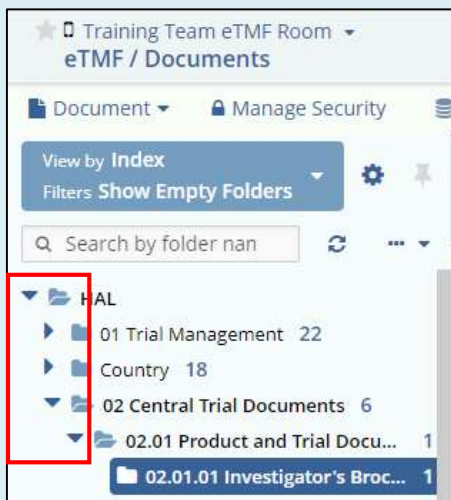
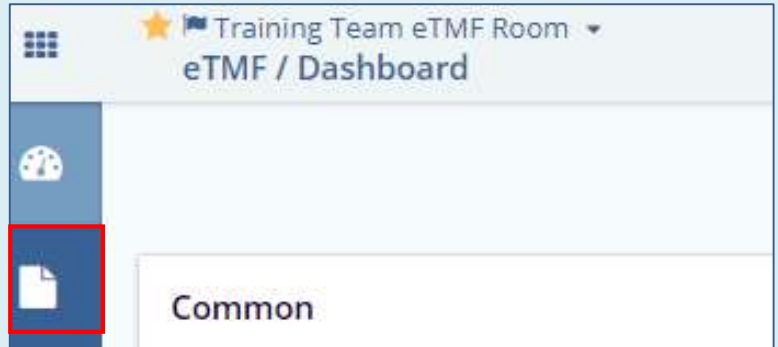


APPLICABLE TO:

- Administrators
- eTMF
- Room Managers
- Study Start-Up
- Editors
- myTI
- Readers

1. Log into a room and navigate to the Documents Module.



2. In the Index Pane, drill down through the folders in order to select one containing the desired document or placeholder.

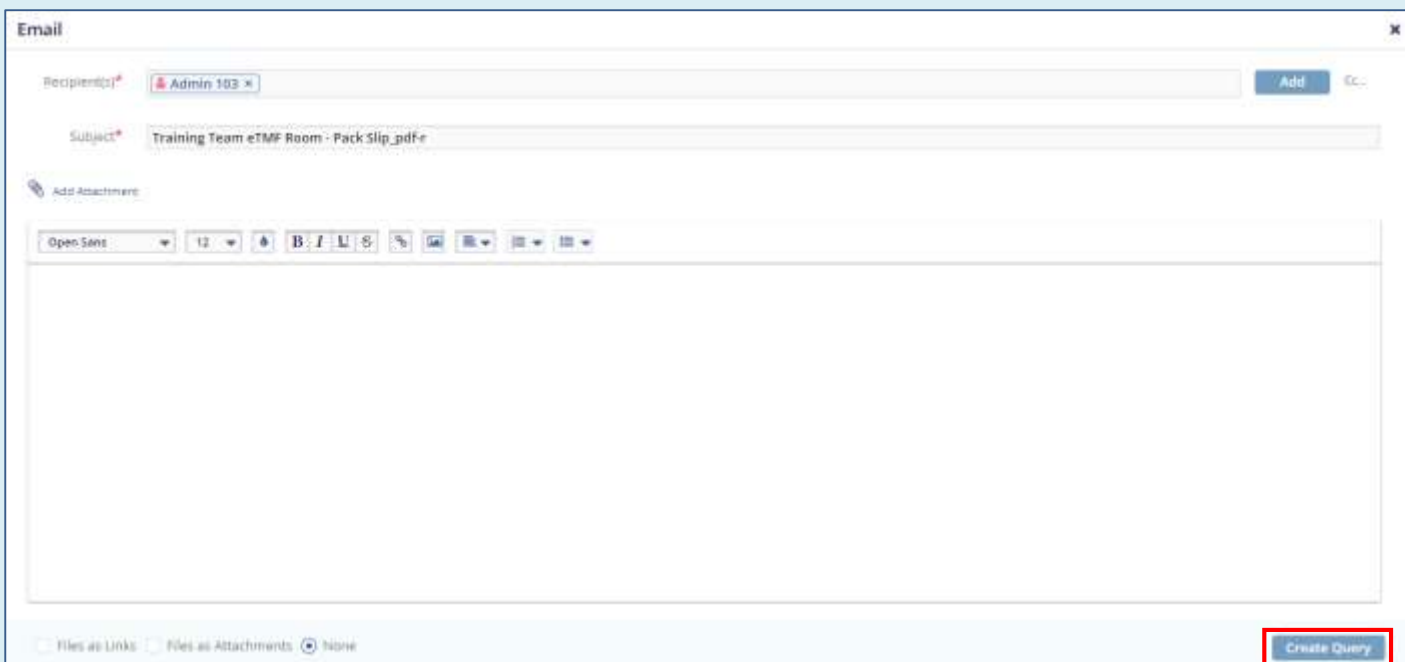
3. Select the document or placeholder, then click on the **More** button (3 dots) at the top-right corner of the metadata pane and select "Create General Query".



4. Treat the query creation box as a standard email.


Add or remove intended recipients (one will be selected by default), optionally change the subject line, then type your query in the text box below.

Use the radio buttons at the bottom to select how the query responder should receive a copy of the queried document –as attachment, link, or not at all-, and then click **Create Query** to send your message.



The screenshot shows an 'Email' window with the following elements:

- Recipient(s):** Admin 103 (with an 'Add' button and 'E...' text)
- Subject:** Training Team eTMF Room - Pack Slip.pdf
- Add Attachment:** (with a paperclip icon)
- Rich Text Editor:** Includes a toolbar with options like 'Open Sent', font size (12), bold (B), italic (I), underline (U), strikethrough (ABC), link (chain), unlink, and list (bulleted and numbered).
- Bottom:** Radio buttons for 'Files as Links', 'Files as Attachments', and 'None' (selected). A 'Create Query' button is highlighted with a red box.

 General queries can also be created for documents displayed in dashlets, and in the CRA Reconciliation and Queries modules.

Please see the related job aids “How to Create a Workflow Query” and “How to Create an Audit Query” for additional information on creating a query in Trial Interactive.