

APPLICABLE TO:

- Administrators
- Room Managers
- Editors
- Readers
- Collaborate
- eISF

1. Navigate to the **Documents Library**.

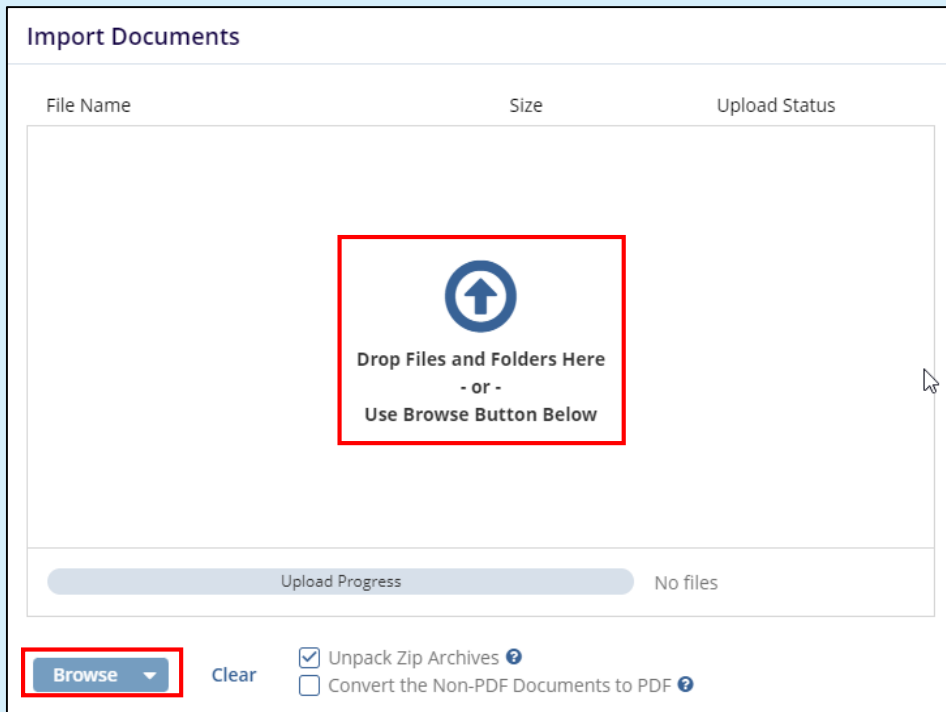


Upload method 1

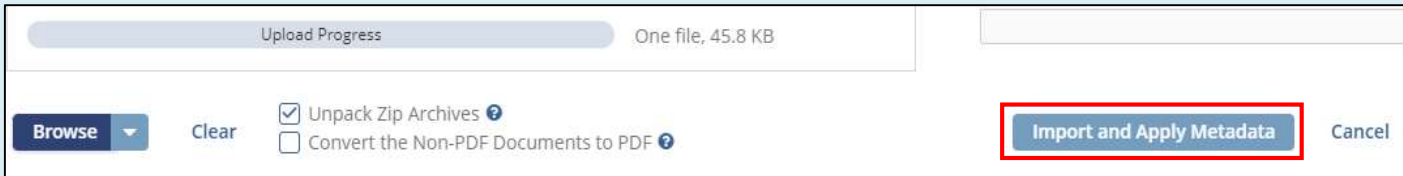
2. Click **Import** in the actions bar above the grid, and select **Documents**.




3. Drag and drop a file/folder to the Import Documents window, or click **Browse** to access files on your computer.



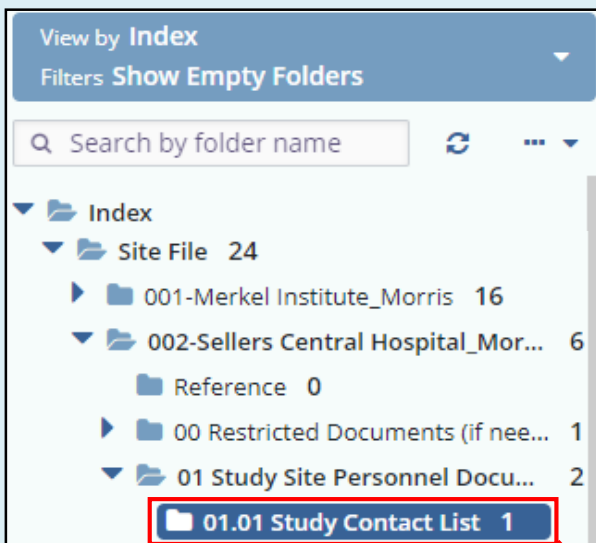
4. Select any options and metadata you wish to enable, then complete the upload by clicking on **Import and Apply Metadata**.



 Encrypted or password-protected files cannot be opened in Trial Interactive. As a best practice recommendation, such files should not be uploaded to an eTMF.

Upload method 2

5. You can upload documents to a specific folder in the Index. In that case, documents will immediately inherit the metadata relevant to that specific folder.

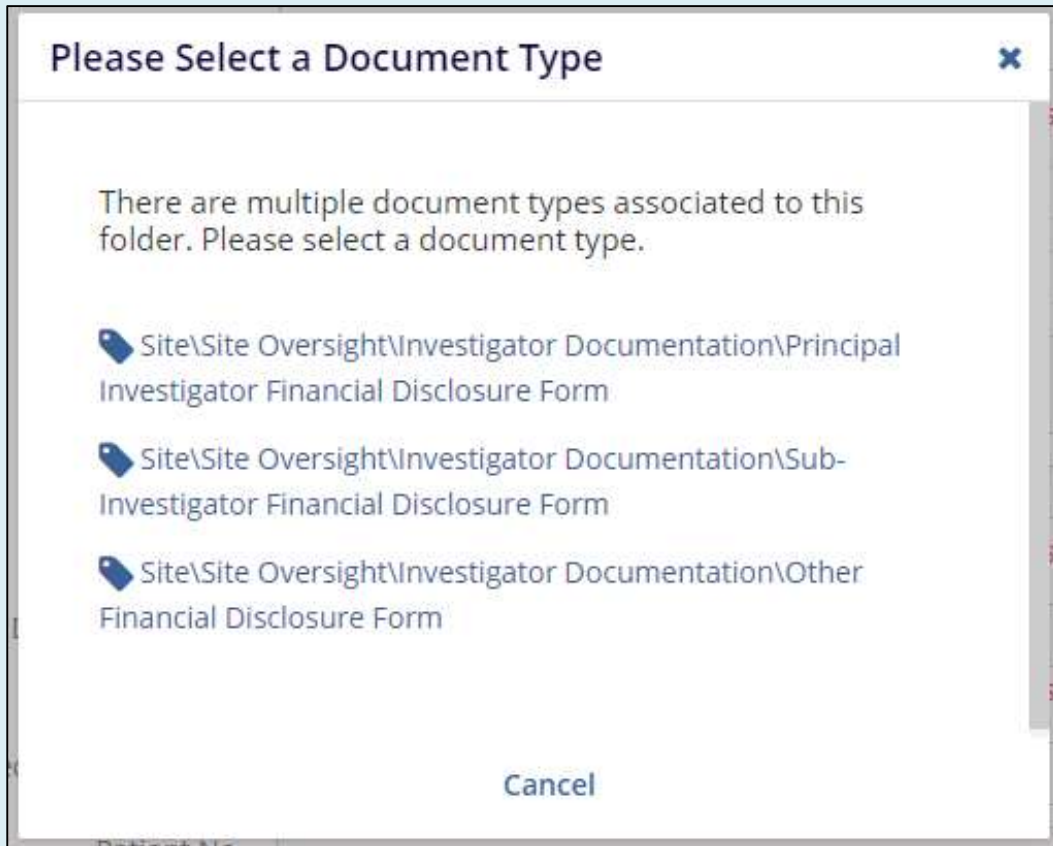


6. First, make sure you are using an **Index** View. Select a specific **folder**, then right-click on the folder name.

7. You can choose to upload a single document, or multiple documents at a time.

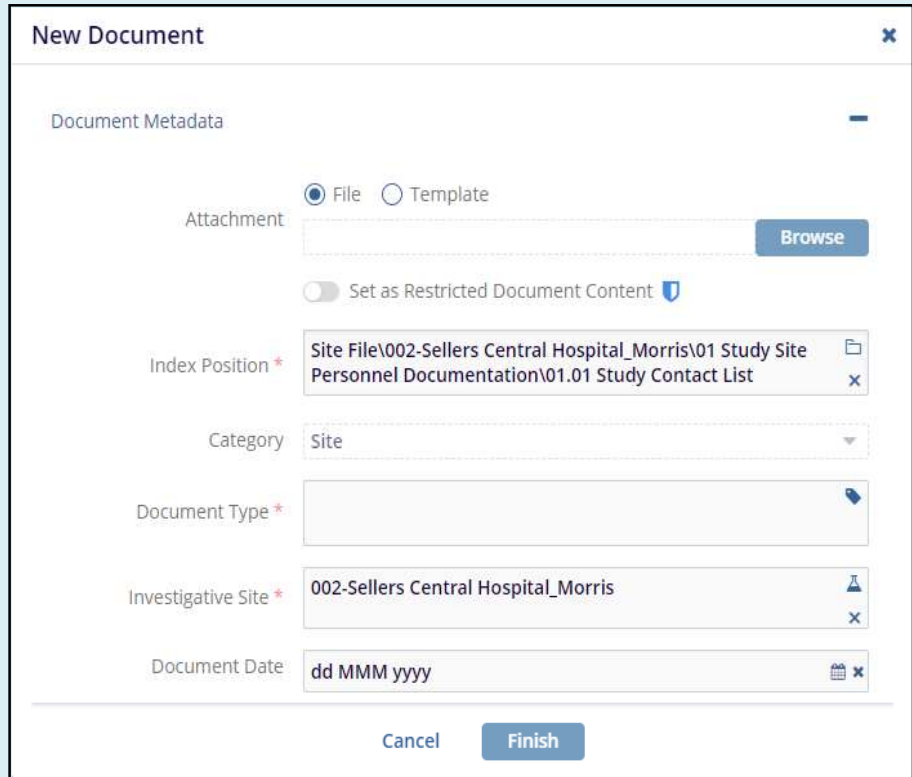


8a. Selecting **Add Single Document** will open the New Document dialog. If the folder you are uploading to supports multiple doc types, you will be prompted to select the appropriate one from a list.



8b. Use **Browse** to select the file you wish to upload, or switch to the **Template** radio button if you want to create a new document based on in-room templates.

Click **Finish** to perform the upload.



9. If you choose to **Add Multiple Documents**, select doc type if prompted to, then follow steps 3) and 4) of this guide after clicking.

Please Select a Document Type

There are multiple document types associated to this folder. Please select a document type.

-  Site\Site Oversight\Investigator Documentation\Principal Investigator Financial Disclosure Form
-  Site\Site Oversight\Investigator Documentation\Sub-Investigator Financial Disclosure Form

 Add Single Document

 **Add Multiple Documents**