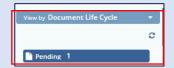
How to Create and Assign a Controlled Document e-Signature Request TI v 10.2

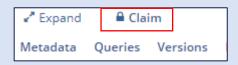
APPLICABLE TO:	Administrators	O eTMF
	Editors	Content Management
	O Readers	O myTl

Change Control Documents can have e-Signature as a required step for workflows. A document must be claimed in order to begin the **e-Signature** process.

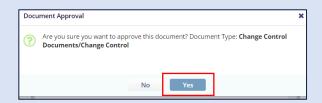
 Go the view by Document Life Cycle view and select the document from the Pending folder.



2. Click **Claim** at the top of the metadata pane.



3. Choose the appropriate review status from the **Status** drop down and click **Save**, then yes.



The document is now moved into the **Waiting for e-Signature** folder for the second step of the workflow review process.

Waiting for e-Signature 1



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4. Select the document from the Waiting for e-Signature folder and click Claim to create the e-Signature Request.

Metadata Queries Versions History

March 2021 Test Data Management Plan

Document Metadata

CC with Signature: e-Signature

Create E-Signature request

Status*

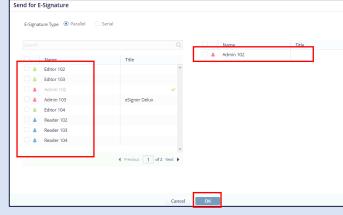
Index

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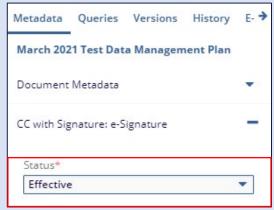
Internal Clinical Operations
Management

Comments

5. Select the appropriate users who must e-Sign the document, then click **OK**.



The document is now routed for e-Signature and must be signed by all parties in order for the **Document Owner** to change the status to **Effective.**



Tip: For information on completing an e-Signature, see related Job Aid: How to Find and Sign Documents for Signature

