

APPLICABLE TO:

Admin

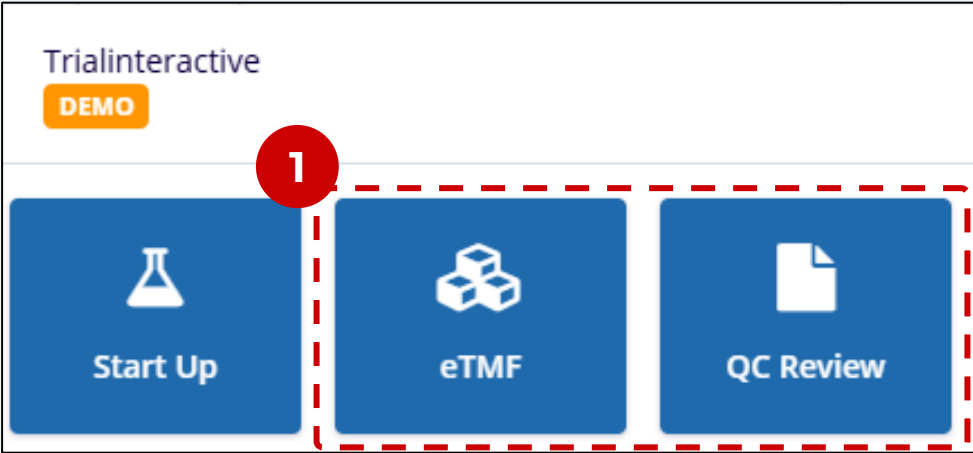
Manager

Editor

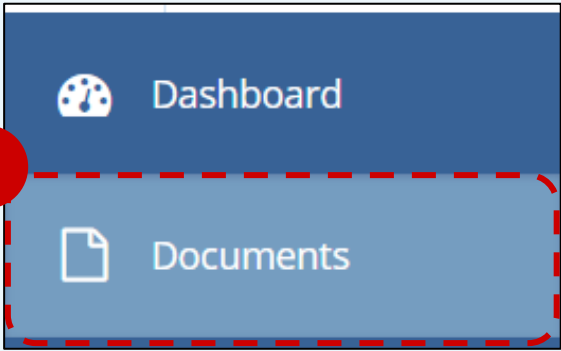
Reader

eTMF

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



2 Navigate to the **Documents** module.



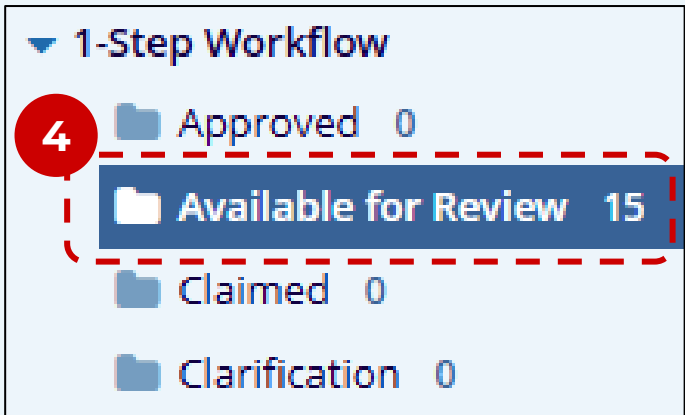
3 Select a workflow view. We recommend **My Workflow Assignments**.



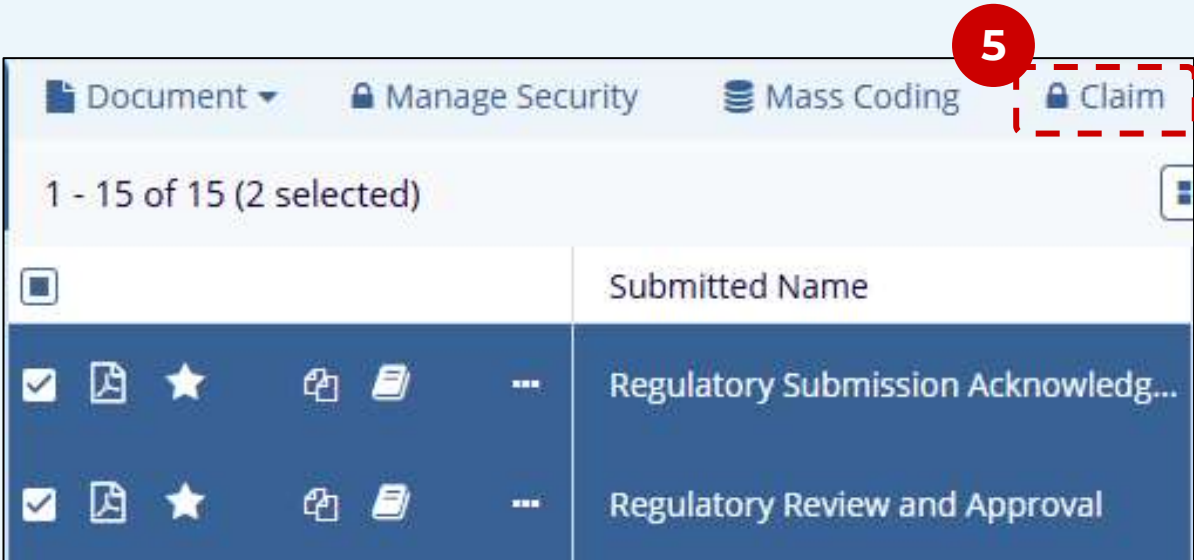
This step is not required in the **QC Review** Module as it supports no view selection.



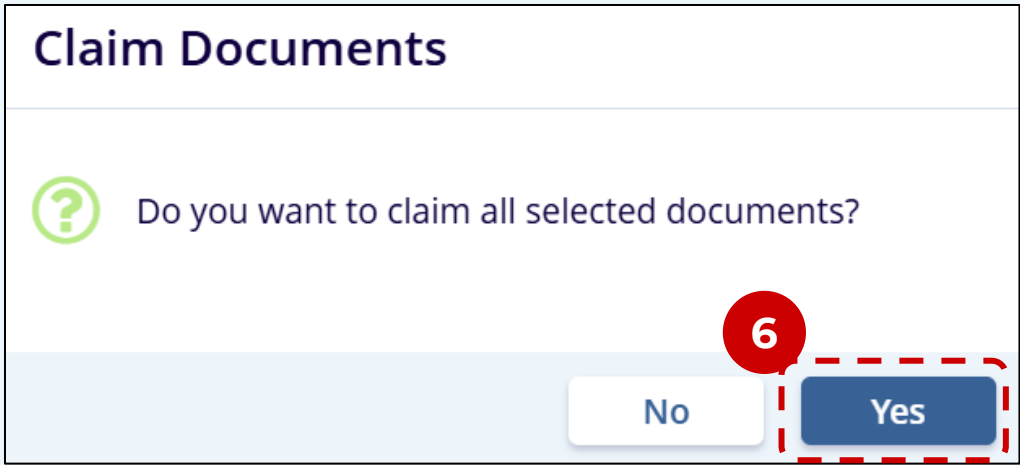
4 Select the **Available for Review** folder.



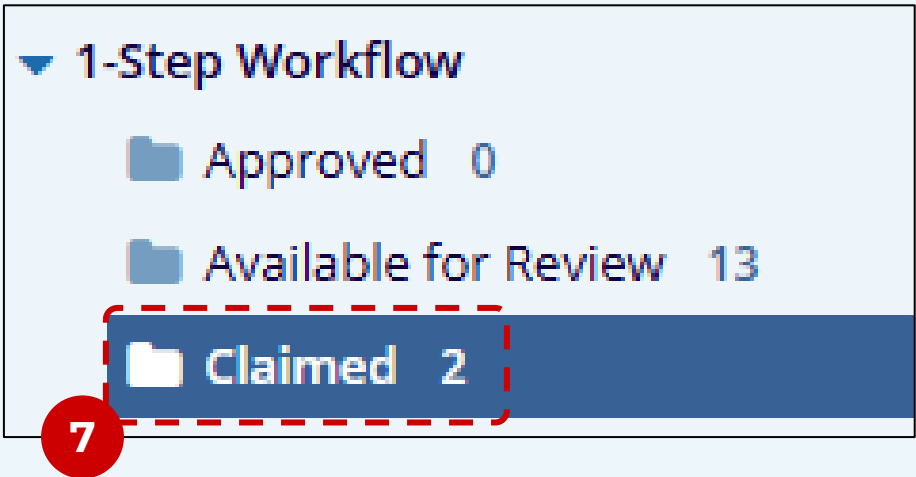
5 Select one or more documents, then click the **Claim** button located in the ribbon.



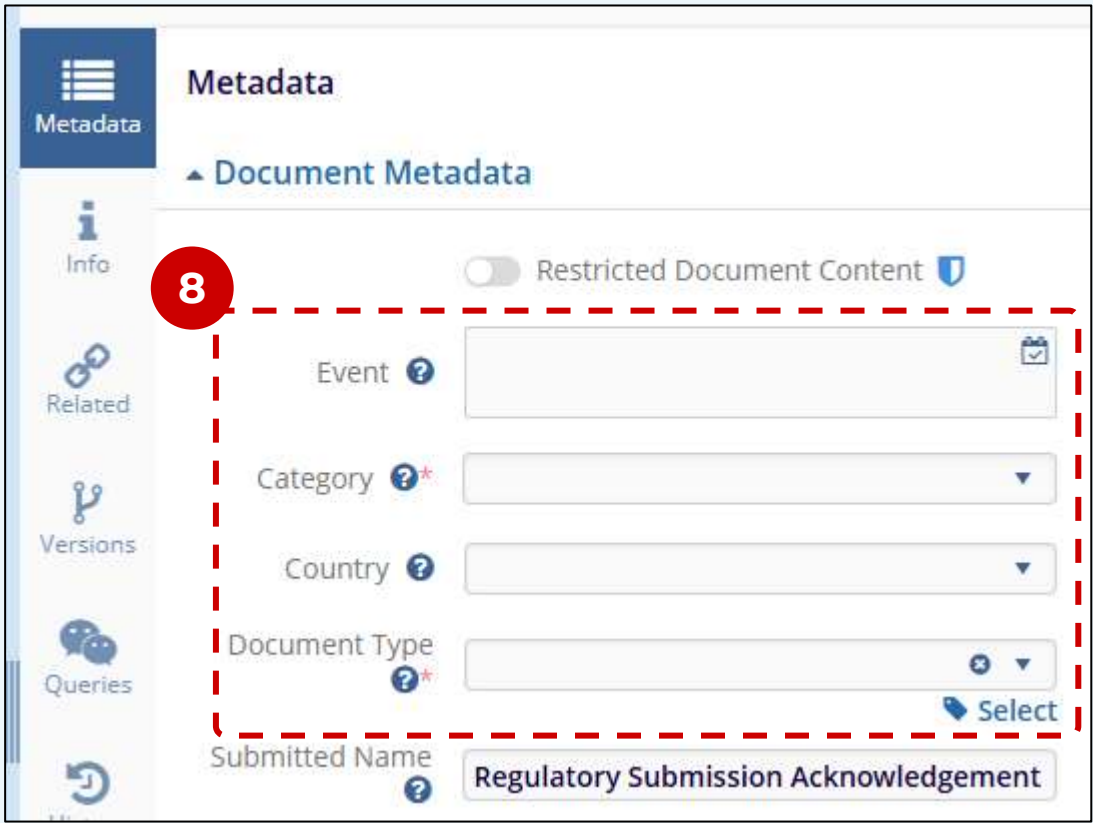
6 Respond **Yes** to the confirmation prompt.




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**.



- 9
- 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*.

- 10
- 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