

How to Create a Site in TI Collaborate

TI version 10.8

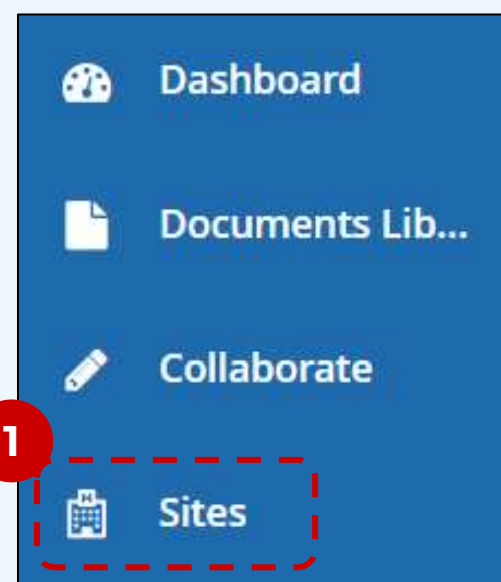
APPLICABLE TO:

- Admin
- Manager
- Editor
- Reader
- Collaborate
- eISF

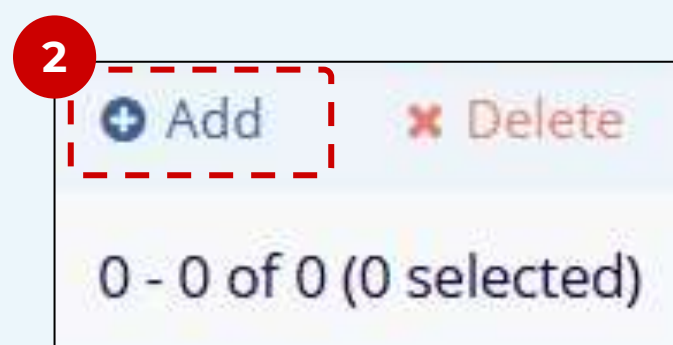


While this feature is presented with its standard name of 'Sites' here, it can take other names depending on room customization. For example, you could have 'Studies' or 'Offices'.

1 Within the Collaborative Workspace, navigate to **Sites**.



2 In the ribbon above the sites list, click **Add**.



3 Fill in the Site card. Only a **Name** and selecting an **IRB** are required, but all fields are important.

Most fields can also be edited after site creation.

Info

3a Institution Name * Site 1 ...

CRA ...

Start-Up Specialist ...

Site Number

Site

Disable auto Site name

Reason for not using auto Site name

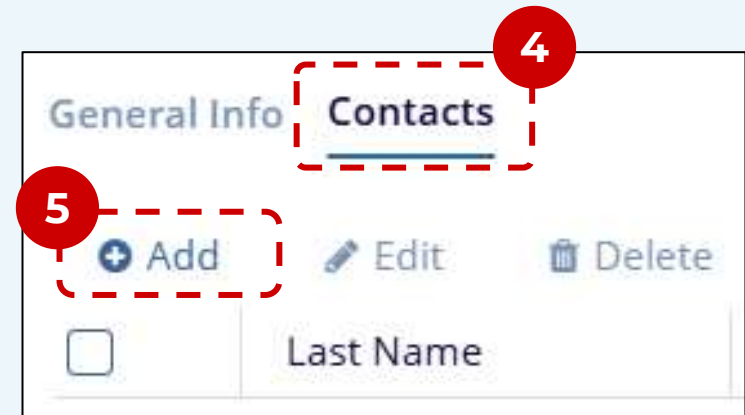
3b Main IRB/EC Name * ...

This field is required

4 After completing the General Info section, switch to **Contacts**.

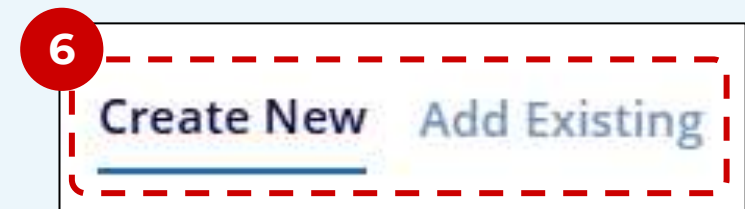


At least one 'main' contact is required and for clinical sites this is a Principal Investigator.

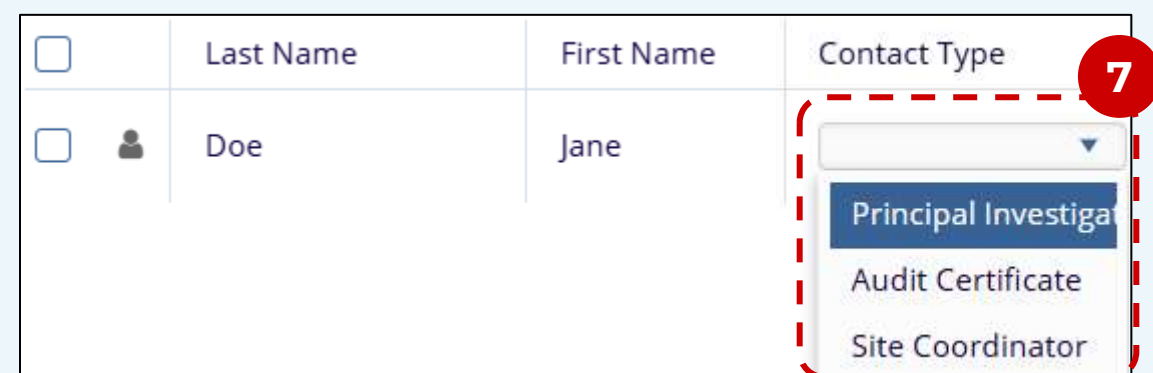


5 Click on **Add**.

6 Either **Create** a new profile or select from **Existing** contacts.



7 After setting the contact, assign it a role. For your first contact, you should use Principal Investigator or equivalent



8 Confirm site creation by clicking **Add** at the bottom of the window.

