How to Relate Documents

TI version 10.8

TRIAL INTERACTIVE

APPLICABLE TO:

- ● Admin
- ● Manager
- ● Editor
- ○ Reader

- ● eTMF
- ● Collaborate

Documents that have some commonality can be Related to each other to aid in discoverability.
For example, while looking at an investigator's disclosure and agreement documents, you may want to easily find their biographical info as well.
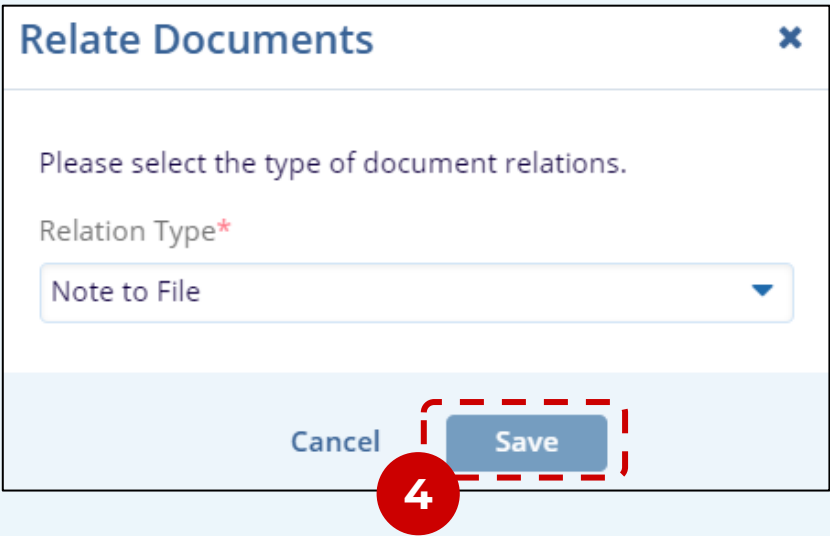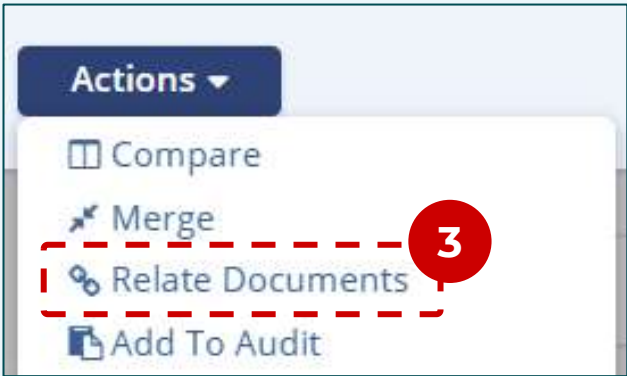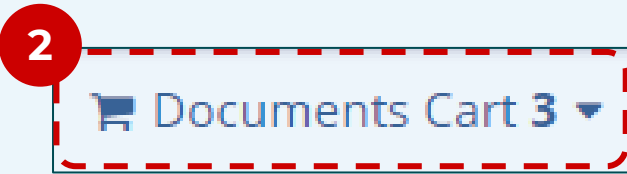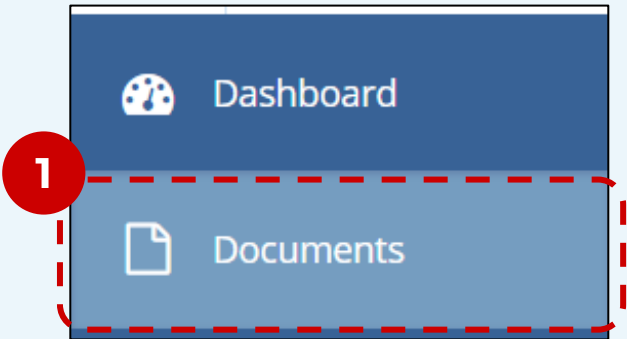
1 Navigate to the **Documents** module.

2 Identify documents you wish to relate, move them to the **Documents Cart**.

3 In the Documents Cart, expand **Actions** and select **Relate Documents**.

4 Select the *Relation Type* (think of it as the reason for relating), then click **Save**.

5 Successful completion is confirmed via notification.

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6 To see document relations, check the **Related** subpanel in the Metadata pane.