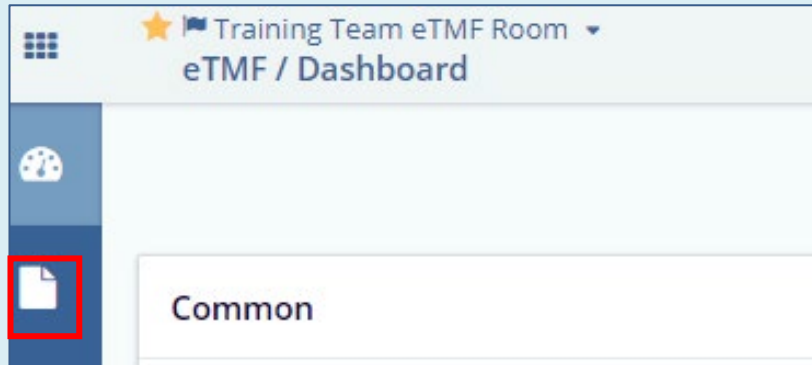


APPLICABLE TO:

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

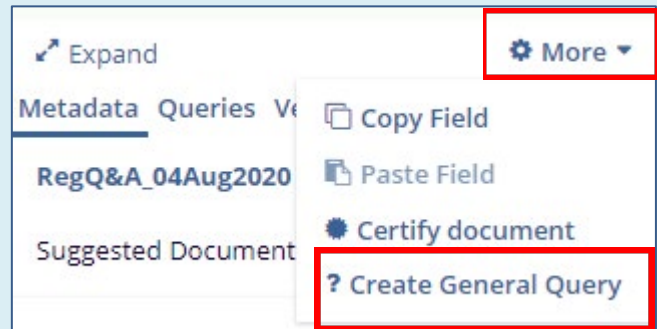
1. Log into the room and navigate to the Documents Module.



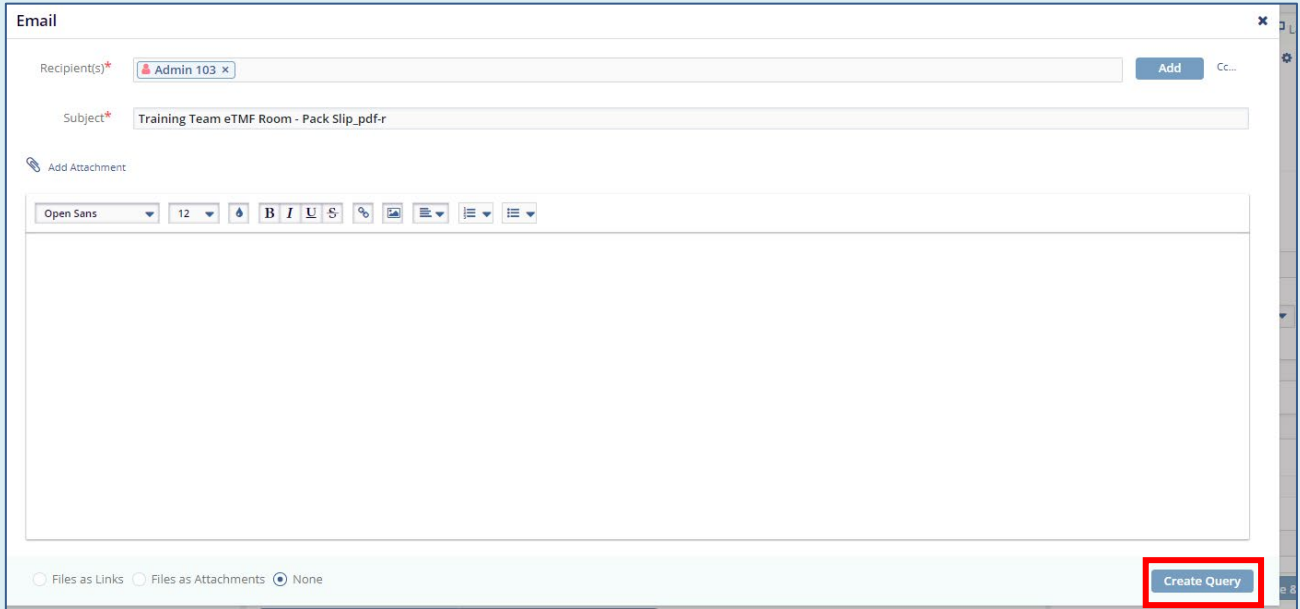
2. In the Index Pane, drill down using the folders to find a document.



3. Select the document, then click on the **More** button at the top right corner of the metadata pane and select **“Create General Query”**



4. Select your recipients, type your query in the email box, select how the user should receive the related document, and then click **Create Query** to send.



The screenshot shows an 'Email' form with the following elements:

- Recipient(s)*:** A dropdown menu showing 'Admin 103' with a close button (x).
- Subject*:** A text field containing 'Training Team eTMF Room - Pack Slip_pdf-r'.
- Add Attachment:** A link to add attachments.
- Rich Text Editor:** A toolbar with options for font (Open Sans), size (12), bold (B), italic (I), underline (U), strikethrough (ABC), link, unlink, list, and indent.
- File Delivery Options:** Radio buttons for 'Files as Links', 'Files as Attachments', and 'None' (selected).
- Create Query:** A button highlighted with a red box at the bottom right.

Please see the related job aids “How to Create a Workflow Query” and “How to Create an Audit Query” for additional information on creating a query in Trial Interactive