

APPLICABLE TO:

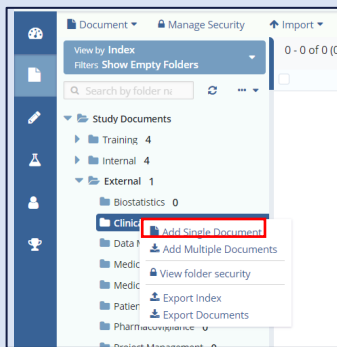
- Administrators
- Editors
- Readers

- eTMF
- Content Management
- myTI

Note: Version 1 demonstrates how to initiate a Controlled Document Workflow to a newly added document.

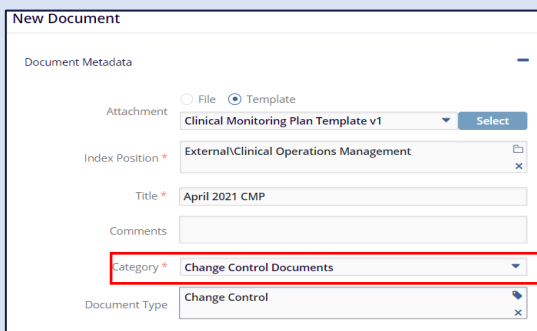
See Page 3 for Version 2: Initiating Controlled Document Workflow to an existing document

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

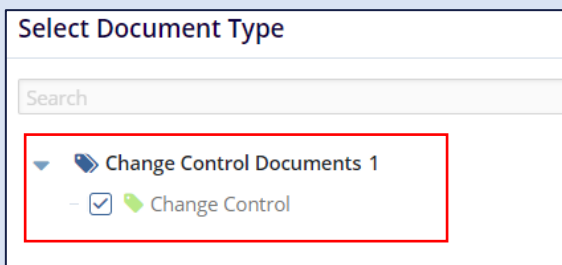


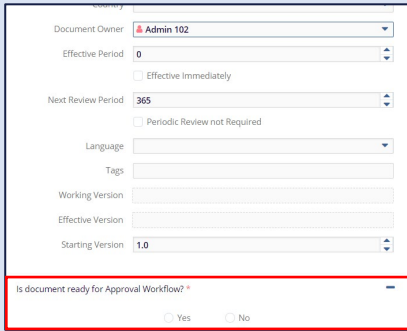
2. Right click on the desired folder in which to add a new **Change Controlled Document** and click **Add Single Document**.

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**.





Document Owner: Admin 102

Effective Period: 0

Next Review Period: 365

Language: [dropdown]

Tags: [input]

Working Version: [input]

Effective Version: [input]

Starting Version: 1.0


is document ready for Approval Workflow?  Yes  No

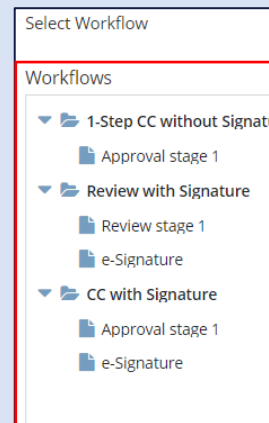
5. Fill out remaining fields such as **Document Owner, Effective Period, Next Review Period, Version, etc.**

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**.

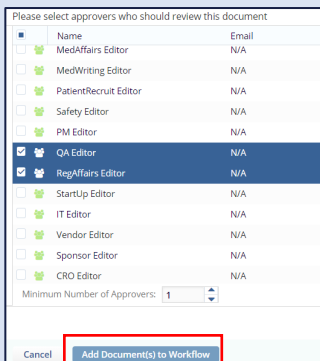
6. Select the appropriate **workflow** by clicking the  icon from the document grid, then choose the correct workflow from the options presented.



Select Workflow

Workflows

- 1-Step CC without Signatu
  - Approval stage 1
- Review with Signature
  - Review stage 1
  - e-Signature
- CC with Signature
  - Approval stage 1
  - e-Signature



Please select approvers who should review this document

Name	Email
<input type="checkbox"/> MedAffairs Editor	N/A
<input type="checkbox"/> MedWriting Editor	N/A
<input type="checkbox"/> PatientRecruit Editor	N/A
<input type="checkbox"/> Safety Editor	N/A
<input type="checkbox"/> PM Editor	N/A
<input checked="" type="checkbox"/> QA Editor	N/A
<input checked="" type="checkbox"/> RegAffairs Editor	N/A
<input type="checkbox"/> StartUp Editor	N/A
<input type="checkbox"/> IT Editor	N/A
<input type="checkbox"/> Vendor Editor	N/A
<input type="checkbox"/> Sponsor Editor	N/A
<input type="checkbox"/> CRO Editor	N/A

Minimum Number of Approvers: 1

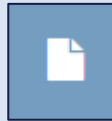
Cancel Add Document(s) to Workflow

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

Note: Version 2

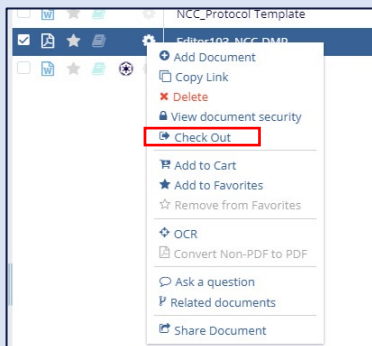
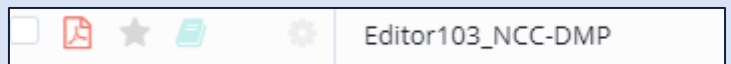
This job aid demonstrates how to initiate a controlled document workflow for an existing document.

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

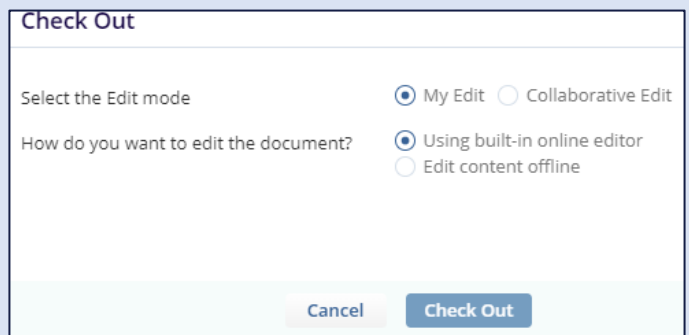


★ Training Team Collaborate Room ▾  
Collaborative Workspace / Documents Library

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

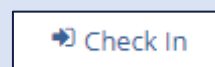



3. Right click the gear wheel and select **Check out** to begin making edits to the document.

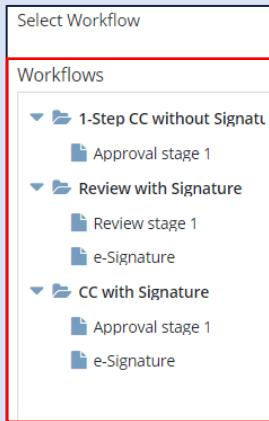
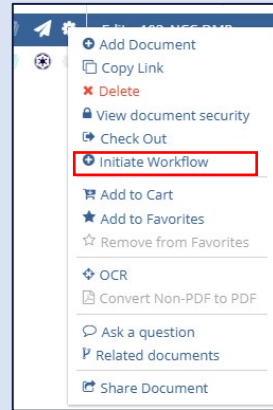


4. Choose your **edit mode** (My Edit, Team Edit) and how you wish to edit the document (online, offline) then click **Check out**

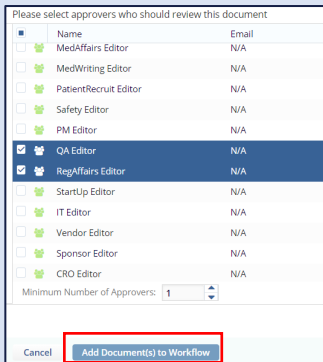
5. Make the necessary edits, then click **Check-in** when finished.



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**