

How to Export a Document

TI version 10.8

- APPLICABLE TO:
- Admin

Manager

Editor

Reader

eTMF

SSU

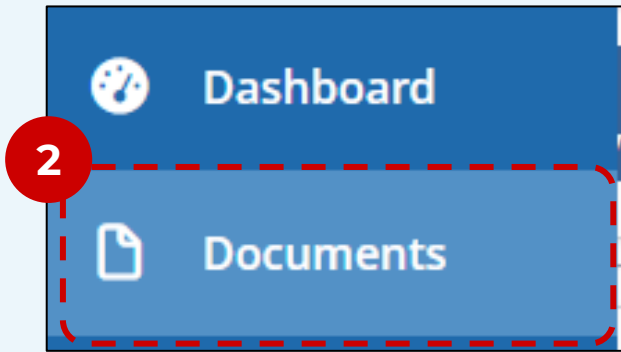
Collaborate / eISF

Trial Interactive offers users a variety of ways to export document information (including document files themselves). This guide illustrates a simple way to export multiple documents at one time. Notice that due to the configurability of TI rooms, some users may be barred from performing export actions.

1 Login to a room and navigate to the **eTMF/Collaborative Workspace** or **Study Start-Up (SSU)** apps via the Navigation Grid.



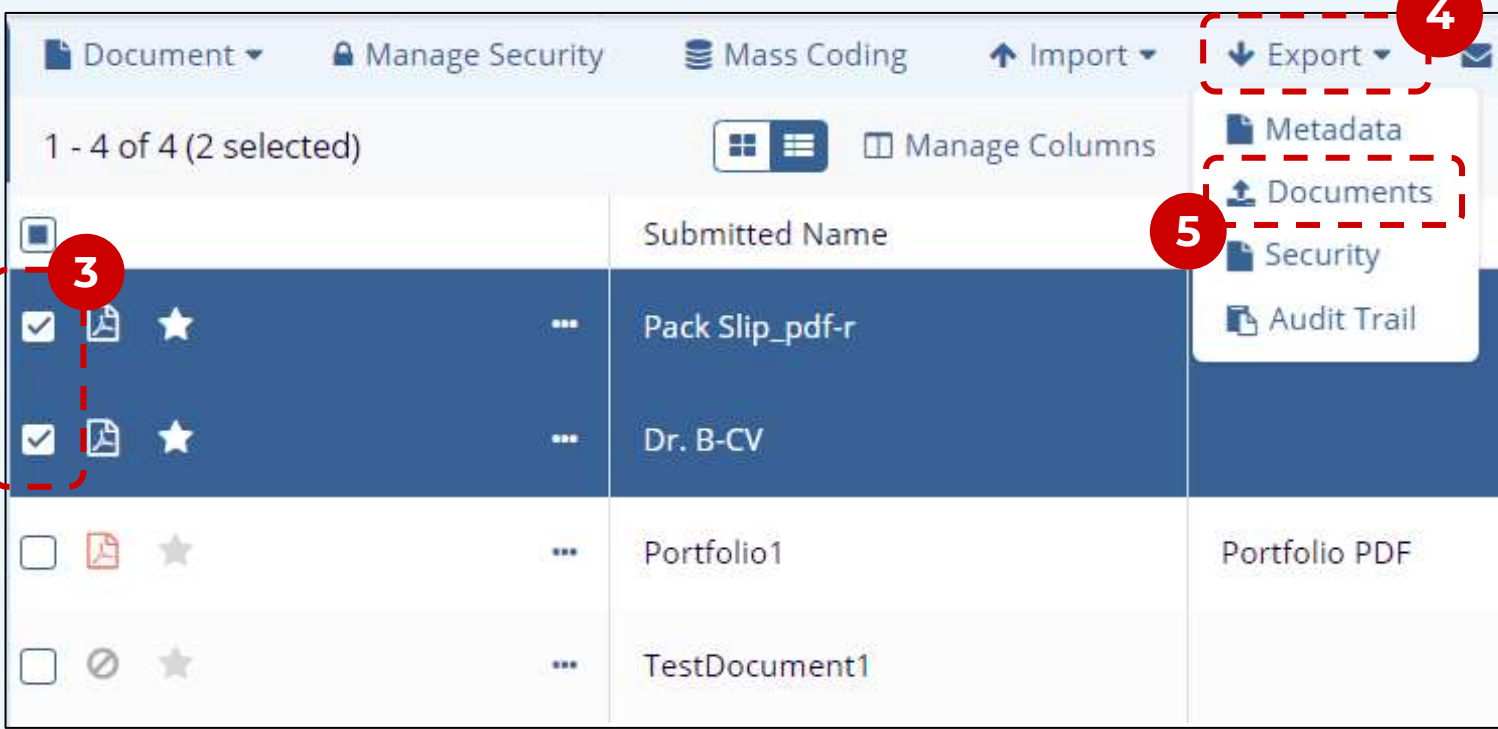
2 Navigate to the **Documents** module.



3 Select the desired document(s).

4 Expand the **Export** options in the ribbon.

5 Click the **Documents** button.



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6 In the Export window, choose your export type and any additional options.

Export Options

Source

6

☒ Selected records

☐ All documents in the current grid

Additional Options

☐ Track Export

☐ Exclude previously exported documents

☐ Include metadata

☐ Include Document Versions

Admins only

7 Click on **Export**, located at the bottom of the window.

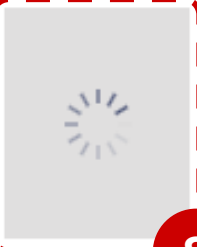
Cancel

7

Export

8 The room will generate a downloadable package. Wait for the job to load completely.

8



Exporting Documents (Multiple Documents)

Room: Training Team eTMF Room

InQueue

Cancel

7 Nov 10:21

9 When the documents are ready for download, click on **Get Job Results**.



Exporting Documents (Multiple Documents)

Room: Training Team eTMF Room

Finished: Export: 2 of 2 completed

Operation was successfully completed!

9

Get Job Result

7 Nov 10:21



Note: generated packages can be found in the Notifications menu for the duration of the session.

10 Find the documents as a .zip folder in your browser download manager or device downloads folder.

10



Downloads