

How to Assign Contacts to Sites

TI version 10.8

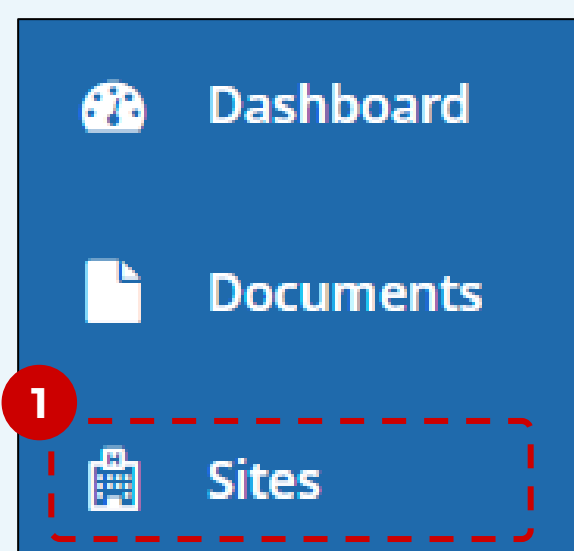
APPLICABLE TO:

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

In TI eTMF and eISF rooms, Contacts are managed through the Sites page. This can be used both to create new Contacts, and to assign contacts to their respective Sites and roles.

While in most cases Contacts and their details are imported en-masse from sources like lists or CTMS, it remains possible to manually manage Contacts one-by-one. This Job Aid describes how.

1 Enter a room and open the **Sites** module in the eTMF or Collaborative Workspace context.

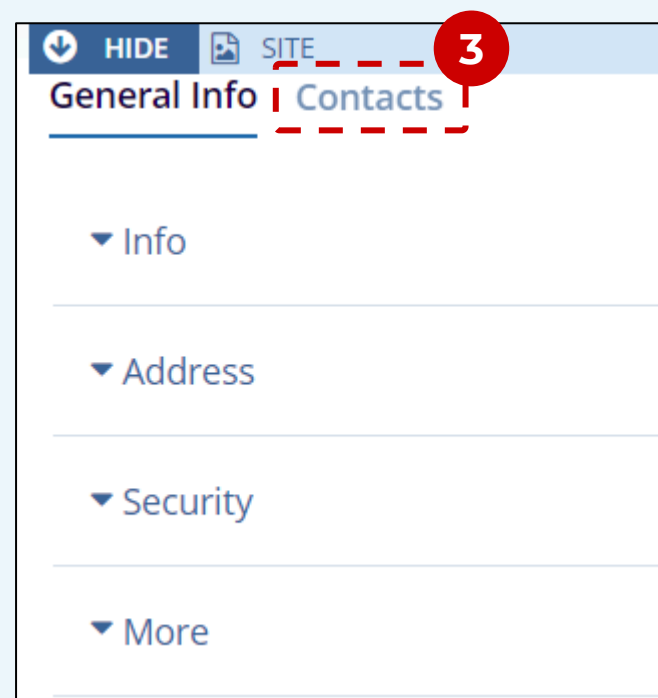


2 Select **one** Site.

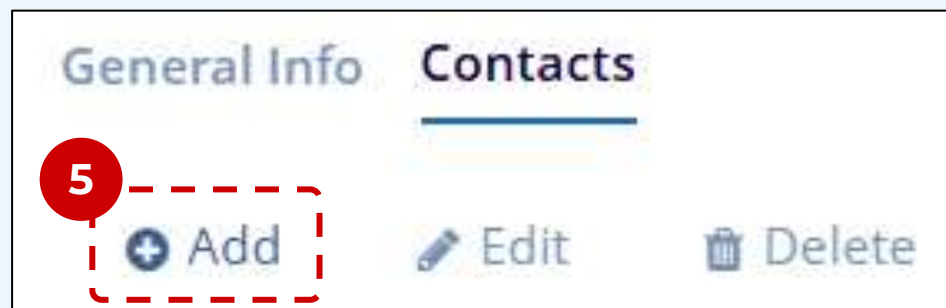
A screenshot of a table showing site selection. The table has four columns: a selection column with checkboxes, a star column, a name column, and a status column. The second row is selected, indicated by a red dashed box and a red circle with the number '2'. The table shows 1 - 2 of 2 items, with 1 selected.

<input type="checkbox"/>		Institutio...	Site Status
<input type="checkbox"/>	...	Toronto H...	ACTIVE
<input checked="" type="checkbox"/>	...	Woodridg...	ACTIVE

3 Expand the Site pane at the bottom of your screen. Switch to the **Contacts** tab.

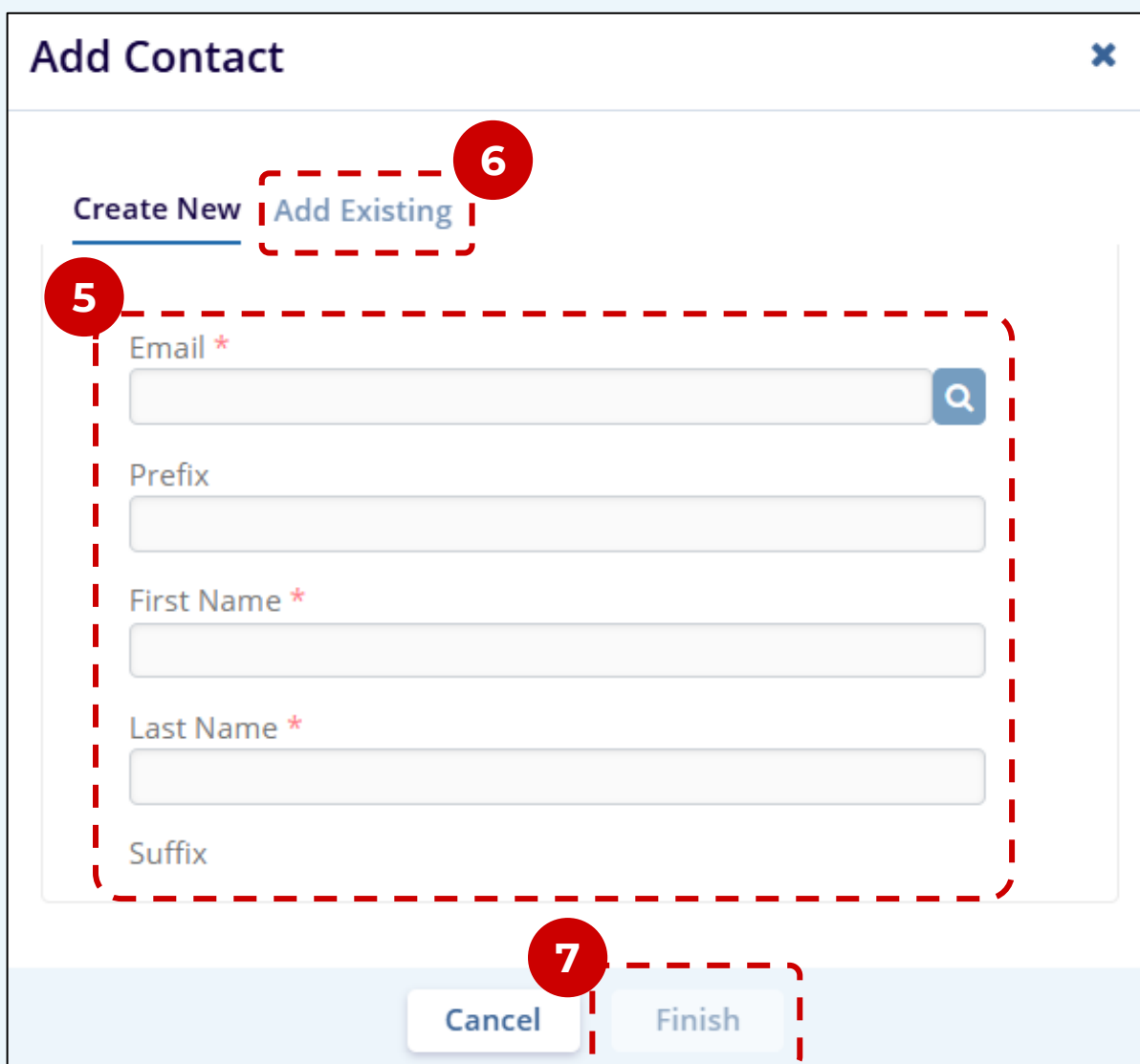


4 Click on the **Add** button.



5 **Fill** all required details for a new contact.

6 Alternatively, you can select from the pool of existing contacts with **Add Existing**.



7 Click **Finish** to create/finalize.

8 Contacts should be associated with a job function (**Contact Type**).

9 Click **Save**.

