

# How to Personalize the Document Grid

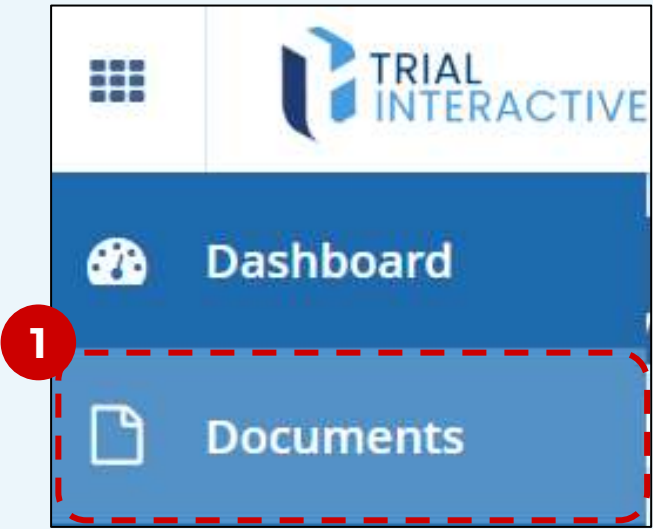
TI version 10.8

APPLICABLE TO:

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

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

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

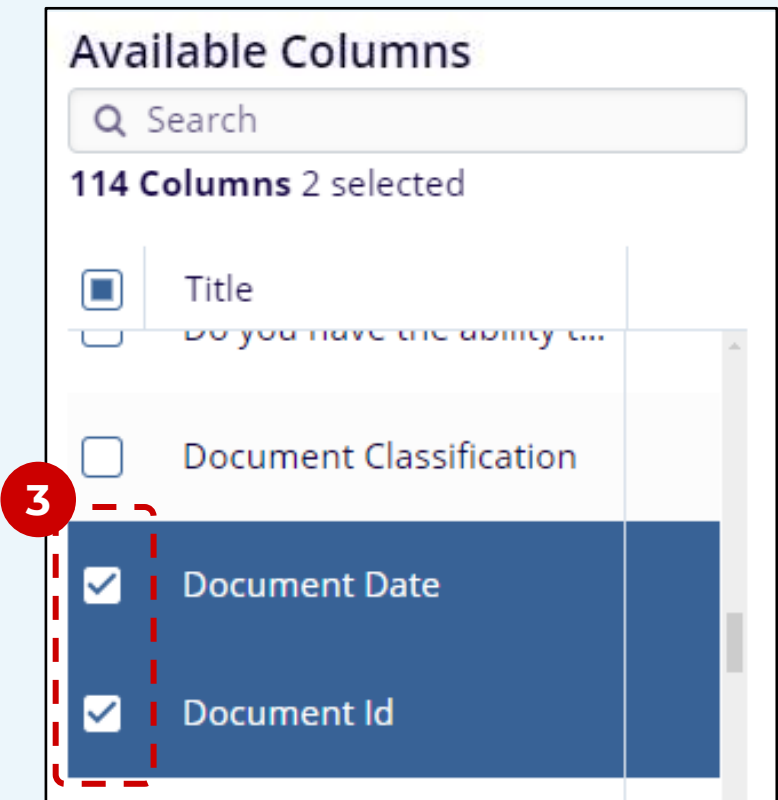


2 In the grid heading, locate and click the **Manage Columns** button.



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

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



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

# How to Personalize the Document Grid

TI version 10.8

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

	Title	Name	Width
<input checked="" type="checkbox"/>	Submitted Name	Title	100
<input type="checkbox"/>	Document Issue	\$\$DocumentIssues\$\$	100
<input type="checkbox"/>	Document Id	\$\$DocumentId\$\$	100
<input type="checkbox"/>	Document Date	Document Date	100

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

Buttons: Cancel, Set View, Save Changes

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

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

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

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

Save View dialog fields and controls:

- Name: Enter View Name (Name is required)
- Make Default for Me: [Toggle]
- Make default for All: [Toggle]
- Save As New: [Toggle]
- Buttons: Cancel, Save

# How to Personalize the Document Grid

TI version 10.8

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

