APPLICABLE TO:

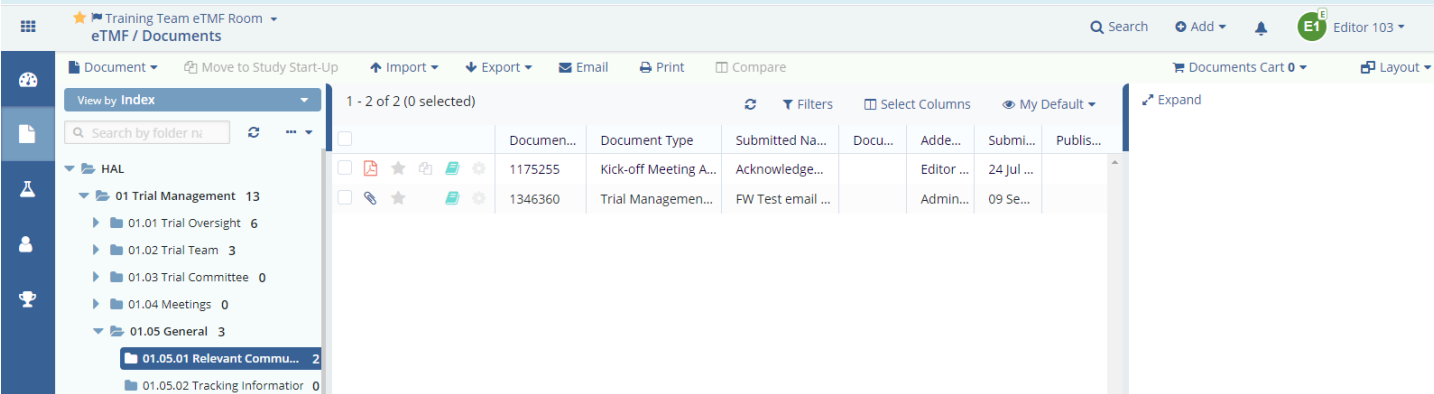☑ Administrators ☑ eTMF

☑ Editors ○ Study Start-Up

○ Readers ○ myTI

Users can drag and drop documents and email messages directly from MS Outlook into the eTMF.

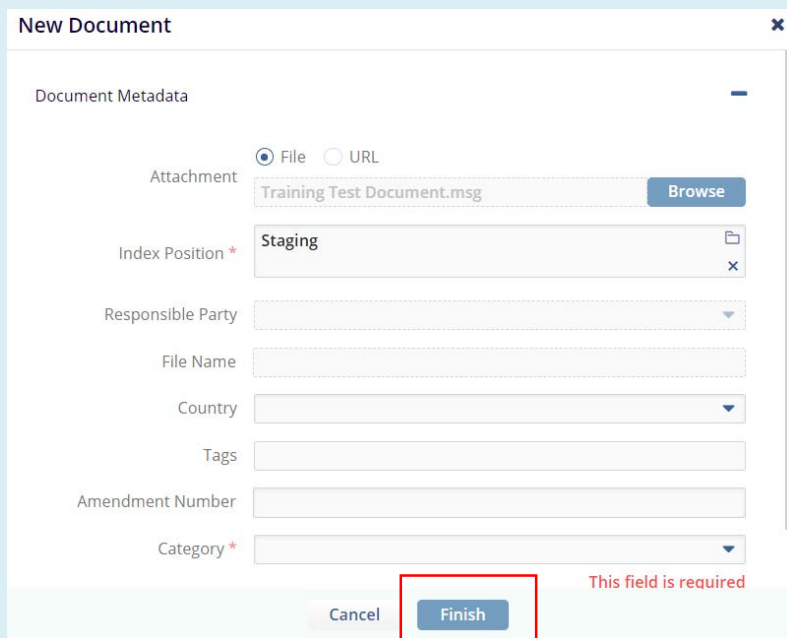Log into the eTMF and enter the Documents Module.

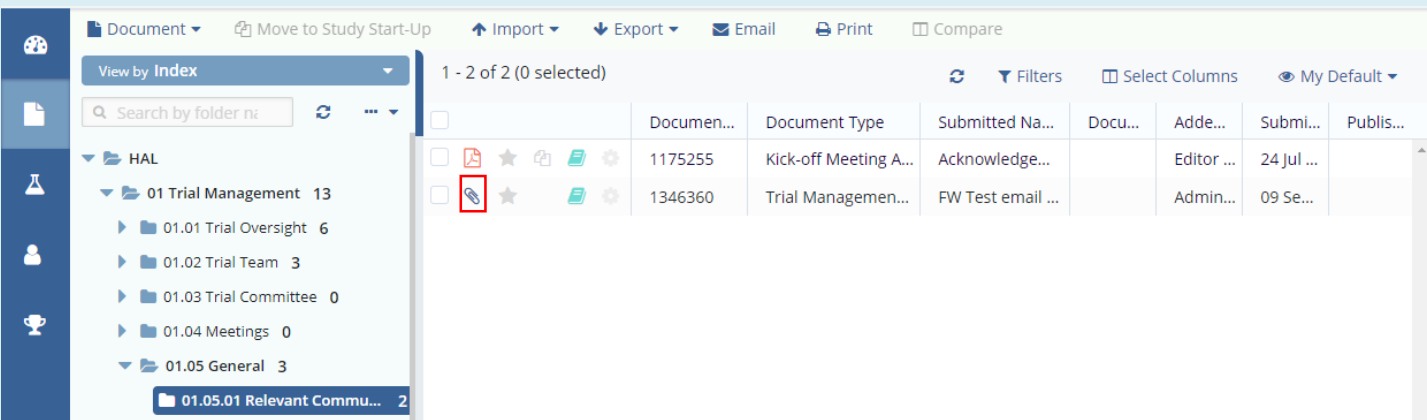Select the folder in which the documents should be stored.

Note: Some browsers may require a plug-in to fully support this feature.

Click and drag the email or document attachment from Outlook into the Document Grid.

Complete the required Metadata Fields marked with an * then click **Finish**.

New Document ✕

Document Metadata —

Attachment   ○ File ○ URL
Training Test Document.msg   Browse

Index Position *   Staging

Responsible Party

File Name

Country

Tags

Amendment Number

Category *

This field is required

Cancel   Finish

The email or document attachment will be indicated by the paperclip icon.

Document ▾   Move to Study Start-Up   ↑ Import ▾   ↓ Export ▾   ✉ Email   🖨 Print   Compare

View by Index

Search by folder na   ⟳   ⋯ ▾

▾ 📁 HAL
  ▾ 📁 01 Trial Management 13
    ▶ 📁 01.01 Trial Oversight 6
    ▶ 📁 01.02 Trial Team 3
    ▶ 📁 01.03 Trial Committee 0
    ▶ 📁 01.04 Meetings 0
    ▾ 📁 01.05 General 3
      📁 01.05.01 Relevant Commu... 2

1 - 2 of 2 (0 selected)   ⟳ ▼ Filters   Select Columns   ◉ My Default ▾

				Documen...	Document Type	Submitted Na...	Docu...	Adde...	Submi...	Publis...
☐	📄	★		1175255	Kick-off Meeting A...	Acknowledge...		Editor ...	24 Jul ...	
☐	📎	★		1346360	Trial Managemen...	FW Test email ...		Admin...	09 Se...	

*Note: We recommend dragging attached documents to the folder separately and linking them to the .msg file for easier reference.