Workflow: How to Create a Query
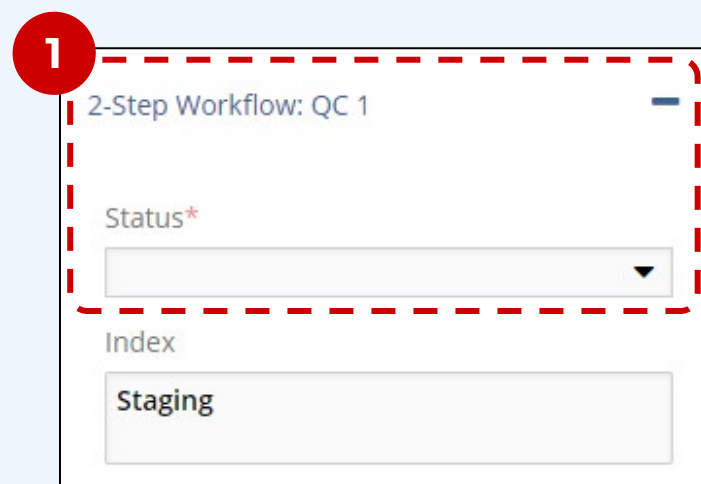
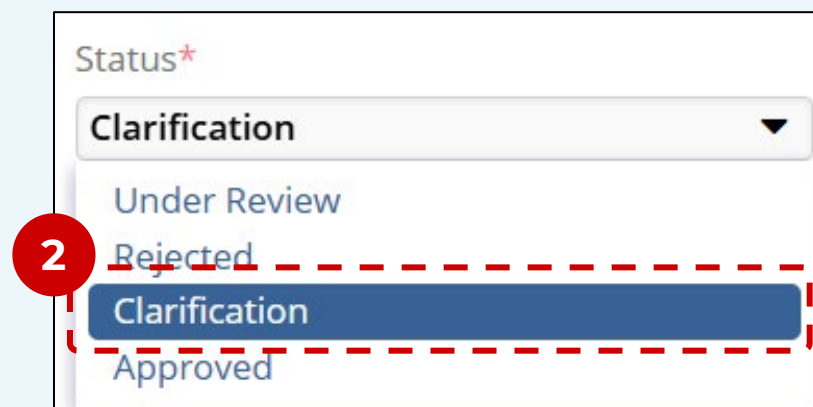**TI version 10.6**

TRIAL INTERACTIVE

APPLICABLE TO:

● Admin
● Manager
● Editor
○ Reader

● eTMF

This document details step only applicable to users assigned to QC groups and performing a review on a document. For more information see also related job aid: **How to QC a Document**.
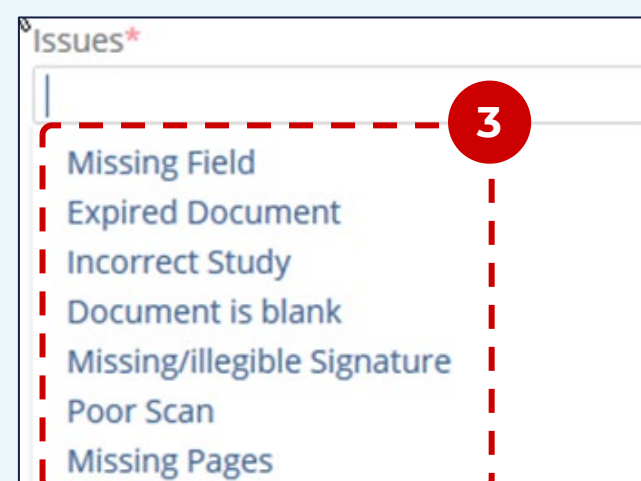
1 After performing Quality Check (QC) of a document where a need for clarification is determined, scroll down within the Metadata pane on the right to find **Status**.

1
2-Step Workflow: QC 1

Status*

Index
Staging

2 Under Status, select **Clarification**.

Status*
Clarification

Under Review
Rejected
Clarification
Approved

3 An **Issues** field appears. This is required. Select all applicable.

Issues*

Missing Field
Expired Document
Incorrect Study
Document is blank
Missing/illegible Signature
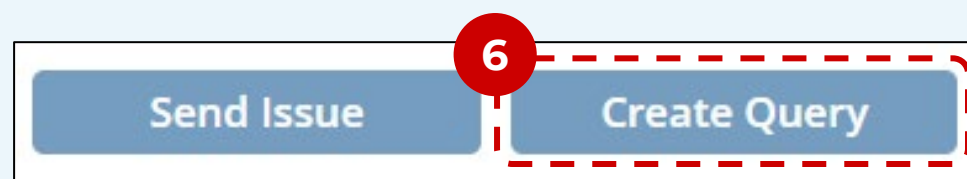Poor Scan
Missing Pages

4 Enter any relevant **Comments**.

📝 These are classified as <u>Reviewer comments</u>, which are workflow-specific and separate from the general *Comments* metadata field.

Comments
signature can't be verified: illegible

TRANSPERFECT LIFE SCIENCES
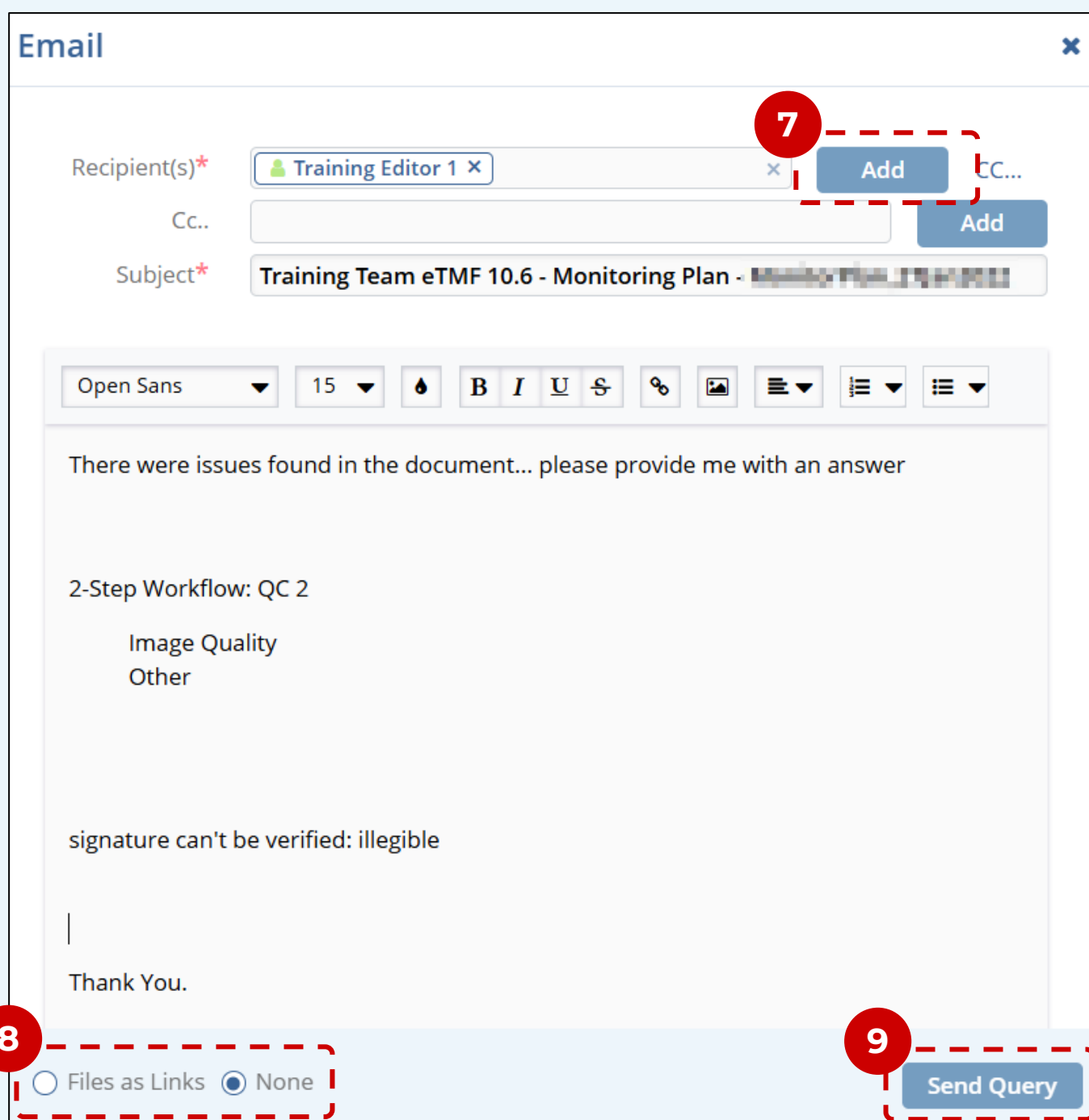
5 **Save** the changes made so far.

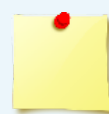**6** Click on the **Create Query** button.

7 A window opens where query text and recipient are pre-populated. Make changes as required (add recipients, rewrite text).

8 Some rooms may let you select how to deliver the document under query, if at all.

9 Click on the **Send Query** button.

Email

Recipient(s)* Training Editor 1 ✕   Add   Cc...

Cc..   Add

Subject* Training Team eTMF 10.6 - Monitoring Plan -

Open Sans   15   B I U S

There were issues found in the document... please provide me with an answer

2-Step Workflow: QC 2

    Image Quality
    Other

signature can't be verified: illegible

Thank You.

○ Files as Links ◉ None   Send Query

TRIAL INTERACTIVE

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

You can also easily identify any document that has an open query by looking for the **"?"** appearing next to the document icon.

ETMF

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By Site

By Country

8 Query By Sender

Query By Recipient