

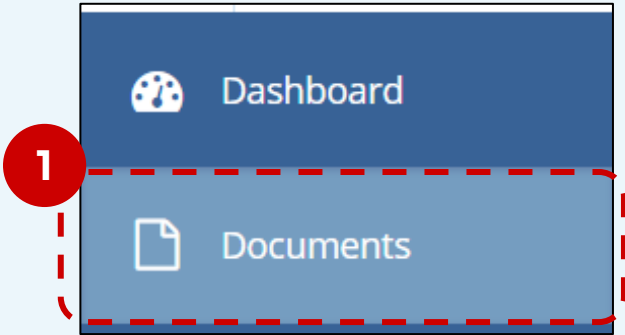
How to Merge Documents

TI version 10.6

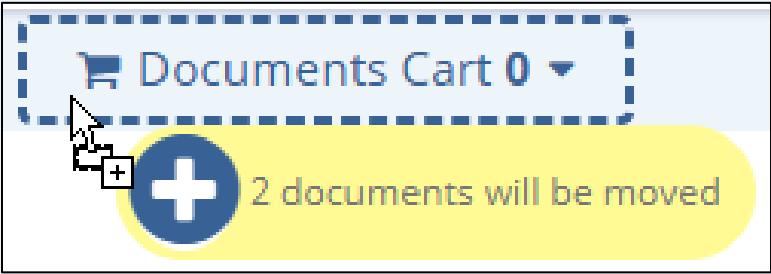
APPLICABLE TO:

- ☒ Admin
 - ☒ Manager
 - ☒ Editor
 - ☐ Reader
- ☒ eTMF

1 Navigate to the **Documents** module.



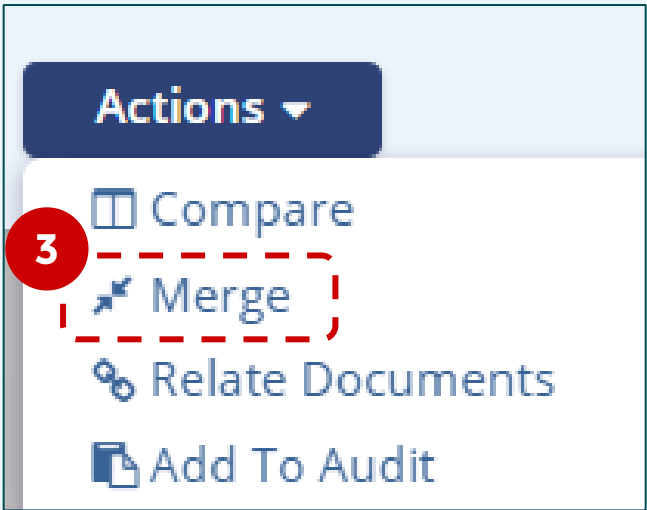
2 Select a minimum of two documents you wish to merge into one, drag them into the **Documents Cart**.



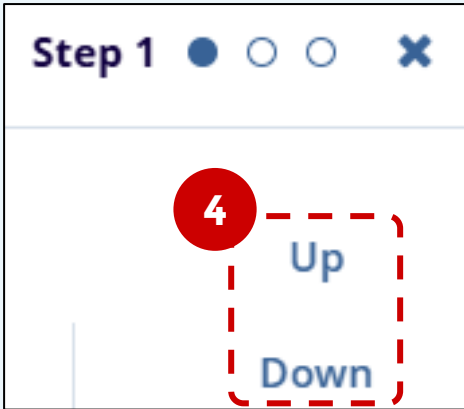
3 In the Documents Cart, expand **Actions** and select **Merge**.



Note: Only PDF, HTML, and certain image formats can be merged. All documents must be the same format when selected. Non-same items will be automatically excluded.



4 Documents will be displayed in the order of selection and this will be maintained in the merged document. If you need to change this order, you can use the **Up** and **Down** buttons on the right.



5 Click **Save as New Document** to move to Step 2.



6 The first dropdown allows the user to select one of the original documents as the source for metadata, accelerating the creation process for the new ‘merged’ document.

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

▼

Dr. H-CV (Dr. H-CV.pdf)

FDA 1572 (FDA 1572.pdf)

the merge process.

7 Some users (depending on their actions and role) may be able to **delete** some or all of the pre-merge documents. This is effected at completion of the merge.

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

0 Columns

| | | | | |
|--------------------------|------|-------|-----------|----------|
| <input type="checkbox"/> | Date | Title | Docume... | Comme... |
|--------------------------|------|-------|-----------|----------|

8 Click Next to enter the final step: metadata review for the new document.

Previous

8 Next

9 Complete the metadata set (this may be pre-filled if you selected a value in step 6 of this Job Aid).

10 Click **Finish**. The new document will be displayed in the Staging folder (subject to room configuration)

Document Type *

Medical Qualification

Select

Submitted Name *

Comments ?

Generated Name

Date Type

Effective Date

Document Date

dd MMM yyyy

Documents merging progress - (100%)

Cancel

10 Finish