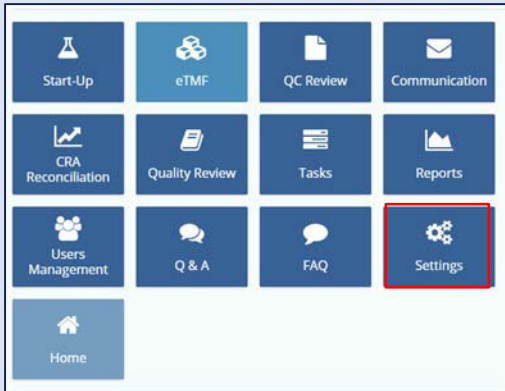


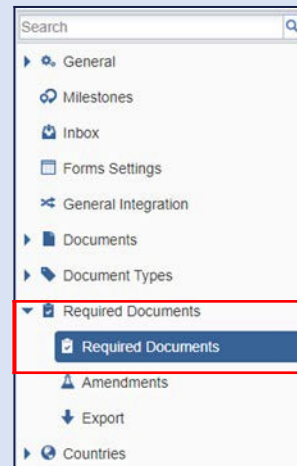
APPLICABLE TO:

- Administrators
- eTMF
- Room Managers
- Study Start-Up
- Editors
- myTI
- Readers

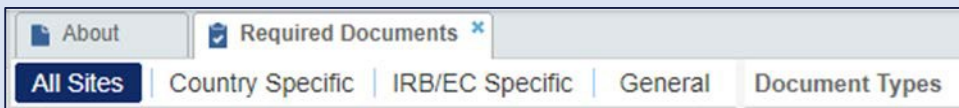


1. Go to the **Settings** menu in the Navigation Grid.

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



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



4. In the **Document Types** panel to the right, click **Add**



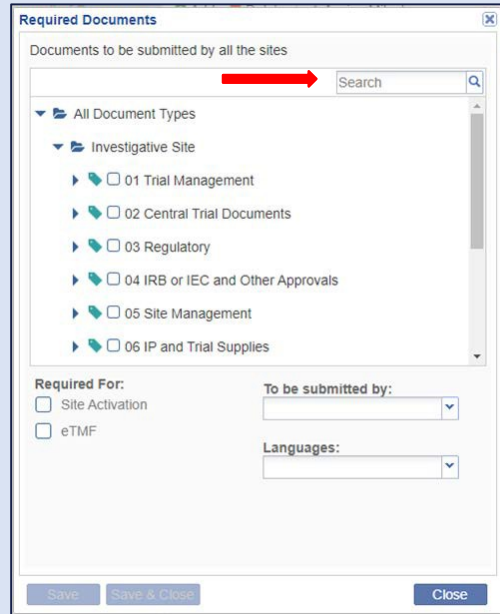
5. Select the document type by drilling down in the folder structure and checking the appropriate box.

Expand the folders to view document types.

Use the search box to find a document type.

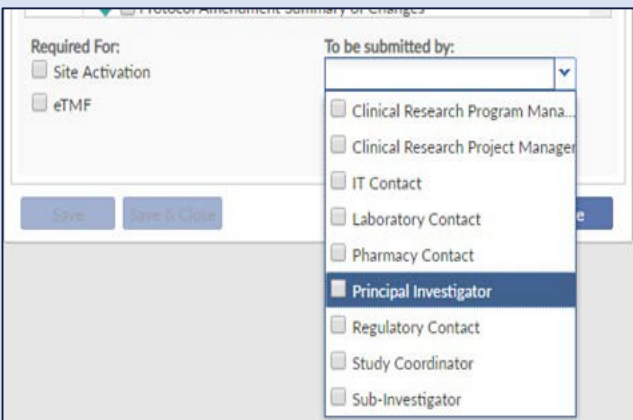
6. Select from the **Required For** options: eTMF and/or Site Activation

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 continue adding document types) or **Save & Close**



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