

APPLICABLE TO:

☒ Admin

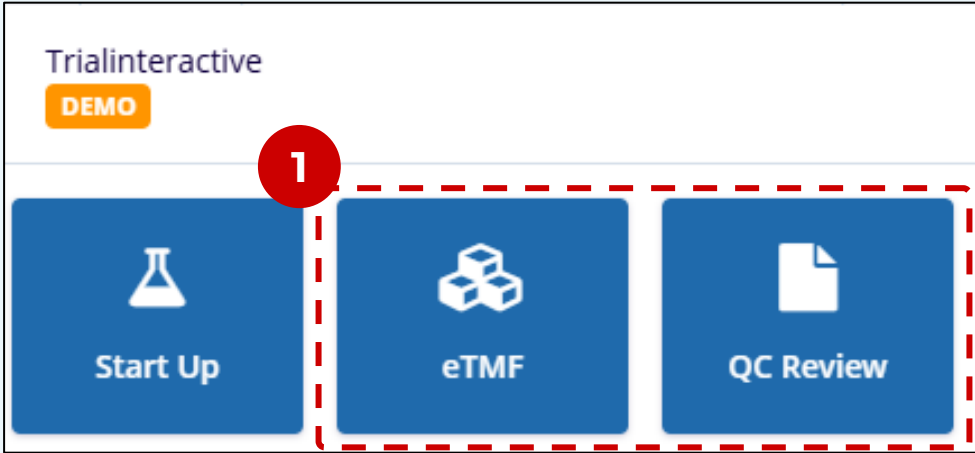
☒ Manager

☒ Editor

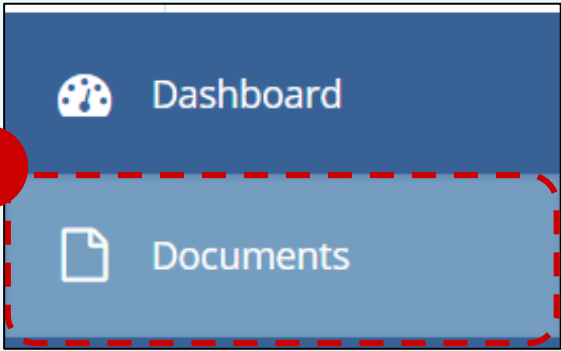
☐ Reader

☒ eTMF

1 Navigate to **eTMF** or **QC Review**.



2 Navigate to the **Documents** page.



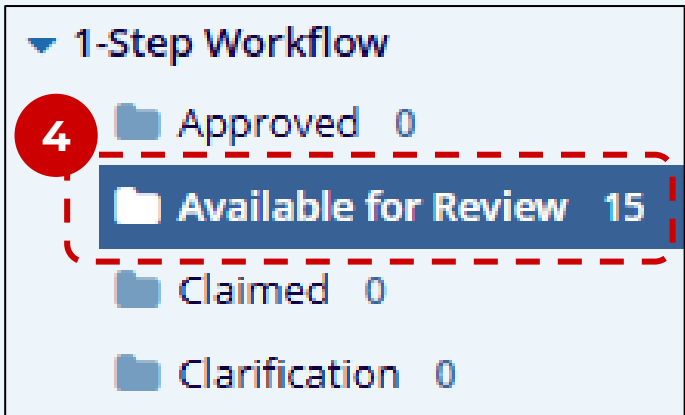
3 Select a workflow view. We recommend **My Workflow Assignments**.



This step is not required in the **QC Review** Module as it offers only one possible view.



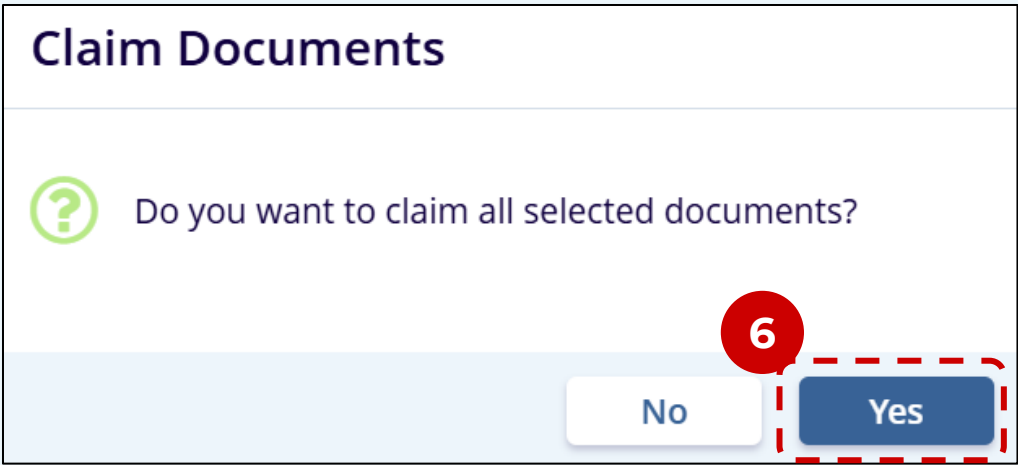
4 Select the **Available for Review** folder.



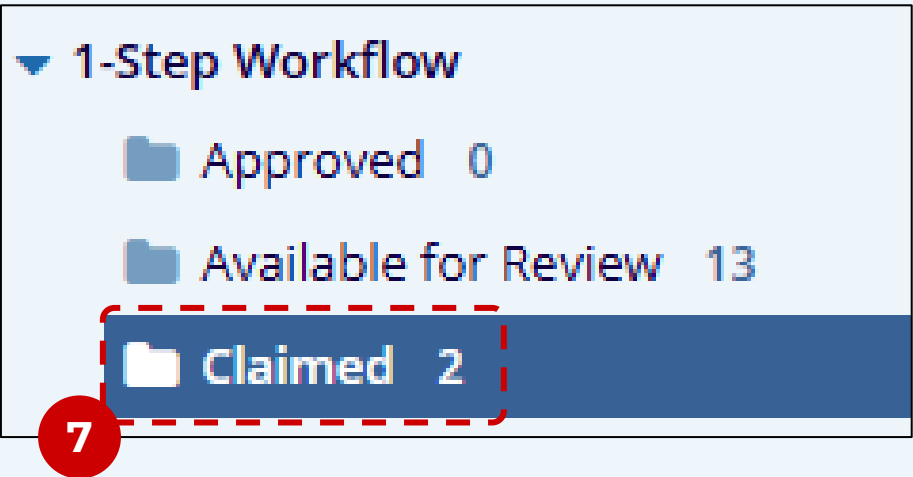
5 Select one or more documents, then click the **Claim** button located in the ribbon.



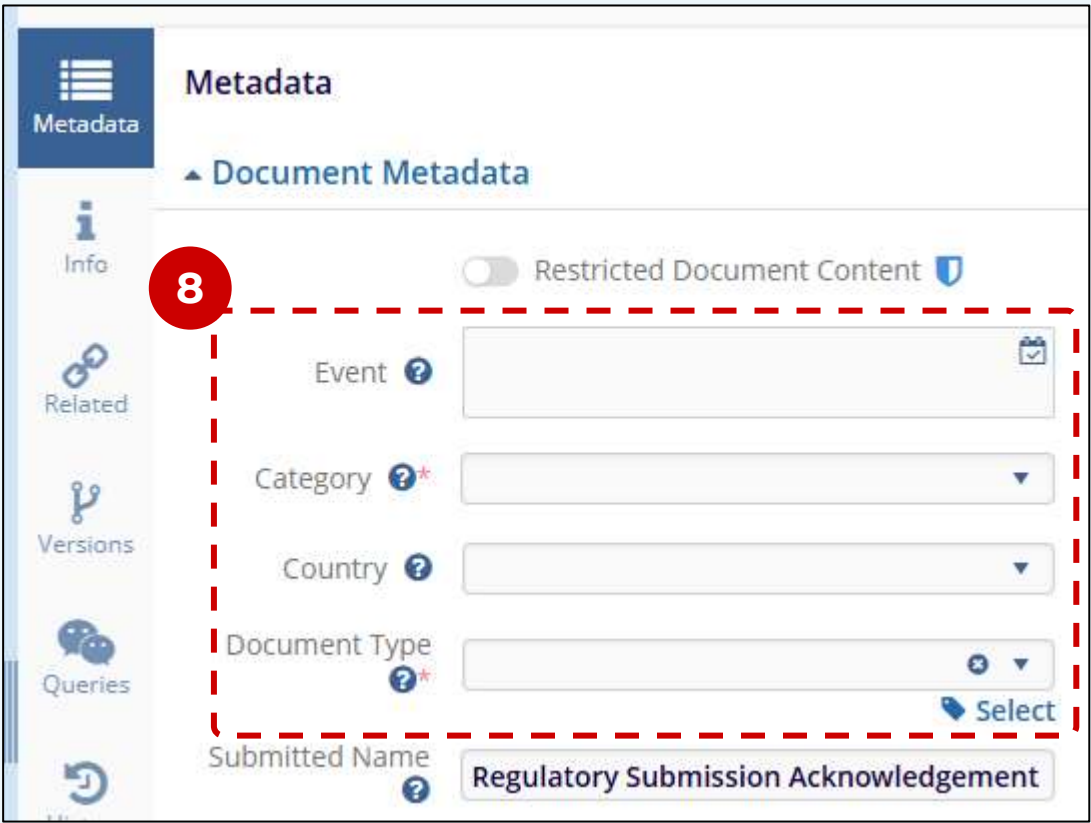
6 Respond **Yes** to the confirmation prompt.




7 Now select the **Claimed** folder.



8 Select and review the content of one of the documents. In the metadata pane, update or fill all required **Metadata Fields**.



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- Scroll down the side panel until you get to the Workflow section. Select the appropriate **Status** for your review decision.



The **Under Review** status can be use to temporarily sideline a document. For the correct use of **Clarification** status, see the Job Aid: *Workflow How to Create a Document Query*.

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- Save** changes at the bottom of the panel to complete the process.

▲ 1-Step Workflow: Approval stage 1

Status*

9

Under Review

Rejected

Clarification

Approved

10

Save

Save & Next