Workflow: How to QC a Document

TI version 10.6

TRIAL INTERACTIVE

APPLICABLE TO:

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

● eTMF

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

Trialinteractive
DEMO

Start Up | eTMF | QC Review

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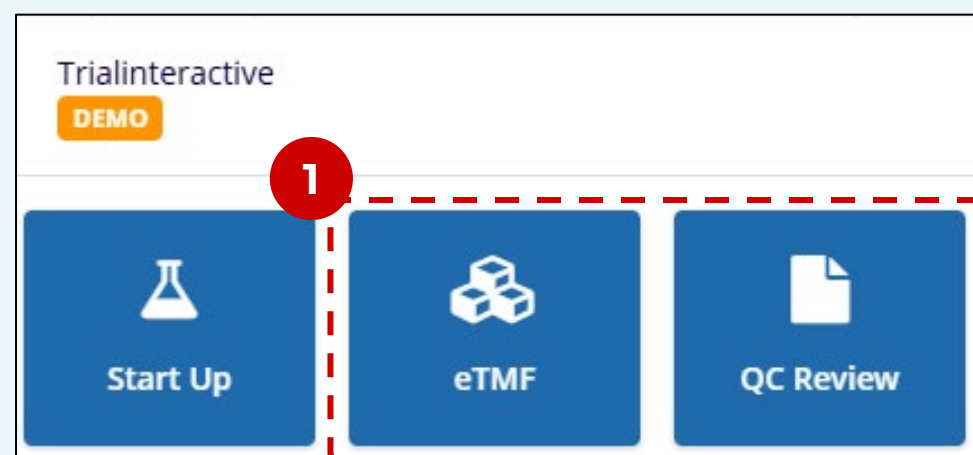
2 Navigate to the **Documents** module.
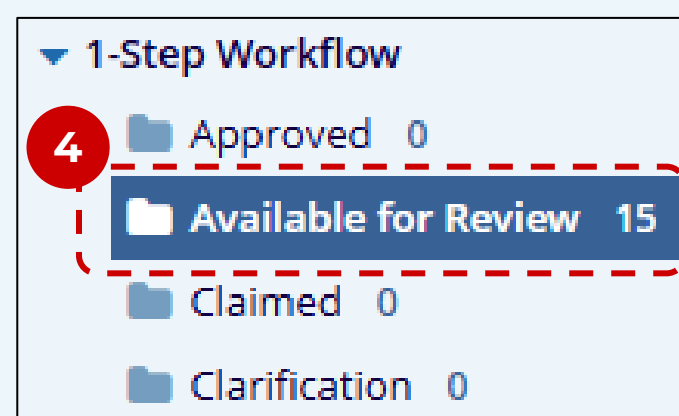
Dashboard

Documents

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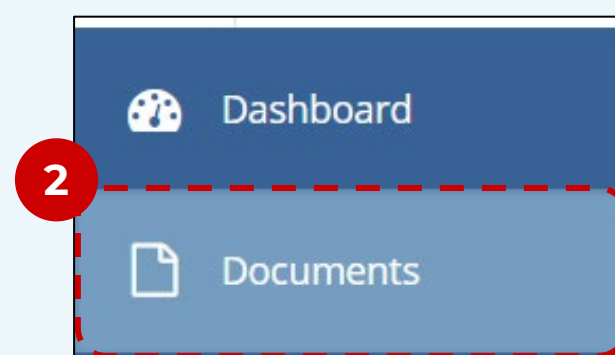
3 Select a workflow view. We recommend **My Workflow Assignments**.

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

MY LIST

My Workflow Assignments

My eSignatures

My Submitted

WORKFLOW

By Status

By Reviewer

By Workflow

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

▼ 1-Step Workflow
  📁 Approved 0
  📁 Available for Review 15
  📁 Claimed 0
  📁 Clarification 0

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

| | Document ▾ | 🔒 Manage Security | 🗃 Mass Coding | 🔒 Claim |

1 - 15 of 15 (2 selected)

■		Submitted Name
☑ 📄 ⭐ 🗂 📖 ⋯		Regulatory Submission Acknowledg...
☑ 📄 ⭐ 🗂 📖 ⋯		Regulatory Review and Approval
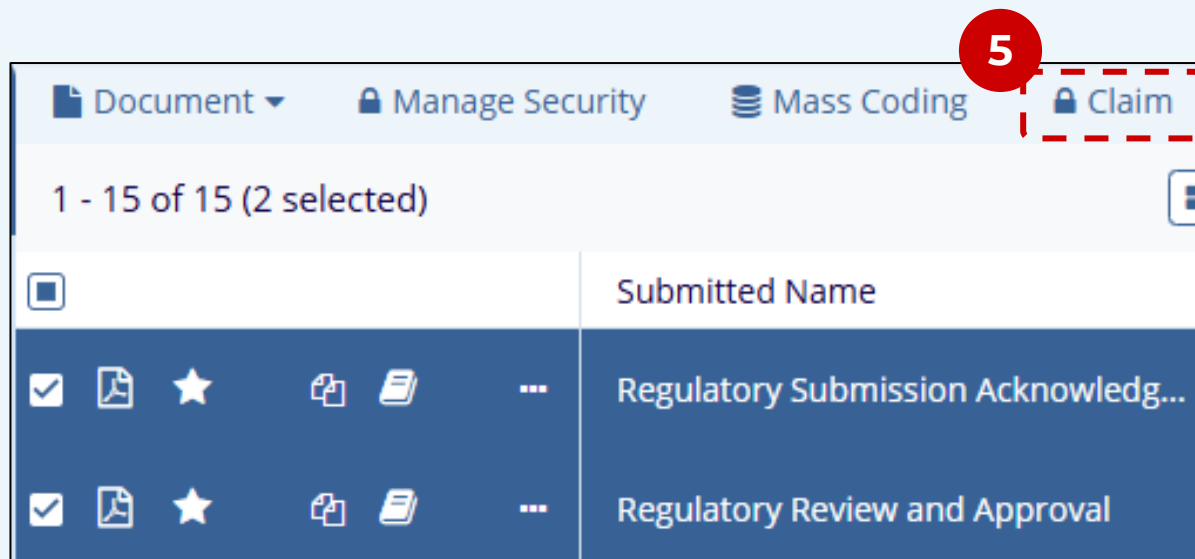
6 Respond **Yes** to the confirmation prompt.

Claim Documents

❓ Do you want to claim all selected documents?

| No | Yes |
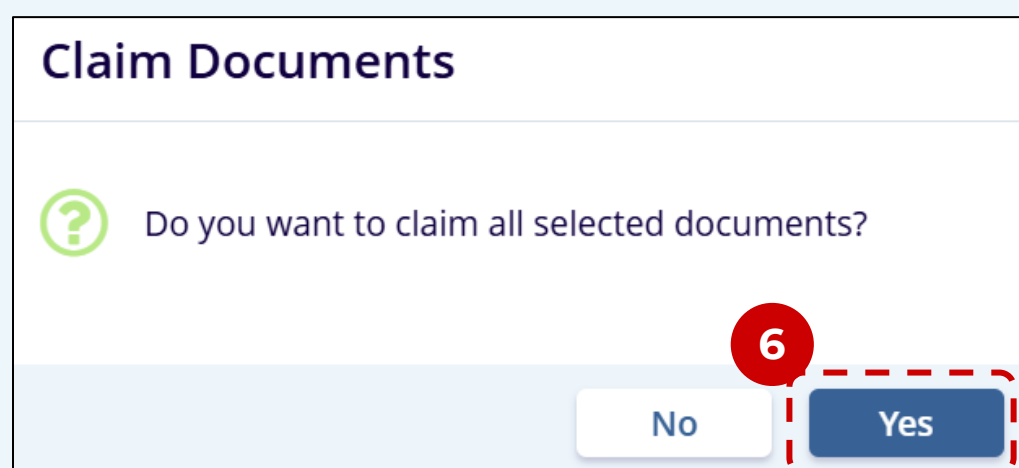
7 Now select the **Claimed** folder.

▼ 1-Step Workflow
📁 Approved   0
📁 Available for Review   13
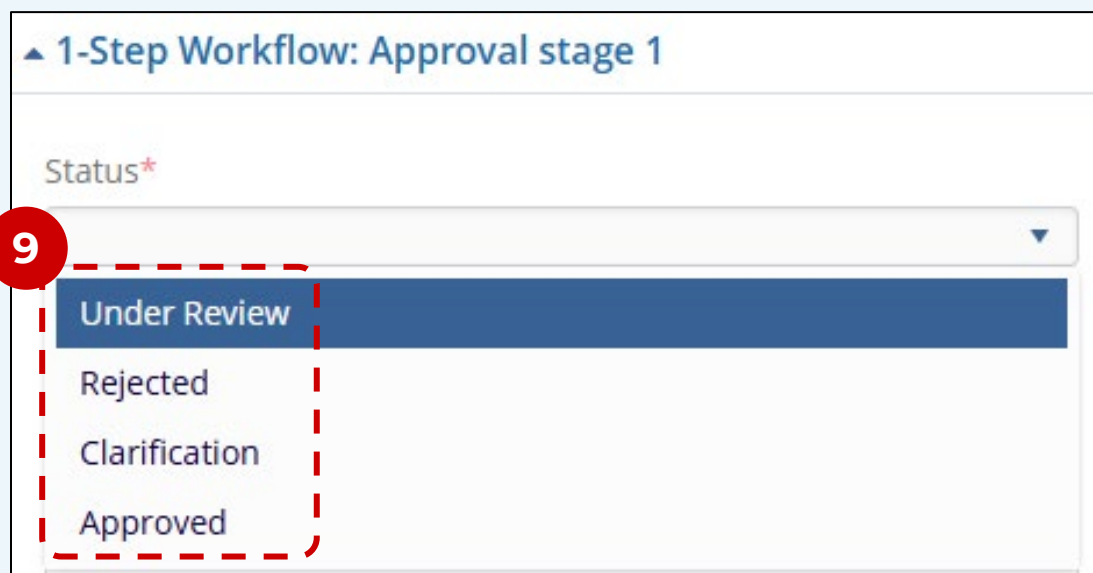📁 Claimed   2
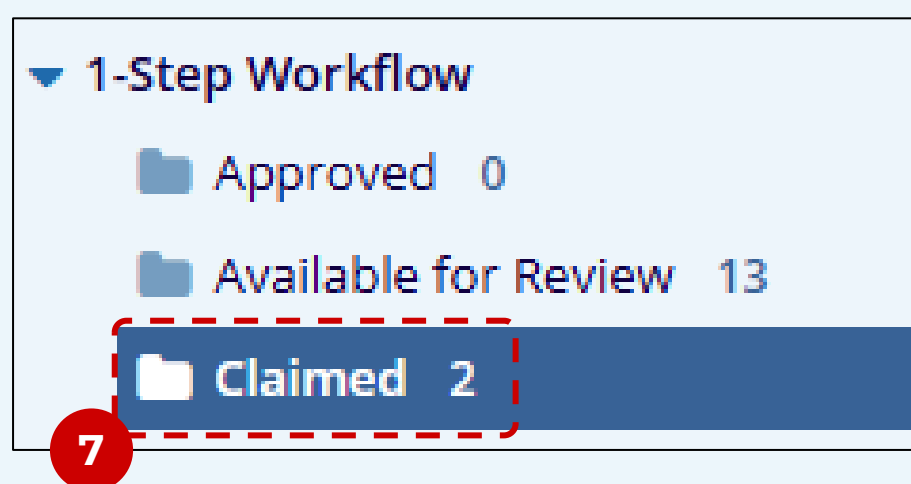
8 Select and review the content of one of the documents.
In the metadata pane, update or fill all required **Metadata Fields**.

Metadata

▲ Document Metadata

☐ Restricted Document Content 🛡

Event ❓

Category ❓*   ▼

Country ❓   ▼

Document Type ❓*   ✕ ▼
🏷 Select

Submitted Name ❓   Regulatory Submission Acknowledgement

Info
Related
Versions
Queries

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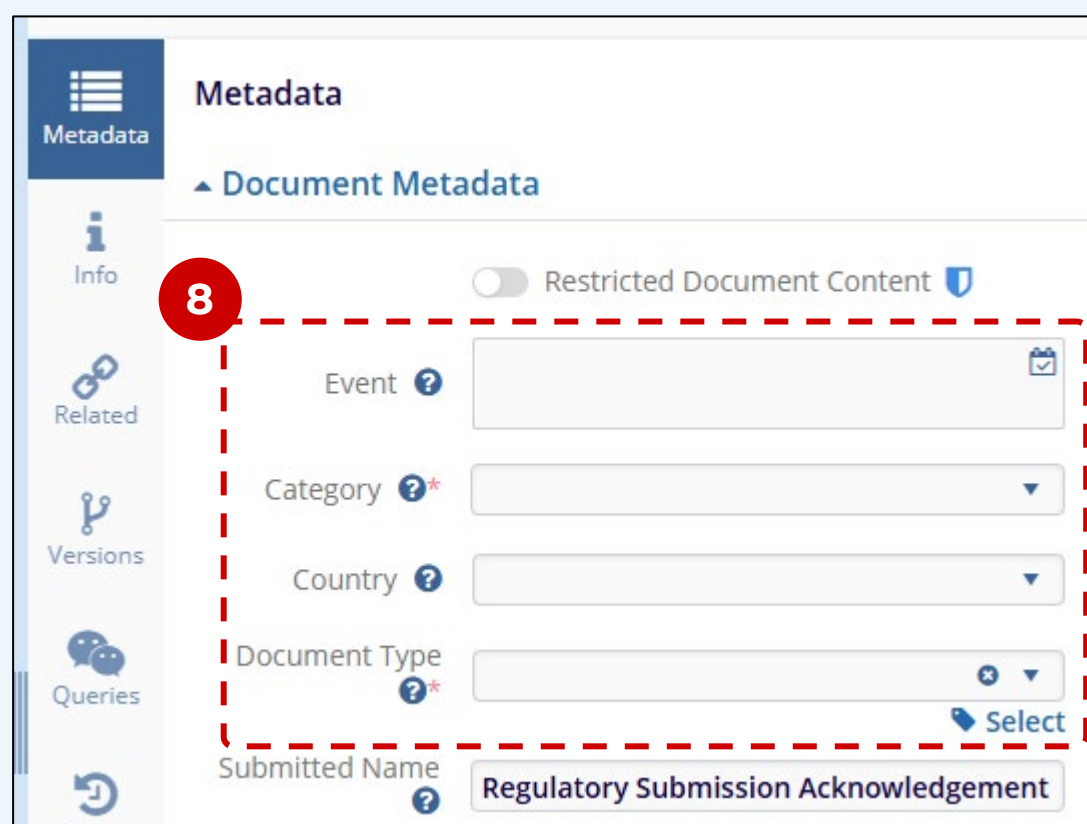
9 Scroll down the side panel until you get to the <u>Workflow</u> section.
Select the appropriate **Status** for your review decision.

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*.

9

▲ 1-Step Workflow: Approval stage 1

Status*

- Under Review
- Rejected
- Clarification
- Approved

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

10

Save   Save & Next