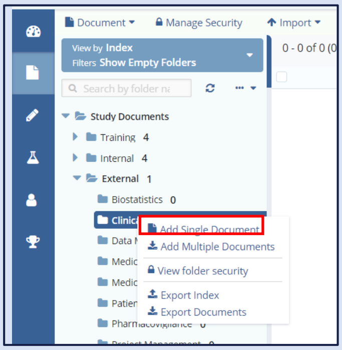
How to Initiate a Controlled Document Workflow TI v 10.2

APPLICABLE TO:

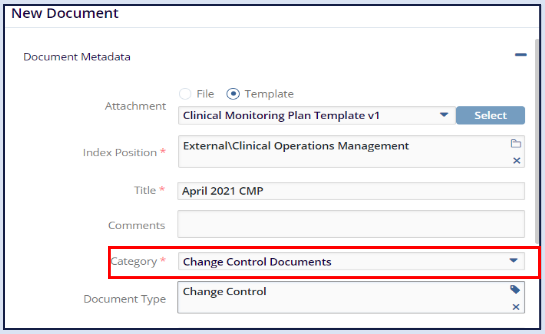
- ● Administrators
- ● Editors
- ○ Readers
- ○ eTMF
- ● Content Management
- ○ myTI

Note: Version 1 demonstrates how to initiate a Controlled Document Workflow to a newly added document.
See Page 3 for Version 2: Initiating Controlled Document Workflow to an existing document

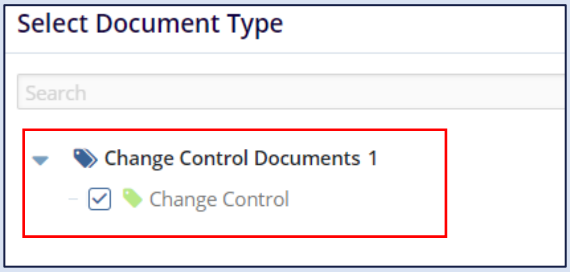
1. Login to a Collaborative Workspace room and navigate to the **Index View** of the **Documents** module.



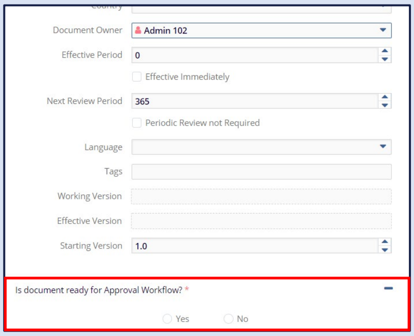
2. Right click on the desired folder in which to add a new **Change Controlled Document** and click **Add Single Document.**



3. Upload file or template and select **Change Control Documents** from the category option.



4. Select **Change Control Documents**, **Change Control** from the **Document Type** box, then click **Select.**



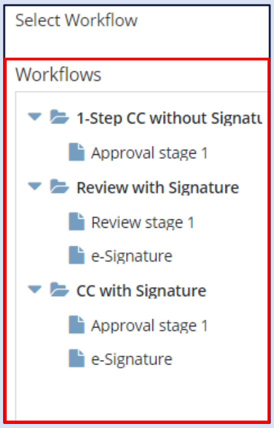
5. Fill out remaining fields such as **Document Owner**, **Effective Period**, **Next Review Period**, **Version,** etc.

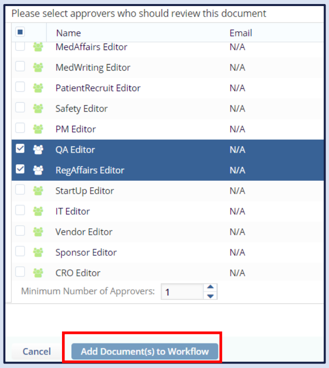
To initiate the **Approval Workflow**, click **Yes.**

Note: If the document is not ready for the approval workflow, click **No**.

Tip: To initiate a collaborative review see related job aid: **How to Initiate a Collaborative Review**.

6. Select the appropriate **workflow** by clicking the icon from the document grid, then choose the correct workflow from the options presented.



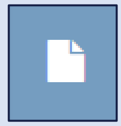


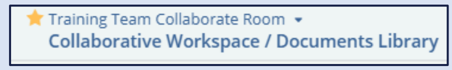
7. Select the appropriate **document approvers**, then click **Add Documents to Workflow.**

How to Initiate an Administrative Workflow TI v 10.2

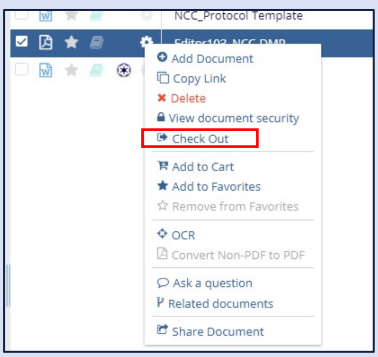
Note: Version 2
This job aid demonstrates how to initiate a controlled document workflow for an existing document.

1. Login to a Collaborative Workspace room and navigate to the **Documents** module.



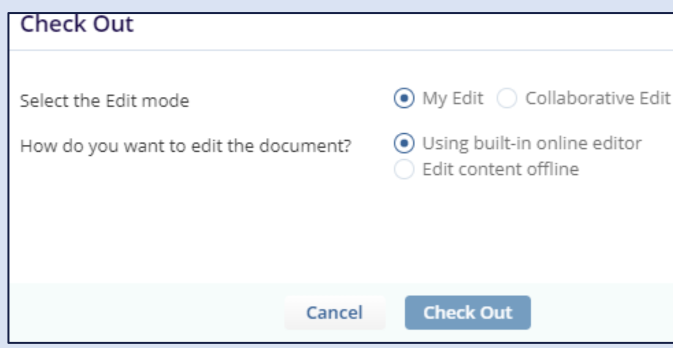


2. Locate the document in which you wish to make changes to

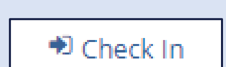


3. Right click the gear wheel and select **Check out** to begin making edits to the document.

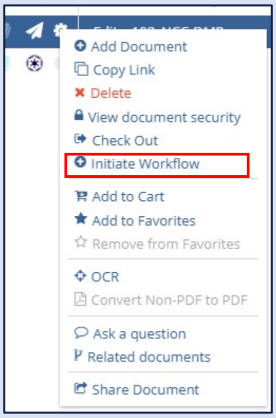
4. Choose your **edit mode** (My Edit, Team Edit) and how you wish to edit the document (online, offline)then click **Check out**

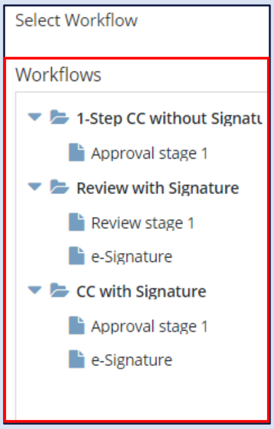


5. Make the necessary edits, then click **Check-in** when finished.

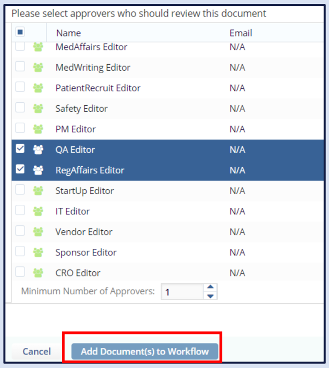


6. Return back to the Document Grid, and either click the icon, or click the gear wheel and choose **Initiate Workflow**





7. Select the appropriate **workflow** from the list of options presented, then choose the correct workflow from the options presented.



8. Select the appropriate **document approvers**, then click **Add Documents to Workflow.**

Tip: For help with the review/ approval process, see related Job Aid: **Locating a Document for Review/ Approval**