

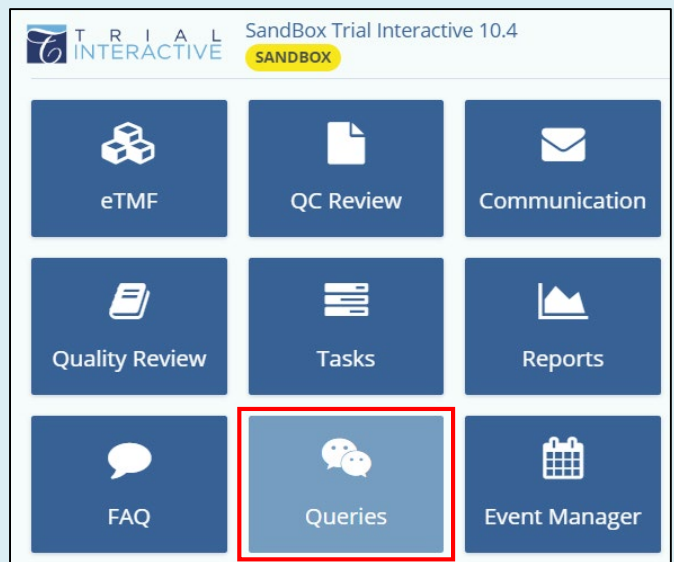
APPLICABLE TO:

- Administrators
- eTMF
- Managers
- Study Start-Up
- Editors
- myTI
- Readers

Users who receive Query messages from Trial Interactive can respond via email, as well as within TI, to supply required information and/or new versions of documents.

When using email as a response method, the reply will be captured within the unique Query ID thread for review, so long as the responder does not change the Subject Line of the email when replying.

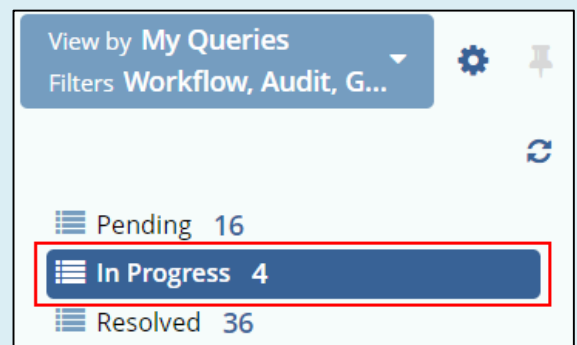
1. Login to a room. Select **Queries** within the Navigation Grid.



2. The default view for this module is 'My Queries', showing queries assigned to or created by the current user. Select the **In Progress** group.



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



3. Select a record from the Grid list and expand the metadata panel.

1 - 4 of 4 (1 selected)

<input checked="" type="checkbox"/>	Subject	Query Id	Status	Type	Documen...	D
<input type="checkbox"/>	Traini...	104-660	IN PROGRE...	Workflow	1234_...	5
<input type="checkbox"/>	Traini...	104-651	IN PROGRE...	Workflow	1234_...	2
<input checked="" type="checkbox"/>	Traini...	104-583	IN PROGRE...	Workflow	Trainin...	4

4. Scroll down the side panel to review the query-related activity for this document.

You can add more responders to your query by using **Add Assignees**.

Click on the **filetype icon** within an activity to open attachments (when present).

Expand

Query 104-583

IN PROGRESS

Workflow

Training Team eTMF 10.3_CheckSum

Message Info Metadata

To 3 Assignees

Editor 107 Reader 102 Editor 102

[+ Add Assignees](#)

Editor 107 9/8/2022 6:37:44 AM EDT

Subject
Training Team eTMF 10.3 - - Training Team eTMF 10.3_CheckSum

PLEASE DO NOT CHANGE THE EMAIL SUBJECT. PLEASE RESPOND TO THIS EMAIL WITH A DOCUMENT.

Activity

Reader 102
RESPONSE 4/20/2023 10:42:51 AM EDT

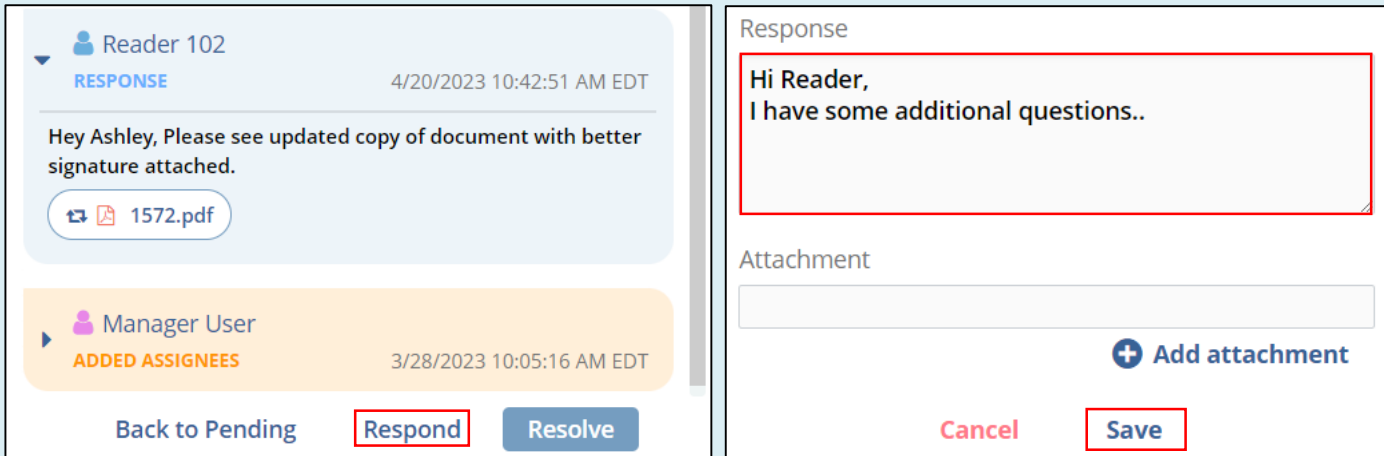
Hey Ashley, Please see updated copy of document with better signature attached.

1572.pdf

Manager User
ADDED ASSIGNEES 3/28/2023 10:05:16 AM EDT

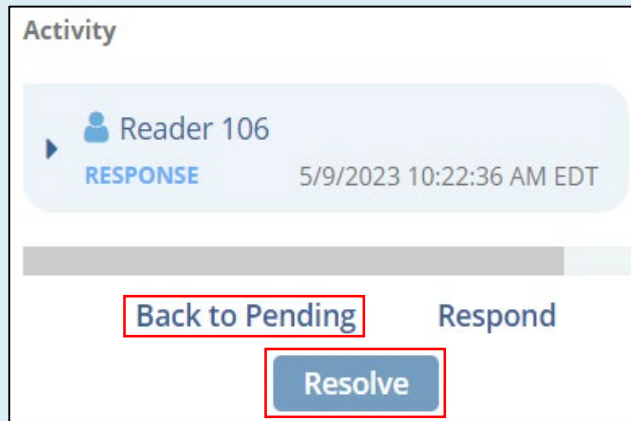
Back to Pending Respond Resolve

5. In case the response is insufficient and you wish to ask additional questions, use **Respond** to write an additional inquiry to the query assignee(s). Hit **Save** to send.



The screenshot shows a query interface with two main sections. On the left, a message from 'Reader 102' is displayed, dated 4/20/2023 10:42:51 AM EDT. The message says 'Hey Ashley, Please see updated copy of document with better signature attached.' and includes an attachment '1572.pdf'. Below this, a 'Manager User' action is shown, dated 3/28/2023 10:05:16 AM EDT. At the bottom of this section are three buttons: 'Back to Pending', 'Respond' (highlighted with a red box), and 'Resolve'. On the right, a 'Response' dialog box is open, containing the text 'Hi Reader, I have some additional questions..' and an 'Attachment' field. Below the dialog are 'Cancel' and 'Save' buttons, with 'Save' highlighted by a red box.

6. If the response received adequately addresses the issue, click the **Resolve** button instead.



The screenshot shows the 'Activity' section of the interface. It displays a message from 'Reader 106' dated 5/9/2023 10:22:36 AM EDT. Below the message, there are three buttons: 'Back to Pending' (highlighted with a red box), 'Respond', and 'Resolve' (highlighted with a red box).



If an out-of-office message is received, users can reset the query status using the **Back to Pending** button.

7. Add **Comments** (required), then choose from the following options:

- a. **Resolve** - use this option when you received a final answer to your question and just wish to close the query
- b. **Resolve and replace using selected attachment** - helpful if you intend to carry on the existing Workflow review with new document content you have received
- c. **Resolve and create new document** - use this if you intend to generate a new document for later review (the current review will typically be rejected)

Resolve Query ✕

Comments *

Please choose a query resolution

Resolution*

Resolve ▾

Resolve

Resolve and replace using selected attachment

Resolve and create new document

8. Among these option, only *c.* will offer extra options: you may create a new document using an attachment received via query response, and you may copy existing metadata.

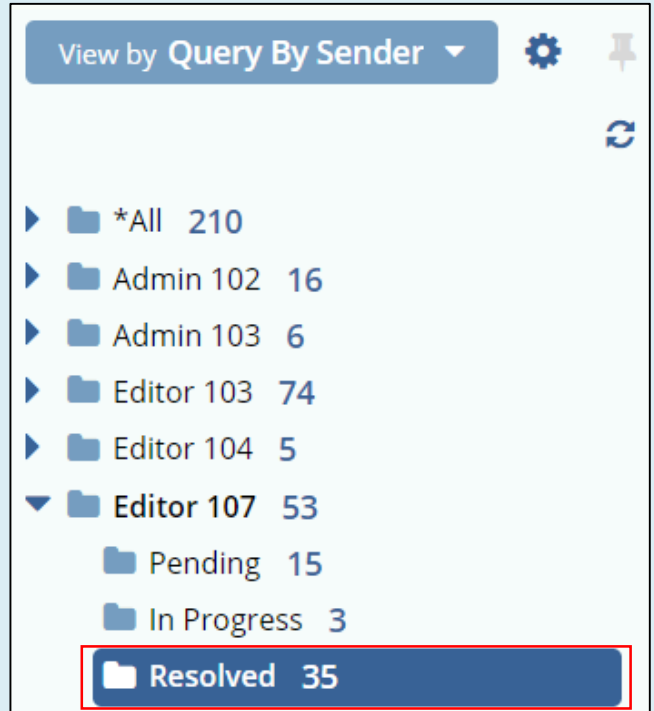
Resolution*


Resolve and create new document ▾

Use selected attachment

Copy metadata from original document

9. Finally, any completed queries will move to the “Resolved” subfolder.



 The related document’s icon will update in the Grid to reflect the fact that there are no pending queries for this document.



10. Remember to manually complete the Workflow review for the related document, changing its review status within the Metadata tab.

