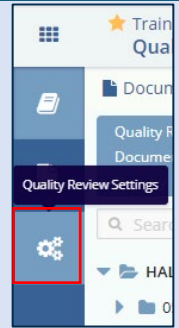
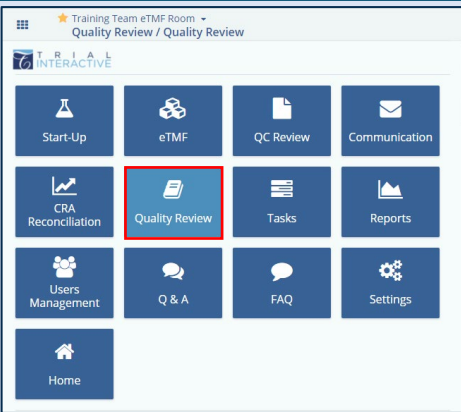


APPLICABLE TO:

- Administrators
- Room Managers
- Editors
- Readers
- eTMF
- Study Start-Up
- myTI

1. Navigate to the **Quality Review** module and then access the **Quality Review Settings** from the toolbar at the left side of the screen.



2. Click on the **Quality Review Status** tab.

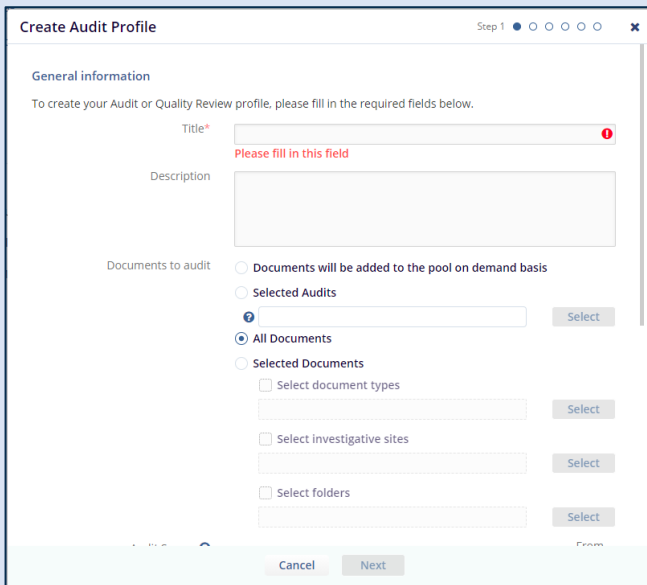


3. Review the existing status options and edit or add statuses as required.

<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Display Name	System Status
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Excluded	excluded
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fail	failed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	In Progress	inProgress
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pass	passed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pending	pending

4. Click on the **Documents Quality Review Settings** tab and click Add to create a new Audit.

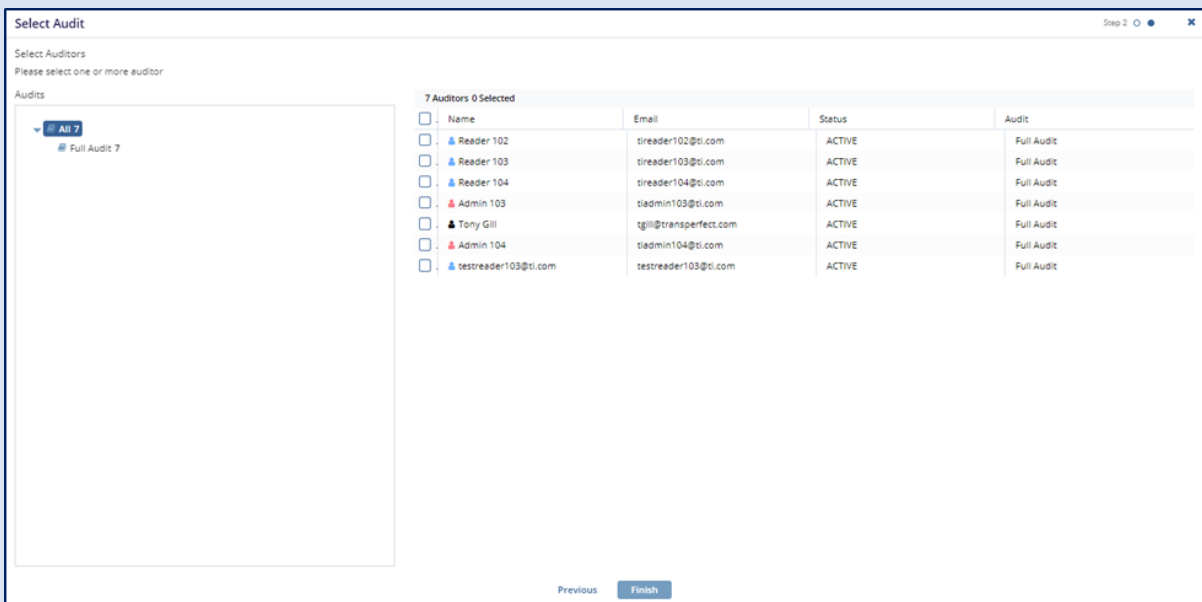




5. The **Create Audit Profile** wizard will open. Complete the required fields as indicated with red asterisks.

***For a full discussion of the options available when creating a new Audit, please speak to your TI representative about our Quality Review training courses.**

6a. The **Documents to Audit** area has several options to choose from: 'Documents will be added to the pool on-demand': This option will create a blank audit with no documents in it. Users can then add documents to the audit manually via the Documents Cart.



Name	Email	Status	Audit
Reader 102	tireader102@ti.com	ACTIVE	Full Audit
Reader 103	tireader103@ti.com	ACTIVE	Full Audit
Reader 104	tireader104@ti.com	ACTIVE	Full Audit
Admin 103	tiadmin103@ti.com	ACTIVE	Full Audit
Tony Gill	tgill@transperfect.com	ACTIVE	Full Audit
Admin 104	tiadmin104@ti.com	ACTIVE	Full Audit
testreader103@ti.com	testreader103@ti.com	ACTIVE	Full Audit

6b. 'Selected Audits': This option indicates that the audit will be reviewing the work done in a prior audit or set of audits, essentially mirroring previous reviews.

Documents to Audit

Documents will be added to the pool on-demand

Selected Audits

All Documents

Selected Documents

ANY of the selected criteria (logical OR)

ALL of the selected criteria (logical AND)

Select document types

Select investigative sites

Select folders

Select Select Select Select

6c. ‘All Documents’: This option will tell the system to treat all documents as available for inclusion.

6d. ‘Selected Documents’: This option allows the user to specify the criteria to be used in gathering documents for review.

Note. When selecting document folders manually for inclusion in an audit, the system always applies **“Automatically Check Subfolders”**. This includes documents from all subfolders for each main folder you do select. Be sure to deselect the checkbox first thing if you **do not** wish to include all subfolders in the audit.

Select Folders

Show Empty Folders

Automatically Check Subfolders

Search

- Index
 - 01 Trial Management
 - 01.01 Trial Oversight 3
 - 01.02 Trial Team 2
 - 01.02.01 Trial Team Details
 - 01.02.02 Trial Team Curriculum Vitae
 - 01.03 Trial Committee
 - 01.03.01 Committee Process 1
 - 01.03.02 Committee Member List

Cancel Select

Select Folders

Show Empty Folders

Automatically Check Subfolders


Search

- Index
 - Trial
 - 01 Trial Management
 - 01.01 Trial Oversight
 - 01.02 Trial Team
 - 01.02.01 Trial Team Details
 - 01.02.02 Trial Team Curriculum Vitae
 - 01.03 Trial Committee
 - 01.03.01 Committee Process

Cancel Select




7. If there are any errors detected in the way that the audit is created (e.g. a step was missed) the audit summary will highlight issues and prevent you from saving the audit until they are corrected.


Audit Response 
❗ Major issues found. Audit profile cannot be saved

No active audits response defined. You have to define at least one active audits response person.

8. Click **Finish** at the bottom of the window. You may be asked if you want to activate the audit immediately, in which case documents will be added to the audit pool immediately. You can leave an audit dormant for later activation; in that case, it will be marked as a **Draft**.

Auditors 
✔ No issues found

The following users and groups are defined as auditors:


✔  Reader 102

Previous
Finish

Activate and publish
✕

? Do you want to activate this audit right now?

No
Yes

 **Note.** Once an audit has been activated, it cannot be edited. If you need to alter the audit parameters, you will need to disable the incorrect audit and recreate the audit.

9. Manage your audits in **Documents Quality Review**. You can, among others, remove or edit audits, change their activation status, or reassign users. (You need to have an audit selected in the main panel for some buttons to work)

Documents Quality Review Settings
Quality Review Status

📄 Duplicate

➕ Add
✎ Edit
🔇 Disable
🔒 Complete
🗑️ Delete

📄 Publish Documents

12 Audits 1 Selected

	Name	Status	Description	Frequency
▶	2021 Full Audit Review	ACTIVE	Full audit of all submitted docum	
▶	December 2021 Full Audit Review	ACTIVE	Review of all submitted docum	



You may also duplicate an existing audit as an alternative to creating a new one. Doing so will retain all of the master's audit settings (including selected auditors) except for documents selection.

Documents Quality Review Settings
Quality Review Status

📄 Duplicate

➕ Add
✎ Edit
🔇 Disable
🔒 Complete
🗑️ Delete
📄 Publish Documents