

How to Setup Document Auto-Naming

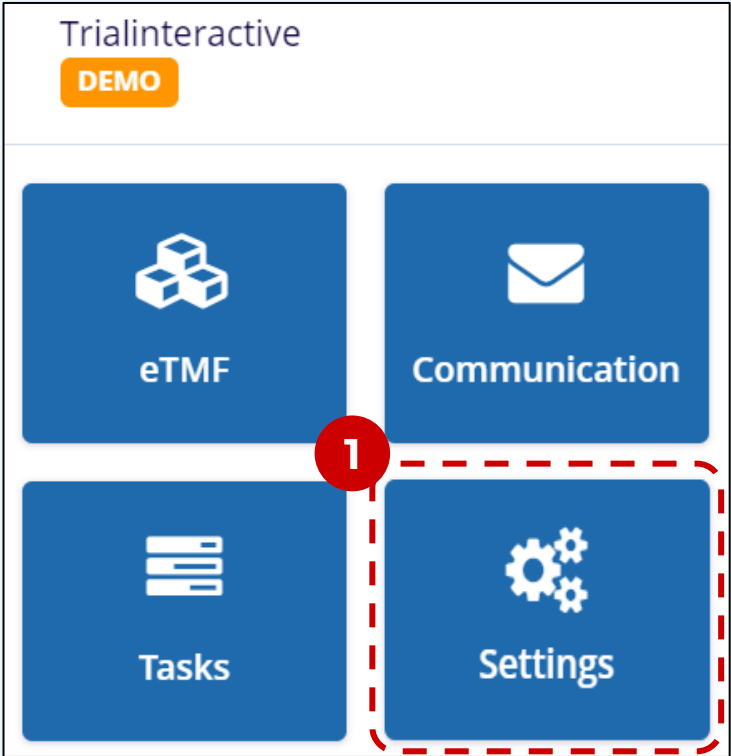
TI version 10.8

APPLICABLE TO:

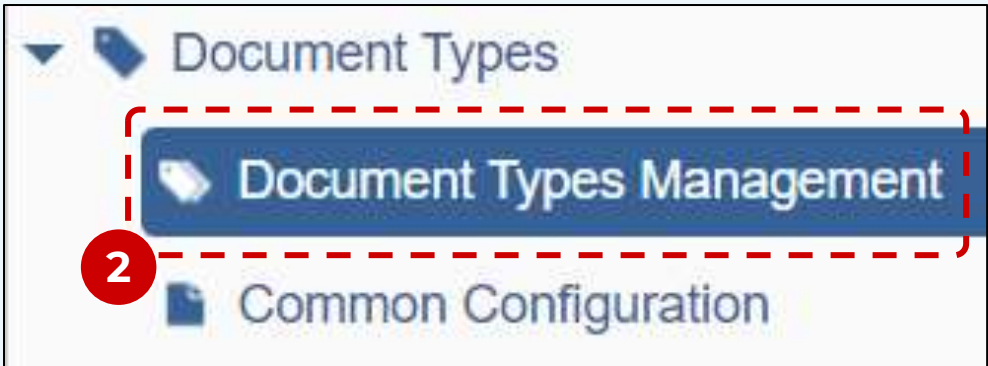
- ☒ Admin
- ☐ Manager
- ☐ Editor
- ☐ Reader
- ☒ eTMF
- ☒ Collaborate

Although name generation rules are usually set up before go-live, it is still possible for Admins to edit the rules to account for any changes which may be required.

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



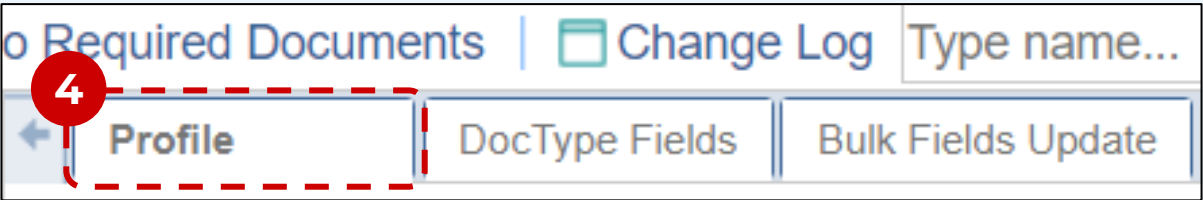
2 Open the **Document Types Management** submenu.



3 Select a **document type** to be configured for auto-naming.



4 In the side panel, access the **Profile** tab.



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- 5 Locate the **Auto Name Rules** field, and click the Wrench button.

Auto Name Rules:

\$\$\$RP.ProtocolNumber\$\$\$DT.DocumentTypeShort
Name\$\$\$DP.VersionNumber\$\$@GetDate(YYYY
MMDD,\$\$DP.Document Date\$\$)

5

- 6 Use the Available Template panel to identify fields you want in your rule. **Double-click** on an entry to add it.


Available Templates:

HardcodedFunctionsField Insertions

Description	Insertion
PrincipallInvestigatorFirstName	##PrincipallInvestigatorFirstName##
PrincipallInvestigatorLastName	##PrincipallInvestigatorLastName##
SponsorName	##SponsorName##
ContactFirstName	##ContactFirstName##
ContactLastName	##ContactLastName##

Insertion Description

PrincipallInvestigatorLastName
Previewed as: Smith

6

- 7 Review the **Rule Editor** and **Preview** to check that the rule will work as you intend.

Rule Editor:

\$\$\$RP.ProtocolNumber\$\$\$DT.DocumentTypeShortName\$\$\$DP.VersionNumber\$\$@GetDate(YYY
YMMDD,\$\$DP.Document Date\$\$)##SponsorName##

Preview:

Test Protocol Number_Test Short Name_Test Version Number_20241021_10Farma Inc.

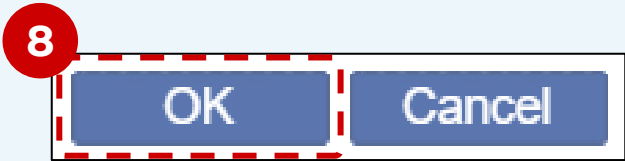
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8 Click **OK** to exit the rule configuration window.



9 In the settings side panel, click **Save** to confirm the changes, or **Cancel** to discard.

