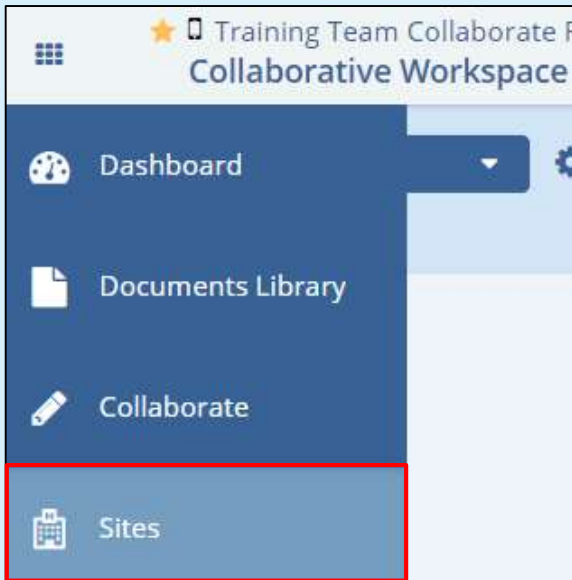


APPLICABLE TO:

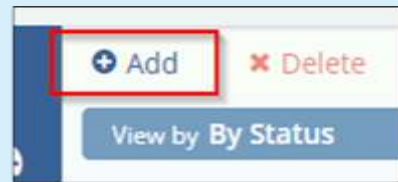
- Administrators
- Room Managers
- Editors
- Readers

- Collaborate
- eISF



1. In Collaborative Workspace, select the Sites module.

2. Click **Add** above the grid.

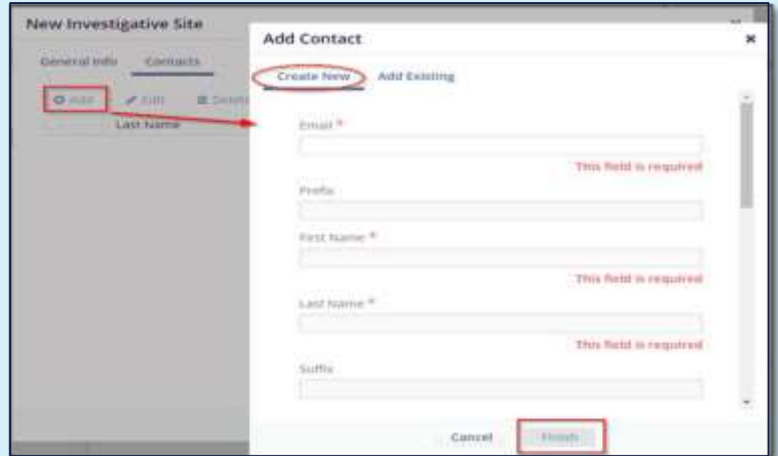


3. Complete the required fields for the **New Investigative Site**.

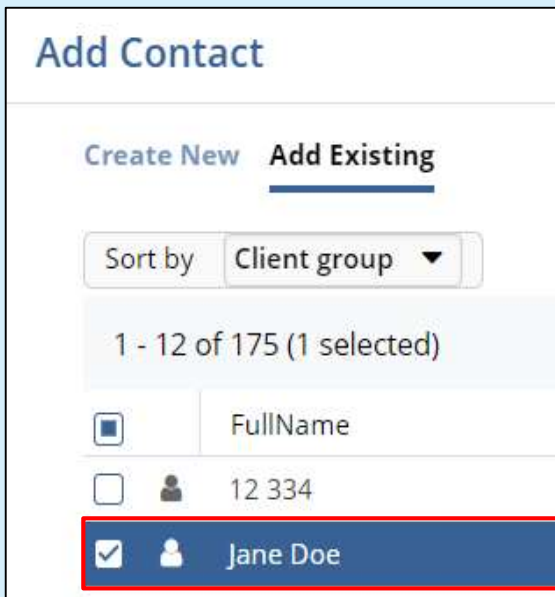
A screenshot of the 'New Investigative Site' form. The form has two tabs: 'General Info' and 'Contacts'. Under 'General Info', there are several input fields: 'Institution Name *', 'CRA', 'Start-Up Specialist', 'Site Number', 'Site', a checkbox for 'Disable auto Site name', 'Reason for not using auto Site name *', and 'IRBEC Name *'. At the bottom of the form are 'Cancel' and 'Add' buttons.

Site information fields can be added or modified later.

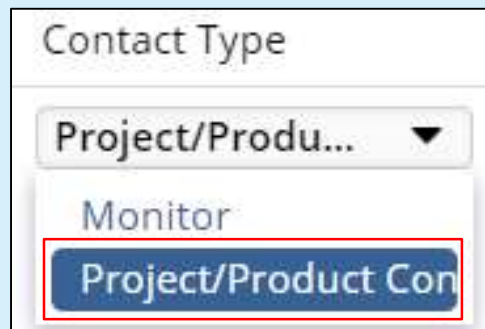
4. A Principal Investigator must be added to create the site. Click **Add** in the **Contacts** dashlet and choose **Create New** or **Add Existing**.



If creating a new contact, complete all required fields. Check **Provide Documents** if essential documents have been assigned to this Contact type. Click **Finish** when done.



5. Click **Add Existing** to add an existing contact. The first contact in a Site needs to be designated as **Principal** or equivalent (based on configuration).



See related job aid: How to Assign Contacts to Sites.

6. Now that a contact is present, you can create the site by clicking **Add** at the bottom of the panel.



7. The site will appear in the grid, with a status of **Pending**.

<input type="checkbox"/>			Institution Name
<input type="checkbox"/>	...	★	Medical Institute