

How to Merge Documents

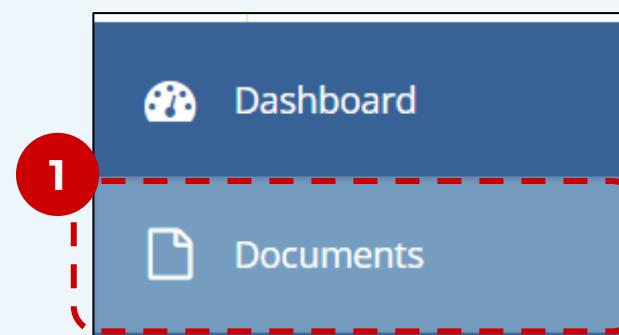
TI version 10.8

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.



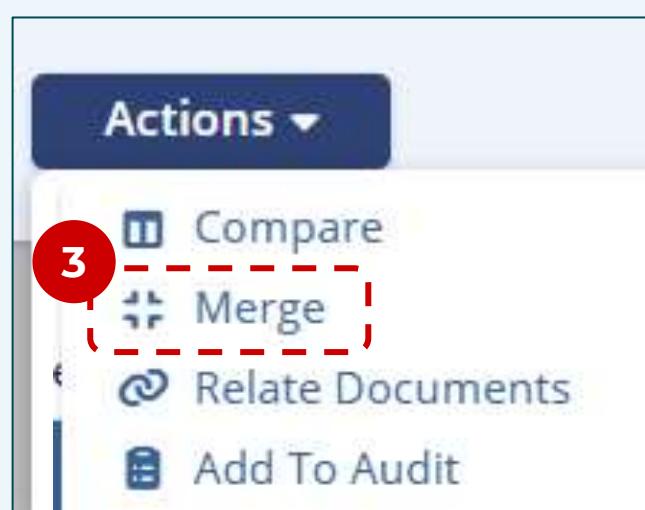
- 2 Select a minimum of two documents you wish to merge into one, and drag the selection into the **Documents Cart**.



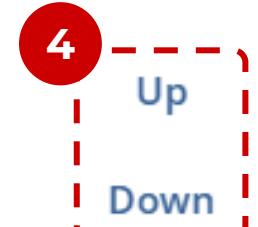
- 3 Open the Documents Cart, expand **Actions** and select **Merge**.



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.

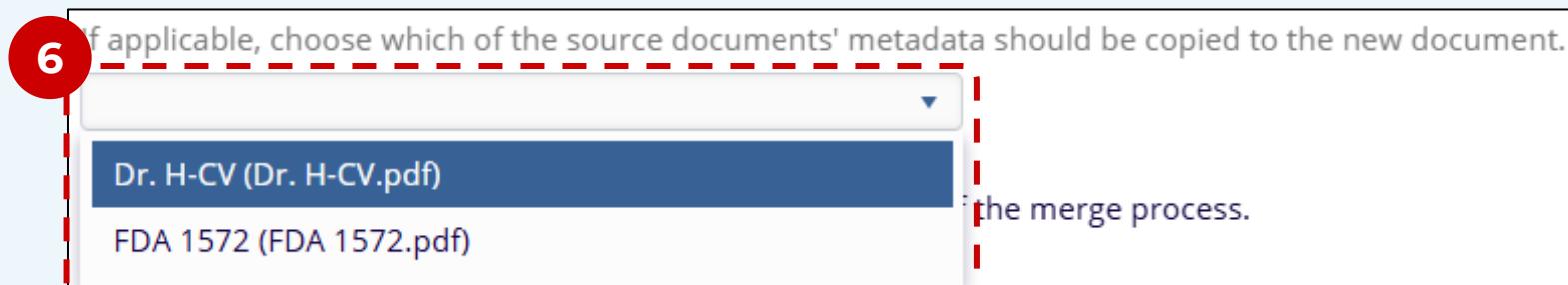


- 5 Click **Save as New Document** to move to Step 2.

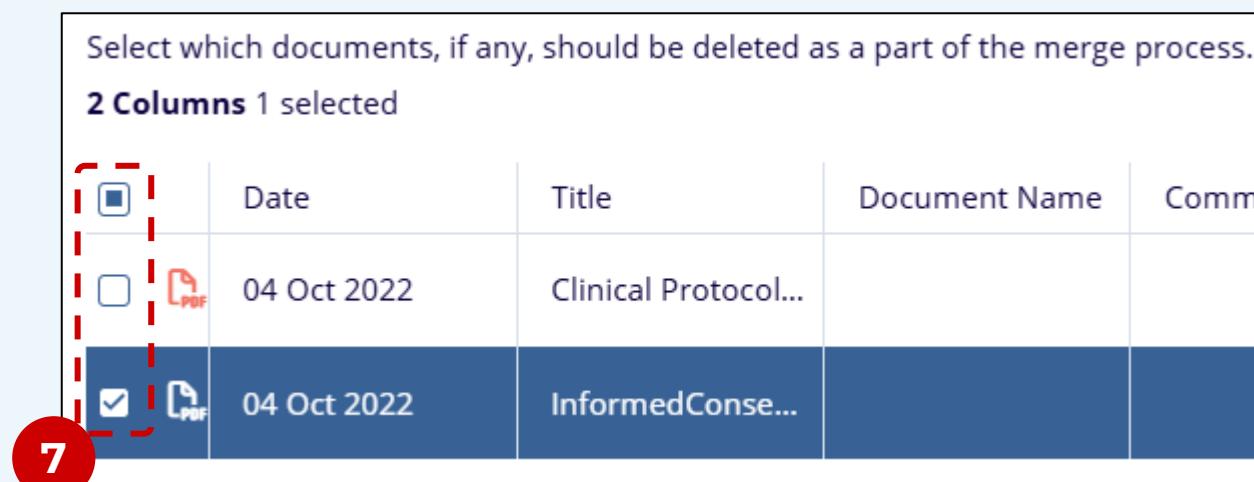


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6 Step 2: The upper dropdown allows the user to select one of the original documents as the source for metadata, accelerating the creation process of the new 'merged' document.



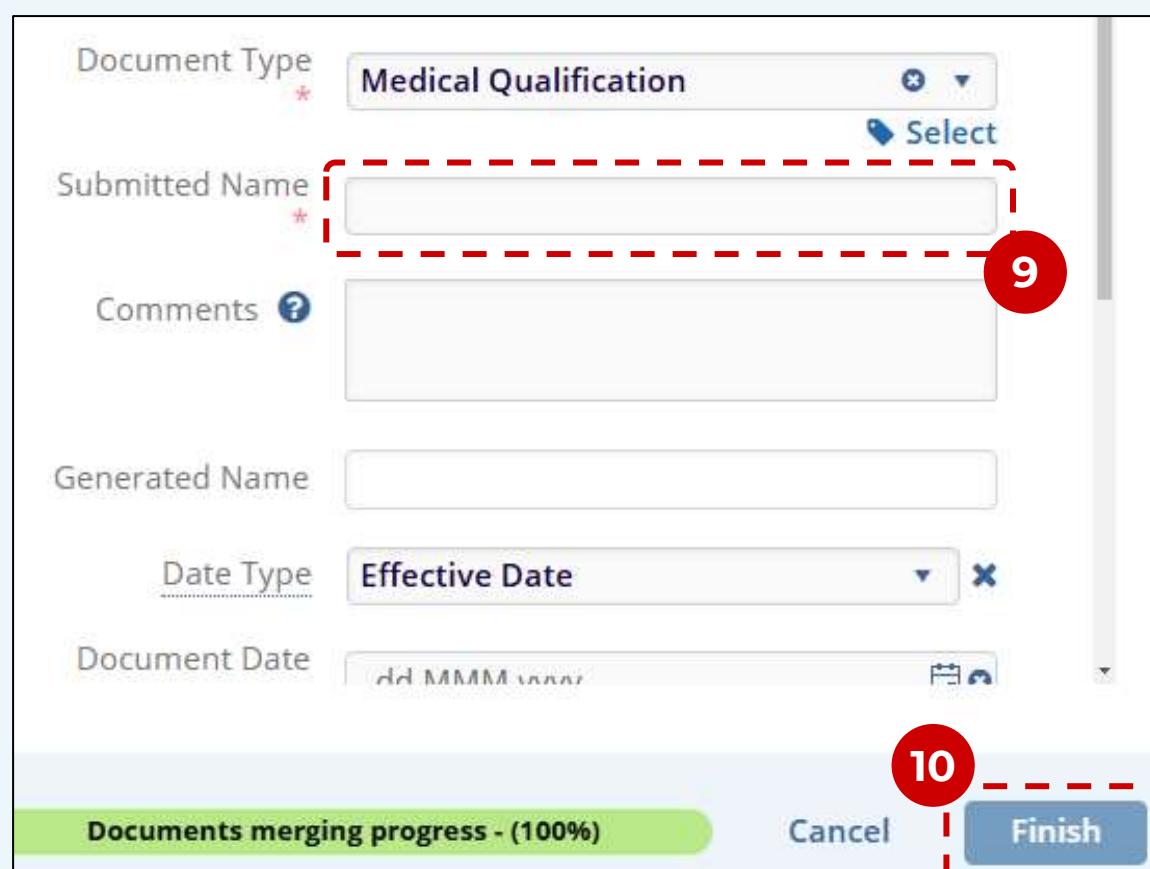
7 Step 2 (cont.): Use the selection boxes to indicate documents you wish **deleted**. This action may be unavailable to you, subject to user role and configuration.



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



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).