

# eUpload Overview

eUpload is a tool that can be used in conjunction with eTMF for expedited upload and processing of ad hoc documents. eUpload provides the following, primary features:

- Ability to upload files individually or in batches
- Automatic indexing of uploaded documents to ad hoc document types
- Thread matching and metadata extraction from Outlook .msg files
- Ability to review uploaded files and specify missing metadata
- One-click submission with configurable submission routes (e.g., Work Area or Indexing task for additional indexing, QC or finalization for documents with complete metadata)

eUpload allows you to upload files from your local machine to a selected study (country and site are optional) and TMF Reference Model folder. Based on these selections, the system automatically indexes each document uploaded to the appropriate document type and level and creates the associated study item(s). If an ad hoc study item already exists for the selected study/country/site level and TMF Reference Model folder, you can upload a document directly to that study item as a newer version. Uploaded documents are immediately available for review both in eUpload and in the user's eTMF Work Area.

During the upload, special

handling is provided for Outlook .msg files, automating several steps of the process and adding to your overall time savings. Key metadata such as Subject (if applicable), Document Date, Receipt Date, and Language are automatically extracted from the file and used to populate the corresponding fields on the document. In addition, thread identification is used to match the uploaded content to existing email threads in the study, eliminating unnecessary duplication.

eUpload provides a simplified review screen that allows you to ensure that the appropriate documents were uploaded and to fill in missing metadata before submitting them. Documents can be reviewed and submitted on an individual basis, or you can skip the review altogether and submit all documents at once.

The act of submitting a document removes the document from eUpload and may also update its lifecycle state in eTMF, based on the completeness of the document's metadata and on system configuration settings. For example, eUpload can be configured to send documents requiring further indexing to an Indexing task upon submission instead of keeping them in the user's Work Area, based on your organization's practices. Configuration settings also determine whether documents that are completely indexed at the time of submission are sent to QC or finalized.