TRIAL INTERACTIVE

Workflow: How to Create a Query TI v 10.4

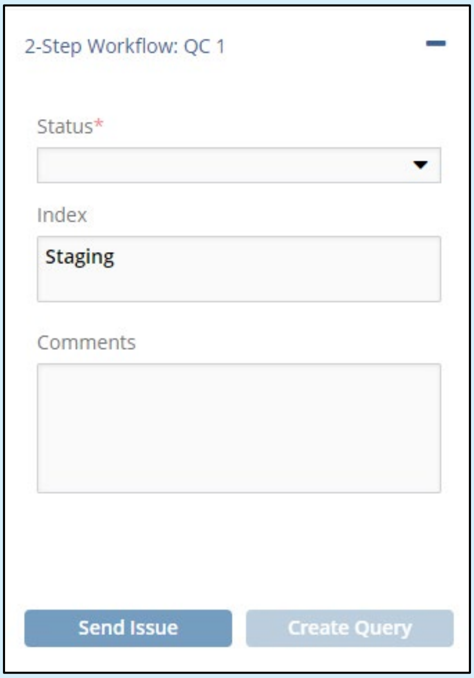
APPLICABLE TO:

- ● Administrators
- ● Room Managers
- ● Editors
- ○ Readers

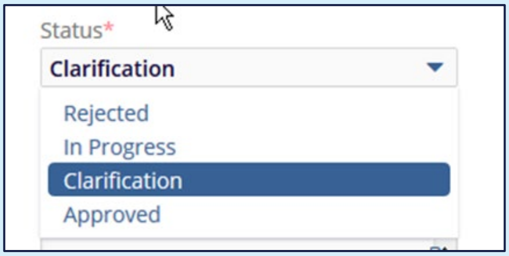
- ● eTMF
- ○ Study Start-Up
- ○ myTI

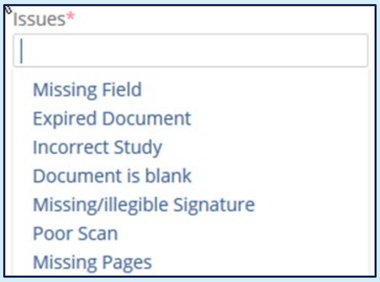
Note: The following steps assume the user is familiar with the QC Workflow and has been added to a Workflow group; see the related job aid: **How to QC a Document**.

1. After performing Quality Check (QC) of a document where a need for clarification is determined, scroll down within the Metadata pane on the right to find **Status**.



2. Under **Status**, select **Clarification.**

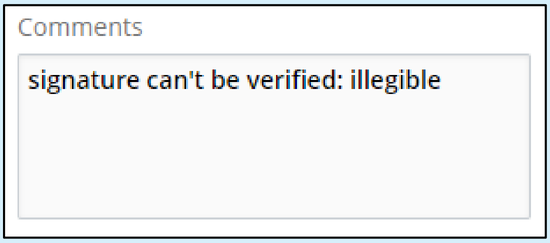




3. An **Issues** field appears as a required field. Select all that are applicable.

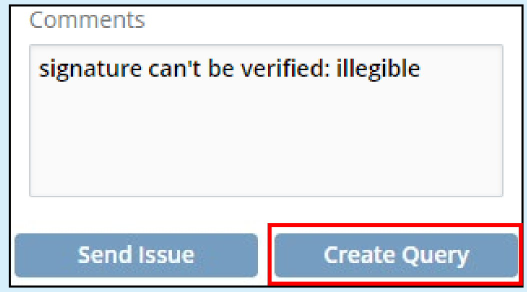
4. Enter any relevant **Comments.**

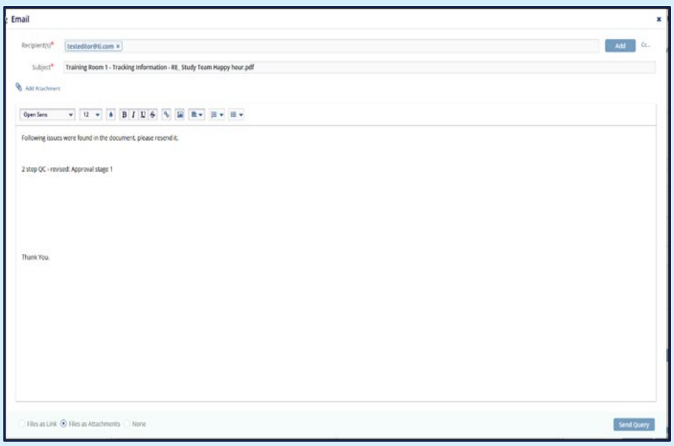
⚠ these are Reviewer comments which are workflow-specific and separate from the general Comments metadata field.



Workflow: How to Create a Query
TI v 10.4

5. Initiate a Query by clicking on the **Create Query** button.



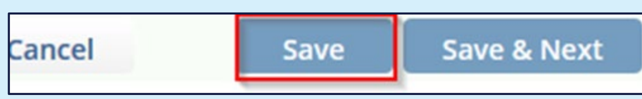


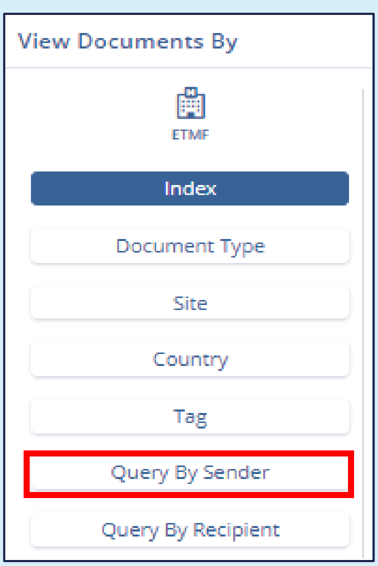
6. The Query email dialog auto-populates. Click **Add** or **CC** to edit Responders (i.e. recipients).

- Do **not** change the **Subject**
- Update the email body as necessary

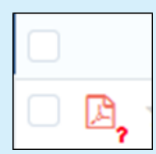
7. Click **Send Query**. An email is issued to all responders.

8. In the Metadata pane, click **Save** to update the document review status.





The document icon in the grid updates with a “**?**” for any document that has an open query.



8. You can review **Queries** by changing the document view to **Query by Sender.**

Also refer to related job aids **Workflow:How to Resolve a Document Query** and **How to Reply to a Query**.