

APPLICABLE TO:

● All Users

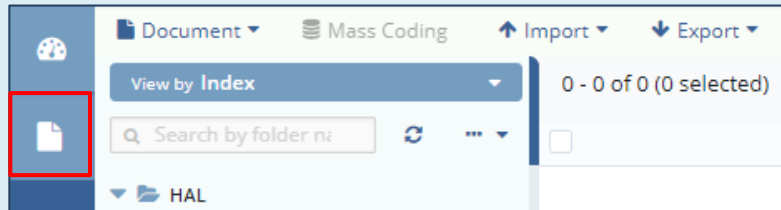
● eTMF

● Study Start-Up

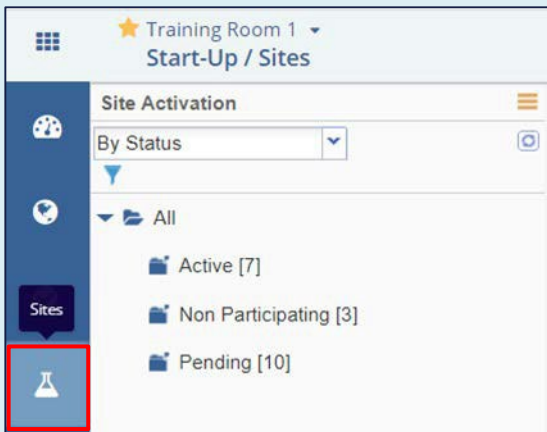


1. Login to a room and navigate to the **eTMF** or **Study Start-Up (SSU)** module from the Navigation Grid on the left.

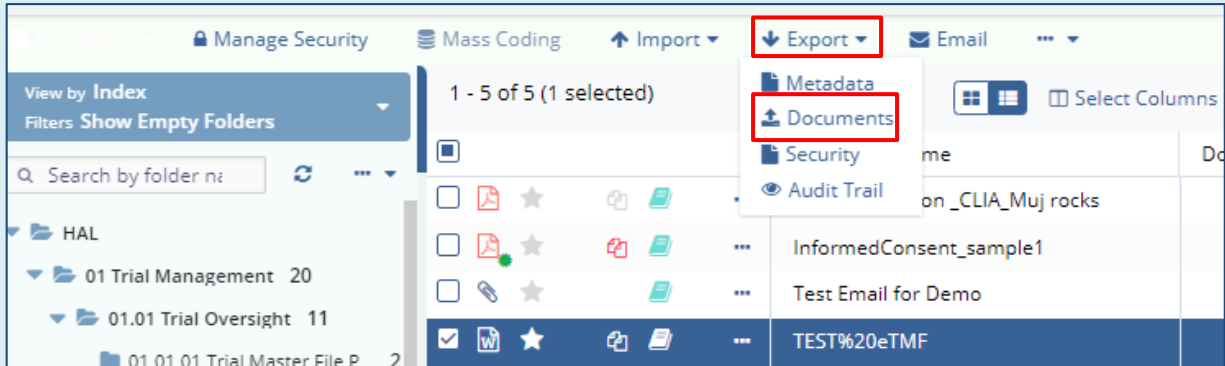
2a. In the **eTMF**, navigate to the **Documents** module.



2b. In **SSU**, navigate to the **Sites** module to access site documents.



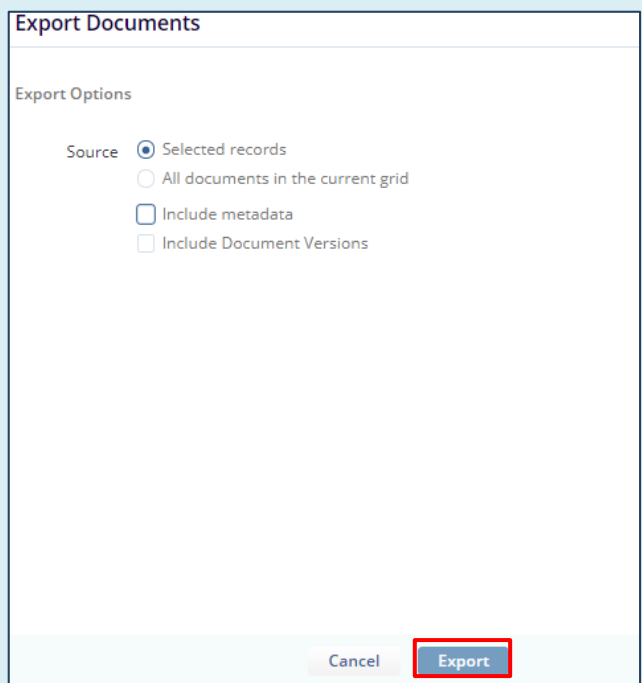
### In the eTMF



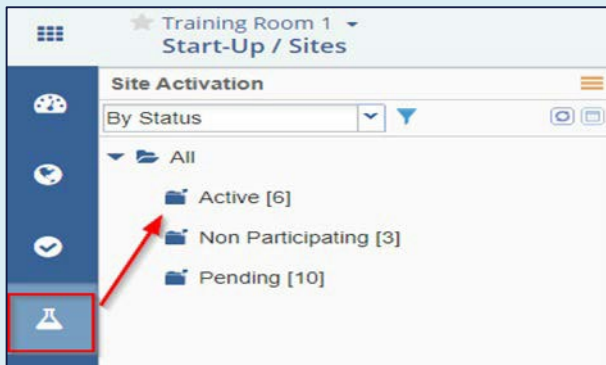
3a. Select the document(s) and then click the **Export** button in the upper actions bar, followed by the **Documents** option.

3b. The *Export Documents* window appears. Select your preferred **Source** and **Metadata** options.

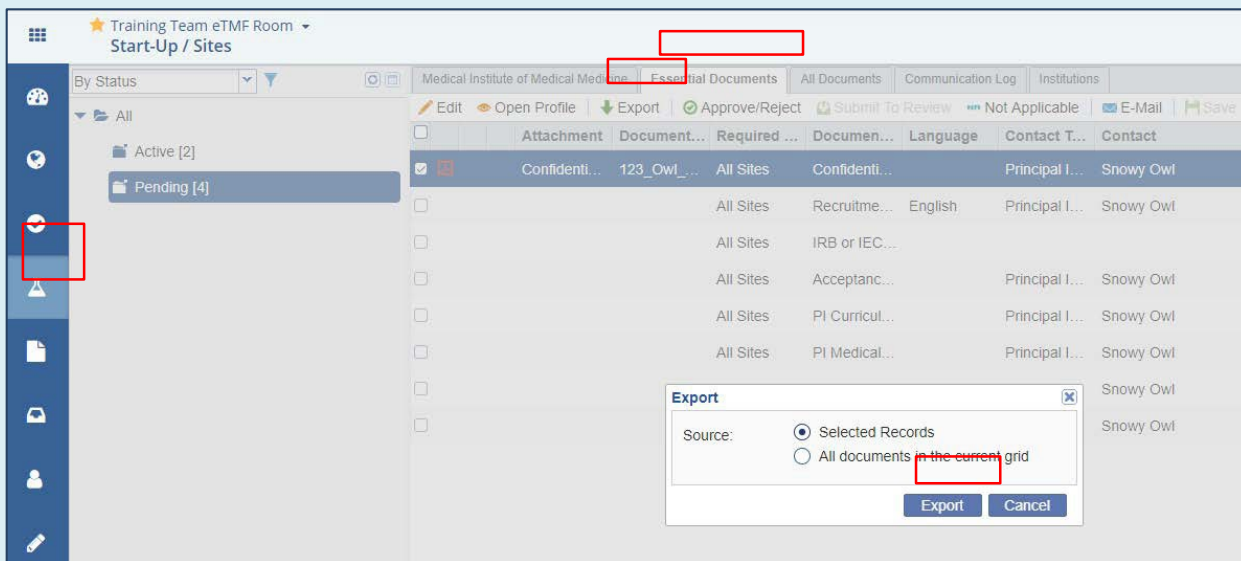
Click **Export** when ready.



**In SSU**



4a. To export documents from SSU, open a site profile and go to the **Essential Documents** tab.



4b. Select the documents to be exported from the documents list and then click the **Export** button.

The Export screen will appear. Choose your preferred Source and click **Export**

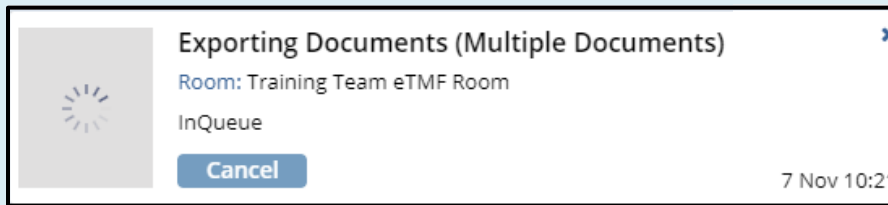
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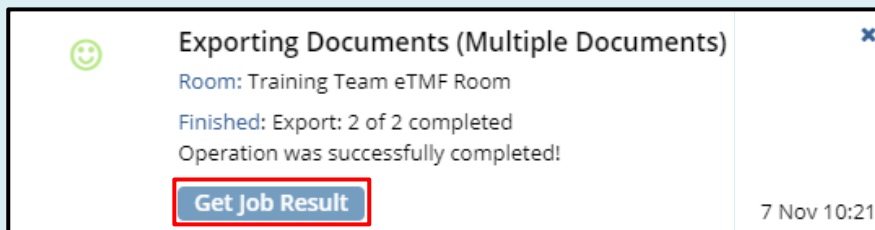
eTMF

Study Start-Up

5. Regardless of chosen location, after clicking the **Export** button, a pop-up notification will alert you as to the progress of the Export action.



6. Once the documents are processed successfully, click on **Get Job Result** to start the download of selected records to your local drive.



Pro Tip: if you miss the instant pop-up, you can still download your documents. Access the Username Menu at the upper right of the page and locate the appropriate notification. Click **Get Job Result** there.

