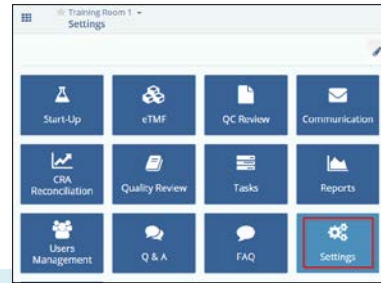
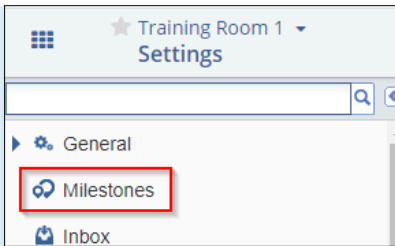


Applicable to: Administrators Editors Readers
 eTMF Study Start-up

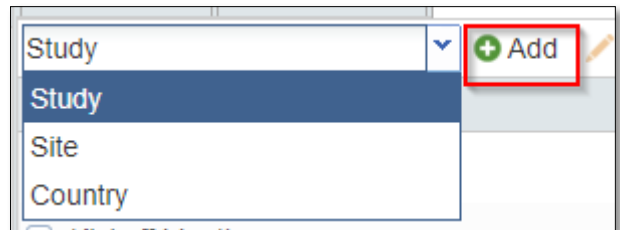
1. Click on **Settings** within the Navigation grid from the top left.



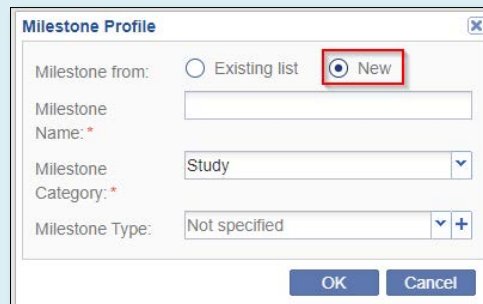
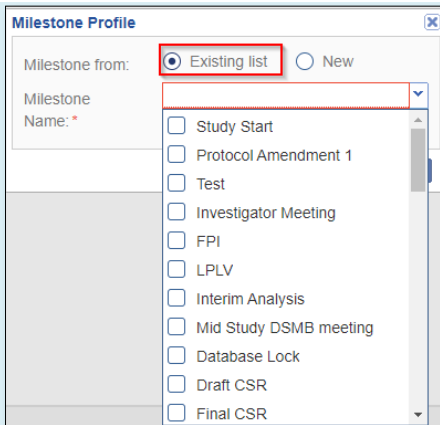
2. Click on **Milestones**.



3. Choose the category level for the Milestone from the drop down menu then click **Add**.

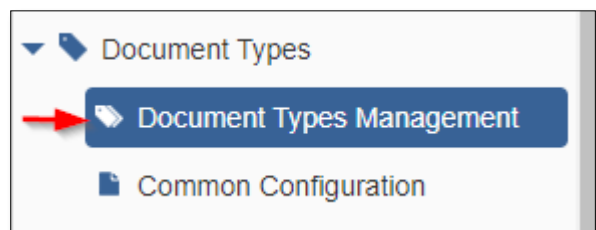


4. Choose to create from **Existing list** of names...



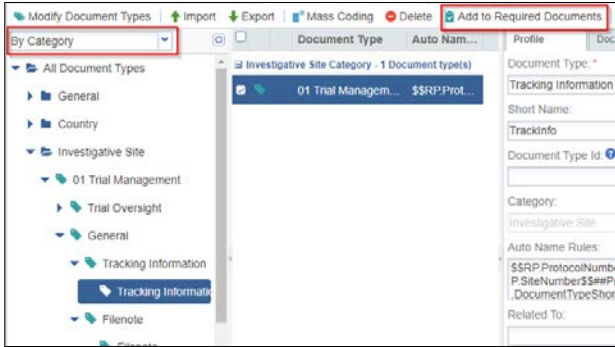
... or create a **New** one. Add Milestone Type. Click **Ok**.

5. From the Settings menu, under Document Types, click the **Document Types Management** sub menu.



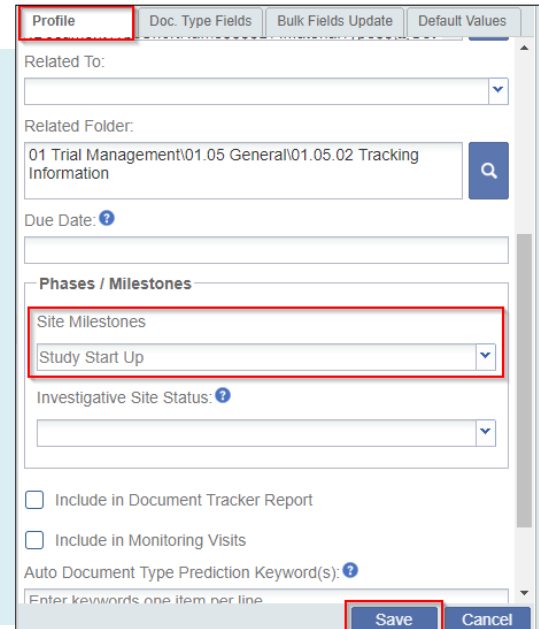
Tip: If applicable, click **Add to Required Documents** to include the document in eTMF completeness collection.

6. Within a Category, find the **Document Type** to be included in the milestone.



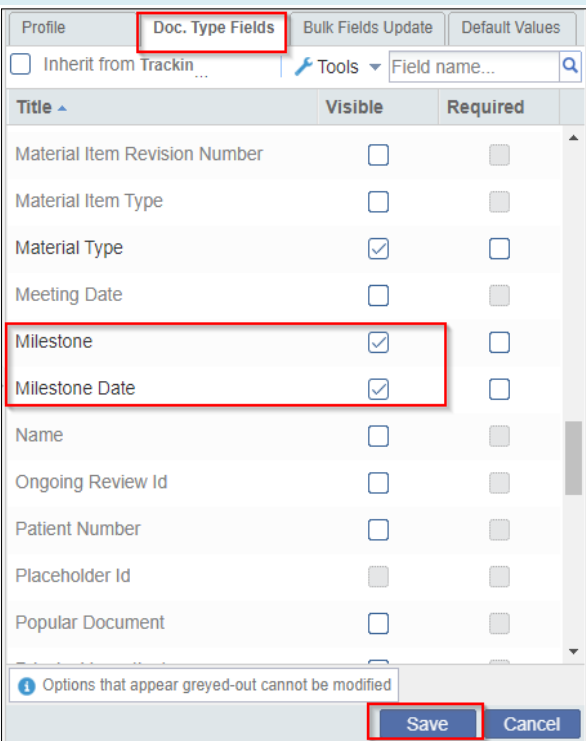
7. Under the **Profile** tab, Assign the milestone.

Click **Save**

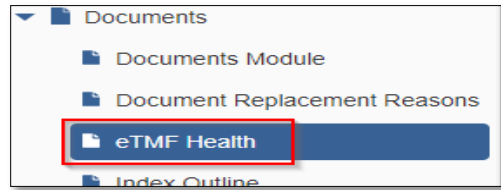


8. Under **Doc. Type Fields** tab, check Visible for the Milestone and Milestone Date fields.

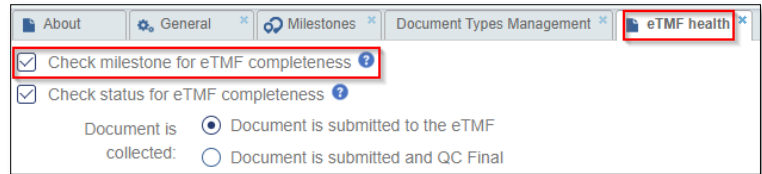
Click **Save**



9. Under Documents, click on the **eTMF Health** sub menu.

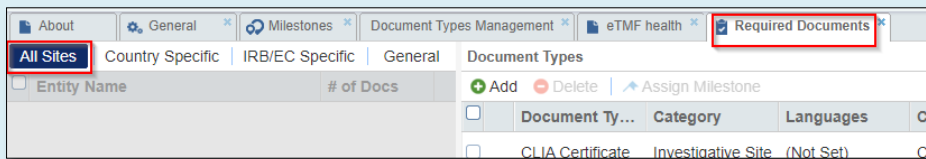
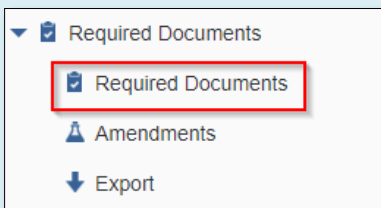


Click to check box for **Check milestone for eTMF Completeness.**



Click **Save**

10. Under Required Documents, click on the **Required Documents** sub menu.



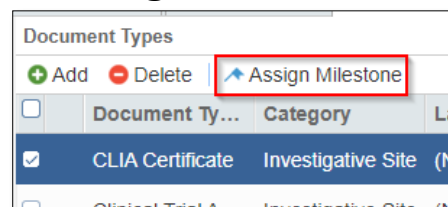
Click on the **Category, e.g. All Sites.**

Confirm the Document Type for the milestone document is listed.



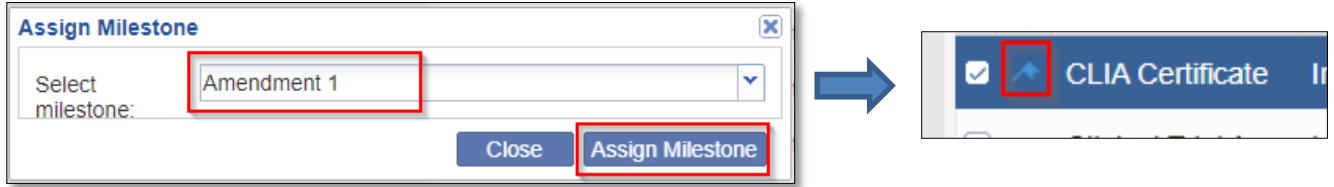
Select the Document Type, then click **Assign Milestone.**

11. Select the milestone(s) from the drop down.



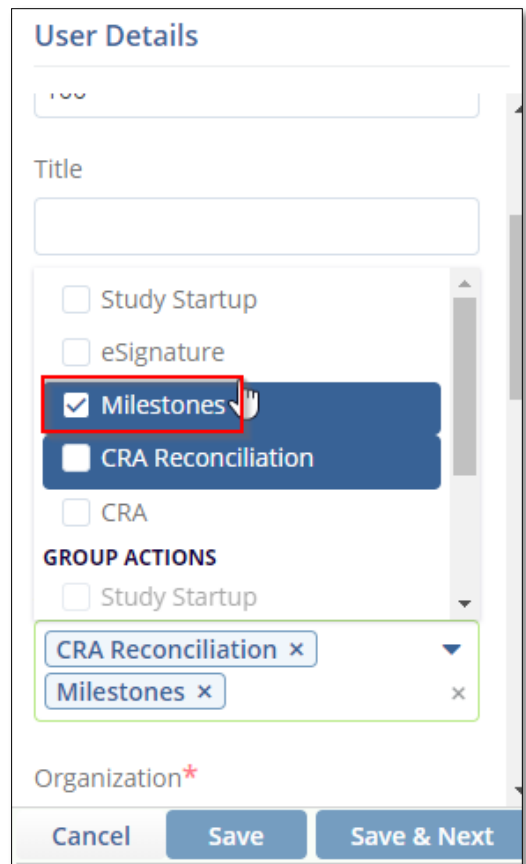
Click **Assign Milestone**

After the Milestone is assigned, the Document Type will update with a milestone icon.



12. Repeat the steps for additional documents or to set up additional milestones.

Tip: remember to check the **Milestones** as an **Action** under the User Profile for the users that need access to the module to add, edit, or track milestones.



See related job aid:
How to Add a Milestone

For any additional assistance, click ...

