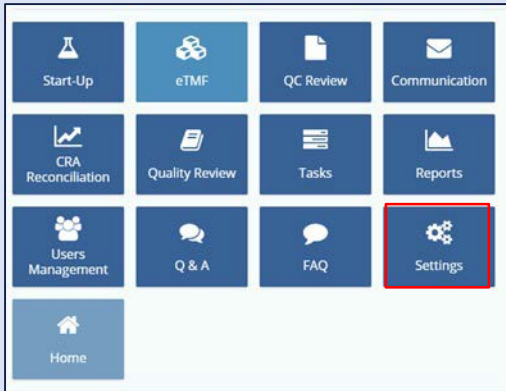


APPLICABLE TO:

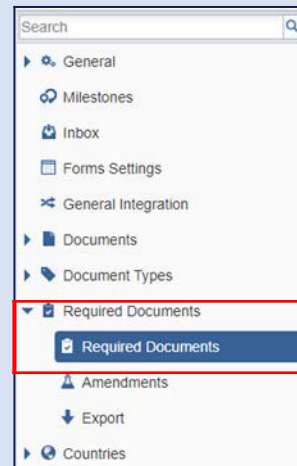
- Administrators
- Editors
- Readers

- eTMF
- Study Start-Up
- myTI

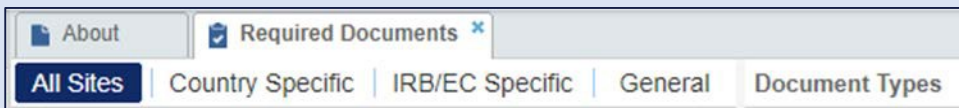


1. Go to the **Settings** menu in the Navigation Grid.

2. Expand the **Required Documents** menu and the **Required Documents** sub-menu.



3. Choose which category of document in order to add to, or edit, the list of Required Documents.




4. Click **Add**




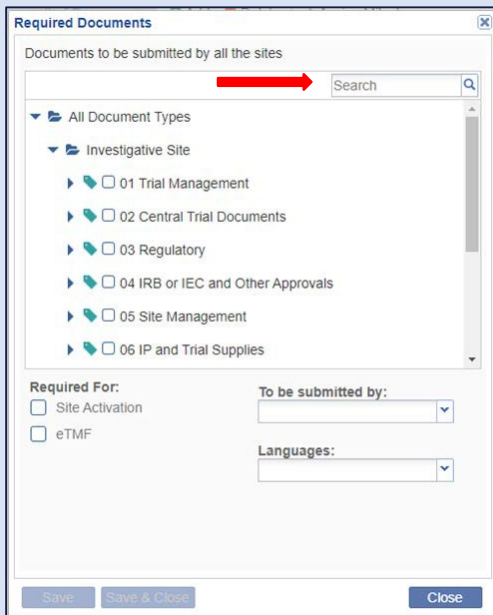
5. Select the document type by drilling down in the folder structure and checking the box.

 Expand the folders to view document types.


 Use the **search** box to find a document type.

6. Select from the **Required For** options: eTMF and/or Site Activation

 At least one must be selected before saving.




7. If necessary, open the **To be submitted by** drop-down menu and select a contact type.

 **To be submitted by** is optional, unless **contact type** is a required metadata field for the document type.

8. Click **Save** (to add another document type) or **Save & Close**



 The document type will now be included in the eTMF Health dashlet and eTMF completeness reports