# How to Reassign Documents as Audit Manager
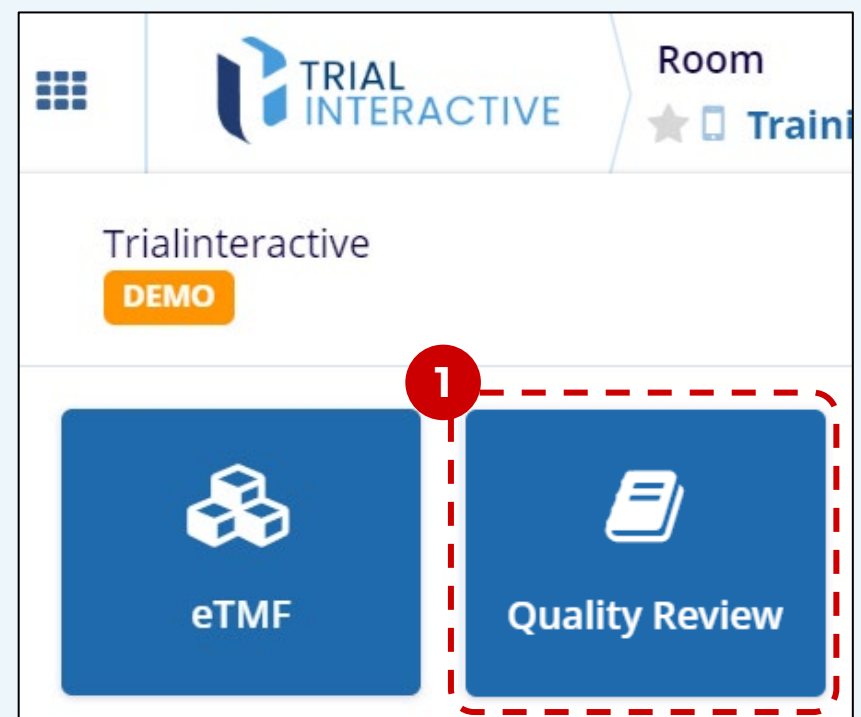
**TI version 10.6**

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**APPLICABLE TO:**

- ● Admin
- ● Manager
- ● Editor
- ○ Reader

- ● eTMF
- ● Collaborate

Audit Findings are created when a document receives a Failed status during an audit. Findings are pooled for any Audit Responder to address.
The steps below show how a specific Responder can be assigned to a Finding by the Audit Manager.
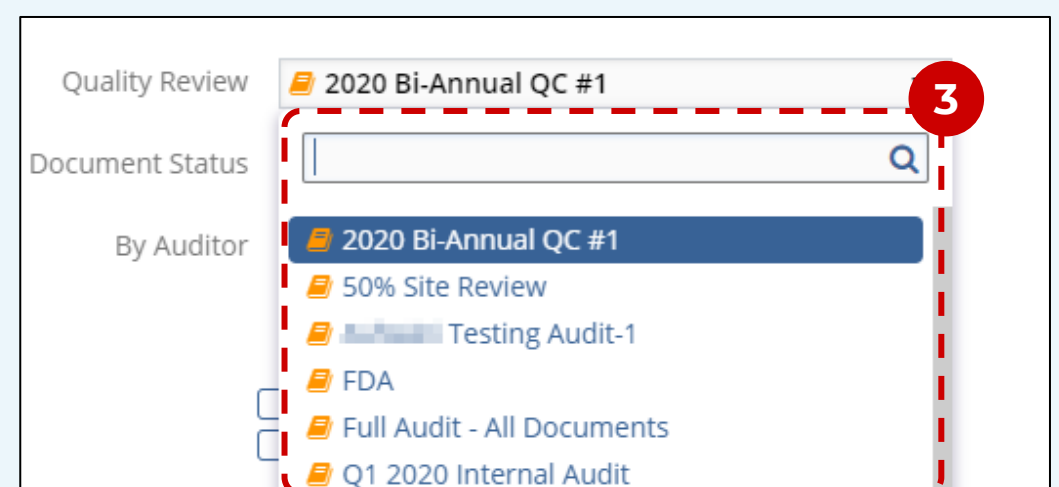These steps assume the user has been previously assigned the role of Audit Manager.

**1** Access the **Quality Review** module in the chosen room.

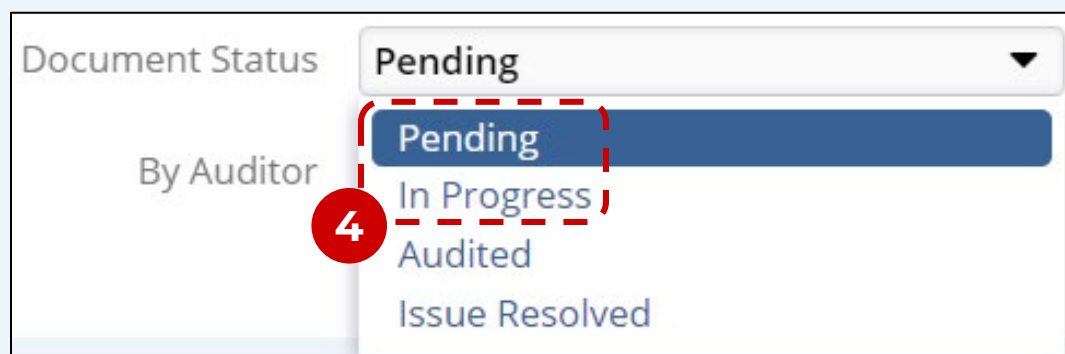**2** Enter the view selector to pick an **Audit** (names shown are examples).
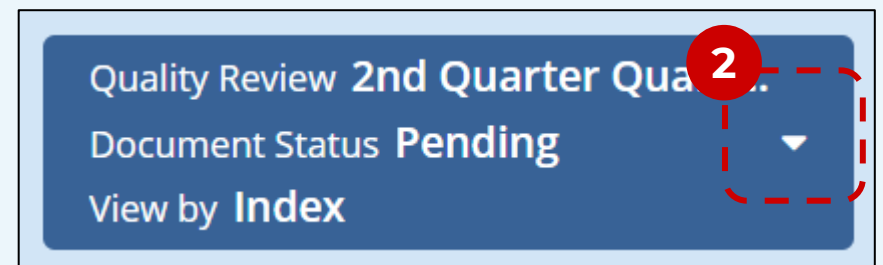
**3** Select one of the available **Quality Review**s (marked in orange).
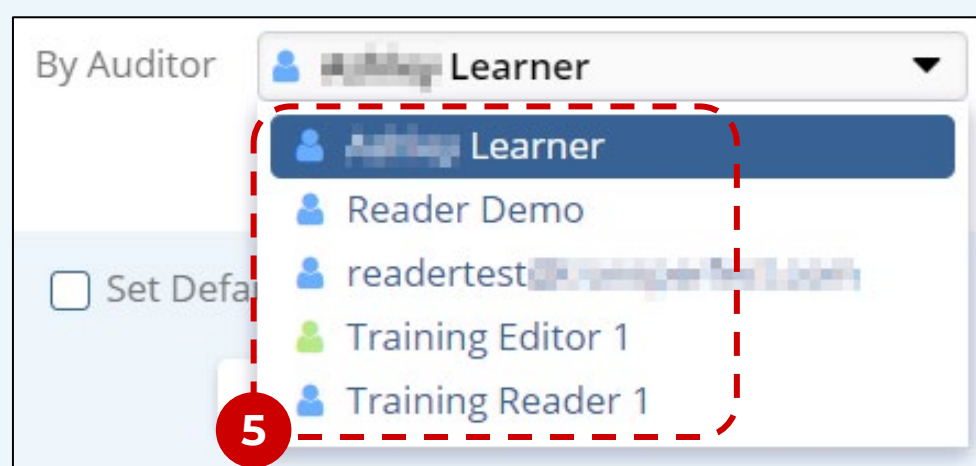Or, type to search within the list.

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**4** Select a Document Status of **Pending** or **In Progress**.

Document Status | Pending ▼
By Auditor |
Pending
In Progress
4
Audited
Issue Resolved

**5** In the <u>By Auditor</u> dropdown, select a user that documents are currently assigned to.

By Auditor | 👤 ███ Learner ▼
👤 ███ Learner
👤 Reader Demo
👤 readertest██████████
👤 Training Editor 1
👤 Training Reader 1
5

**6** Confirm your choice by clicking **Select**.

☐ Set Default  ☐ Set Default for all Rooms
6
Cancel  **Select**
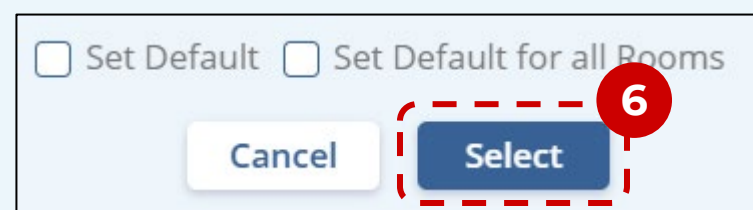
**7** Select a **folder** to view eligible documents.

▼ 📂 Index
  ▼ 📁 Trial  1
    📁 04 IRB IEC and Other Approvals  1
  ▶ 📁 Site  9
  ▼ 📁 Staging  11
    📁 Site 1001 Docs  3
  7
  ▶ 📁 *Upload  24
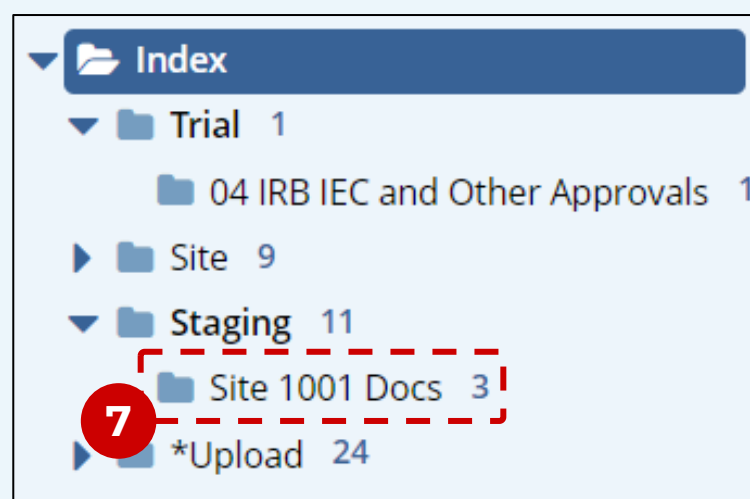
**8** Select one or more documents.

8
| ☑ | | | | | Submitted Name |
|---|---|---|---|---|---|
| ☐ | 📄 | 📕 | ★ | ⋯ | FDA 1572_Jones |
| ☑ | 📄 | 📕 | ★ | ⋯ | Acknowledgement IB Sig |
| ☐ | 📄 | 📕 | ★ | ⋯ | DataPrivacyAgreement |

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**9** In the top ribbon, click **Assign To**.

📄 Document ▾    ✉ Email    ⬇ Export ▾    💾 Assign To **9**

Quality Review **2nd Quarter Quality R...**
Document Status
View by **By Audit Findings**

1 - 8 of 8 (1 selected)
■
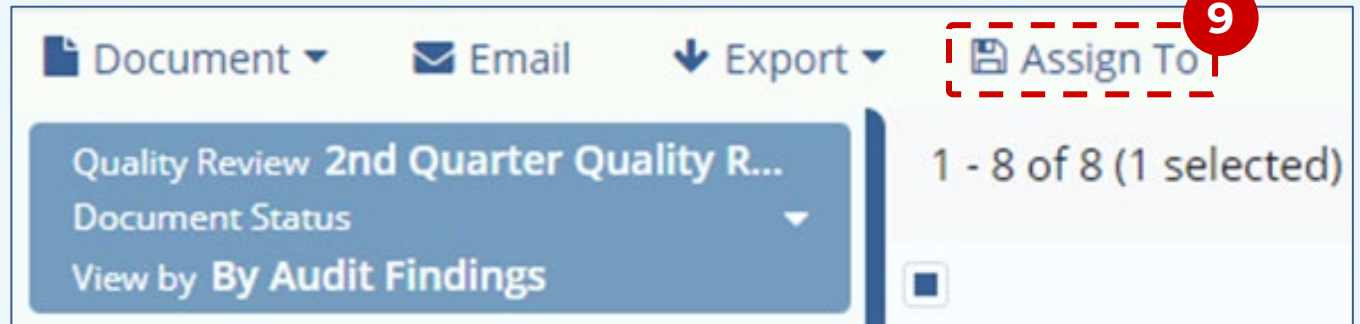
**10** The document(s) can be reassigned automatically. **Uncheck** the box to make a manual selection.

**11** Select one of the available **Auditors** (a list displays when clicking on the field).

**12** Click **Assign** to finalize.

**Assign To** ✖

**10** ☑ Automatically reassign randomly between existing auditors

**11** Auditors *

Cancel    **Assign** **12**