

Applicable to: 🗹 Admin 🗹 Editor 🗹 eTMF 🗹 Study Start-up*

*Only Admins can convert outgoing emails within Study Start-Up to site correspondence.

1. Select any document(s) from the grid to email to a study team member. Click the **Email** option from the top menu ribbon.

	3	🖿 Document 🔻 🔒 Manage Security 🛛 🧟		원 Move to Study Start-Up 🔹 🛧 Import 👻		🕈 Export 🔻	Email 🖶 Print 💷 Compare				
		View by Index Filters Show Emp	ty Folders		-	1 - 2 of 2 (1 selecte	d)		e	▼ Filters 🔲 S	elect Columns
		Q Search by fold	ler nam	a			Document Id	Submitted N	Document T	Document St	Submitted On
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Email x Recepter(15) [®] Add Cc.	2. Add recipient(s) by
Subject*	clicking To & CC
% Add Assuments	buttons, add a Subject,
Open Sans v 12 v 4 B I L 6 % A R v E v E v	and a message.
	C C
	Select file to be sent as
	a Link, Attachment, or
	None. Click Send.
Files as Links 🔿 Files as Attachments 💿 None	_

3. Save Conversation popup window opens.

Select Yes, and publish to investigate sites.





T R I A L How to Convert an Outgoing Email to INTERACTIVE Site Correspondence

4. Select a Document type from the pop-up if one opens.

lease select a document type	×
There are multiple document types associated to this folder. Please select a document typ	e.
Seneral\01 Trial Management\Trial Oversight\Trial Master File Plan\eTMF Filing Plan	
Seneral\01 Trial Management\Trial Oversight\Trial Master File Plan\TMF Report	
Seneral\01 Trial Management\Trial Oversight\Trial Master File Plan\TMF Configuration Manual	
Seneral\01 Trial Management\Trial Oversight\Trial Master File Plan\Core Document List	

ocument Metadata				
Category *		•		
		This field is required		
Country		•		
Document Type		٠		
Submitted Name *				
	This field is required			
Comments 🔞				
File Name				
Index				
Generated Name				
Document Date		#		
Submission Date		#		
Approval Date	DD MMM WWW	en.		

5. The Document Profile dialog box will open.

- Under Category select **Investigative Site.**
- Complete all required fields.

Click Finish.

6. Select the applicable sites
(All, Specific, By Country) to
file a copy of the
correspondence.

Clone Documents to Investigative Sites							
Select Investigative Sites Choose investigative sites to where Selected Documents will be cloned to:							
 All Sites Specific Sites By Country 							
	Cancel Next						

Click Next.



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T R I A L How to Convert an Outgoing Email to INTERACTIVE Site Correspondence

Clone	Documents	to Investigative	e Sites	×			
Select s	specific sites				7. Select the site(s) to clone the		
Q Sea					correspondence		
23 Site	es 0 Selected				correspondence.		
	Site Number	Principal Inves	Institution Na	Country Name			
	101	David Hamilton	101 Hamilton	Hungary			
	530	Cold Hydration	530 Hydration	_	Click the dropdown from each		
	205	Poorva Kumar	205 Kumar	United States	column to arrange the order of		
	998	Mickey Mouse	998 Mouse	United States	the list.		
	250	John A. Sample	250 Sample	United States	998 II Sort Ascending		
	201	Momenta Pl	201 PI	Spain	250 J. Sort Descending		
	111	Stephanie Svo	111 Svoboda	United States			
	1011	Minnie Mouse	1011 Mouse	United States	Columns ,		
	107	Break Glass	107 Glass	United States 👻	Click Novt		
		Previous	Next		CHER WERL.		
Clone	Document	s to Investigat	ive Sites	×			
Calaati	Talalaa						
Select I	Folder	:	d				
Please, si	elect folder to wr	lich documents will be	cioned		8. Select the folder to where the correspondence will be filed.		
Q Sea							
🕶 Index	x Root						
05.01 Site Selection							
05.	.02 Site Set-up	Documentation					
05.	.03 Site Initiatio	on 					
 05. 05. 	.04 Site Manag	ement					
V 05.	05.05.01 Relev	ant Communicatio	ons				
Previous					Click Clone.		
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	Clone D	ocuments to	Investigativ	e Sites			
\bigcirc	Room: Tra	aining Room 1	mvestigativ	e sites	9. A notification of process completion		
	Finished				will appear		
	Operation	n was successfull	ly completed!		will appear.		
	Get Job	Result					
	• -	1					
		ne docum	ients are r	outed to th	e worknow lo		
	b	e coded a	nd review	/ed.			

For any additional

assistance, click ... 🔞 Help

📕 Guide



