

- 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

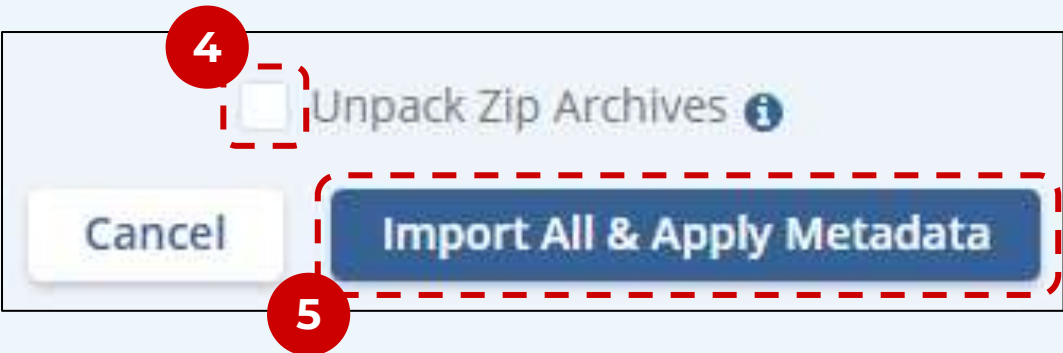
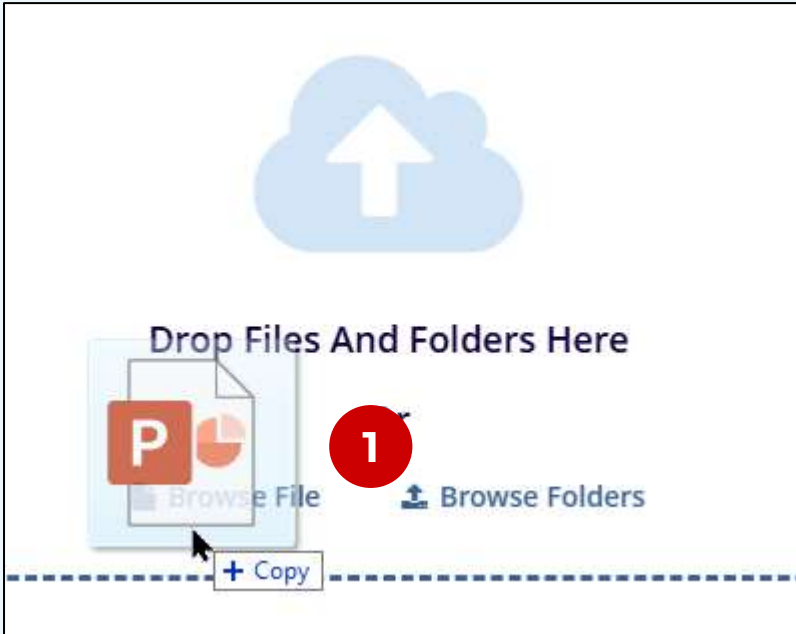
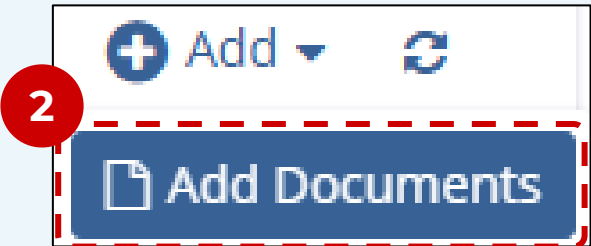
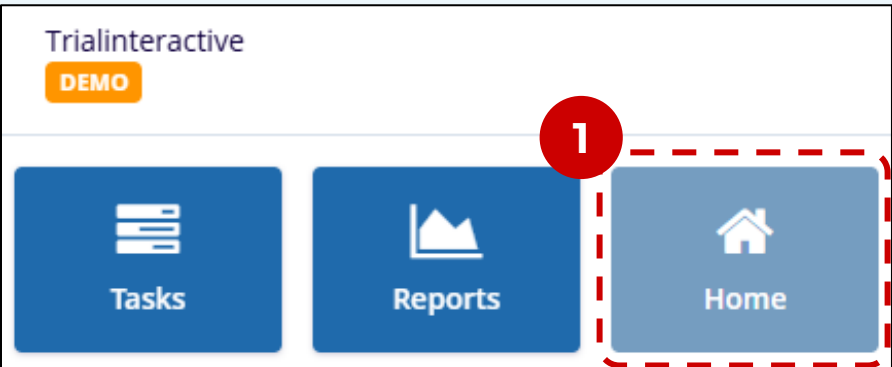
In the **Home** page, locate the Add button for a room.
- 2

Click on **Add Documents**.
- 3

Drag or select via browse one or more documents to the upload window interface.
- 4

Optional: set the import to auto-unpack zip files.
- 5

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



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.

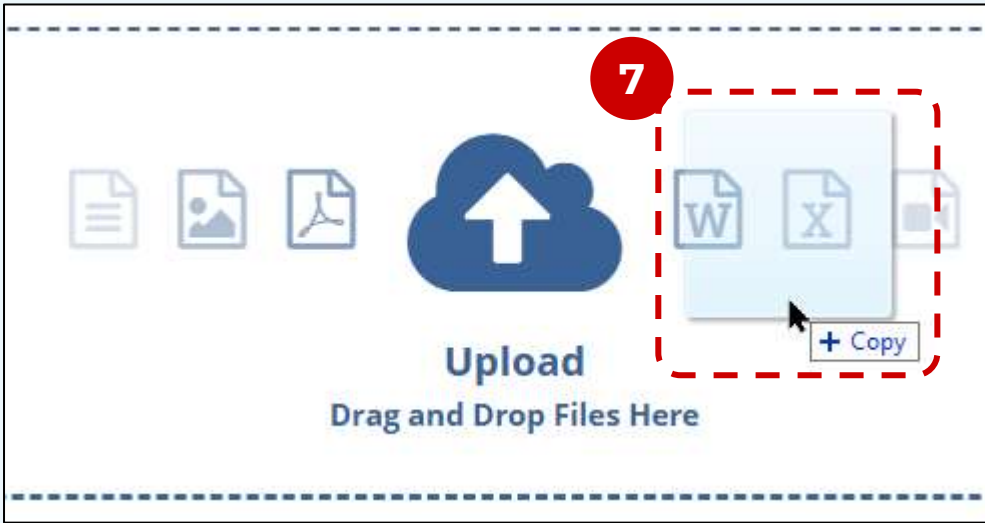
6 Locate the **Upload** dashlet.



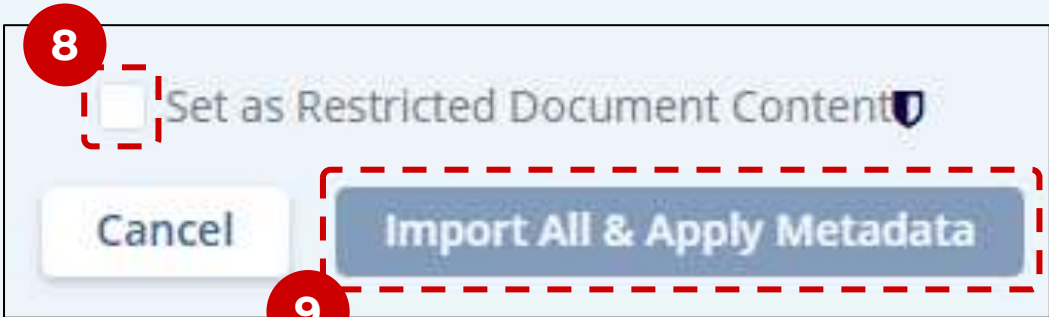
Pro Tip: the dashlet may be hidden. Use [Edit Dashboard](#) to search for and if present, enable it.



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.

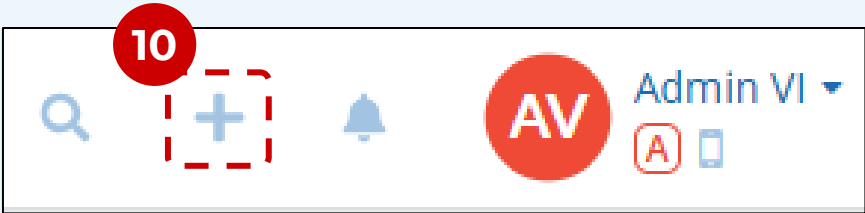


9 Review your list of documents, and click **Import All & Apply Metadata** to finalize.

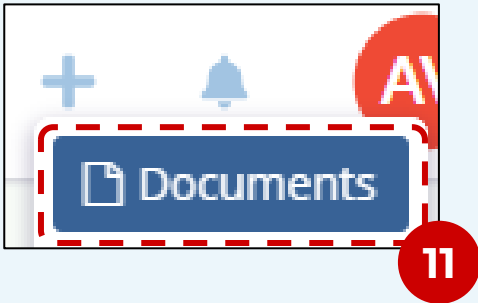
Upload via Add Button

Available anytime while in a room, the Add button 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.

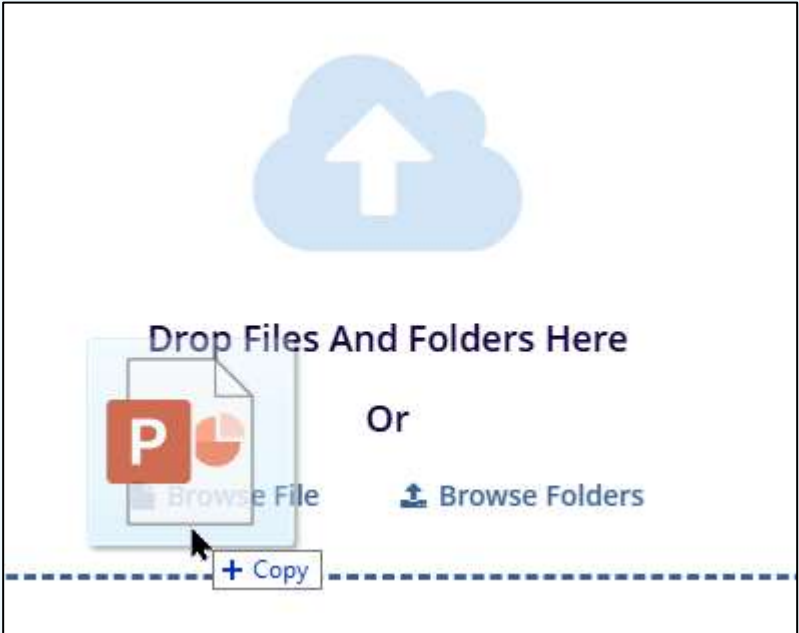
10 Locate the **Add button**, near the username display, and click.



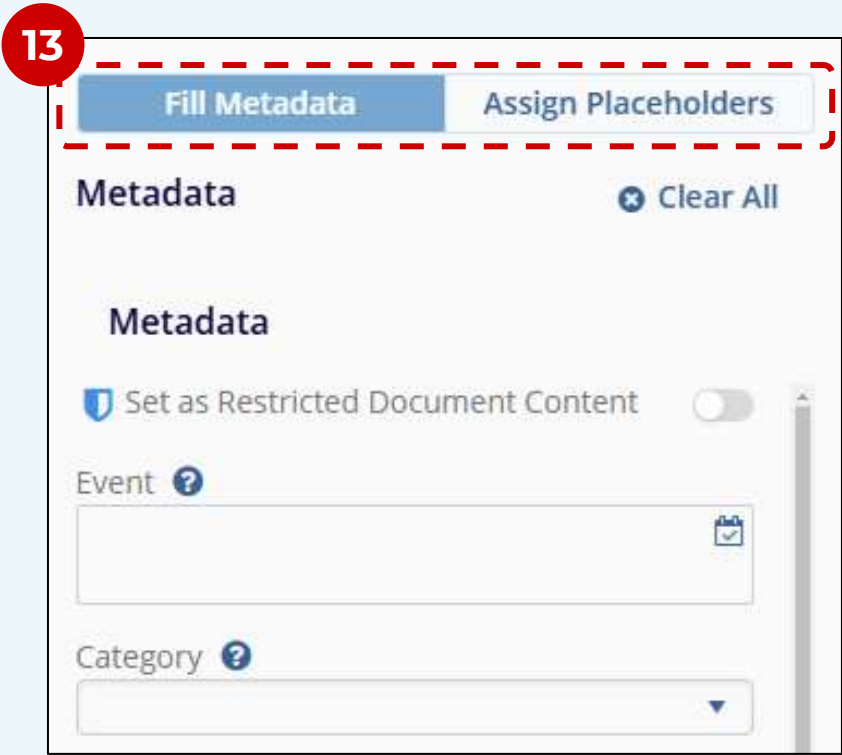
11 Select the option for **Documents**.



12 Drag or select via browse one or more documents.



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.



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

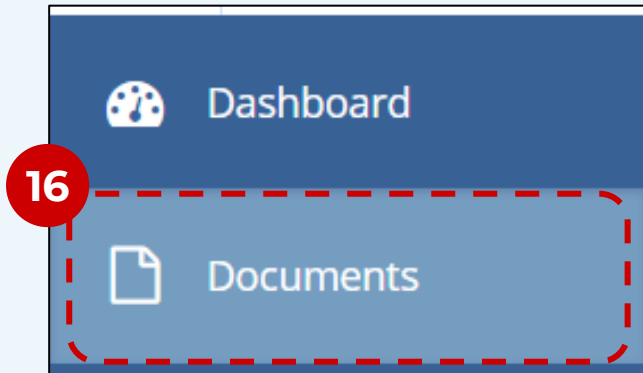
15 Review your list of documents, and click **Import All & Apply Metadata** to finalize.



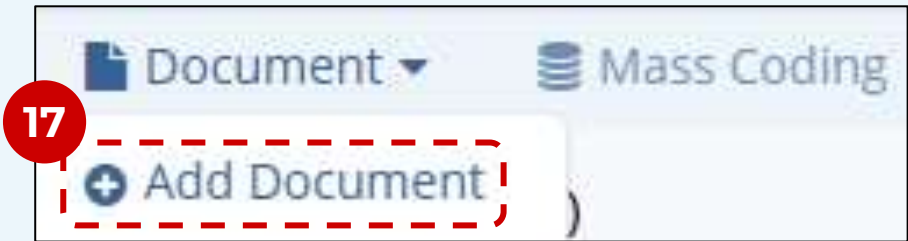
Import to Documents View

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.

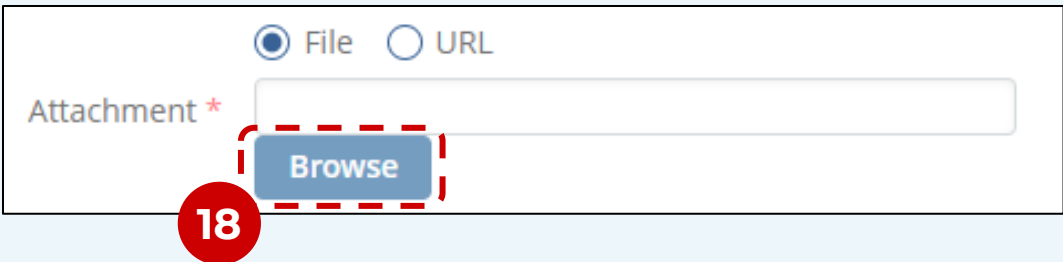
16 Navigate to the **Documents** module.



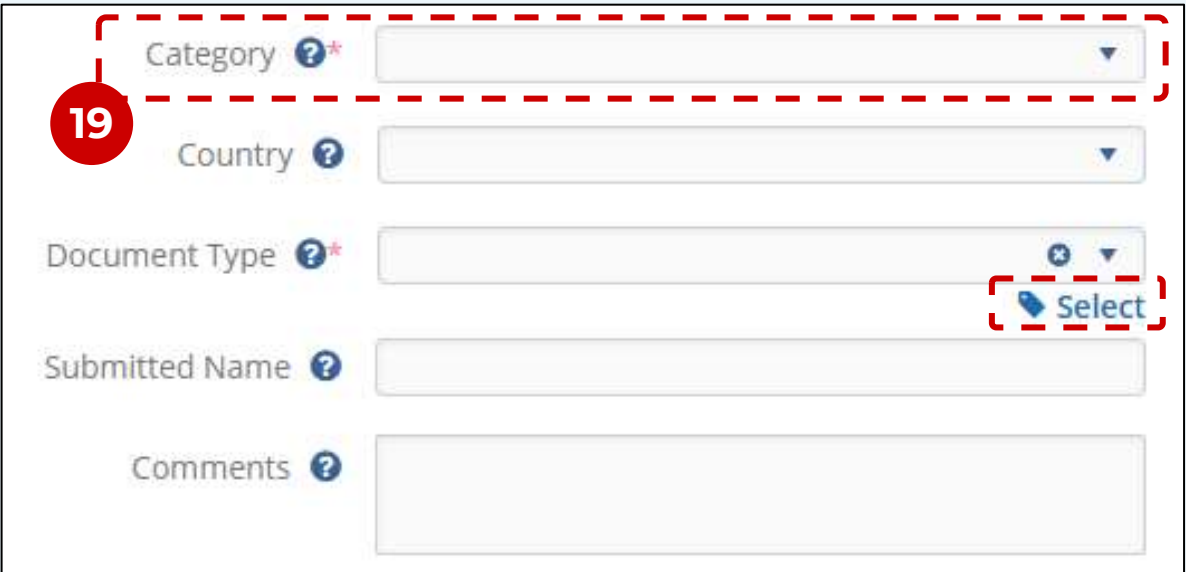
17 Expand Document in the ribbon, and click **Add Document**.



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

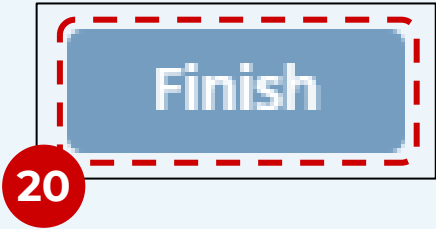


19 Fill the **required metadata fields**. These may vary. It is usually convenient to complete Document Type first.



A screenshot of a document upload form. A red dashed box highlights the 'Category' and 'Country' dropdown menus, with a red circle containing the number '19' next to it. Below these are the 'Document Type' dropdown menu (with a 'Select' button next to it), 'Submitted Name' text input, and 'Comments' text area. Each field has a question mark icon for help.

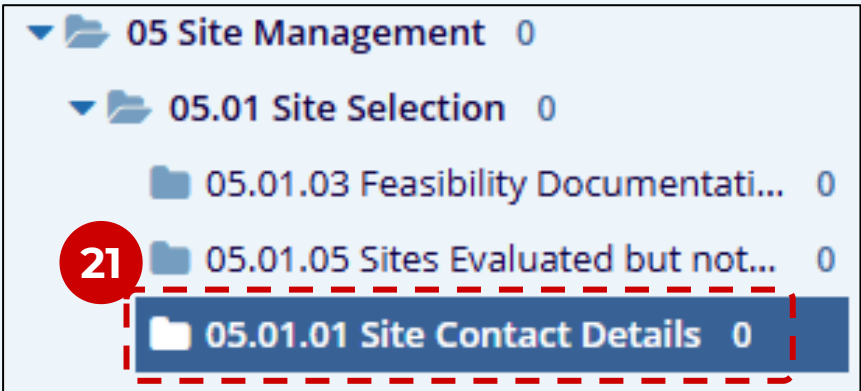
20 Also complete discretionary metadata fields, review, then click **Finish**.



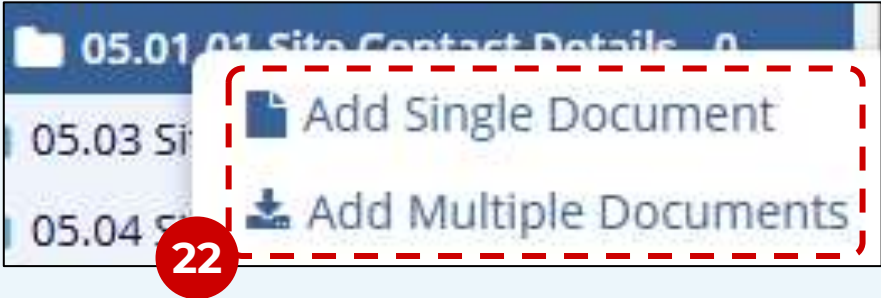
Targeted Upload

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

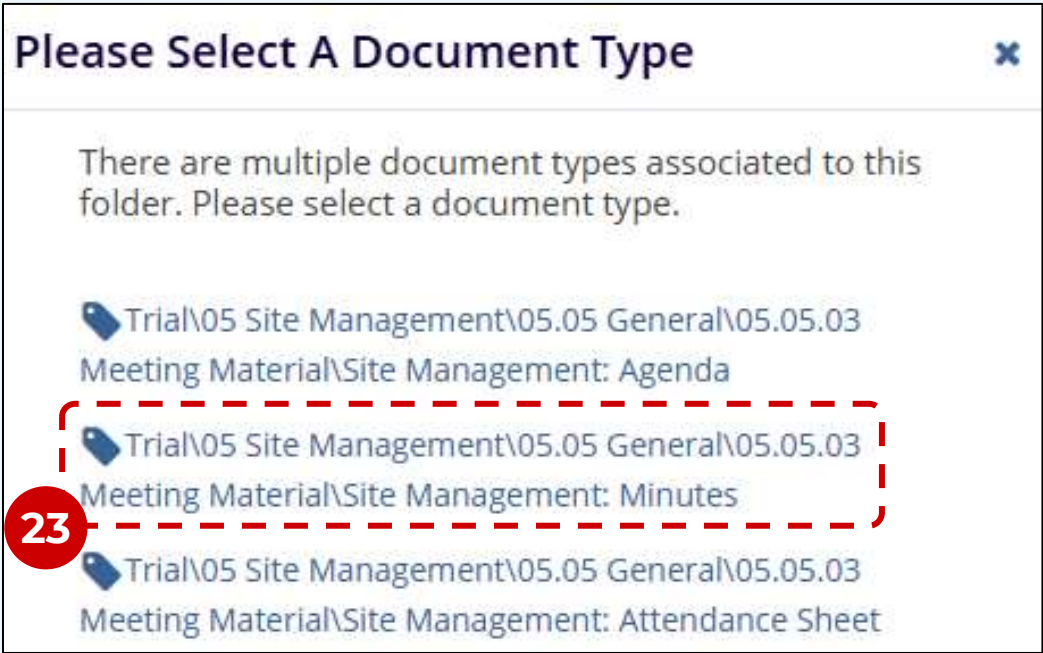
21 Select a **document folder** in the Index.



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.



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



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



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

