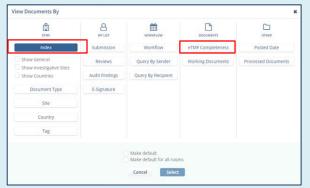




## 1. Enter a room and navigate to the Documents module.

 Use the view filter to change the view if necessary.
Documents can be dragged for uploading to either the Index or eTMF Completeness view.

\*Documents can also be dragged for uploading via the **Upload** dashlet on the Dashboard





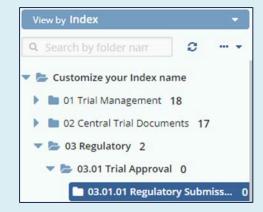
Dragging a document into the eTMF, does not bypass any room QC Workflow requirements.

### Dropping into the Index View

3. Drill down to the desired folder.



Documents dropped to the Index will appear in their destination folder or the Staging folder depending upon room settings. They will not be published as final until approved in the Workflow.





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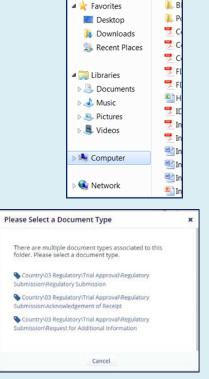


## How to Drag and Drop Documents When Uploading TI v 10.3

# 4a. Locate the file(s) to be uploaded on your computer and open the folder.

## 4b. Drag and drop the file(s) to the destination index folder

#### 



TI will offer to code documents based on document types normally coded to the selected folder. Choose a document type or press Cancel to skip this step.

4c. Complete any required fields based on the chosen document type.

## For single document upload

locument Metadata		-	
Attachment	File  URL		
	CTA.pdf	Browse	
Category	Country	-	
Country		*	
Document Type	03 Regulatory\Trial Approval\Regulatory Submission\RegSubmission	×	
Submitted Name*	RegSubmission_3Mar2020		
Comments O			
Generated Name			
Submission Date *	DO-MANA YYYY	field is required	
Tags			
Material Type			

**Click Finish** 

## For multiple document upload

File Name	Size.	Upload Status	🕑 Documents Metadata	
Data Privacy Agreement_Czech.pdf	267.1 KB	not uploaded	Category	
DataPrivacyAgreement.pdf	282.4 KB	notuploaded	Country	•
CTApdf	T.0 MB	not uploaded	Country	
			Document Type	•
			03 Regulatory/Trial Approval/Regulatory Submission/RegSubmission	•
			Comments O	
			Document Version	
Upload Progress M	etadata Progress	3 files. 1.6 MB		

## Click Import and Apply Metadata





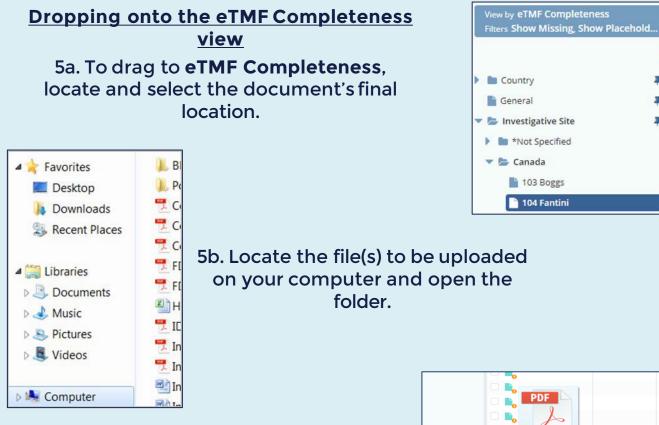
## How to Drag and Drop **Documents When Uploading** TI v 10.3

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5c. Drag and drop the file to the correct missing required document or placeholder.



Only one file can be added per placeholder/missing document.

ttach Document	×
Document Metadata	-
Attachment	File URL
	CTA.pdf Browse
Category	Investigative Site +
Investigative Site	184 Fantini
Contact *	Stephen Fantini 👻
Document Type *	05 Site Management\Site Set-up\Clinical Trial Agreement\CTA
Submitted Name *	СТА
Comments O	
Generated Name	
Tags	
Signature Date *	DO MIMIA VYYY
	This field is required

5d. Complete any required fields based on the selected document type and click Finish when done.



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