How to Share Documents to Other Rooms

TI version 10.8

TRIAL INTERACTIVE

APPLICABLE TO:

- ● Admin
- ● Manager
- ● Editor
- ○ Reader

- ● eTMF
- ● Collaborate / eISF

This features enables seamless transfer of information between rooms, eliminating extra steps such as download of documents, and reducing the need to look for information in multiple locations. It additionally updates the cloned document when the original undergoes a change, further reducing the need for manual intervention.
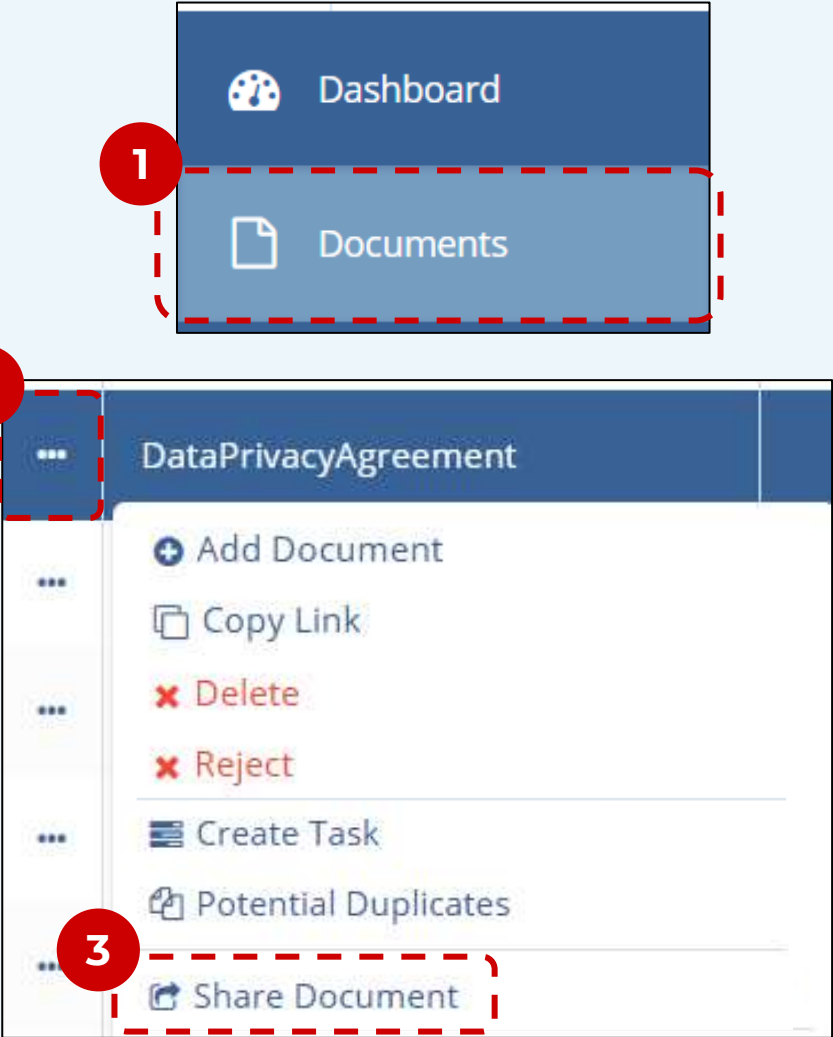
1 Navigate to the **Documents** or **Documents Library** module.

2 Identify a document to share and open its Document Actions Menu.

3 Click on **Share Document**.

⚠️ This action requires room and user configuration enablement. If you do not see this button anywhere, contact your room Administrator.
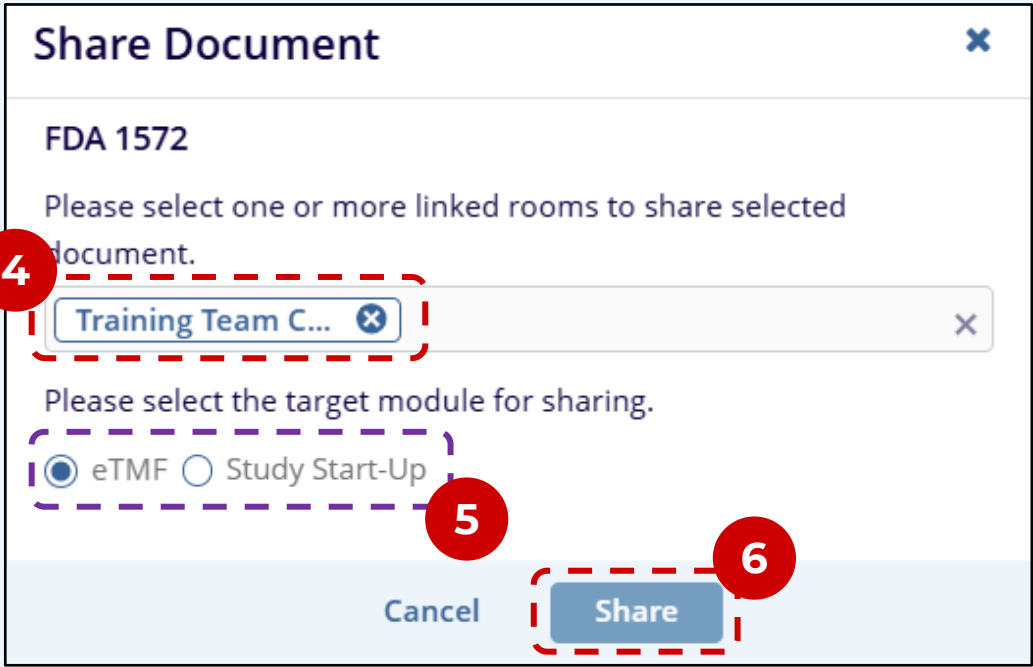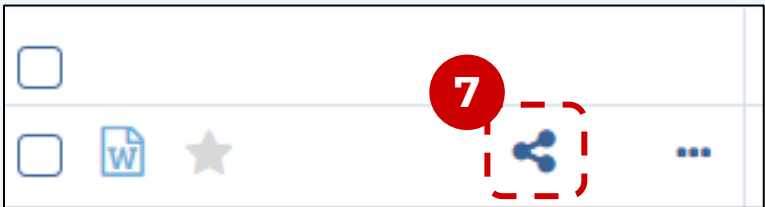
4 In the share details window, **select the target room**.

5 Some rooms may have <u>multiple modules</u> to target. Choose *one*.

6 Click the **Share** button.

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7 Once sharing is completed, you can identify documents that have copies in other rooms by the presence of a **distribution icon**. Details of sharing can be read in the Metadata panel.

8 Documents can also be shared via the **Documents Cart**.