T R I A L INTERACTIVE

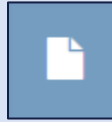**APPLICABLE TO:**

● Administrators   ○ eTMF

● Editors   ● Content Management

○ Readers   ○ myTI

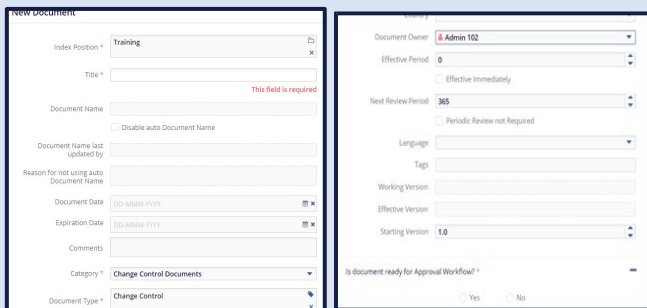1. Login to a Collaborative Workspace room and navigate to the **Index View** of the **Documents** module.

⭐ Training Team Collaborate Room ▾
Collaborative Workspace / Documents Library

📄 Document ▾   🔒 Manage Security   ⬆ Import ▾

View by Index   0 - 0 of 0 (0

View Documents By

🔧
DOCUMENT REPOSITORY

Index
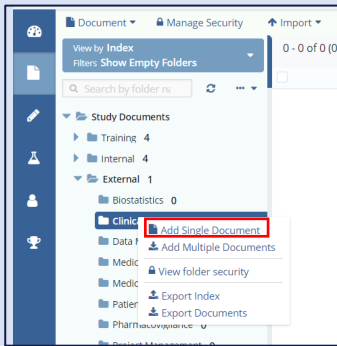
2. Right click on the desired folder in which to add a new **Document** and click **Add Single Document.**
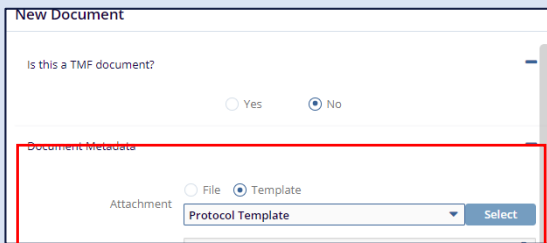
3. Check **Template** and select from the available template options and click **Select**.

New Document

Is this a TMF document?

○ Yes   ● No

Document Metadata

Attachment   ○ File ● Template

Protocol Template   [Select]

4. Fill out required fields and any remaining fields as desired.

5. Click **Finished** to create the document.

Note: A template with data injection fields will be able to automatically populate values based on the metadata applied to the document

TRANSPERFECT