How to Use Read & Acknowledge

TI version 10.8

TRIAL INTERACTIVE

APPLICABLE TO:

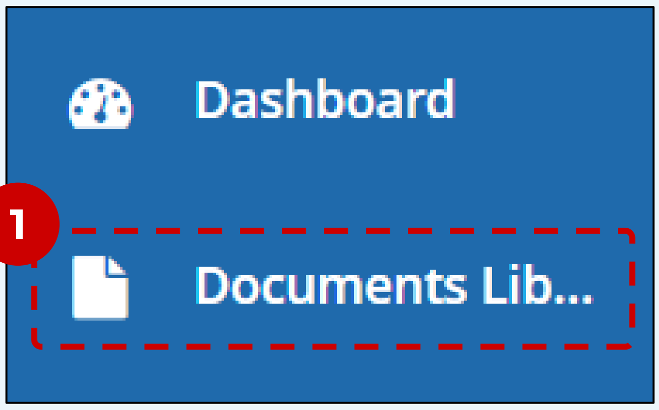
- ● Admin
- ● Manager
- ● Editor
- ○ Reader

- ● Collaborate
- ● eISF

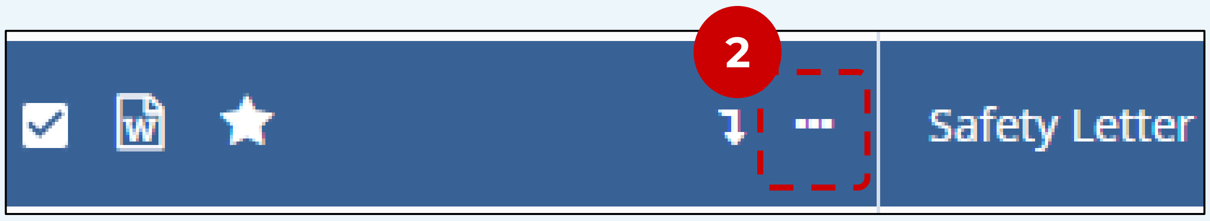
TI Rooms built around the Collaborate product – which include eISF and QDMS rooms among others – support an optional feature to send documents while requesting an acknowledgement, especially useful for key information that sites need to read, like Safety Letters, for example. To set the feature up in an existing room, contact your assigned CSM or Trial Interactive representative.

Part 1: Requesting a Read & Acknowledge

1 **Navigate** to the Documents Library.

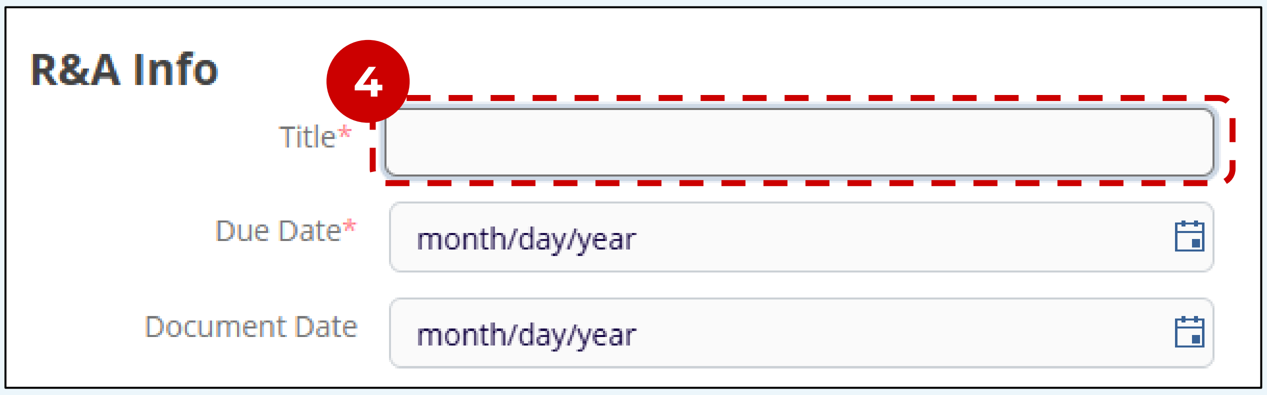


2 Pick a document. **Right-click** on the document line, or click on the **ellipsis**, to open the Document Actions menu.

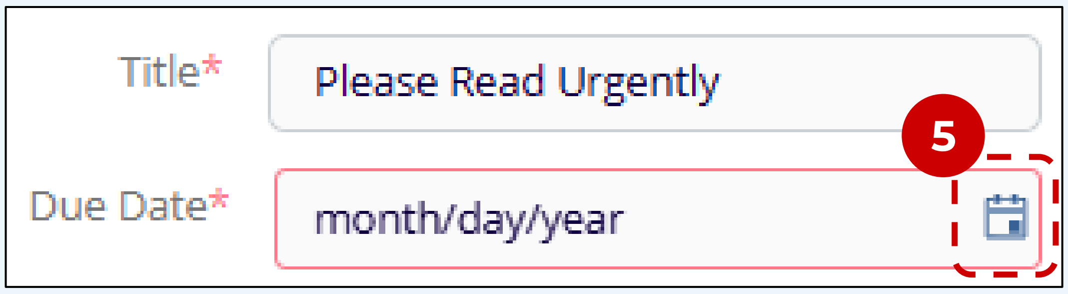


3 Click **Send for Read & Acknowledge**. A new window opens.

4 The Read & Acknowledge request will be sent as an email. Insert a **Title**.



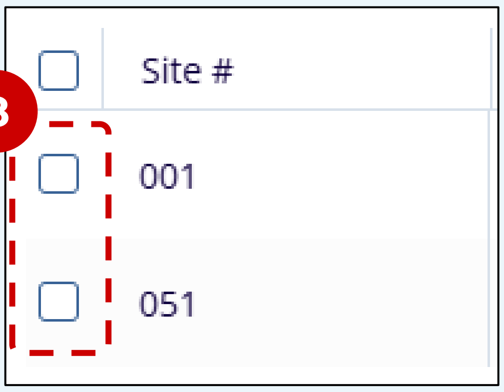
5 Use the **Calendar** button to set a limit date for the acknowledgement.



6 Fill the other non-required fields.

7 [Optionally] Click on **Select Sites**. This allows to pre-select recipients based on their site role.

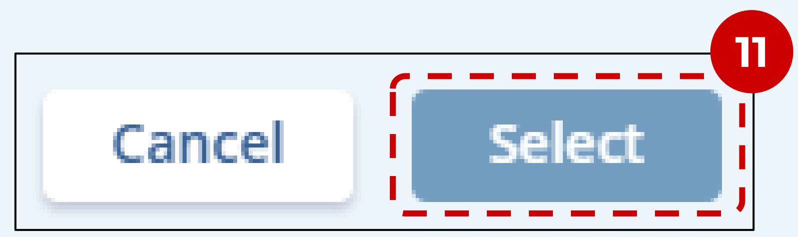
8 Select one or more sites using the checkboxes.



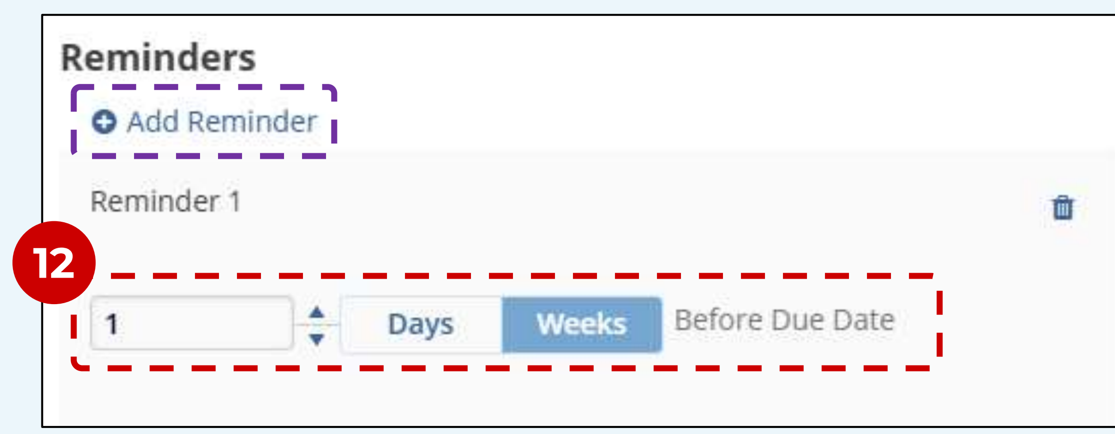
9 Only contacts that are assigned to R&A are selectable. In case of a site not having such a contact, you will be alerted; click on **Go To Contacts**. This opens in a new tab.

10 Select a contact to see their details in the side panel.
Enable any contact for R&A by checking **Contact is responsible for Read & Acknowledge Documents**, and Save the change**.**

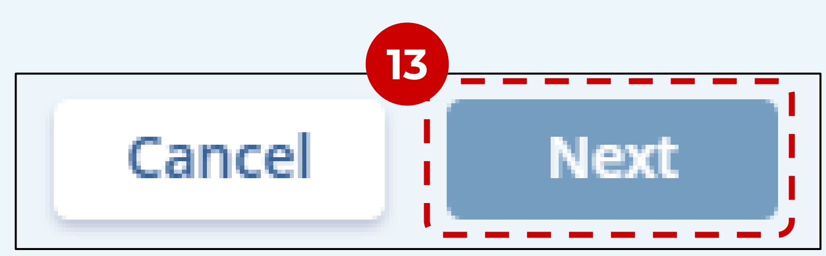
11 Return to the previous tab (displaying R&A setup). Confirm your site selection and click **Select**.



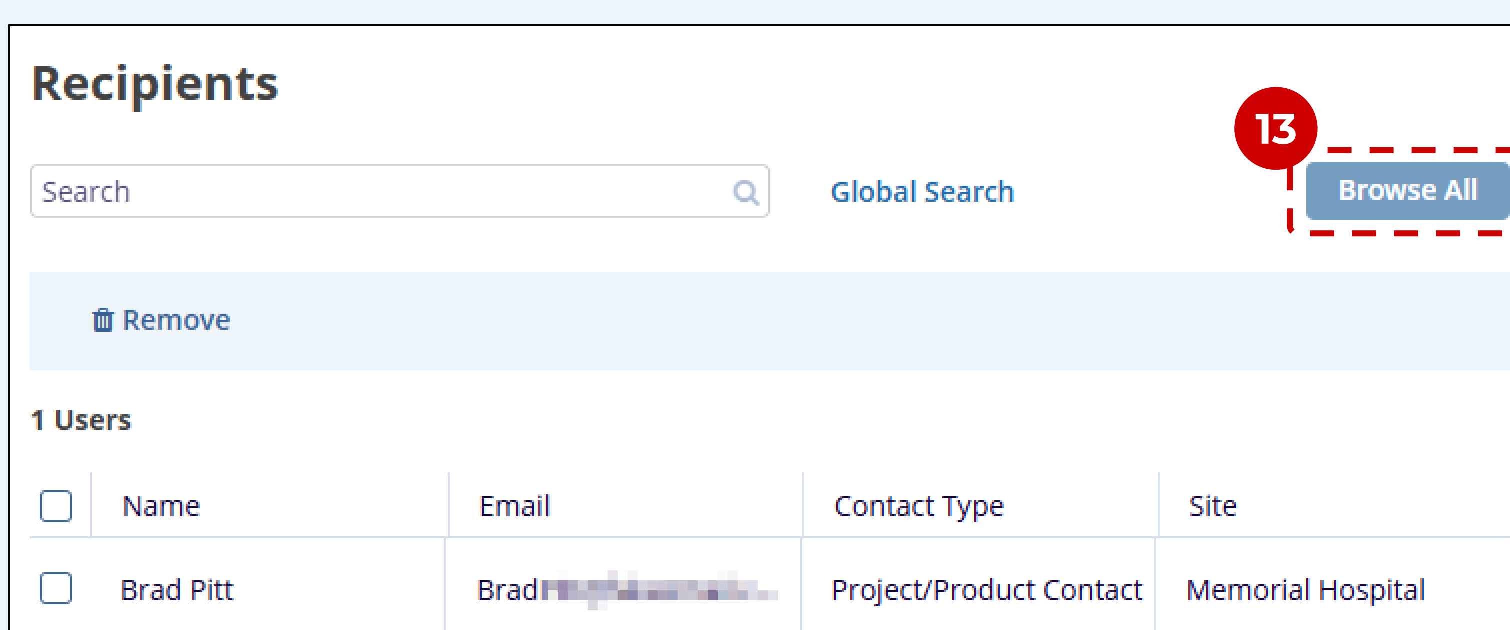
12 [Optionally] Set reminders that will be mailed to recipients.



13 Move to the **Next** page.



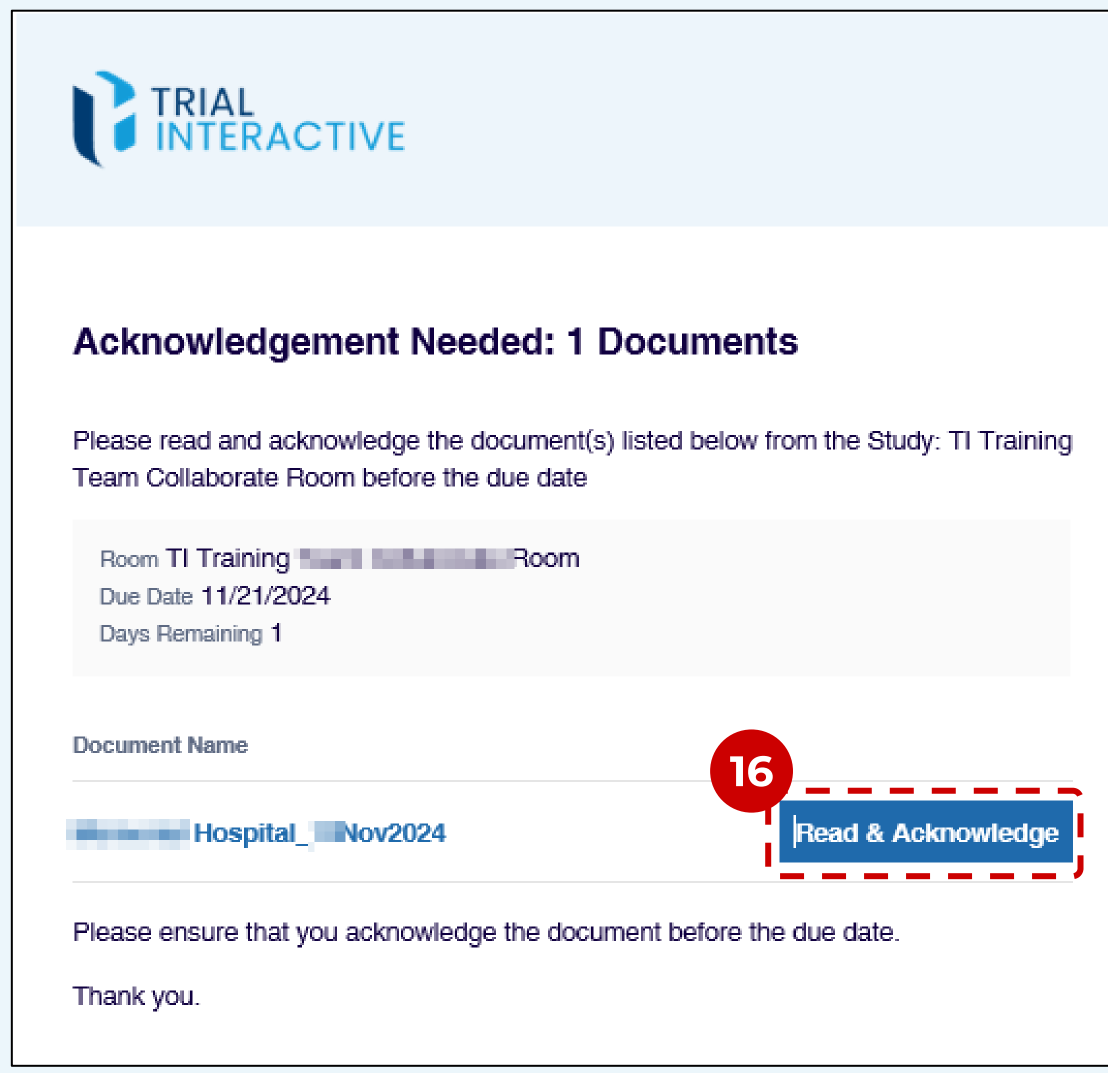
14 Contacts selected via Sites will show here. Add recipients with search or **Browse All** if required.



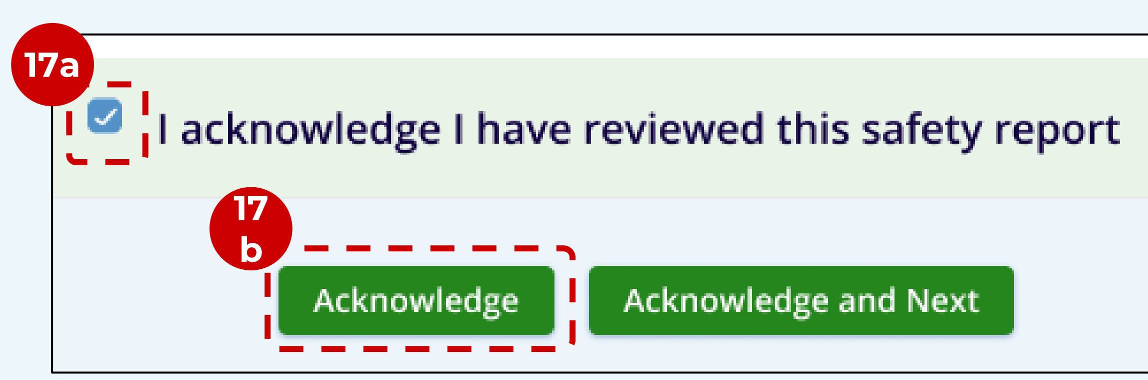
15 Click Send to email the R&A request to recipients.

Part 2: Responding to an R&A Request

16 Recipients will get an email requesting acknowledgement. Click on **Read & Acknowledge** to proceed.



17 The Document Viewer will open in your browser. Read the document carefully, then **check the box** for acknowledgement, and click **Acknowledge** to finish.



Registered users can track their R&A requests in the Documents module, using the **My R&As Received** view.