How to Manage Expired Documents on the Dashboard
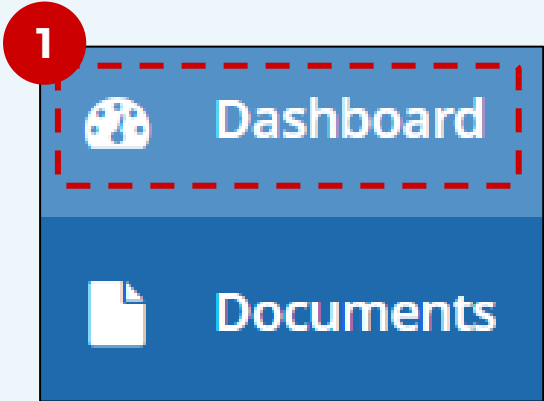
TI version 10.7

TRIAL INTERACTIVE

APPLICABLE TO:

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

● eTMF

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

1
Dashboard
Documents

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

eTMF

eTMF Health **2** Expired Documents

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

Expired ▼
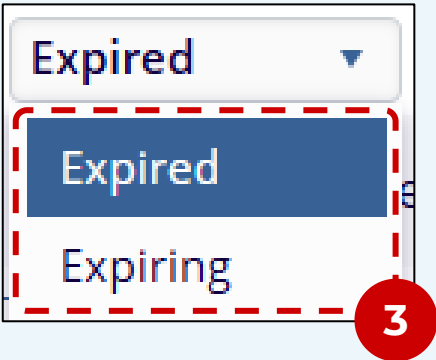
Expired
Expiring
3

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

4
⊕ Add New Version   📄 Export Documents Metadata
⟳   ⊞ Manage Columns   ▼ Filters   👁 Views ▼

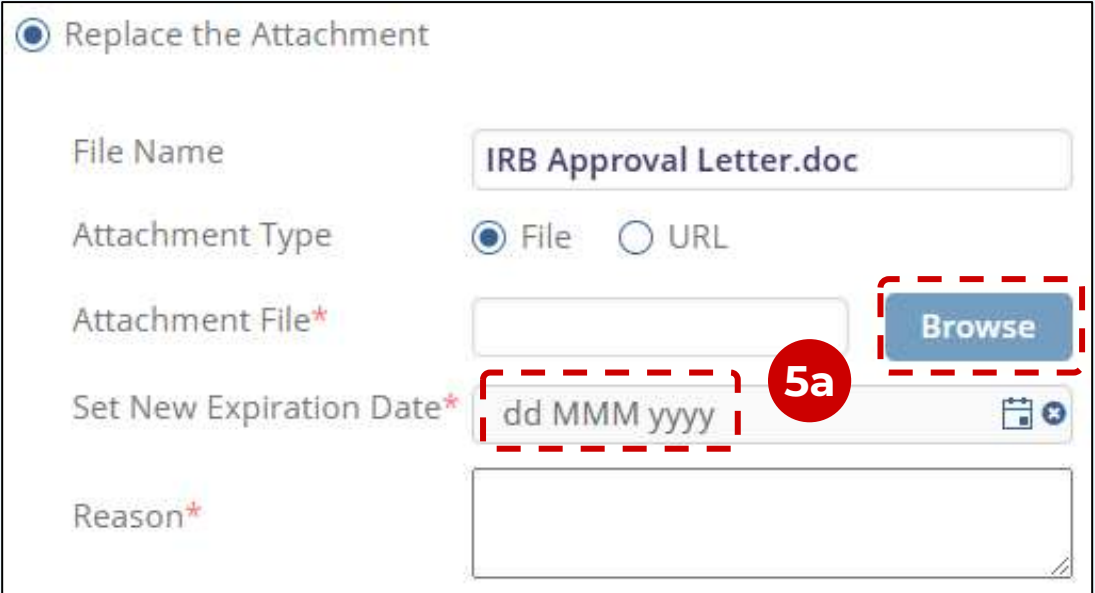**5** Select one of up to three options: **Replace the Attachment**, **A new version was already submitted..,** or **Add a new Document.. .**

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
5

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

Replace the Attachment

File Name	IRB Approval Letter.doc
Attachment Type	◉ File ○ URL
Attachment File*	[ ] **Browse**
Set New Expiration Date*	dd MMM yyyy **5a**
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 affect the listing of the document in expiration lists, no changes will be made to the document.

6c Use **Add a new Document and keep the existing Document as an old version** to upload content that is treated as a separate new document profile. You will have to complete metadata selection.
The existing document is not changed but it is removed from expiration lists.

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