T R I A INTERACT	L Workflow: Hov IVE	orkflow: How to Create a Query TI v 10.2		
APPLICABLE TO:	Administrators	• eTMF		
	Editors	🔿 Study Start-Up		
	O Readers	O myTl		

<u>Note</u>: The following steps assume the user is familiar with the QC Workflow and has been added to a Workflow group; see the related job aid: **How to QC a Document**

ample CV				frem Red jobs erg
	CURRICULUM Mary Ann Smit	VITAE h, MD Based	Pec	lJobs
				Date of Preparation: 5/01/2005
				signature
	OFFICE ADDRESS			
	Children's Hospital	of California		
	1214 Doctor's Lary			
	Sunny, CA 00199			
	555/123-7777			
	PERSONAL DATA			
	Date of Birth	July 1, 1950		
	Place of Birth	Anchorage, AK		
	Citizenship	United States of America		
	Home Address	4456 Main Street Sunny, CA 00199		
	Telephone	555/123-0807		
	EDUCATION			
	include school, date	s, and degrees. For example:		
	8/66-4/70 A	ny Town College, Anchorage, AK	85	
		fedical University, Honolulu, HI	MD	

1. After performing a Quality Check (QC) of a workflow document, scroll down within the Metadata pane on the right to find **Status**.

2 ste	p QC - revised: Approval stage 1	-
5	Status*	
	Clarification	-
1	ssues*	
1	ndex	
	03 Regulatory\03.04 General\03.04.02 Tracking Information	• XII B
-	Comments	

2. Under Status, select Clarification.

ls	sues*
	Missing Field
	Expired Document
	Incorrect Study
	Document is blank
	Missing/illegible Signature
	Poor Scan
	Missing Pages
1	

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

4. Enter any relevant **Comments.**

(these are Reviewer comments which are not the same as the general comments field)

Clarification	-
Rejected	
In Progress	
Clarification	
Approved	

Comments		



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T R I A L INTERACTIVE

How to Create a Document Query

TI v 10.2

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

Email	×
Recipients* [cestediard6.com x]	Add Cc
5.4)ect* Training Room 1 - Tracking Information - RII, Study Team Happy hour pdf	
S All Auchment	
Openies v U v 8 BIES % @ Rv Iv Iv	
Following issues were found in the document, please resend it.	
2 stop QC -revised: Approval stage 1	
Thurk You.	
C Files as Link	Send Query

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

Cancel Save & Next

6. The Query email autopopulates. Click **Add** or **CC** to update recipients.

- > Do **not** change the **Subject**
- Update the email body as necessary
- Click Send Query



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

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



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