - API Account ID
   - RSA Key

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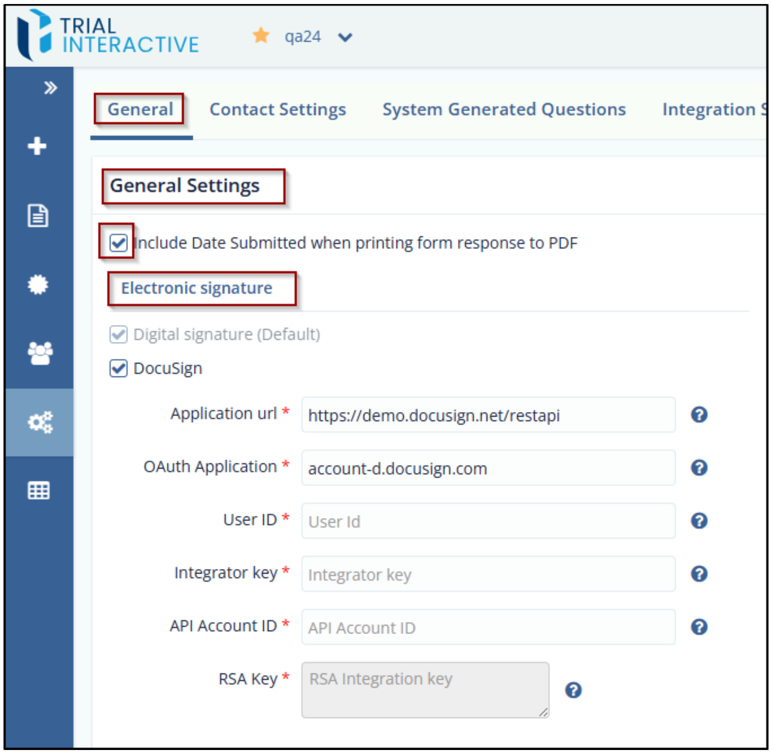

9.1.2 Electronic Signature Panel

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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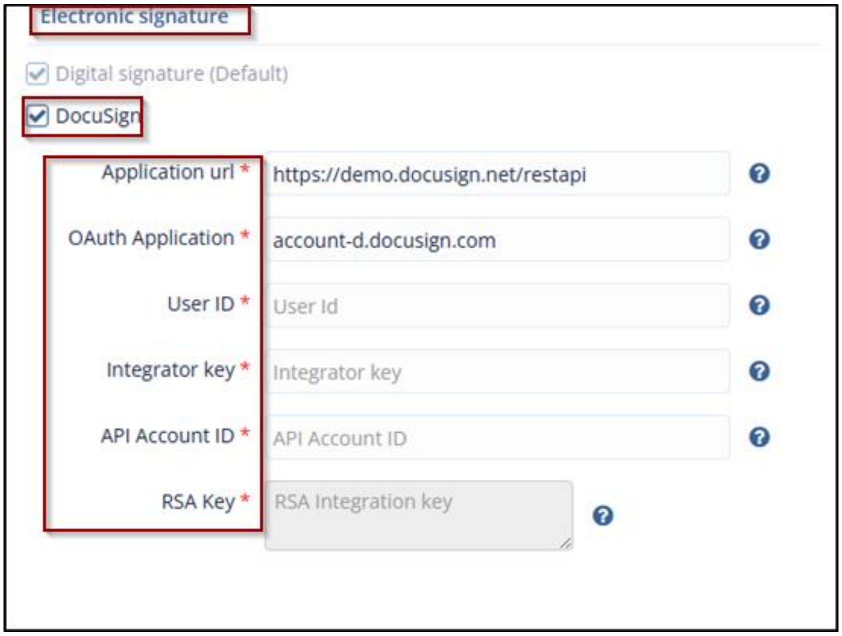

9.1.3 Country Settings

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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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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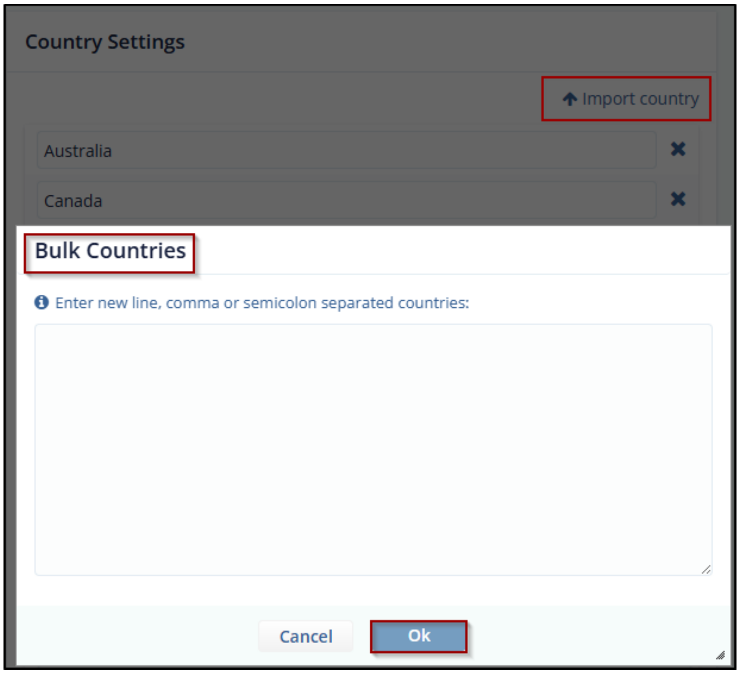

9.1.4 Adding Countries Manually

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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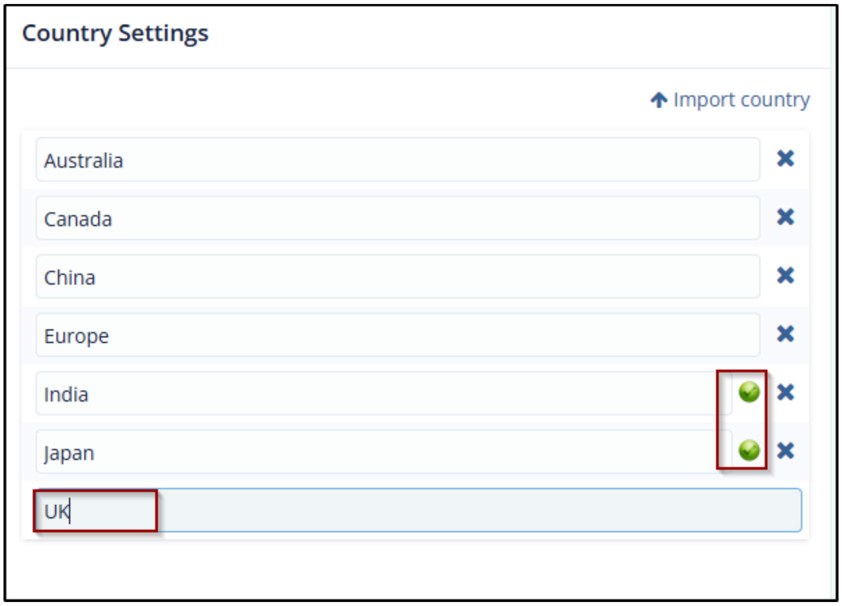

3. Enter the country name in the textbox with the text Another….and press Enter on the keyboard. The country gets added to the list with a green tick next to it.
4. Click cross next to the Country name to remove the country from the list.

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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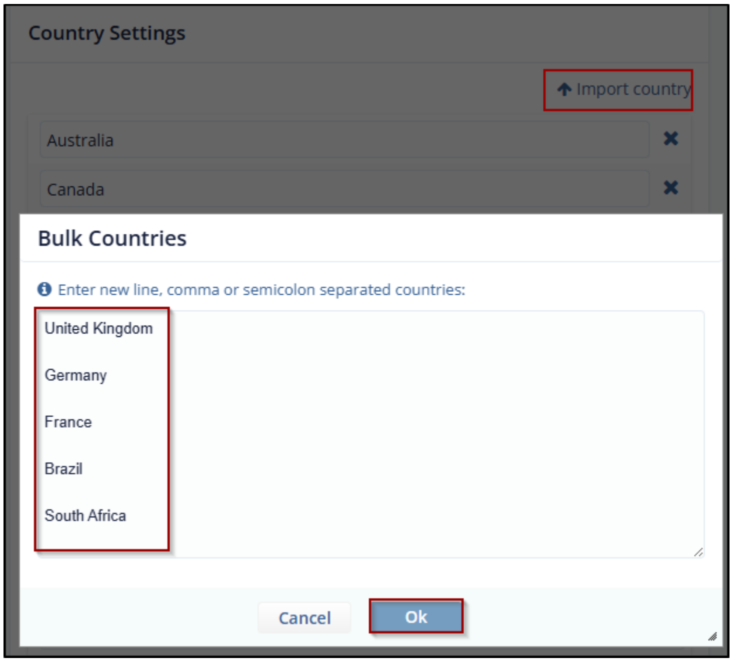

9.1.6 Email Domains

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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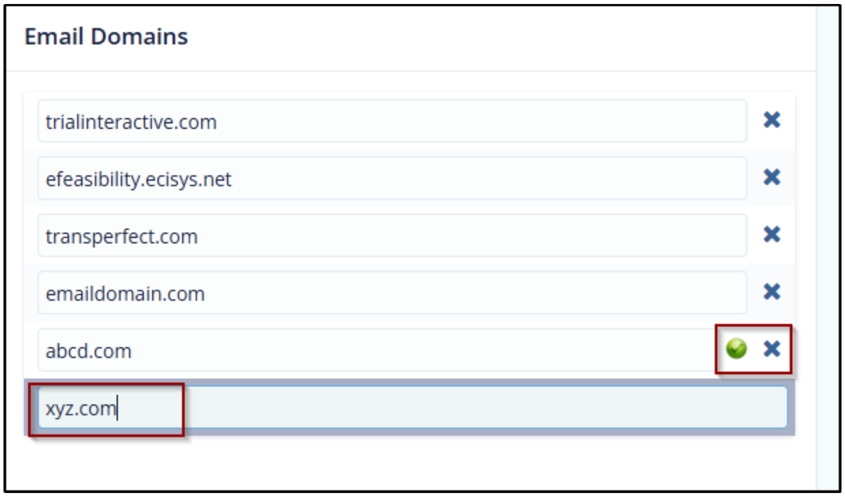
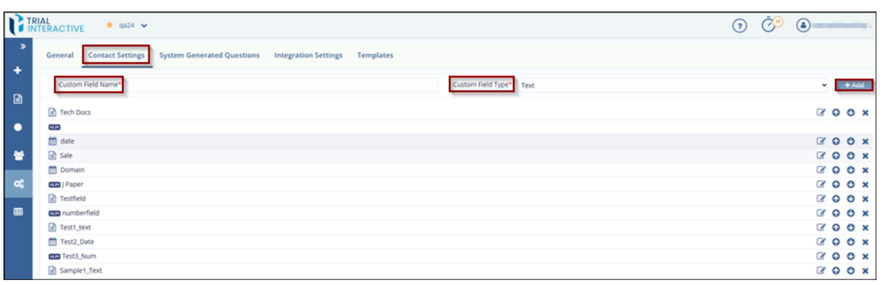


9.2 Contact Settings

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:

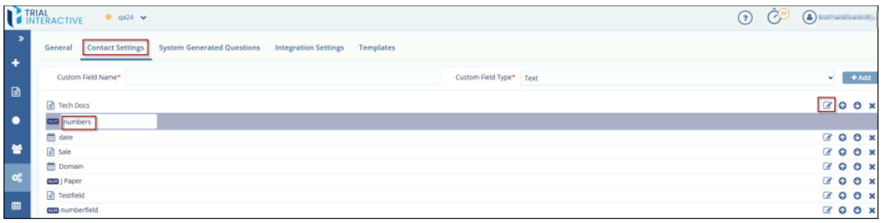
1. From the **Settings** menu, click **Contact Settings**.
2. The **Contact Settings** tab displays two fields:
   - **Custom Field Name**: A textbox to enter the name of the custom field.
   - **Custom Field Type**: A dropdown to select the field type (Text, Date, or Number).
3. Enter the desired field 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.



9.2.1 Editing Custom Field

To Edit Custom fields, follow these steps:

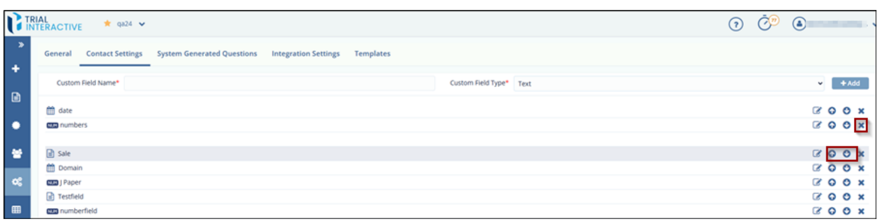
1. Click the Edit icon next to the field to edit the Custom Field Name to make it editable.
2. Enter the new name and hit Enter on the keyboard. The changes made to the field are saved.



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-and-drop the field to the required position.
2. Click the Cross icon to remove the Custom Field from the list.



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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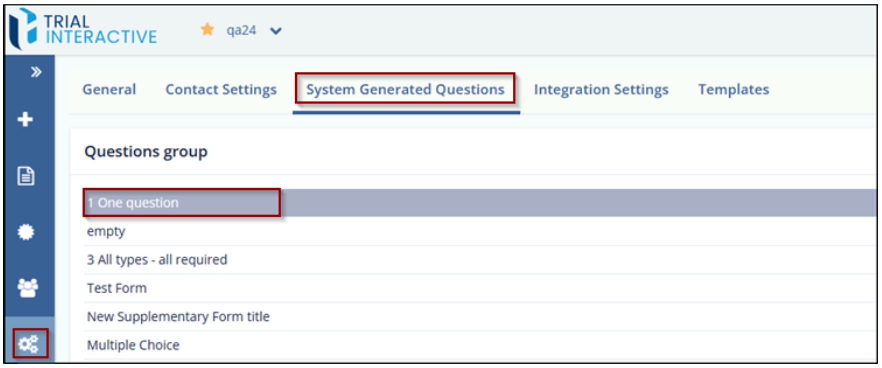
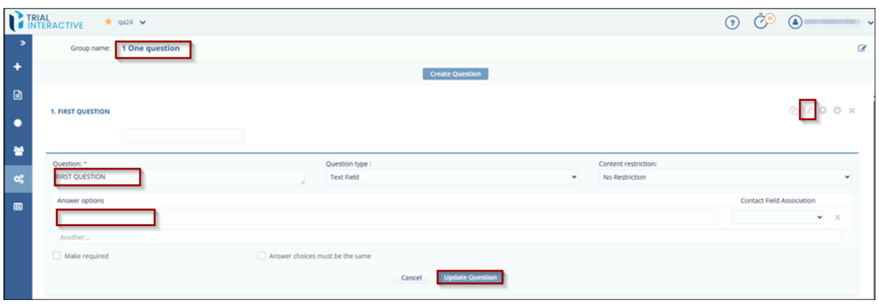


3. Click on the name of any listed Question Group to view its details.
4. To edit a question, click the **Edit** icon next to the question.



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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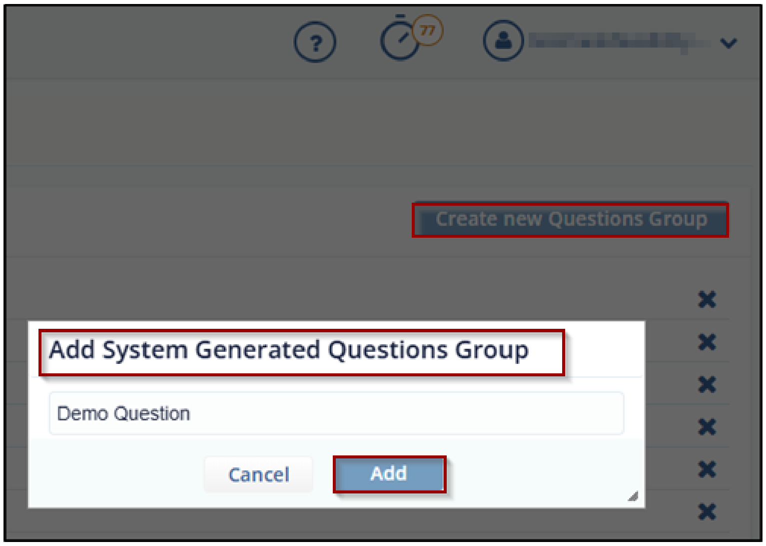
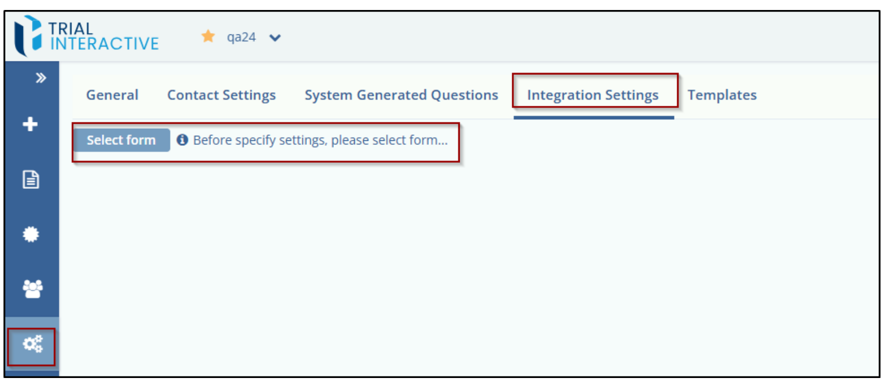


9.4 Integration Settings

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.



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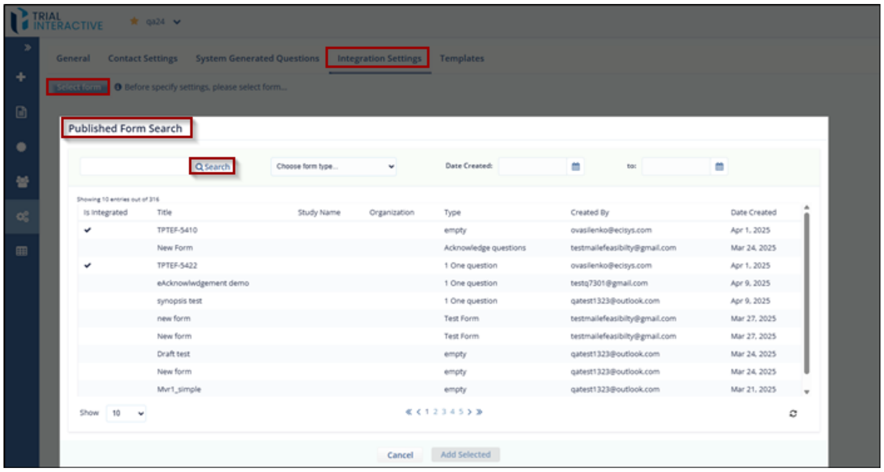
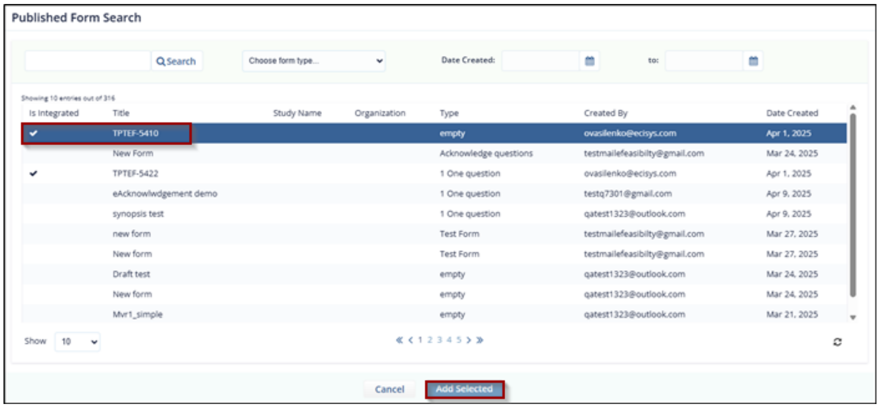
To Configure Integration setting, follow these steps:

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.



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



7. You will be redirected to the **Integration Settings** window.
8. The selected form title appears in the **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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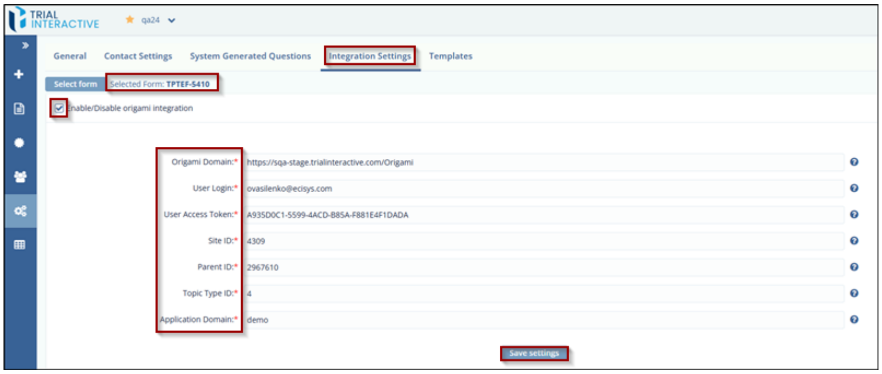
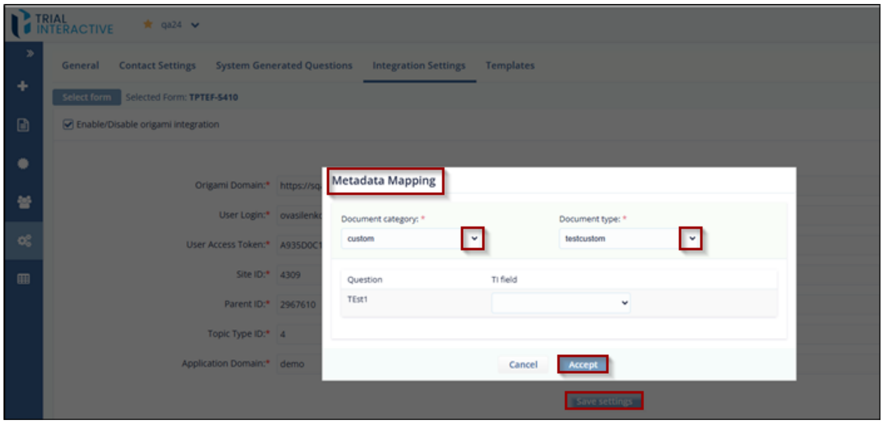
11. Enter the required details as applicable.
    Note: For detailed guidance on each parameter, refer to the **Origami Settings** section.
12. After completing all required fields, click **Save Settings**.



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.



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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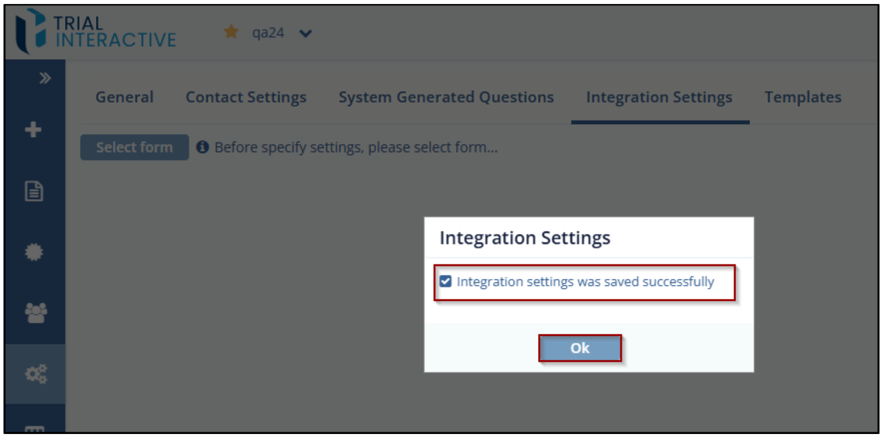

17. When a **manager** sends a form via PDF in a survey email, the **Submitter** downloads, completes, and submits it. Upon submission:

   - 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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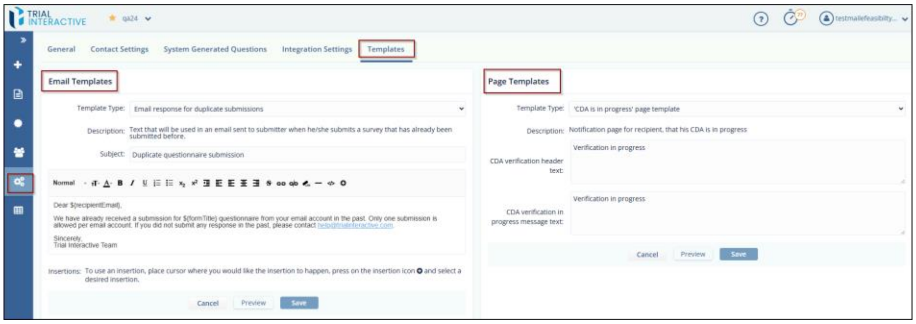
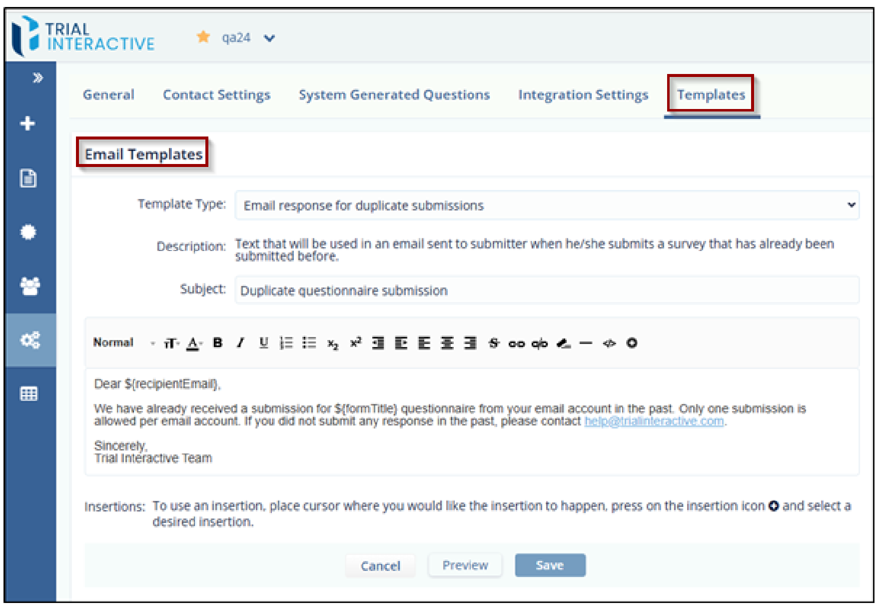


9.5.1 Email Templates

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.



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.
TT	**Font Size**: Allows you to change the text size.
A	**Font Color**: Allows you to change the text color.
B	Allows you to make the text **Bold**.
I	Allows you to make the text ***Italics***.
U	Allows you to make the text **Underlined**.
	Ordered List: Allows you to insert ordered list.
	Unordered List: Allows you to insert unordered list.
x_2	**Subscript**: Allows you to insert the subscript.
x^2	**Superscript**: Allows you to insert the superscript.
	Outdent: Allows you to align text to the **Left.**
	Indent: Allows you to align text to the **Right.**
	Justify Left: Allows you to align text to the left justified.
	Justify Center: Allows you to align text to the center.
	Justify Right: Allows you to align text to the right justified.
~~S~~	**Strike Through**: Allows you to strike the text.
	Add Link: Allows you to insert a link to surveys or other references in a mail. Refer section Adding a Link in the mail for more details on this.
	Remove Link: Allows you to remove the link.
	Cleaner Style: Allows you to remove the text formatting.
	Horizontal Rule: Allows you to insert a line below the text.

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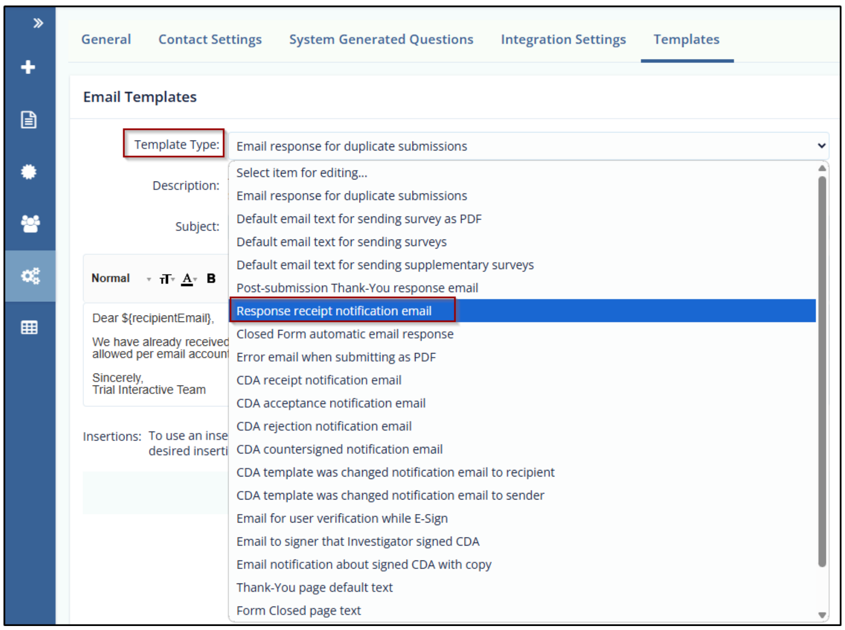
</>	**Source**: Allows you to view the text in **html format.**
	Insertions: Allows you to insert in between text. Insertion contains two types: Survey Title: Allows to insert the Survey title. **Recipients Email**: Allows to insert the Recipients Email.

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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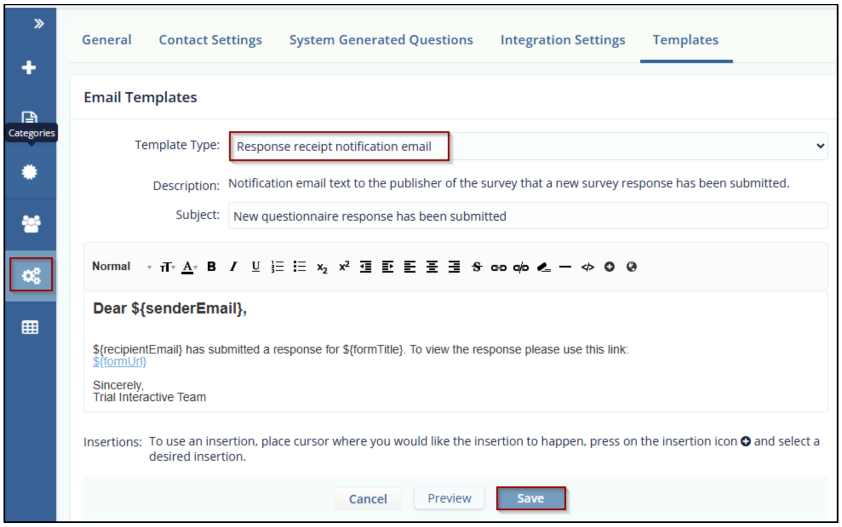

Adding a Link in the Email

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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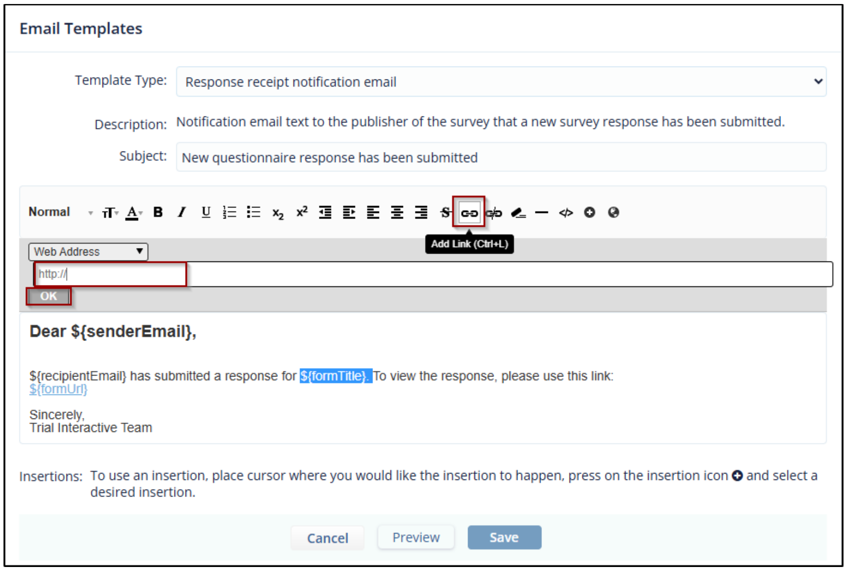

6. Click the Save button. The changes made in the email are saved and when Submitter clicks the link in a mail sent to him by manager, he/she is prompted to the particular page of a link on the browser.

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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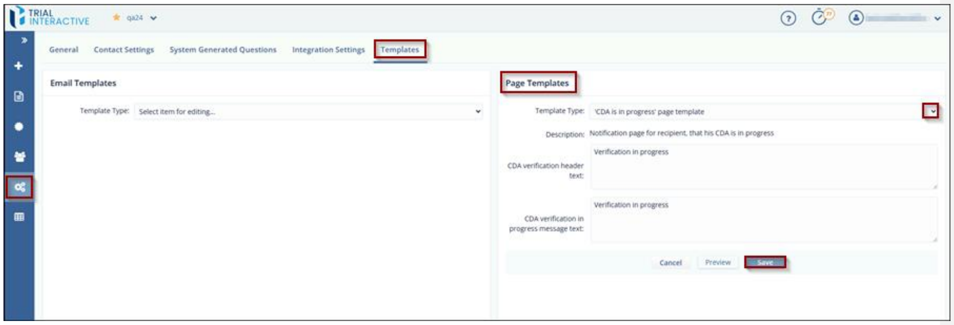

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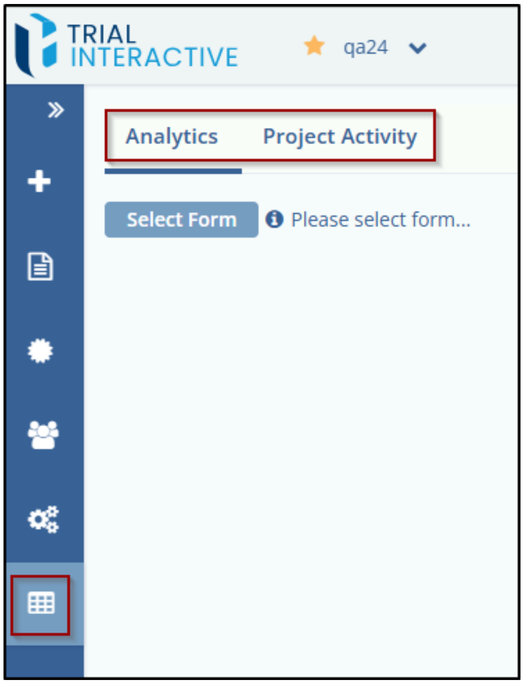
10. REPORTS

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**



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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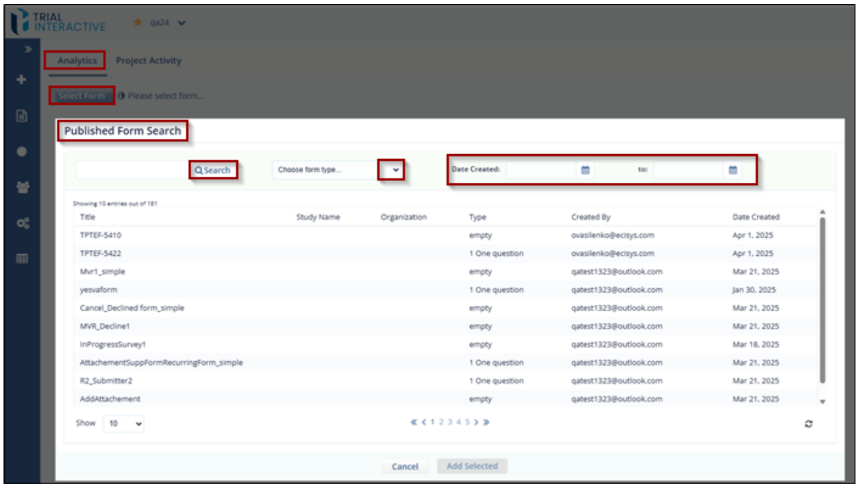
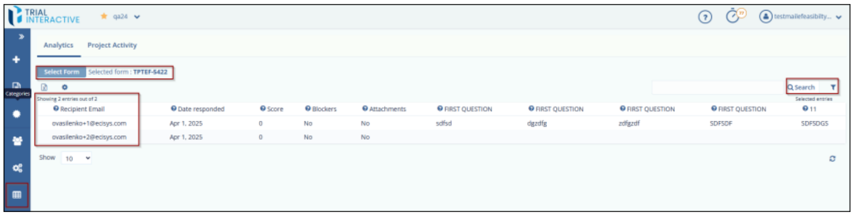


4. The selected form opens, displaying a table with form metadata and associated questions. The following icons are available above the table:
   - Search icon.
   - Filter icon
   - Choose from type dropdown.
   - Date Created to.



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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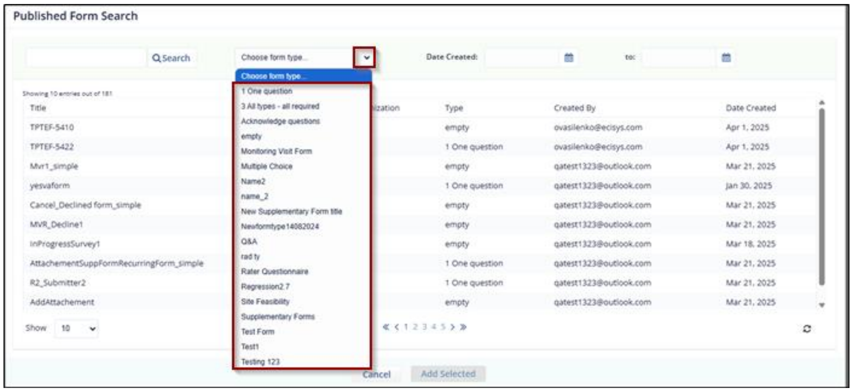


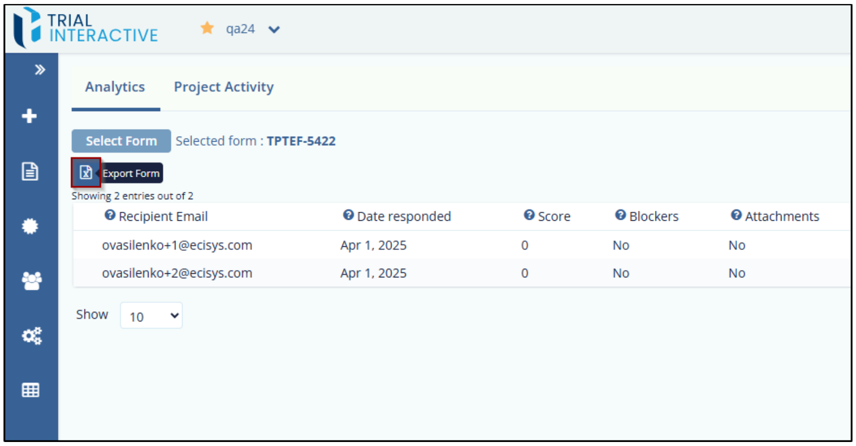
Note: The table displays the list of only responded surveys for a particular form.

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.



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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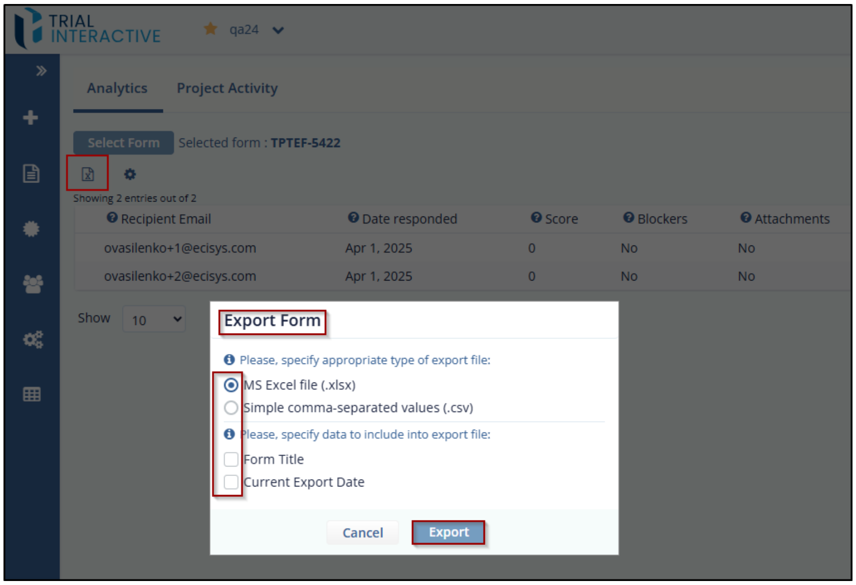
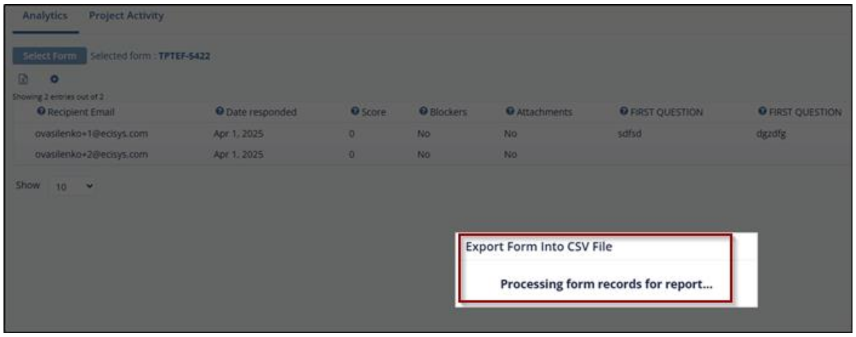


3. Select the required options and then click Export. The exported form opens in the excel file which displays all the details of the form. Notice that the selected checkboxes also display in the file.



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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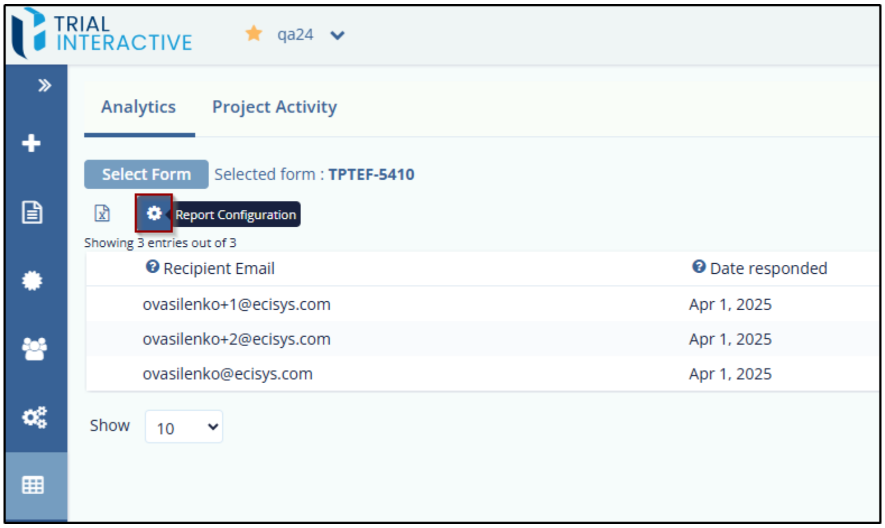
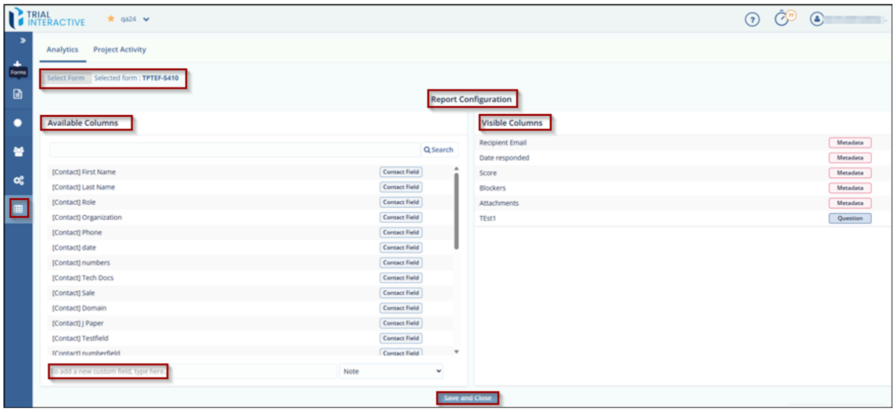


Report Configuration contains:

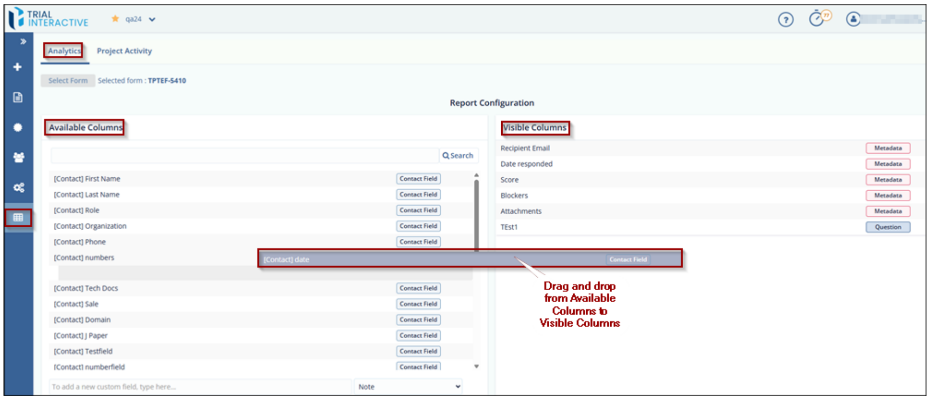
- Available Columns: This panel contains a Search box to search for the column fields and the cells of Contact Field type with the button in blue color. These contact fields are defined in **Settings→ Contact Settings.**
- Visible Columns: This panel displays the cells of Metadata type in red color and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



2.1 Adding Fields from Available Columns to Visible Columns

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

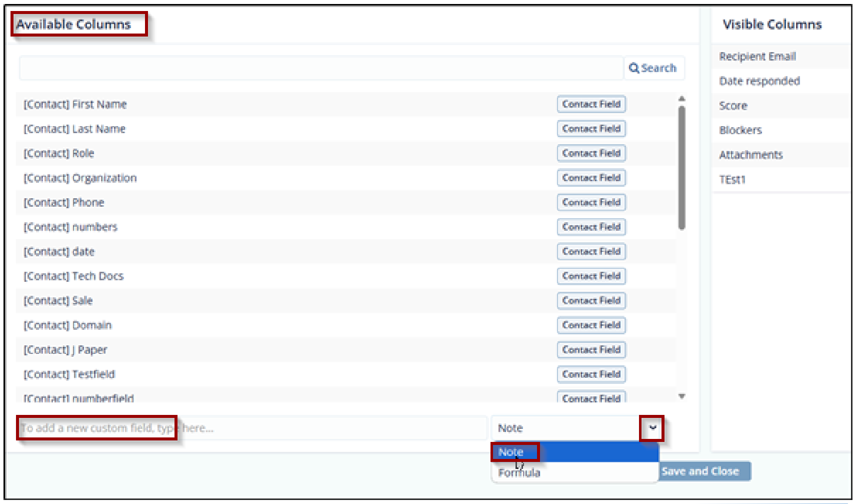
1. In the **Report Configuration** dialog box, locate the **Available Columns** panel.
2. **Drag and drop** the desired fields from the **Available Columns** panel to the **Visible Columns** panel.
3. The selected fields will appear in the report table and will also be included in the exported Excel 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.



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.



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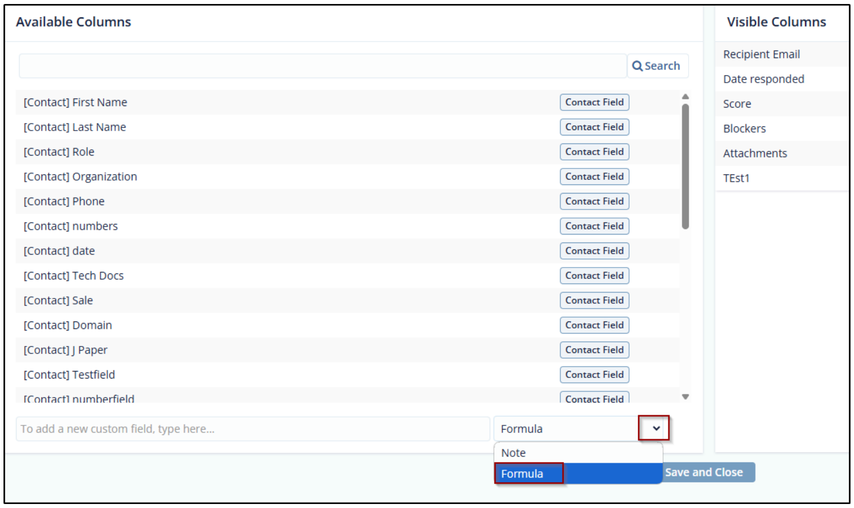
2.3 Adding Custom Fields as Formula

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.



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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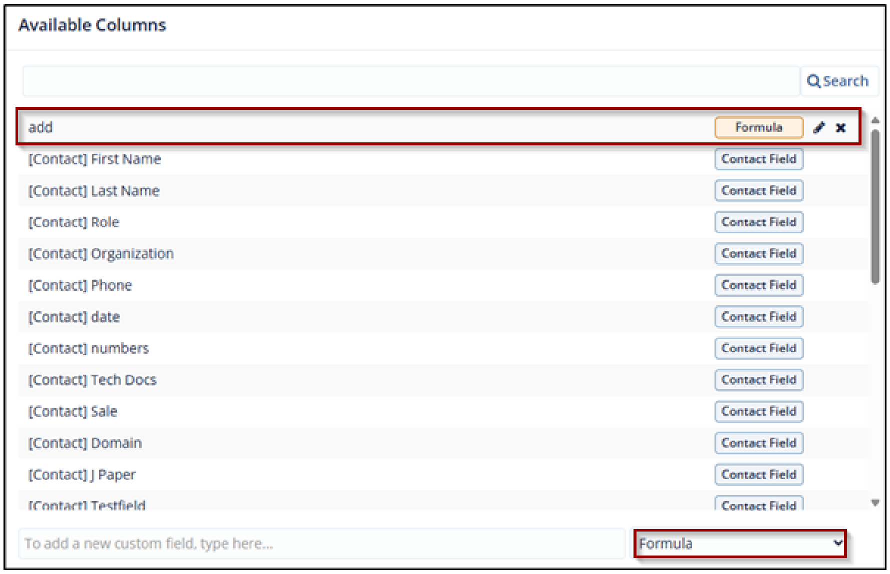

4. Create formula for the question using the functions.
5. Below table defines the symbols of the Formula editor.

Symbol	Function	Symbol	Function
=	Equal to (==)	+	Add
≠	Not Equal to (! =)	–	Minus
>	Greater than	×	Multiply
<	Smaller than	÷	Divide
≥	Greater than equal to	lal	Percentage %
≤	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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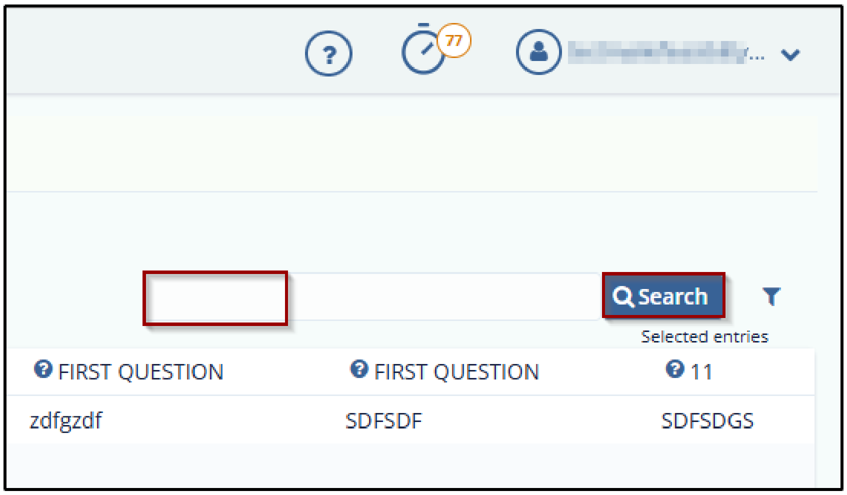
- On creating custom field additional property for the survey, all surveys for specified form are able to store some information in new property.
- The new added custom fields are editable which allows you to enter the value for the field dynamically.

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.

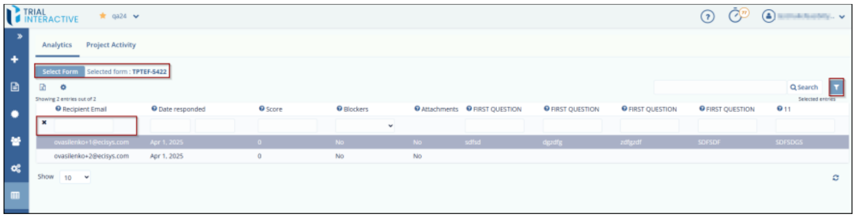


10.1.4 Filter

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:

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



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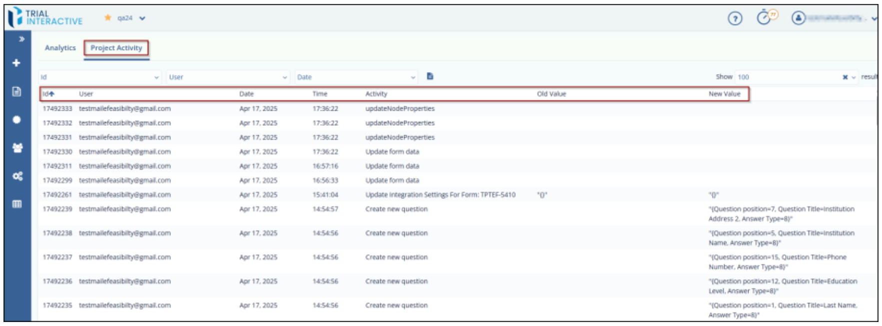
10.2 Project Activity

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.



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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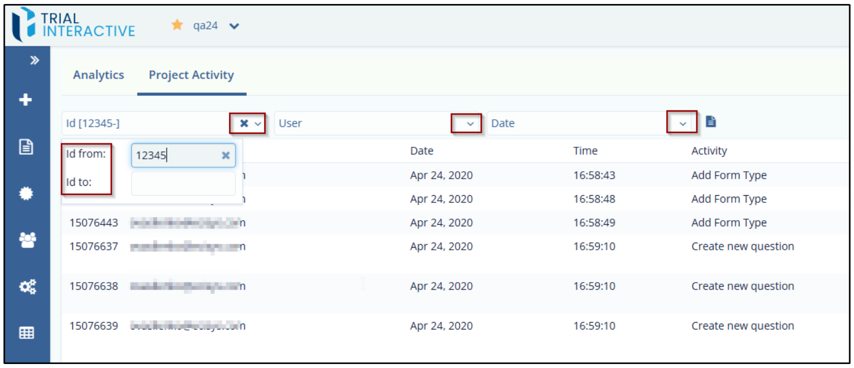
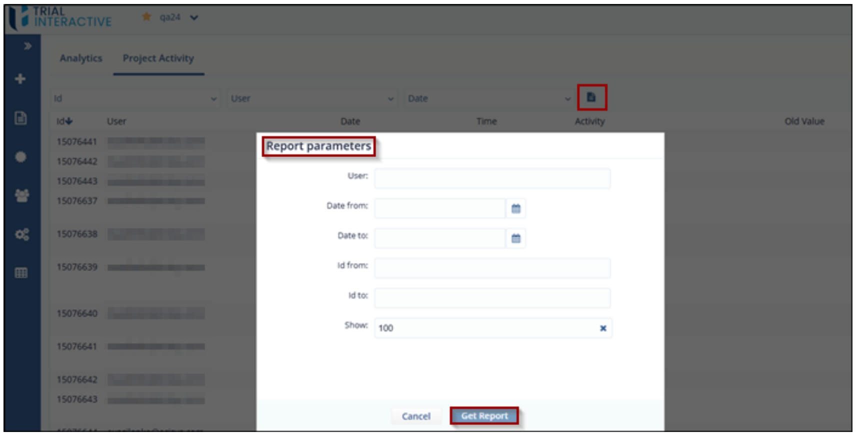


10.2.2 Report Parameters

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.



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