



# Getting Started Checklist for Monitors and CRAs

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## Overview

This checklist provides a roadmap to help you get started with SiteVault Free and navigate through help resources available to you. You will learn how to find documents, how to review Source and Regulatory Documents, and learn about resources available to sites. This checklist includes links to instructions and tips and tricks, including written help documentation, video tutorials, and more.

A Getting Started Checklist for Sites [can be found here](#).

If you have any questions, please contact your Study Coordinator or Regulatory Coordinator. For technical support, please contact our support team at [sitevaultsupport@veeva.com](mailto:sitevaultsupport@veeva.com).

## GETTING STARTED

### Log In

For instructions on **logging in and logging out**, visit our [Help page](#).

- If you're a new user, you will receive a **welcome email** with your temporary password and username. If you haven't received this email or are having difficulty logging in, check your spam folder or contact our [Support Team](#).
- If you already have a **Veeva account**, communicate with your site and **provide your email address** to ensure you are added to their SiteVault under your existing Vault username.

### Training for Sites

- Sites can access **self-paced training materials** in our [SiteVault Free Help Documentation](#).

### Finding Documents

For instructions on how to **view documents**, visit our [Help page](#).

- Navigate to the **Documents > Library tab** or **Documents > eBinder tab** to find documents.

## REVIEWING DOCUMENTS

### Steps to Ensure you can View Documents

For instructions on how to **ensure you can view documents**, visit our [Help page](#).

- Ensure the site has **added you as a user**, **assigned you to the study**, and **approved documents** you need to view.

### Reviewing Documents

For instructions on **how to review documents**, visit our [Help page](#).

- Use the **action wheel** to select your review of the outcome. You can select multiple members from the site to assign the feedback task.

## OTHER TABS

### Site Selector

For instructions on how to use the **site selector**, visit our [Help page](#).

- If you have access to multiple sites in SiteVault Free or other Veeva Vault platforms, use the **site selector in the upper right corner** to navigate among **different sites or different Veeva Vaults**.