

APPLICABLE TO:

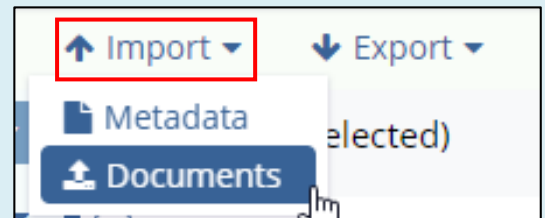
- Administrators
- Room Managers
- Editors
- Readers
- Collaborate
- eISF

1. Navigate to the Documents Library.

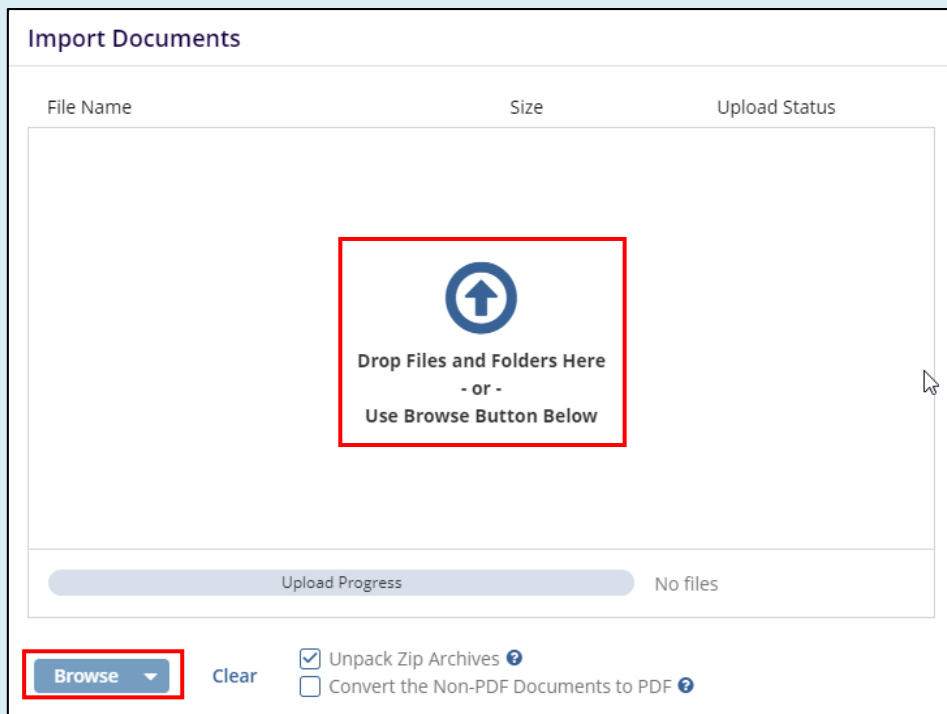


Upload method 1

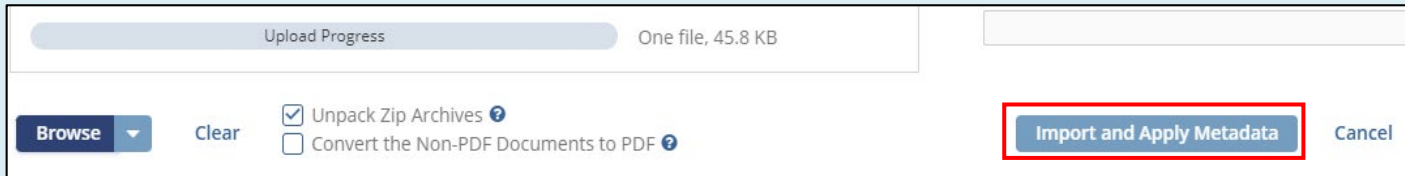
2. Click **Import** in the actions bar above the grid, and select **Documents**



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



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



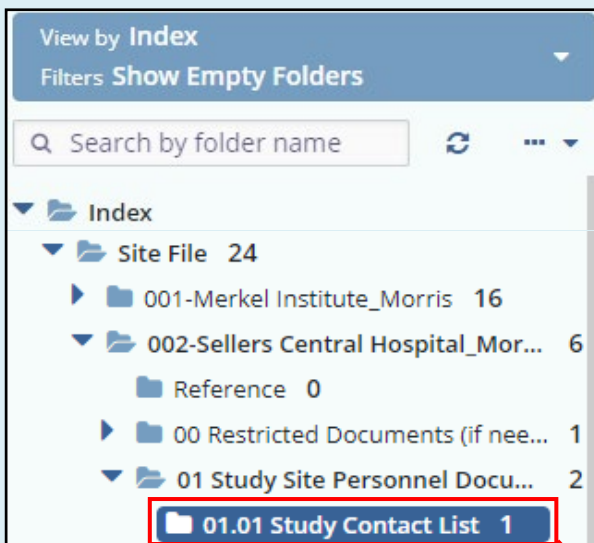
Upload Progress: One file, 45.8 KB

Unpack Zip Archives ?
 Convert the Non-PDF Documents to PDF ?

 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.

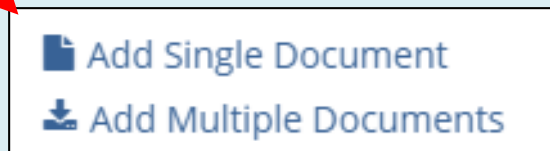
Upload method 2

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..

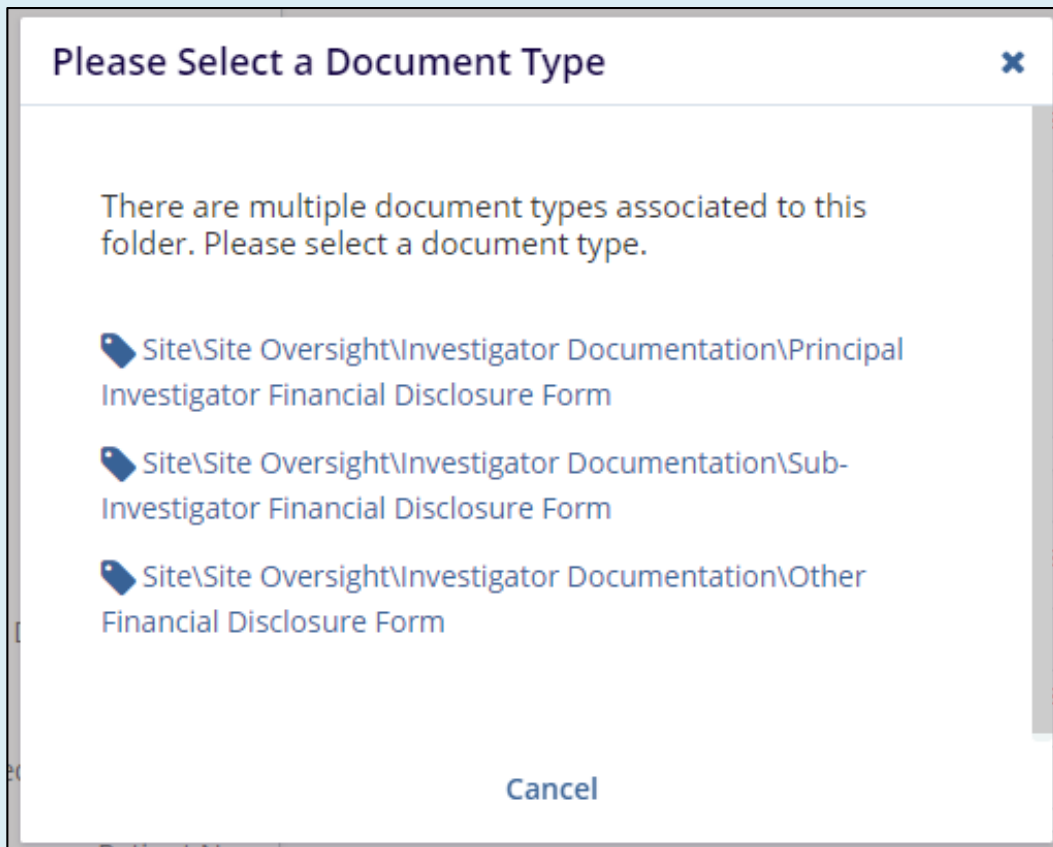


6. First, make sure you are using an **Index View**. Select a specific **folder**, then right-click on the folder name

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

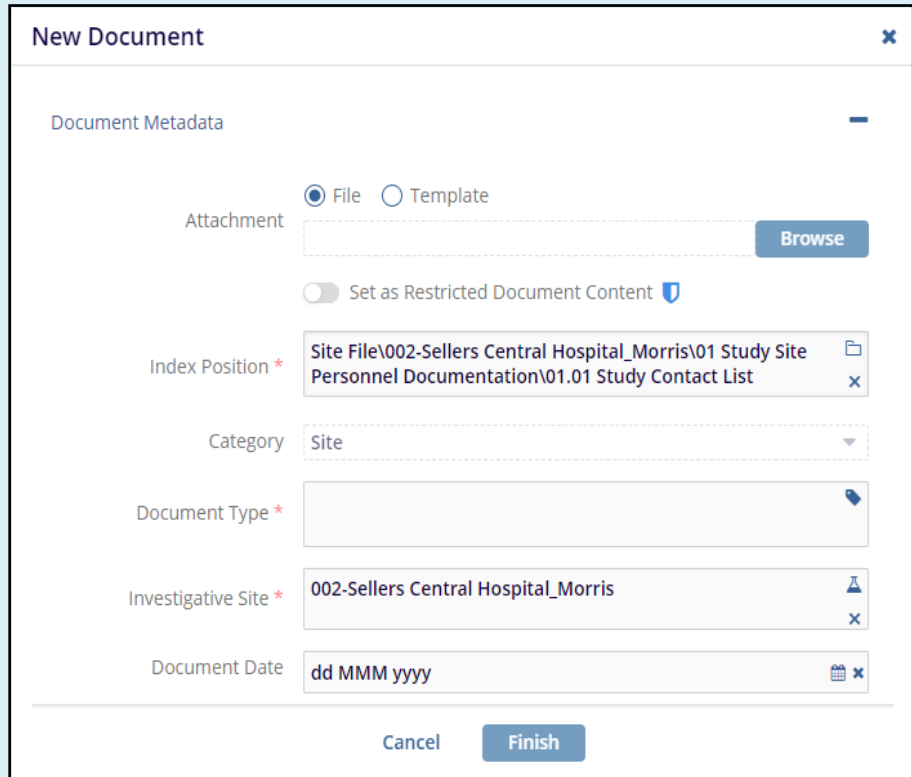


8a. Selecting **Add Single Document** will open the New Document dialog. If the folder you are uploading to supports multiple doc types, you will be prompted to select the appropriate one from a list



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

Category Site ▼

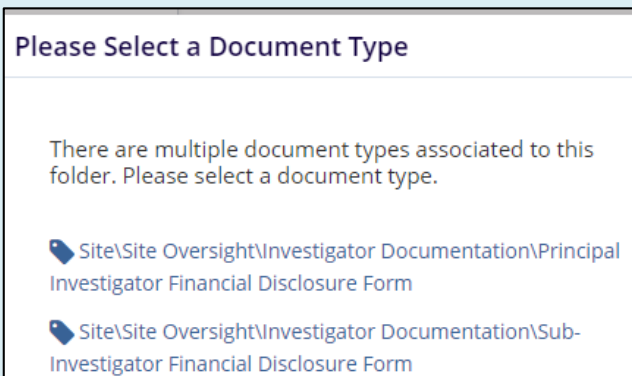
Document Type * 📁

Investigative Site * 📍 x
002-Sellers Central Hospital_Morris

Document Date 📅 x
dd MMM yyyy



Cancel Finish

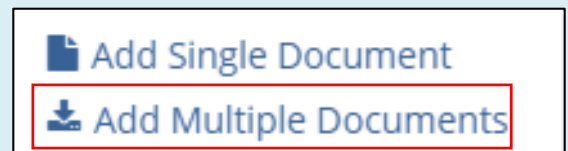
9. If you choose to **Add Multiple Documents**, select doc type if appropriate, then follow steps 3) and 4) of this guide after clicking





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