How to Create a Site in eTMF Rooms

TRIAL INTERACTIVE

TI version 10.8

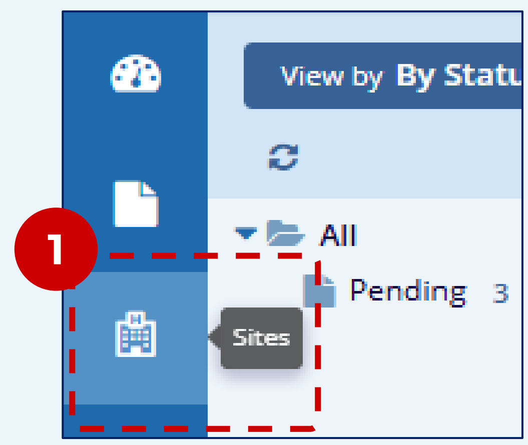
APPLICABLE TO:

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

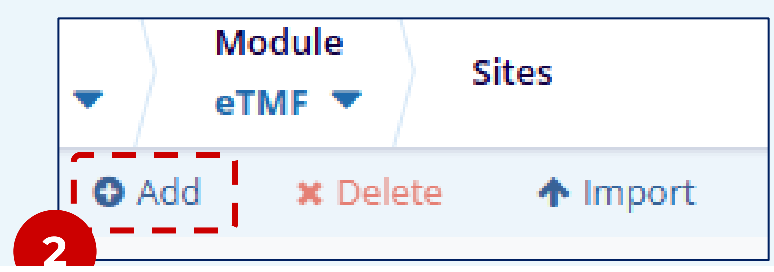
● eTMF

Although Sites are added to TI rooms most commonly through bulk import or system automated processes, there may be circumstances where a single site needs to be added manually. This document guides you through the process of creating a new site for use in an eTMF room.

1 Log into a room and navigate to the **Sites Module**.

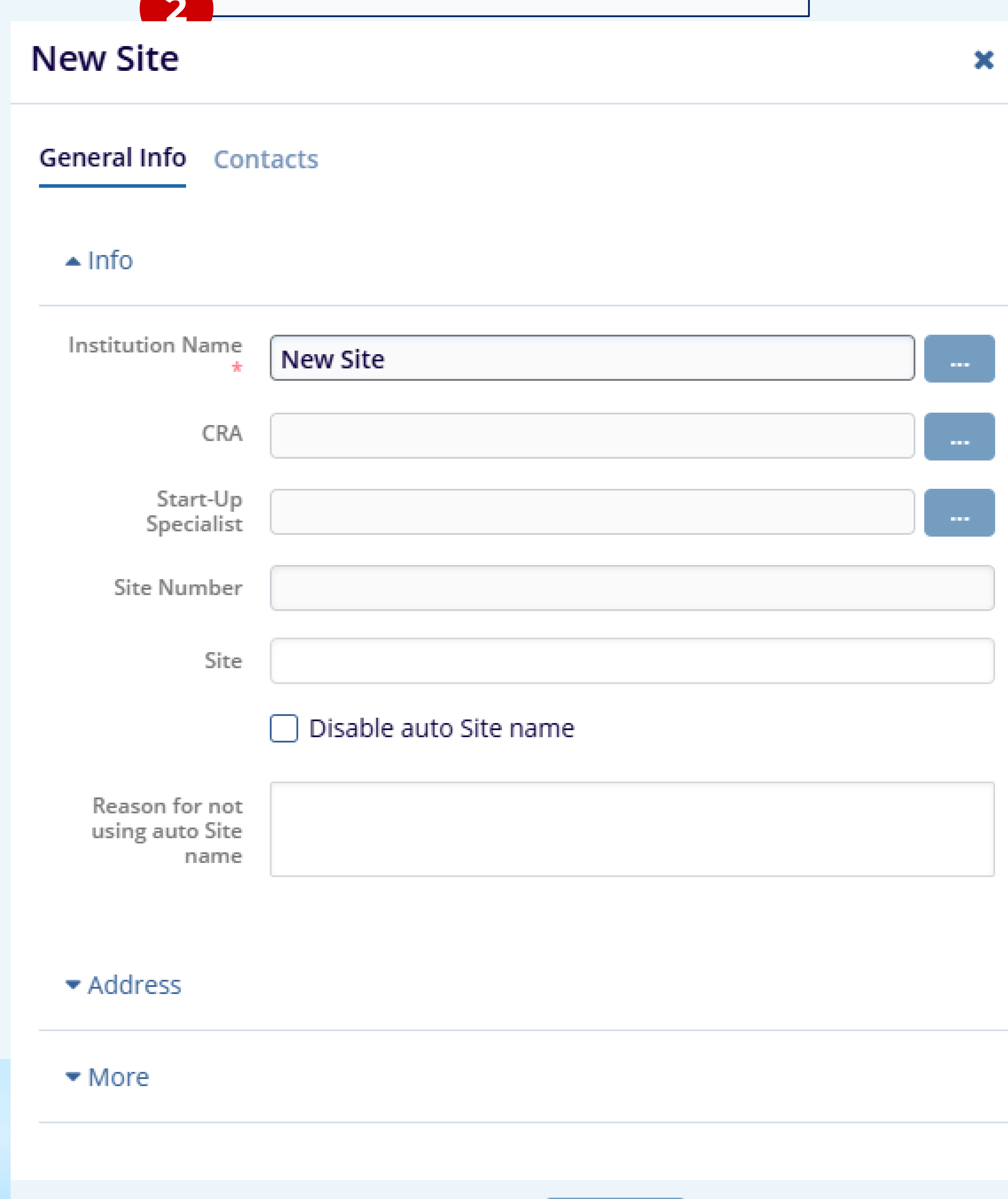


2 Click **Add** above the grid.



3 Complete the required fields for your new **Investigative Site**.

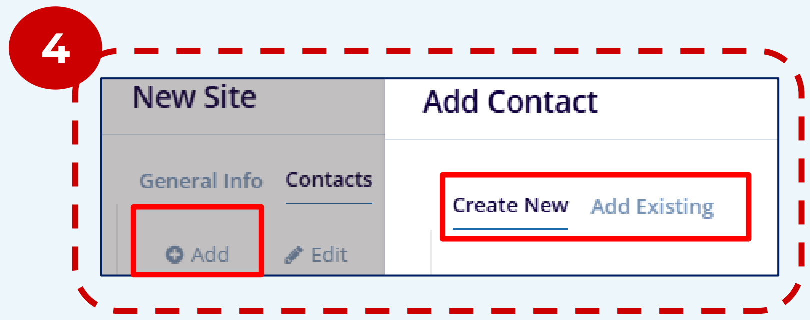
Note: Additional site information fields can be added or modified later.



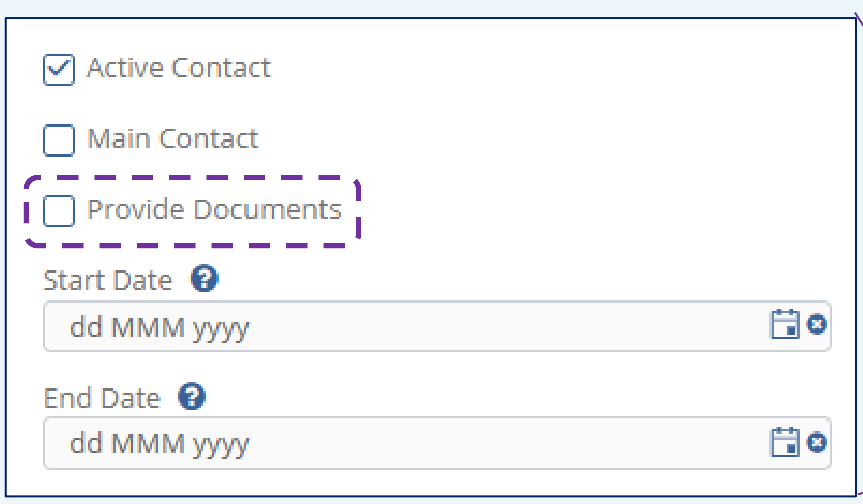
How to Create a Site in eTMF Rooms

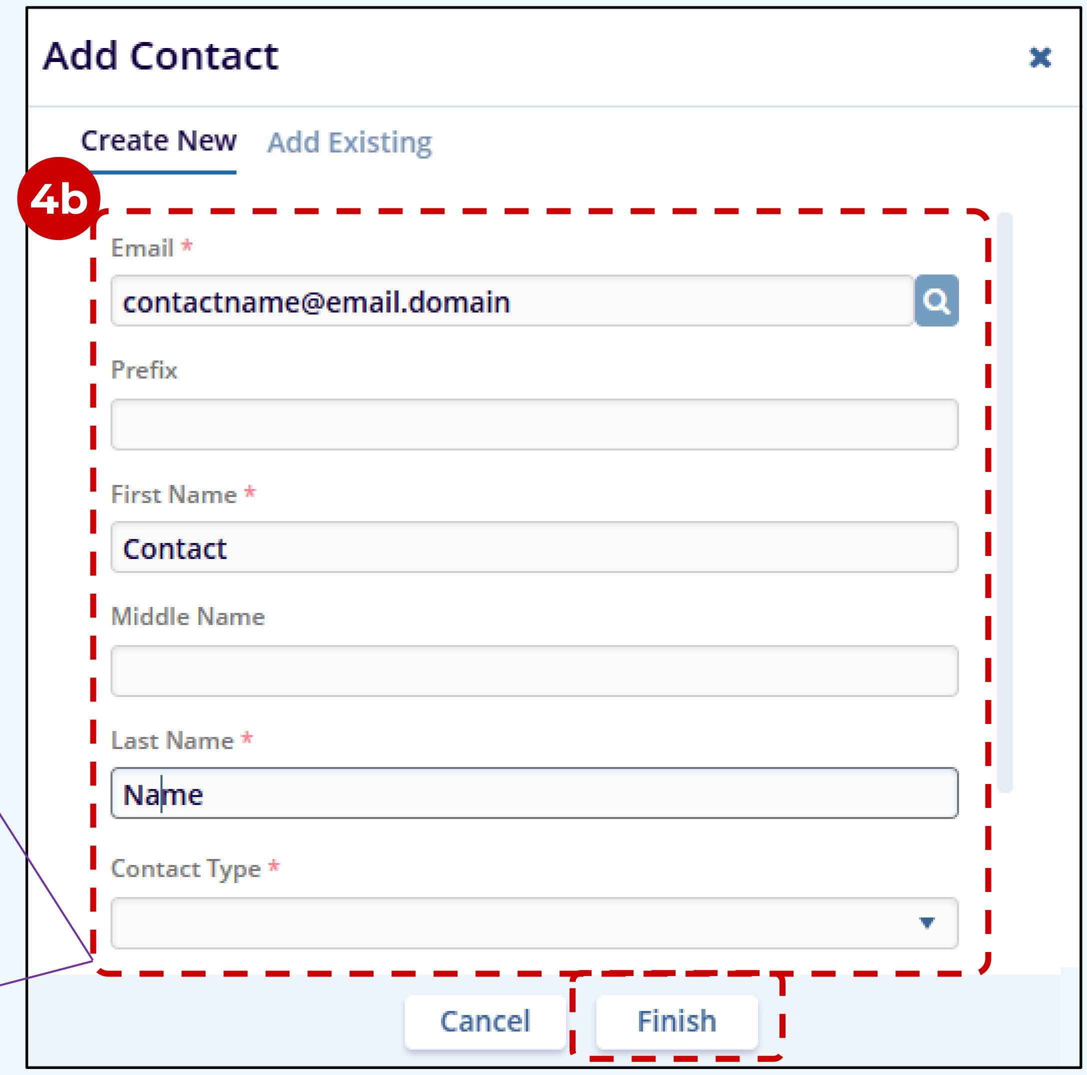
TI version 10.8

4 A **Principal Investigator** must be added in order to create a site.
Click **Add** under the Contacts dashlet, then choose **Create New** or **Add Existing**.

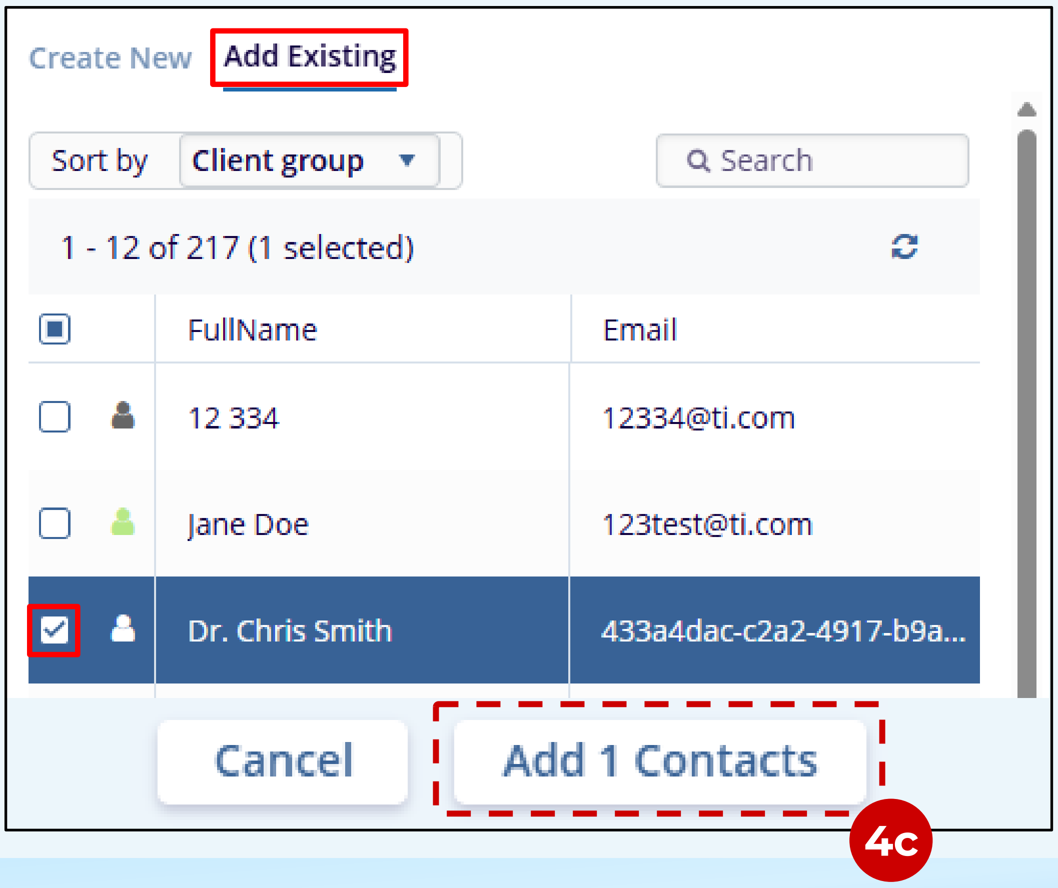


4b If creating a new contact, complete all required fields. [Check **Provide Documents** if essential documents have been assigned to this Contact Type].
Click **Finish** when done.

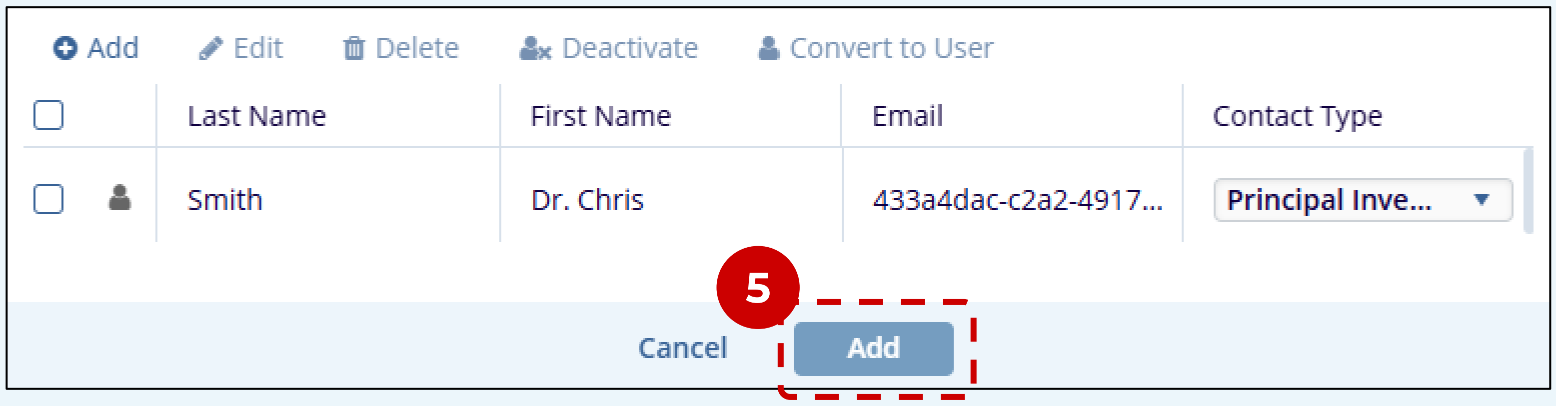




4c Under **Add Existing**, choose from the pool of existing contacts for the room.
Select the contact and click **Add *n* Contacts**.



5 After adding contacts, click **Add** at the bottom of the window to generate the Site.



The new site will appear in the grid under the **Pending** status group.