

**APPLICABLE TO:**

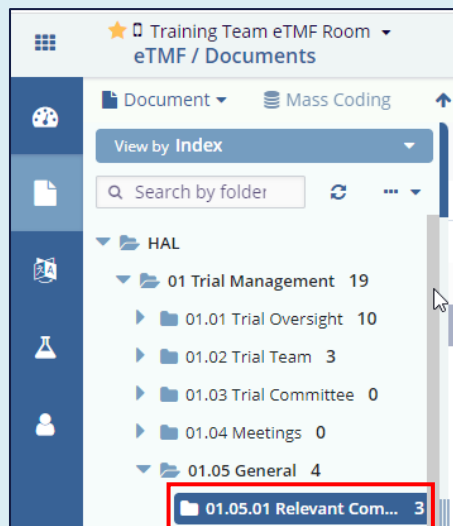
- Administrators
- eTMF
- Room Managers
- Study Start-Up
- Editors
- myTI
- Readers

**Users can drag and drop documents and email messages directly from MS Outlook into their TI eTMF.**

**1. Log into the eTMF and enter the Documents Module.**



**2. Select the folder in which the documents will be stored.**



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

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

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

**New Document** ✕

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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.

Training Team eTMF Room ▾  
eTMF / Documents

Document ▾ Mass Coding Import ▾ Export ▾ Email ▾

View by Index

Search by folder

	Document Id	Document Type	Docum...	Submit...	OCR
<input type="checkbox"/> ...	1175255	Kick-off Meeting Att...		24 Jul 2...	
<input type="checkbox"/> ...	1346360	Trial Management: ...		09 Sep ...	
<input type="checkbox"/> ...	1428026	Trial Management: ...		07 Oct ...	

\*Note: If uploading both a message and its attachment(s), we recommend dragging attached documents to the destination folder separately, and linking them to the .msg file for easier reference (see 'linking documents' in the online user guide).