

APPLICABLE TO:

- Admin
- Manager
- Editor
- Reader
- Offering 1
- Offering 2

Some of the best tools to monitor workflow activity are dashlets. We propose a selection of some that you might want to consider, with their default location.

In the **eTMF** group

- Claimed & Unclaimed
- Rejected and In-Clarification Documents
- Open Queries By Age

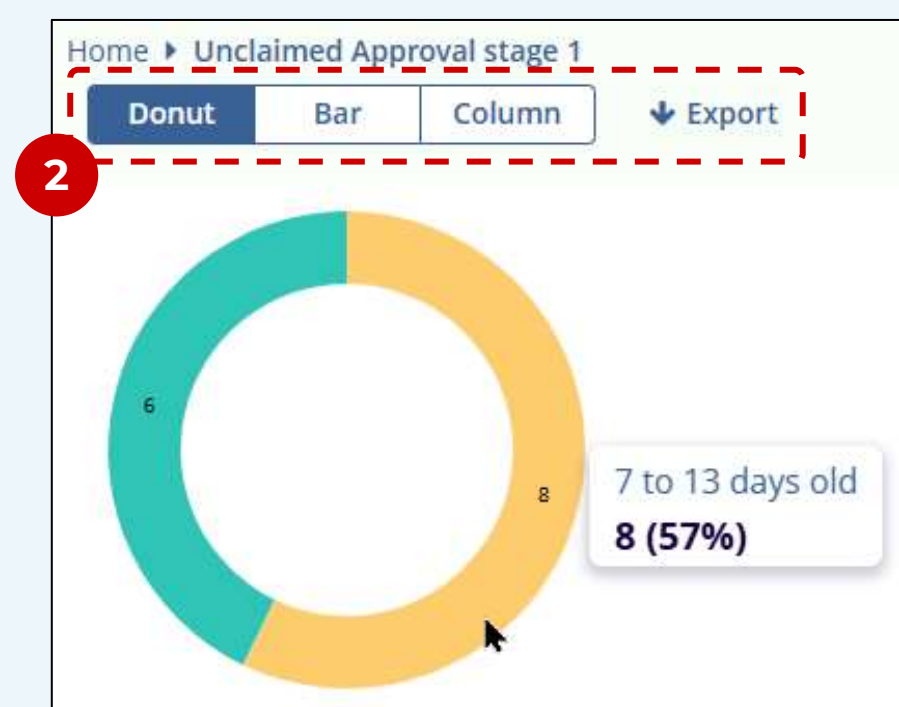
In the **Documents** group

- By Workflow Status

1 The **Claimed & Unclaimed** Documents dashlet provides a count of all documents that are in a workflow and are either claimed, unclaimed, or in progress. It also provides insight on the timeliness of processing.

Users can click on each slice of the interactive chart to obtain detailed information about each status.

Refer to screenshots below:



2 Chart and graph dashlets can be visualized as different types of charts, and the charts can be **Exported** as images to various locations.

3 The **Rejected and In-Clarification Documents** dashlet offers a tally of documents that were rejected or needed clarification within the workflow. The reasons for this are displayed with a counter, and a list of affected documents can be displayed, so that bottlenecks and other issues can be identified quickly and addressed by the team.

The screenshot shows the 'Rejected & Clarification' dashlet. At the top, there are navigation tabs: 'eTMF Health', 'Claimed & Unclaimed', 'Documents Expiration', 'Rejection & Clarification' (selected), and 'My Queries'. Below the tabs, it says '1 - 13 of 13 (0 selected)'. A table lists reasons and counts:

Reason	Count
Missing Pages	18
Other	8
Image Quality	6
Blank Pages	6

A red dashed box labeled '3a' highlights the '+' icon next to 'Missing Pages'. To the right, a detailed view of 'Missing Pages 18' is shown, with a red dashed box labeled '3b' highlighting the list of documents:

Submitted Name
Contact Details_List
DataPrivacyAgreement
Dr. C-CV

4 While queries are not always related to workflow, the **Open Queries by Age** dashlet offers the ability to identify queries to be prioritized for quick resolution, which has a large impact on completing QC reviews on time.

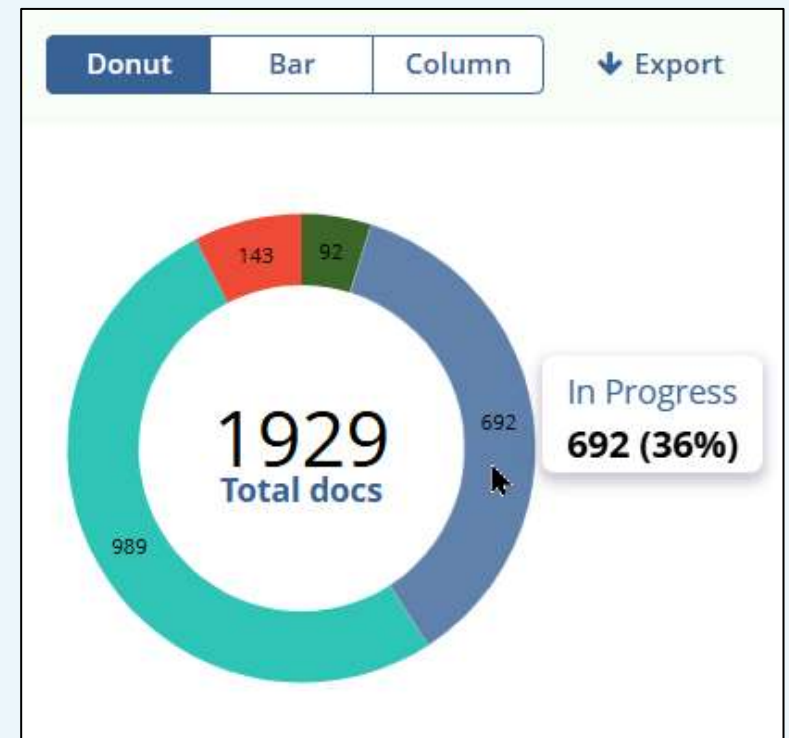
The screenshot shows the 'Open Queries by Age' dashlet. At the top, there is a 'Workflow' dropdown menu. Below it, it says '1 - 2 of 2 (0 selected)'. A table lists query ages and counts:

Age	Count
30 days and older	51
Less than a week old	1

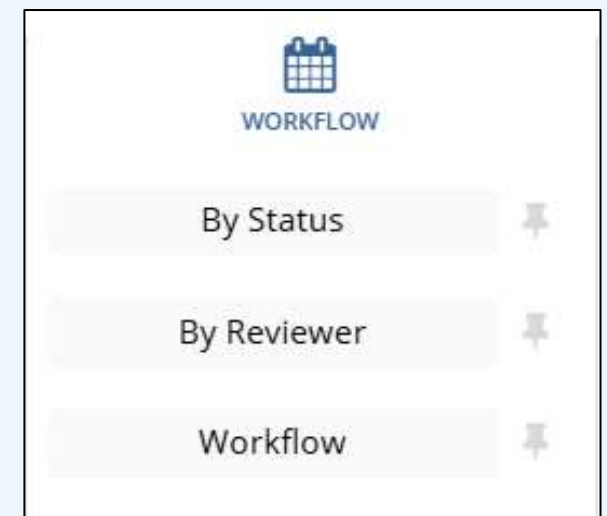
A red dashed box labeled '4' highlights the 'Less than a week old' row. Below the table, there is an 'Export' button and a 'Pending 1' section. The 'Pending 1' section shows a list of queries:

Submitted Name
Conversation1.pdf

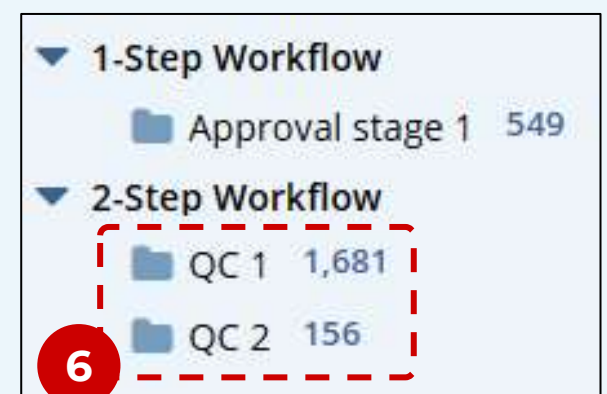
5 The **By Workflow Status** Documents dashlet will display a breakdown of statuses in the form of a graph. The slices on the graph are not interactable, so this one serves mainly an oversight purpose.



Users can also leverage the [Documents Module](#) to monitor progress of single documents through the workflow. This can be done using Views under the Workflow group.



6 The **Workflow** view will display a breakdown of the existing workflows and their stages. This is mostly helpful to understand the existing workload.



7 **By Status** and **By Reviewer** will make for a more granular view of where documents sit within a workflow at present time.

