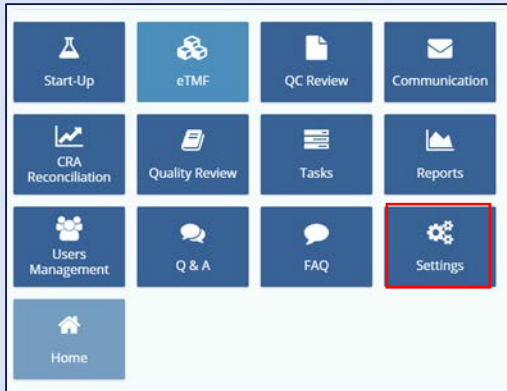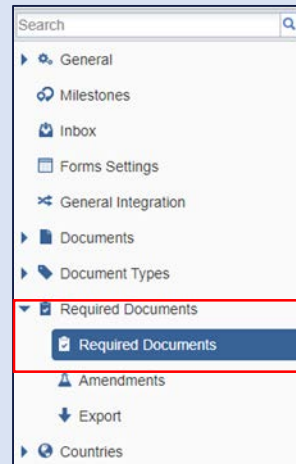**TRIAL INTERACTIVE**

APPLICABLE TO:

- ● Administrators
- ○ Editors
- ○ Readers
- ● eTMF
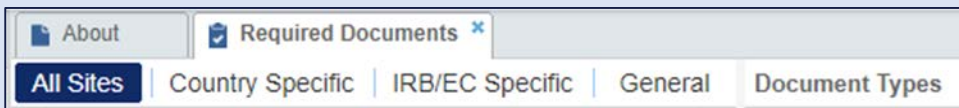- ● Study Start-Up
- ○ myTI

1. Go to the **Settings** menu in the Navigation Grid.

2. Expand the **Required Documents** menu and the choose **Required Documents** sub-menu.

3. Choose which category of document in order to add to, or edit, the list of Required Documents.
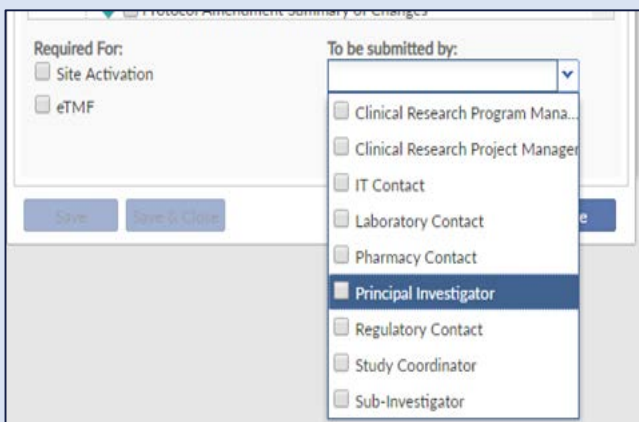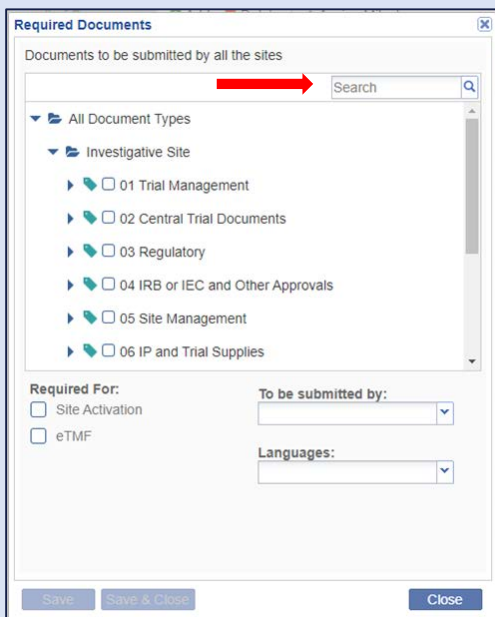

4. Click **Add**

TRIAL INTERACTIVE

5. Select the document type by drilling down in the folder structure and checking the box.

💡 Expand the folders to view document types.

💡 Use the **search** box to find a document type.

6. Select from the **Required For** options: eTMF and/or Site Activation

💡 At least one must be selected before saving.

Required Documents

Documents to be submitted by all the sites

Search

- ▼ 📁 All Document Types
  - ▼ 📁 Investigative Site
    - ▶ 🏷☐ 01 Trial Management
    - ▶ 🏷☐ 02 Central Trial Documents
    - ▶ 🏷☐ 03 Regulatory
    - ▶ 🏷☐ 04 IRB or IEC and Other Approvals
    - ▶ 🏷☐ 05 Site Management
    - ▶ 🏷☐ 06 IP and Trial Supplies

Required For:
☐ Site Activation
☐ eTMF

To be submitted by:

Languages:

Save   Save & Close   Close

7. If necessary, open the **To be submitted by** drop-down menu and select a contact type.

Required For:
☐ Site Activation
☐ eTMF

To be submitted by:

- ☐ Clinical Research Program Mana...
- ☐ Clinical Research Project Manager
- ☐ IT Contact
- ☐ Laboratory Contact
- ☐ Pharmacy Contact
- ☐ Principal Investigator
- ☐ Regulatory Contact
- ☐ Study Coordinator
- ☐ Sub-Investigator

Save   Save & Close

📝 **To be submitted by** is optional, unless **contact type** is a required metadata field for the document type.

8. Click **Save** (to add another document type) or **Save & Close**

Save   Save & Close
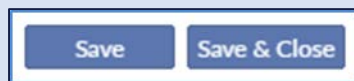
📝 The document type will now be included in the eTMF Health dashlet and eTMF completeness reports

TRANSPERFECT