

- APPLICABLE TO:
- ☒ Admin

☒ Manager

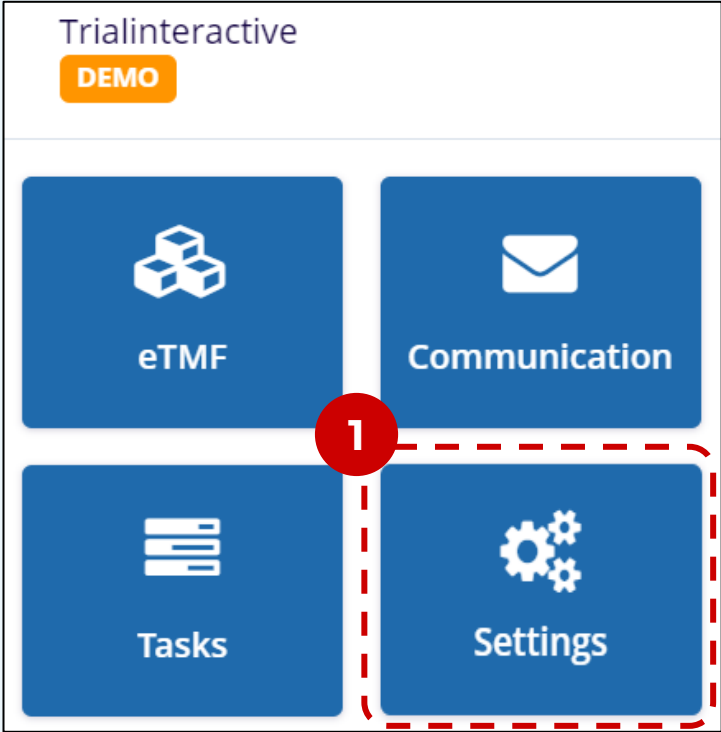
☐ Editor

☐ Reader

☒ eTMF

☐ Collaborate

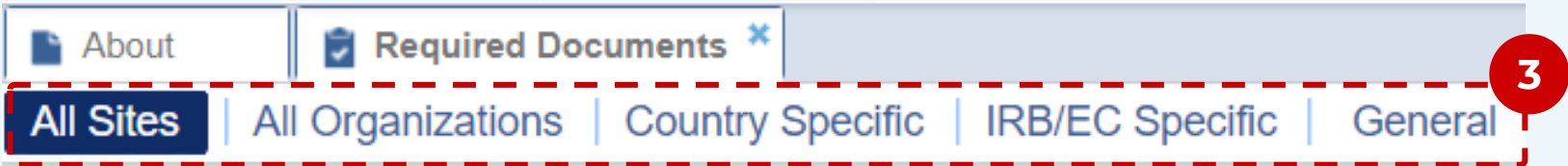
1 Log in to a room and enter the **Settings** area.



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"/>	Filenote M...	Investigati...	English	Principal I...	eTMF
<input checked="" type="checkbox"/>	Form FDA...	Investigati...	(Not Set)	Principal I...	eTMF