

Workflow: How to Resolve a Document Query

TI version 10.7

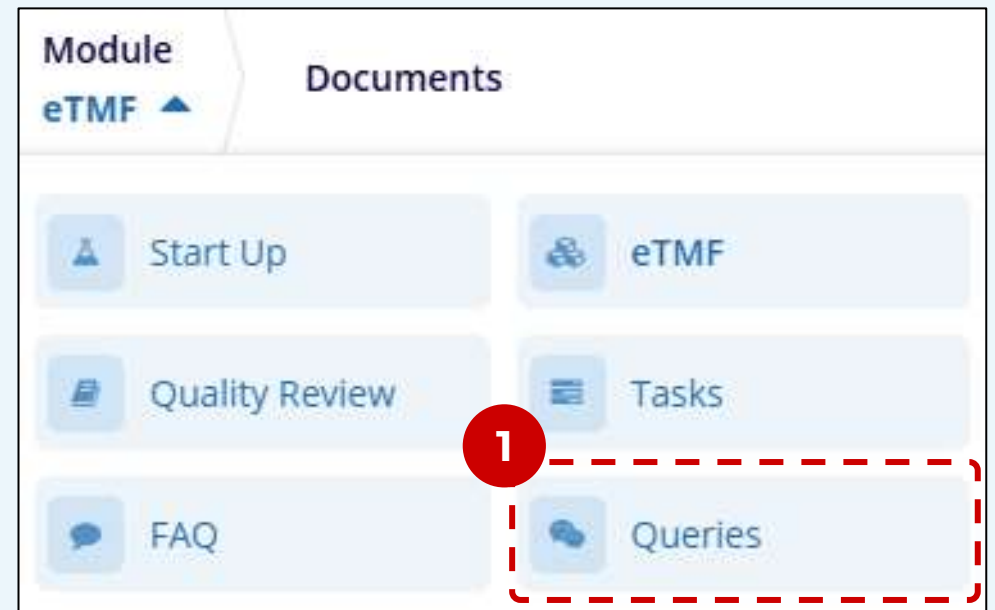
APPLICABLE TO:

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

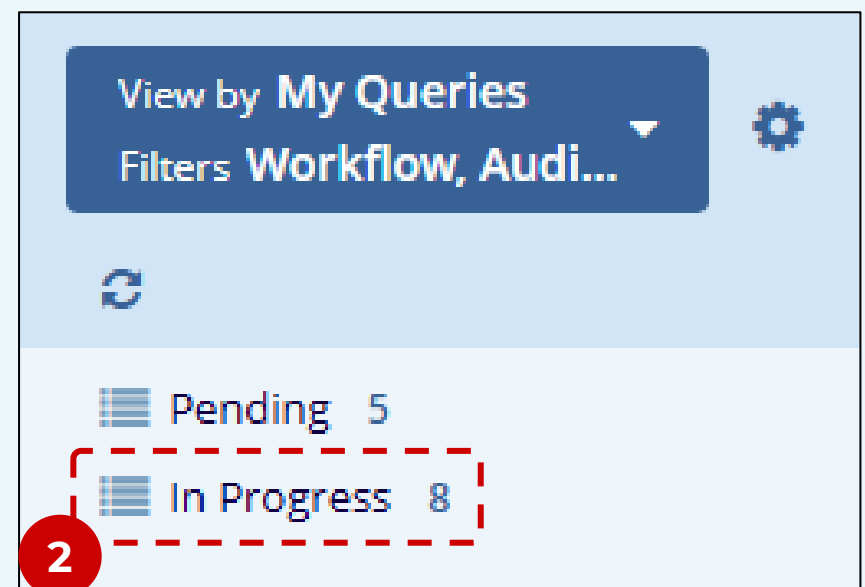
Users who receive Query messages from Trial Interactive can respond via email, as well as via TI, to supply required information and/or new versions of documents.

When using email as a response method, the reply will be captured within the unique Query ID thread for review, so long as the responder does not change the Subject of the email when replying.

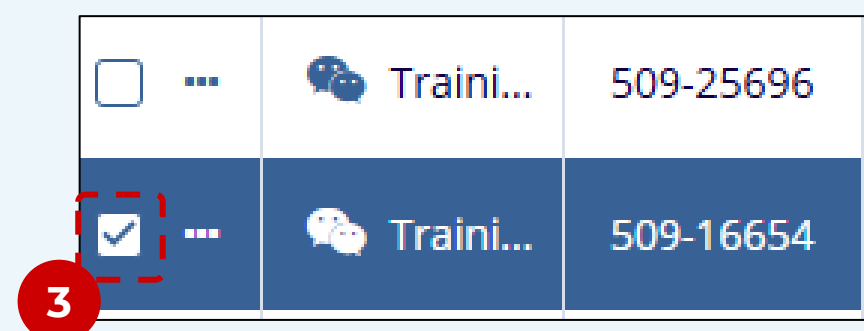
1 Access the **Queries** module.



2 Select the **In Progress** folder.
This includes only queries that have received a reply.



3 **Select** any query and expand the Metadata Panel if not already visible.



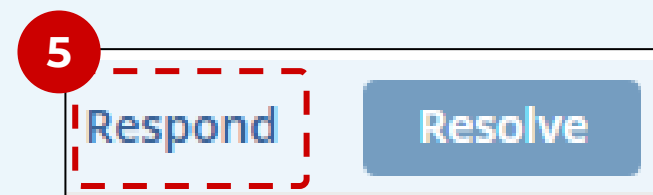
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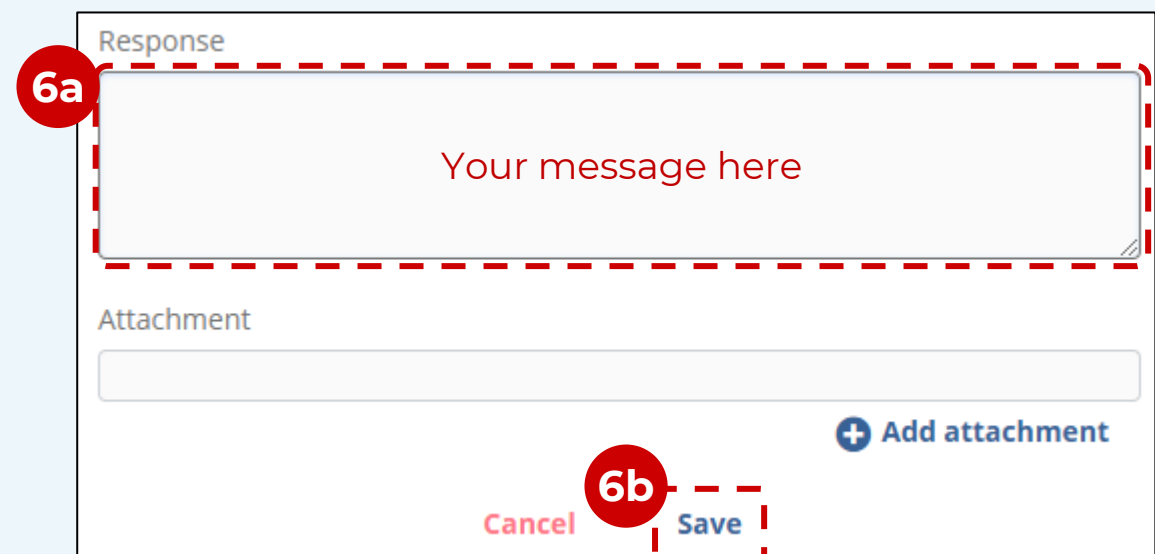
4 Locate and expand the **Response** panel.



5 Based on the response, determine if you wish to Resolve the query (go to step #8), or send further requests via **Respond**.



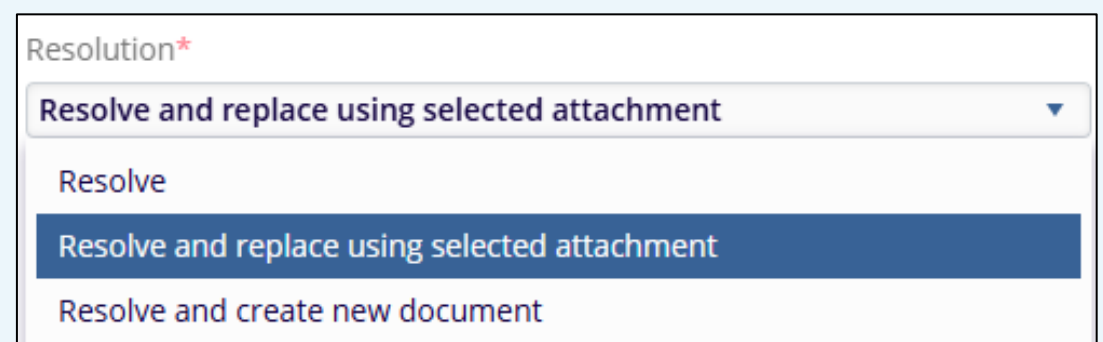
6 If you choose to respond, **write** your message in the blank field, then click **Save**.
You can optionally add documents via Add Attachment.



7 After sending your response, change the query status: click **Back To Pending**.



8 If you choose Resolve, a new window opens with up to three resolution methods available.



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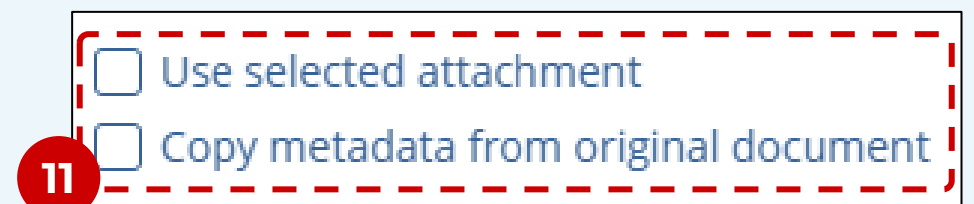
9 Using the simple **Resolve** option, the query is closed and the document and workflow are left unaltered.



10 Using **Resolve and replace using selected attachment** will display (one of) the attachments in the larger panel. You can select different attachments and compare before deciding which will replace the current document content.

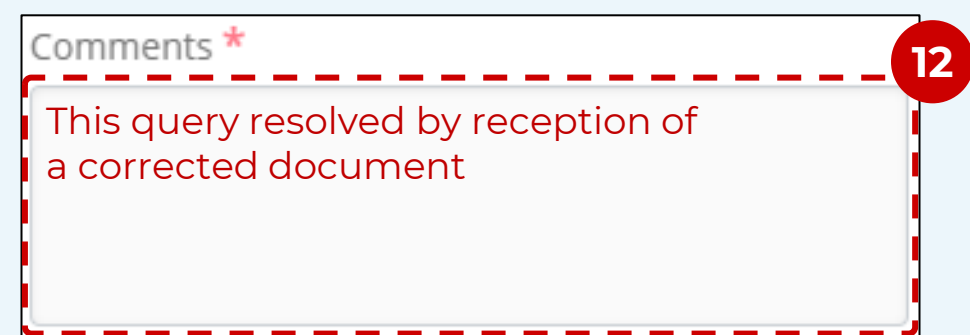


11 The **Resolve and create document** option implies the current document will be discontinued (rejected or deleted).



You can choose from support options to automatically place a new document with the selected attachment in the eTMF, and inherit the metadata from the current document.

12 All resolution methods require you to add **Comments** before you can finalize.



13 Click the **Resolve** button to confirm your choices and close the query.



14 If using options in steps 10 and 11, the user should follow up by accessing the document under review, and completing the workflow **status** assignment there.

▲ 1-Step Workflow: Approval stage 1

Status*

Clarification ▼

Under Review

Rejected

Clarification

Approved

Submission

Comments

Missing signature

