

How to Review Communications for Relevance

TI version 10.8

APPLICABLE TO:

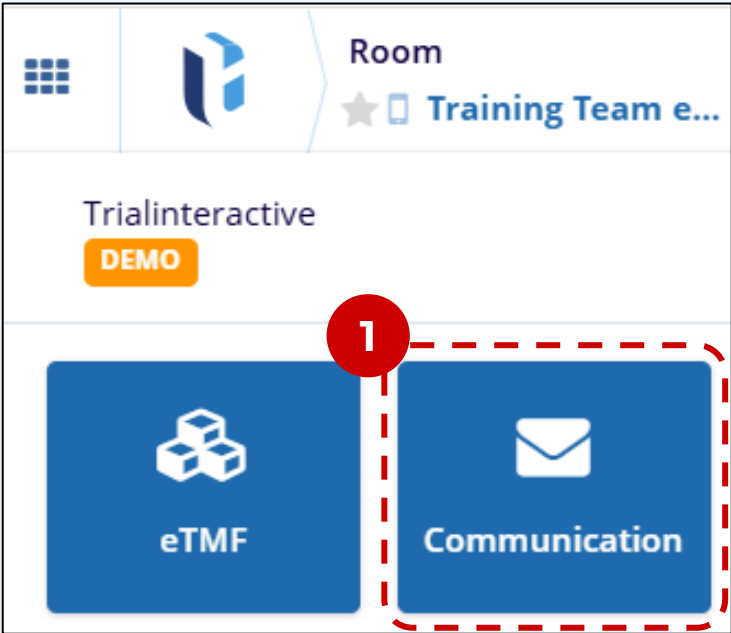
- ☒ Admin
- ☒ Manager
- ☒ Editor
- ☐ Reader
- ☒ eTMF
- ☒ Collaborate

When communications are sent to an eTMF room, a review must be carried out to determine if the content is relevant eTMF material. This Job Aids guides users in performing that review.

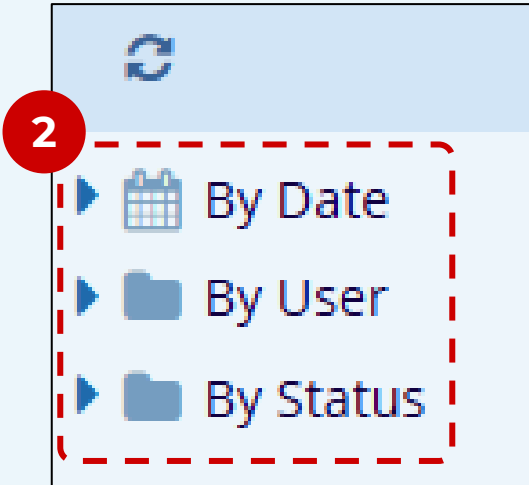
- 1
- Enter a room and access the **Communication** area.



Non-Admin users require the Communications action be added to their profile to perform this activity.



- 2
- Select your preferred **display mode**: By Date, By User (submitter), or By Status.



- 3
- Select** a received communication that is marked as Pending.

1 - 1 of 1 (0 selected)					
☐	Sent Date	Title	Sender N...	Sender A...	Status
☒	31 Oct 202...	Submissio...	Ivanzetto...	Ivanzetto...	Pending

4 In the side panel (to the right) access the attachments to review the submission. The number of attachments varies.

Submission for Comm evaluation

Attachments

4

 [Example Document 2.docx](#)

 [Submission for Comm evaluation.pdf](#)

5 Once your have reviewed the content, decide if it is **Relevant** or **Non-Relevant**.

5

 Relevant

 Non-Relevant



Non-relevant submissions will remain inactive but not deleted.

6 By choosing **Relevant**, you are indicating that the system should generate one or more new documents for the study room using the submission file(s). A document creation window appears, where metadata can be added.



Rooms can be configured to allow users to skip this step when appropriate.

7 We'd recommend starting the metadata configuration process with the **Document Type** field.

Metadata

Document Metadata

☐ Restricted Document Content 

Category *

Country

Document Type *

7

 Select

Submitted Name *

Submission for Comm evaluation.pdf

How to Review Communications for Relevance

- 8 When a submission consists of multiple files, you may find the controls at the bottom of the window helpful. These allow you to **skip** creation of a document you don't deem necessary for the eTMF, as well as **copy the selected Metadata** to the next document.

8

☒ Use the same metadata for the next document

☐ Skip this document

Previous

Finish

9

- 9 When you have set all the documents, click **Finish**. This generates documents that will undergo the normal QC process in the eTMF.

- 10 Relevance status is clearly marked in the submissions list.

Sample Comm			9	Relevant
Test do not ...				Non-Relevant