How to Export a Document

TI version 10.8

TRIAL INTERACTIVE

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.
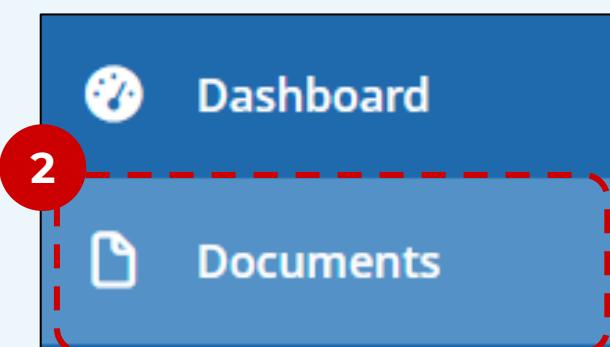
3 Select the desired document(s).
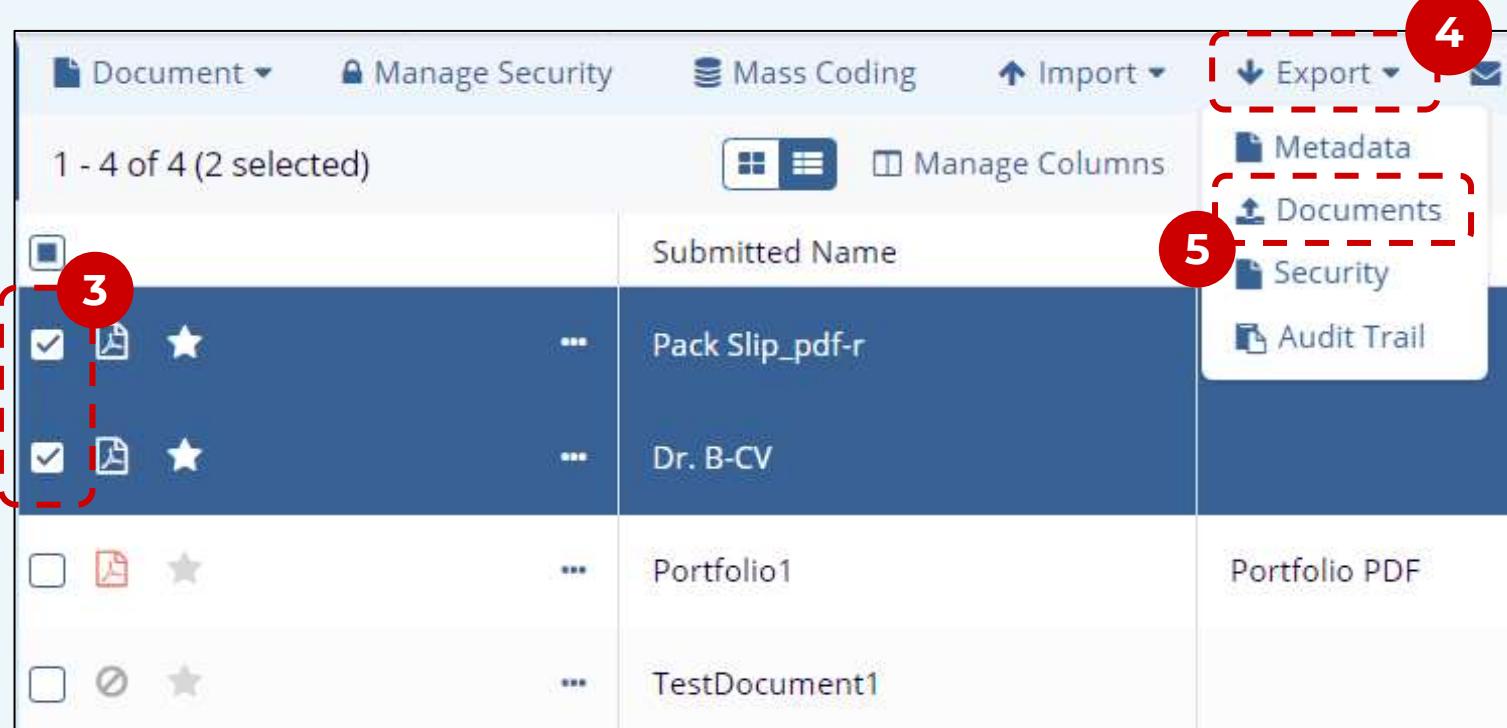
4 Expand the **Export** options in the ribbon.

5 Click the **Documents** button.

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Export Options

Source

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

○ Selected records
○ All documents in the current grid

Additional Options

☐ Track Export   Admins only
☐ Exclude previously exported documents
☐ Include metadata
☐ Include Document Versions
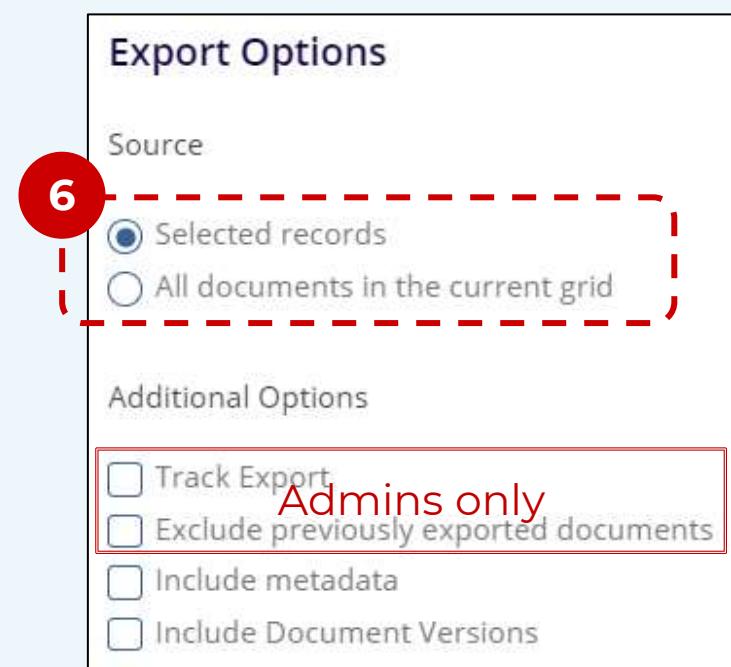
7 Click on **Export**, located at the bottom of the window.

Cancel   Export

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

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!
Get Job Result   7 Nov 10:21
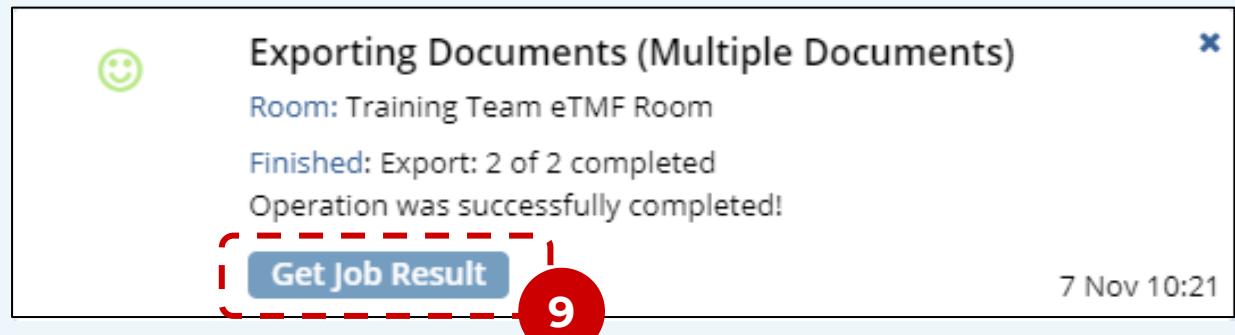
Note: generated packages can be found in the Notifications menu for the duration of the session.

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

Downloads