How to Review Communications

TI version 10.6

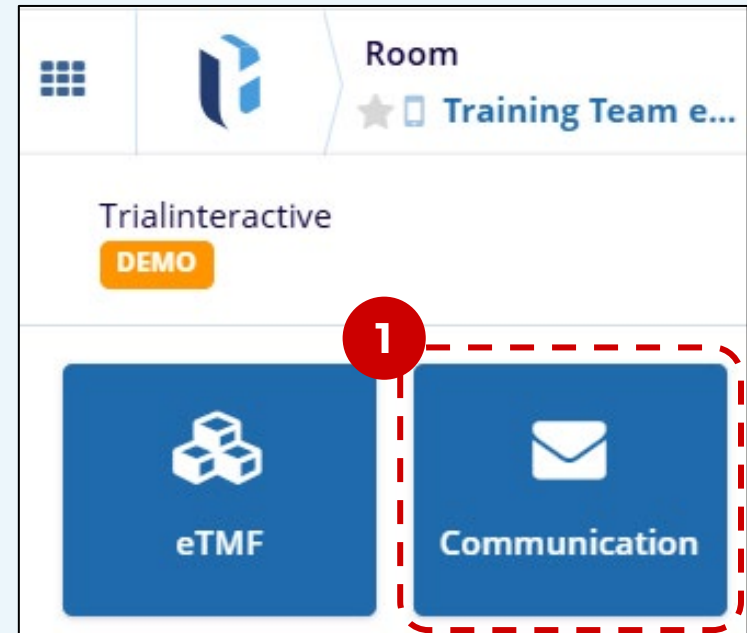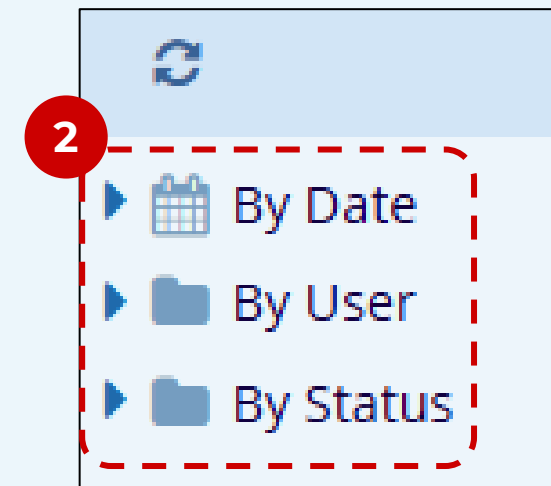**TRIAL INTERACTIVE**

APPLICABLE TO:

- ● Admin
- ● Manager
- ● Editor
- ○ Reader

- ● eTMF
- ○ Collaborate

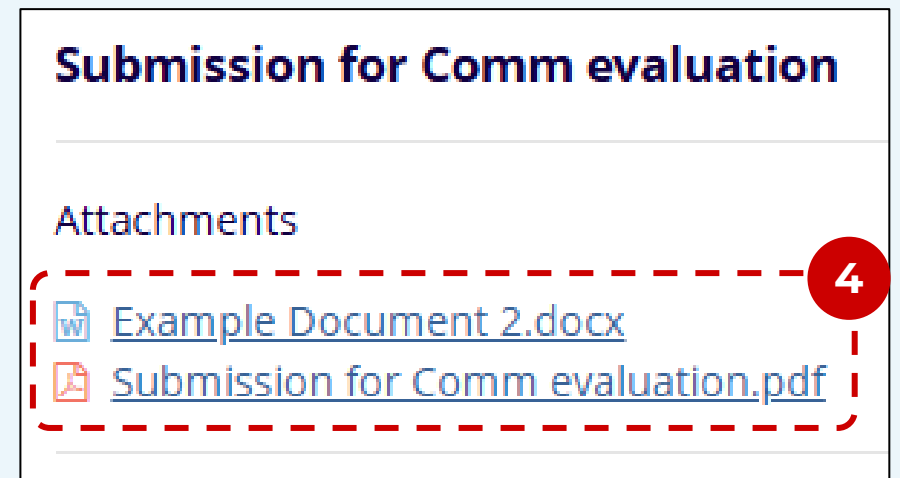**1** Enter a room and access the **Communication** area.

2 Select your preferred **display mode:** By Date, By User (submitter), or By Status.

3 **Select** a received communication that is marked as <u>Pending</u>.

		Sent Date	Title	Sender N...	Sender A...	Status
☐						
☐	⸎2 •••	31 Oct 202...	Submissio...	lvanzetto...	lvanzetto...	Pending

1 - 1 of 1 (0 selected)

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4 In the side panel (to the right) access the attachments to review the submission. The number of attachments varies.

Submission for Comm evaluation
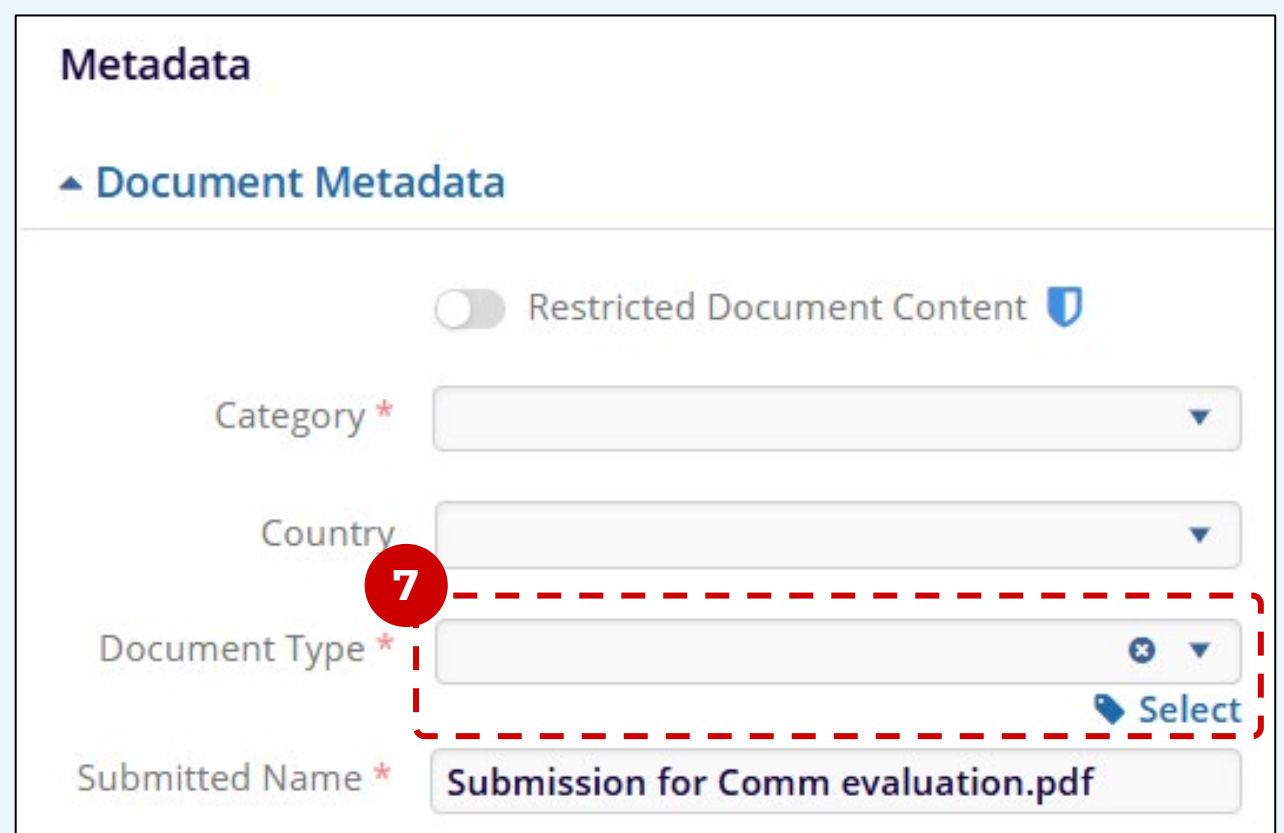
Attachments

📄 Example Document 2.docx
📄 Submission for Comm evaluation.pdf

4

5 Once your have reviewed the content, decide if it is **Relevant** or **Non-Relevant**.

5

🔲 Relevant   🔲 Non-Relevant

📝 <u>Non-relevant</u> submissions will remain inactive but not deleted.

6 By choosing **Relevant**, you are indicating that the system should generate one or more new documents for the study room using the submission file(s). A document creation window appears, where metadata must be added.

7 We'd recommend starting the metadata configuration process with the **Document Type** field.

Metadata

▲ Document Metadata

⚪ Restricted Document Content 🛡️

Category *   ▼

Country   ▼

7

Document Type *   ⊗ ▼

🏷️ Select

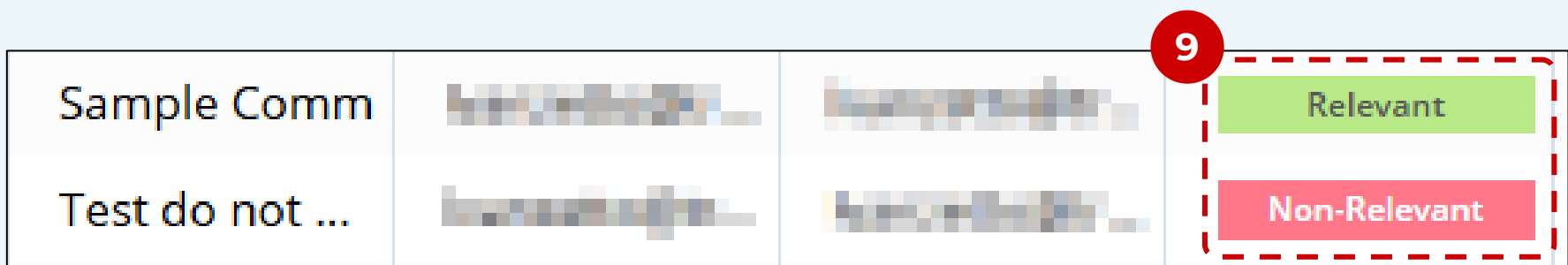Submitted Name *   Submission for Comm evaluation.pdf

TRIAL INTERACTIVE

8 When a submission consists of multiple files, you may find the controls at the bottom of the window helpful. These allow you to **skip** creation of a document you don't deem necessary for the eTMF, as well as **copy the selected Metadata** to the next document.

8

☑ Use the same metadata for the next document ☐ Skip this document

Previous

Finish

9

9 When you have set all the documents, click **Finish**.
This generates documents that will undergo the normal QC process in the eTMF.

10 Relevance status is clearly marked in the submissions list.

9

Sample Comm			Relevant
Test do not ...			Non-Relevant