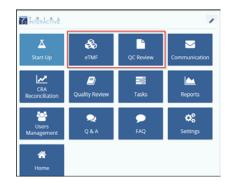


## Workflow: How to QC a <u>Document</u>

<u>Applicable to:</u> ✓ Administrators ✓ Editors ☐ Readers ✓ eTMF ☐ Study Start-up



 Login to the room to perform the Quality Check
 (QC) of a document. Navigate to the eTMF module or the QC Review module.

<u>Note</u>: users must *first* be added to the Workflow group(s) by the room Administrator

Navigate to the Documents module in the eTMF.

Select **Reviews** from the filter views.

\*The QC Review module defaults to this.

Document 🕶 ■ Manage Security 4 Move to Study Start-0 - 0 of 0 (0 selected **6** View Documents By ප ETME MY LIST Д Index Submission 2 Document Type Reviews Site Audit Findings Country E-Signature Oue Ouer

3. Click on Available for Review.



Move to Study Start-Up

1 - 50 of 303 (1 selected)

Index

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Release

↑ Import

↑ Release

↑ Import

1 - 50 of 303 (1 selected)

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4. Select the document(s) to be reviewed. Click **Claim** above the grid.

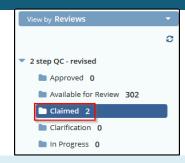


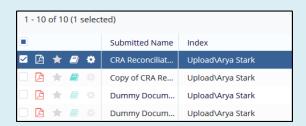
Click **Yes** 



## Workflow: How to QC a Document

5. Click on **Claimed** to view all your documents waiting for review.





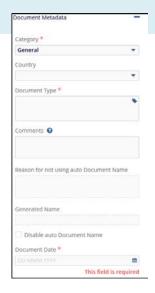
6. Select the claimed document you want to review.



7. Confirm the document is clean and complete.

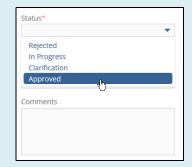
Enter, review, or update all required

Metadata Fields



8. In the Metadata pane, scroll down to select the applicable document **Status** 

Below the pane, click Save



See related guide How to create a Workflow Query



For any additional assistance, click ...

