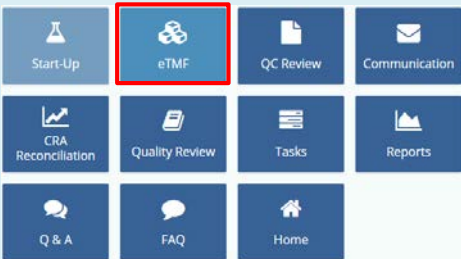


Applicable to: Administrators Editors Readers eTMF Study Start-up

Note: The following steps assume a Workflow Query was created and needs resolution;
see related job aid: How to Create a Document Query

Users who receive Query messages from Trial Interactive can respond via email with information and/or new versions of documents.

A reply email, complying with text instruction to **not change** the Subject field, will be captured within the Query ID thread for resolution review.



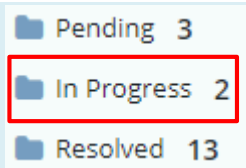
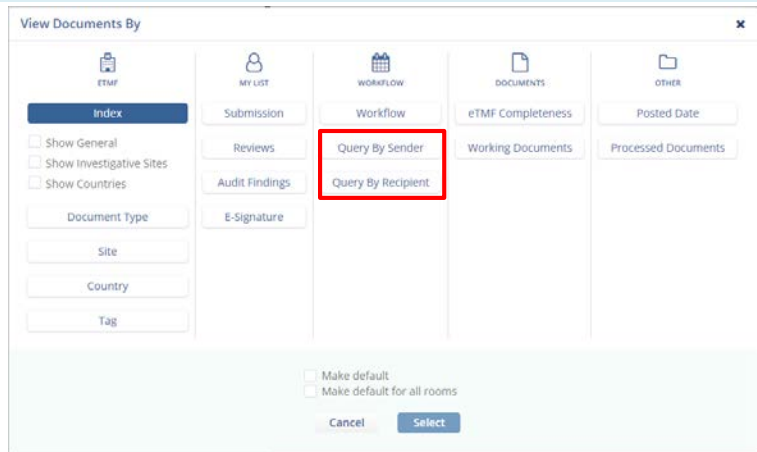
1. Login to the room and navigate to the **eTMF**.

Note: users must *first* be added to the Workflow group(s) by the room Administrator



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

Select
Query By Sender
or
Query By Recipient



3. Find the **In Progress** query to resolve

Note: Pending = query sent; In Progress = response received; Resolved = closed

Tip: You can also use the Search function to find a query by the Query Id.

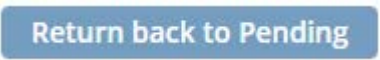
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Query Id ▾	Query ...	Submitted Name
<input type="checkbox"/>				206-2903	21 Jan ...	InformedConsent...
<input type="checkbox"/>				206-3439	13 Feb...	Informed Consen...

4. Select the record and its **Metadata**.

5. View the reply responses and/or attachments by expanding the In Progress query or by clicking the Query History button.



If the only Response is an auto-generated out of office notice, best practice recommends returning status back to Pending.



6. If the response(s) adequately address the issue(s), click **Resolve Query**.

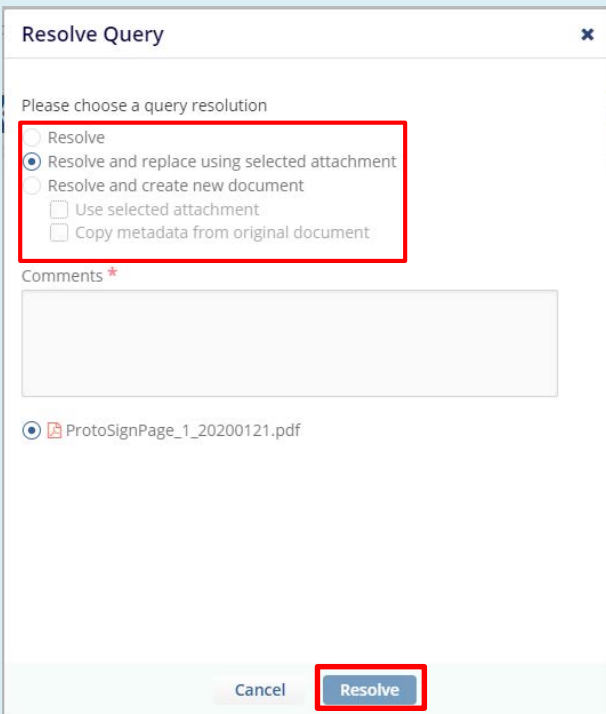


7. Choose the desired action:

a. Select **Resolve**.

b. Select **Resolve and replace using selected Attachment**.

c. Select **Resolve and create new document**.



Click **Resolve**

8. The query then moves to the Resolved folder.

The document-type icon will change to reflect that the query has been resolved.



9. Complete the Workflow QC review for the document.

For any additional assistance, click ...

