

How to Upload Documents in Collaborate

TI version 10.8

APPLICABLE TO:

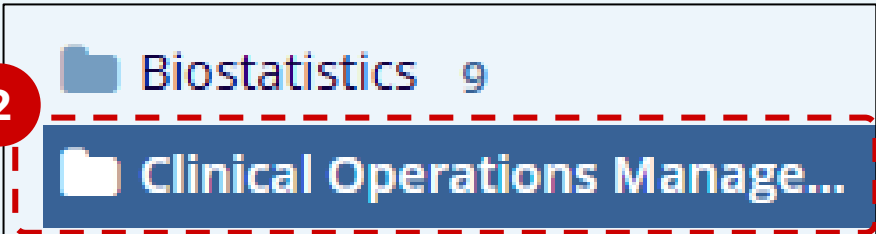
- ☒ Admin
- ☒ Manager
- ☒ Editor
- ☐ Reader
- ☒ Collaborate
- ☒ eISF

Upload method 1

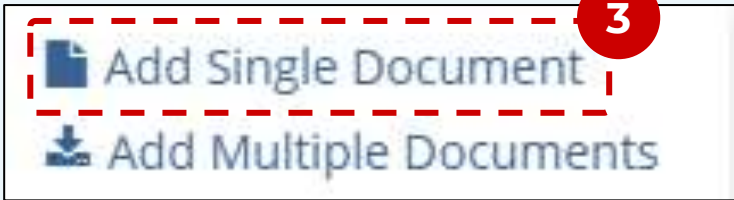
1 Navigate to the **Documents Library**.



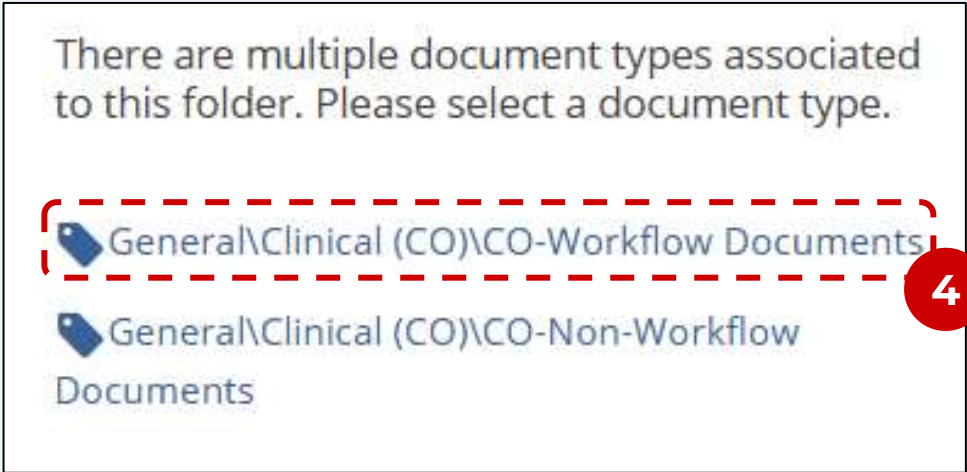
2 Select the appropriate folder.
Drag&Drop your document into the grid, or **right-click** the folder name.



3 Choose the **Add Single Document** option.



4 You may be prompted to select a document type. Just **click** on the option relevant to the document.



How to Upload Documents in Collaborate

TI version 10.8

5 **Browse** for a file to upload and complete the required and optional metadata fields. These vary based on room type/configuration.

Document Metadata

Attachment * ☒ File ☐ Template **6** Browse

Index Position * ✕

Category

Document Type * ✕

Type of Document (ClinOps)

Document Description

Comments

6 (not applicable to eISF) For certain controlled document types, you may have additional options regarding effectiveness and readiness to start the workflow.

Effective Period ? ▲▼

☐ Effective Immediately

Next Review Period ▲▼

☐ Periodic Review not Required

Change Control Management *

Is document ready for Approval Workflow? *

☐ Yes ☐ No

7 Click **Finish** to upload the document.

7 Cancel Finish

How to Upload Documents in Collaborate

Upload method 2

Best for multiple documents.

- 8
- Select the appropriate folder.
Drag&Drop your documents into the grid.



- 9
- The multi-document import window looks different but the process is similar. There are no requirements for specific metadata to be filled. Options to unpack compressed folders and convert to PDF are present. Click Import **All & Apply Metadata** to finalize.

Import Documents

Fill metadata or Assign Placeholders

Select Documents to Import them with/without Metadata or with assigned placeholders. Your progress with deselected attachments will remain.

Remove

Browse File

Browse Folders

3 Documents 0 selected

☐	Document	Size	Import Status	Placeholder
☐	Example_Bud...	15.4 KB	NOT IMPORTED	
☐	List of produc...	10.0 KB	NOT IMPORTED	
☐	IRB Approval ...	32.5 KB	NOT IMPORTED	

Fill Metadata

Assign Placeholders

Metadata

Clear All

Index Position

Controlled Documents\Document Change Requests

Category

Corporate & Departmental

Document Type

Procedural Documents\DCR

IRB/EC

Document Owner

Lorenzo Vanzetto

Starting Version

0.1

Controlled Document Type

Unpack Zip Archives

Convert Non-PDF files to PDF

Cancel

Import All & Apply Metadata