How to Track Budgets or Contracts

TI version 10.8

TRIAL INTERACTIVE

APPLICABLE TO:

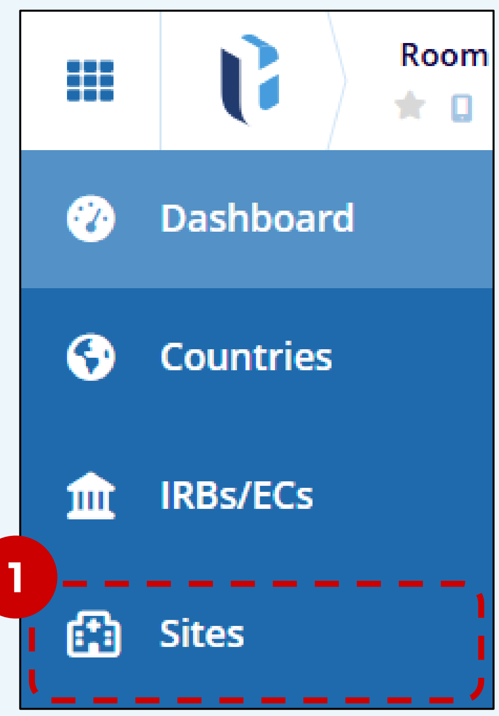
- ● Admin
- ● Manager
- ● Editor
- ○ Reader

- ● Study Start Up
- ○ eISF

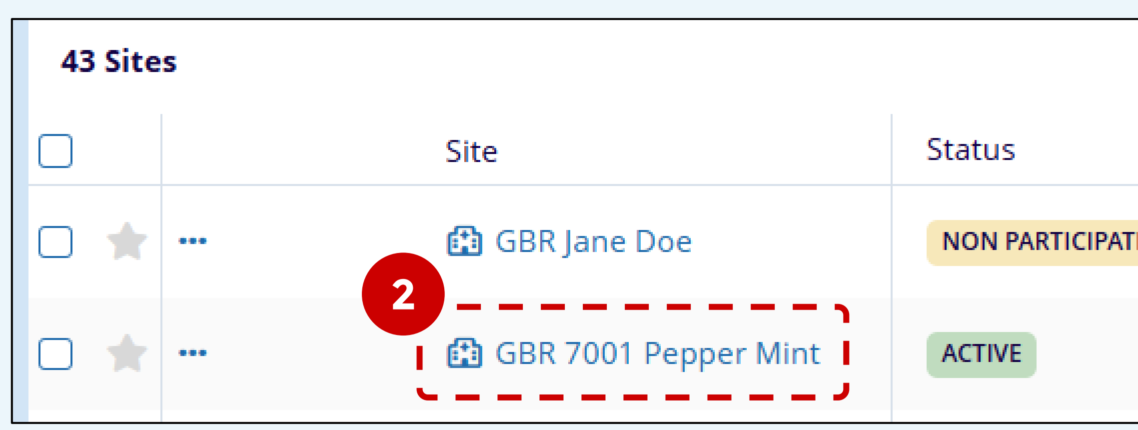
The *Budgets & Contracts* area allows study managers to track any documents related to site budgets and agreements in one place, and monitor the related status. This simplifies activities and eliminates the need for multiple trackers.

1 Navigate to the **Sites** section of SSU. Locate a Site.

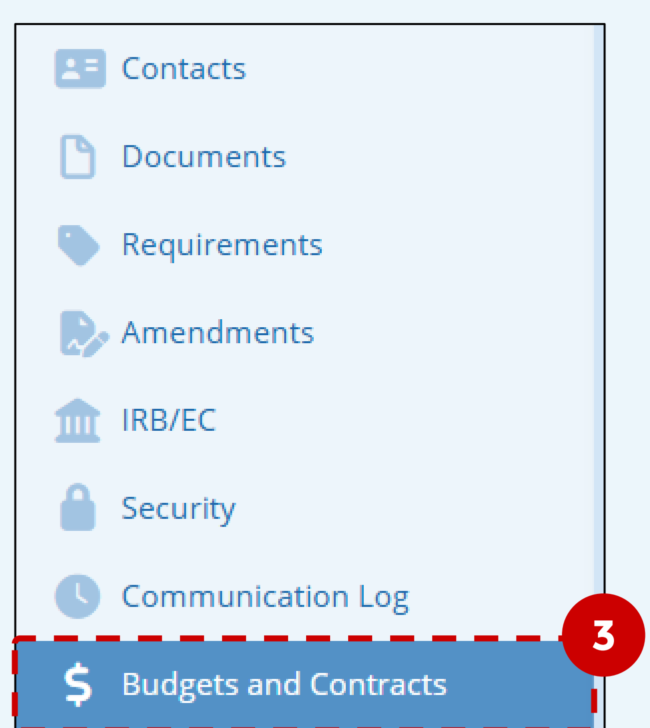
You may also locate and enter Sites via the dashboard, using the *Site Activation Cycle Time* dashlet.



2 Click on the **Site name** to enter the Site profile.



3 Select **Budgets and Contracts** from the left-hand panel.



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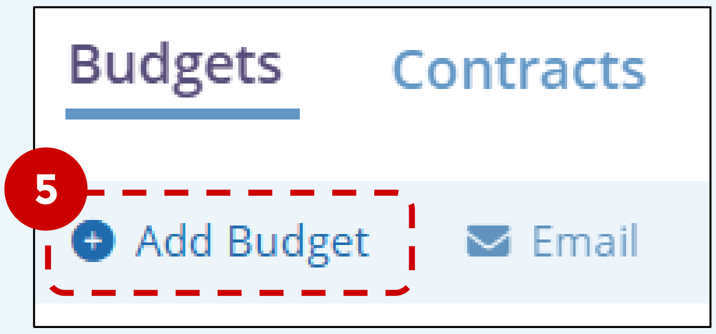
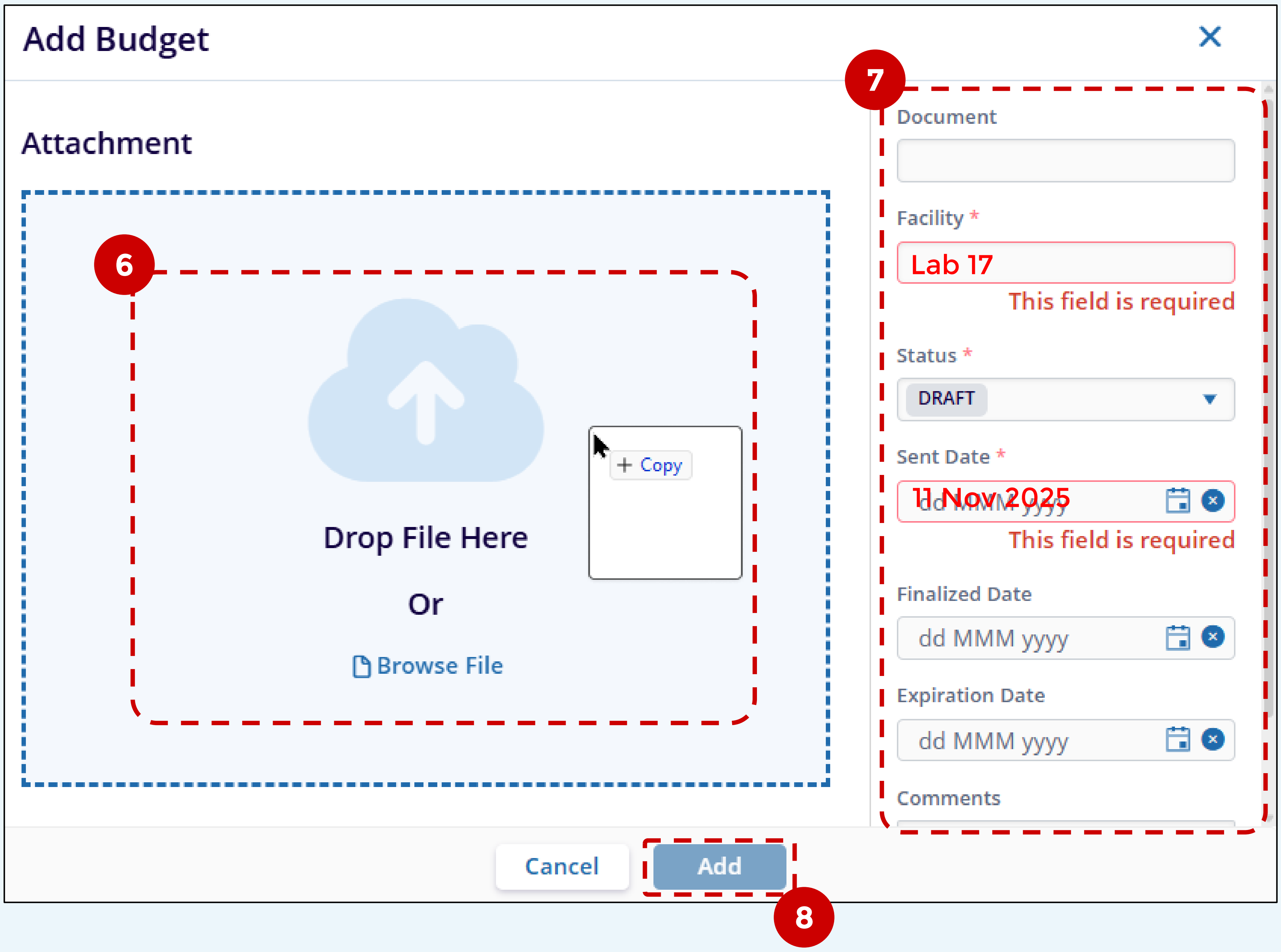
4 Select either **Budgets** or **Contracts**. The process is identical from this point on.

5 Click on the **Add Budget/Contract** button.



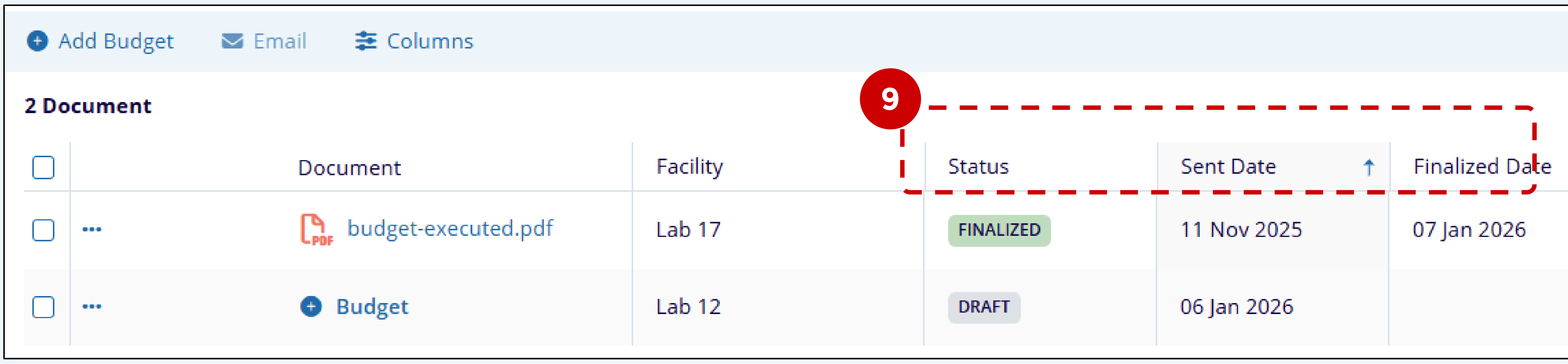
6 Add a file via the **drag&drop interface** or click on **Browse** to explore files.

7 Complete the **data fields** on the right (asterisks mark mandatory fields).



8 When completed, click **Add** to file the item and close the window.

9 The information for your budget or contract will be added to the grid, where it can be easily reviewed.



Did you know? You can add items without an attachment. Simply do not drag or select a document for step #6. This can be used to plan future documents or when a draft/signed version is not available yet.

10 When an item is selected, a new menu appears in the ribbon, allowing users to Edit properties, Edit the document ('attachment'), or remove an entry. The ribbon also contains an option to **Email** the document (10b).