

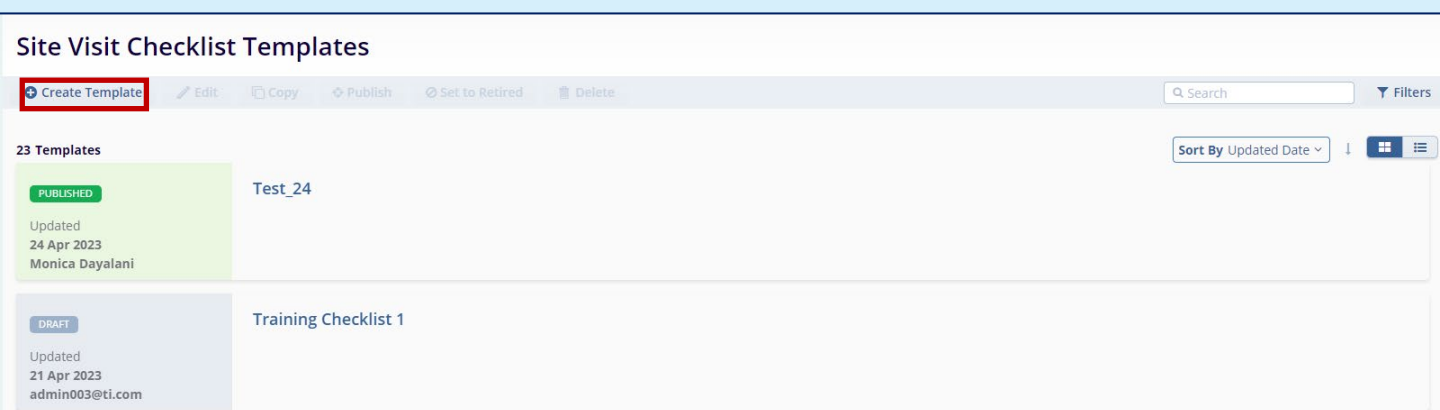
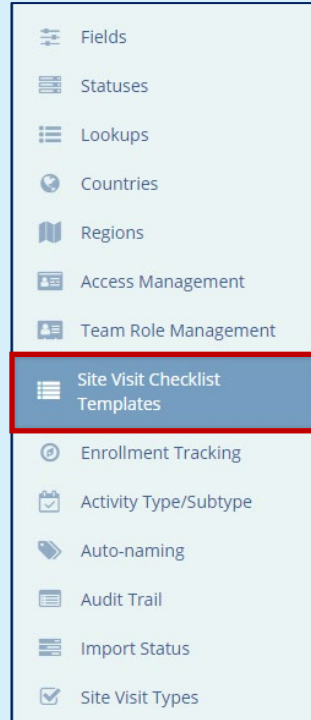
APPLICABLE TO:

- Company Admin
- Study Manager
- CRA
- CTMS

1. Navigate to the Settings area.

2. Select 'Site Visit Checklist Templates' from the navigation links at the left side of the screen.

3. Press the **+Create Template** button above the grid.



4. Name the Checklist Template and, if desired, add a description.

Create Site Visit Checklist Template

Site Visit Checklist Template Name*

Description

Cancel Create

5. Press **Create**.

6. Select the new checklist and press **Edit** from the menu at the top of the screen.

Site Visit Checklist Templates

+ Create Template Edit Copy Publish Set to Retired

24 Templates 1 Selected

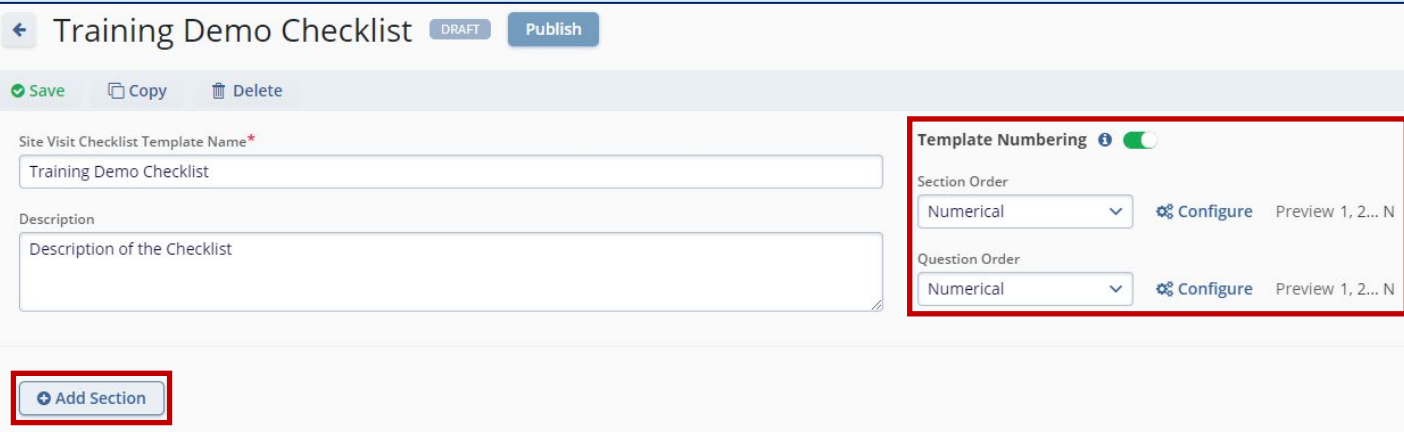
DRAFT

Updated
24 Apr 2023
admin003@ti.com

Training Demo Checklist

Description of the Checklist

7. If desired, turn on the Template Numbering via the toggle switch and select the schema.



Training Demo Checklist DRAFT Publish

Save Copy Delete

Site Visit Checklist Template Name*

Description

Template Numbering Configure Preview 1, 2... N

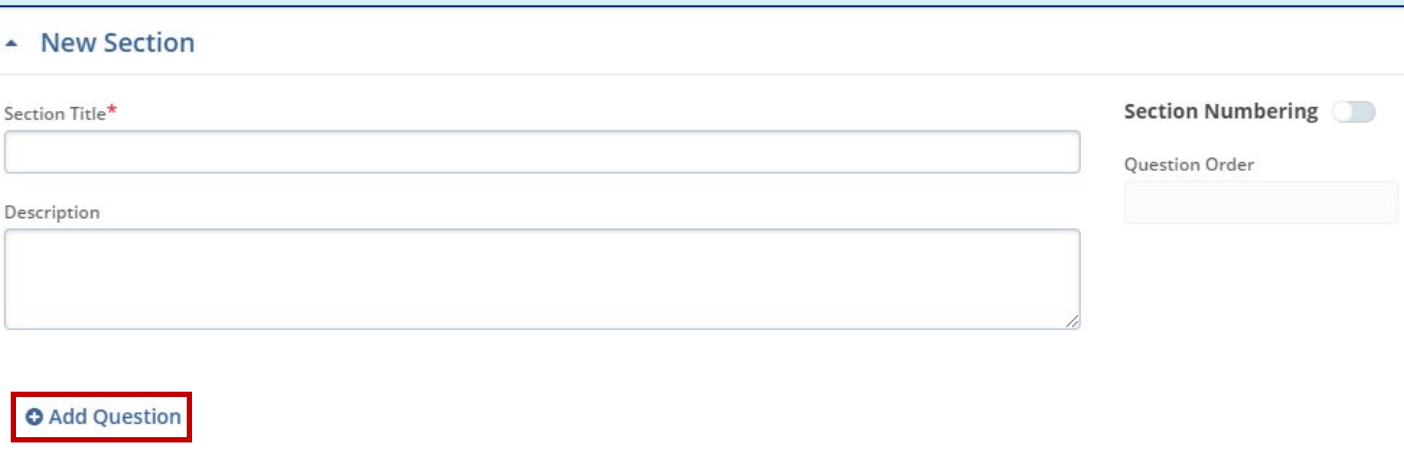
Section Order
 Configure Preview 1, 2... N

Question Order
 Configure Preview 1, 2... N

Add Section

8. Press **Add Section** and name the section.

9. Press **Add Question** to begin adding questions.



New Section

Section Title*

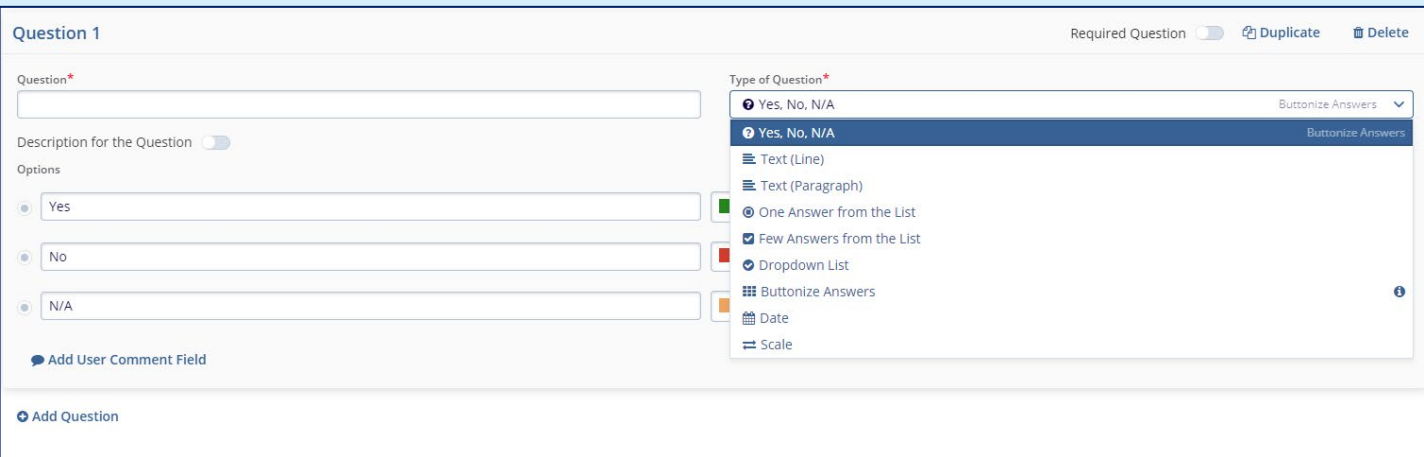
Description

Section Numbering

Question Order

Add Question

10. Choose the type of question that you would like to add. This selection will determine the steps required to complete configuring the question.



Question 1 Required Question Duplicate Delete

Question*

Description for the Question

Options

Yes

No

N/A

Type of Question*

- Yes, No, N/A Buttonize Answers
- Yes, No, N/A Buttonize Answers
- Text (Line)
- Text (Paragraph)
- One Answer from the List
- Few Answers from the List
- Dropdown List
- Buttonize Answers i
- Date
- Scale

11. Press **Save** whenever you would like to save your progress and when you are done editing the checklist template.



Site Visit Checklist Template Name*

Description

Template Numbering i

Section Order

Question Order