

How to Setup Document Auto-Naming

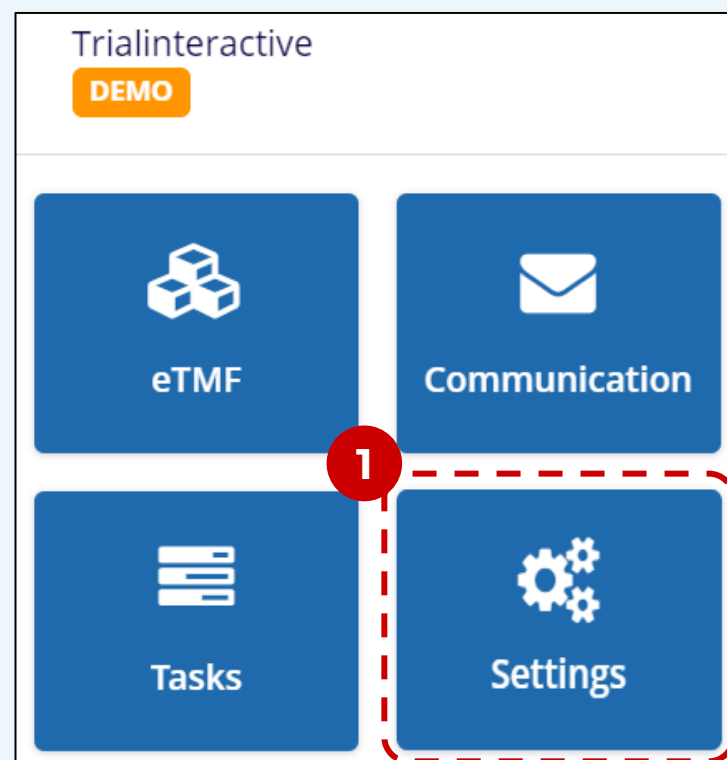
TI version 10.8

APPLICABLE TO:

- Admin
- Manager
- Editor
- Reader
- eTMF
- Collaborate

Although name generation rules are usually set up before go-live, it is still possible for Admins to edit the rules to account for any changes which may be required.

1 Log in to a room and enter the **Settings** area.



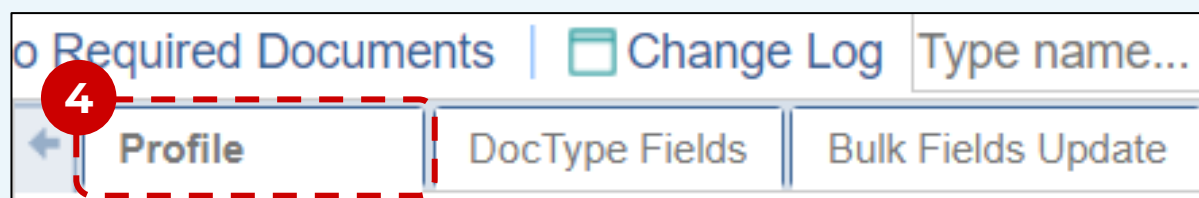
2 Open the **Document Types Management** submenu.



3 Select a **document type** to be configured for auto-naming.



4 In the side panel, access the **Profile** tab.



How to Setup Document Auto-Naming

TI version 10.8

- 5 Locate the **Auto Name Rules** field, and click the Wrench button.

Auto Name Rules:

```
$$$RP.ProtocolNumber$$$DT.DocumentTypeShortName$$$DP.VersionNumber$$@GetDate(YYYYMMDD,$$DP.Document Date$$)
```



- 6 Use the Available Template panel to identify fields you want in your rule. **Double-click** on an entry to add it.

Available Templates:

Description	Insertion
PrincipallInvestigatorFirstName	##PrincipallInvestigatorFirstName##
PrincipallInvestigatorLastName	##PrincipallInvestigatorLastName##
SponsorName	##SponsorName##
ContactFirstName	##ContactFirstName##
ContactLastName	##ContactLastName##

Insertion Description

PrincipallInvestigatorLastName
Previewed as: Smith

- 7 Review the **Rule Editor** and **Preview** to check that the rule will work as you intend.

Rule Editor:

```
$$$RP.ProtocolNumber$$$DT.DocumentTypeShortName$$$DP.VersionNumber$$@GetDate(YYY YMMDD,$$DP.Document Date$$)##SponsorName##
```

Preview:

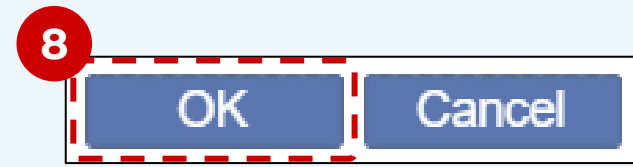
Test Protocol Number_Test Short Name_Test Version Number_20241021_ of Farma Inc.



How to Setup Document Auto-Naming

TI version 10.8

- 8 Click **OK** to exit the rule configuration window.



- 9 In the settings side panel, click **Save** to confirm the changes, or **Cancel** to discard.

