How to Set Document Auto-Claim in a Workflow

TI version 10.8

TRIAL INTERACTIVE

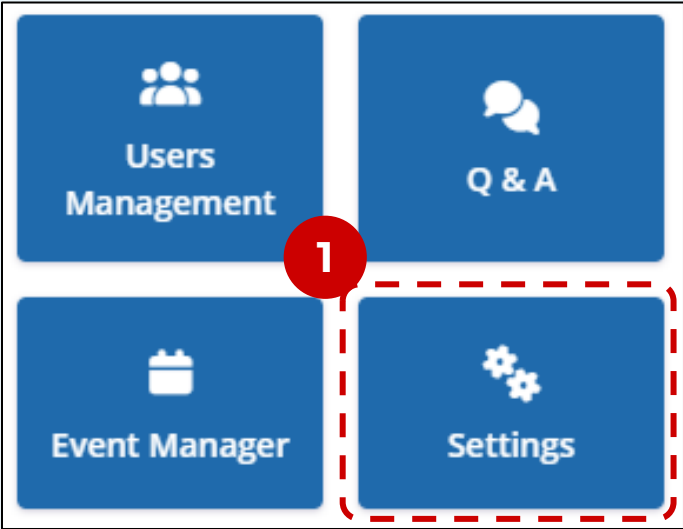## APPLICABLE TO:

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

● eTMF

Auto-claim enables documents that enter a workflow to be automatically assigned to a reviewer, according to setting chosen by the Room Administrator.

1 Enter a room and click on the **Settings** module located within the Navigation Grid.

Users Management | Q & A
Event Manager | Settings

2 Navigate to **Workflows** and expand the folder by clicking on the downward pointing arrow. Select **Common Settings**.

▶ Reports
▼ Workflows
　　Common Settings
　　Workflows
　　Review Status
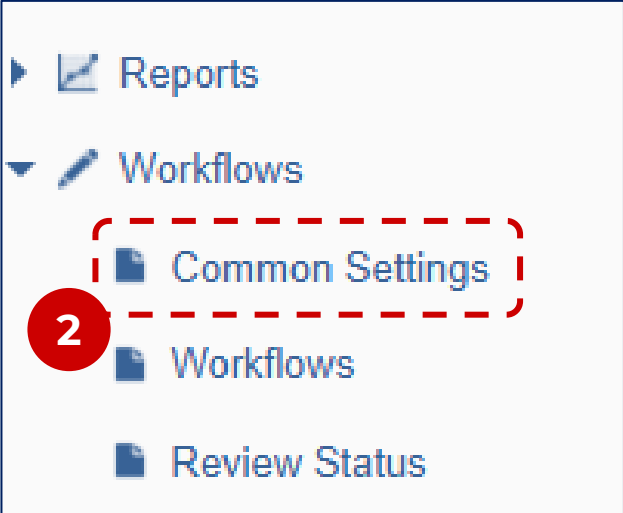
3 In the Auto-Claim Configuration section at the bottom of the page, tick the box for **Allow workflow stage Auto-Claim** to enable this feature.

Auto-Claim configuration

Allow workflow stage Auto-Claim: ☑ If enabled, Documents will be auto-claimed if they meet auto-claim conditions

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4 Set the **Auto-claim lead time**.

This sets the number of days after submission that a document is auto-claimed. Documents manually claimed before the set time will not be affected.

Auto-Claim configuration

Allow workflow stage Auto-Claim: ☑ If enabled, Documents will be auto-claimed if they meet auto-claim conditions **4**

Auto-claim lead time (days): `1`

Upon auto-claim activation, the system will distribute documents among all available reviewers. If a specific workflow only has one reviewer assigned, all eligible documents will be assigned to that user.

If a document is going through a multi-step workflow, a different reviewer needs to be assigned at each step. Documents will not be auto-assigned to a reviewer that is present in more than one stage of the workflow.