How to Assign Contacts to Sites

TI version 10.6

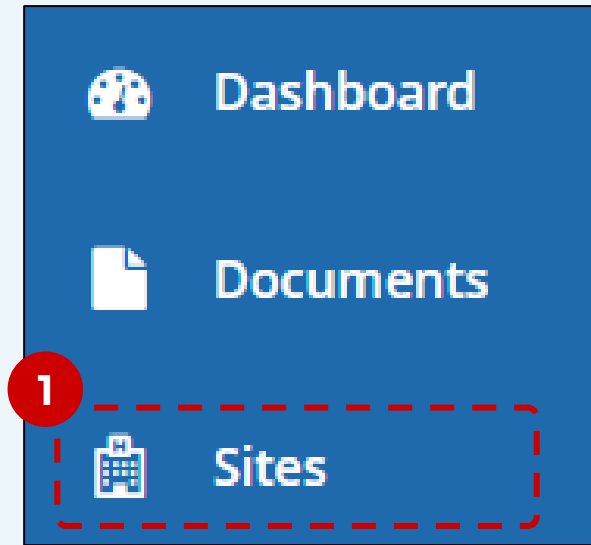**TRIAL INTERACTIVE**

APPLICABLE TO:

- ● Admin
- ● Manager
- ● Editor
- ○ Reader

- ● eTMF
- ● eISF

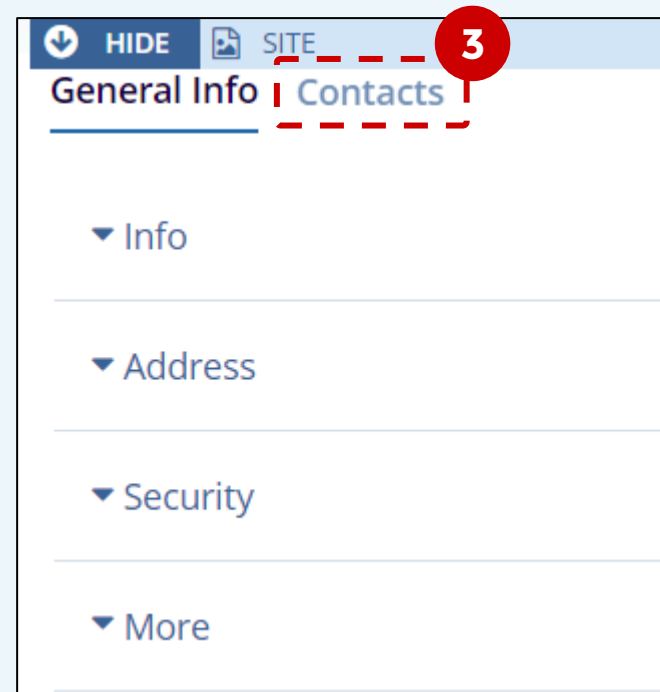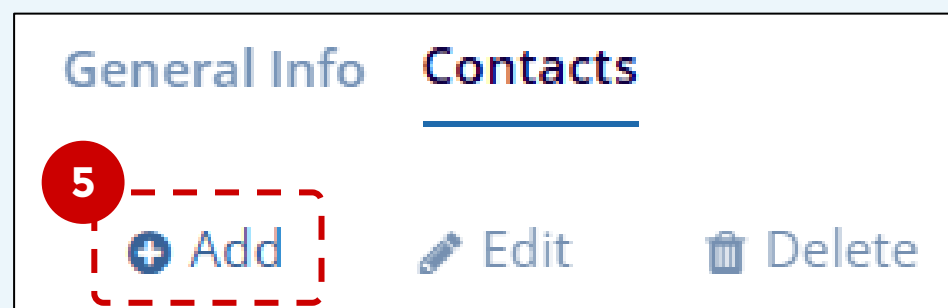**1** Enter a room and open the **Sites** module in the eTMF or Collaborative Workspace context.

2 Select **one** Site.

3 Expand the Site pane at the bottom of your screen.
Switch to the **Contacts** tab.

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4 Click on the **Add** button.
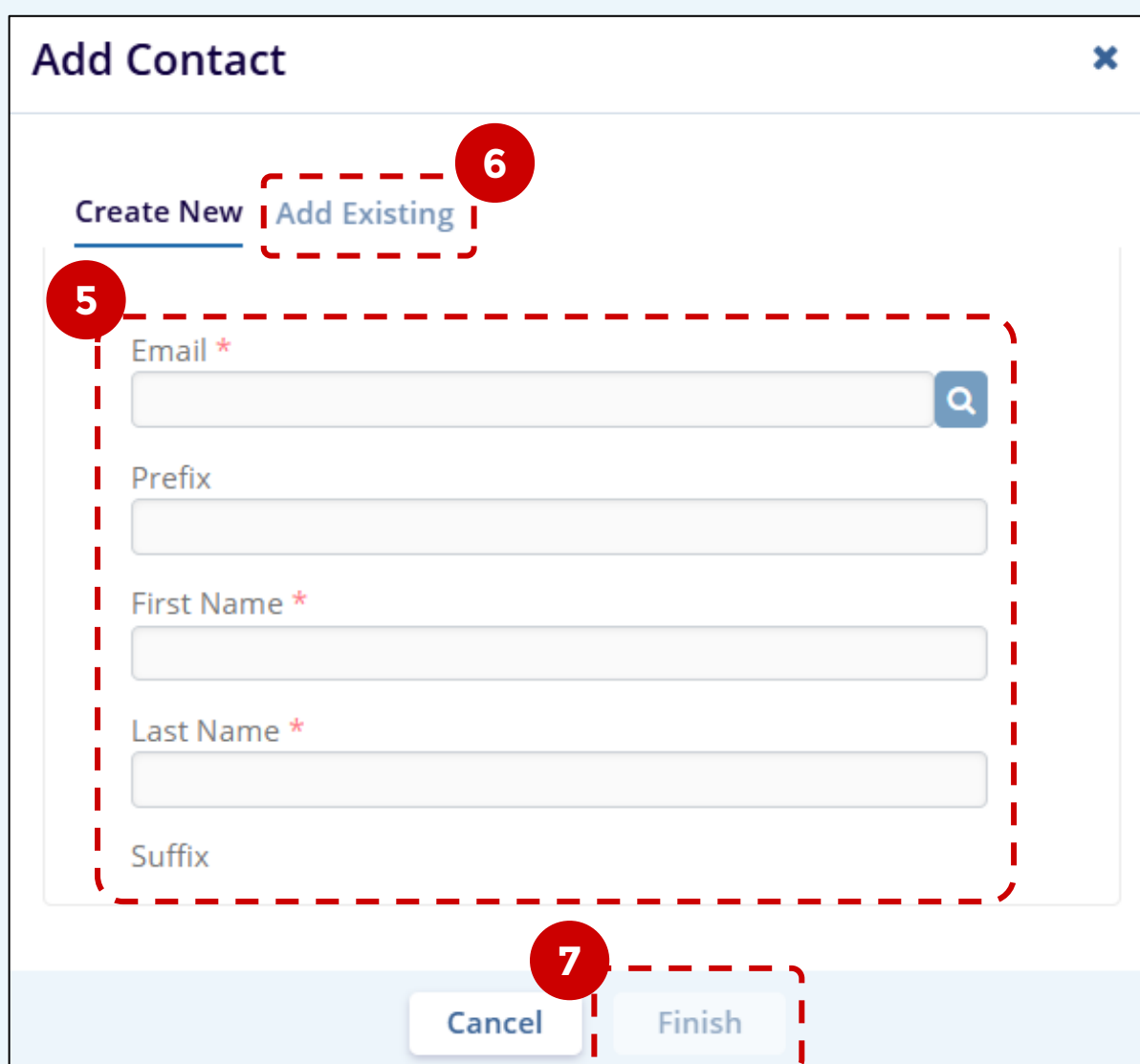
General Info **Contacts**

5
⊕ Add   ✏ Edit   🗑 Delete

5 **Fill** all required details for a new contact.

6 Alternatively, you can select from the pool of existing contacts with **Add Existing**.

Add Contact   ✖

6
Create New   Add Existing

5
Email *
[🔍]

Prefix
[   ]

First Name *
[   ]

Last Name *
[   ]

Suffix

7 Click **Finish** to create/finalize.

7
Cancel   Finish

8 Contacts should be associated with a job function (**Contact Type**).

		Last Name	First Name	Email	Contact Type
☐					
☐	👤	Parik	Olive	drolive████████	Principal Inve ▼
☐	👤	Coord	Lab	███████.com	▼

8

9 Click **Save.**

Cancel   Save   Save & Next

9