How to Set Document Auto-Claim in a Workflow

TI version 10.7

TRIAL INTERACTIVE
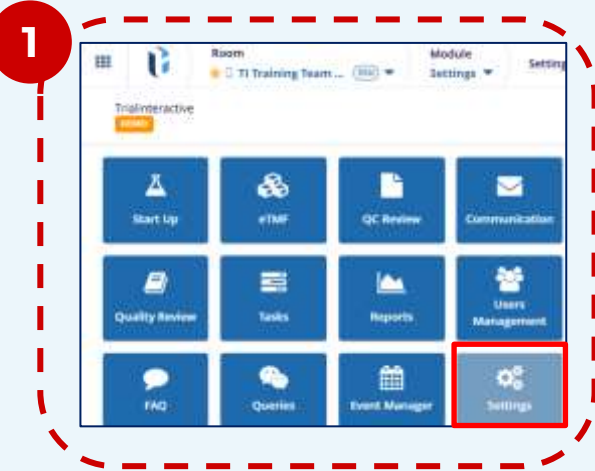
APPLICABLE TO:

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

● eTMF

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

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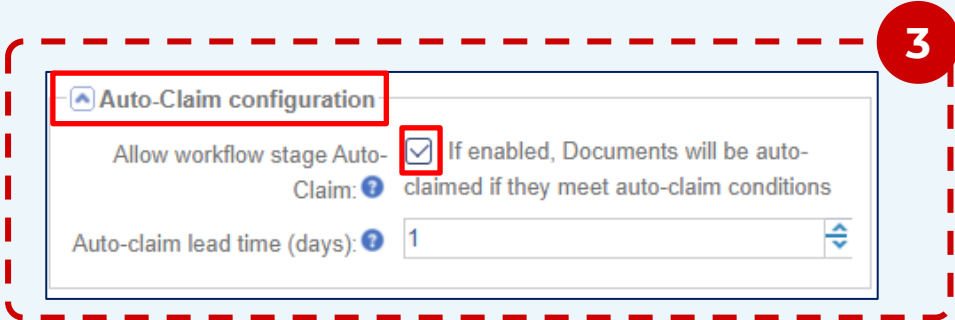

2 Navigate to **Workflows** and expand the folder by clicking on the downward pointing arrow. Select **Common Settings**
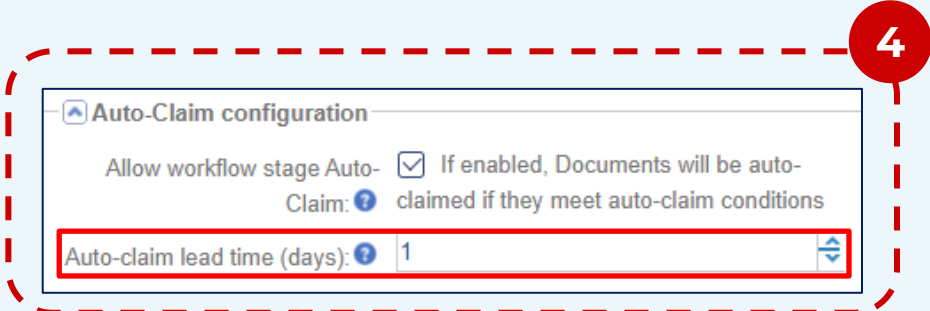

3 In Auto-Claim Configuration section at the bottom of the page, tick the box next to **Allow workflow stage Auto-Claim** to enable the auto-claiming of a document

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

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