

APPLICABLE TO:

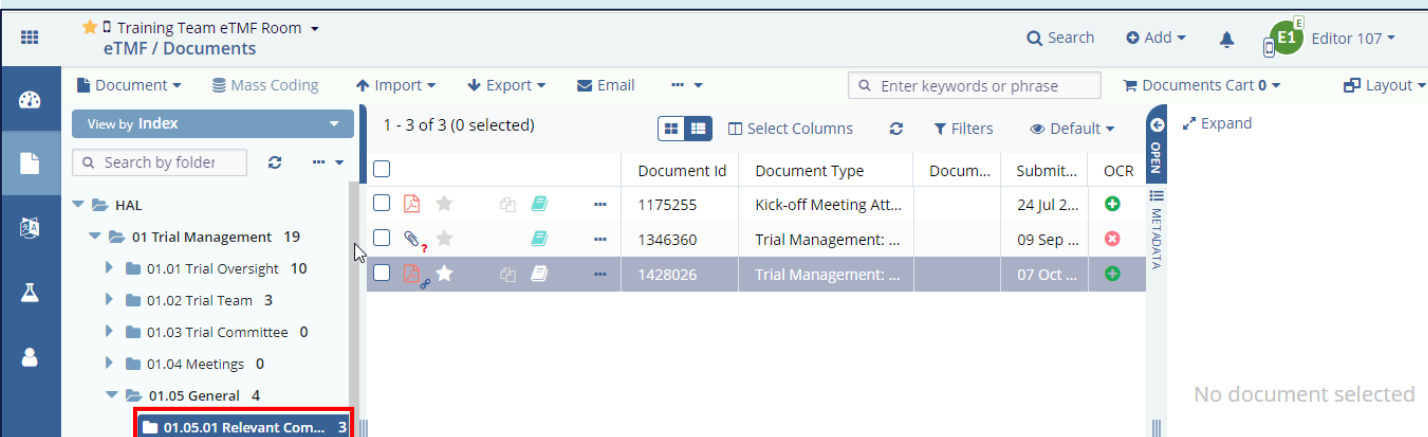
- Administrators
- eTMF
- Room Managers
- Study Start-Up
- Editors
- myTI
- Readers

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.

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 [Dropdown]

File Name [Text Field]

Country [Dropdown]

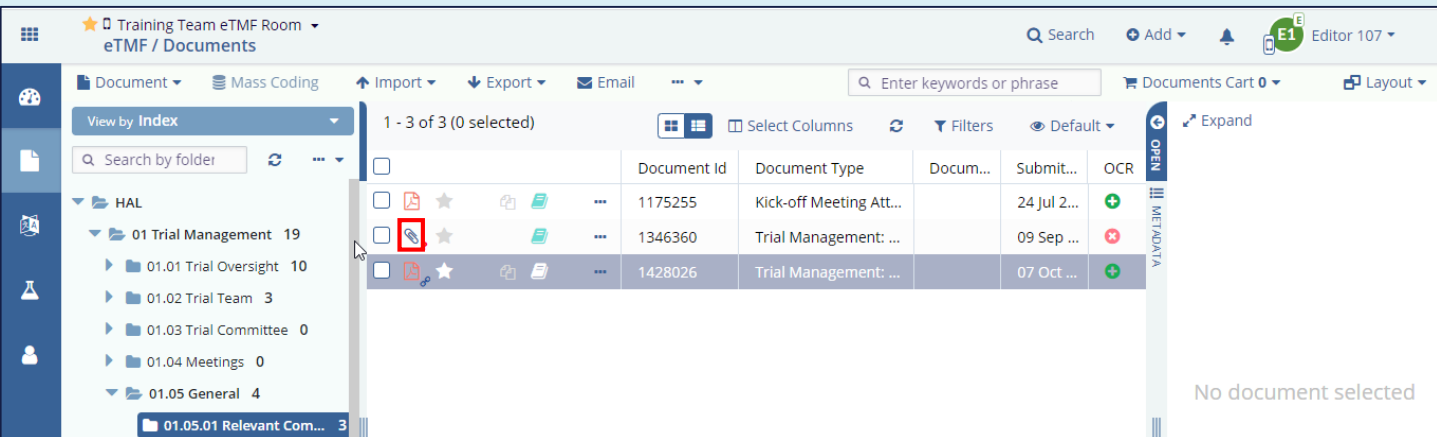
Tags [Text Field]

Amendment Number [Text Field]

Category * [Dropdown] 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.