

- APPLICABLE TO:
- ☒ Company Admin

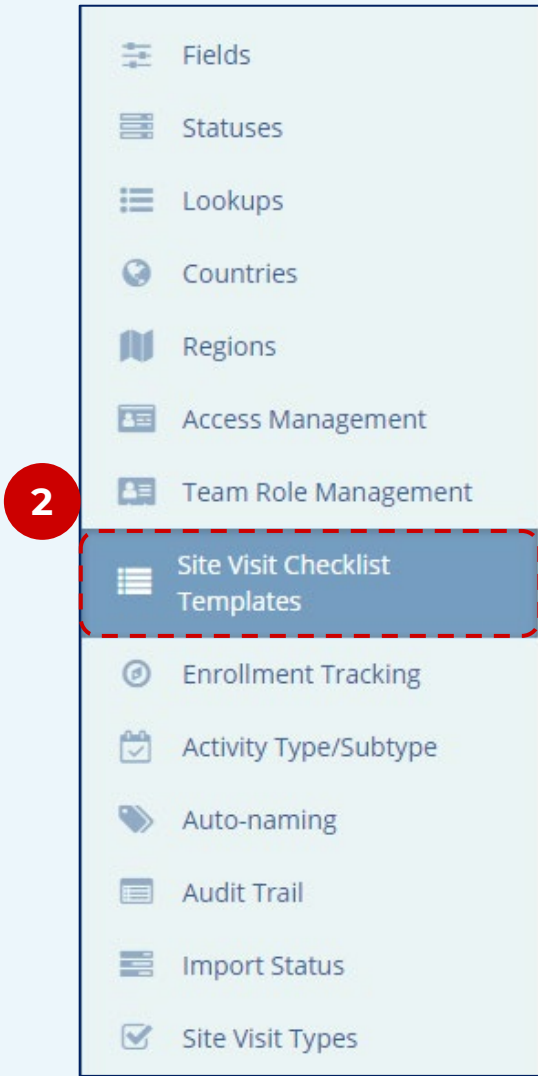
☐ Study Manager

☐ CRA

- 1

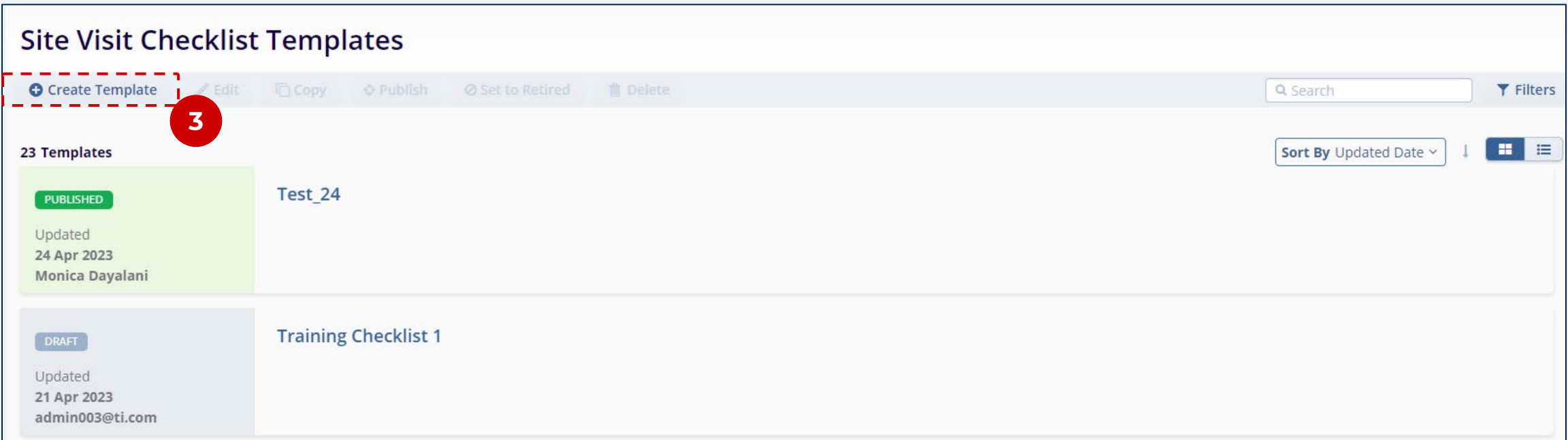
Navigate to the Settings area.
- 2

Select 'Site Visit Checklist Templates' from the navigation links at the left side of the screen.



- 3

Press the **Create Template** button above the grid.



4 Name the Checklist Template and, if desired, add a description.

5 Press **Create**.

Create Site Visit Checklist Template

Site Visit Checklist Template Name*

Description

Cancel

Create

6 Select the new checklist and press **Edit** at the top of the screen.

Site Visit Checklist Templates

+ Create Template

Edit

Copy

Publish

Set to Retired

24 Templates 1 Selected

DRAFT

Updated
24 Apr 2023
admin003@ti.com

Training Demo Checklist

Description of the Checklist

7 If desired, turn on the Template Numbering via the toggle switch and select the schema.

← Training Demo Checklist

DRAFT Publish

Save Copy Delete


Site Visit Checklist Template Name*

Training Demo Checklist


Description


Description of the Checklist

7


Template Numbering 


Section Order

Numerical 

 Configure Preview 1, 2... N

Question Order

Numerical 

 Configure Preview 1, 2... N

8

+ Add Section

8 Press **Add Section** and name the section.

9 Press **Add Question** to begin adding questions

▲ New Section

Section Title*

Description

Section Numbering 

Question Order

9

+ Add Question

10 Choose the type of question that you would like to add. This selection will determine the steps required to complete configuring the question.

Question 1

Required Question ☐ Duplicate Delete

Question*

Description for the Question ☐

Options

☐ Yes

☐ No

☐ N/A

Add User Comment Field

Type of Question*

Yes, No, N/A

Yes, No, N/A

Text (Line)

Text (Paragraph)

One Answer from the List

Few Answers from the List

Dropdown List

Buttonize Answers

Date

Scale

Add Question

11 Press **Save** whenever you would like to save your progress and when you are done editing the checklist template.

11

Save Copy Delete

Site Visit Checklist Template Name*

Training Demo Checklist

Description

Description of the Checklist

Template Numbering ☒

Section Order

Numerical

Question Order

Numerical