TRIAL INTERACTIVE

APPLICABLE TO:

- ● Administrators
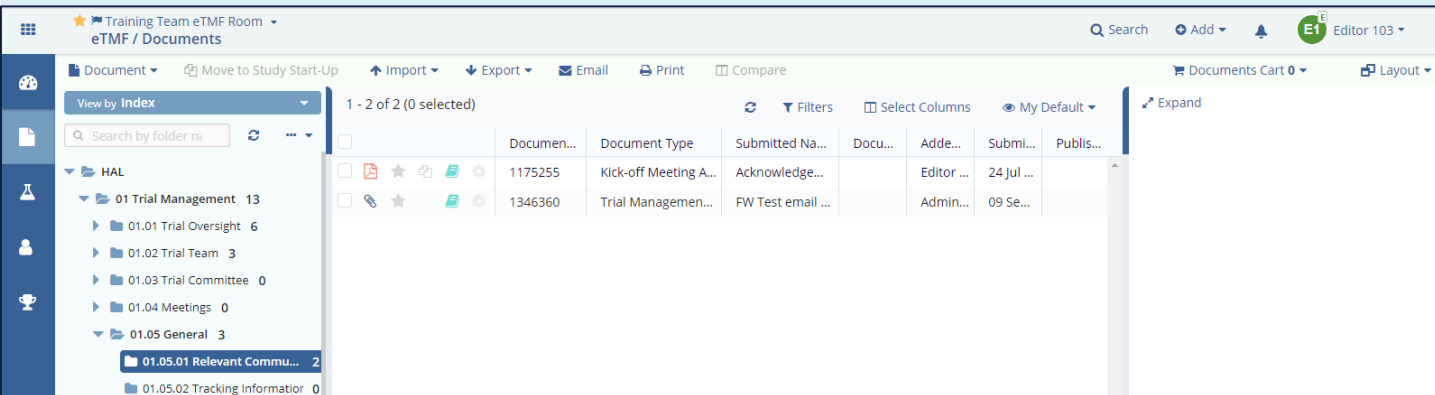- ● Editors
- ○ Readers
- ● eTMF
- ○ Study Start-Up
- ○ myTI

Users can drag and drop documents and email messages directly from MS Outlook into the eTMF.
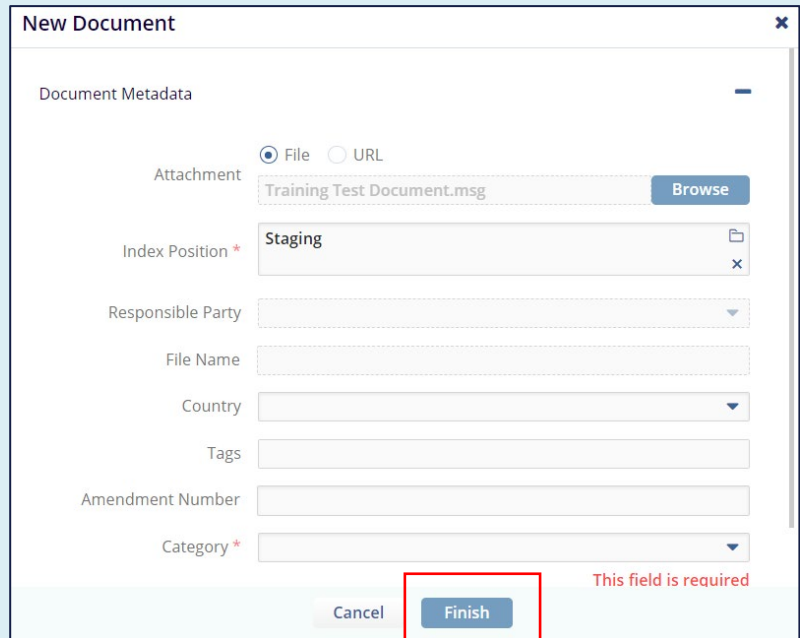
1. Log into the eTMF and enter the Documents Module.

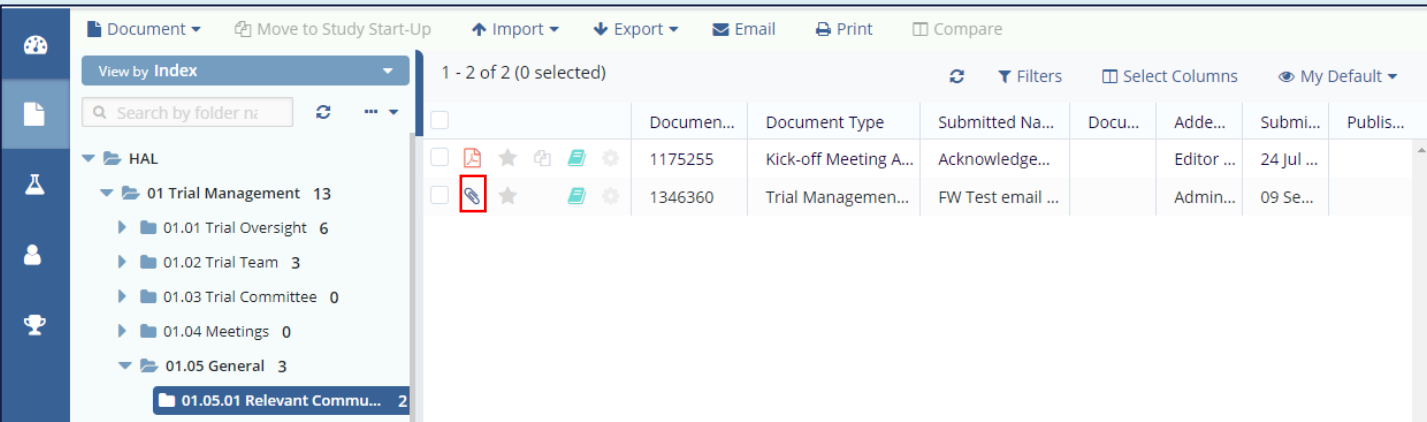2. Select the folder in which the documents should be stored.

Note: Some browsers may require a plug-in to fully support this feature.

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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**

The email or document attachment will be indicated by the paperclip icon.

*Note: We recommend dragging attached documents to the folder separately and linking them to the .msg file for easier reference.

TRANSPERFECT