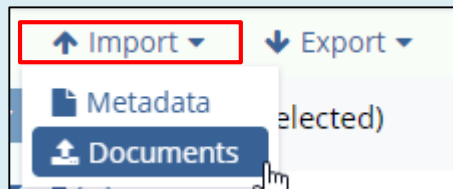


APPLICABLE TO:

- Administrators
- Room Managers
- Editors
- Readers
- eTMF
- Study Start-Up
- myTI




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



2. Method 1.
Click **Import** above the grid and select **Documents**.

Import Documents

File Name	Size	Upload Status
 Drop Files and Folders Here - or - Use Browse Button Below		

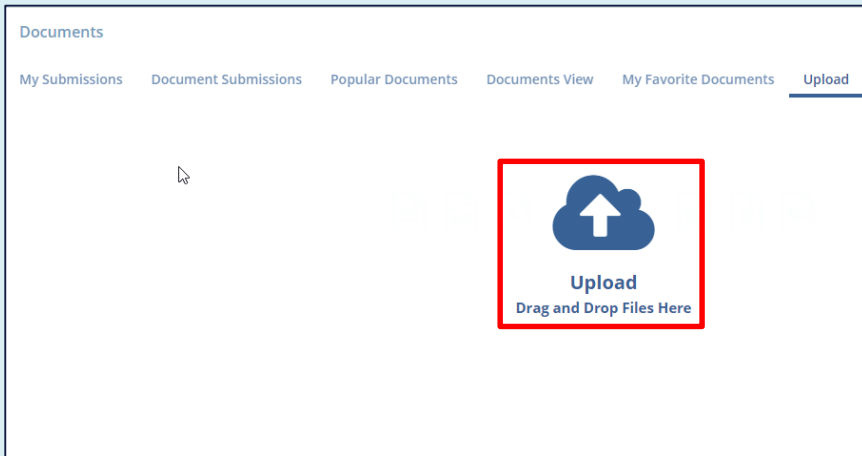
Upload Progress No files

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

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



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.

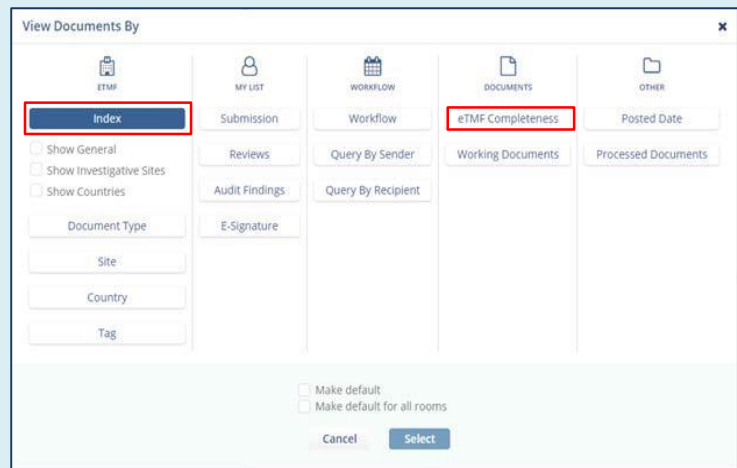


*Documents can also be dragged for uploading via the **Upload** dashlet on the Dashboard

- Method 2.**

Use the view filter to change the view if necessary.

Documents can be dragged for uploading to either the **Index** or **eTMF Completeness** view.



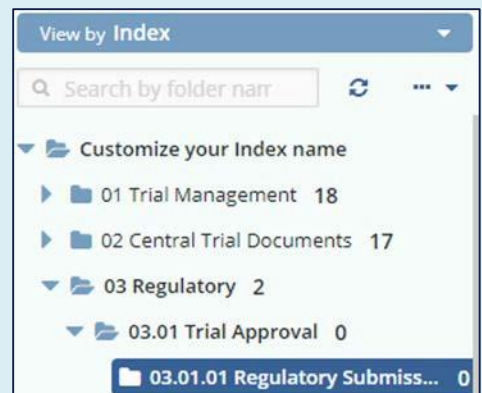
Dragging a document into the eTMF, does not bypass any room QC Workflow requirements.

Dropping into the Index View

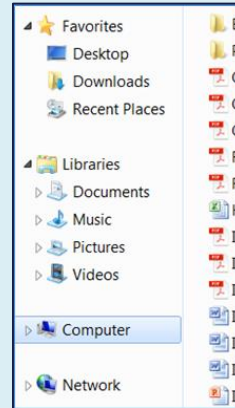
- Drill down to the desired folder.



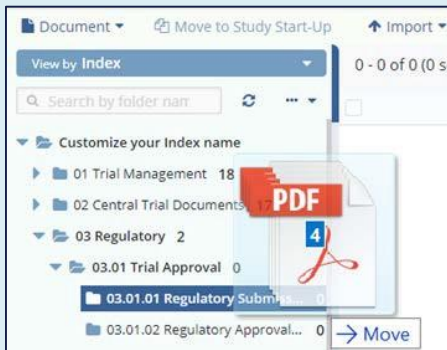
Documents dropped to the Index will appear in their destination folder or the Staging folder depending upon room settings. They will not be published as final until approved in the Workflow.



6a. Locate the file(s) to be uploaded on your computer.



6b. Drag and drop the file(s) to the destination index folder.

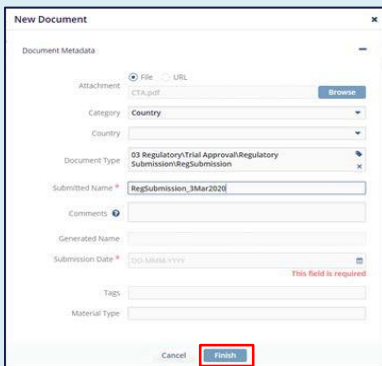


TI will offer to code documents based on document types normally coded to the selected folder. Choose a document type, or press Cancel to skip this step.

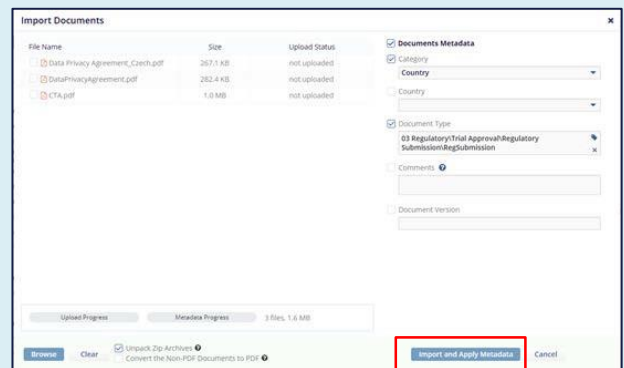
6c. Complete any required fields based on the chosen document type.

For single document upload

For multiple document upload



Click **Finish**



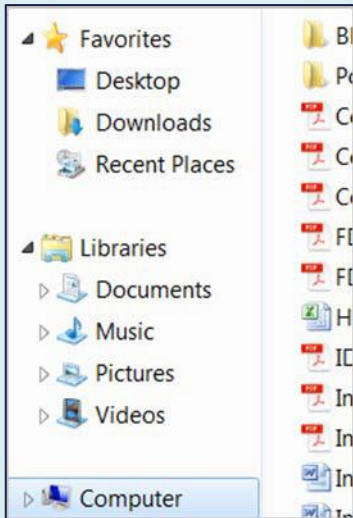
Click **Import and Apply Metadata**

Dropping onto the eTMF Completeness view

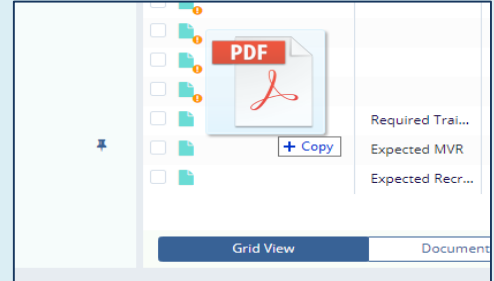
7a. To drag to **eTMF Completeness**, locate and select the document's final location.



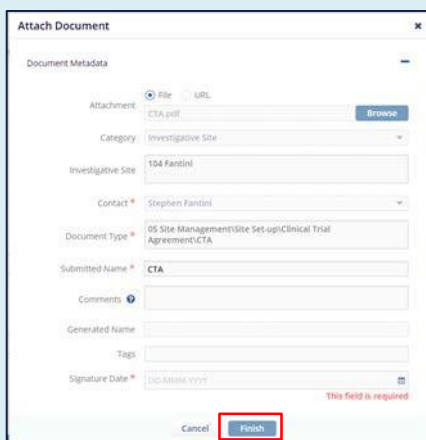
7b. Locate the file(s) to be uploaded on your computer and open the folder.



7c. Drag and drop the file to the correct missing required document or placeholder.



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



Attach Document

Document Metadata

Attachment: CTA.pdf (Browse)

Category: Investigative Site

Investigative Site: 104 Fantini

Contact: Stephen Fantini

Document Type: OS Site Management/Site Set-up/Clinical Trial Agreement/CTA

Submitted Name: CTA

Comments

Generated Name

Tags

Signature Date: DD-MM-YYYY (This field is required)

Cancel | **Finish**

7d. Complete any required fields based on the selected document type and click **Finish** when done.