TRIAL INTERACTIVE

How to Upload a Document

Applicable to: ☑ Administrators   ☑ Editors   ☐ Readers   ☑ eTMF   ☐ Study Start-up

1. Navigate to the eTMF and select the Documents module.

*Note: This job aid is not a comprehensive discussion of all possible upload methods.

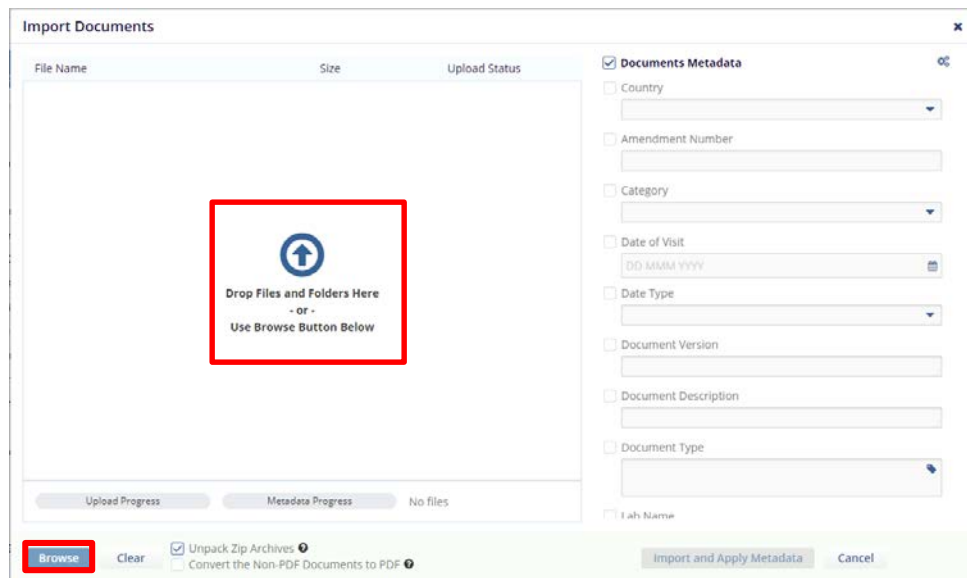**2. Click the Import button above the grid and select Documents.**

3. Drag and drop to the Import window,

Click on the arrow,

or

Click Browse to access files on your computer.

Steps 4a and b are optional.

4a. Add Metadata by clicking the **Documents Metadata** checkbox and complete any additional fields.

click **Import and Apply Coding.**

4b. If metadata is added, a message will pop up to confirm the following documents will be uploaded with the metadata fields populated.

5. The documents are now available for review in the uploader's folder.

Documents can also be seen using the **Submission** view of the Documents Module.

For any additional assistance, click … ❓ Help 📄 Guide