

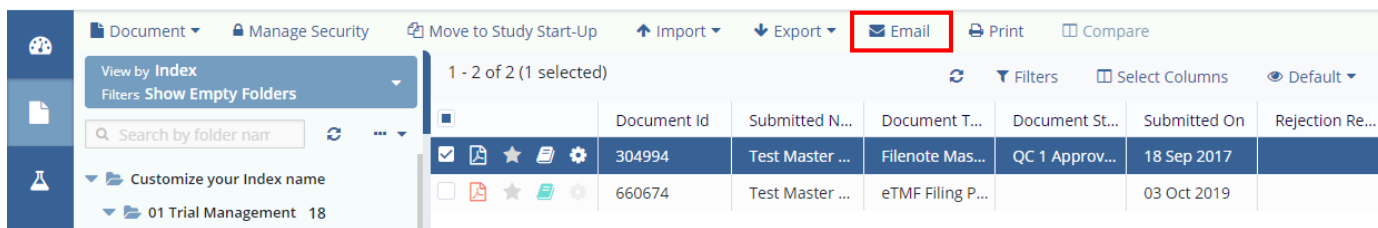


Applicable to: Admin Editor eTMF Study Start-up*



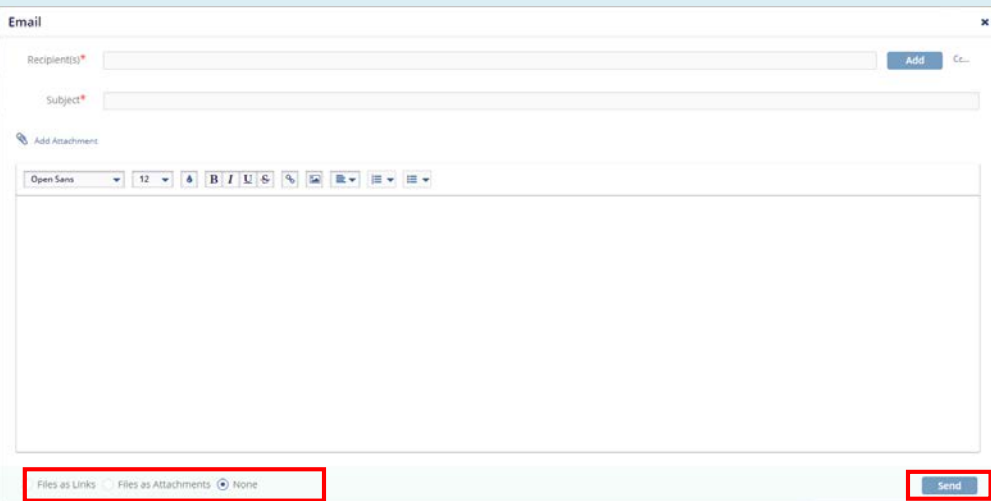
*Only Admins can convert outgoing emails within Study Start-Up to site correspondence.

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



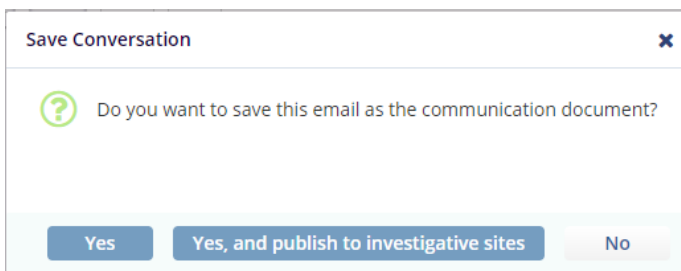
2. Add recipient(s) by clicking To & CC buttons, add a **Subject**, and a message.

Select file to be sent as a Link, Attachment, or None. Click **Send**.



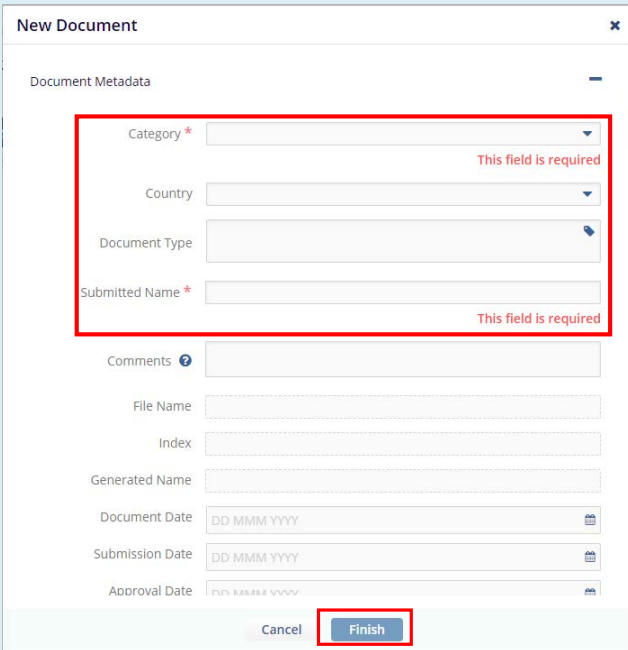
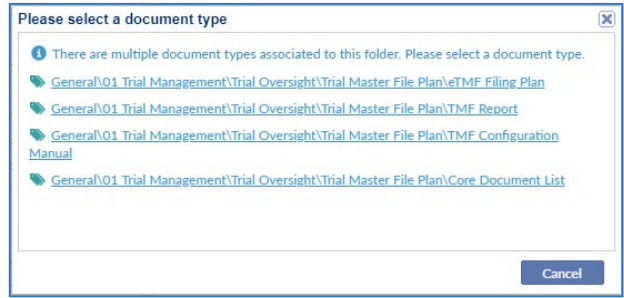
3. **Save Conversation** pop-up window opens.

Select **Yes**, and **publish to investigative sites**.



The outgoing email will be saved as PDF document and will be published to the investigative sites.

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

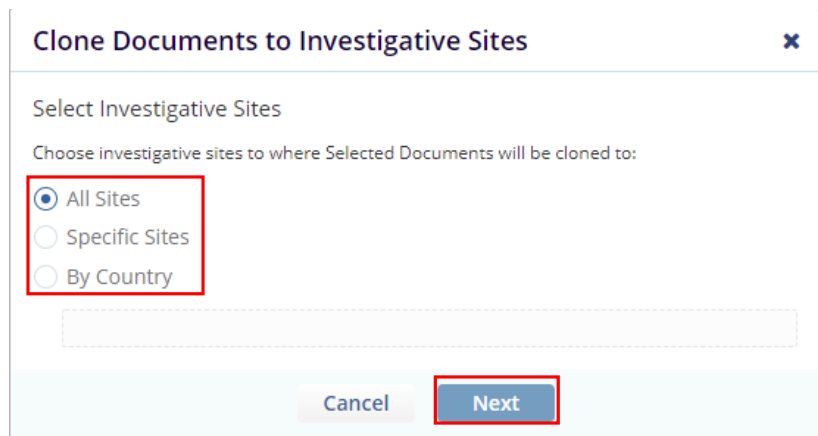


5. The **Document Profile** dialog box will open.

- 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.



Click **Next**.



If **All Sites** or **By Country** is selected, skip to step 8.

Clone Documents to Investigative Sites

Select specific sites

Search...

23 Sites 0 Selected

<input type="checkbox"/>	Site Number	Principal Inves...	Institution Na...	Country Name
<input type="checkbox"/>	101	David Hamilton	101 Hamilton	Hungary
<input type="checkbox"/>	530	Cold Hydration	530 Hydration	
<input type="checkbox"/>	205	Poorva Kumar	205 Kumar	United States
<input type="checkbox"/>	998	Mickey Mouse	998 Mouse	United States
<input type="checkbox"/>	250	John A. Sample	250 Sample	United States
<input type="checkbox"/>	201	Momenta PI	201 PI	Spain
<input type="checkbox"/>	111	Stephanie Svo...	111 Svoboda	United States
<input type="checkbox"/>	1011	Minnie Mouse	1011 Mouse	United States
<input type="checkbox"/>	107	Break Glass	107 Glass	United States

Previous **Next**

7. Select the site(s) to clone the correspondence.



Click the dropdown from each column to arrange the order of the list.

<input type="checkbox"/>	Site #	Principal Investigator
<input type="checkbox"/>	998	Sort Ascending
<input type="checkbox"/>	250	Sort Descending
<input type="checkbox"/>	201	Columns

Click **Next**.

Clone Documents to Investigative Sites

Select Folder

Please, select folder to which documents will be cloned

Search...

- Index Root
 - 05.01 Site Selection
 - 05.02 Site Set-up Documentation
 - 05.03 Site Initiation
 - 05.04 Site Management
 - 05.05 General
 - 05.05.01 Relevant Communications

Previous **Clone**

8. Select the folder to where the correspondence will be filed.

Click **Clone**.



Clone Documents to Investigative Sites

Room: Training Room 1

Finished

Operation was successfully completed!

[Get Job Result](#)

9. A notification of process completion will appear.



The documents are routed to the **Workflow** to be coded and reviewed.

For any additional assistance, click ...

[Help](#)

[Guide](#)