

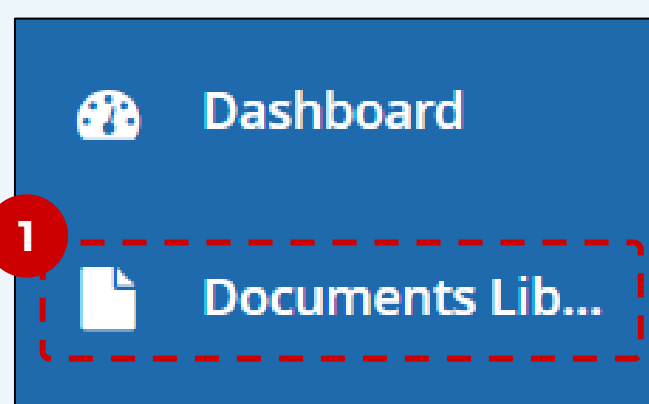
APPLICABLE TO:

- Admin
- Manager
- Editor
- Reader
- Collaborate
- eISF

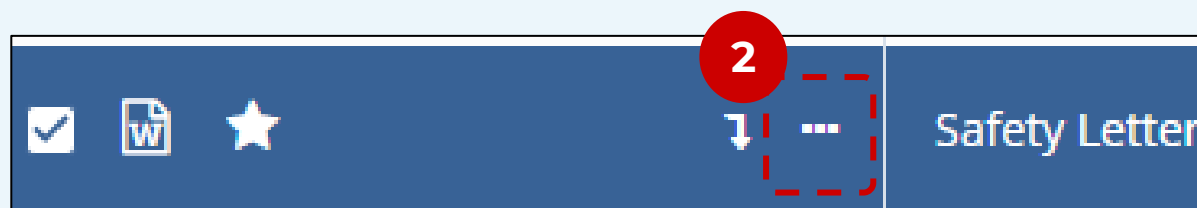
TI Rooms built around the Collaborate product – which include eISF and QDMS rooms among others – support an optional feature to send documents while requesting an acknowledgement, especially useful for key information that sites need to read, like Safety Letters, for example. To set the feature up in an existing room, contact your assigned CSM or Trial Interactive representative.

Part 1: Requesting a Read & Acknowledge

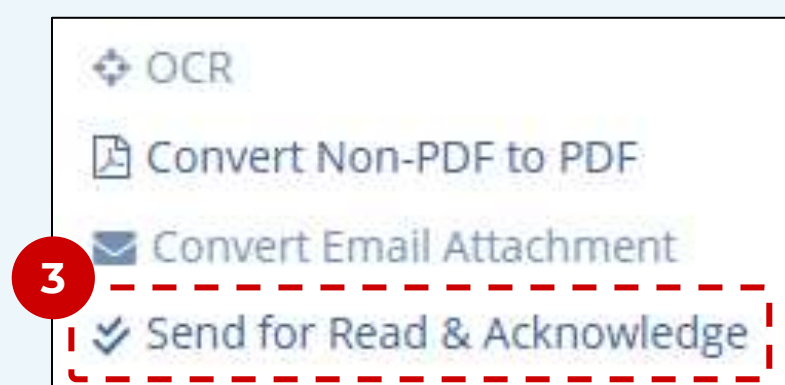
- 1** **Navigate** to the Documents Library.



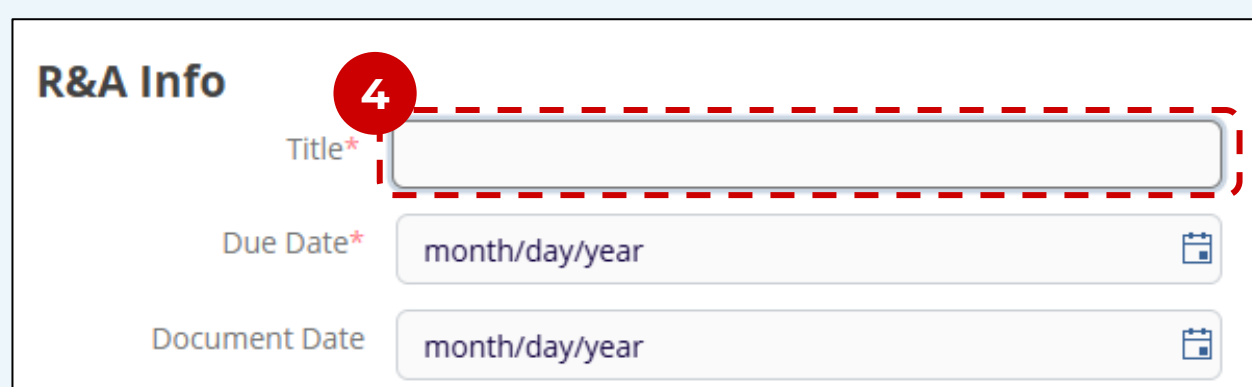
- 2** Pick a document. **Right-click** on the document line, or click on the **ellipsis**, to open the Document Actions menu.



- 3** Click **Send for Read & Acknowledge**. A new window opens.





- 4** The Read & Acknowledge request will be sent as an email. Insert a **Title**.



R&A Info

Title*

Due Date* 

Document Date 

5 Use the **Calendar** button to set a limit date for the acknowledgement.

6 Fill the other non-required fields.

7 [Optionally] Click on **Select Sites**. This allows to pre-select recipients based on their site role.

8 Select one or more sites using the checkboxes.

<input type="checkbox"/>	Site #
<input type="checkbox"/>	001
<input type="checkbox"/>	051

9 Only contacts that are assigned to R&A are selectable. In case of a site not having such a contact, you will be alerted; click on **Go To Contacts**. This opens in a new tab.

10 Select a contact to see their details in the side panel. Enable any contact for R&A by checking **Contact is responsible for Read & Acknowledge Documents**, and Save the change.

Contact Type *
Project/Product Contact

Main Contact

Contact is responsible for Read & Acknowledge Documents

Email Address
PerryColombo@ti.com

11 Return to the previous tab (displaying R&A setup). Confirm your site selection and click **Select**.

Cancel Select

12 [Optionally] Set reminders that will be mailed to recipients.

Reminders

+ Add Reminder

Reminder 1

1 Days Weeks Before Due Date

13 Move to the **Next** page.

Cancel Next

14 Contacts selected via Sites will show here. Add recipients with search or **Browse All** if required.

Recipients

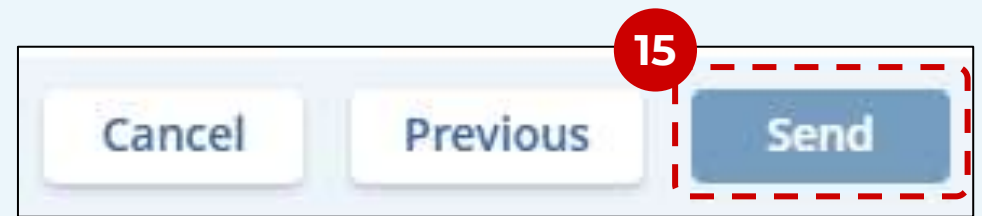
Search Global Search

Remove

1 Users

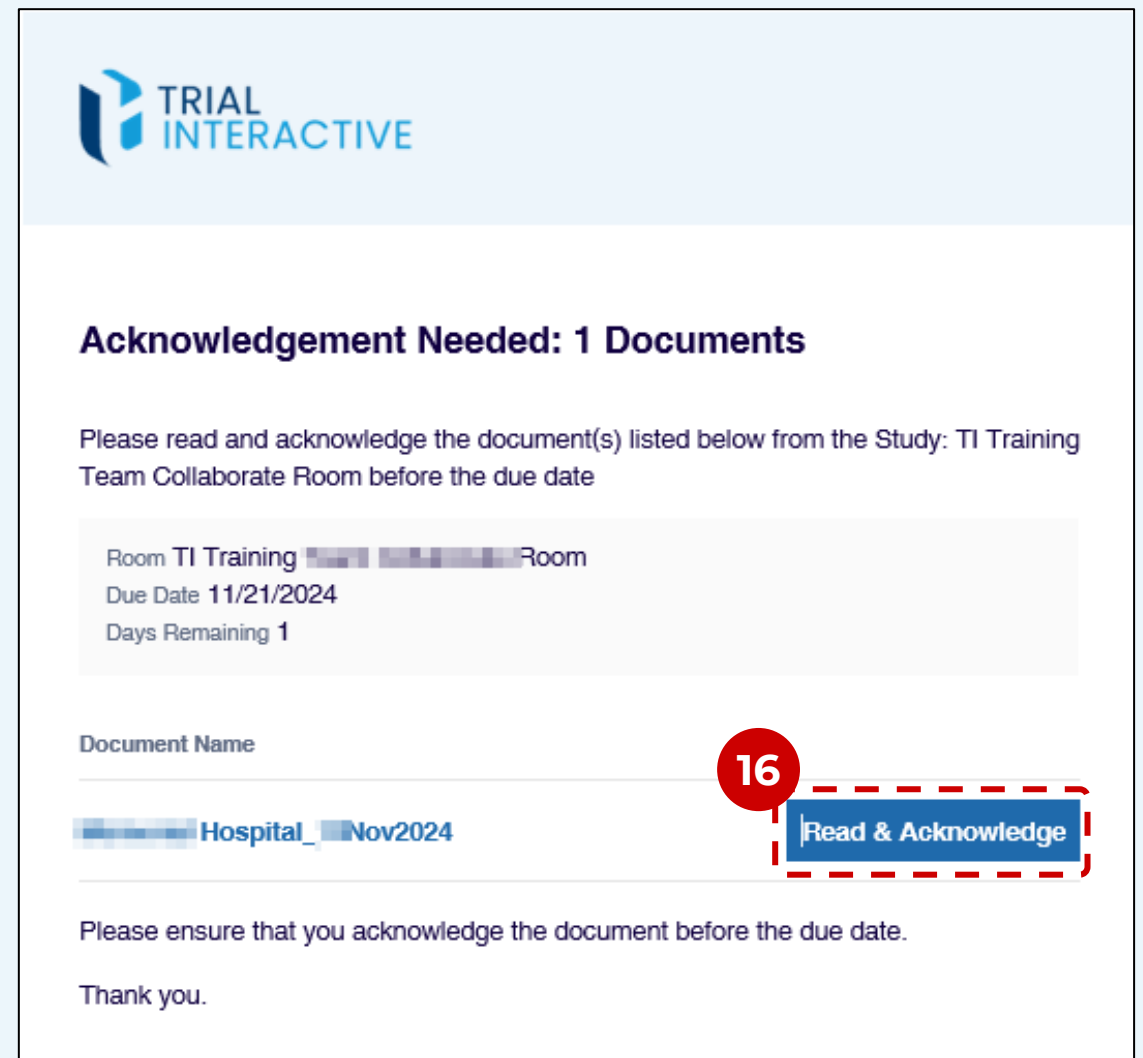
<input type="checkbox"/>	Name	Email	Contact Type	Site
<input type="checkbox"/>	Brad Pitt	BradPitt@memorialhospital.com	Project/Product Contact	Memorial Hospital

15 Click Send to email the R&A request to recipients.

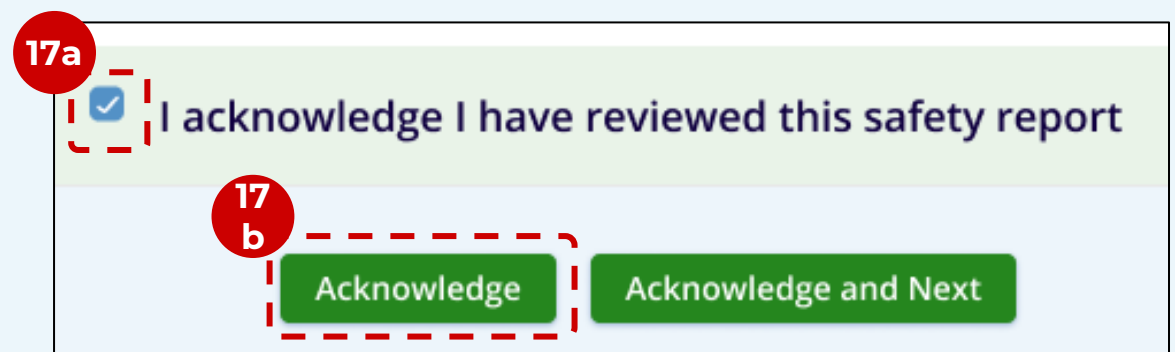


Part 2: Responding to an R&A Request

16 Recipients will get an email requesting acknowledgement. Click on **Read & Acknowledge** to proceed.



17 The Document Viewer will open in your browser. Read the document carefully, then **check the box** for acknowledgement, and click **Acknowledge** to finish.



Registered users can track their R&A requests in the Documents module, using the **My R&As Received** view.

