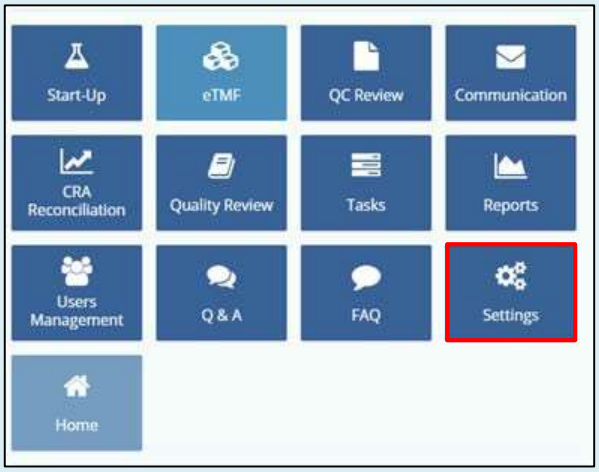
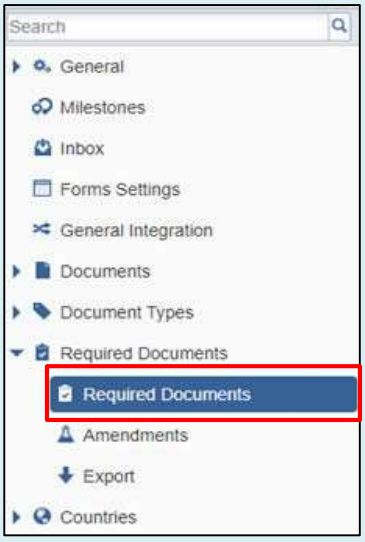
APPLICABLE TO:

- (●) Administrators
- (●) Room Managers
- ( ) Editors
- ( ) Readers
- (●) eTMF
- (●) Study Start-Up
- ( ) myTI

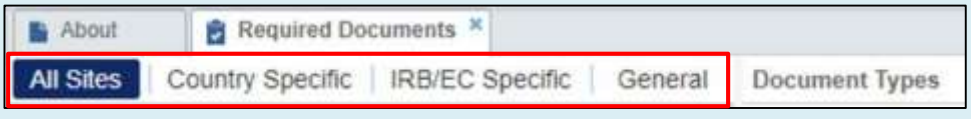


1. Go to the **Settings** menu in the Navigation Grid.



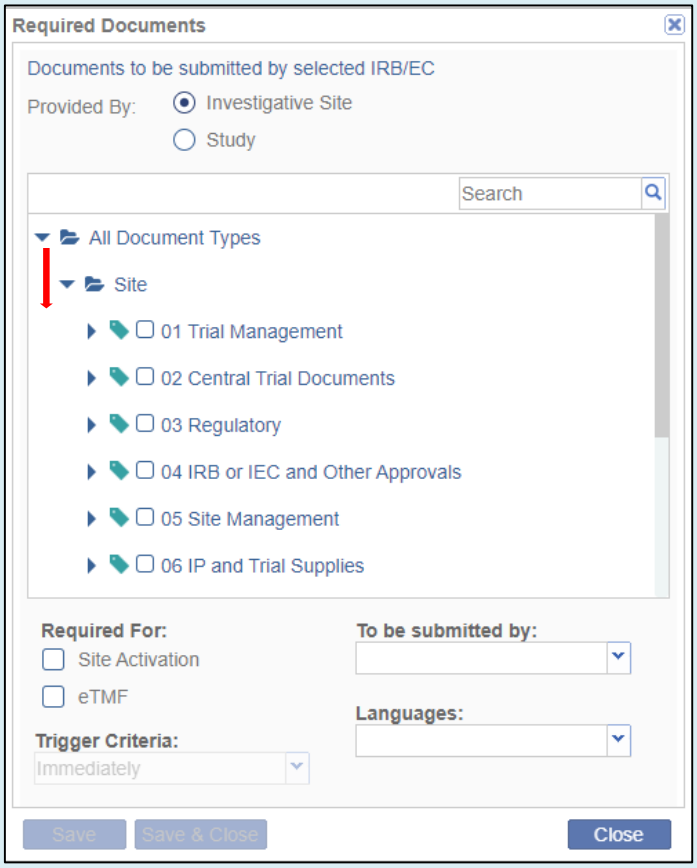
2. Expand the **Required Documents** menu and choose the **Required Documents** sub-menu.

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.

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.

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.