

How to Save or Archive eISF Content at Study Close

Introduction

The Florence system allows you to store your study documents in a cloud storage solution post study close out by using our long-term archiving (LTA) feature.

The archived content will still be accessible via the Archives page inside your eBinders Team and are searchable in the global search. If you need them, they'll be right at your fingertips!

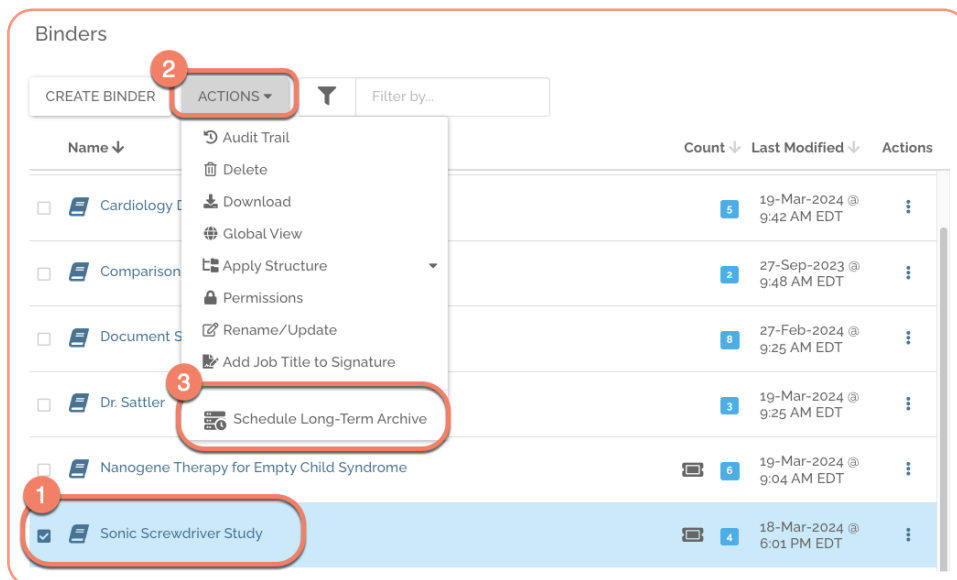
Note: Throughout this document, the term “binder” refers to either a binder or a folder within Florence eBinders. These terms may be used interchangeably as the same process applies when archiving at either the binder or folder level.

Archiving Binders with LTA

Scheduling binders for archiving is a quick and easy process.

Note: The Site Admin is responsible for assigning the appropriate role to users who should have permissions to schedule and view the LTA. All other users will lose access to the study binder once the archive is complete.

First, check the box beside the binder you want to archive. Then go to the **Actions** menu and click **Schedule Long-term Archive**. **Note: The Long Term Archive feature does not have any restricted access.**



Next, type the binder’s name to confirm you want to archive it and select the **Scheduled Archive Date**. This is the date that the study binder will be archived and it will be moved to the Archives section (along with all its documents). If any documents will need to be uploaded after the close-out date, choose an Archive Date that accounts for receiving those later documents.

You can also select your desired retention period if you like. The default retention period is 25 years after the date the binder was archived. You can change this by clicking the Specify Retention Period toggle and selecting the number of years from the drop-down menu. Note that you cannot choose a period greater than 25 years.

Click **Next** when done.

← BACK TO BINDER

Schedule Long-Term Archive For Binder

You are about to schedule a long-term archive on the item below. The scheduled archive date will be in your Florence team time zone and it will be moved to long-term storage on that date.

Binder Name: Efficacy of Christmas Lights on Seasonal Depression
Location: *** / 📁 Efficacy of Christmas Lights on Seasonal Depression
Scheduled by: Colleen Toliver - colleen.toliver@florencchc.com

* Type the name of the selected binder to confirm

* Scheduled Archive Date (Team Time Zone)

Scheduled Archive Date 13-Dec-2024 @ 12:00 AM (EST) **Local Scheduled Archive Date** 13-Dec-2024 @ 12:00 AM (America/New_York)

📌 Select the date when all study/site documents in Florence are expected to be finished and no longer actively changing.

⚠️ After the Scheduled Archive Date, any changes made to the binder **will not be reflected in the archive.**

Retention period
The specified duration for long-term archiving is intended for tracking and reporting of documents for your study; record retention within Florence is outlined in customer agreements.

📌 Default retention period is 25 years from a day this binder was archived.

🔘 Specify retention period

* **Set Retention Period**

 Years

Read the statements on the following page and check them off to confirm you've read them. Then click **Schedule Archive** to finish.

Schedule Long-Term Archive For Binder

Binder Name: Sonic Screwdriver Study
Location: 📁 Customer Success Training / 📁 Sonic Screwdriver Study
Scheduled by: Colleen Toliver - colleen.toliver@florencchc.com
Scheduled Archival Date (Team Time Zone): 31-Jul-2024 @ 12:00 AM (EST)
Local Scheduled Archival Time: 31-Jul-2024 @ 01:00 AM (America/New_York)

* Please read ALL statements below to continue:

I have performed all the necessary steps needed to archive this binder.

I understand that after 31-Jul-2024 (archival date), any changes made to the selected binder **will not be reflected in the archive.**

I understand that if this binder contains **PHI documents**, all users with the Download Long-Term Archive permissions will be able to view them.

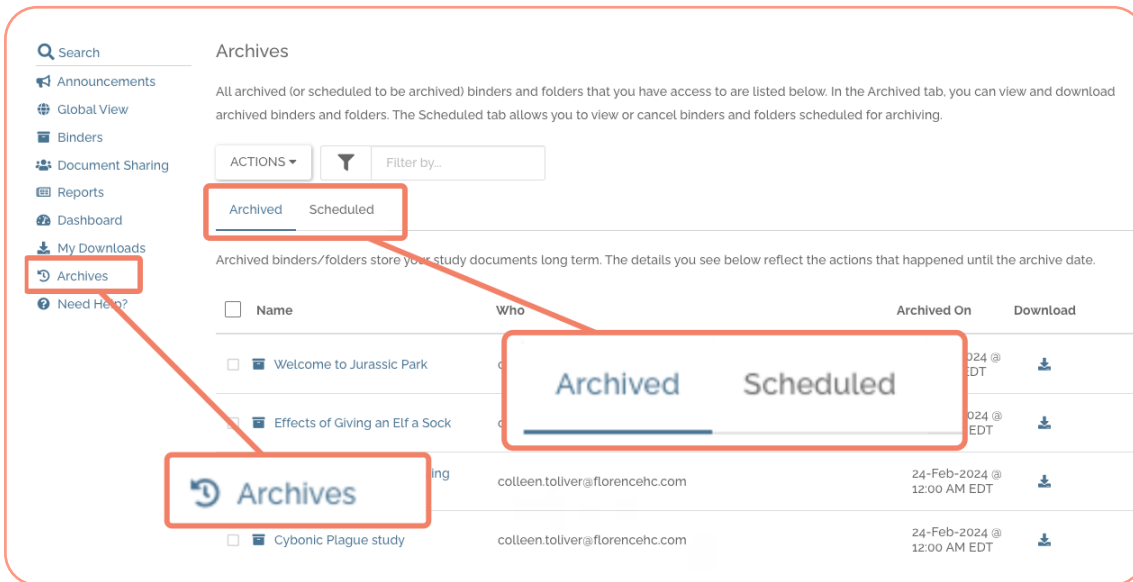
I understand that binder content, audit trails, and any actions taken (e.g. uploads, moves, etc.) until the Archival Date will be included in the archive.

BACK **SCHEDULE ARCHIVE**

And that's it! Your binder is now scheduled for archiving.

Now that you're finished, you'll receive a confirmation email regarding your scheduled archive. When the binder is officially archived (on the Scheduled Archive Date you chose above), you'll receive a second confirmation email to let you know the archive is complete.

You can see all your scheduled and completed archives at any time by going to the **Archives** page and viewing the content under **Archived** and **Scheduled** tabs:



All content inside the binders will be viewable for the duration of the contractually agreed-upon time period. If any questions arise or if you need to locate a particular document from the archived study quickly, you can do that by viewing the binder on the **Archives** page.

You can also download archived binders from the **Archives** page directly.

If additional documents need to be added, or if archived documents require edits, contact your study sponsor.

Downloading Binders (Archived and Non-Archived)

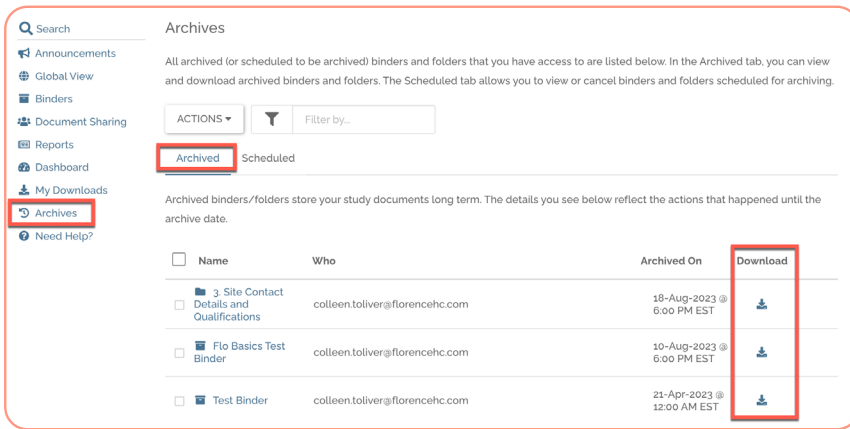
We recommend keeping your archived binders stored in eBinders and accessing your content digitally from your Team. However, if you like, you can download binders from Florence directly.

Option 1: Downloading Archived Binders

If your site uses our long-term archiving process, you can download archived binders directly from the **Archives** page.

Binders that have been archived can be downloaded from the Archives page at any time between the Scheduled Archive date to the end date of the long-term archive/LTA.

To download, locate the binder under the **Archived** tab. Then click the icon in the **Download** column. The archive will download as a zip file to your computer.



The archive download will include all the contents the role has the ability to download, a list of all the contents, and the audit trails events as a CSV and PDF for actions that occurred prior to the archive date. Any actions taken after the archive date will not be included in the archive download.

Note: Any empty binders will not appear in the downloaded archive file, as there is no content available for download.

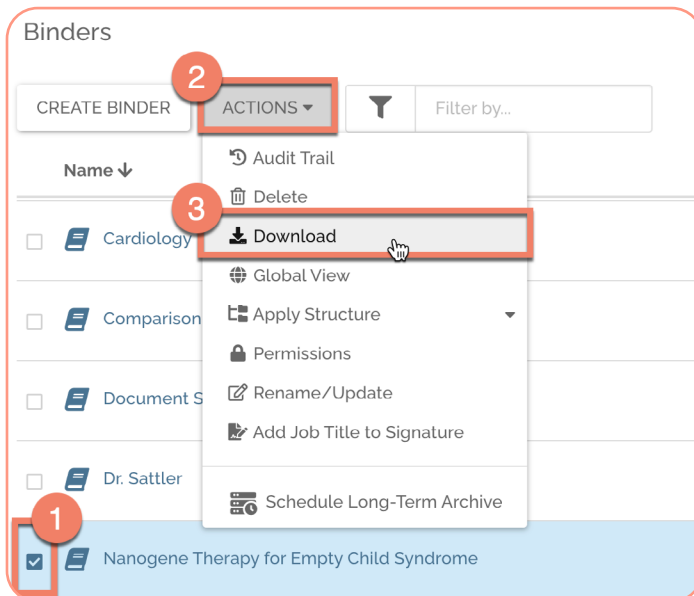
Option 2: Downloading Non-Archived Binders

If your site prefers not to use the LTA feature, you can instead download binders at study closeout without having to archive them first.

To do this, your role must be assigned the correct permissions in order to download a binder and all of its contents.

To download a binder, check the box beside the Binder name, then go to **Actions | Download**.

*Note: Don't see the **Download** option? Your role likely doesn't have the required permissions to download this Binder. Reach out to your Site Admin for assistance.*



In the popup, you can change the download settings if you like. Otherwise, click **Start Download**.

Binder Download Options

Select the options that you want to include in the download of Binder **Nanogene Therapy for Empty Child Syndrome**

File Size:

Original ?

Reduced ?

Signature Addendum Page:

If included, all signed Document(s) will be downloaded with a Signature Addendum Page.

Include

Do Not Include

Document Version:

Select "Current Version" to download the latest document version or "All Versions" to download all document versions.

Current Version

All Versions

Depending on your browser settings, your downloaded binder will be available as a zip file in your browser downloads and also under **My Downloads** in Florence.

Additionally, you can download the Audit Trail for the binder separately from the binder itself.

To do this, check the binder, go to **Actions**, and click **Audit Trail**.

The screenshot shows the 'Binders' interface. At the top, there is a 'CREATE BINDER' button and an 'ACTIONS' dropdown menu. A red circle with the number '2' highlights the 'ACTIONS' dropdown. Below the dropdown, a list of binders is shown. The first binder, 'Cardiology', is selected, indicated by a checkmark in a box and a red circle with the number '1'. A red circle with the number '3' highlights the 'Audit Trail' option in the 'ACTIONS' dropdown menu. Other options in the dropdown include 'Delete', 'Download', 'Global View', 'Apply Structure', 'Permissions', 'Rename/Update', 'Add Job Title to Signature', and 'Schedule Long-Term Archive'.

Under the Audit Trail, click **Download as CSV** or **Download as PDF** depending on your preference.

Audit Trail ✕

Customer Success Training / Cardiology Department

NAME ▾ Filter by...

Download as CSV Download as PDF

Name	Action	Who ↓	When ↓
Cardiology Department/Study 123/15. Study Subject Information/15.4. Subject Eligibility Forms and Worksheets/EHRTTest Version: 3	Document Viewed	Colleen Toliver - colleen.toliver@florencehc.com	02-Oct-2024 @ 9:46 AM EDT

Your file will then be available under **My Downloads**. Depending on your browser and browser settings, the audit trail will also download to your computer's **Downloads** folder. It will be named after the binder (i.e. Cardiology Department.csv).

Want to Learn More?

You can view our Help Desk article completing long-term archiving [here](#).

A common FAQs article is located [here](#).

More on non-LTA site close-out tips [here](#).



Proprietary and Confidential

florencehc.com