APPLICABLE TO:

- ● Administrators
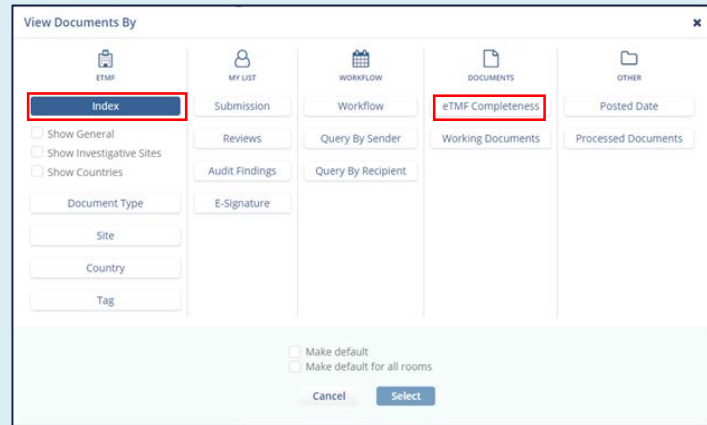- ● Editors
- ○ Readers

- ● eTMF
- ○ Study Start-Up
- ○ myTI

1. Enter a room and navigate to the Documents module.

2. Use the view filter to change the view if necessary.

Documents can be dragged for uploading to either the **Index** or **eTMF Completeness** view.
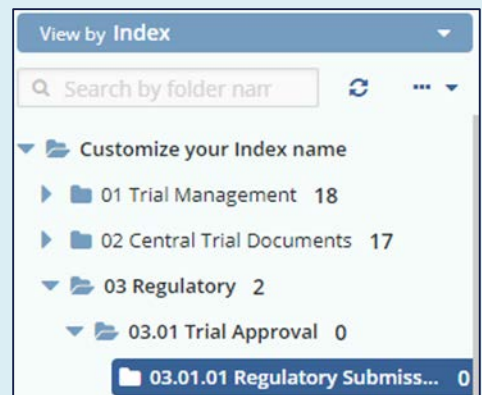
Dragging a document into the eTMF, does not bypass any room QC Workflow requirements.

Dropping into the Index View
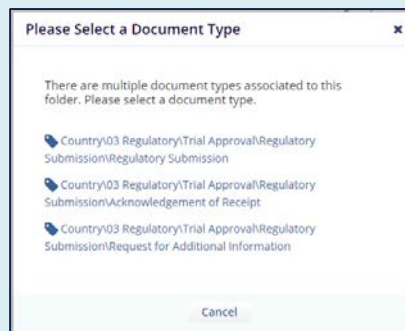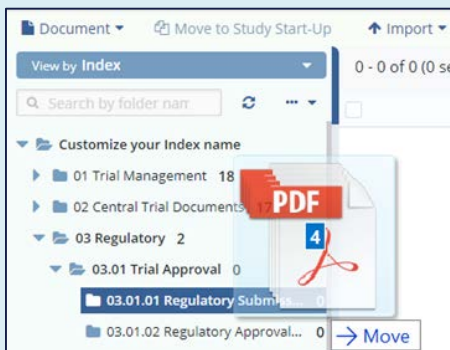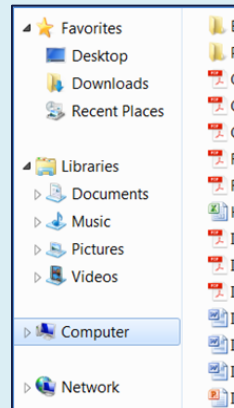
3. Drill down to the desired folder.

Documents dropped to the Index will appear in their destination folder or the Staging folder depending upon room settings. They will not be published as final until approved in the Workflow.

4a. Locate the file(s) to be uploaded on your computer and open the folder.

4b. Drag and drop the file(s) to the destination index folder

TI will offer to code documents based on document types normally coded to the selected folder. Choose a document type or press Cancel to skip this step.

4c. Complete any required fields based on the chosen document type.
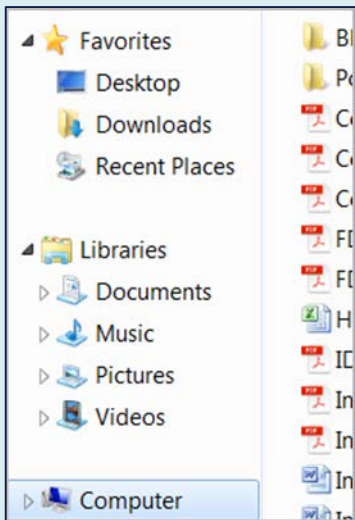
For single document upload

Click **Finish**

For multiple document upload

Click **Import and Apply Metadata**

Dropping onto the eTMF Completeness view

5a. To drag to **eTMF Completeness**, locate and select the document's final location.

5b. Locate the file(s) to be uploaded on your computer and open the folder.

5c. Drag and drop the file to the correct missing required document or placeholder.

Only one file can be added per placeholder/ missing document.

5d. Complete any required fields based on the selected document type and click **Finish** when done.