

APPLICABLE TO:

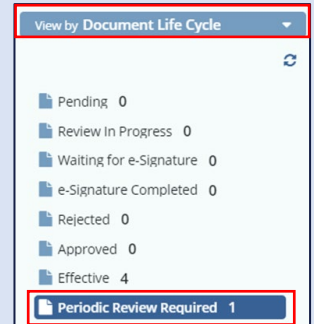
- Administrators
- Editors
- Readers

- eTMF
- Content Management
- myTI

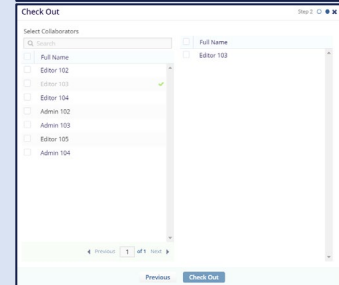
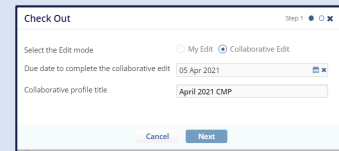
1. Login to the Collaborative Workspace and navigate to the **Documents Module**



2. Select **Document Life Cycle** from the **view by** drop-down in order to see documents that require a Periodic Review. Click on the **Periodic Review Required** folder.

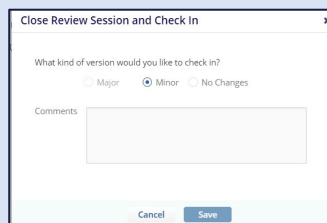
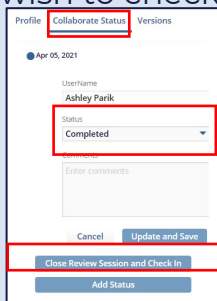


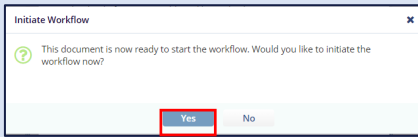
3. Right click the **gear wheel** in the grid view, and select **check-out** to begin the review process of the document. Set the collaborative edit due date, add document editors, then click **check-out**.



4. Make any necessary edits, then change the status to **Completed** by clicking on the **status** drop-down under the **Collaborate Status** tab in the metadata pane.

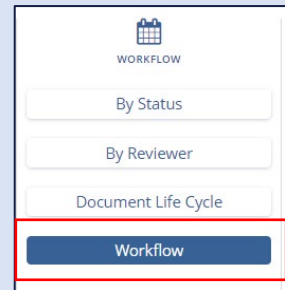
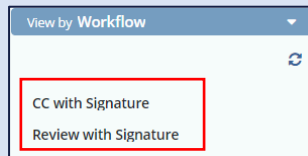
5. To close the review session, click **Close Review Session and Check-in** button at the bottom. Indicate the kind of version you wish to check in, and click **Save**.



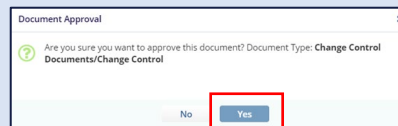
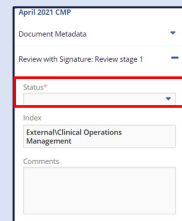


6. Click **Yes** to initiate the document workflow.

7. Select **Workflow** from the document view drop-down and select the appropriate review folder to begin the workflow review process

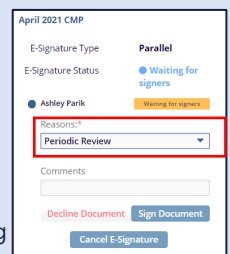


8. Click **claim** from the top within the metadata pane and select the appropriate status from the **Status** dropdown menu. Enter comments if necessary, then click **Save**, then **Yes**.



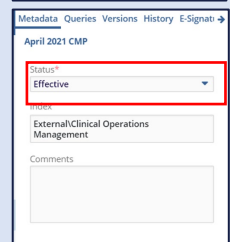
9. If the document requires an e-Signature as part of the workflow process, change the view to **Document Life Cycle**, then select the document from the **Waiting for e-Signature** folder.

10. Claim the document from the top of the metadata pane then click **Create e-Signature Request**, under the **E-Signature** tab within the metadata pane. Choose the document signer, then click **Release** to release the document.



Note: The document signer will select **Periodic Review** from the list of reasons when completing the e-Signature.

11. **Claim** the document from the **e-Signature Completed** folder to change the final status of the document to **Effective**.



Note: the document can be made effective immediately, or a designated date can be set for effective status.

The document will move into the approved folder until the designated effective date