

How to Add a Required Document for Study Start-Up within Settings

TI version 10.8

APPLICABLE TO:

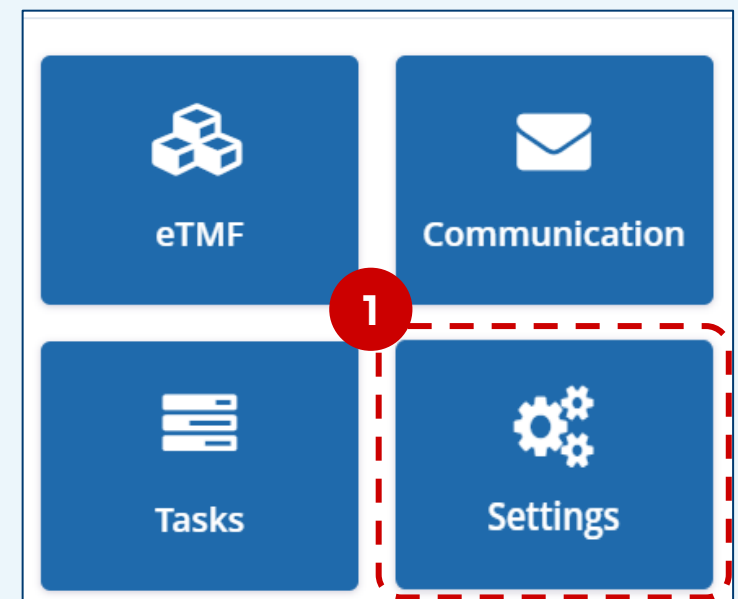
- Admin
- Manager
- Editor
- Reader
- eTMF
- SSU

TI's eTMF/SSU rooms support displaying lists of Required ('expected') Documents as placeholders. If new/additional required documents are needed, they can be added via the **Settings** module.

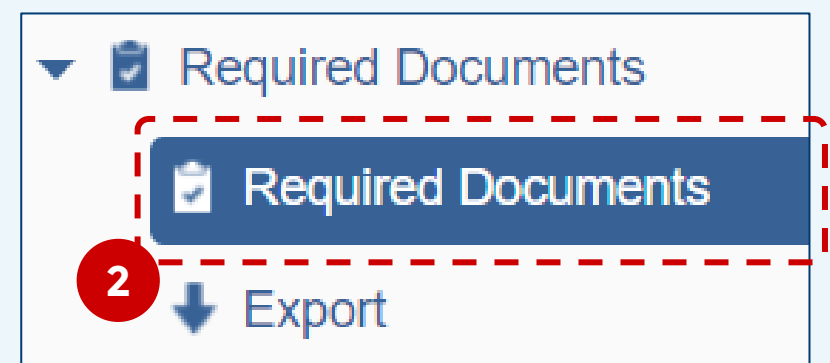
Required documents are be set up (ideally in the room configuration phase) to simplify user experience, as this process prepares auto-generated lists of documents needed whenever a new entity (site, country or IRB) is generated.

Any and All changes made to the Required Documents list need to be communicated to your CSM AND should be documented in the Change Log.

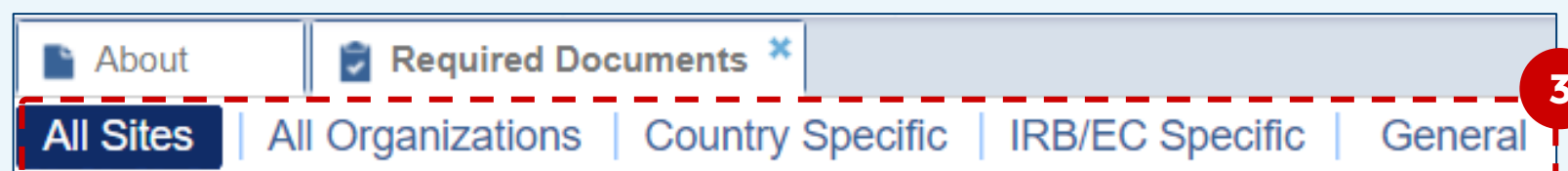
1 Log in to a room and enter the **Settings** area.



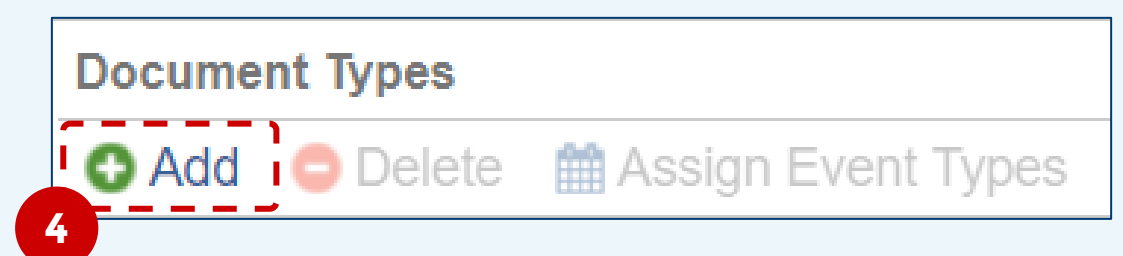
2 Open the **Required Documents** submenu.



3 Choose to what **level of entity** the required document will be applicable.



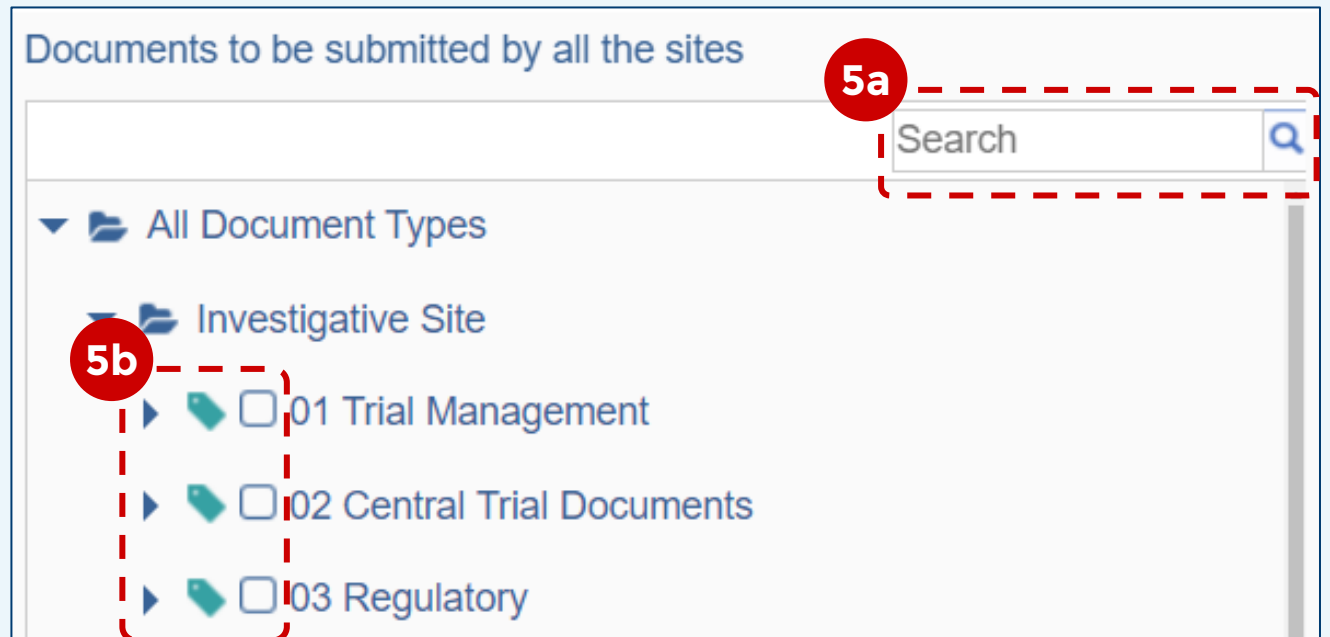
4 In the Document Types side panel on the right, click **Add**.



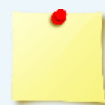
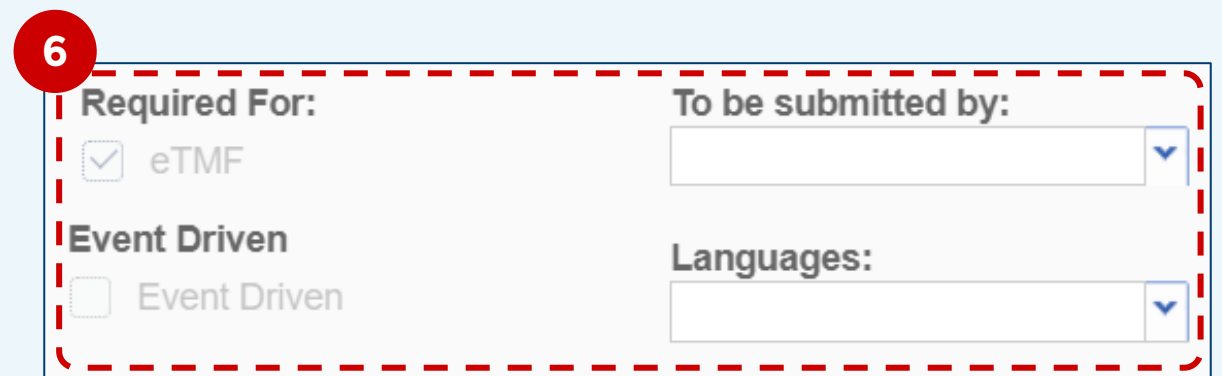
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- 5 Type into the searchbox or **expand folders** to select the desired document type(s).



- 6 Move onto the **additional options**. Make sure to select the **Study Start Up** option under the Required For header.



Event Driven should only be selected if Event Manager is being used, AND, if the new required document will be associated with an Event..

- 7 Click **Save & Close** to finalize.



- 8 The Document Types panel allows you to review preferences and status. You may want to *Assign* a selected doctype to events of a certain type (see *Event Type creation* materials and/or training).

Document Types					
	Documen...	Category	Languages	Contact	Required
<input type="checkbox"/>	Filenote M...	Investigati...	English	Principal I...	eTMF
<input checked="" type="checkbox"/>	Form FDA...	Investigati...	(Not Set)	Principal I...	eTMF