

# How to Upload Documents in Collaborate

TI version 10.8

## APPLICABLE TO:

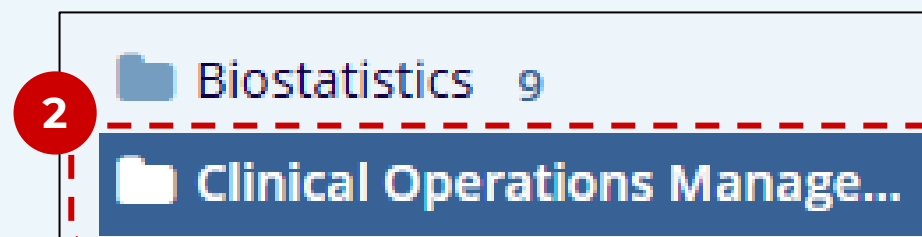
- Admin
- Manager
- Editor
- Reader
- Collaborate
- eISF

## Upload method 1

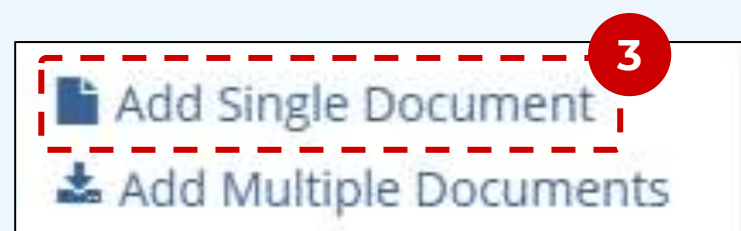
**1** Navigate to the **Documents Library**.



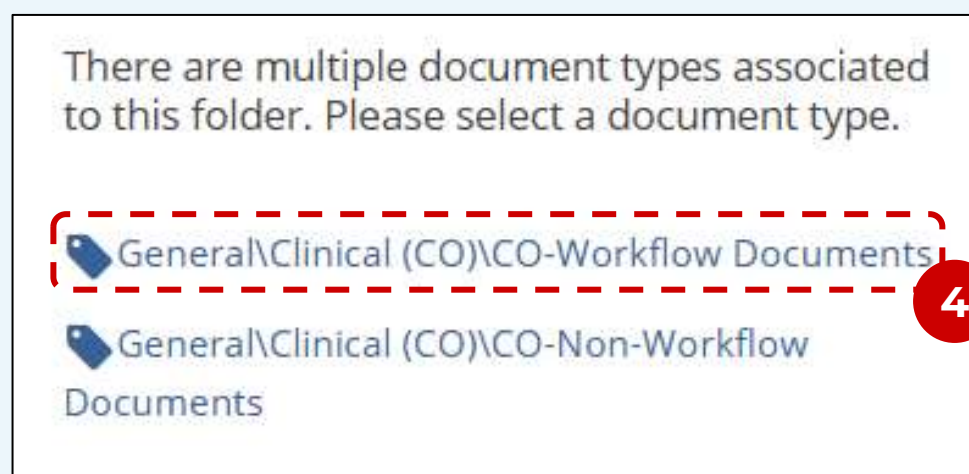
**2** Select the appropriate folder. Drag&Drop your document into the grid, or **right-click** the folder name.



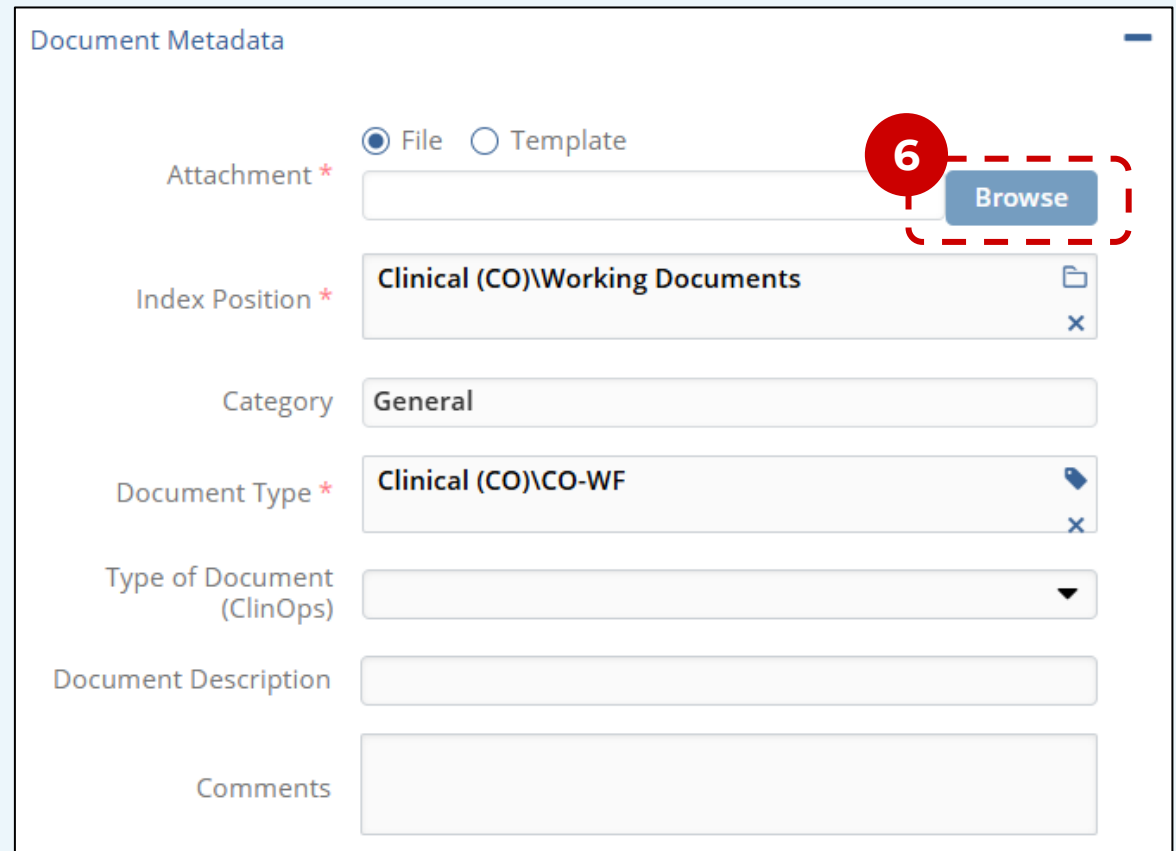
**3** Choose the **Add Single Document** option.



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

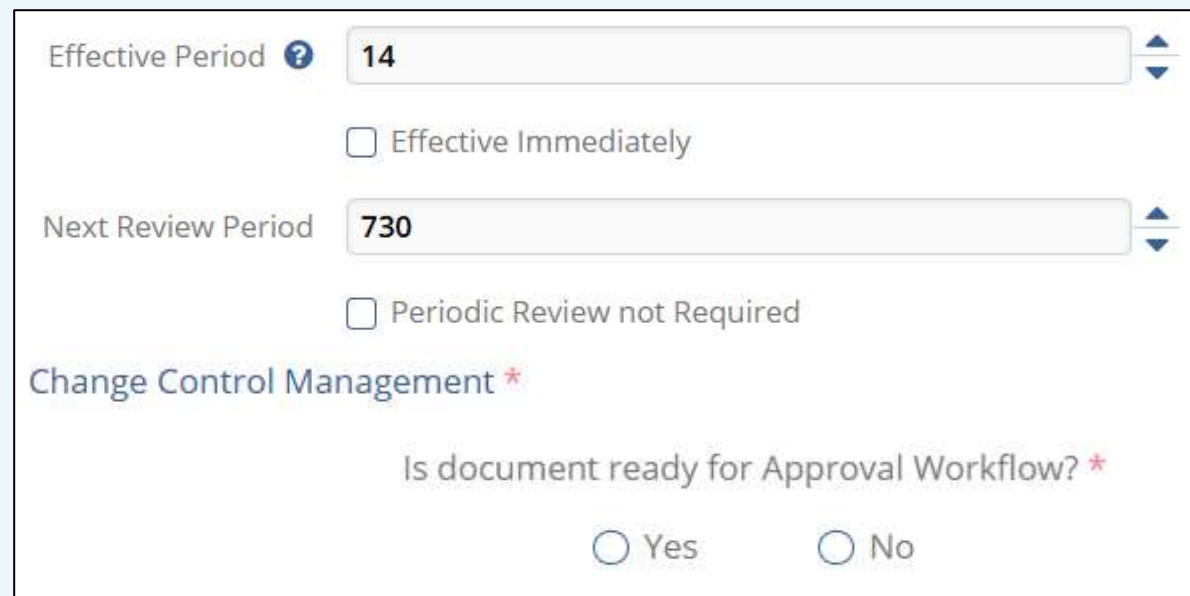


**5** **Browse** for a file to upload and complete the required and optional metadata fields. These vary based on room type/configuration.



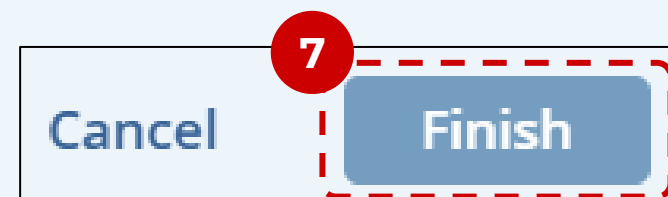
The screenshot shows the 'Document Metadata' form. At the top, there are radio buttons for 'File' (selected) and 'Template'. Below this is an 'Attachment' field with a 'Browse' button highlighted by a red dashed box and a red circle with the number 6. Other fields include 'Index Position' (set to 'Clinical (CO)\Working Documents'), 'Category' (set to 'General'), 'Document Type' (set to 'Clinical (CO)\CO-WF'), 'Type of Document (ClinOps)', 'Document Description', and 'Comments'.

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



The screenshot shows a form with 'Effective Period' set to 14 and 'Next Review Period' set to 730. There are checkboxes for 'Effective Immediately' and 'Periodic Review not Required'. Below this is the 'Change Control Management' section with the question 'Is document ready for Approval Workflow?' and radio buttons for 'Yes' and 'No'.

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

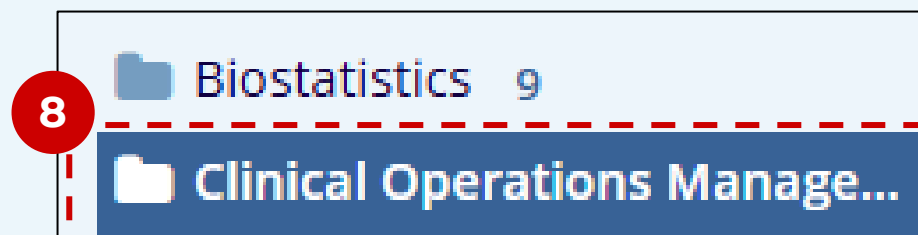


The screenshot shows two buttons: 'Cancel' and 'Finish'. The 'Finish' button is highlighted with a red dashed box and a red circle with the number 7.

## 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.

