

Workflow: How to Resolve a Document Query

TI version 10.8

APPLICABLE TO:

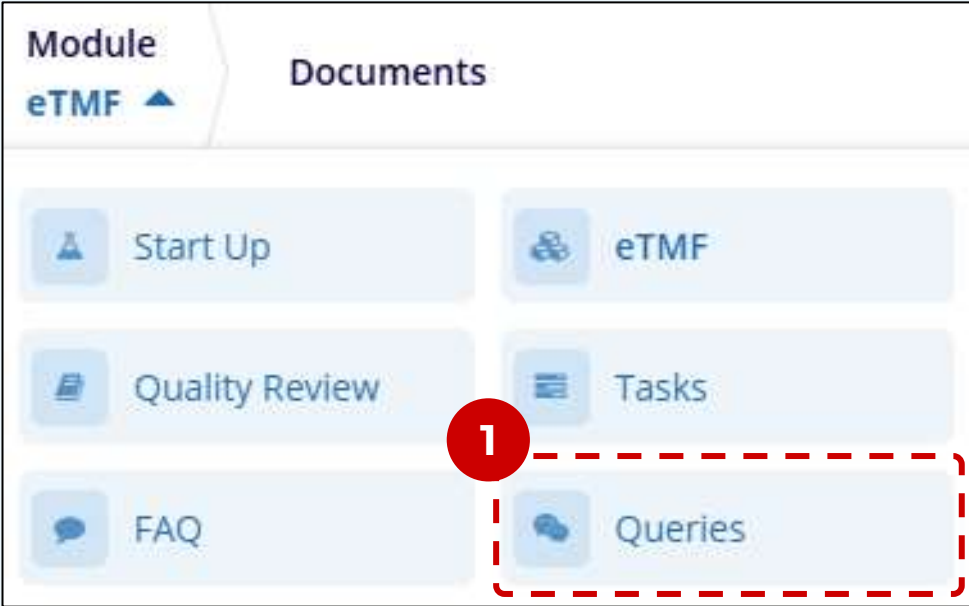
- ☒ Admin
- ☒ Manager
- ☒ Editor
- ☐ Reader
- ☒ eTMF
- ☐ Collaborate

Users who receive Query messages from Trial Interactive can respond via email, as well as via TI, to supply required information and/or new versions of documents. This Job Aid addresses how to respond to a Workflow Query via the TI user interface.

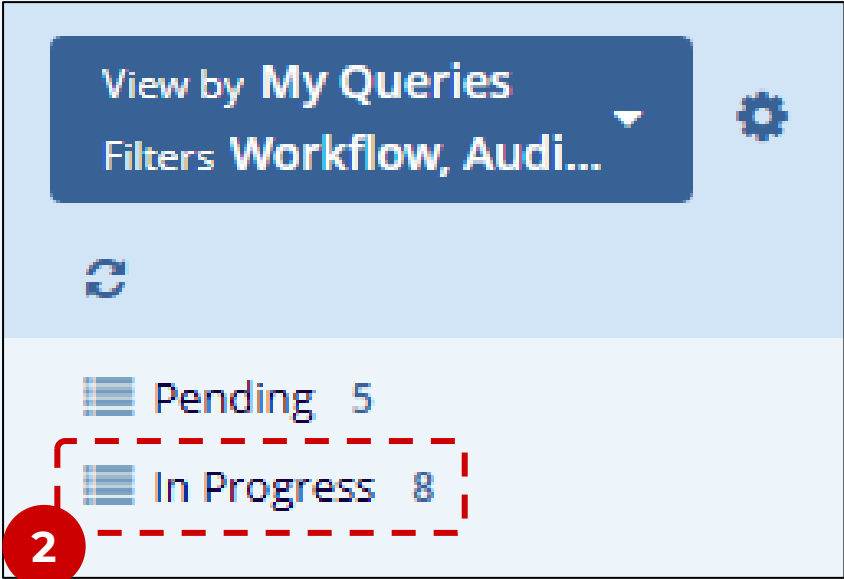


When responding via email instead, it is important to avoid changing the Subject of the email; this guarantees the reply will be captured by TI within its correct unique Query thread.

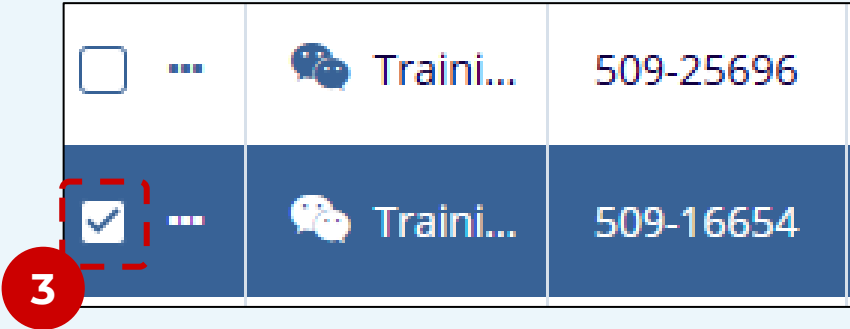
1 Access the **Queries** module.



2 Select the **In Progress** folder.
This includes only queries that have received a reply.



3 **Select** any query and expand the Metadata Panel if not already visible.

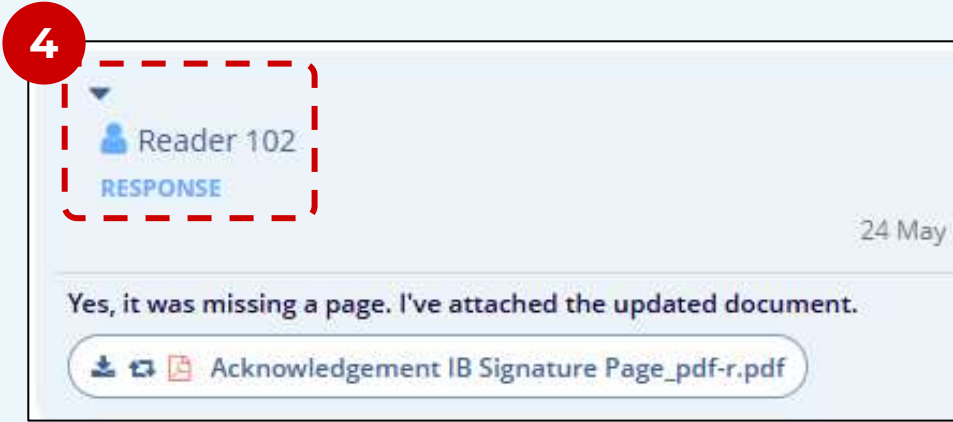


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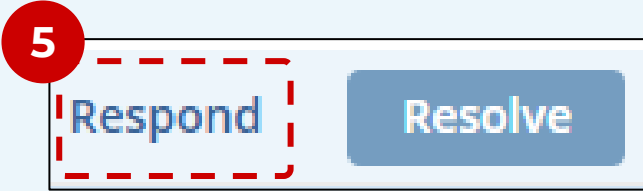
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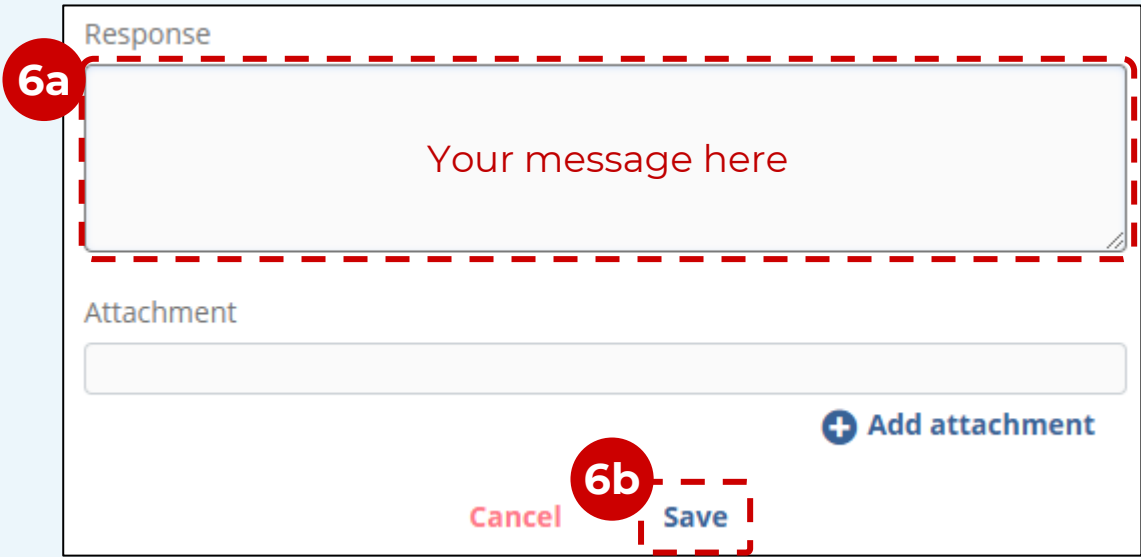
4 Locate and expand the **Response** panel.



5 Based on the response, determine if you wish to Resolve the query (go to step #8), or send further requests via **Respond**.



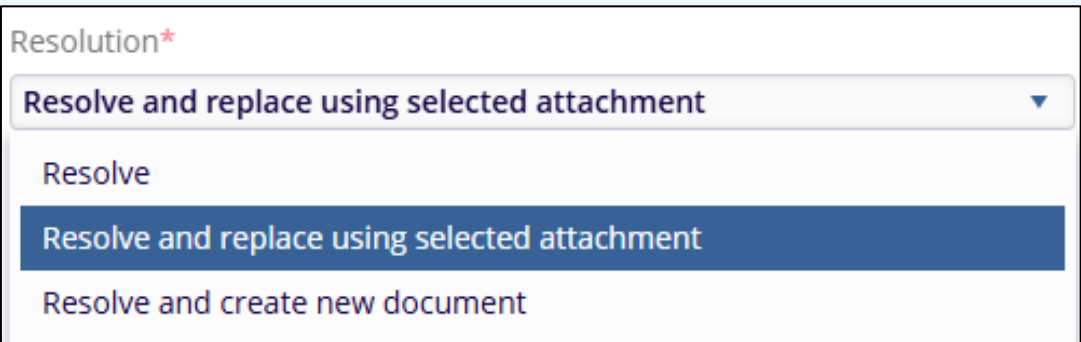
6 If you choose to respond, **write** your message in the blank field, then click **Save**.
You can optionally add documents via Add Attachment.



7 After sending your response, change the query status: click **Back To Pending**.



8 If you choose Resolve, a new window opens with up to three resolution methods available.



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9 Using the simple **Resolve** option, the query is closed and the document and workflow are left unaltered.

Resolution*

Resolve

Comments *

☐ Use selected attachment

☐ Copy metadata from original document

10 Using **Resolve and replace using selected attachment** will display (one of) the attachments in the larger panel. You can select different attachments and compare before deciding which will replace the current document content.

Please select attachments

☒ Dr_x2E_ B-CV.PDF

From Editor 102 17 May 2021 14:40:38 EDT

ti_editor102@ti.com

☐ Acknowledgement IB Signature Page_pdf-r.pdf

From Reader 102 24 May 2021 14:38:36 EDT

TIReader102@ti.com

11 The **Resolve and create document** option implies the current document will be discontinued (rejected or deleted).

☐ Use selected attachment

☐ Copy metadata from original document

You can choose from support options to automatically place a new document with the selected attachment in the eTMF, and inherit the metadata from the current document.

12 All resolution methods require you to add **Comments** before you can finalize.

Comments *

This query resolved by reception of a corrected document

13 Click the **Resolve** button to confirm your choices and close the query.

Cancel

Resolve

14 If using options in steps 10 and 11, the user should follow up by accessing the document under review, and completing the workflow **status** assignment there.

▲ 1-Step Workflow: Approval stage 1

Status*

Clarification

Under Review

Rejected

Clarification

Approved

Submission

Comments

Missing signature