

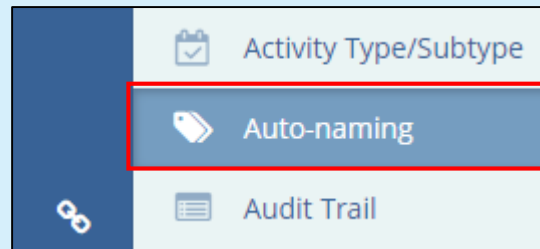
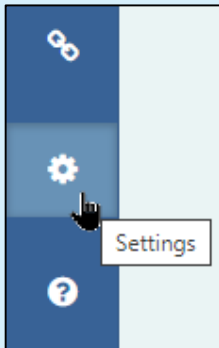
APPLICABLE TO:

- | | |
|---|--|
| <input checked="" type="radio"/> Administrators | <input checked="" type="radio"/> CTMS |
| <input type="radio"/> Managers | <input checked="" type="radio"/> eTMF/SSU |
| <input type="radio"/> Editors | <input checked="" type="radio"/> Collaborate |
| <input type="radio"/> Readers | <input checked="" type="radio"/> eISF |

Trial Interactive supports automatic generation of names for entities such as Studies, Sites, and even individual Documents.

This guide illustrates how an Admin-level user can configure this feature.

1. Log-in to CTMS. Navigate to the **Settings** area (lower-left corner) and select **Auto-naming**.



2. In the **Study** and **Site Auto-naming Rules** sections, the box on the left displays current settings. Examples below.

Study Auto-naming Rules

Study Auto-naming Rule Editor

##Protocol Number## ##Product Name##

Site Auto-naming Rules

Site Auto-naming Rule Editor

##PI Last Name## ##Site Number##

3. Click **Edit** at the top of the page to start configuration of naming rules.



4. Add naming terms (double-click on selected items) from the **Available Fields** box on the right.

4 Available Fields	
Insertion	Field Name
##Protocol Number##	Protocol Number
##Sponsor Name##	Sponsor Name
##Domain Name##	Domain Name
##Product Name##	Product Name


5. Review your current settings in the Rule Editor box. Notice that this is an editable text field, so you can add static text if you wish.

Study Auto-naming Rules

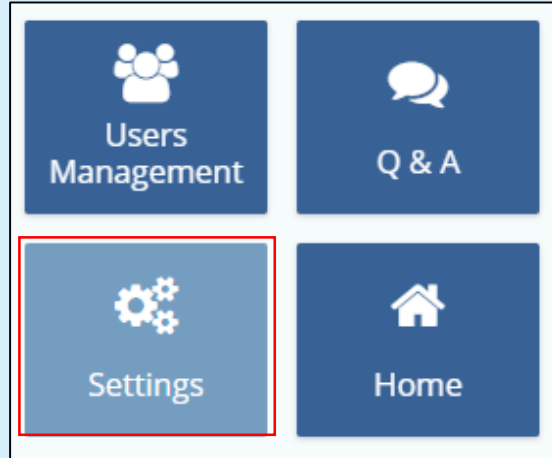
Study Auto-naming Rule Editor

##Protocol Number## ##Product Name## ##Domain Name## TESTING

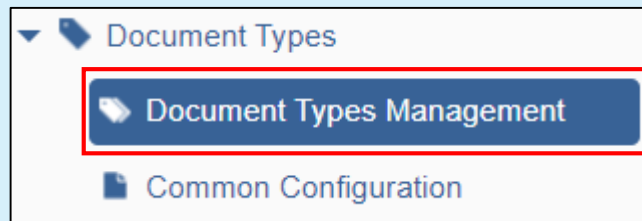
Select values from the list of Available Fields by double-clicking

 Based on the example above, if we generate a new study for our IP 'Newestdrug', we may see its name as "001 Newestdrug TrialInteractive TESTING".

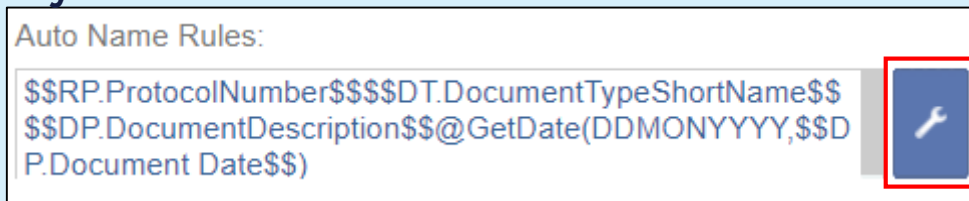
6. Non-CTMS TI rooms can be configured in the same manner, but the Administrator will need to access the Settings menu from the waffle.



7. Locate the sub-menu related to the entities to be configured (Site Common Configuration, Document Types Management).



8. Use the wrench button to open the configuration panel and add/remove values in the same manner as seen previously.



9. In this context, the Rule Editor has an extra feature: a **Preview** simulating the result of your edits. Just click on the **Refresh** button to populate the field.

Rule Editor:

##Country## ##SiteNumber## ##PrincipalInvestigator## ##InstitutionName##

Preview:



Preview:

USA 001 John Smith Medical University of South Carolina MUSC

