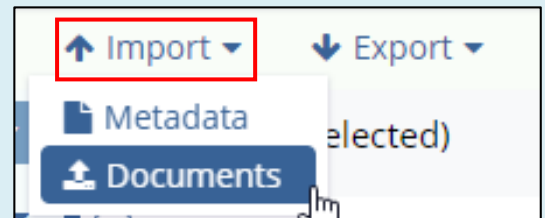**APPLICABLE TO:**

- ● Administrators
- ● Room Managers
- ● Editors
- ○ Readers

- ● Collaborate
- ● eISF

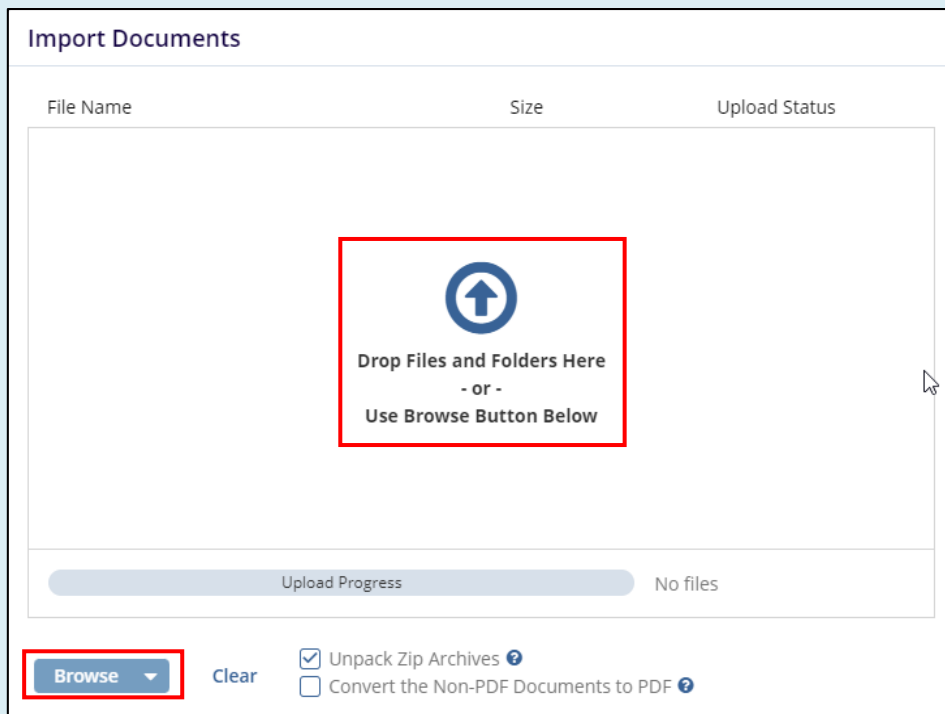## 1. Navigate to the **Documents Library**.
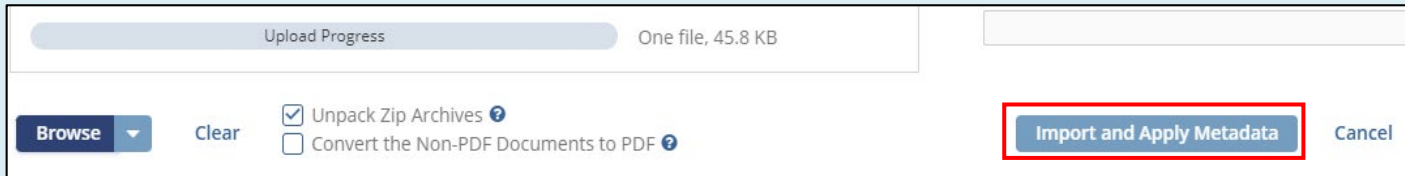
Upload method 1

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

⬆ Import ▾   ⬇ Export ▾

📄 Metadata
⬆ Documents   elected)

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

Import Documents

File Name	Size	Upload Status

⬆

Drop Files and Folders Here
- or -
Use Browse Button Below

Upload Progress   No files

Browse ▾   Clear   ☑ Unpack Zip Archives ❓
☐ Convert the Non-PDF Documents to PDF ❓

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

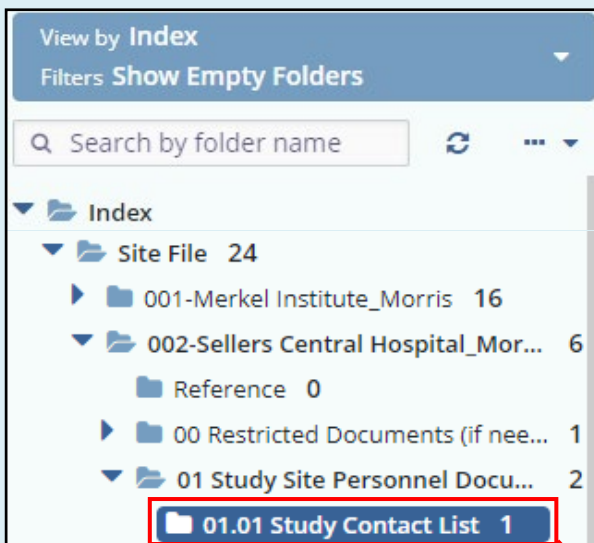| Upload Progress		One file, 45.8 KB		
Browse ▼	Clear	☑ Unpack Zip Archives ❓ ☐ Convert the Non-PDF Documents to PDF ❓	**Import and Apply Metadata**	Cancel

⚠️ **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..

View by **Index**
Filters **Show Empty Folders**

🔍 Search by folder name

▼ 📁 **Index**
　▼ 📁 Site File 24
　　▶ 📁 001-Merkel Institute_Morris 16
　　▼ 📁 002-Sellers Central Hospital_Mor... 6
　　　📁 Reference 0
　　▶ 📁 00 Restricted Documents (if nee... 1
　　▼ 📁 01 Study Site Personnel Docu... 2
　　　📁 **01.01 Study Contact List 1**

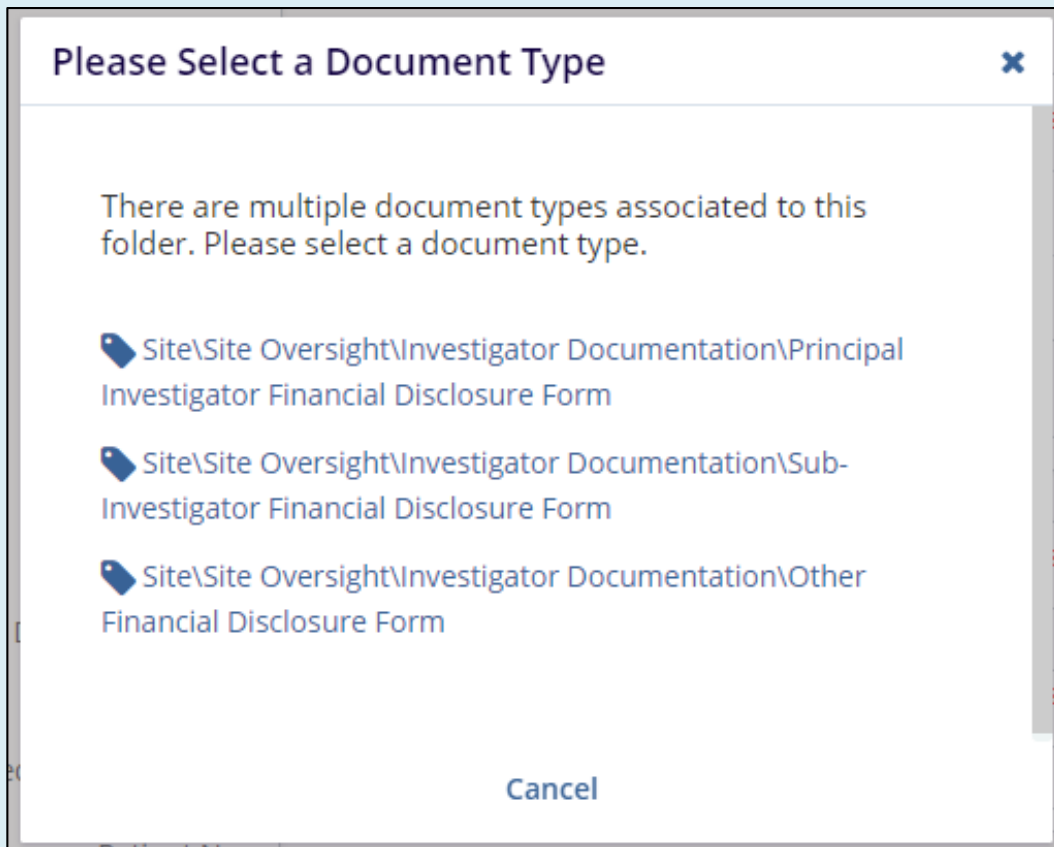**6. First, make sure you are using an Index View. Select a specific folder, then right-click on the folder name**

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

📄 Add Single Document
⬇ Add Multiple Documents

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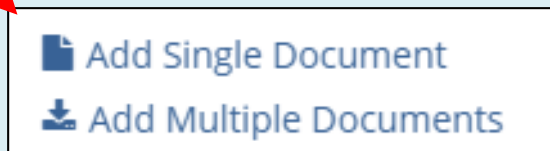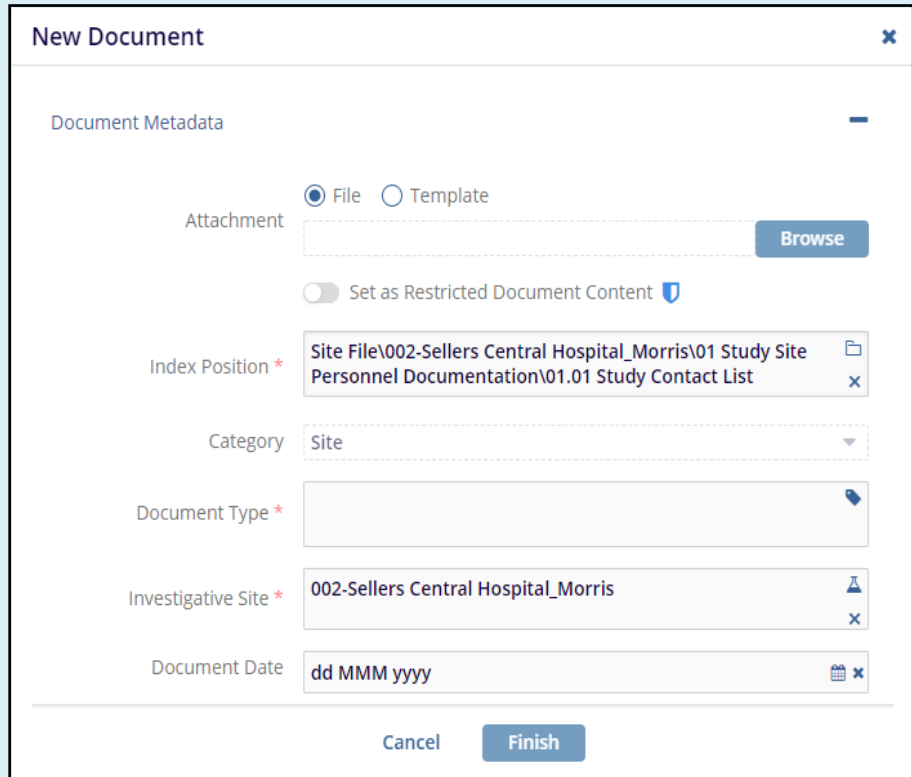
8a. Selecting **Add Single Document** will open the New Document dialog. If the folder you are uploading to supports multiple doc types, you will be prompted to select the appropriate one from a list

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

🏷 Site\Site Oversight\Investigator Documentation\Other Financial Disclosure Form

Cancel

T R I A L INTERACTIVE

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

New Document ✕

Document Metadata ―

Attachment   ⦿ File   ◯ Template

[ ]   [Browse]

⬤ Set as Restricted Document Content 🛡

Index Position *   Site File\002-Sellers Central Hospital_Morris\01 Study Site Personnel Documentation\01.01 Study Contact List   📁 ✕

Category   Site ▾

Document Type *   🏷

Investigative Site *   002-Sellers Central Hospital_Morris   ⚗ ✕

Document Date   dd MMM yyyy   📅 ✕

Cancel   [Finish]

9. If you choose to **Add Multiple Documents,** select doc type if appropriate, 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

TRANSPERFECT