Workflow: How to QC a Document

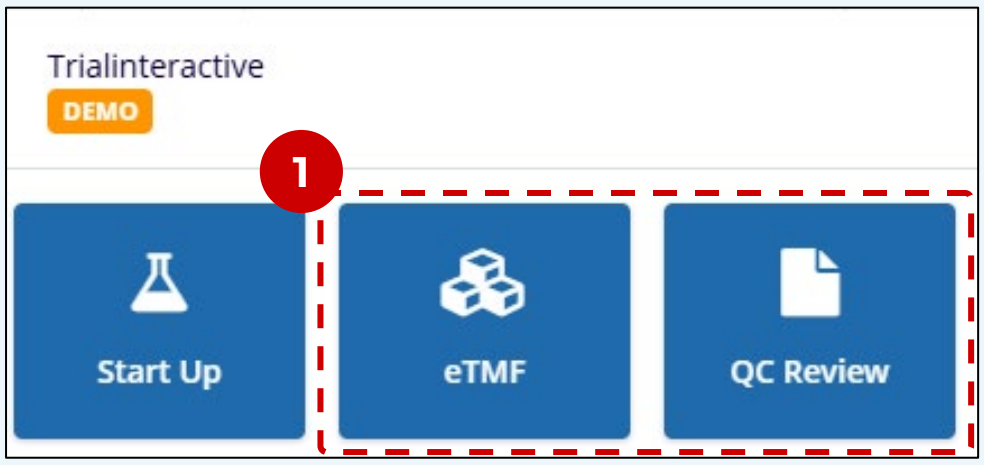
TI version 10.6

APPLICABLE TO:

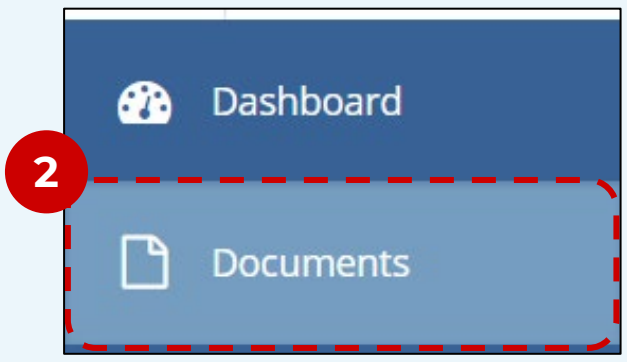
- ● Admin
- ● Manager
- ● Editor
- ○ Reader

- ● eTMF

1 Navigate to **eTMF** or **QC Review**.



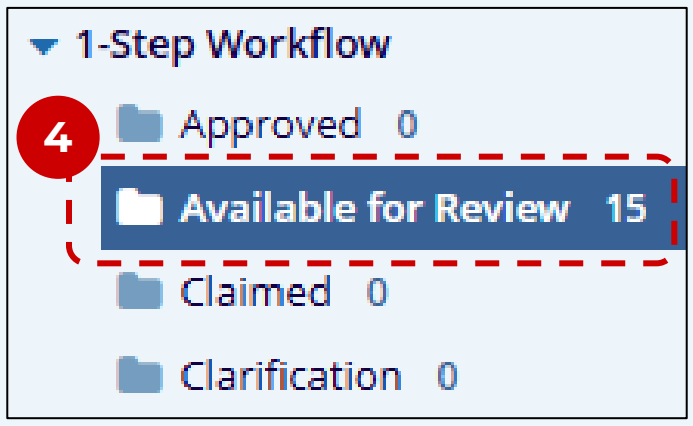
2 Navigate to the **Documents** module.



3 Select a workflow view. We recommend **My Workflow Assignments**.

This step is not required in the **QC Review** Module as it supports no view selection.

4 Select the **Available for Review** folder.



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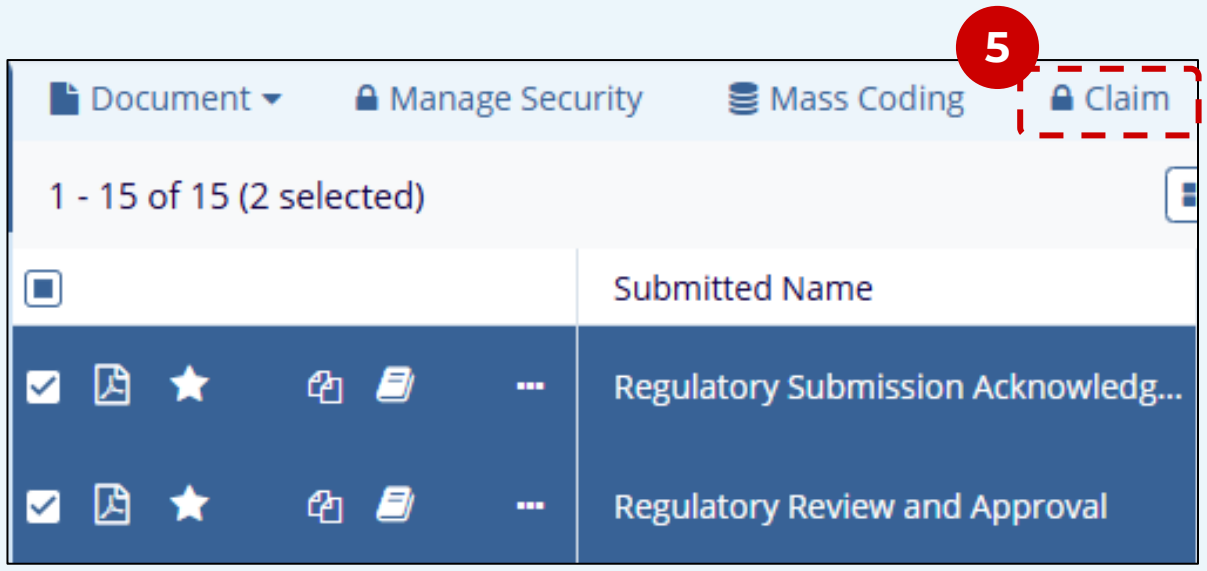
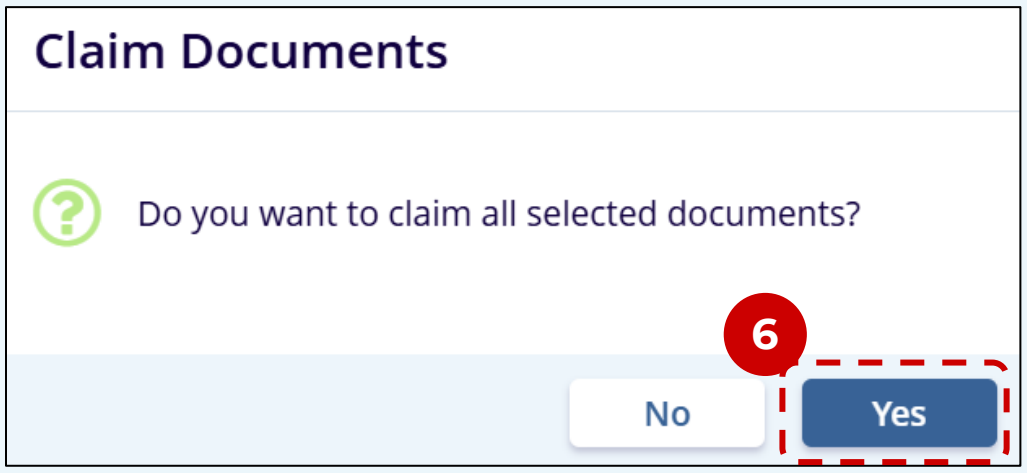
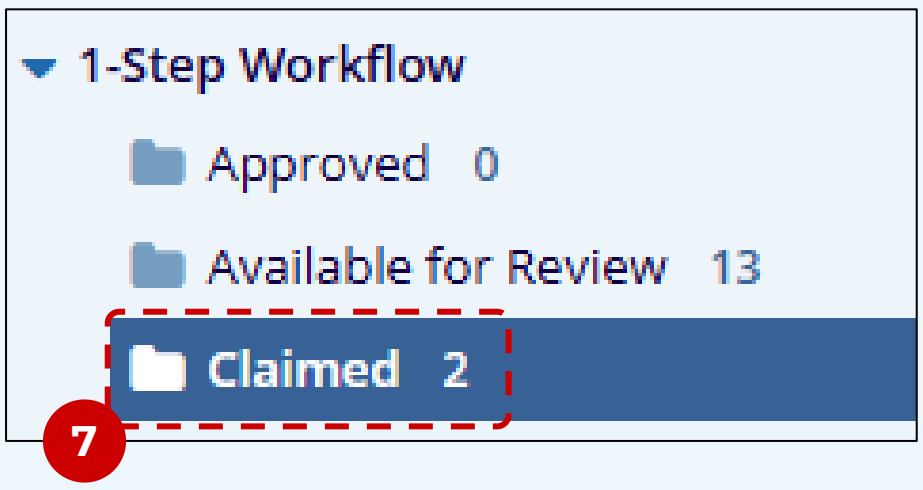
5 Select one or more documents, then click the **Claim** button located in the ribbon.



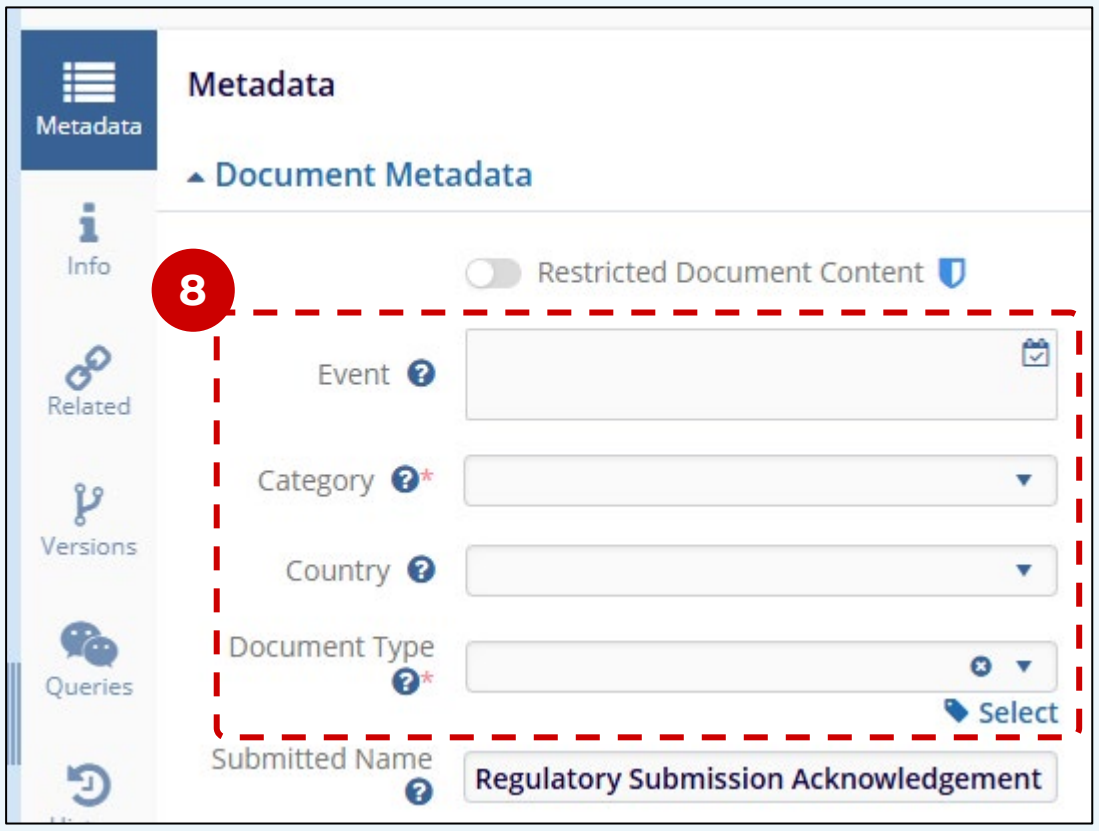
6 Respond **Yes** to the confirmation prompt.



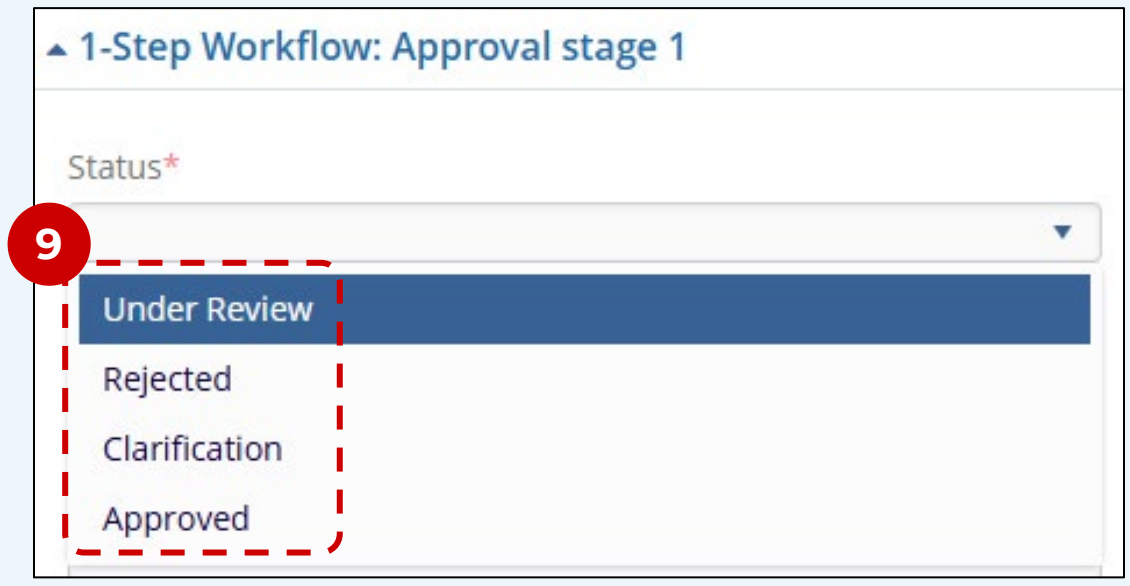
7 Now select the **Claimed** folder.



8 Select and review the content of one of the documents.
In the metadata pane, update or fill all required **Metadata Fields**.



9 Scroll down the side panel until you get to the Workflow section. Select the appropriate **Status** for your review decision.



The **Under Review** status can be use to temporarily sideline a document.
For the correct use of **Clarification** status, see the Job Aid: *Workflow How to Create a Document Query*.

10 **Save** changes at the bottom of the panel to complete the process.