How to Mass Copy a Document to all Sites

TI Version 10.7

APPLICABLE TO:

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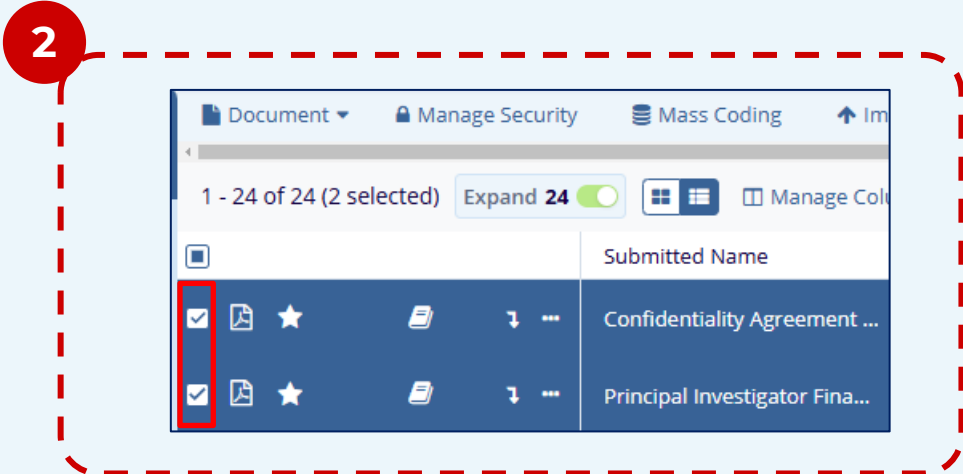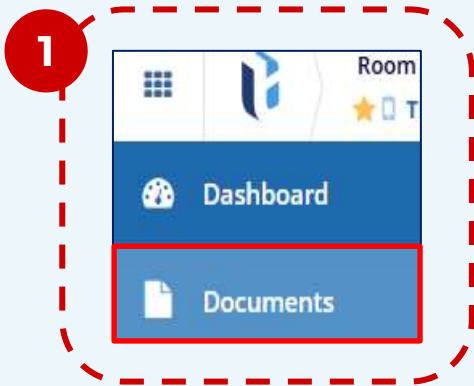- ● Manager
- ● Editor
- ○ Reader

● eTMF

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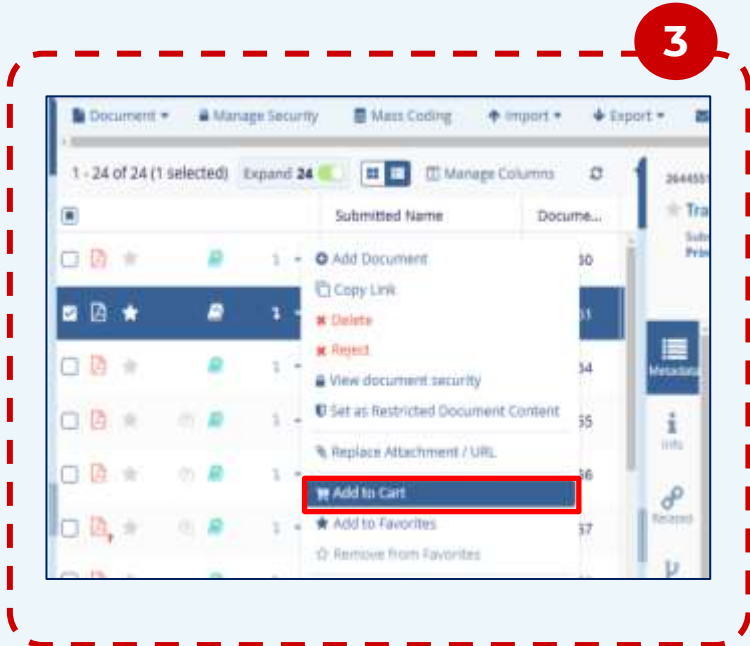

2 Locate the document(s) to be copied.

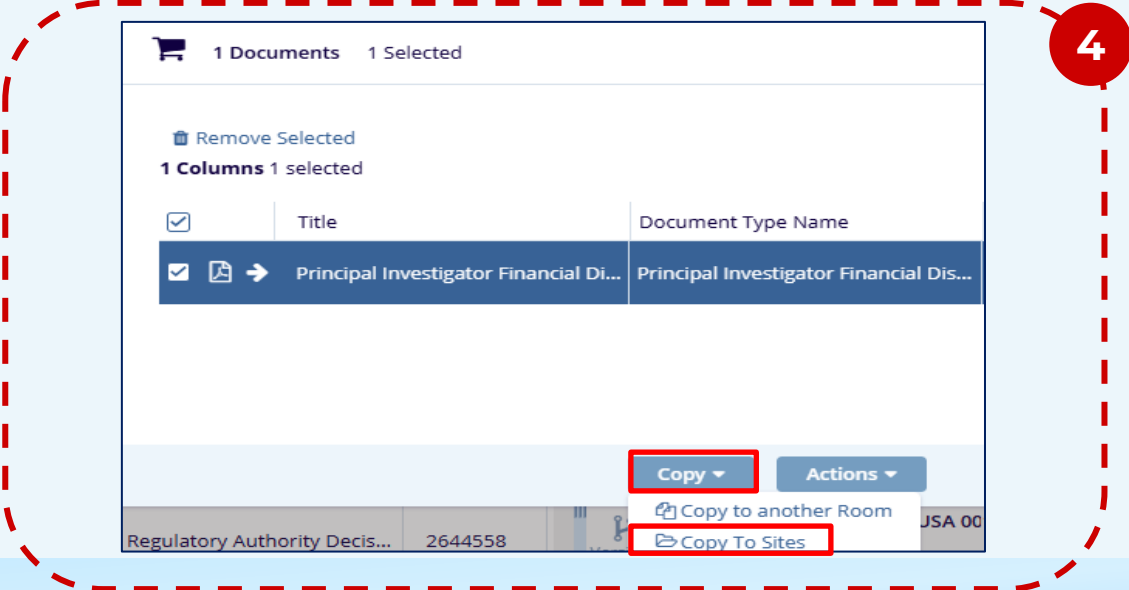*Note: A document does <u>not</u> have to be Final in order to be copied

3 Click on the three-dotted document action menu and select **Add to Cart**.
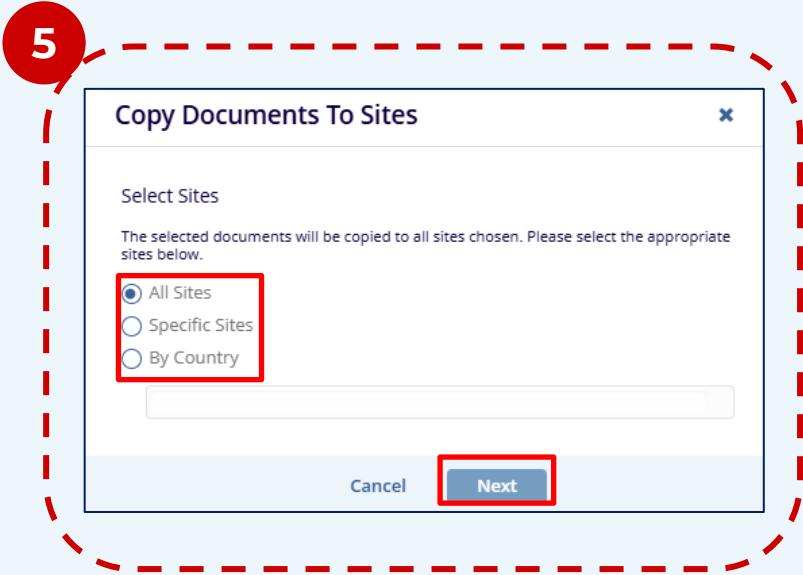

4 Open the Documents Cart (upper right corner of the interface)
Click **Copy**, then select **Copy To Sites**.

TRIAL INTERACTIVE

5 Choose the appropriate option for distributing the document and click **Next**.

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

5

Copy Documents To Sites ✕

Select Sites

The selected documents will be copied to all sites chosen. Please select the appropriate sites below.

○ All Sites
○ Specific Sites
○ By Country

Cancel   **Next**

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

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

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

6

Copy Documents To Sites ✕

Select Folder

Please select the final destination folder for the copied documents.

🔍 Search...

▼ Index Root
  ▼ 01 Trial Management
    ▼ 01.01 Trial Oversight
      01.01.06 Recruitment Plan
      01.01.08 Monitoring Plan
      01.01.11 Debarment Statement
      01.01.14 Audit Certificate

Previous   **Copy**
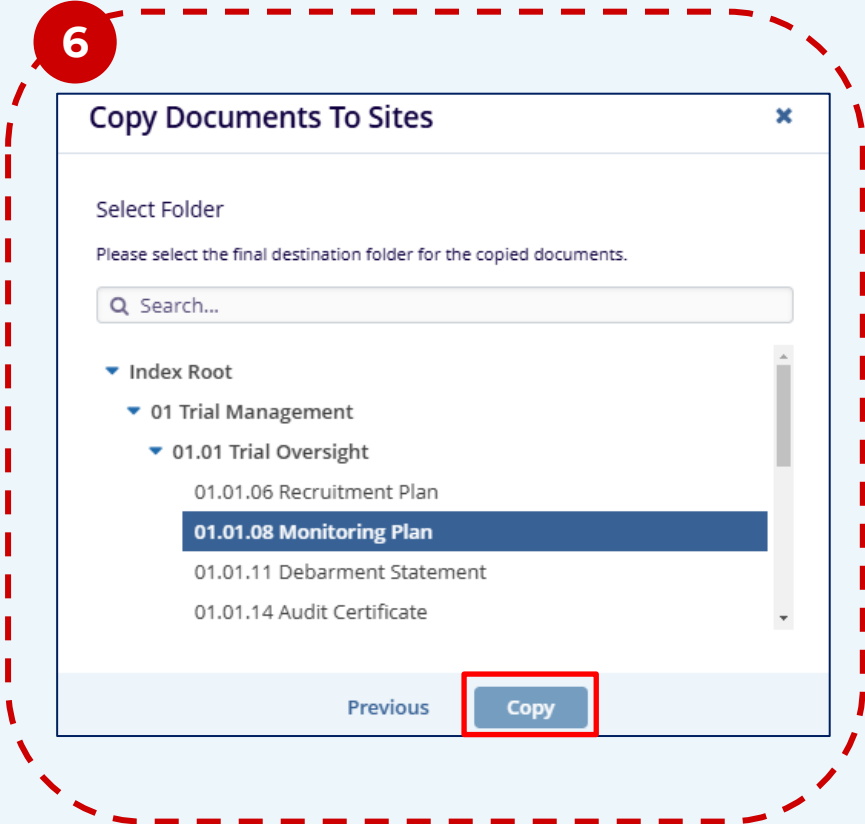
7 When the job is done, a notification will confirm the cloning was successfully completed.

7

☺ **Copy Documents to Sites**
Room: TI Training Team SSU/eTMF Room
Success! Task is complete.
Get Results

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