SiteVault Quick Reference Guide

I need to upload a new document
This can be done two ways, both will get documents successfully loaded into SiteVault

Create a Document via eBinder

1. Navigate to Documents>eBinder tab
2. Confirm or select the intended study from the study selector
3. Select Upload
4. Select a document to upload from your computer
5. Choose a document type and scroll down to add any document field details *(Document Type Index linked in Getting Help)*
6. Click Save

✅ Document is now ready to be processed for approval

Create a Document via +Create

1. Select +Create>Document
2. Select Upload
3. Drag and Drop files or select files from your computer
4. Choose a document type *(Document Type Index linked in Getting Help section above)*
5. Click Next
6. Populate document field details (yellow fields are required)
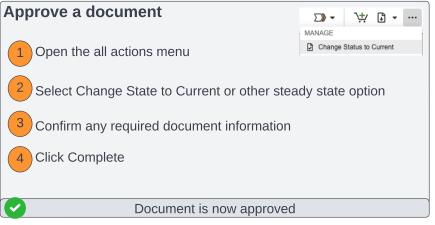7. Click Save

✅ Document is now ready to be processed for approval

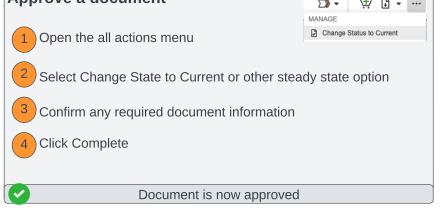## I need to approve a document
Approved document statues can be Approved for Use, Current, Final, Finalized, or Fully Executed

Approve a document

1. Open the all actions menu
2. Select Change State to Current or other steady state option
3. Confirm any required document information
4. Click Complete

✅ Document is now approved

I need to upload a new version of a document
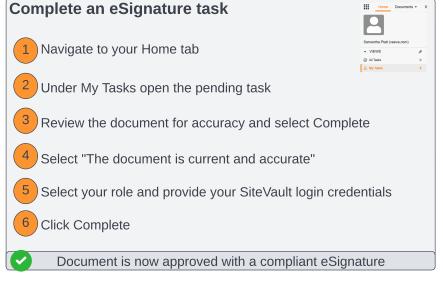*The inital version of the document already exists in SiteVault and needs to be updated*

Upload a new document version

1. Open existing document via the Library or eBinder
2. Open the all actions menu
3. Select Create Draft or Upload New Version, choose the document
4. Click Create (Create Draft) or Upload (Upload New Version)

✅ Document version increments and newest version is available

I need to complete a task i've been assigned
eSignatures are 21CFRPart11 Compliant

Complete an eSignature task

1. Navigate to your Home tab
2. Under My Tasks open the pending task
3. Review the document for accuracy and select Complete
4. Select "The document is current and accurate"
5. Select your role and provide your SiteVault login credentials
6. Click Complete

✅ Document is now approved with a compliant eSignature

I need to approve the Delagation of Authority Log
*Approval of responsibilities will create or update the electronic **delegation of authority log (DOA)***

Complete a delegation of authority task

1. Navigate to your Home tab
2. Under My Tasks open Approve Staff Assignment and Delegations
3. Review the Study Staff Delgations section for accuracy
4. Select Complete and choose Approve (or reject if incorrect)
5. Click Complete

✅ Approved version of the DOA log is now available