Workflow: How to Create a Query

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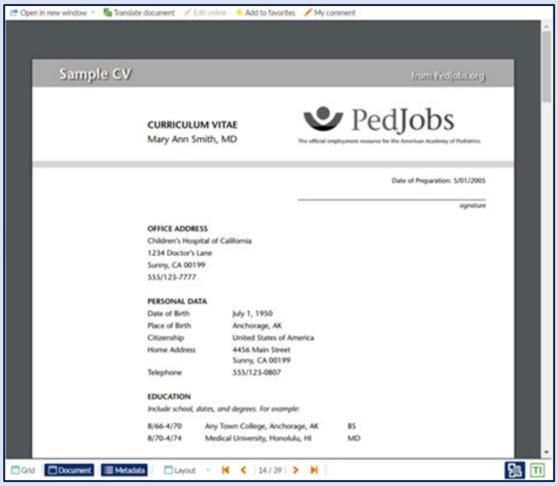
APPLICABLE TO:

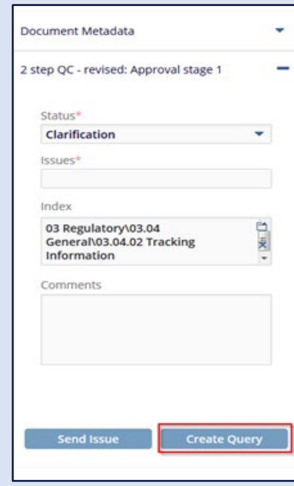
- ● Administrators
- ● Room Managers
- ● Editors
- ○ Readers

- ● eTMF
- ○ Study Start-Up
- ○ myTI

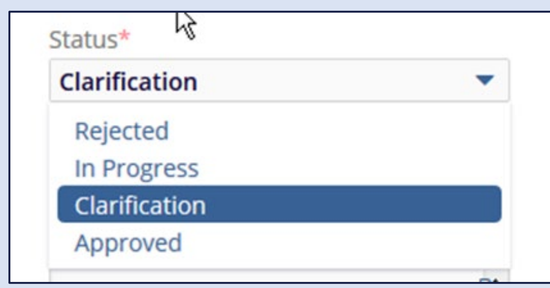
<u>Note</u>: The following steps assume the user is familiar with the QC Workflow and has been added to a Workflow group; see the related job aid: **How to QC a Document**

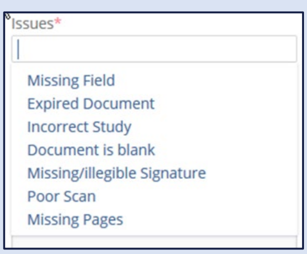


1. After performing a Quality Check (QC) of a workflow document, scroll down within the Metadata pane on the right to find **Status**.



2. Under **Status**, select **Clarification.**





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)

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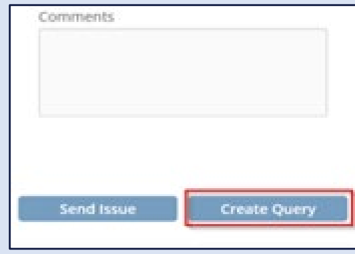
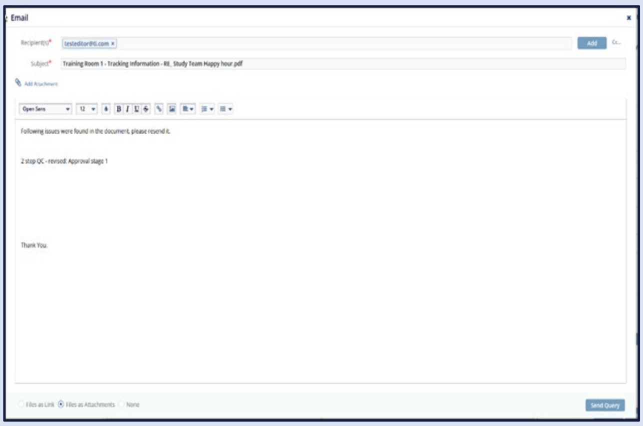
5. Initiate an email Query by clicking on the **Create Query** button.

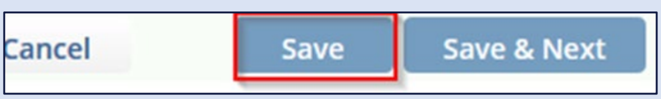


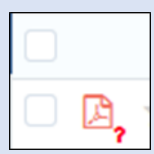


6. The Query email auto-populates. Click **Add** or **CC** to update recipients.

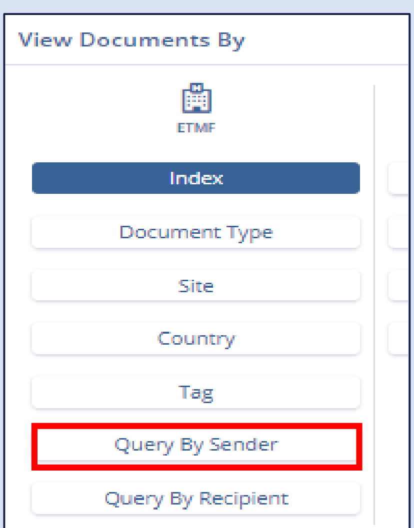
- Do **not** change the **Subject**
- Update the email body as necessary
- Click **Send Query**

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.**