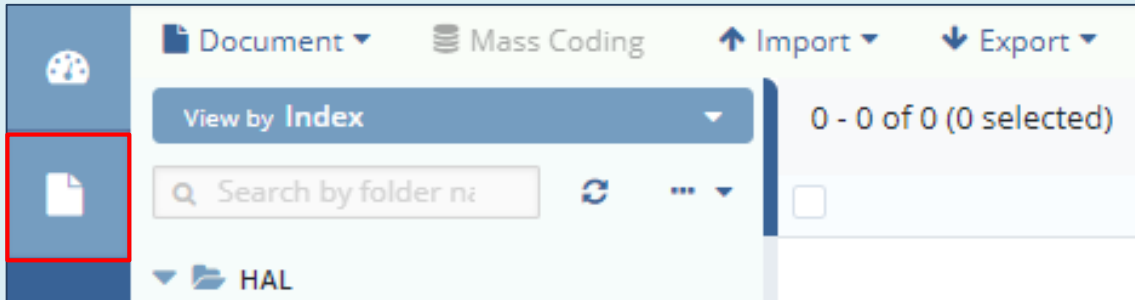


APPLICABLE TO:

 All Users eTMF Study Start-Up

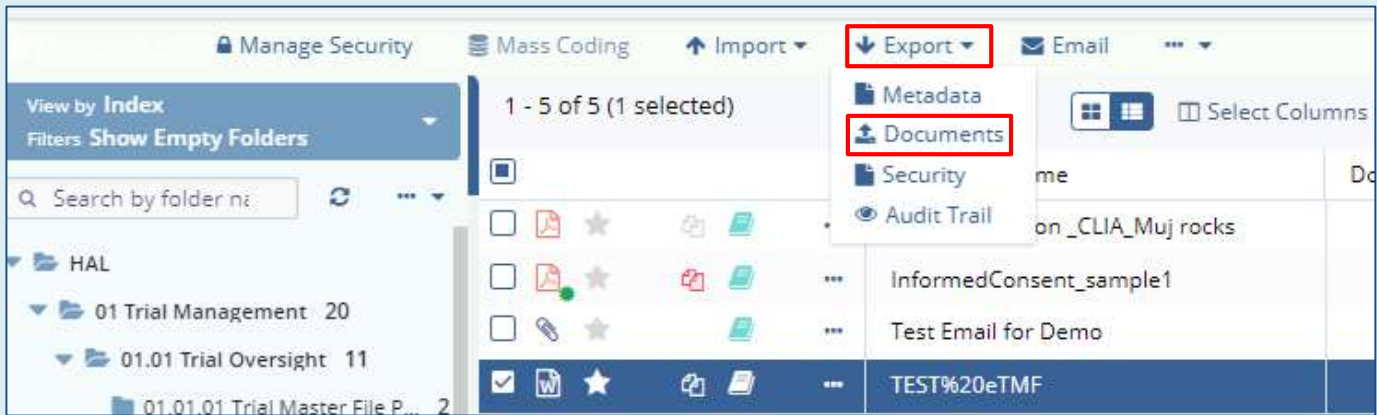
1. Login to a room and navigate to the **eTMF** or **Study Start-Up (SSU)** module from the Navigation Grid on the left.

2. Navigate to the **Documents** module.



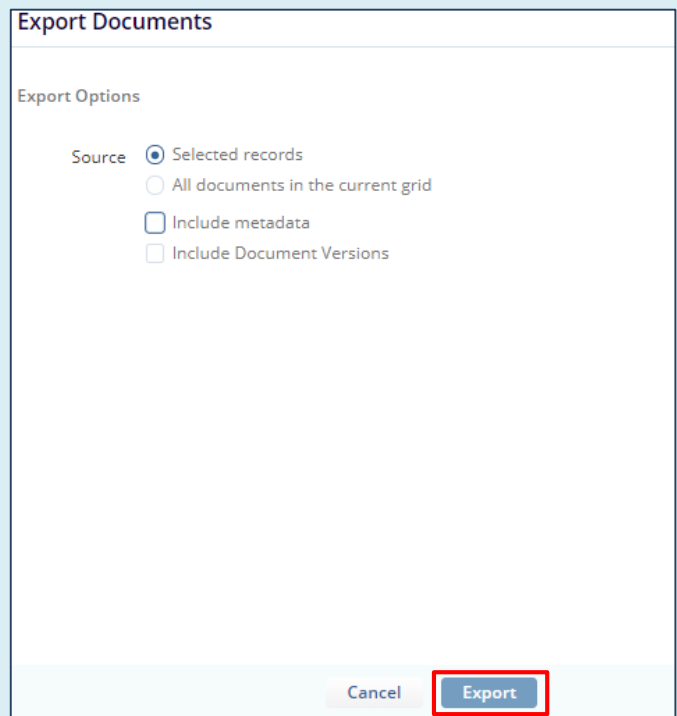
In eTMF

3a. Select the document(s) and then click the **Export** button in the upper actions bar, followed by the **Documents** option.



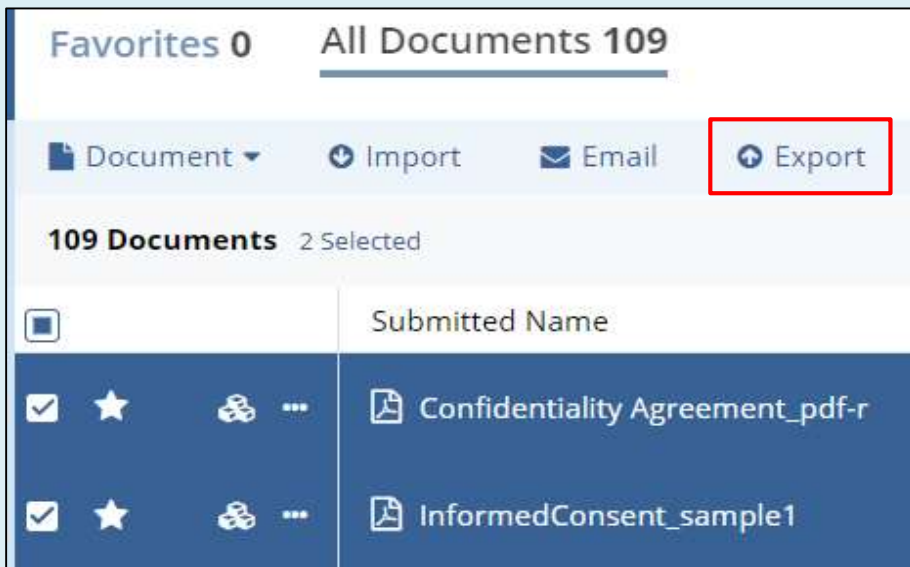
3b. The *Export Documents* window appears. Select your preferred **Source** and **Metadata** options.

Click **Export** when ready.

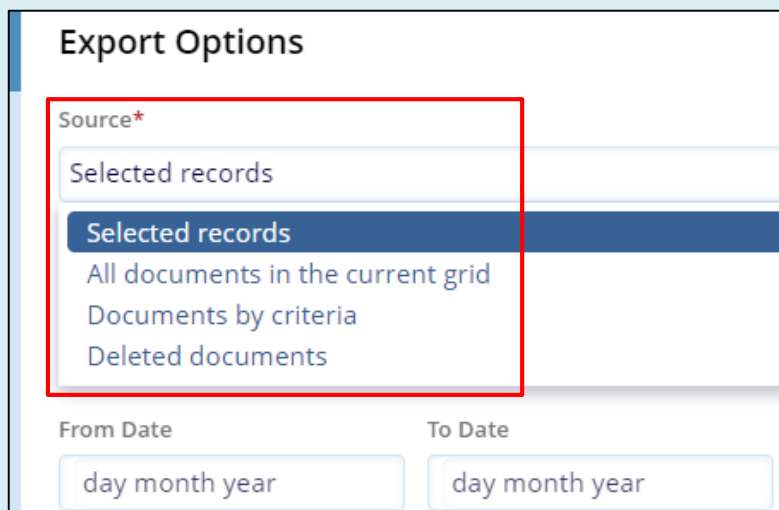


In SSU

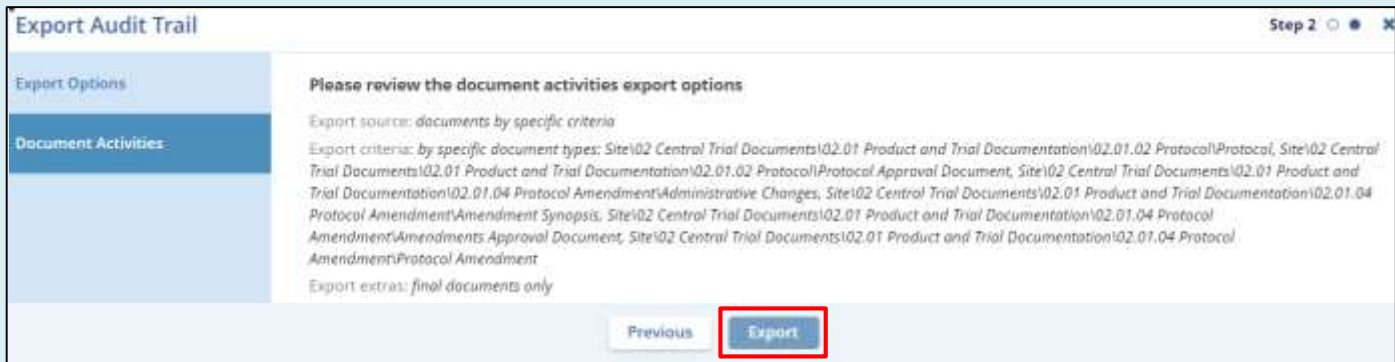
4a. Select the documents to be exported from the documents list and then click the **Export** button.



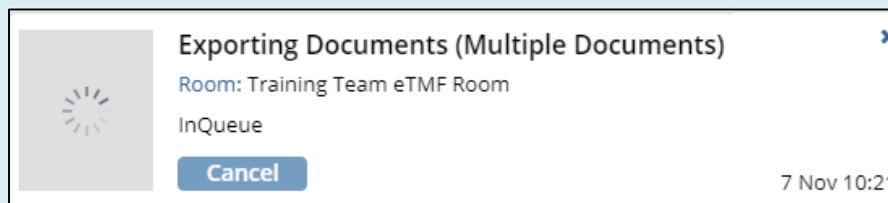
4b. The Export Options screen will appear. Choose the **Source** for documents and (optionally) adjust the other settings, then click **Next**.



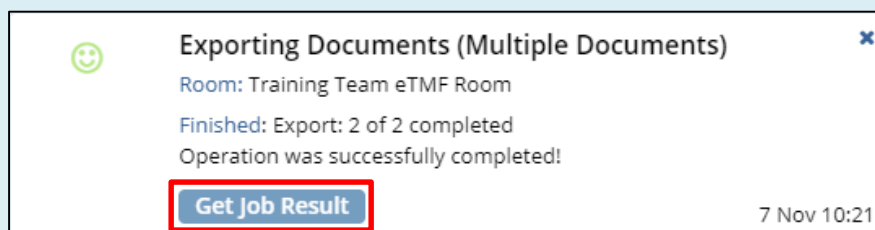
4c. Review your selection, then confirm by clicking **Export**.



5. Regardless of the module chosen (eTMF or SSU), after clicking the **Export** button, a pop-up notification near the top of the screen will alert you as to the progress of the Export action.



6. Once documents are processed successfully, click on **Get Job Result** to start the download of selected records to your local drive.



APPLICABLE TO:

All Users

eTMF

Study Start-Up



Pro Tip: if you miss the instant pop-up, you can still download your documents. Access the Username Menu at the upper right of the page and locate the appropriate notification.


Click **Get Job Result** there. The documents will download.



i About This Room
Show Room Info
Zoom 80% + Light

Notifications 2 Clear All

All
Background Jobs
Queries



Exporting Documents (Multiple Documents)

Room: Training Team eTMF Room

Finished: Export: 2 of 2 completed

Operation was successfully completed!

✕

Get Job Result

7 Nov 10:21