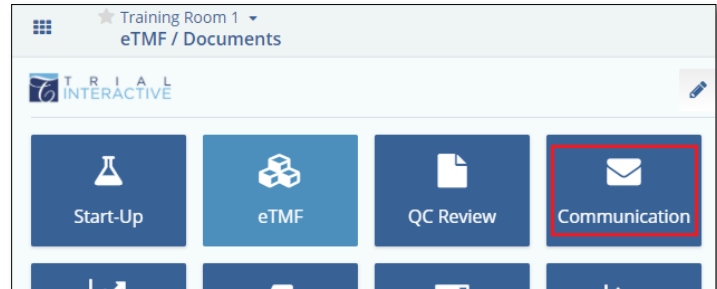



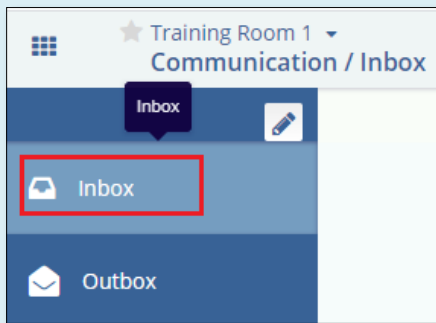
Applicable to:  Administrators  Editors  Readers  eTMF

1. Login to a study room and navigate to the **Communication** application by clicking the grid on the top left.

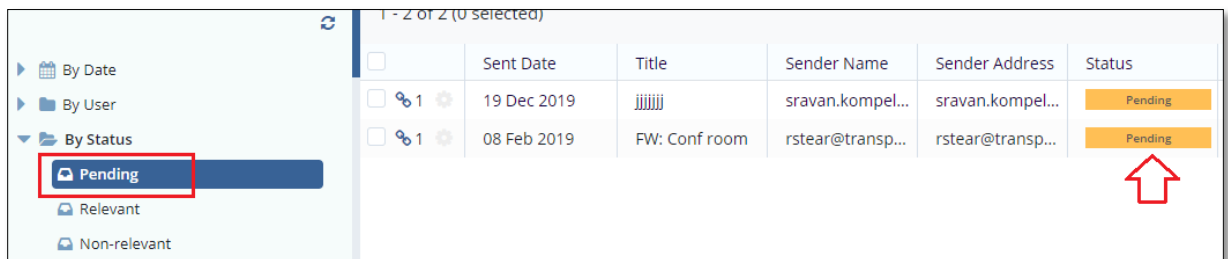


Contact the room Administrator if this module is not visible; see related job aid:  
 **How to Enable the Correspondence Inbox**

2. Click on **Inbox**.

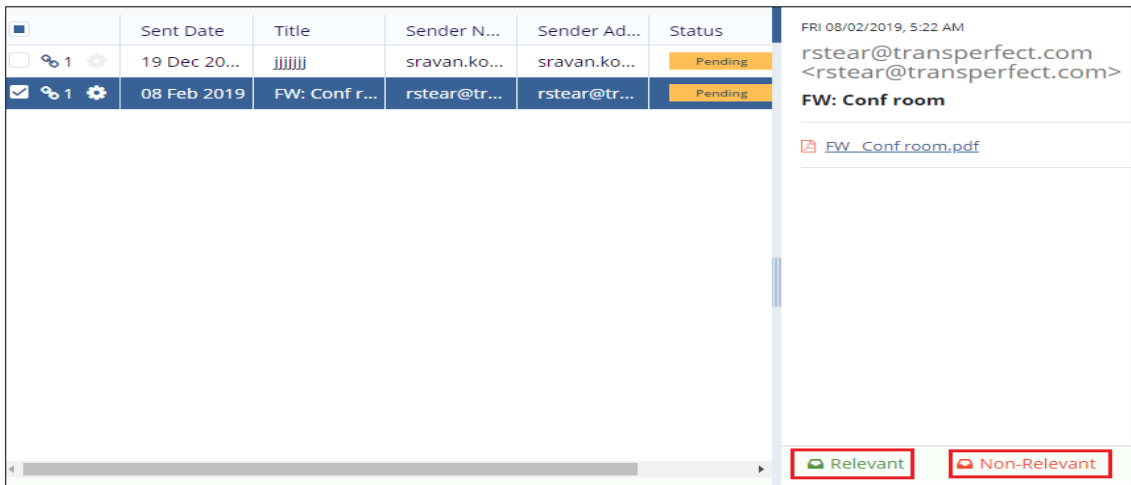


3. Under the **By Status** area, click **Pending**.



**Pending** status signifies that the communications received have not been marked as Relevant or Non-relevant.

## 4. Select a Communication record.



In the right-hand panel, the email and any attachments are visible.

Choose to mark the communication as either:

- **Relevant** (green icon) indicating that the communication is significant and relevant to the study. Metadata will be required and the record will be filed in the eTMF.
- **Non-relevant** (red icon) The communication should not be moved to the eTMF; it will remain stored in this application.
- Proceed to **step # 5**, if marking as **Relevant**
- Or jump to **step # 6**, if marking as **Non-relevant**



***Once a communication record is marked as Relevant or Non-relevant, it can not be updated or changed***



5. After marking a communication as **Relevant**, complete the document profile.

Click **Finish**.

**New Document Profile** Step 1

**Document Metadata**

Category \*  This field is required

Country

Document Type

Submitted Name \*

Comments ?

File Name

Index

Generated Name

Skip this document



Based on **Communication Inbox Settings**, if attachments are not merged, each attachment will be created as a separate communication record. The user will be prompted to enter metadata for **each attachment**.

**Communication inbox**

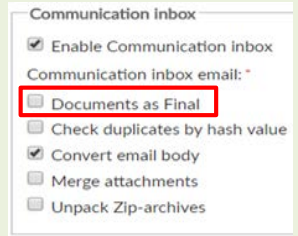
- Enable Communication inbox
- Communication inbox email: \*
- Documents as Final
- Check duplicates by hash value
- Convert email body
- Merge attachments
- Unpack Zip-archives

The communication record is now moved to the **Relevant** folder.

- ▶ By Date
- ▶ By User
- ▼ By Status
  - Pending
  - Relevant
  - Non-relevant

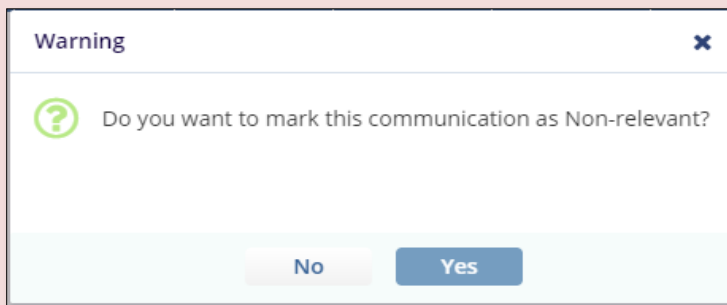
## Communication marked as **Relevant** (cont.)

- If **Documents as Final** *is* checked in **Settings**, the Document Status becomes “Final” but the document does not get routed to the final folder location.
  - An Admin user will need to manually move the document to its final folder destination.
- When **Documents as Final** *is not* checked, the document is routed to the Workflow (if one is enabled) for review and approval.



- This setting works with the **Enable auto indexing** setting. When auto-indexing is *enabled* and **Documents as Final** is checked, the record is placed in the **default index position**.
- When auto-indexing is *disabled* and **Documents as Final** is checked, the user selects the index position and the document will be moved to that location.

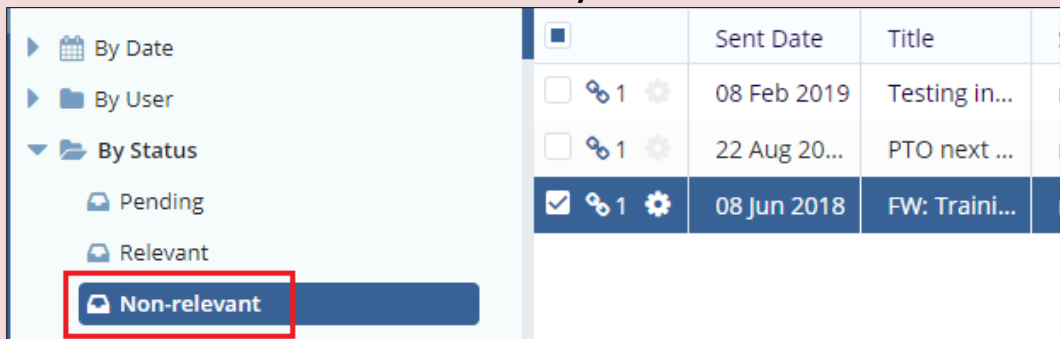
## 6. When a communication is marked as **Non-relevant**, a Warning window displays to verify the selection.



Click **Yes**.



The communication record is now moved to the **Non-relevant** folder. **Non-relevant** communications will not move to the eTMF index. Any attachments are accessible in the folder **By Status > Non-relevant**



For any additional assistance, click ...

