

How to Merge Documents

TI version 10.8

APPLICABLE TO:

- ☒

Admin
- ☒

Manager
- ☒

Editor
- ☐

Reader

☒

eTMF

☒

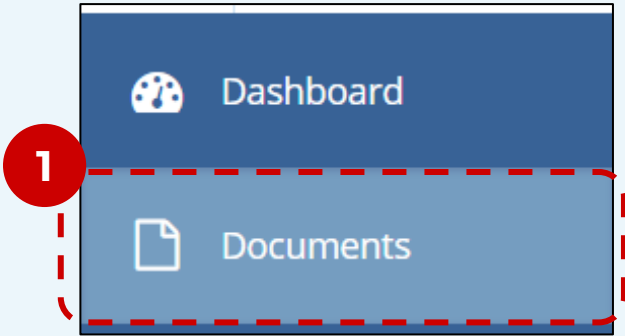
Collaborate

☒

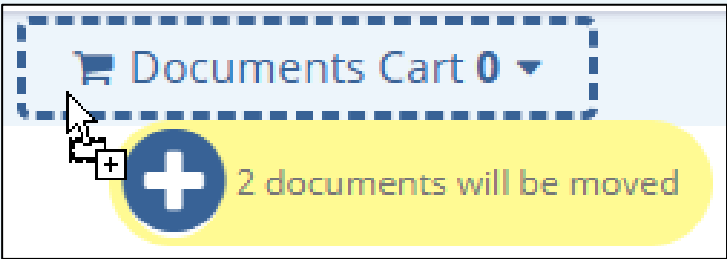
eISF

In TI, users with Editor permissions or stronger can merge multiple documents into one – this requires multiple documents of the same type, and supports only the following file types: .pdf, .html, .htm, .bmp, .jpg/.jpeg, .png.

1 Navigate to the **Documents** module.



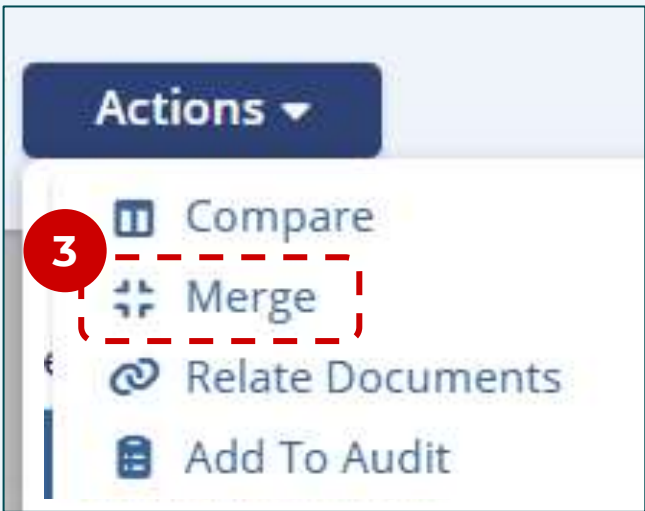
2 Select a minimum of two documents you wish to merge into one, and drag the selection into the **Documents Cart**.



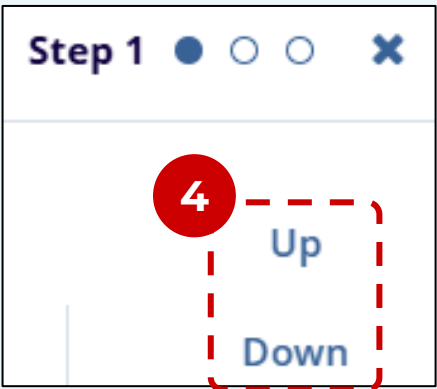
3 Open the Documents Cart, expand **Actions** and select **Merge**.



All documents must be the same format when selected. Non-same items will be automatically excluded.



4 Step 1: Documents will be displayed in the order of selection and this will be maintained in the merged document. If you need to change this order, you can use the **Up** and **Down** buttons on the right.



5 Click **Save as New Document** to move to Step 2.



6 Step 2: The upper dropdown allows the user to select one of the original documents as the source for metadata, accelerating the creation process of the new 'merged' document.

6 If applicable, choose which of the source documents' metadata should be copied to the new document.

▼

Dr. H-CV (Dr. H-CV.pdf)

FDA 1572 (FDA 1572.pdf)

the merge process.

7 Step 2 (cont.): Use the selection boxes to indicate documents you wish **deleted**.
This action may be unavailable to you, subject to user role and configuration.

Select which documents, if any, should be deleted as a part of the merge process.

2 Columns 1 selected

<input type="checkbox"/>	Date	Title	Document Name	Comments
<input type="checkbox"/>	04 Oct 2022	Clinical Protocol...		
<input checked="" type="checkbox"/>	04 Oct 2022	InformedConse...		

8 Click **Next** to enter the final step: metadata review for the new document.

Previous

8 Next

9 Complete the metadata set (this may be pre-filled if you selected a value in step 6 of this Job Aid).

10 Click **Finish**. The new document will be displayed in the Staging folder (subject to room configuration).

Document Type

Medical Qualification

Select

Submitted Name

Comments

Generated Name

Date Type

Effective Date

Document Date

dd MMM yyyy

Documents merging progress - (100%)

Cancel

10 Finish