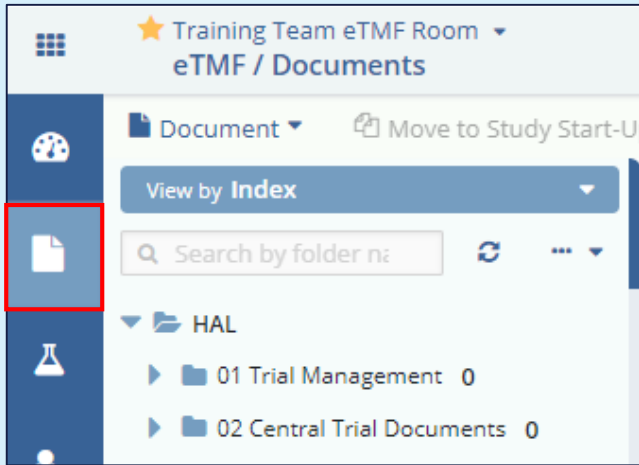


APPLICABLE TO:

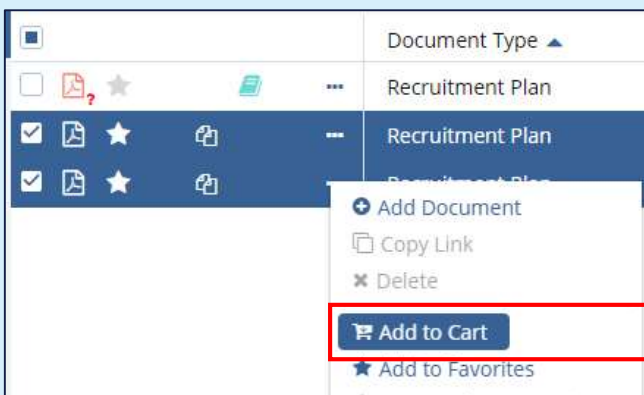
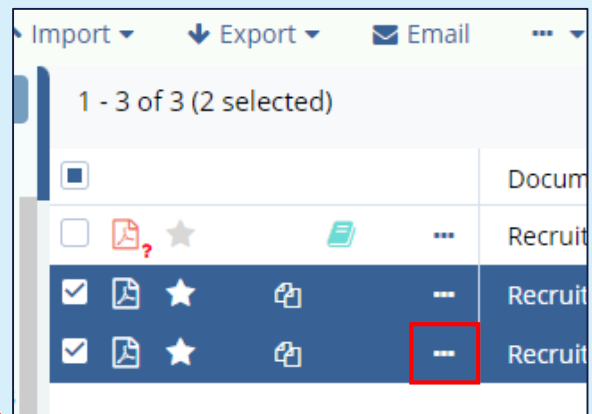
- Administrators
- eTMF
- Room Managers
- Study Start-Up
- Editors
- myTI
- Readers



1. Enter a room and navigate to the **Documents** module in the eTMF.

2. Locate the documents to be merged.

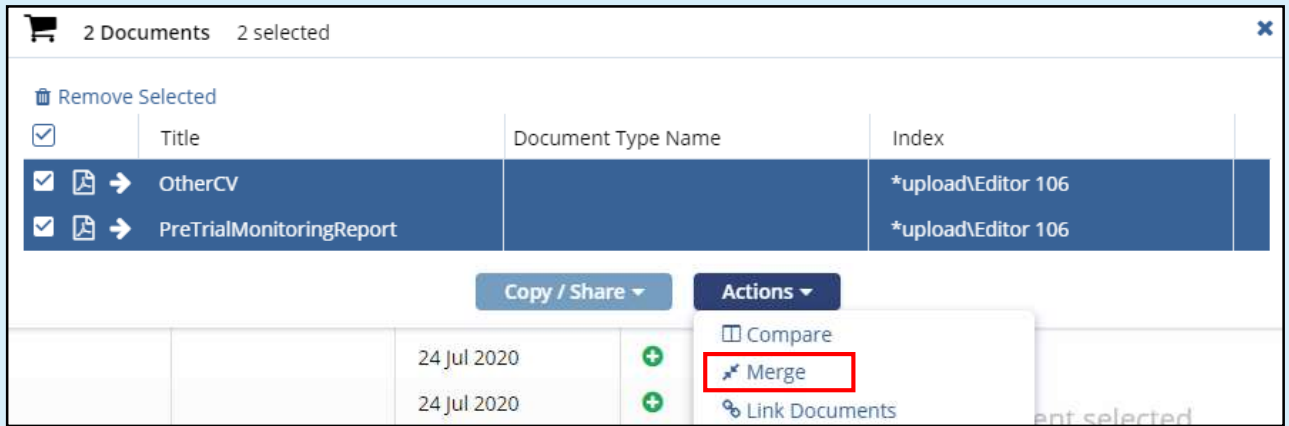
3. Add them to the **Documents Cart** by drag&drop or via the document action menu (shown here).



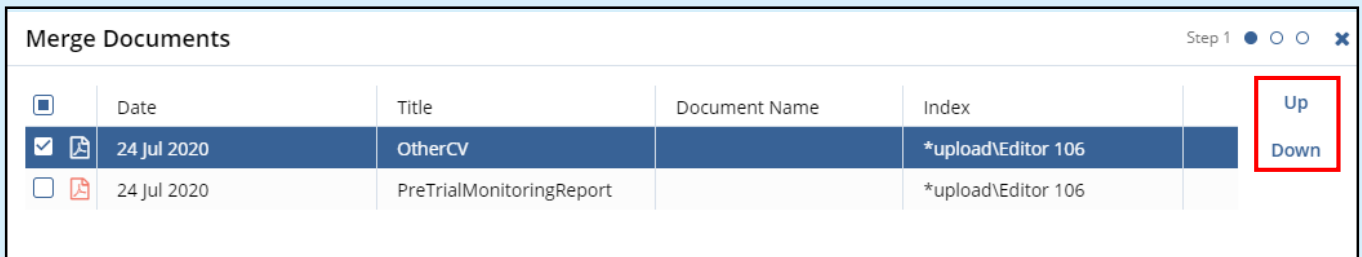
Note: Up to 10 PDF documents can be merged together; documents can be from different folders.

Not all file formats can be merged; an example is Word-like text files.

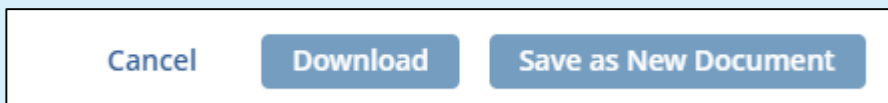
4. Open the **Documents Cart**. Click **Actions** and select **Merge** from the drop-down.



5. In the **Merge Documents** window, reorder the documents if needed, using the **Up** and **Down** buttons.



6. Choose to either **Download** a merged file immediately, or **Save as New Document** in the eTMF.



7. If choosing to **Save as New**, in the next screen users may elect to copy a set of metadata from one of the source documents, to be applied to the new file. They may also mark one or more of the source files for deletion in the eTMF.

If applicable, choose which of the source documents' metadata should be copied to the new document.

New Doc.pdf (New Doc.pdf) ▼

Select which documents, if any, should be deleted as a part of the merge process.

<input type="checkbox"/>	Date	Title	Document Name	Comm
<input type="checkbox"/>	09 Jun 2020	New Doc.pdf	Newsletter_09Jun2020	
<input type="checkbox"/>	17 Jun 2020	PICV	Potter_PICV_Potter_H_17Jun2...	



Note: Some documents may not be eligible for deletion; that is the case when the user does not have access rights to selected document.

8. Complete the required metadata fields for the new file, then click **Finish**.

9. The merged document will be located in the appropriate folder, and be **Available for Review** in the document workflow.

View by By Status ⚙️

- ▼ 2 Step QC Workflow (2)
  - 📁 Final 20
  - 📁 QC 1 Approved 35
  - 📁 Available for Review 479