

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**



ERT Global Account Information

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

🝃 ERT'							SIMULATION STUDY 01	Person1@gmail.co Person1	Study Mode
MY PORTAI	1								
ANNOUNC	EMENTS - INFO ABOUT ERT		Details	VISIT	DVERVIEW				
	RIES TO SITE		All Data Corrections	Recent Vis	its Planned Visits				
					Ste/PI	Subject	Visit Name	Visit Date	
P				(fi)	76879 / Bansal, Amit	76879005	V101	14-Aug-20	17
					76879 / Bansal, Amit	76879001	V101	09-Aug-20	17
				圃	16294 / Agarwal, sulabh	16294001	V101	24-Oct-20	6
19 C					98989 / Blaschke, Martin	98989002	V204	24-Oct-20	6
		4			13568 / Loesch, Markus	13568002	V101	24-Oct-20	6
•		Open Queries to Site		- OPEN	DCRS				All Data Corrections
3 17900	Anarural Sulabb		Open Quenes						
24234	B A								
60301	P1286, Ert60301		1			(FCD)			
93456	B, A		1			(562)	4)		
	ENT GRAPH					Open DCRs	Open Queries		
-				Site	Principal Investigator		Open DC	Rs	Open Queries
				98723	Bajapai, Alok		3	17	0
				98147	agarwal, sulabh		1	64	0
				00522	Malhotra, Sourav			79	0
				00522 24234	Malhotra, Sourav B, A			79 19	0
				00522 24234 60301	Malhotra, Sourav B, A P1286, Ert60301			79 19 21	0 2 0





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ERT Quick Guide

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.

					Ē	SIMULATION STUDY 01	Person1@gmail.co Person1	Study Mode
MY POR	TAL							
ANNO	JNCEMENTS - INFO ABOUT ERT		Details VI	SIT OVERVIEW				
🛛 💙 🗸 OPEN	QUERIES TO SITE		All Data Corrections Rece	ent Visits Planned Visits				
_				Site/PI	Subject	Visit Name	Visit Date	
~~				76879 / Bansal, Amit	76879005	V101	14-Aug-2017	
B >				76879 / Bansal, Amit	76879001	V101	09-Aug-2017	
			a	16294 / Agarwal, sulabh	16294001	V101	24-Oct-2016	
				98989 / Blaschke, Martin	98989002	V204	24-Oct-2016	
				13568 / Loesch, Markus	13568002	V101	24-Oct-2016	
		Open Queries to Site	~ 01	PEN DCRS				All Data Correct
Site	Principal Investigator		Open Queries					
12999	Agarwal, Sulabh		1					
24234	B, A		1					
	P1286. Ert60301		1			4		
60301			1		56/	4		
60301 93456	B, A				JUZ (
€0301 93456	8, A							
€0301 93456 € ► ENRO	8, A				Open DCRs	Open Queries		
€0301 93456 2 > ENRO	B,A			Principal Investigator	Open DCRs	Open Queries	Rs	Open Que
€0301 93455 > ENRO	B.A			Principal Investigator 13 Bajapai, Alok	Open DCRs	Open Queries Open DC	R3 17	Open Que
€0301 93456 > ENRO	8.A			Principal Investigator 13 Bajapai, Alok 17 agarwal, sulabh	Open DCRs	Open Queries Open DCI 2 1	Rs 17 64	Open Que
€0301 93455 > ENRO	8,4			Principal Investigator 13 Bajapa, Alok 17 agarwal, sulabh 12 Mahbera, Sourav	Open DCRs	Open Queries Open DCI 2 11	Rs 17 64 79	Open Que
€0301 93456 >ENRO	8,4		500 977 914 052 242	Principal Investigator 13 Bajapal, Alok 17 agarwal, subah 12 Malhora, Sobrav 14 B, A	Open DCRs	Open Queries	Rs 17 64 79 19	Open Que
€0301 93456 > ENRO	8,A		200 900 910 910 910 910 910 910 910 910 9	Principal Investigator 3 Bojapal, Alok 9 garvas, sulabh 2 Mahotra, Sourav 4 B, A 1 P1245, Eric001	Open DCRs	Open Queries Open DCI 2 11	Rs 17 64 79 19 21	Open

Dashboard MY PORTAL			
> VISIT OVERVIEW		> ANNOUNCEMENTS - TEST YOUTUBE	Details
> STUDY METRICS	Details	> OPEN QUERIES TO SITE	All Data Corrections
> ENROLLMENT GRAPH		> DPEN DCRS	All Data Corrections

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