

- APPLICABLE TO:
- Admin

Manager

Editor

Reader

eTMF

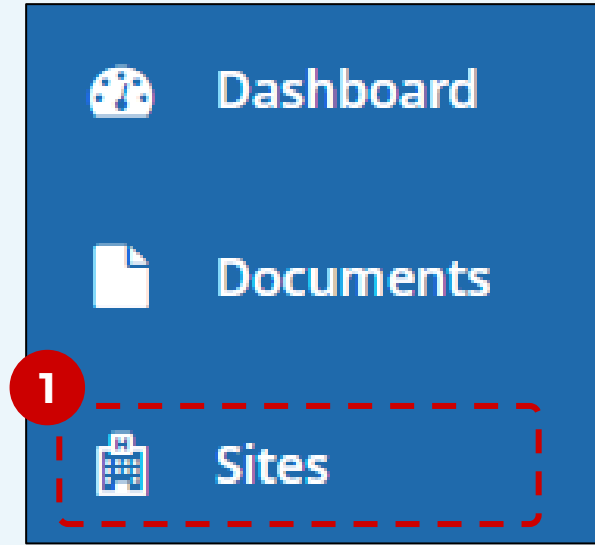
eISF

In TI eTMF and eISF rooms, Contacts are managed through the Sites page. This can be used both to create new Contacts, and to assign contacts to their respective Sites and roles.

While in most cases Contacts and their details are imported en-masse from sources like lists or CTMS, it remains possible to manually manage Contacts one-by-one. This Job Aid describes how.

1

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



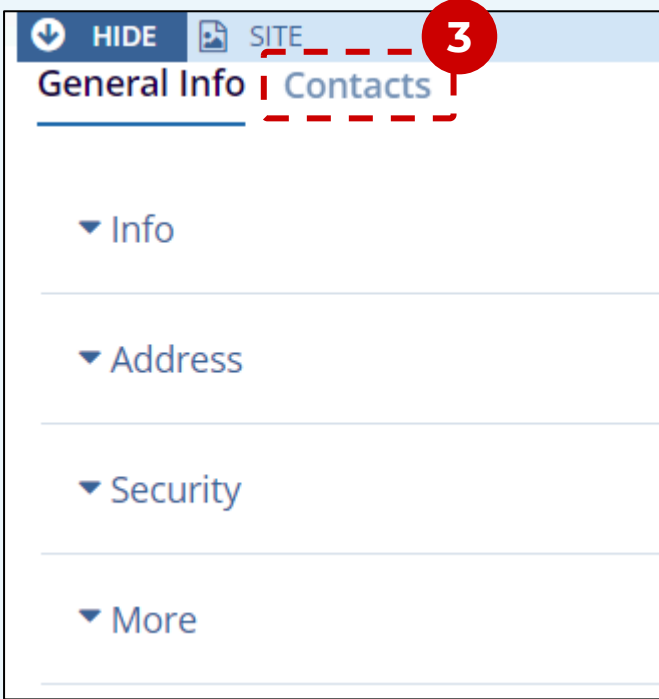
2

Select **one** Site.

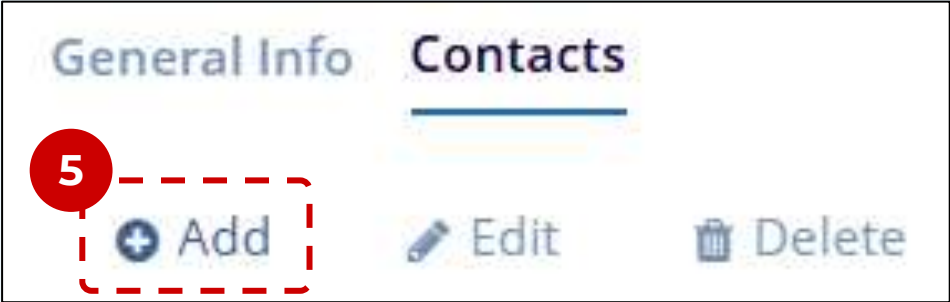
1 - 2 of 2 (1 selected)			
☐		Institutio...	Site Status
☐	...	★	Toronto H...
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3

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

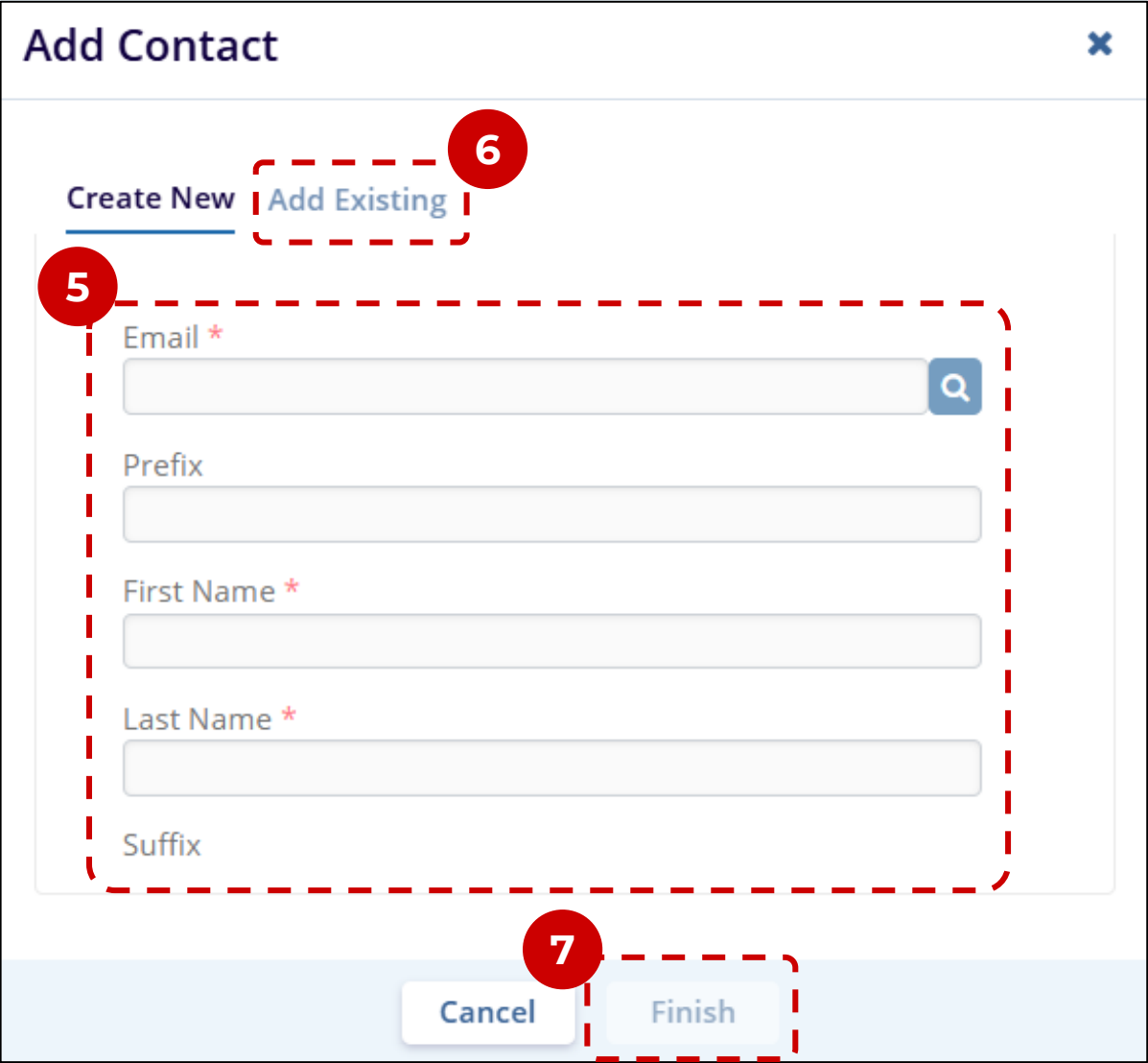


4 Click on the **Add** button.



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

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



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

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

9 Click **Save**.

☐	Last Name	First Name	Email	Contact Type
☐	 Parik	Olive	drolive@...com	Principal Inve v
☐	 Coord	Lab	...com	v
Cancel				Save Save & Next