TRIAL INTERACTIVE

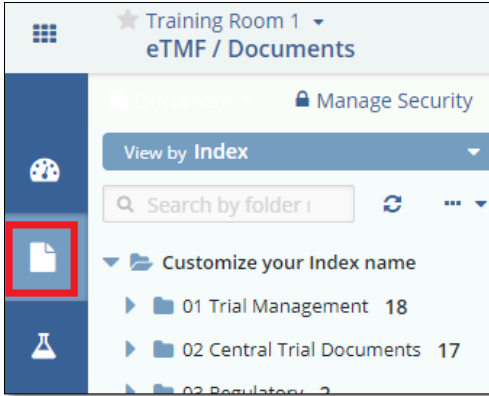# How to Copy a Document to Other Rooms

Applicable to: ☑ Administrators ☑ Editors ☐ Readers ☑ eTMF ☐ Study Start-up

1. Login to a room and navigate to the **eTMF** application from the navigation grid.

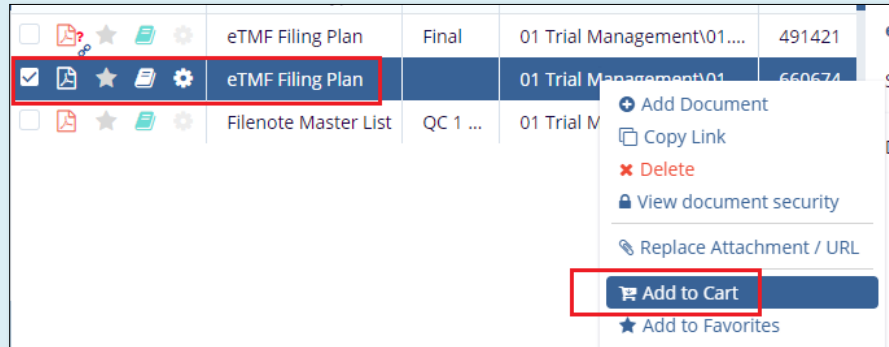2. Navigate to the **Documents** module.

💡 The terms **copy** and **clone** are used interchangeably in this Job Aid.

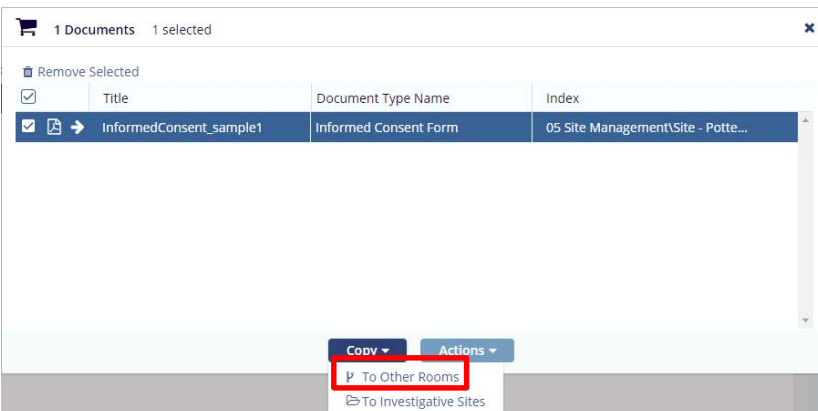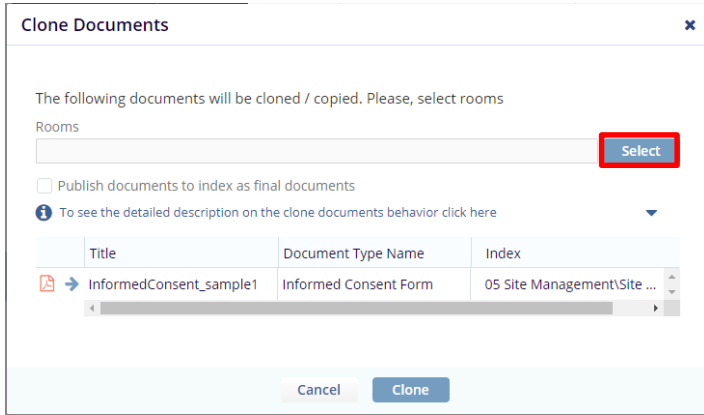3. Locate the document(s) to be copied.

📝 The document does not have to be Final to be copied.

Right-click on the document and select **Add to Cart** or click and Drag the document to the Cart**.**

4. Open the Documents Cart.

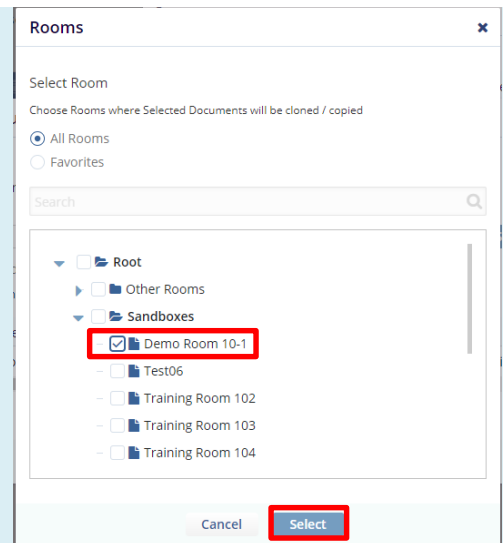- Click **Copy**

- Click **To Other Rooms**

5. Click **Select** to choose the room or rooms to which the document should be copied.

6. Be sure to select a specific site rather than choosing an entire category of sites.
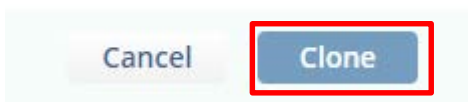
Final documents can be cloned to the Index as a final document.

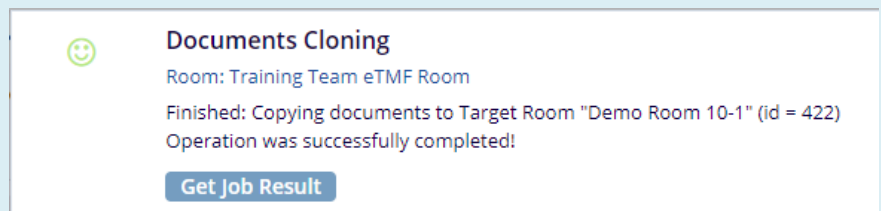Non-Final documents should be cloned and included in the Workflow.

Click **Select**

7. Press **Clone** to copy the document to the chosen room or rooms.

8. A notification will appear when the job has completed processing.

For any additional assistance, click … ❓ Help 📘 Guide