Workflow: How to Monitor the QC Workflow

TI version 10.6

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APPLICABLE TO:

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

- ● Offering 1
- ○ Offering 2

Some of the best tools to monitor workflow activity are dashlets. We propose a selection of some that you might want to consider, with their default location.

In the *eTMF* group

- Claimed & Unclaimed
- Rejected and In-Clarification Documents
- Open Queries By Age

In the *Documents* group

- By Workflow Status

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1 The **Claimed & Unclaimed** Documents dashlet provides a count of all documents that are in a workflow and are either claimed, unclaimed, or in progress. It also provides insight on the timeliness of processing.

Users can click on each slice of the interactive chart to obtain detailed information about each status.
Refer to screenshots below:
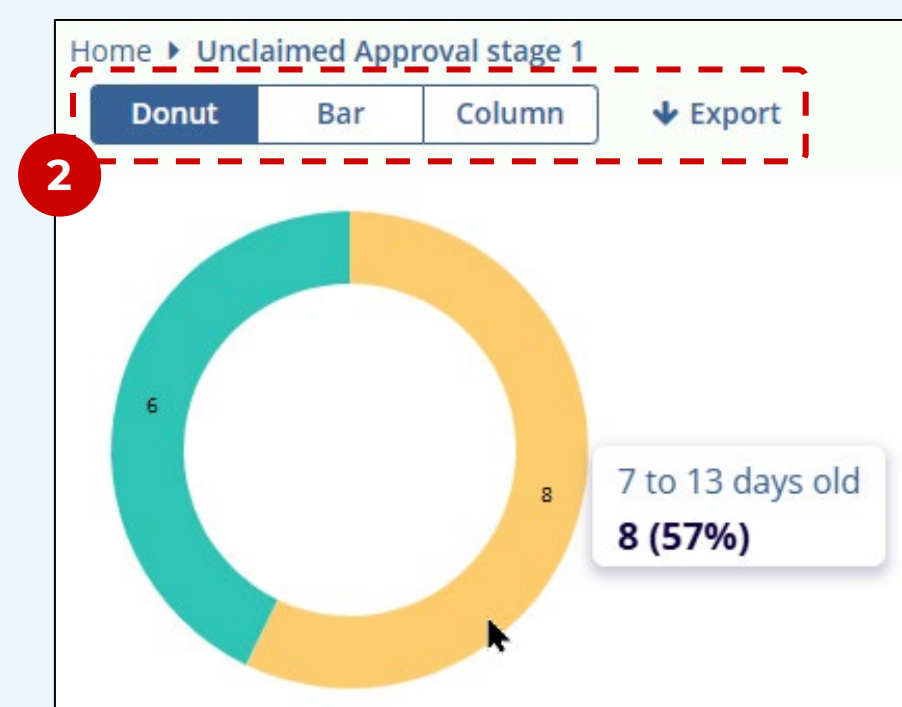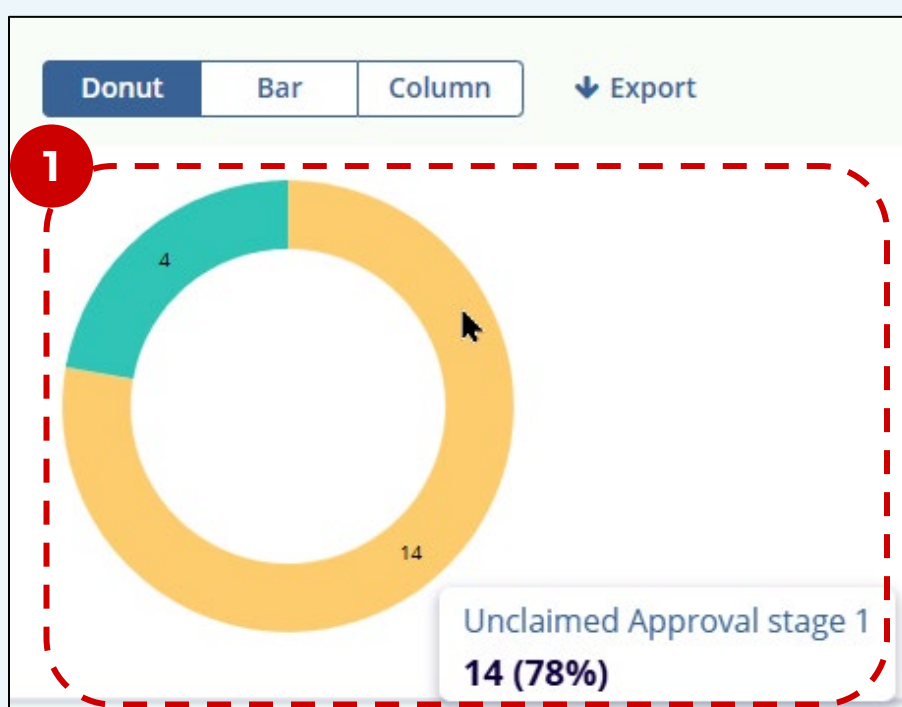
2 Chart and graph dashlets can be visualized as different types of charts, and the charts can be **Export**ed as images to various locations.

3 The **Rejected and In-Clarification Documents** dashlet offers a tally of documents that were rejected or needed clarification within the workflow. The reasons for this are displayed with a counter, and a list of affected documents can be displayed, so that bottlenecks and other issues can be identified quickly and addressed by the team.

eTMF Health   Claimed & Unclaimed   Documents Expiration   **Rejection & Clarification**   My Queries

1 - 13 of 13 (0 selected)

	Reason	Count
3a +	Missing Pages	18
+	Other	8
+	Image Quality	6
+	Blank Pages	6

3b Missing Pages 18

	Submitted Name
☐	
☐ → 🗎	Contact Details_List
☐ → 🗎	DataPrivacyAgreement
☐ → 🗎	Dr. C-CV

4 While queries are not always related to workflow, the **Open Queries by Age** dashlet offers the ability to identify queries to be prioritized for quick resolution, which has a large impact on completing QC reviews on time.
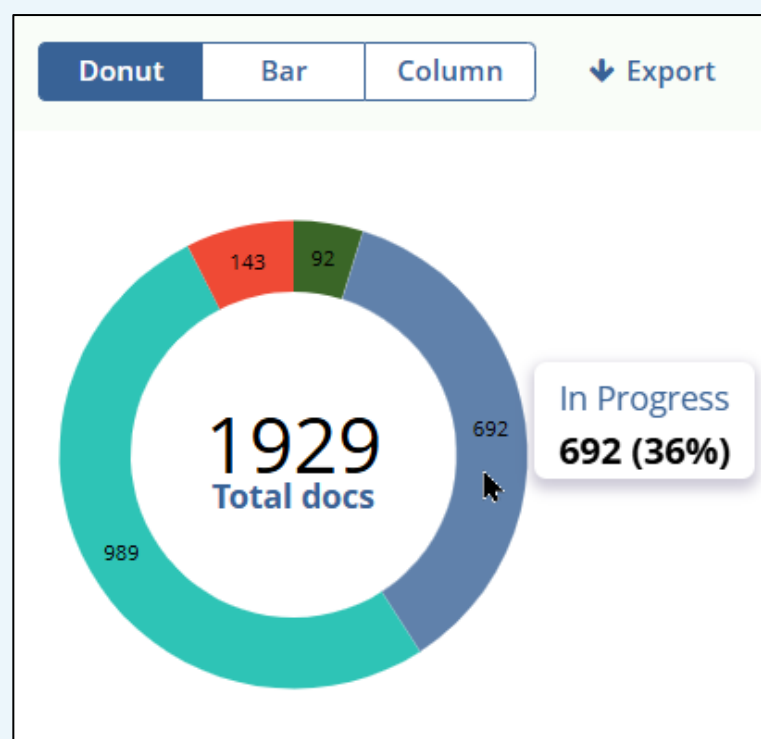
Workflow ▼

1 - 2 of 2 (0 selected)

Age	Count
▶ 30 days and older	51
4 ▼ Less than a week old	1

⬇ Export

Pending 1   ⟳   ▯ Manage Columns   👁 Views ▼

|	Submitted Name
☐	
☐ → 🗎 ✏	Conversation1.pdf

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5 The **By Workflow Status** Documents dashlet will display a breakdown of statuses in the form of a graph.
The slices on the graph are not interactable, so this one serves mainly an oversight purpose.

Users can also leverage the Documents Module to monitor progress of single documents through the workflow.
This can be done using Views under the Workflow group.
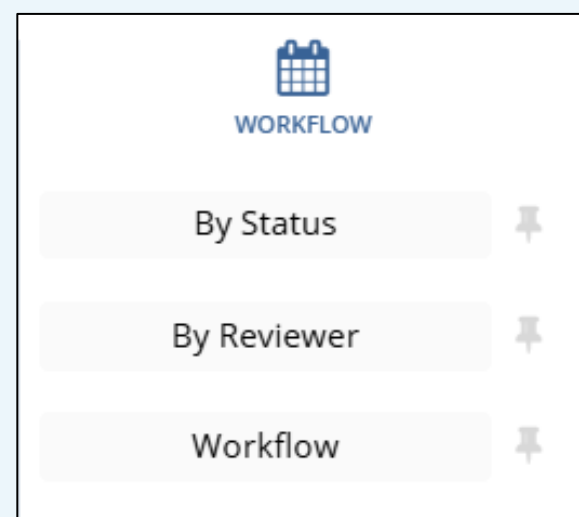
6 The **Workflow** view will display a breakdown of the existing workflows and their stages.
This is mostly helpful to understand the existing workload.
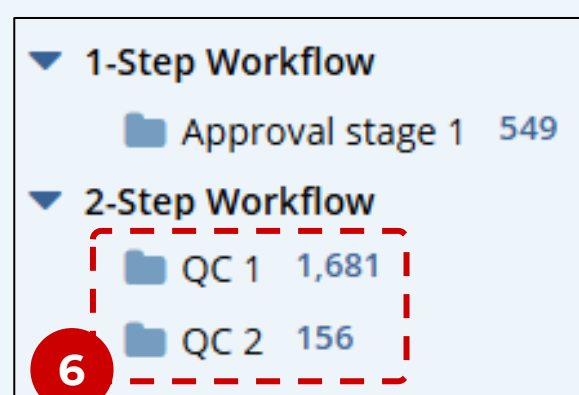
7 **By Status** and **By Reviewer** will make for a more granular view of where documents sit within a workflow at present time.