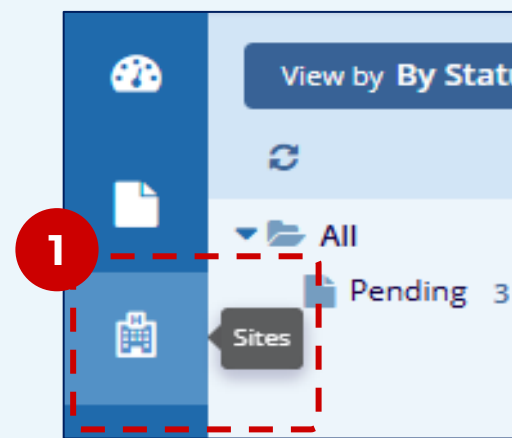


APPLICABLE TO:

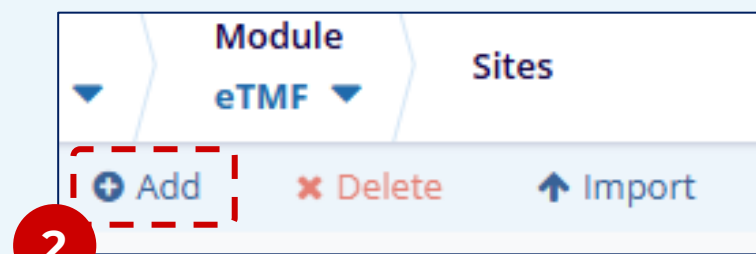
- Admin
 - Manager
 - Editor
 - Reader
- eTMF

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.

New Site

General Info Contacts

▲ Info

Institution Name * ...

CRA ...

Start-Up Specialist ...

Site Number

Site

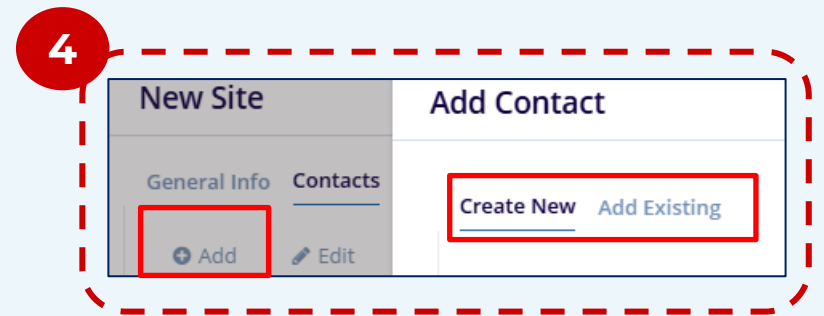
Disable auto Site name

Reason for not using auto Site name

▼ Address

▼ More

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.

4b

Provide Documents

Finish

Active Contact

Main Contact

Provide Documents

Start Date ?
dd MMM yyyy

End Date ?
dd MMM yyyy

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

Add Existing

Sort by Client group

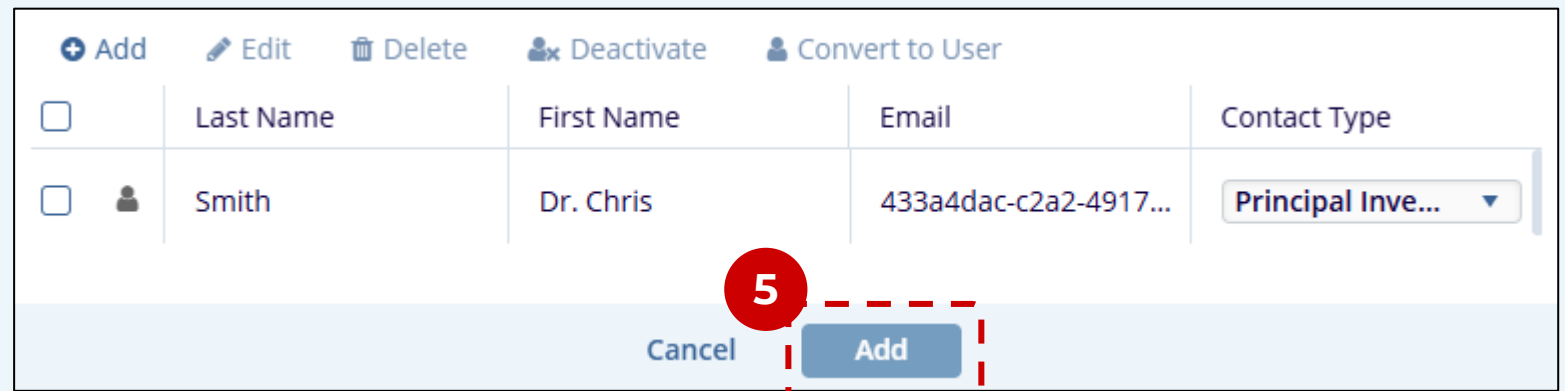
Search

1 - 12 of 217 (1 selected)

	FullName	Email
<input type="checkbox"/>	12 334	12334@ti.com
<input type="checkbox"/>	Jane Doe	123test@ti.com
<input checked="" type="checkbox"/>	Dr. Chris Smith	433a4dac-c2a2-4917-b9a...

Add 1 Contacts

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



A screenshot of a contact management interface. At the top, there are five action buttons: Add, Edit, Delete, Deactivate, and Convert to User. Below these is a table with columns: Last Name, First Name, Email, and Contact Type. The table contains one row with the following data: Last Name: Smith, First Name: Dr. Chris, Email: 433a4dac-c2a2-4917..., Contact Type: Principal Inve... (dropdown menu). At the bottom of the form, there are two buttons: Cancel and Add. The Add button is highlighted with a red dashed box and a red circle containing the number 5.

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

111	New Site		Dr. Chris Smith
-----	----------	--	-----------------