

How to Create a General Query

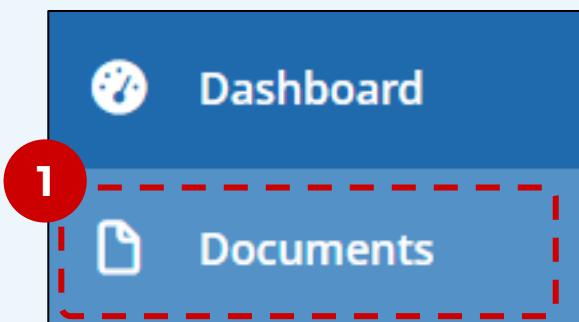
TI version 10.8

APPLICABLE TO:

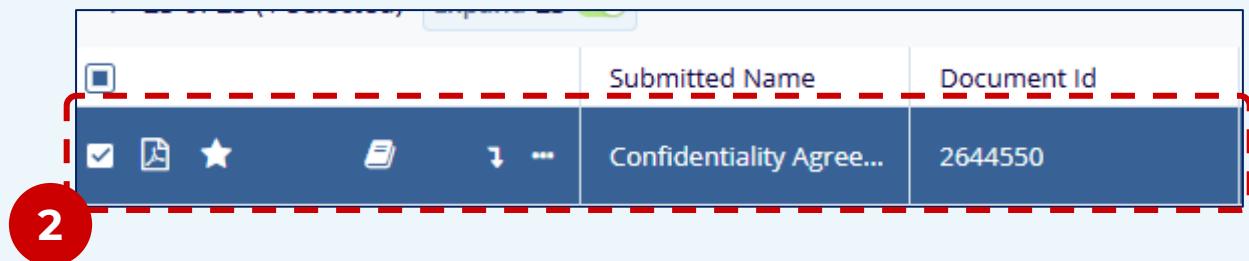
- Admin
- Manager
- Editor
- Reader

- eTMF
- Collaborate
- eISF

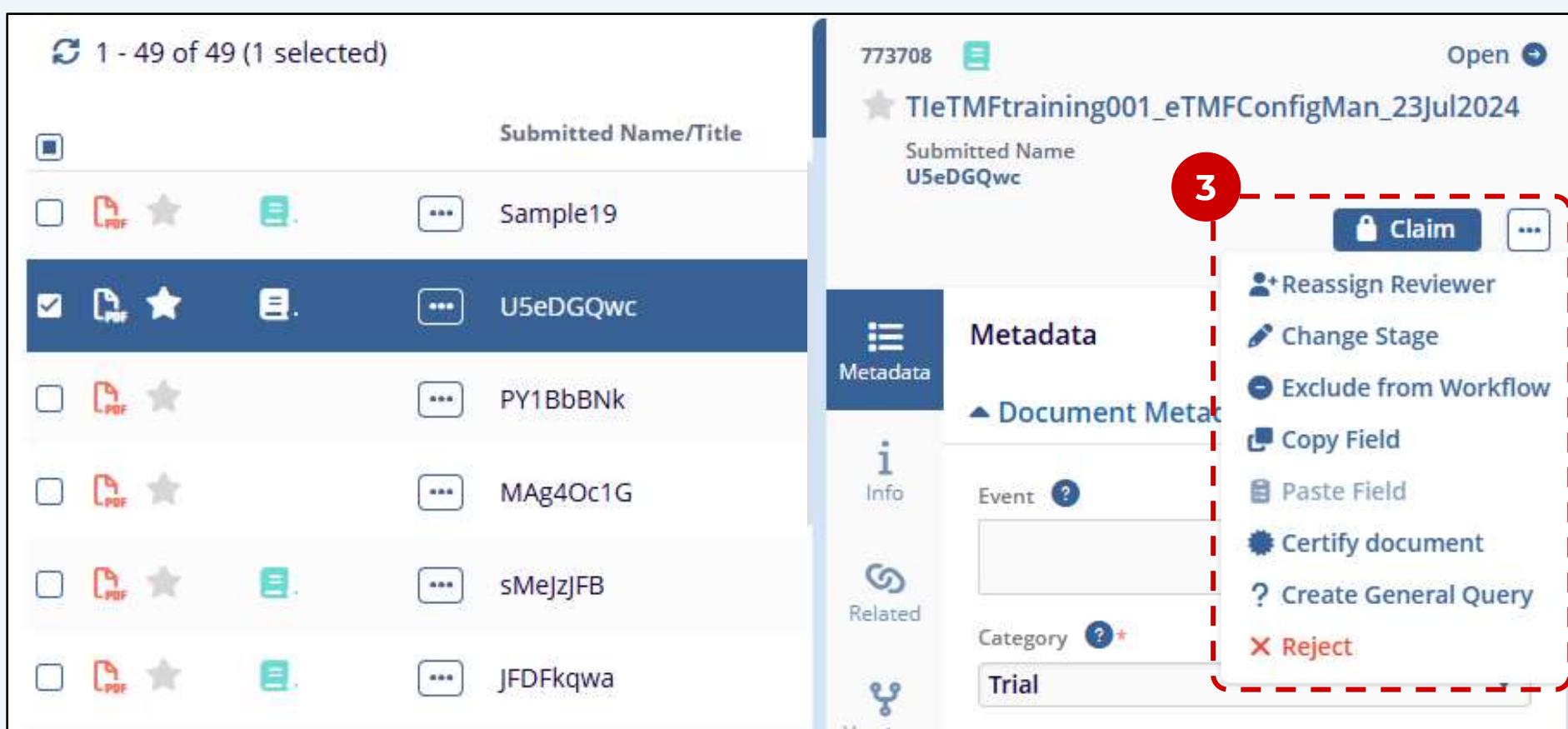
- 1 Log into a room and navigate to the **Documents Module**.



- 2 Locate the document or placeholder that you wish to create a general query on.

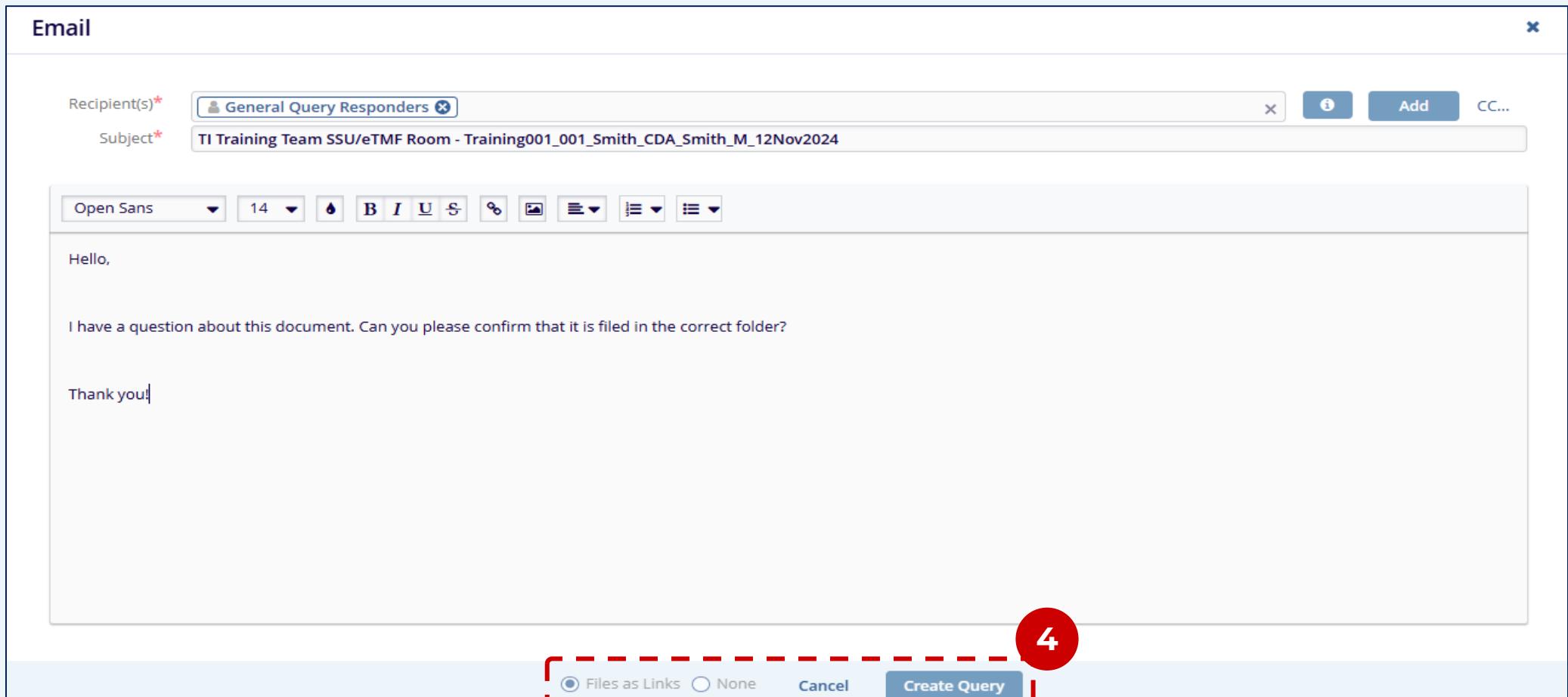


- 3 Select the document or placeholder, then click on the **More** button (3 dots) at the top-right corner of the metadata pane. Select **“Create General Query.”**



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4 Treat the query creation box as a standard email. Add or remove intended recipients (one will be selected by default), optionally change the subject line, then type your query in the text box below.



Use the radio buttons (some users may be unable to use it) at the bottom to select how the query responder should receive a copy of the queried document –as attachment, link, or not at all-, and then click **Create Query** to send your message.

Note: General queries can also be created for documents displayed in dashlets, and in the CRA Reconciliation and Queries modules.

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.