

# Workflow Initiation

To begin a Workflow Initiation, select the Actions Menu on a Document in Draft status and select **Send for Review** or **Send for Approval**.

## Steps to Initiate a Review Workflow

Note: to initiate a Review Workflow the document must be checked in, completely [Indexed](#), and in Draft status.

After selecting Send for Review...

You are able to start the workflow within the eTMF or indicate the review occurred outside the eTMF. Select from a list of one and two stage review workflows configured for the specific document type (or all applicable document types).

Enter a list of reviewers based on workflow configuration.

Select a purpose / meaning for review for each selected reviewer.

To allow the reviewers to delegate the task, select Allow Delegation.

Optional: Add a message for the recipients in the Message to Recipients field.

Select a **Due Date** and time for that step of the Task. The date can be changed by selecting the Calendar icon and the Time can be changed by selecting the Clock icon.

If the Workflow has multiple steps, select **Next** and repeat the previous steps. If the Workflow has one step, select **Finish** to begin the Workflow.

# Steps to Initiate an Approval Workflow

Note: to initiate an Approval Workflow the document must be checked in and all required metadata must be entered.

Select users and the meaning of their approval.

Indicate if users are allowed to delegate this task.

Optional: add a message to recipients in the Message to Recipients field.

Select a **Due Date** and time for that step of the Task. The date can be changed by selecting the Calendar icon and the Time can be changed by selecting the Clock icon.

When you are ready to begin the Approval Workflow, select Finish.