

How to Merge Documents

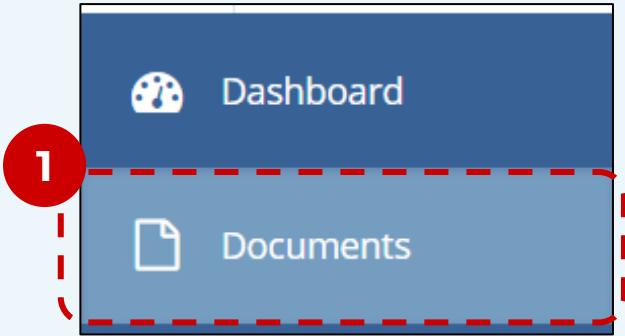
TI version 10.8

APPLICABLE TO:

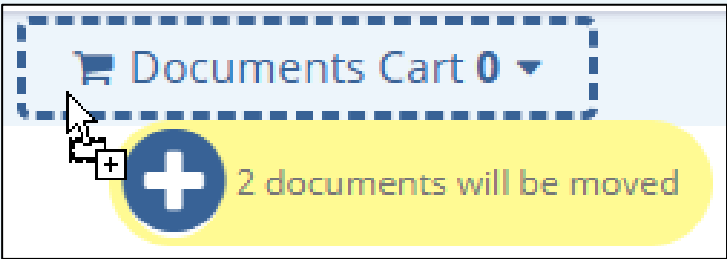
- ☒ Admin
- ☒ Manager
- ☒ Editor
- ☐ Reader
- ☒ eTMF
- ☒ Collaborate
- ☒ eISF

In TI, users with Editor permissions or stronger can merge multiple documents into one – this requires multiple documents of the same type, and supports only the following file types: .pdf, .html, .htm, .bmp, .jpg/.jpeg, .png.

1 Navigate to the **Documents** module.



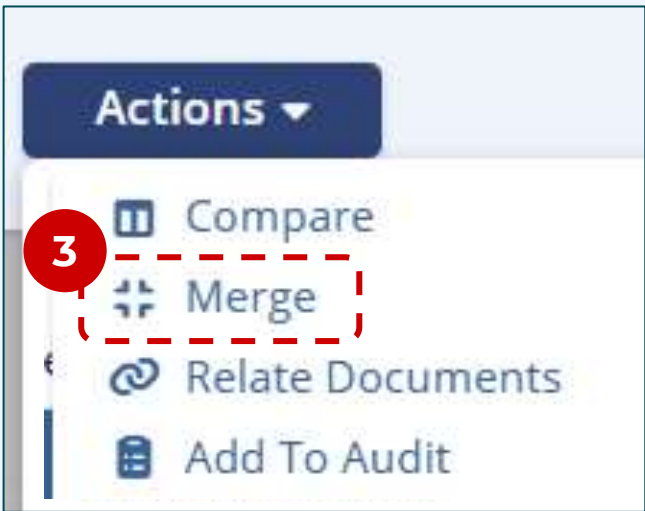
2 Select a minimum of two documents you wish to merge into one, and drag the selection into the **Documents Cart**.



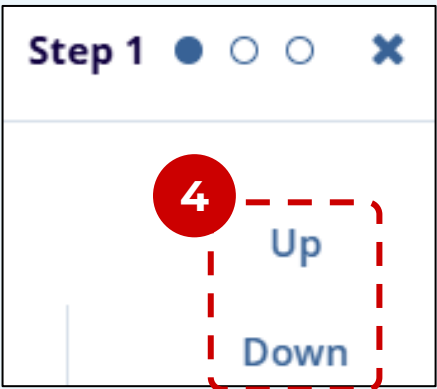
3 Open the Documents Cart, expand **Actions** and select **Merge**.



All documents must be the same format when selected. Non-same items will be automatically excluded.



4 Step 1: Documents will be displayed in the order of selection and this will be maintained in the merged document. If you need to change this order, you can use the **Up** and **Down** buttons on the right.



5 Click **Save as New Document** to move to Step 2.



6 Step 2: The upper dropdown allows the user to select one of the original documents as the source for metadata, accelerating the creation process of the new 'merged' document.

6 If applicable, choose which of the source documents' metadata should be copied to the new document.

▼

Dr. H-CV (Dr. H-CV.pdf)

FDA 1572 (FDA 1572.pdf)

the merge process.

7 Step 2 (cont.): Use the selection boxes to indicate documents you wish **deleted**.
This action may be unavailable to you, subject to user role and configuration.

Select which documents, if any, should be deleted as a part of the merge process.

2 Columns 1 selected

☐	Date	Title	Document Name	Comments
☐	04 Oct 2022	Clinical Protocol...		
☒	04 Oct 2022	InformedConse...		

8 Click **Next** to enter the final step: metadata review for the new document.

Previous

8 Next

9 Complete the metadata set (this may be pre-filled if you selected a value in step 6 of this Job Aid).

Document Type

Medical Qualification

Select

Submitted Name

Comments

Generated Name

Date Type

Effective Date

Document Date

dd MMM yyyy

Documents merging progress - (100%)

Cancel

10 Finish

10 Click **Finish**. The new document will be displayed in the Staging folder (subject to room configuration).