APPLICABLE TO:

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

- ● eTMF
- ○ Study Start-Up
- ○ myTI

<u>Dashlets</u> that aid in monitoring Workflow progress:

Under the **eTMF** grouping of dashlets:

- • **Claimed & Unclaimed**
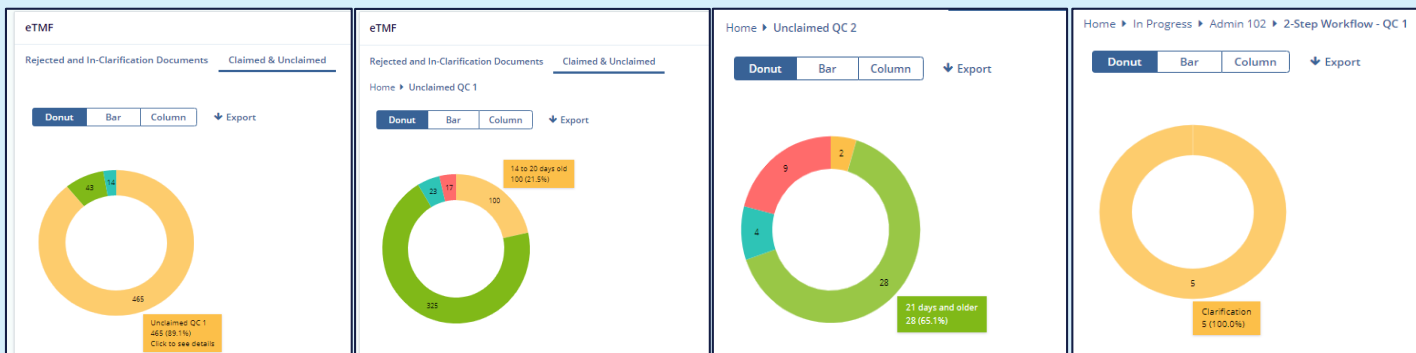- • **Rejected and In-Clarification Documents**

Under the **Documents** grouping of dashlets:

- • **My Submissions**

The **Claimed & Unclaimed Documents** dashlet provides a count of all documents that are in a workflow and are either **claimed, unclaimed**, or **in progress**.

Users can further click on each slice of the interactive donut chart to obtain further detailed information.
Refer to screenshots below:

The **Documents Rejection and Clarification** dashlet displays the reason for rejections and also provides a count of each defined rejection type.

This dashlet can be used to determine the most common reason for *rejections* and *clarifications requested*.

Users can further double-click on the count to view the list of documents associated with a particular rejection or clarification reason.
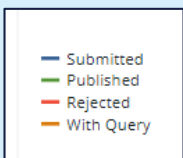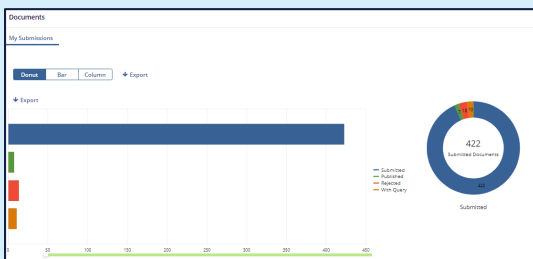
Refer to the screenshots below:

The **My Submissions** dashlet will allow users to view the files they have uploaded right from their dashboard.
The files are categorized by **Submitted, Published, Rejected, With Query**

Users can further click on each slice of the interactive donut chart to see the list of documents that fall into each category.
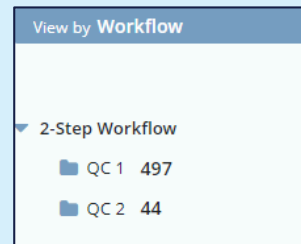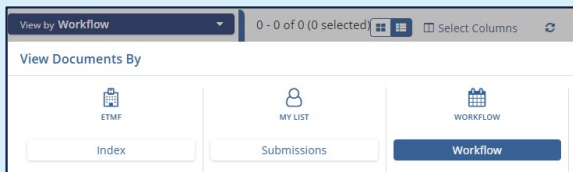
Refer to screenshots below:

Views that aid in monitoring Workflow progress within the **Documents Module**:

- View Documents by **Workflow**
- View Documents by **Reviews**

By **Workflow:**
From this view, you access the documents available to the user for review in the various stages of workflow.
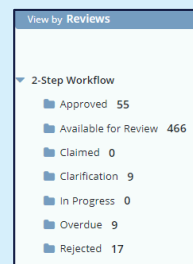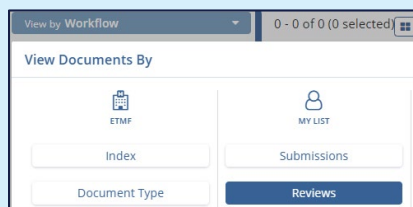
Refer to the screenshots below:

By **Reviews:**

Depending upon workflow settings, documents added to the room are automatically added to the workflow.
Users can view the documents added to the workflow from the **Reviews** view in the **folder with unclaimed documents (Available for Review)** under the workflow

Refer to the screenshots below:

Note: If you are the part of the reviewers group assigned to a workflow, the My Reviews dashlet in the eTMF Documents module is automatically activated for you. You can access the same information as in My Reviews from the Quality Review module as well.