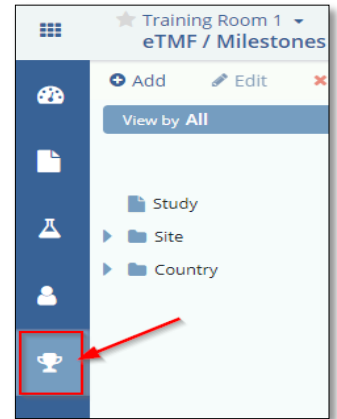Applicable to: ☑ Administrators   ☑ Editors   ☐ Readers
☑ eTMF   ☐ Study Start-up

1. Enter the study room and click the **Milestone** module.

(Contact your room Administrator if it is not available. Milestones must be configured under Settings *before* these steps can be performed)

2. Click the **Add** button to add a Milestone. The milestones available in the drop down menu were previously added by the room admins.

Fill out all the fields and Click **Create.**

Click **Add Another** button to create another Milestone.
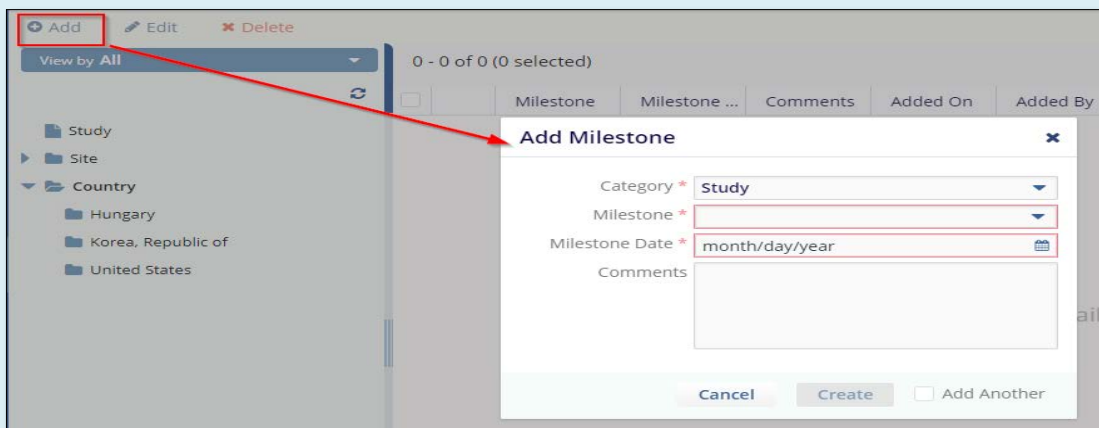
The milestone now appears in the grid.

Select the record and click **Edit** to make changes as necessary.

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5. Select the milestone and click **Assign documents** to associate the applicable documents with the milestone.

⊕ Assign Documents

6. Choose from the available documents. Drag to the right pane or double-click the document to assign it to the milestone.
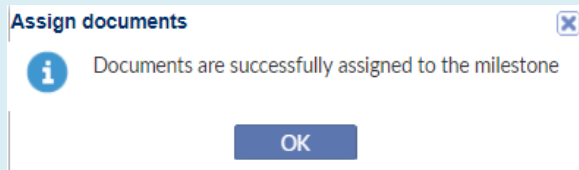
If no documents are available, contact your room Admin to add the applicable documents to the milestone settings.

See related job aid **How to Setup Milestones**

| Assign selected documents | Cancel |

7. Click **Assign selected documents**

8. Click **OK**

Assign documents

ℹ Documents are successfully assigned to the milestone

OK

Milestones now appear with a subscript number indicating the total of assigned documents

☐	Milestone	Milestone Date ▲
☐ ⊞ 🗂1	Amendment 1	01 Sep 2017

All ▼
All
Documents missing
Documents received
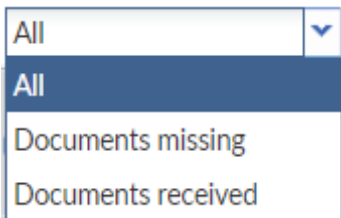
Select a filter to display history

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For any additional assistance, click … ❓ Help 📖 Guide