T R I A L INTERACTIVE

APPLICABLE TO:

- ● Administrators
- ○ Room Managers
- ○ Editors
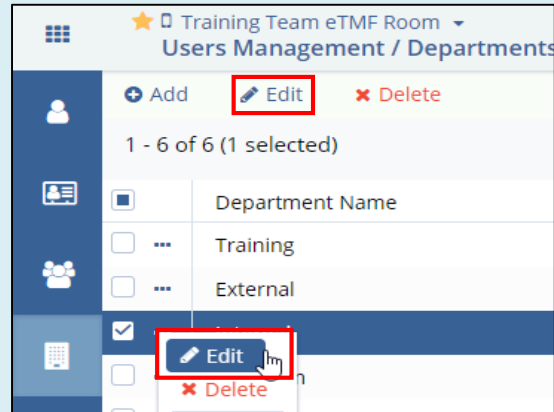- ○ Readers

- ● eTMF
- ○ Study Start-Up
- ○ myTI
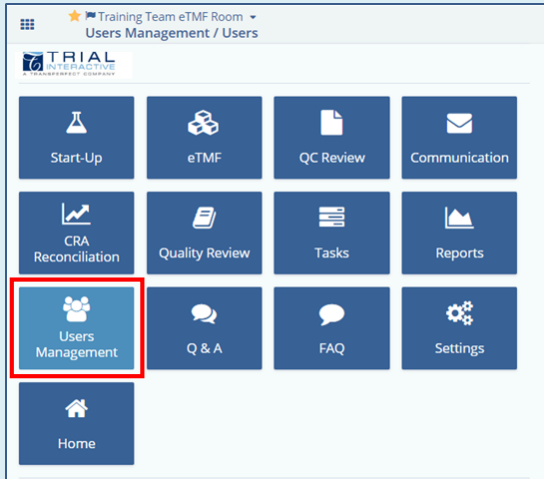
1. Navigate to the **Users Management** application from the Navigation Grid (waffle).

2. Click on the **Departments** Icon on the left-side vertical bar.

3. Select the Department which you want to assign document types to, then click **Edit** in the ribbon above the grid OR open the item action menu (three dots) and click **Edit**.
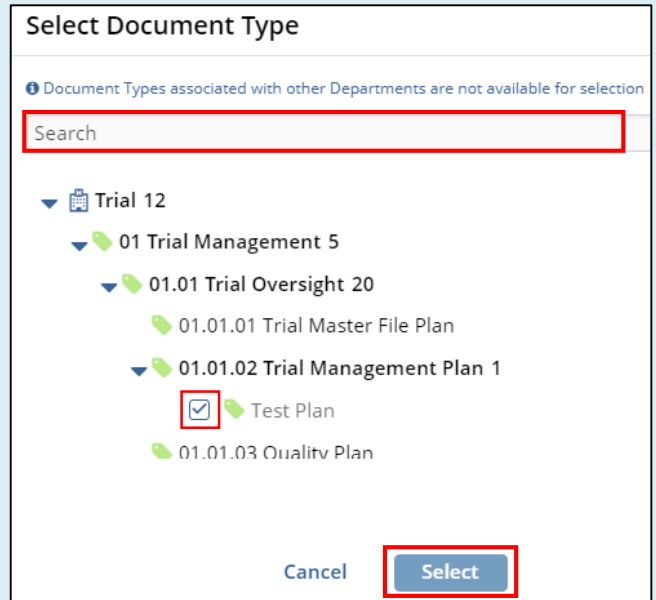
4. Select **Document Types**, then click **Add** to begin assigning document types to the chosen Responsible Department.
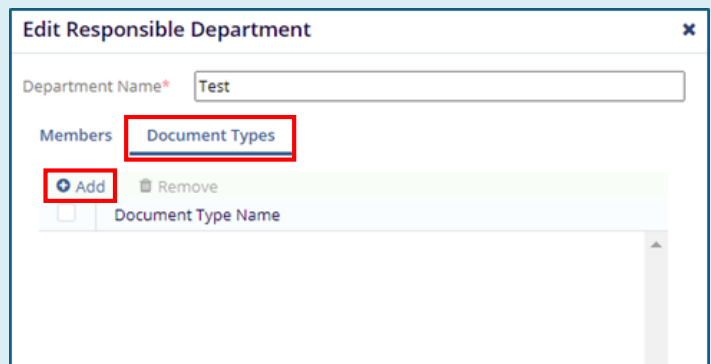
5. Select the document types you wish to assign by typing into the Search box, or by drilling down into folders.

📝 Note: Document Types already associated with other Responsible Departments will not be available for selection.

6. Click the box next to a document type and hit Select to add.

Select Document Type

ⓘ Document Types associated with other Departments are not available for selection

Search

- ▼ 🏛 Trial 12
  - ▼ 🏷 01 Trial Management 5
    - ▼ 🏷 01.01 Trial Oversight 20
      - 🏷 01.01.01 Trial Master File Plan
      - ▼ 🏷 01.01.02 Trial Management Plan 1
        - ☑ 🏷 Test Plan
      - 🏷 01.01.03 Quality Plan

Cancel   **Select**

Select Document Type

ⓘ Document Types associated with other Responsible Departments are not available for selection

Search

- ▸ ☑ 🏛 Trial 11
- ▸ ☐ 🌐 Country 11
- ▸ ☐ ⚗ Site 9

💡 Tip: To assign all document types within a specific zone or section at once (e.g. Trial, Country or Site), click the box next to it.

7. The document types displayed are associated with the chosen Responsible Department.
Click Save to close the interface.

📝 To maintain visibility on Departments for each document, you can add the column Responsible Department to any Grid View.

Edit Responsible Department ✕

Department Name* | Test

Members   **Document Types**

➕ Add   🗑 Remove

☐ Document Type Name

☐ Trial\01 Trial Management\01.02 Trial Team\01.02.02 Trial Team Curr...

☐ Trial\01 Trial Management\01.03 Trial Committee\01.03.04 Committee...

Close   **Save**