

How to Export a Document

TI version 10.8

- APPLICABLE TO:
- Admin

Manager

Editor

Reader

eTMF

SSU

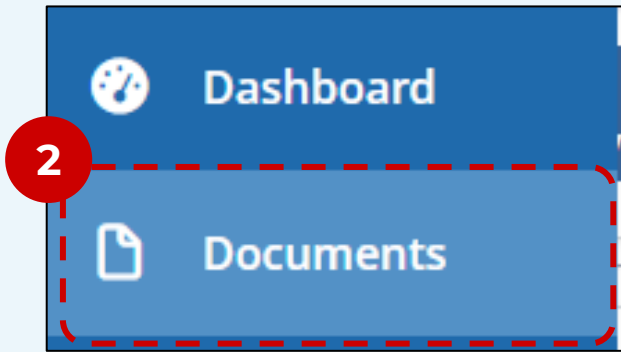
Collaborate / eISF

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.



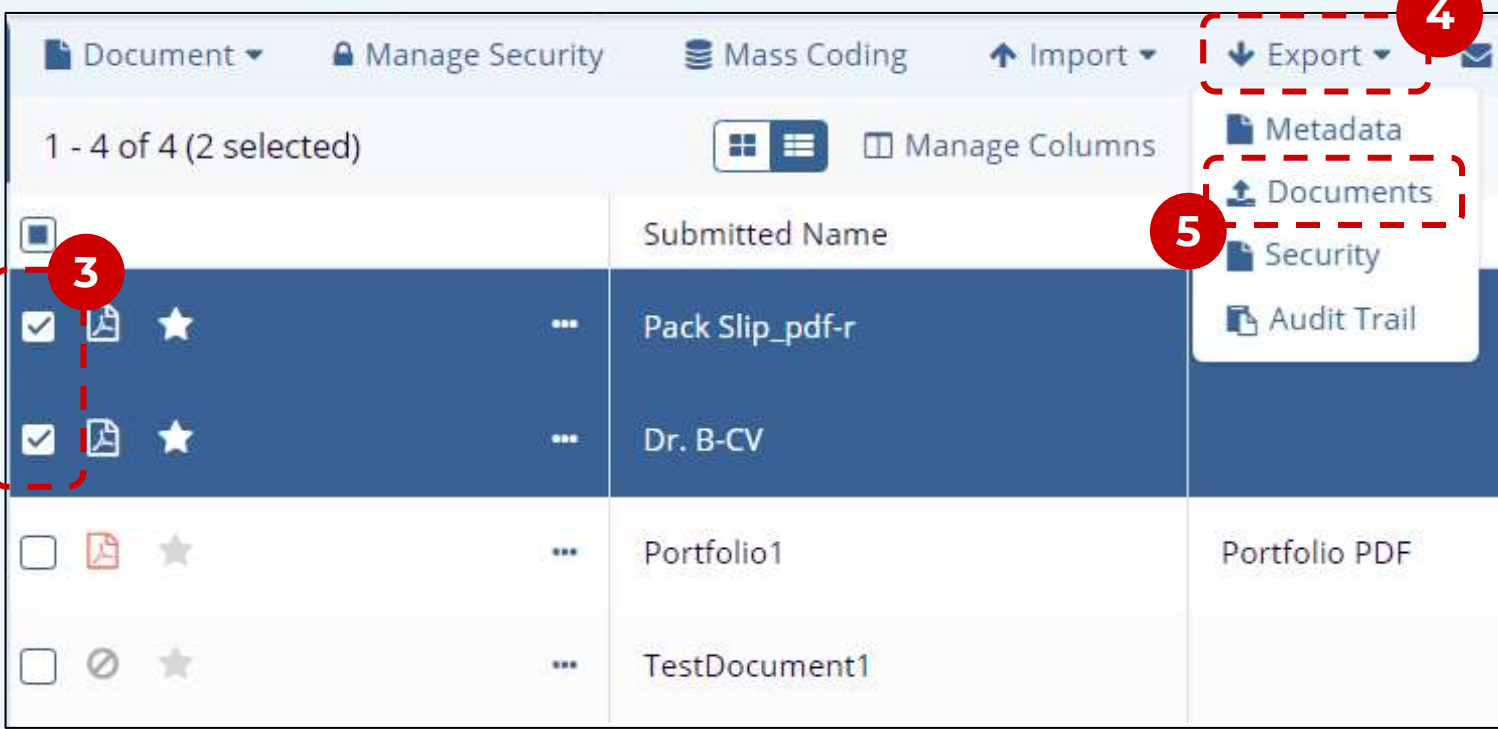
2 Navigate to the **Documents** module.



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.

The 'Export Options' dialog box is shown. It has two sections: 'Source' and 'Additional Options'. In the 'Source' section, 'Selected records' is selected with a radio button, and 'All documents in the current grid' is unselected. In the 'Additional Options' section, there are four checkboxes: 'Track Export', 'Exclude previously exported documents', 'Include metadata', and 'Include Document Versions'. A red dashed box highlights the 'Source' options, and a red circle with the number 6 is next to it. A red box highlights the 'Exclude previously exported documents' checkbox, with the text 'Admins only' written in red above it.

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

Two buttons are shown: 'Cancel' and 'Export'. The 'Export' button is highlighted with a red dashed box and a red circle with the number 7.

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

The 'Exporting Documents (Multiple Documents)' dialog box is shown. It has a title bar with a close button. Below the title bar, it says 'Room: Training Team eTMF Room' and 'InQueue'. There is a 'Cancel' button. A red dashed box highlights the entire dialog box, and a red circle with the number 8 is next to it. The date and time '7 Nov 10:21' are shown in the bottom right corner.

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

The 'Exporting Documents (Multiple Documents)' dialog box is shown. It has a title bar with a close button. Below the title bar, it says 'Room: Training Team eTMF Room' and 'Finished: Export: 2 of 2 completed'. Below that, it says 'Operation was successfully completed!'. There is a 'Get Job Result' button. A red dashed box highlights the 'Get Job Result' button, and a red circle with the number 9 is next to it. The date and time '7 Nov 10:21' are shown in the bottom right corner.



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.

A browser download manager icon is shown. It has a red dashed box around it and a red circle with the number 10. Below the icon, the word 'Downloads' is written.