

How to Mass Copy a Document to all Sites

TI version 10.8

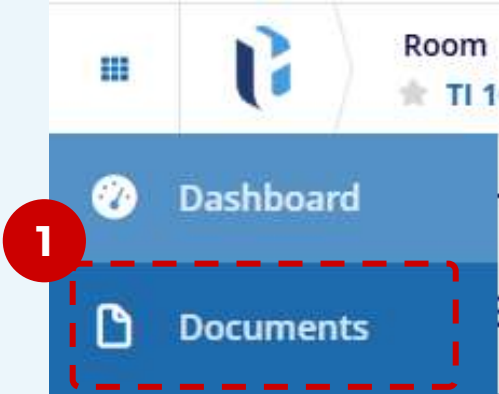
APPLICABLE TO:

- Admin
- Manager
- Editor
- Reader
- eTMF

Some documents, e.g. training documents, may be needed at multiple Site locations in the eTMF Index. This Job Aid guides users in using a helpful tool to simplify the process of distributing copies of one or more documents to Site folders.



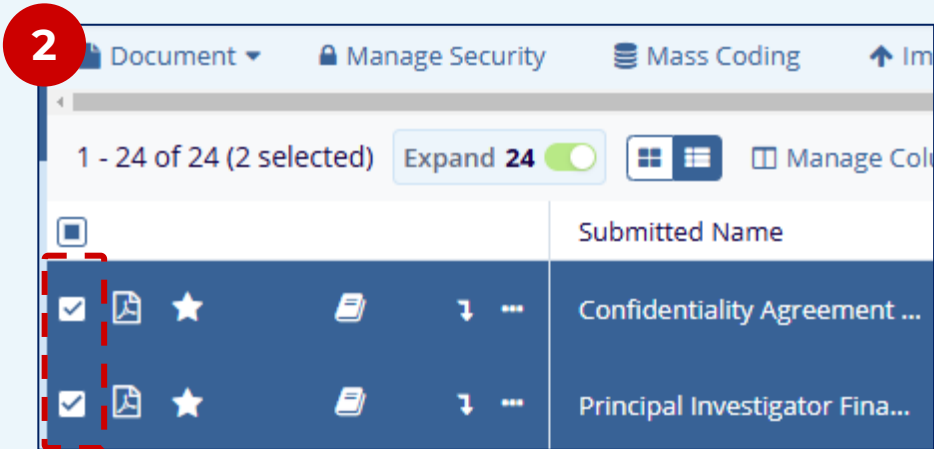
1 Enter a room and click the **Documents Module** using the Navigation Bar on the left.



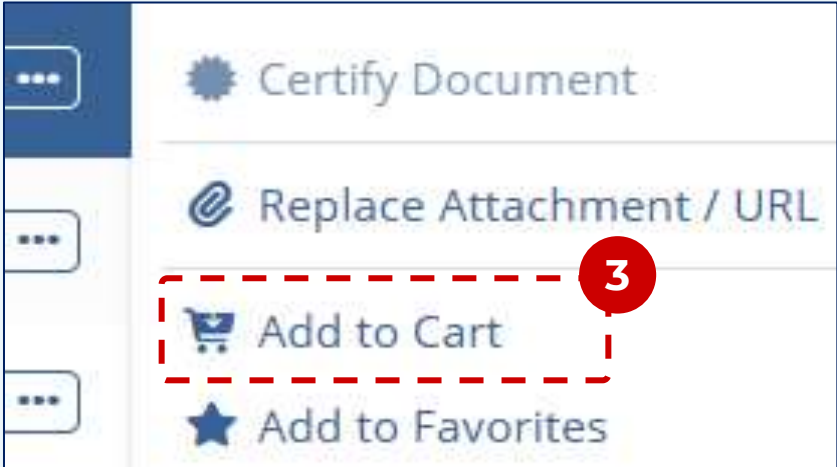
2 Locate and **select** the document(s) to be copied.



A document does not have to be Final in order to be copied.



3 -If one document: Click on the three-dotted document action menu and select **Add to Cart**.
-If multiple documents: Drag onto **Documents Cart**.



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- 4

Open the Documents Cart (located at far right on the ribbon)


Click **Share**, then select **Copy To Sites**.
- 5

Choose the preferred option for distributing the document and click **Next**.

In this example, we are sending a copy of the document to All Sites.

- 6

Select the folder where you want copies of the document to go, then click **Copy**.



Final documents will be cloned to the Index as Final documents.

Non-Final documents will be cloned and included in the QC Workflow.

- 7

When the job is done, a notification will confirm the cloning was successfully completed.

