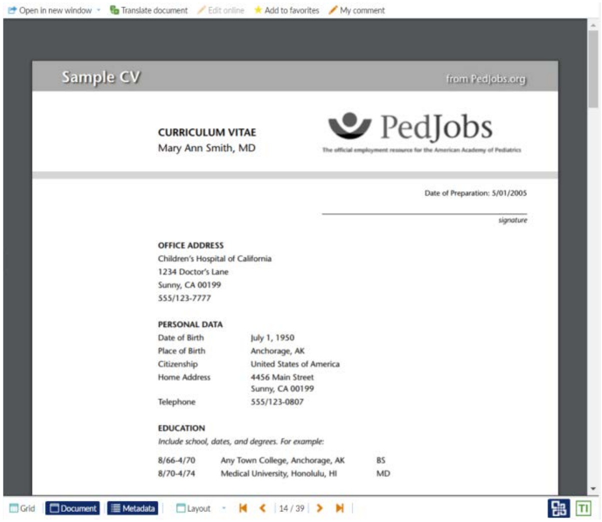
Workflow: How to Create a Document Query

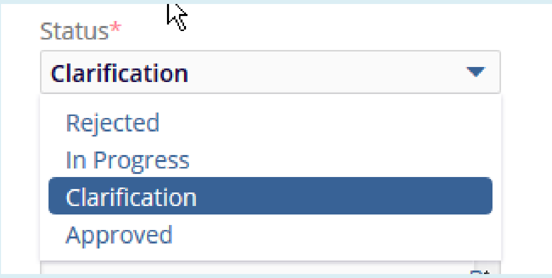
Applicable to: ☑ Administrators ☑ Editors ☑ eTMF

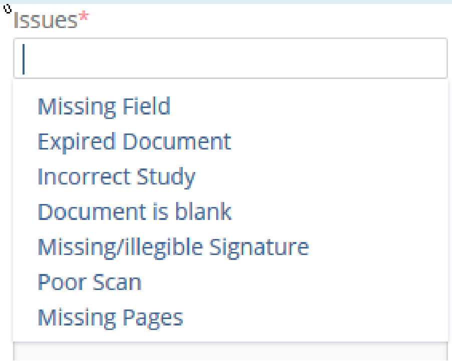
Note: The following steps assume the user is familiar with Workflow review and added to a Workflow group; see related job aid: How to QC a Document



1. After performing a Quality Check (QC) of a workflow document, scroll down within the Metadata pane

2. Under **Status**, select Clarification (system status; the display name may be different)

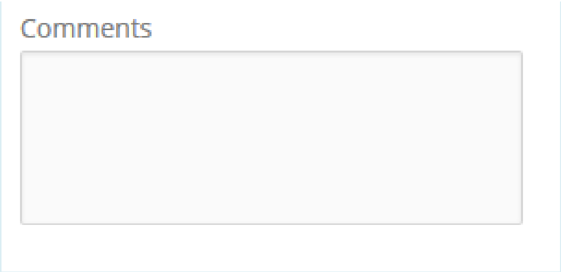




3. Under **Issues**, select all that are applicable

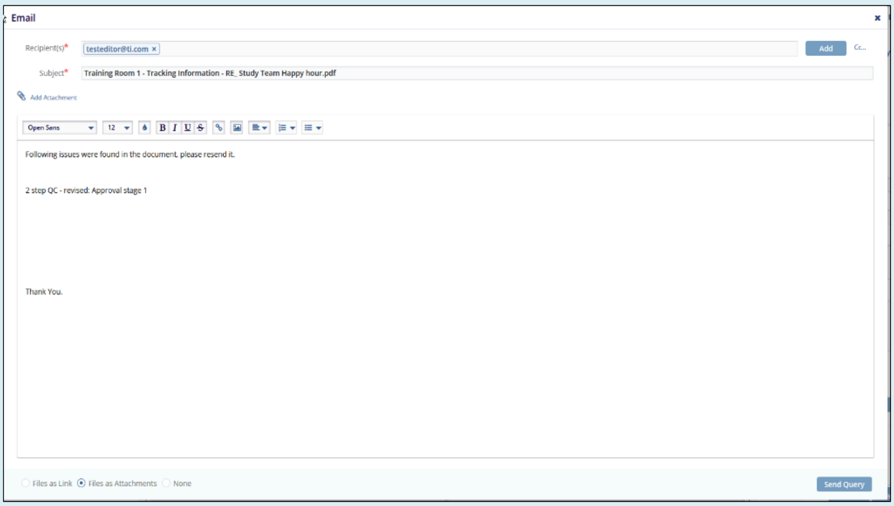
Click anywhere outside the drop down menu to collapse it

4. Enter any relevant **Comments** (these are reviewer Comments which are not the same as the general Comments field)



Workflow: How to Create a Document Query

5. Initiate an email Query by clicking on the **Create Query** button as shown above



6. The Query email auto-populates. Click **Add** or **CC** to update recipients.

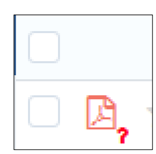
Do ***not*** change the **Subject**

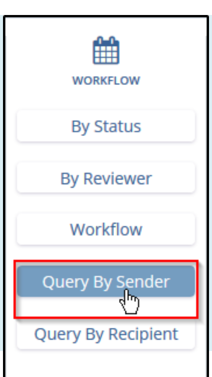
Update the email body as necessary

Click **Send Query**

7. Click **Save** to update the document status

The document icon in the grid updates with a "?"





8. View a **Query** by changing the document view to **Query By Sender**

See related guide:
How to Resolve a Workflow Query

For any additional assistance, click …

TRANSPERFECT LIFE SCIENCES