How to Assign Contacts to Sites

TI version 10.7

TRIAL INTERACTIVE

APPLICABLE TO:
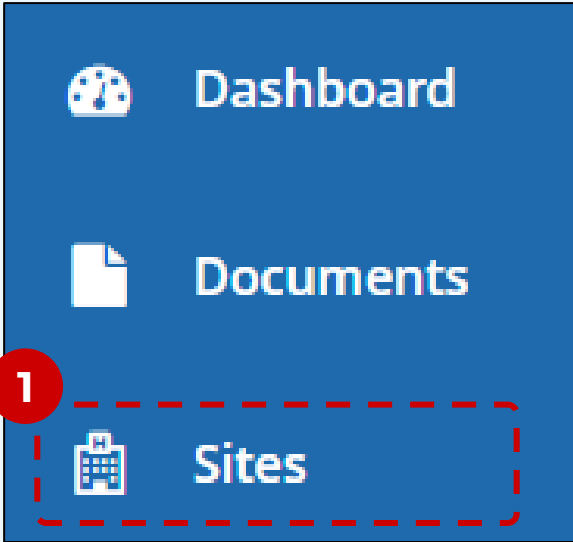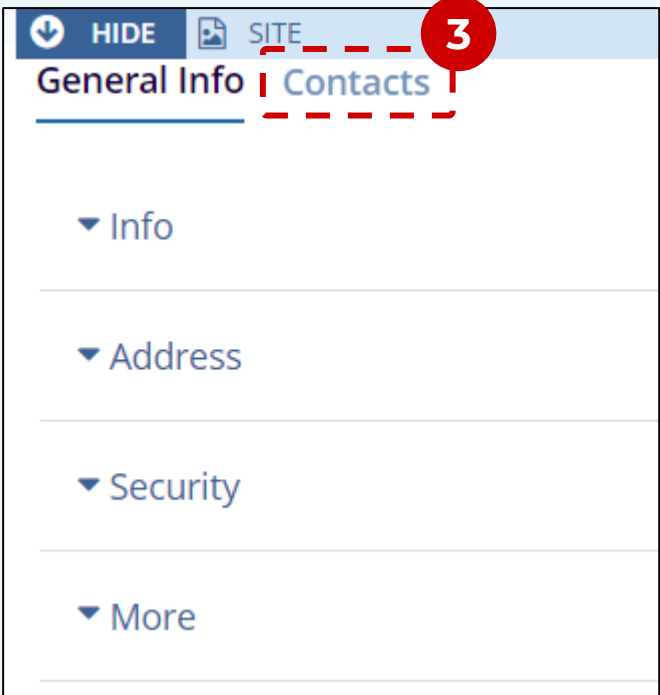
- ● Admin
- ● Manager
- ● Editor
- ○ Reader

- ● eTMF
- ● eISF

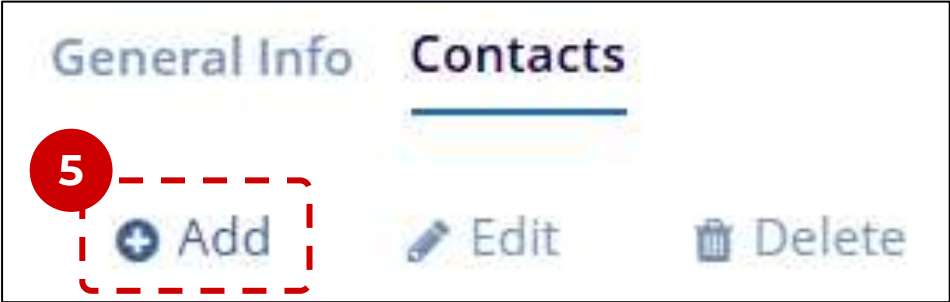**1** Enter a room and open the **Sites** module in the eTMF or Collaborative Workspace context.

2 Select **one** Site.
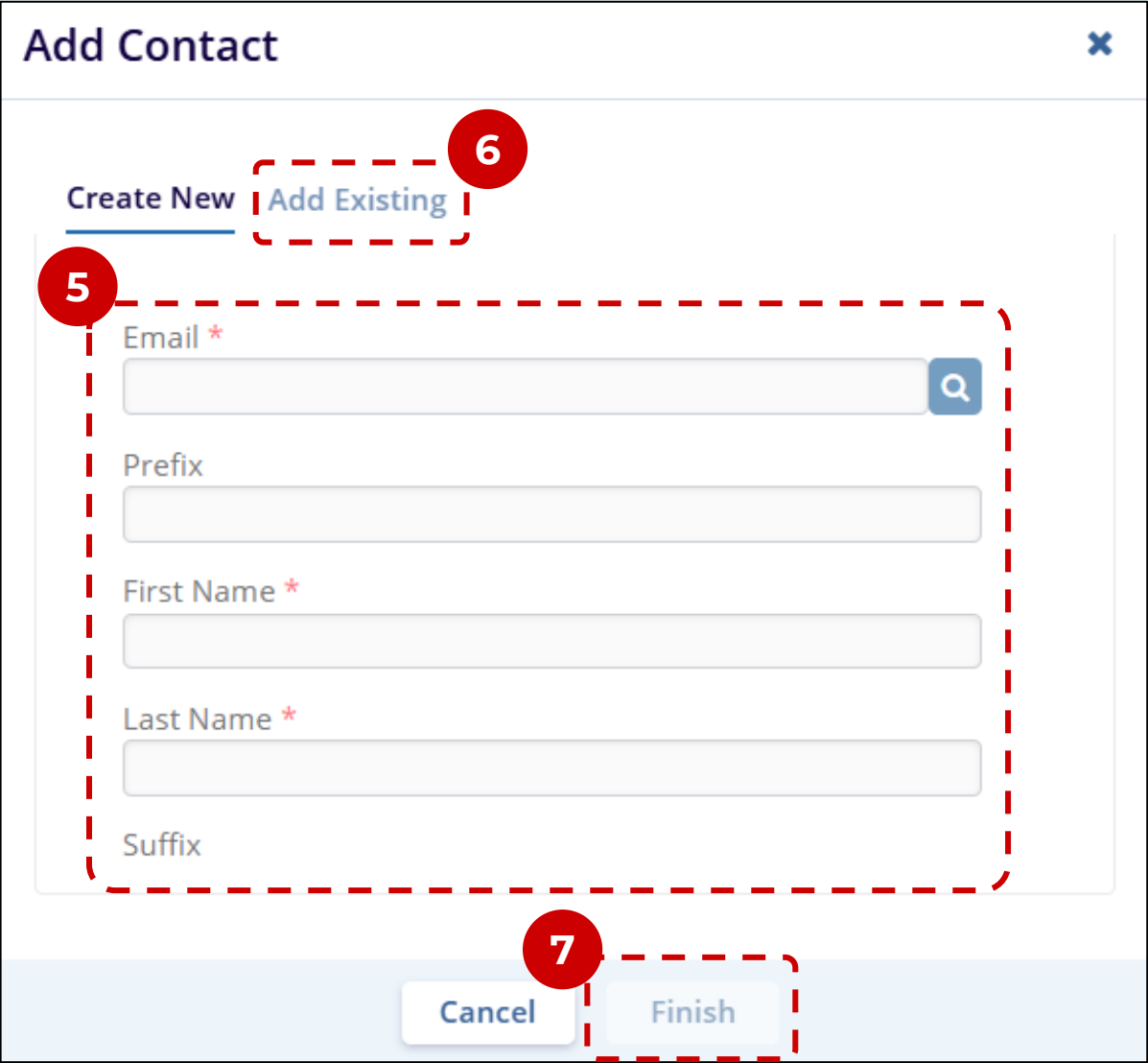

3 Expand the Site pane at the bottom of your screen.
Switch to the **Contacts** tab.

4 Click on the **Add** button.

General Info **Contacts**

5 ⊕ Add · ✏ Edit · 🗑 Delete

5 **Fill** all required details for a new contact.

6 Alternatively, you can select from the pool of existing contacts with **Add Existing**.

Add Contact ✕

6 Create New │ Add Existing

5 Email *

Prefix

First Name *

Last Name *

Suffix

7 Click **Finish** to create/finalize.

7 Cancel │ Finish

8 Contacts should be associated with a job function (**Contact Type**).

		Last Name	First Name	Email	Contact Type
☐	👤	Parik	Olive	drolive▓▓▓▓	Principal Inve ▾
☐	👤	Coord	Lab	▓▓▓▓.com	**8** ▾

9 Click **Save.**

Cancel · **9** Save · Save & Next