

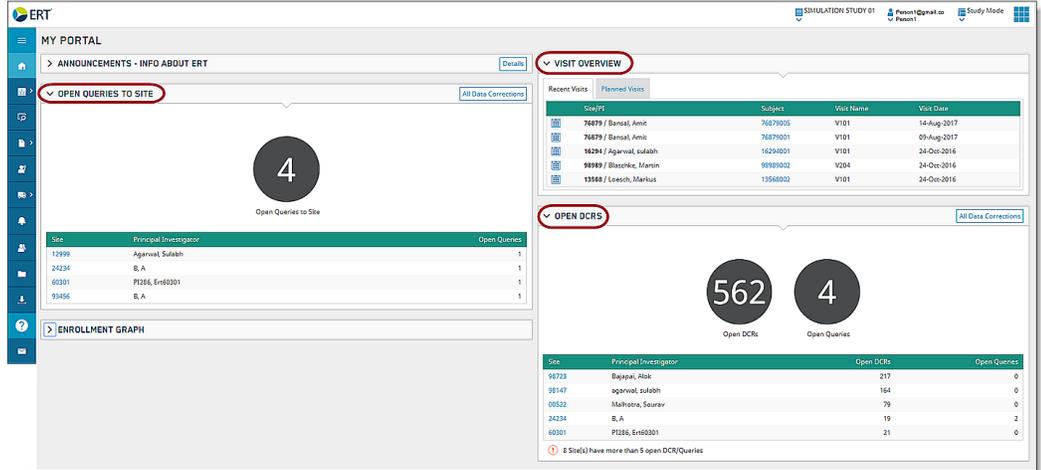
## WHAT IS THE DASHBOARD & HOW DO I NAVIGATE IT?

After you log in to the Portal, the **Dashboard** is the first window you see, and shows the following:

- **Navigation icons** on the left side of the window represent sections of the Portal that you can access. The icons you see depend on your type of access and differ from user to user.

- **Widgets** on the right side of the window represent *quick* views of study information; for example, the figure on the right shows open widgets for **Visit Overview**, **Open Queries to Site**, and **Open DCRs**.

- **Title Bar** information at the top of the window contains the *Protocol Name* (“Simulation 01” in this example), the *User Name* (“Person 1” in this example), and the *Study Mode*.



### Navigation Icons

1. To view which areas of the Portal the icons represent, click the

**Display** icon . A panel slides to the right displaying the sections.

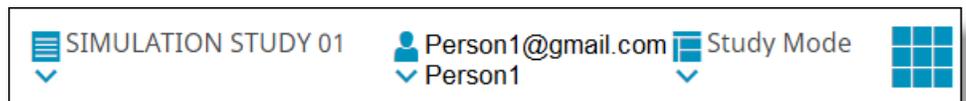


2. To access the Help section from the Dashboard, click the **Question**

**Mark** icon .

### ERT Global Account Information

The Title Bar is described in the ERT Global Account help.



## Widgets

**Widgets** may include the following:

- **Announcements**
- **Open DCRs**
- **Open Queries**
- **Visit Overview**
- **Study Metrics**
- **Enrollment Graph**

*Note: The Widgets that show on the Dashboard may differ depending on study type and the Portal user's access level.*

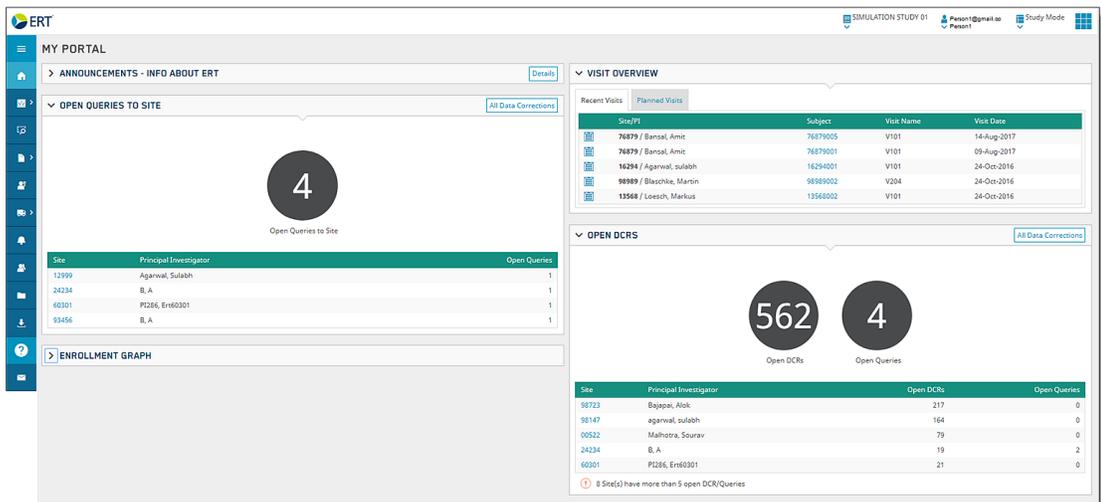
Click the **Open/Close** icon



to minimize an expanded widget window, and to expand a minimized widget.

Widgets may be minimized and maximized, as desired. See the example below for the view with all widgets minimized.

Click the **Details** button to display Widget details.



The screenshot shows the ERT MY PORTAL dashboard. The 'OPEN QUERIES TO SITE' widget displays a large number '4' and a table with the following data:

Site	Principal Investigator	Open Queries
12399	Agarwal, Sulabh	1
24234	B, A	1
60301	P1286, Er160301	1
93456	B, A	1

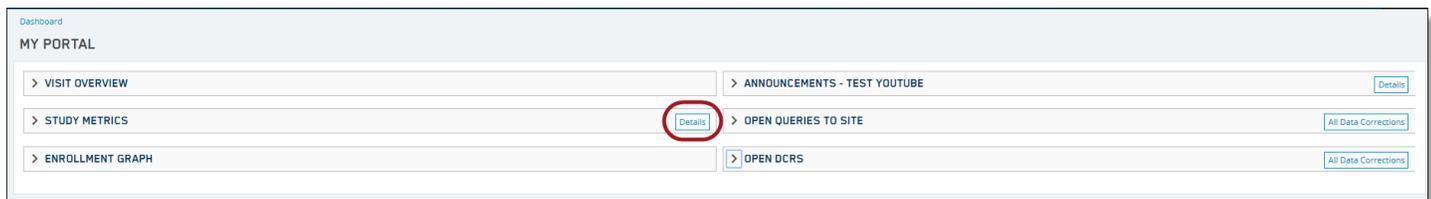
The 'VISIT OVERVIEW' widget shows a table of recent visits:

Site/PI	Subject	Visit Name	Visit Date
76879 / Bansal, Amit	76879005	V101	14-Aug-2017
76879 / Bansal, Amit	76879001	V101	09-Aug-2017
16294 / Agarwal, sulabh	16294001	V101	24-Oct-2016
98989 / Blaschke, Martin	98989002	V204	24-Oct-2016
13568 / Loesch, Markus	13568002	V101	24-Oct-2016

The 'OPEN DCRs' widget shows a large number '562' and a table with the following data:

Site	Principal Investigator	Open DCRs	Open Queries
98723	Bagpai, Alok	217	0
98147	agarwal, sulabh	164	0
00522	Malhotra, Sourav	79	0
24234	B, A	19	2
60301	P1286, Er160301	21	0

A notification at the bottom states: '8 Site(s) have more than 5 open DCR/Queries'.



The screenshot shows the ERT MY PORTAL dashboard with all widgets minimized. The 'Details' button for the 'STUDY METRICS' widget is circled in red.