How to Upload Documents

**TI version 10.6**

TRIAL INTERACTIVE

APPLICABLE TO:

● Admin
● Manager
● Editor
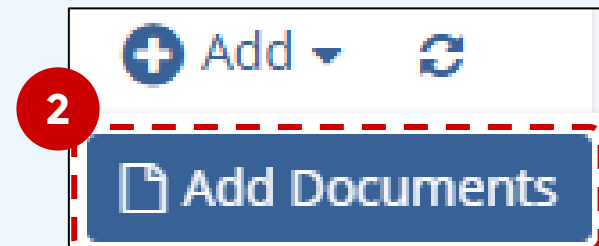○ Reader

● eTMF
● Collaborate

Home Screen Upload

This method is convenient when the uploader has multiple documents but no specific need to configure their location or their metadata in the room. Documents will be stored in the **Upload** system folder.
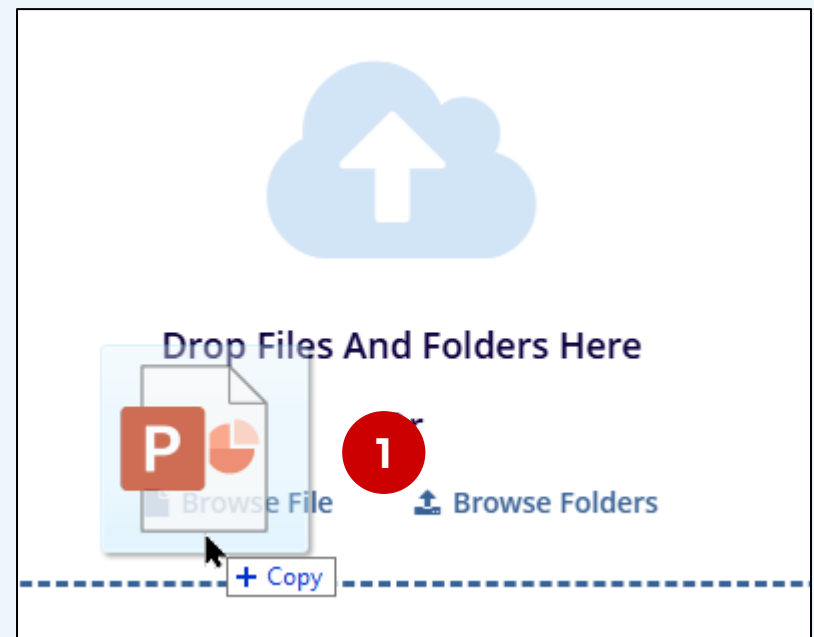
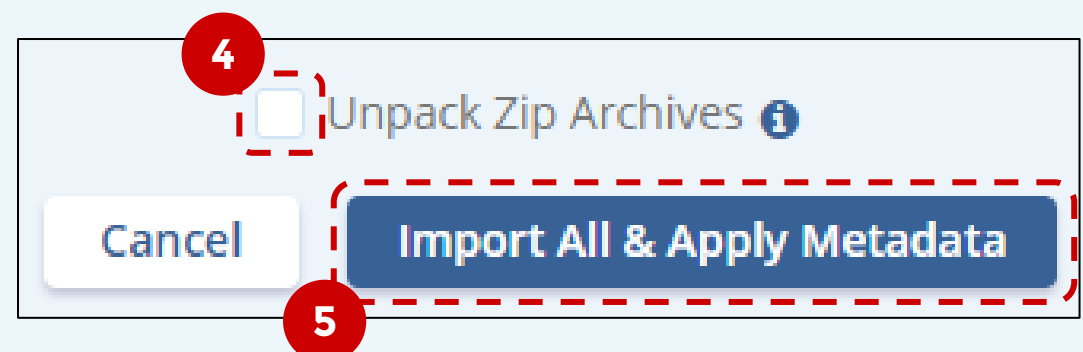**1** In the **Home** page, locate the Add button for a room.

Trialinteractive
DEMO

1

| Tasks | Reports | Home |
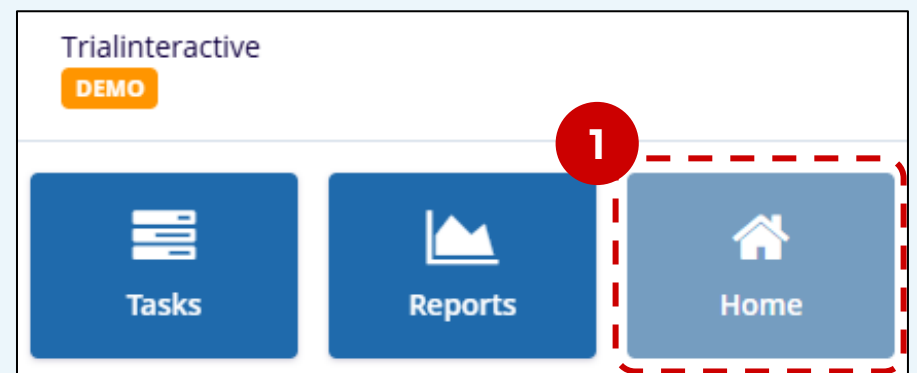
2 Click on **Add Documents**.

⊕ Add ▾   ↻

2

📄 Add Documents

3 <u>Drag</u> or select via <u>browse</u> one or more documents to the upload window interface.

Drop Files And Folders Here

1

📄 Browse File   ⬆ Browse Folders

+ Copy

4 Optional: set the import to auto-unpack zip files.

4

☐ Unpack Zip Archives ⓘ

5 Click **Import All & Apply Metadata** to finalize.

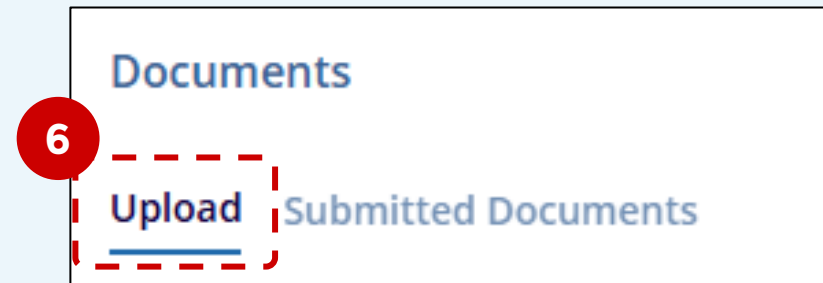Cancel   **Import All & Apply Metadata**

5

Dashboard Upload

This method mirrors the previous one: it provides no additional metadata, and the documents are stored in the **Upload** system folder. It must be enabled for the specific study/room to be visible.
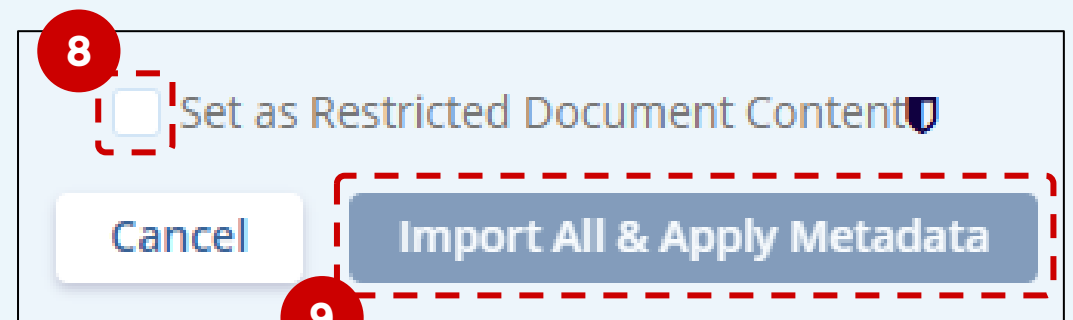
6 Locate the **Upload** dashlet.

📝 Pro Tip: the dashlet may be hidden. Use Edit Dashboard to search for and if present, enable it.

7 **Drag** documents onto the upload area (or click on the cloud icon to browse device contents).

8 Optional: in rooms enabled for Redaction, you can lock the document to hide its content using the **Set as Restricted Content** button.

9 Review your list of documents, and click **Import All & Apply Metadata** to finalize.

Upload via Add Button

Available anytime while in a room, the <u>Add button</u> is a flexible method. It provides the ability to define metadata, or not, and define documents' destination folder.
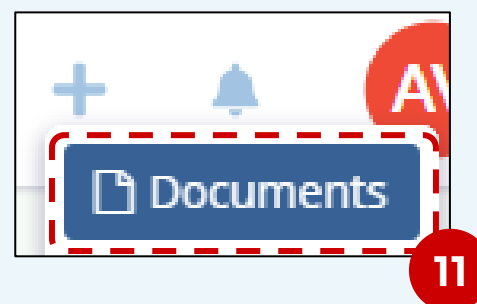These options are subject to configuration for their availability.
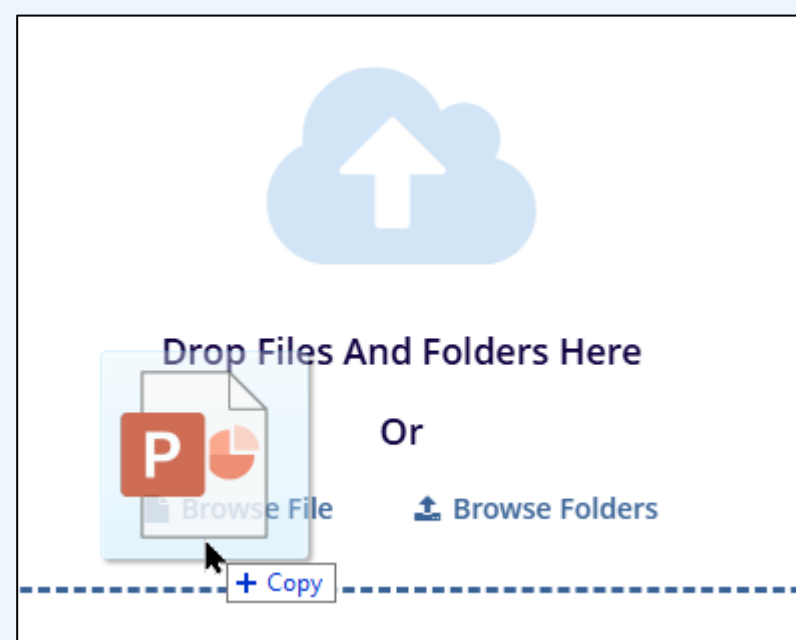The default destination for documents is usually the **Staging** folder.

10 Locate the **Add button**, near the username display, and click.
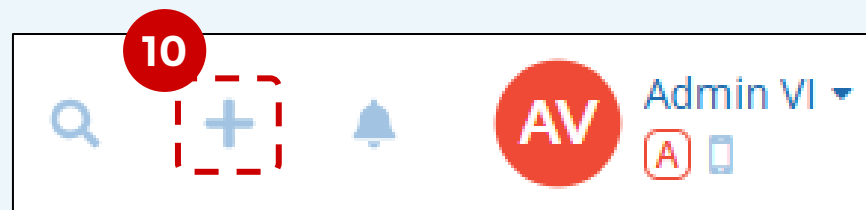
11 Select the option for **Documents**.

12 <u>Drag</u> or select via <u>browse</u> one or more documents.

Drop Files And Folders Here

Or

Browse File   Browse Folders

13 (Where enabled) select **Fill Metadata** or **Assign Placeholders** and complete the respective fields to match new documents with metadata and, for placeholders only, a specific location.

Fill Metadata   Assign Placeholders

Metadata   Clear All

Metadata

Set as Restricted Document Content

Event

Category

TRIAL INTERACTIVE
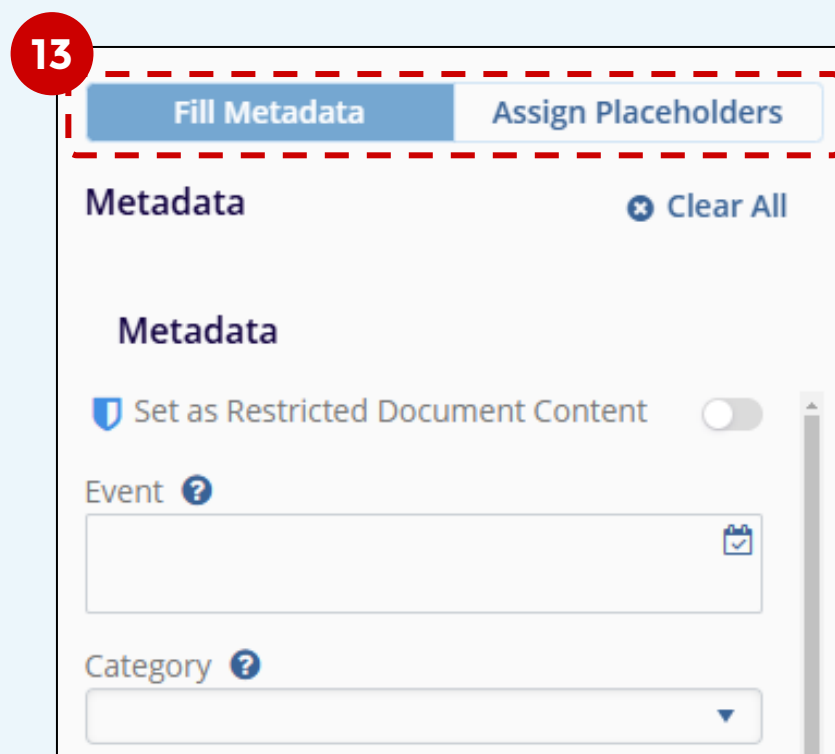
14 Optionally enable features at the bottom: **Unpack Zip Archives** and/or **Convert to PDF**.

14

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

Cancel   **Import All & Apply Metadata**

15
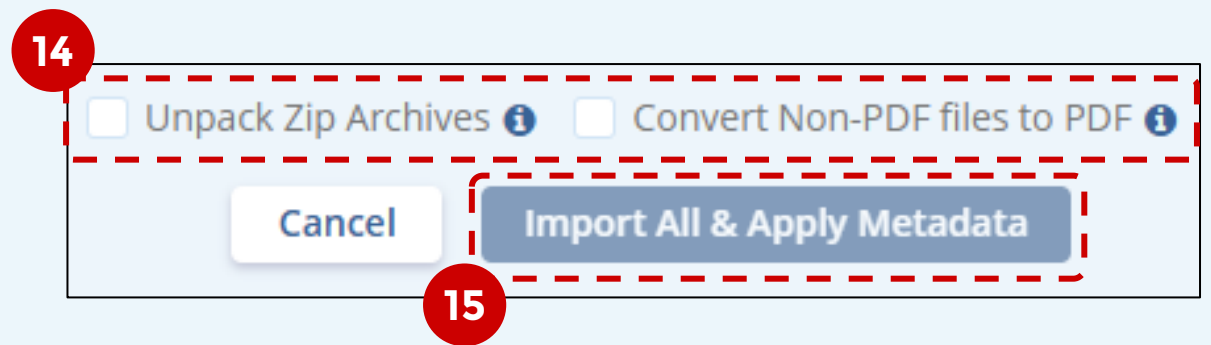
15 Review your list of documents, and click **Import All & Apply Metadata** to finalize.

Import to Documents View

The ribbon in the Documents module offers two upload points: the **Add Document** function covered here –which allows for a single, full-metadata, document upload; and the *Import Documents* function –which works exactly like the previous method via the Add button, but may change upload location based on current selected folder.
Some views in the module do not offer these upload options.

16 Navigate to the **Documents** module.

🎛 Dashboard

16
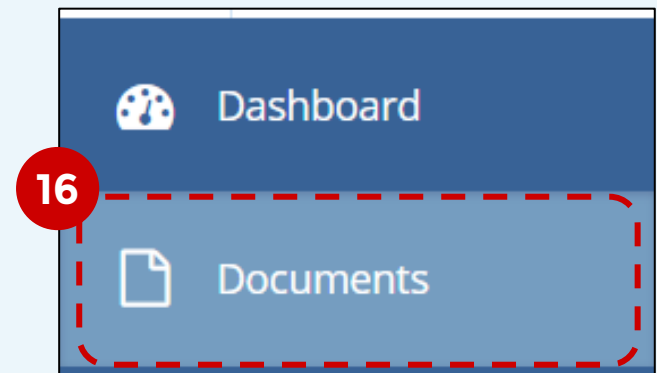
📄 Documents

17 Expand Document in the ribbon, and click **Add Document**.

📄 Document ▾   🗄 Mass Coding

17
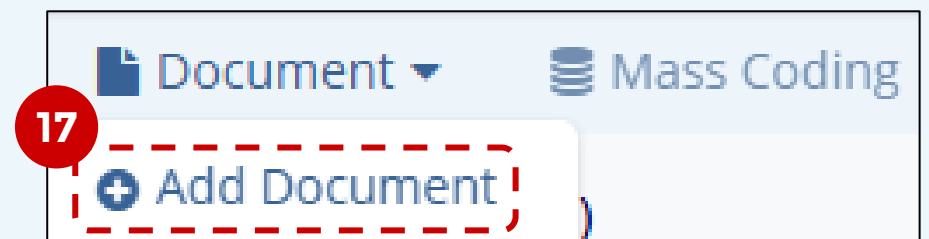
➕ Add Document

18 In the Add window, start by selecting a document with **Browse**.

◉ File ○ URL

Attachment *

Browse

18

TRIAL INTERACTIVE
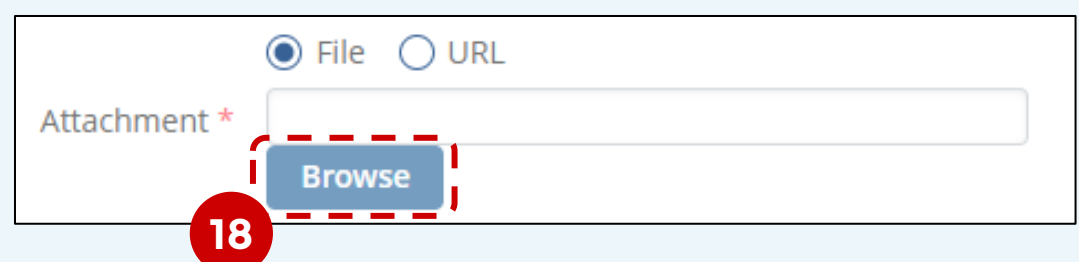
19 Fill the **required metadata fields**. These may vary. It is usually convenient to complete Document Type first.

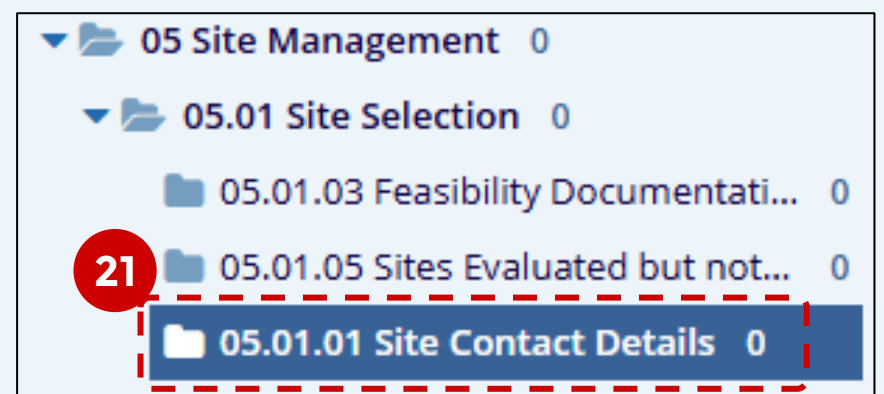| Category ❓* | ▼ |
Country ❓	▼
Document Type ❓*	❌ ▼
	🏷 Select
Submitted Name ❓	
Comments ❓	

20 Also complete discretional metadata fields, review, then click **Finish**.
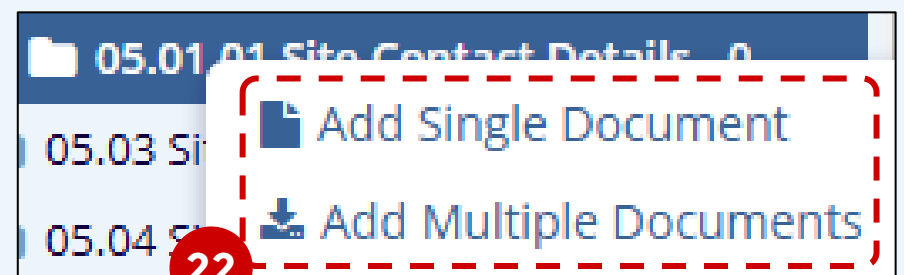
Finish

Targeted Upload

Some upload methods are (partially) self-configuring, drawing information from the room configuration rather than user-provided document info.

21 Select a **document folder** in the Index.

▼ 📂 05 Site Management 0
  ▼ 📂 05.01 Site Selection 0
      📁 05.01.03 Feasibility Documentati... 0
      📁 05.01.05 Sites Evaluated but not... 0
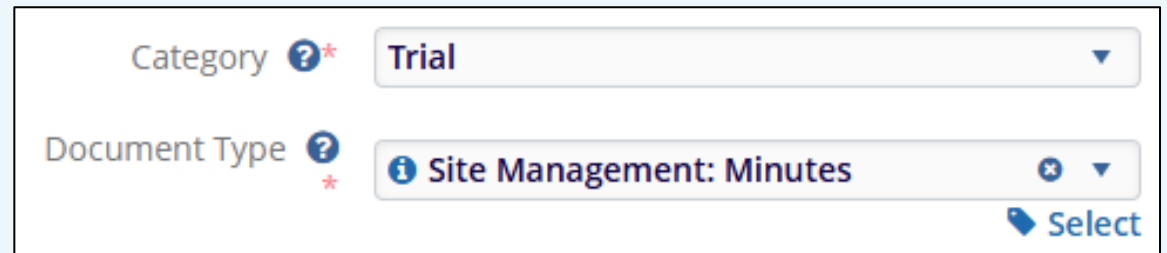   📁 05.01.01 Site Contact Details 0

22 Option 1: Use Add Document or Import Documents as previously described.
Option 2: **Right-click** on the folder name and select *one* of the Add options.

📁 05.01.01 Site Contact Details 0
05.03 Si
05.04 S

📄 Add Single Document
⬇ Add Multiple Documents

23 In many cases, a <u>Document Type selection</u> dialog opens. **Select one** option to advance.

Please Select A Document Type ✖

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

🏷 Trial\05 Site Management\05.05 General\05.05.03 Meeting Material\Site Management: Agenda

🏷 Trial\05 Site Management\05.05 General\05.05.03 Meeting Material\Site Management: Minutes

🏷 Trial\05 Site Management\05.05 General\05.05.03 Meeting Material\Site Management: Attendance Sheet

24 Most of the basic metadata fields auto-complete (varies per room configuration).

Category ❓* Trial ▼

Document Type ❓
* ℹ Site Management: Minutes ✖ ▼
🏷 Select

25 Complete the metadata as necessary and click **Finish** to upload (**Import All & Apply Metadata** for multiple documents import).

Cancel   Finish