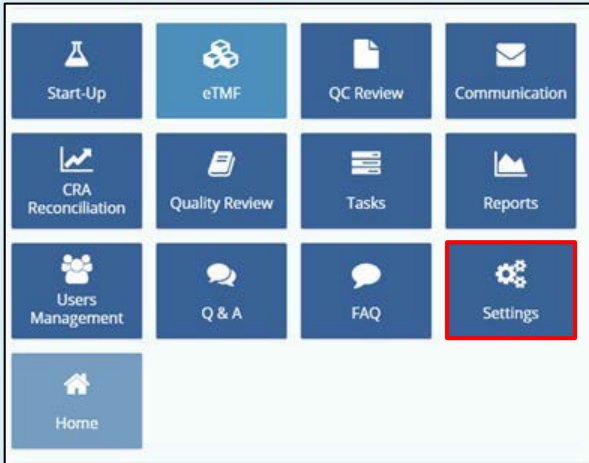
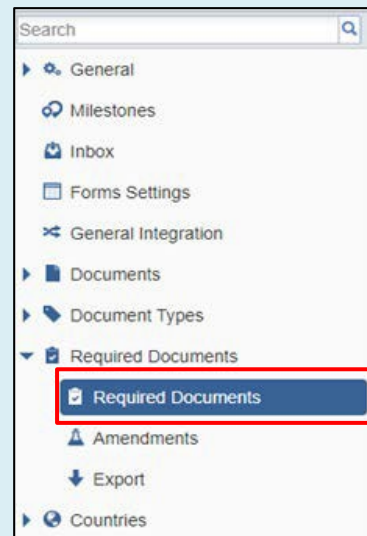


APPLICABLE TO:

- Administrators
- eTMF
- Room Managers
- Editors
- Study Start-Up
- Readers
- myTI

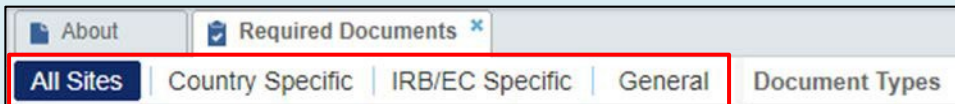


1. Go to the **Settings** menu in the Navigation Grid.

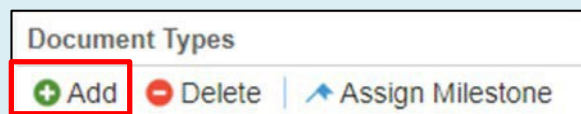


2. Expand the **Required Documents** menu and choose the **Required Documents** sub-menu.


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




4. In the **Document Types** panel to the right, click **Add**

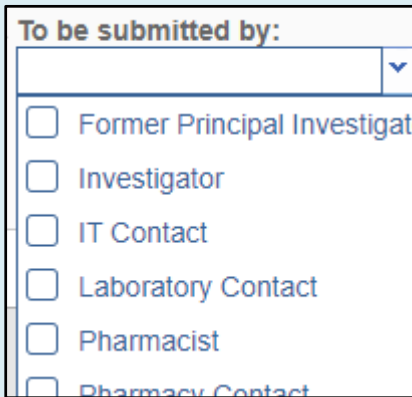


5. Select the document type by drilling down in the folder structure and checking the appropriate box


 Expand folders to view document types. You can use the **Search** box to find a document type.

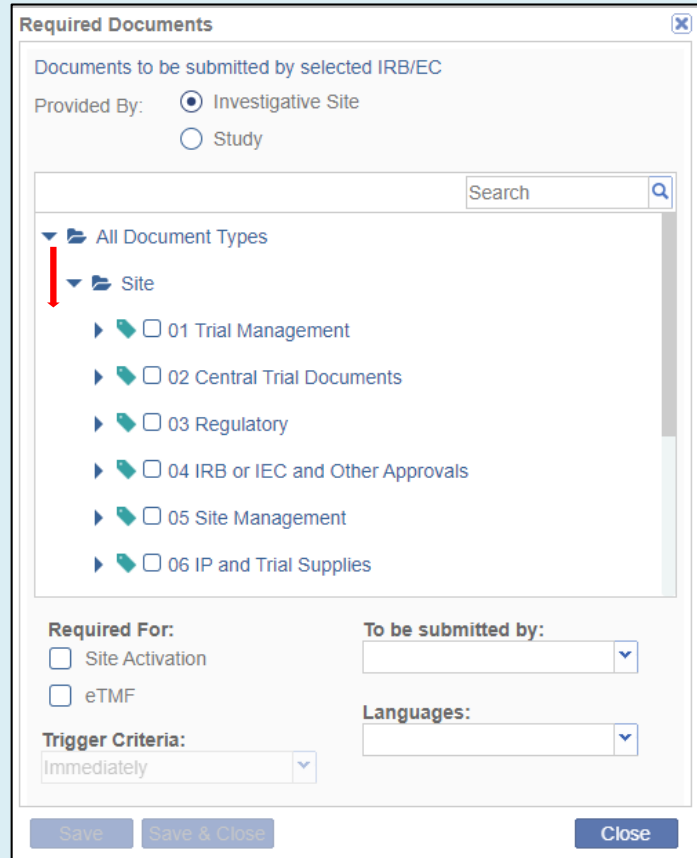
6. Select from the **Required For** options: eTMF and/or Site Activation

 At least one must be selected before saving.




8. Click **Save** (to continue adding document types) or **Save & Close**.

 The document type will now be included in the **eTMF Health** dashlet and eTMF completeness reports.



7. Choose who will be submitting the document, using the **To be submitted by** drop-down menu

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

