How to Upload Documents in Collaborate
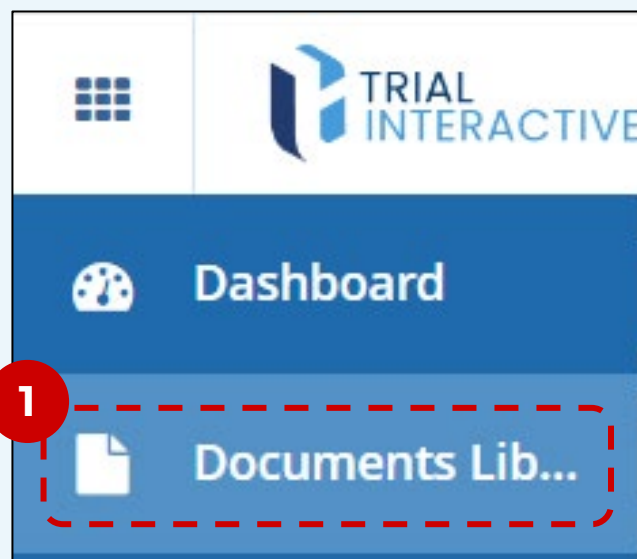
TI version 10.6

TRIAL INTERACTIVE

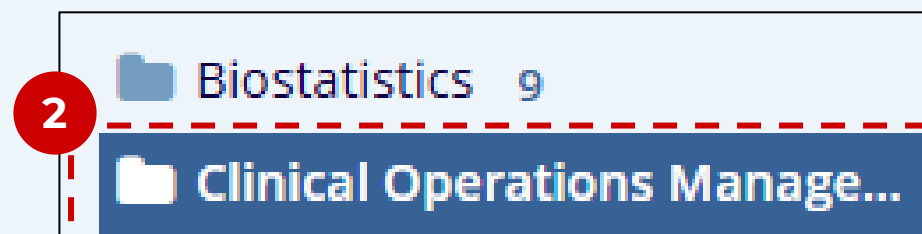**APPLICABLE TO:**

- ● Admin
- ● Manager
- ● Editor
- ○ Reader

- ● Collaborate
- ● eISF

Upload method 1

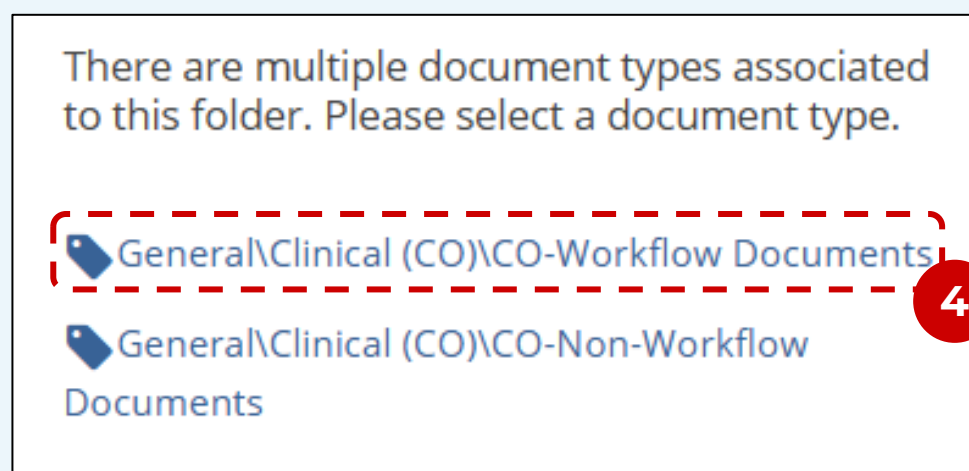**1** Navigate to the **Documents Library**.

2 Select the appropriate folder. Drag&Drop your document into the grid, or **right-click** the folder name.

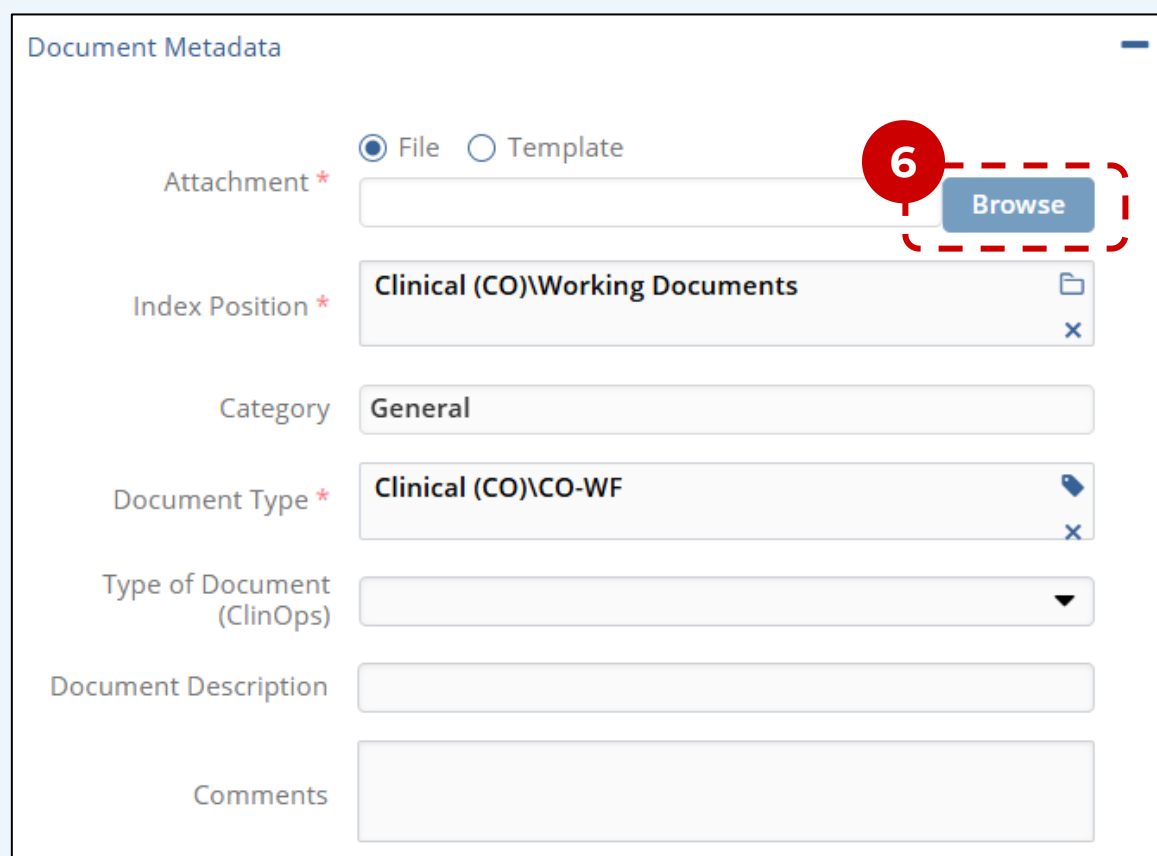**3** Choose the **Add Single Document** option.

4 You may be prompted to select a document type. Just **click** on the option relevant to the document.

TRANSPERFECT
LIFE SCIENCES

5 **Browse** for a file to upload and complete the required and optional metadata fields. These vary based on room type/configuration.

Document Metadata

Attachment * ● File ○ Template

6 Browse

Index Position * Clinical (CO)\Working Documents

Category General
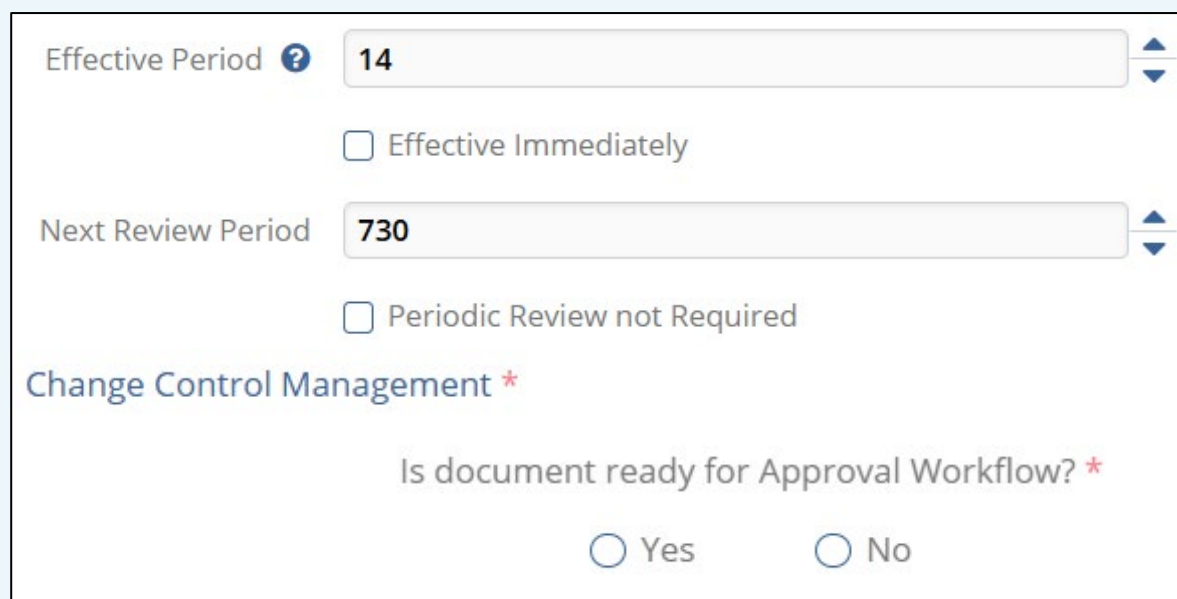
Document Type * Clinical (CO)\CO-WF

Type of Document (ClinOps)

Document Description

Comments

6 (not applicable to eISF) For certain controlled document types, you may have additional options regarding effectiveness and readiness to start the workflow.

Effective Period ? 14

☐ Effective Immediately

Next Review Period 730

☐ Periodic Review not Required

Change Control Management *

Is document ready for Approval Workflow? *

○ Yes ○ No

7 Click **Finish** to upload the document.

7 Cancel Finish

Upload method 2

Best for multiple documents.

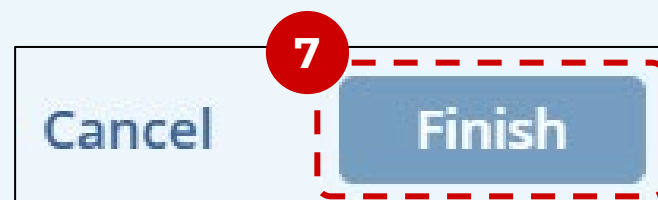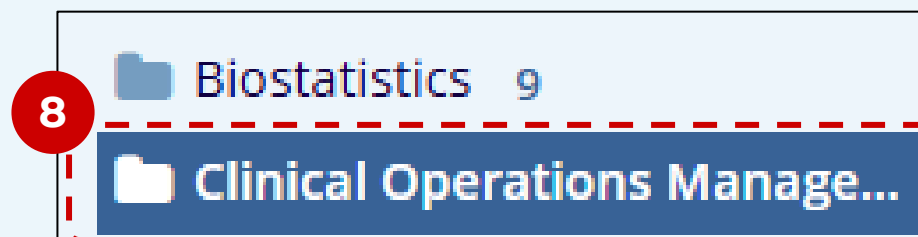**8** Select the appropriate folder.
Drag&Drop your documents into the grid.

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Biostatistics 9

Clinical Operations Manage...

9 The multi-document import window looks different but the process is similar.
There are no requirements for specific metadata to be filled.
Options to unpack compressed folders and convert to PDF are present.
Click Import **All & Apply Metadata** to finalize.

Import Documents ✕

Fill metadata or Assign Placeholders
Select Documents to Import them with/without Metadata or with assigned placeholders. Your progress with deselected attachments will remain.

🗑 Remove   📄 Browse File   ⬆ Browse Folders

3 Documents 0 selected

	Document	Size	Import Status	Placeholder
☐	📄 Example_Bud...	15.4 KB	NOT IMPORTED	
☐	📄 List of produc...	10.0 KB	NOT IMPORTED	
☐	📄 IRB Approval ...	32.5 KB	NOT IMPORTED	

Fill Metadata **Assign Placeholders**

Metadata ⊗ Clear All

Index Position
Controlled Documents\Document 🗁
Change Requests
✕

Category ❓
Corporate & Departmental ▼

Document Type ❓
Procedural Documents\DCR 🏷
✕

IRB/EC
▼

Document Owner ❓
👤 Lorenzo Vanzetto ▼

Starting Version ❓
0.1 ▲▼

Controlled Document Type ❓

☐ Unpack Zip Archives ⓘ   ☐ Convert Non-PDF files to PDF ⓘ

Cancel   **Import All & Apply Metadata**

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