APPLICABLE TO:
- Company Administrator
- Study Manager
- CRA
- CTMS

Global Level Information

Contact	Sponsor	Organization

Clinical Study Information

Product

Create	Manage

Program

Create	Manage

Study

Create	Manage	Tracking

Country

Create	Manage	Tracking

Site

Create	Manage	Tracking	Subjects	Site Visits	Visit Docs

Study Creation

Team Management	User Permission Definition

Study Management

Study Details	Study Settings	Activity Plan Templates
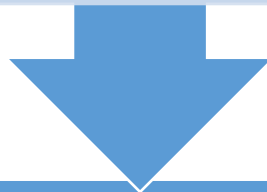
Study Tracking

Milestones	Countries	Sites	Org.	Contacts	Team	Activities	Activity Plans

TRIAL INTERACTIVE

Study

Study Creation

- Team Management
- User Permission Definition

Study Management

- Study Details
- Study Settings
- Activity Plan Templates Defined

Study Tracking

- Milestones
- Countries
- Sites
- Organizations
- Contacts
- Team
- Activities
- Activity Plans

TRIAL INTERACTIVE

Countries

Country Management
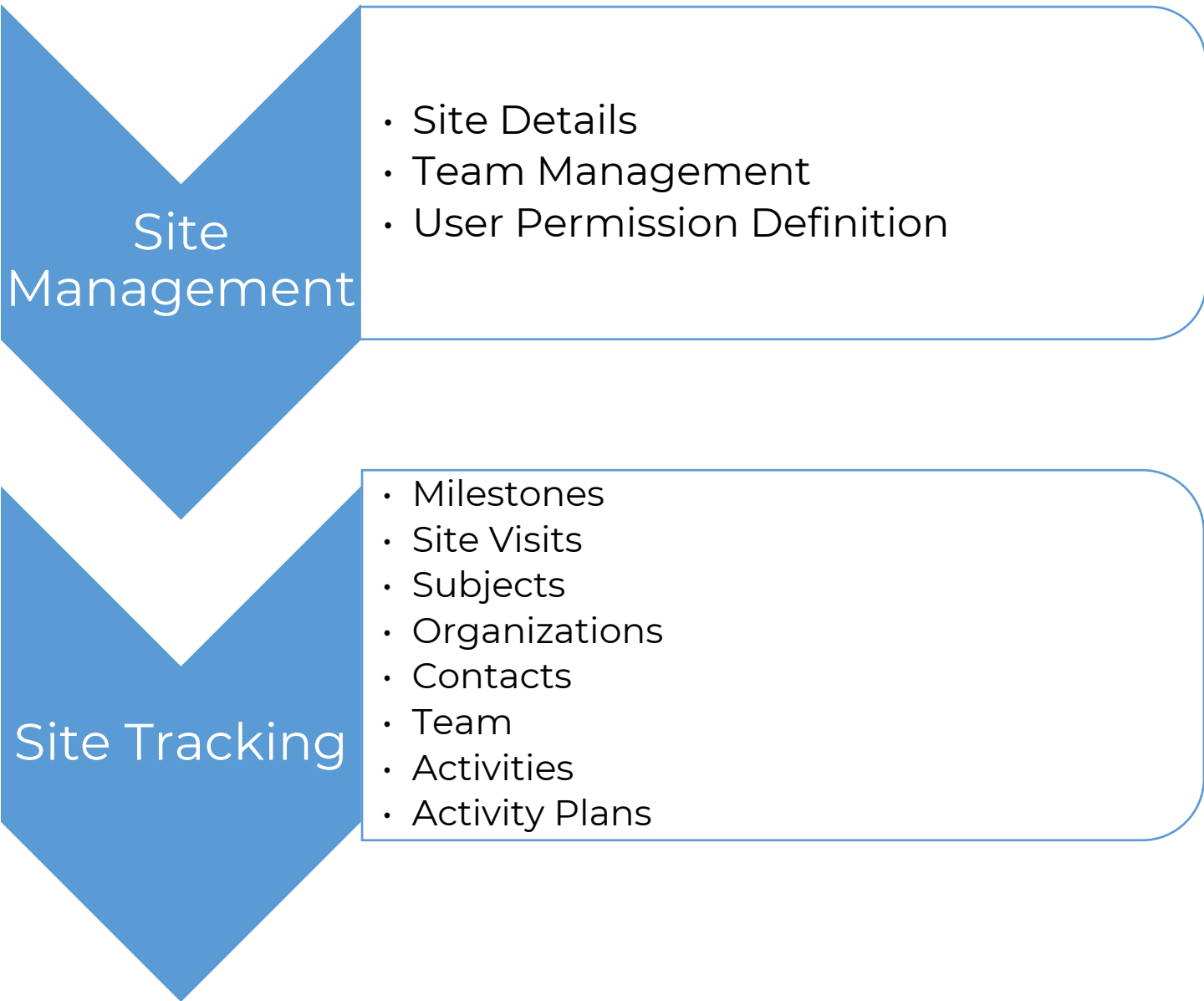
- Country Details
- Team Management
- User Permission Definition

Country Tracking

- Milestones
- Sites
- Organizations
- Contacts
- Team
- Activities
- Activity Plans

Sites

Site Management

- Site Details
- Team Management
- User Permission Definition

Site Tracking

- Milestones
- Site Visits
- Subjects
- Organizations
- Contacts
- Team
- Activities
- Activity Plans

Successful Site Visit Document Creation – Data Expectations

```
┌─────────────────────┐      ┌─────────────────────┐      ┌─────────────────────┐
│  Create a Study     │  →   │   Create a Site     │  →   │  Create a Site Visit│
│ (Study Manager step)│      │                     │      │    (CRA step)       │
└─────────────────────┘      └─────────────────────┘      └─────────────────────┘

┌─────────────────────┐      ┌─────────────────────┐      ┌─────────────────────┐
│ Ensure site visit   │  →   │ Generate site visit │  →   │ Document Author     │
│ report reviewers    │      │ related document    │      │ review/submit/      │
│ are defined for the │      │                     │      │ finalize site visit │
│ study               │      │                     │      │ document            │
└─────────────────────┘      └─────────────────────┘      └─────────────────────┘

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│ Document Reviewer   │  →   │ Document Author and │
│ review/reject/      │      │ Reviewer sign/      │
│ approve document    │      │ finalize the site   │
│                     │      │ visit document      │
│                     │      │ (Study Manager &    │
│                     │      │ CRA)                │
└─────────────────────┘      └─────────────────────┘
```