APPLICABLE TO:

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

- ● eTMF
- ○ Study Start-Up
- ○ myTI

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

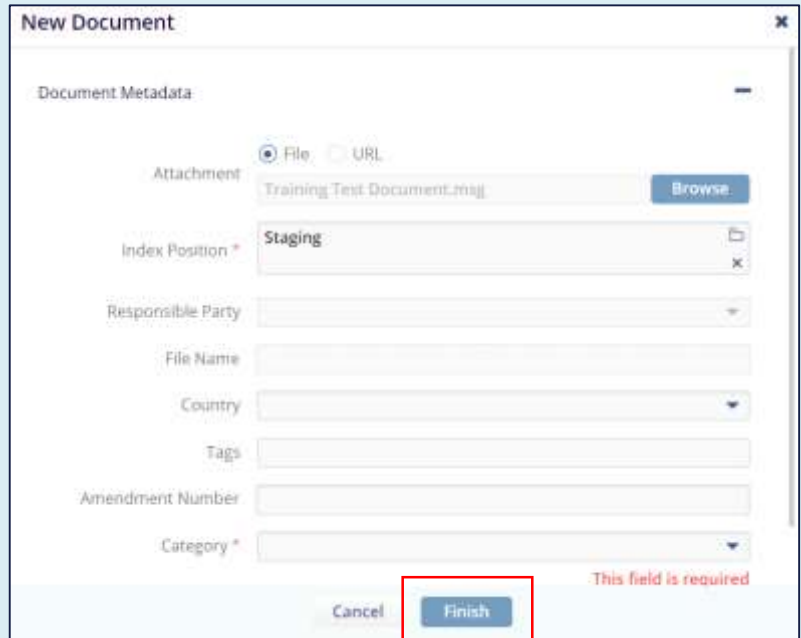1. Log into the eTMF and enter the **Documents** Module.

2. Select the folder in which the documents will be stored.
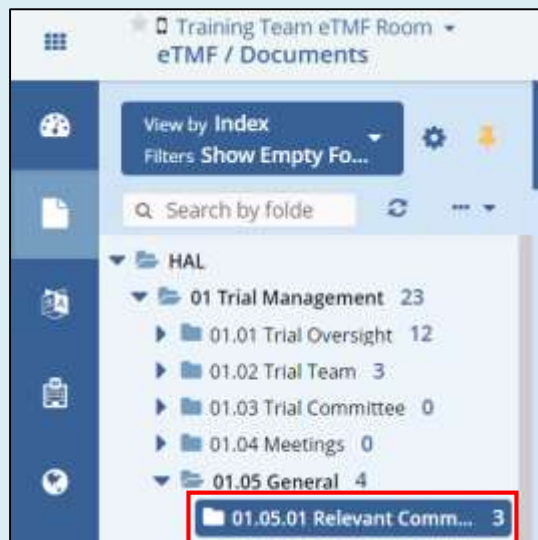
Note: Some browsers may require a plug-in to fully support this feature.

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

Document Metadata

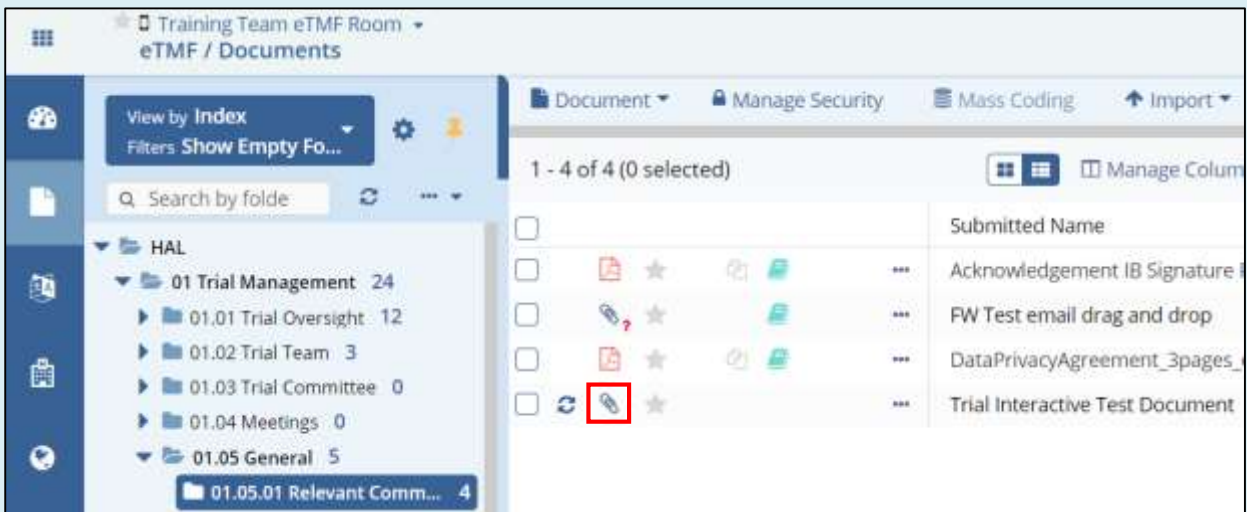|	
Attachment	⦿ File ○ URL
	Training Test Document.msg Browse
Index Position *	Staging
Responsible Party	
File Name	
Country	
Tags	
Amendment Number	
Category *	

This field is required

Cancel   Finish

An email message attachment is indicated by the paperclip icon. Documents are indicated by their respective filetype icon.

Training Team eTMF Room ▾
eTMF / Documents

View by **Index**
Filters **Show Empty Fo...**

🔍 Search by folde

▾ 📁 HAL
  ▾ 📁 01 Trial Management 24
    ▸ 📁 01.01 Trial Oversight 12
    ▸ 📁 01.02 Trial Team 3
    ▸ 📁 01.03 Trial Committee 0
    ▸ 📁 01.04 Meetings 0
  ▾ 📁 01.05 General 5
    📁 01.05.01 Relevant Comm... 4

📄 Document ▾   🔒 Manage Security   ☰ Mass Coding   ⬆ Import ▾

1 - 4 of 4 (0 selected)

Submitted Name

Acknowledgement IB Signature
FW Test email drag and drop
DataPrivacyAgreement_3pages
Trial Interactive Test Document

*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 'related documents' in the online user guide).

TRANSPERFECT