

Configure Document Types for eUpload

Only ad hoc document types can be used in eUpload.

Ad hoc document types must be configured in a specific way to be available in eUpload. An ad hoc document type will be available in eUpload if it:

- Does not have any additional attributes, OR has only the additional attributes of "Subject" and/or "Ref Model Subtype"
- Has the eUpload Item Type setting of "Correspondence" or "Other"
- Is at the study, country, or site level

Important: There can only be one ad hoc document type with an **eUpload Item Type** setting of "Correspondence" or "Other" for a specific TMF Reference Model ID and level.

To alter the configuration of existing document types:

1. From the **More** Menu in eTMF, select **Administration**.
2. Select **Master List Maintenance** from the **Administration** Menu.
3. On the Master List Manager, use filters as needed to locate a specific ad hoc document type.
4. To filter the items in the master list, click the down arrow on a column header. Hover on **Filters** to display a filter field. Enter text or select a filter value as appropriate. For example, click the down arrow on the **Is Ad Hoc** column header, hover on **Filters**, and select the **Yes** check box to narrow down the list of document types to ad hoc only.
5. To sort the items in the master list, click once on the column header to sort values in ascending order. Click

again to sort values in descending order.

6. Double-click on a document type to open the TMF Item Editor.
7. Scroll down to the Additional Attributes grid. Ensure that there are not additional attributes other than Subject and/or Reference Model Subtype. Both are optional.
8. Locate the **eUpload Item Type** field. This field is visible only if **Is Ad-hoc** is set to "Yes."
9. In the **eUpload Item Type** field, click the down arrow and select either "Correspondence" or "Other" from the drop-down. **Note:** Selecting either "Correspondence" or "Other" will enable the document type for use in eUpload. The specific value chosen does not have any bearing on functionality currently but may be used in the future for filtering or some other purpose.
10. Click **Save** at the top of the TMF Item Editor. If another document type in the master list is associated with the same Ref Model ID and level, the system will display an error. Otherwise, the Reason for Change dialog appears.
11. Click the down arrow in the **Reason** field to select one or more reasons for the change.
12. (Optional) Enter additional comments about the change in the **Reason Notes** field.
13. Click **Save**.