

# How to Mark a Site as Closed

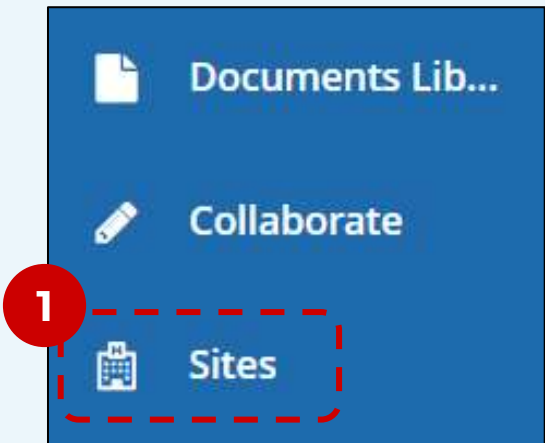
TI version 10.8

## APPLICABLE TO:

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

As sites conclude their activity for a specific trial or company, the related ‘Site’ entities in TI need updating. Depending on room configuration, this may require a manual process. This Job Aid guides users in performing that process.

**1** Using the navigation column, enter the **Sites** area.

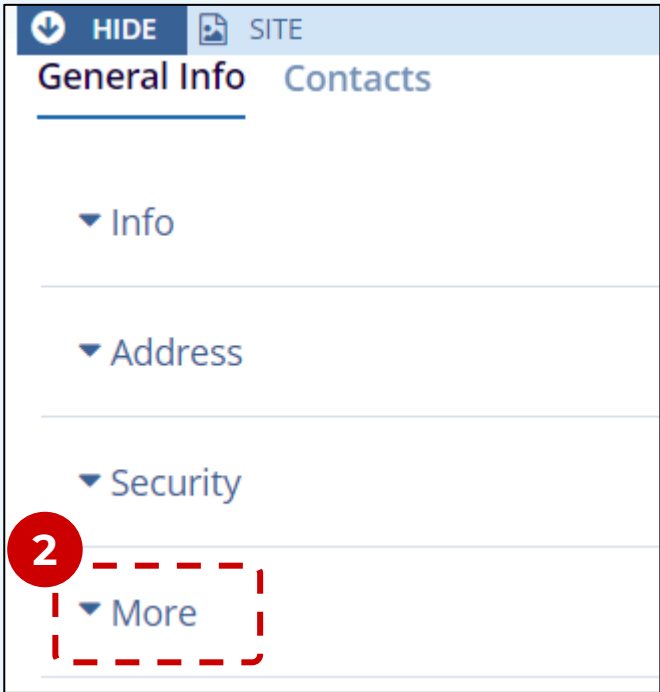


**2** Select **one** Site.

1 - 2 of 2 (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.  
Scroll to and click on the **More** section.



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**4** Extend the Status dropdown, and select **Closed**.



If this dropdown is not selectable, the room is likely integrated with offerings that auto-manage site statuses (like CTMS or SSU).

The screenshot shows the 'More' dropdown menu with the 'Status' dropdown extended. The 'Status' dropdown is currently set to 'ACTIVE'. The extended menu shows the following options: 'PENDING', 'ACTIVE', 'NON PARTICIPATING', 'REJECTED', 'MAINTENANCE', and 'CLOSED'. The 'CLOSED' option is highlighted with a red dashed box and a red circle with the number 4.

**5** Scroll to and enter the **Effective Closure Date**.

The screenshot shows the 'Effective Closure Date' field with a red dashed box and a red circle with the number 5. The field contains the text '12 MM yyyy'.

**6** Save your changes. Button is located at bottom of the Site pane.

The screenshot shows the 'Save' and 'Save & Next' buttons. The 'Save' button is highlighted with a red dashed box and a red circle with the number 6.

**7** The site is now listed in the **Closed** category.

The screenshot shows a list of site categories: 'All', 'Active 19', and 'Closed 1'. The 'Closed 1' category is highlighted with a red dashed box and a red circle with the number 7.