Workflow: How to Monitor the QC Workflow

TI version 10.8

TRIAL INTERACTIVE

APPLICABLE TO:

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

- ● **eTMF**
- ○ **Collaborate**

Dashlets are probably the most convenient way to monitor workflow activity . We propose a selection of dashlets that you might want to consider using for this, along with where to find them (by default location).

*In the **eTMF** group*

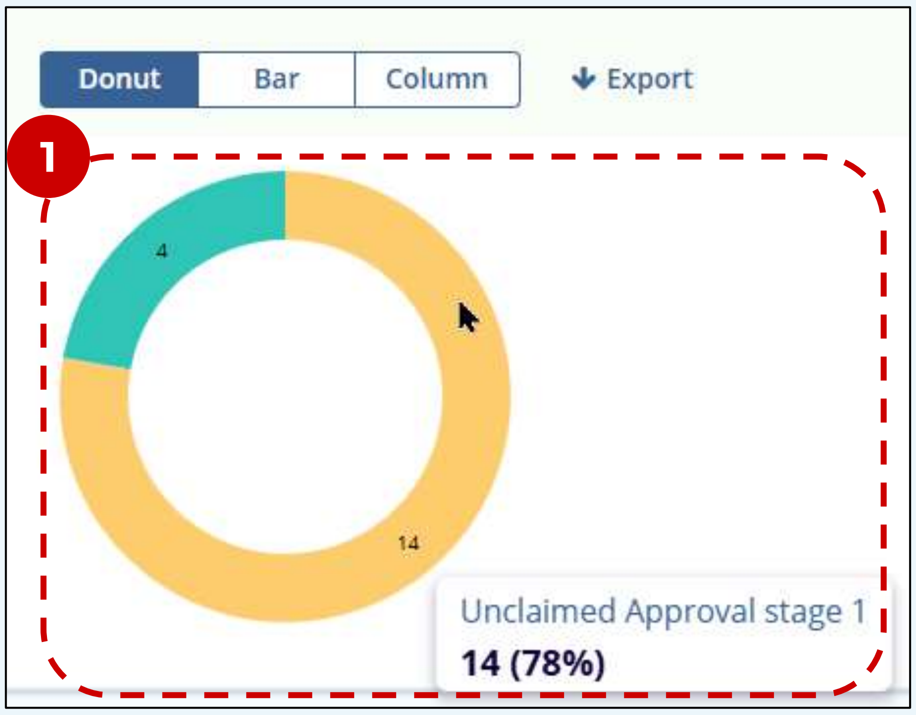
- Claimed & Unclaimed
- Rejected and In-Clarification Documents
- Open Queries By Age

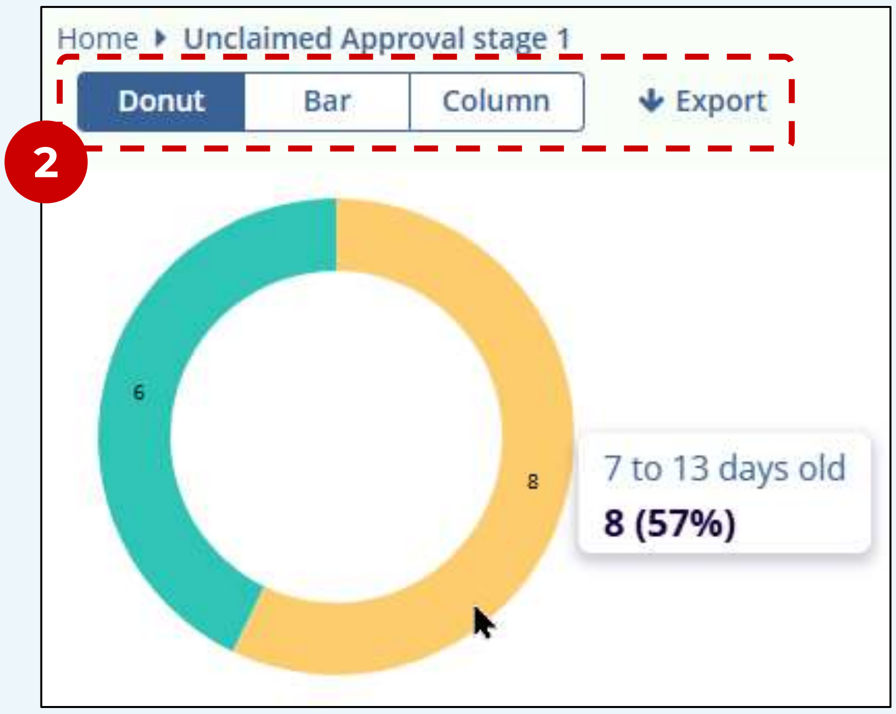
*In the **Documents** group*

- By Workflow Status

1 The **Claimed & Unclaimed** Documents dashlet provides a count of all documents that are in a workflow and are either claimed, unclaimed, or in progress. It also provides insight on the timeliness of processing.

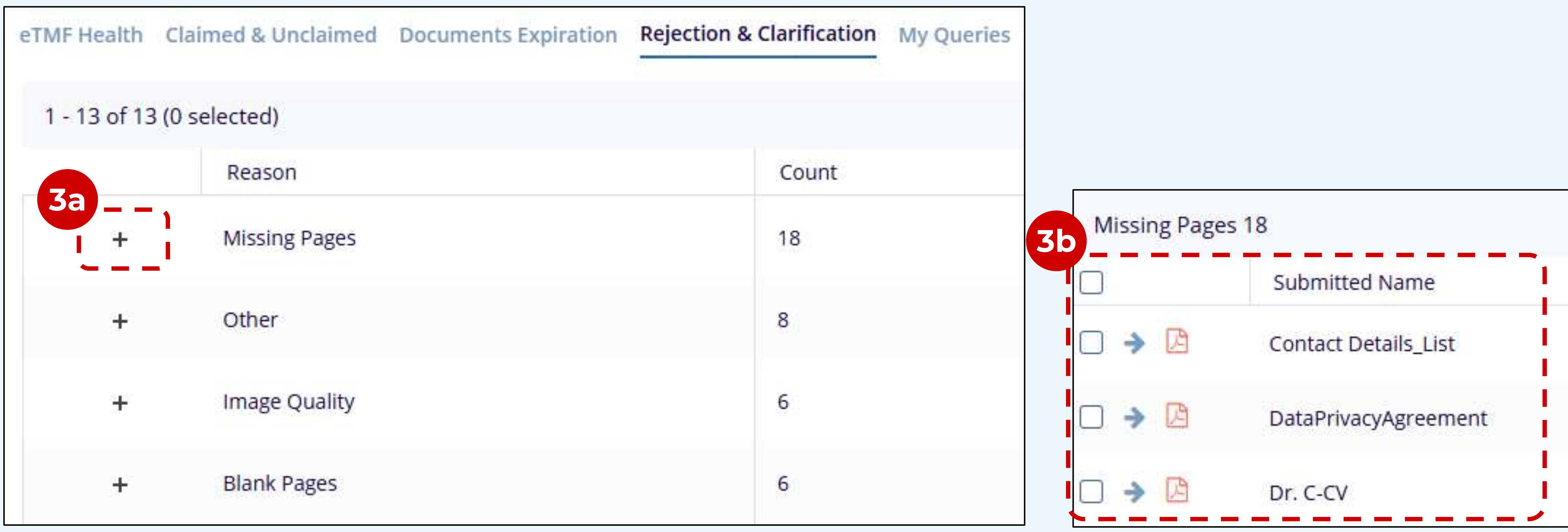
Users can click on each slice of the interactive chart to obtain detailed information about each status. Refer to screenshots below:



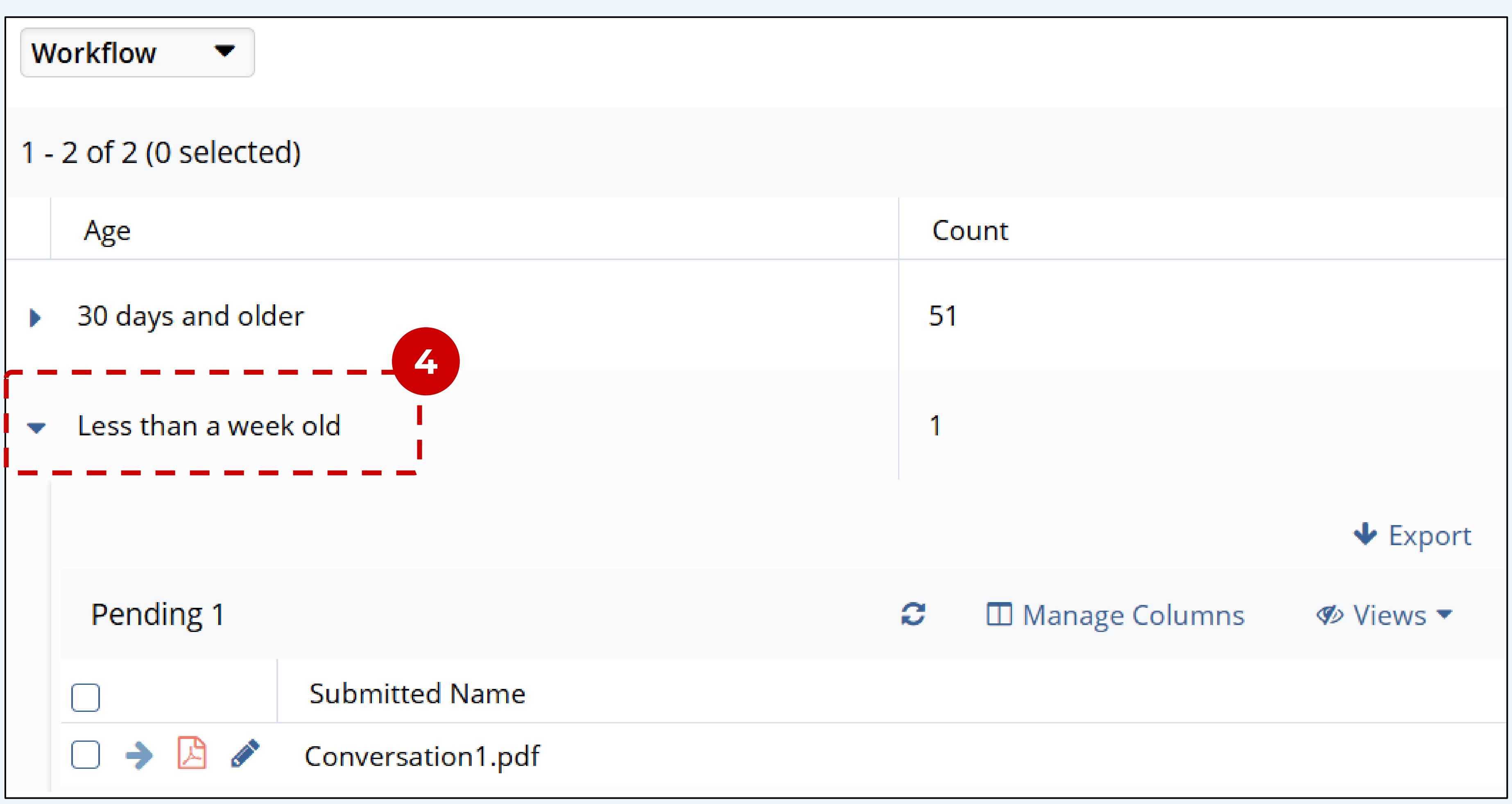


2 Chart and graph dashlets can be visualized as different types of charts, and the charts can be **Export**ed as images to various locations.

3 The **Rejected and In-Clarification Documents** dashlet offers a tally of documents that were rejected or needed clarification within the workflow. The reasons for this are displayed with a counter, and a list of affected documents can be also displayed, so that bottlenecks and other issues can be identified quickly and addresssed by your team.



4 While queries are not always related to workflow, the **Open Queries by Age** dashlet offers the ability to identify queries to be prioritized for quick resolution, which has a large impact on completing QC reviews on time. Each section can be expanded by clicking on its title .



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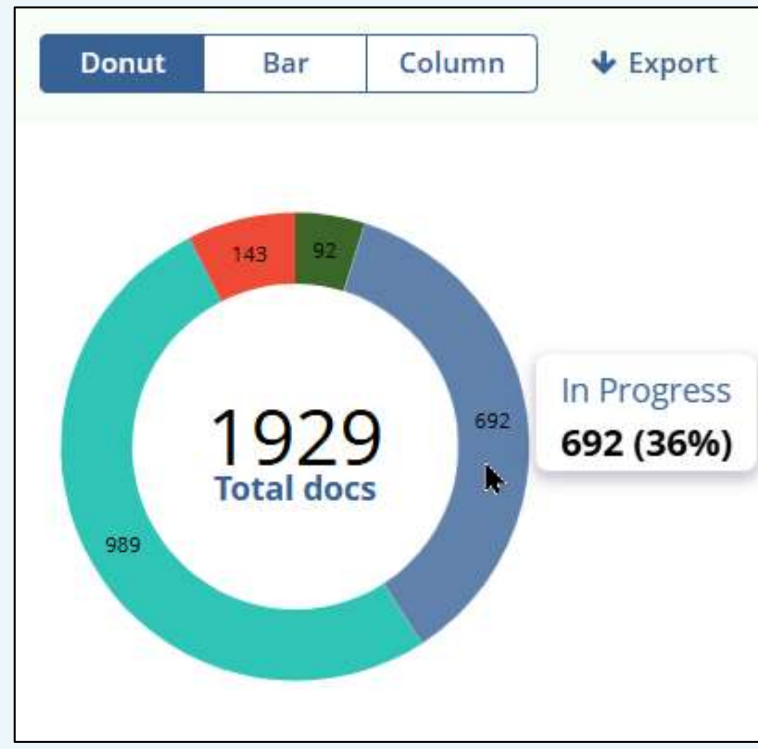
5 The **By Workflow Status** Documents dashlet will display a breakdown of statuses in the form of a graph. The slices on the graph are not interactable, so this one serves mainly an oversight purpose.



Users can also leverage the Documents Module to monitor progress of individual documents through the workflow.
This can be done using the Views listed under the Workflow group.

6 The **Workflow** view will display a breakdown of the existing workflows and their stages. This is mostly helpful to understand the existing workload.

7 **By Status** and **By Reviewer** will make for a more granular view of where documents sit within a workflow at present time.