APPLICABLE TO:

- ● Administrators
- ● Managers
- ● Editors
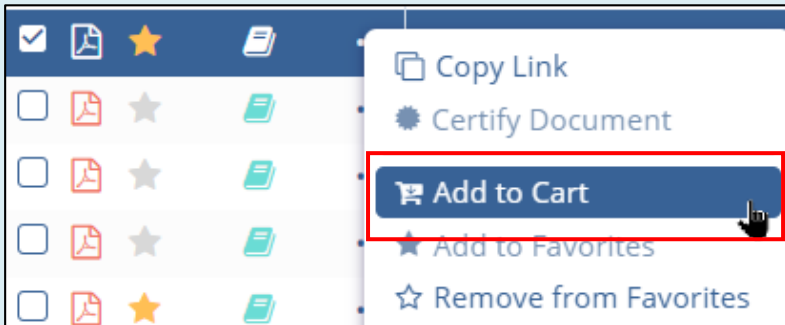- ○ Readers

- ● eTMF
- ○ Study Start-Up
- ○ myTI

1. Login to a room and navigate to the eTMF application from the Navigation Grid.
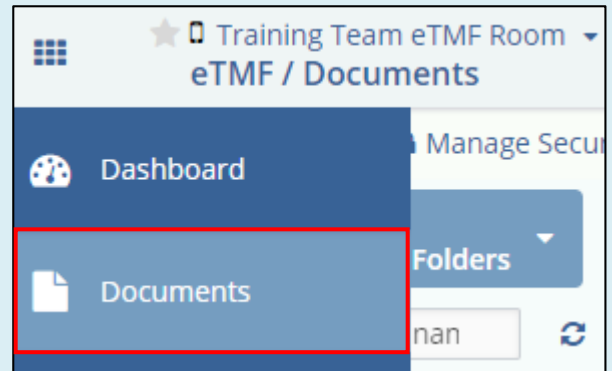
2. Click on the Documents module on the left-side navigation bar.

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

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

4. Click on the three-dotted _document action menu_ and select Add to Cart.

5. Open the Documents Cart (upper right corner of the interface).

Click **Copy/Share,** then select **Copy To Investigative Sites**.

TRIAL INTERACTIVE

Copy Documents to Investigative Sites ✕

Select Investigative Sites

The selected documents will be copied to all sites chosen. Please select the appropriate sites below.

- ⦿ All Sites
- ○ Specific Sites
- ○ By Country

Cancel   **Next**

6. Choose the appropriate site option for distributing the document, and click Next.

In this job aid, we aim to send a copy of the document to All Sites.

7. Select the Folder where you want copies of the document to go, then click Copy.

📝 <u>Final</u> source documents will be cloned to the Index as final documents.

<u>Non-Final</u> documents will be cloned and included in the QC Workflow.

Copy Documents to Investigative Sites ✕

Select Folder

Please select the final destination folder for the copied documents.

🔍 Search...

▼ Index Root
  ▶ 01 Trial Management
  ▼ 02 Central Trial Documents
    ▼ 02.01 Product and Trial Documentation
      02.01.02 Protocol
      02.01.04 Protocol Amendment
      02.01.05 Financial Disclosure Summary

Previous   **Copy**

8. When the job is done, a notification will confirm the cloning was successfully completed.

Notifications 3

All   Background Jobs   Actions   Queries 1

😊 Copy Documents to Investigative Sites
Room: Training Team eTMF Room

Finished
Operation was successfully completed!

Get Job Result

TRANSPERFECT