How to Setup Document Auto-Naming

TI version 10.6

TRIAL INTERACTIVE
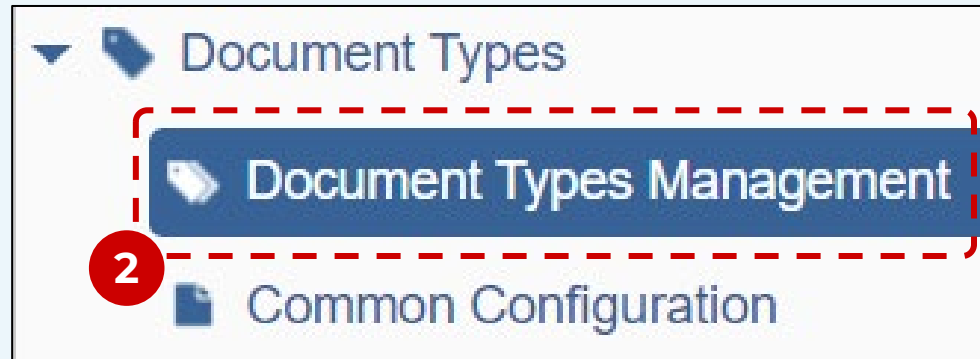
APPLICABLE TO:

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

- ● eTMF
- ● Collaborate

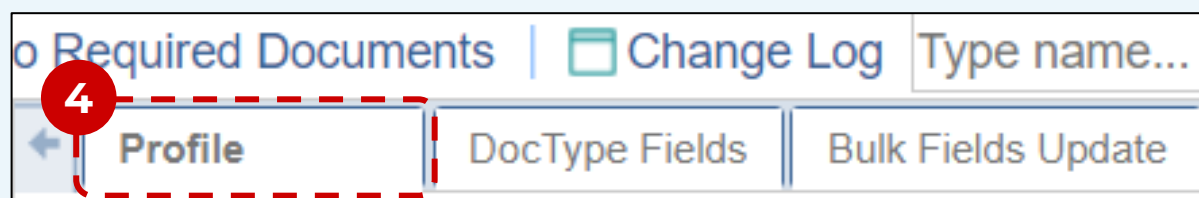**1** Log in to a room and enter the **Settings** area.

Trialinteractive
DEMO

eTMF | Communication
Tasks | Settings
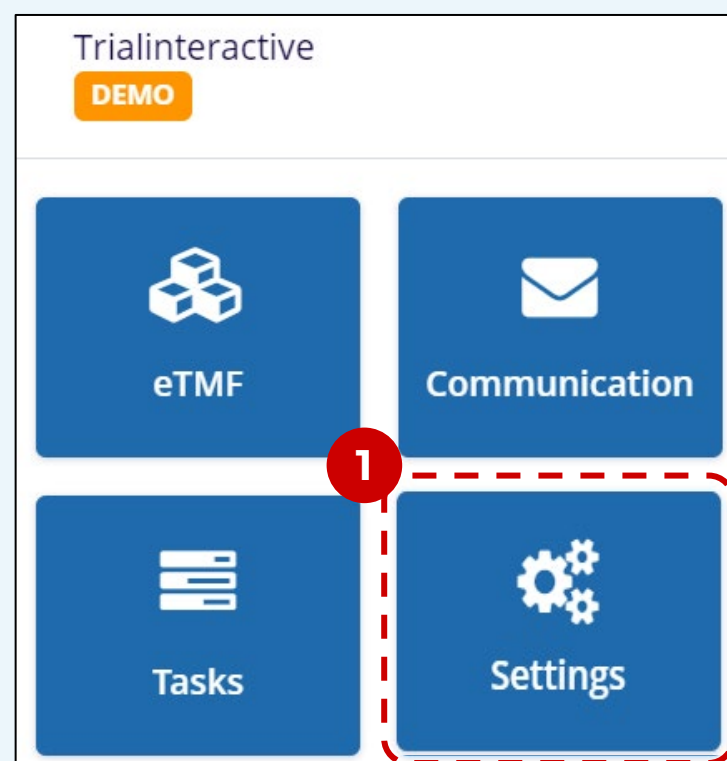
2 Open the **Document Types Management** submenu.

▼ 🏷 Document Types
　　🏷 Document Types Management
2 📄 Common Configuration

3 Select a **document type** to be configured for auto-naming.

☐ Document Type
　🏷 01 Trial Management\Trial Committee\Community Me
☐ 🏷 01 Trial Management\Trial Oversight
3
☑ 🏷 01 Trial Management\Trial Oversight\Audit Certificate
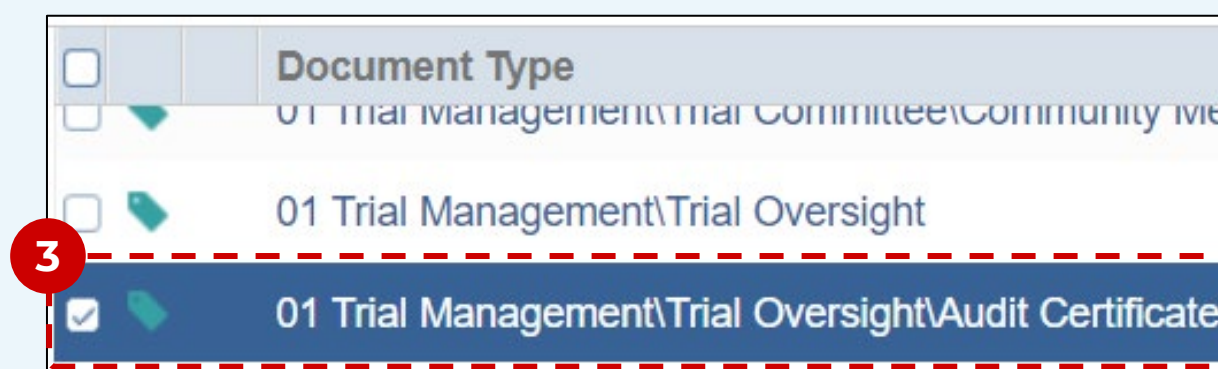
4 In the side panel, access the **Profile** tab.

o Required Documents | 📅 Change Log | Type name...
4
← | Profile | DocType Fields | Bulk Fields Update

5 Locate the **Auto Name Rules** field, and click the Wrench button.

Auto Name Rules:

$$RP.ProtocolNumber$$$$DT.DocumentTypeShortName$$$$DP.VersionNumber$$@GetDate(YYYYMMDD,$$DP.Document Date$$)

6 Use the Available Template panel to identify fields you want in your rule. **Double-click** on an entry to add it.

Available Templates:

Hardcoded	Functions	Field Insertions

Description	Insertion
PrincipalInvestigatorFirstName	##PrincipalInvestigatorFirstName##
PrincipalInvestigatorLastName	##PrincipalInvestigatorLastName##
SponsorName	##SponsorName##
ContactFirstName	##ContactFirstName##
ContactLastName	##ContactLastName##

Insertion Description

PrincipalInvestigatorLastName
Previewed as: Smith

7 Review the **Rule Editor** and **Preview** to check that the rule will work as you intend.
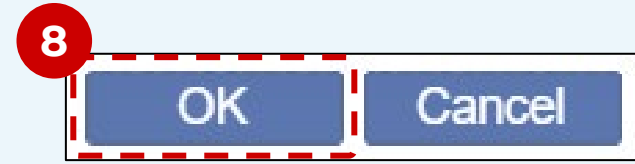
Rule Editor:

$$RP.ProtocolNumber$$$$DT.DocumentTypeShortName$$$$DP.VersionNumber$$@GetDate(YYYYMMDD,$$DP.Document Date$$)##SponsorName##

Preview:

Test Protocol Number_Test Short Name_Test Version Number_20241021_⬚oFarma Inc.

8 Click **OK** to exit the rule configuration window.

9 In the settings side panel, click **Save** to confirm the changes, or **Cancel** to discard.