

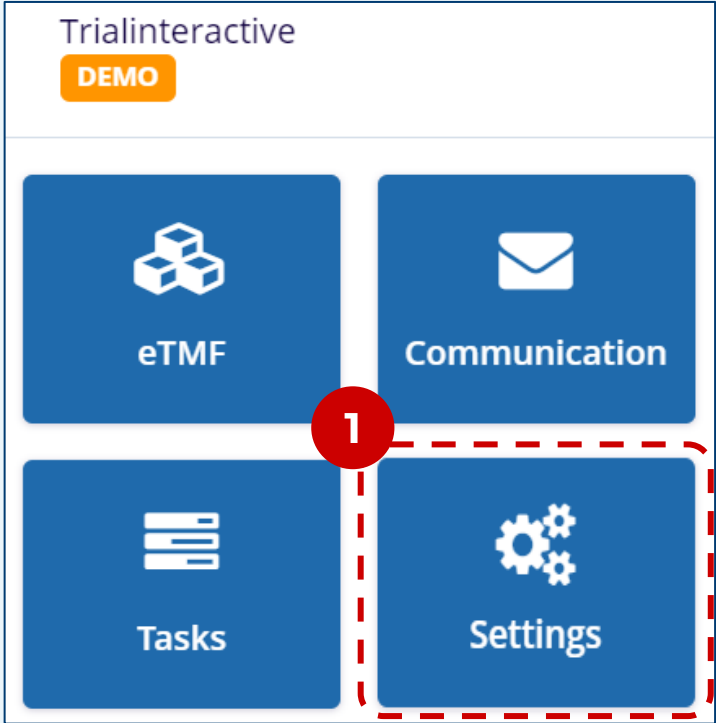
APPLICABLE TO:

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

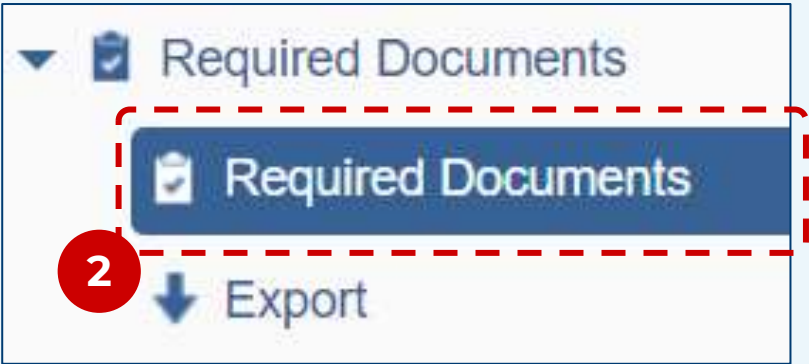
TI's eTMF rooms support configuration of Required (or expected) Documents both as a static list or through Events generating new lists as they occur.

This Job Aid accompanies the user through the setup needed to add any Document Type so that the room can generate Required Document placeholder of the selected Type.

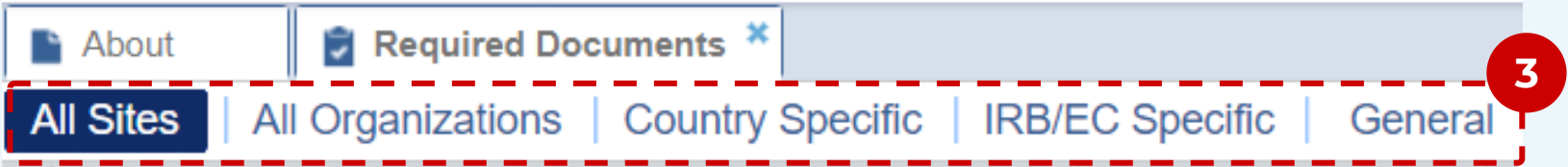
1 Log in to a room and enter the **Settings** area.



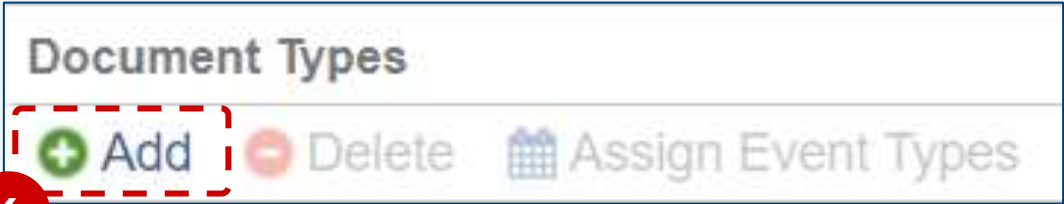
2 Open the **Required Documents** submenu.



3 Choose to what **level of entity** the required document will be applicable.



4 In the Document Types side panel, click **Add**.



5 **Type** into the searchbox or **expand folders** to select the desired document type(s).

Documents to be submitted by all the sites

5a

Search

▼ All Document Types

5b

Investigative Site

01 Trial Management

02 Central Trial Documents

03 Regulatory

6 Configure the **additional options**. These may vary based on previous selection and room build.

6

Required For:

☒ eTMF

To be submitted by:

Event Driven

☐ Event Driven

Languages:

 It is advisable to receive Event Management training before making changes here.

7 Click **Save & Close** to finalize.

7

Save

Save & Close

8 The Document Types panel allows you to review preferences and status. You may want to *Assign* a doctype to events (see Event creation materials and training).

Document Types					
<div><div>+ Add</div><div>- Delete</div><div>Assign Event Types</div><div>Document Type Profile</div></div>					
<input type="checkbox"/>	Documen...	Category	Languages	Contact	Required
<input type="checkbox"/>	<div><div>!</div>Filenote M...</div>	Investigati...	English	Principal I...	eTMF
<input checked="" type="checkbox"/>	Form FDA...	Investigati...	(Not Set)	Principal I...	eTMF