

- APPLICABLE TO:
- ☒ Admin

☒ Manager

☒ Editor

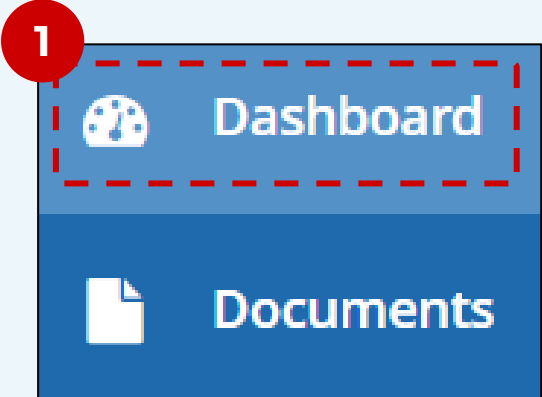
☐ Reader

☒ eTMF

Some documents, by their very nature, have limited validity in time. TI’s eTMF includes features that help manage such documents. In this guide, you’ll learn how to use the eTMF dashboard to manage documents that need to be replaced or discontinued when their validity expires

1

Access your eTMF Dashboard . For many, this is the default first page when entering.



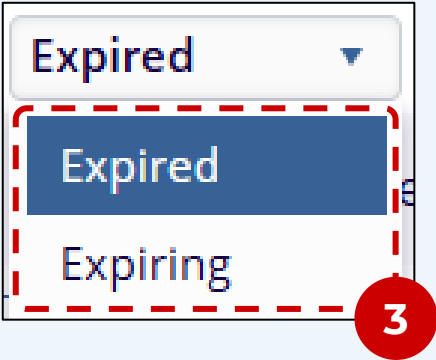
2

Navigate to the **Expired Documents** dashlet. By default, this is located in the eTMF group of dashlets.



3

Select one of the two list modes: **Expired** or **Expiring**.



‘Expiring’ mode allows you to plan the intake of documents that require renewal, or to replace content proactively.

4

To manage a document renewal or dismissal, select a document then click **Add New Version**.



How to Manage Expired Documents on the Dashboard

5 Select one of up to three options: **Replace the Attachment, A new version was already submitted..**, or **Add a new Document..** .

Available Methods:

- ☐ Replace the Attachment
- ☐ A new version was already submitted. Remove this document from the list.
- ☐ Add a new Document and keep the existing Document as an old version

6a **Replace the Attachment** requires you to upload a document. This will be the new current version of the existing document. It requires a change in expiration date, and a reason must be provided.

☒ Replace the Attachment

File Name

Attachment Type ☒ File ☐ URL

Attachment File*

Set New Expiration Date*

Reason*

6b Use **‘A new version was already submitted. Remove this document from the list’** if the document does not need renewal, or a replacement already exists. This will only remove the entry for the document in expiration lists, no changes will be made to the document itself.

6c Use **‘Add a new Document and keep the existing Document as an old version’** to upload content to function as a separate new document profile. You will have to perform metadata entry at upload. The existing document is not changed but it is removed from expiration lists.