

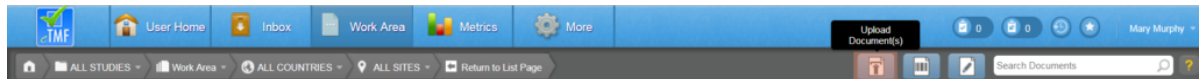
# Upload Program & Enterprise Study Item

Use the steps described on this page to [Upload](#) a [Program Level Document](#) or an [Enterprise Level Document](#) so that it can be finalized and associated with studies. See [Program and Enterprise Documents](#) for an overview of how these types of documents work in the eTMF.

Each [Enterprise Level Document](#) and [Program Level Document](#) must first be uploaded independent of a study and finalized before it can be associated with specific study items.

**NOTE:** Not all users can upload Program or Enterprise documents. Permissions depend on your eTMF configuration.

1. Upload one or more documents using the **Upload Document(s)** button in your Work Area.



2. On the Upload to Work Area screen, click **Add Files** and select one or more files from your local network. Do **NOT** assign a study, country or site value on the Upload to Work Area screen.
3. Click **Upload**. The files are uploaded to your Work Area.
4. Select the hyperlink for one of the uploaded files in your Work Area to open the Details view.
5. Click **Edit** in the Index area of the Workspace panel. The Match to Study Item screen appears.
6. Click the [Program/Enterprise Document Types](#) link at the bottom of the screen.

**Match to Study Item**

**You must select a study before being able to find/choose a Study Item**

Find Item

Country

Site

Show Fulfilled

View Document Content

No Study Selected  
Select Study

Study Item Status	Country	Site	Study Item Name
Study Items			

No items to display

If study item is not found view [TMF Master List](#) To match a program/enterprise-level document view [Program/Enterprise Document Types](#)

Cancel Save

7. Use the Search field and/or Level, Organization, or Category fields to locate the correct document type. Select the document type from the list and click **Save**.
8. On the New Program/Enterprise Document screen, complete any required fields (i.e., those outlined in red).
9. Click **Save** to return to the Match Program/Enterprise Document screen. The program/enterprise level study item is listed at the top.

**Match Program/Enterprise Document**

Find Item

Level

Organization

Category

View Document Content

Study Item Status	Country	Site	Study Item Name
Program			Investigator Brochure

Document Types

	<b>Expedited Safety Report (Study Level)</b> Ref Model ID: 07.02.01 Document Type ID: 107.03 Level: Program	Organization: Safety Category: Safety Reporting
	<b>Investigator Brochure</b> Ref Model ID: 02.01.01 Document Type ID: 101.01 Level: Program	Organization: CPM Category: Central Trial Documents
	<b>IRT User Acceptance Testing (UAT) Certification</b> Ref Model ID: 06.06.03 Document Type ID: 106.43 Level: Enterprise	Organization: ClinOps Category: IP and Trial Supplies
	<b>IRT User Manual</b> Ref Model ID: 06.06.04 Document Type ID: 106.44 Level: Enterprise	Organization: ClinOps Category: IP and Trial Supplies

1 - 8 of 8 items

Go back to [Study Items](#) If study item is not found view [TMF Master List](#)

Cancel Save

10. Click **Save** on the Match Program/Enterprise Document screen. You are returned to the Details view for the study item.
11. Proceed as normal with indexing and submit to QC. Once the document has been finalized, it can be associated with study items in individual studies.