

How to Reassign Documents as Audit Manager

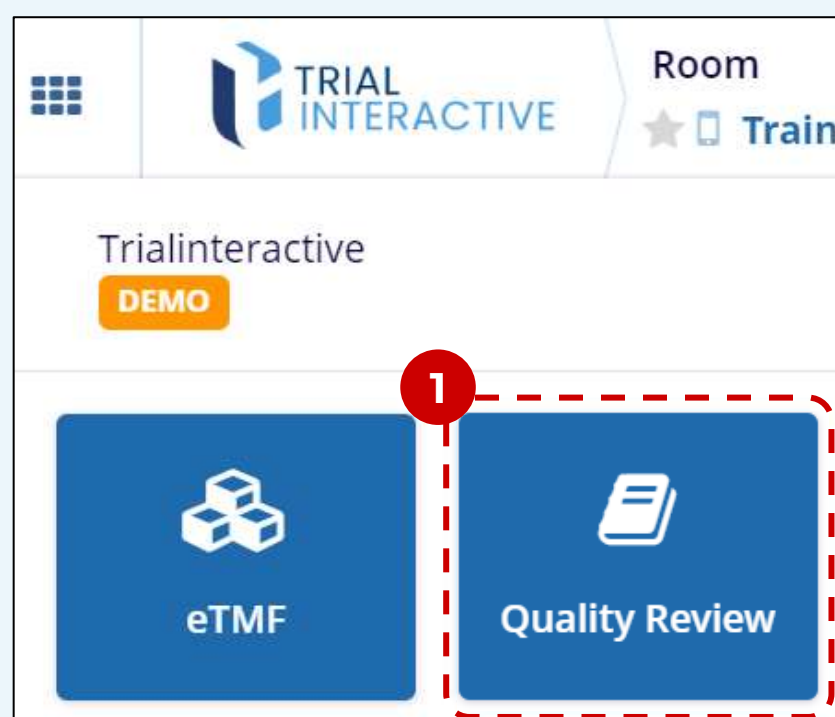
TI version 10.8

APPLICABLE TO:

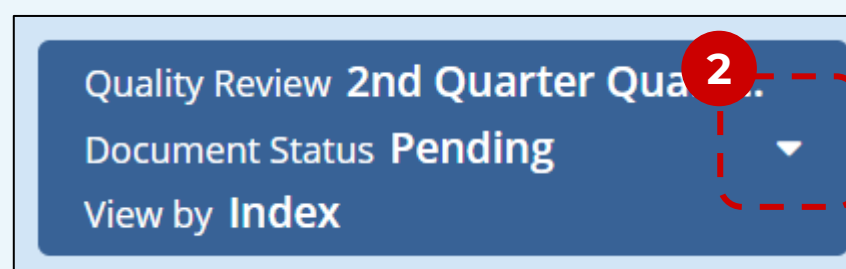
- Admin
- Manager
- Editor
- Reader
- eTMF
- Collaborate

Audit Findings are created when a document receives a Failed status during an audit. Findings are then 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.

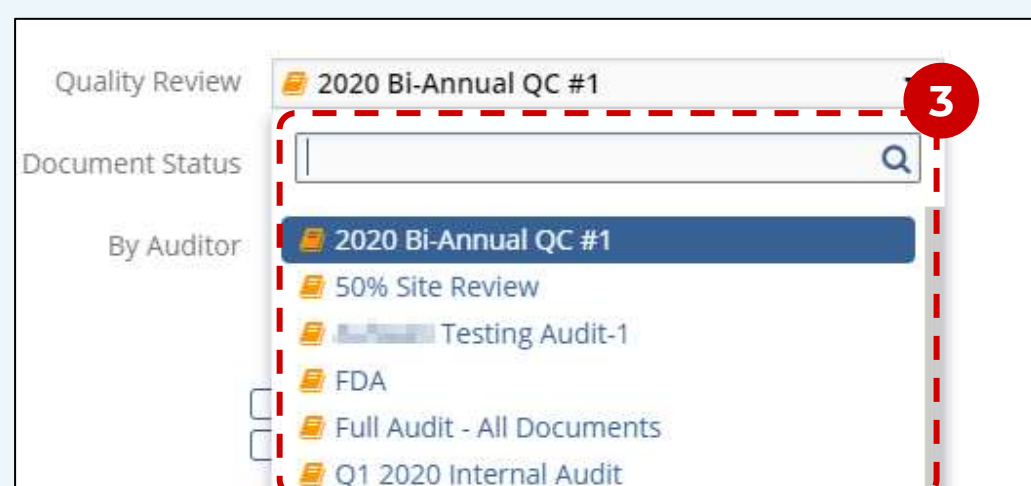
- 1 Access the **Quality Review** module in the chosen room.



- 2 Enter the view selector to pick an **Audit** (names shown are examples).



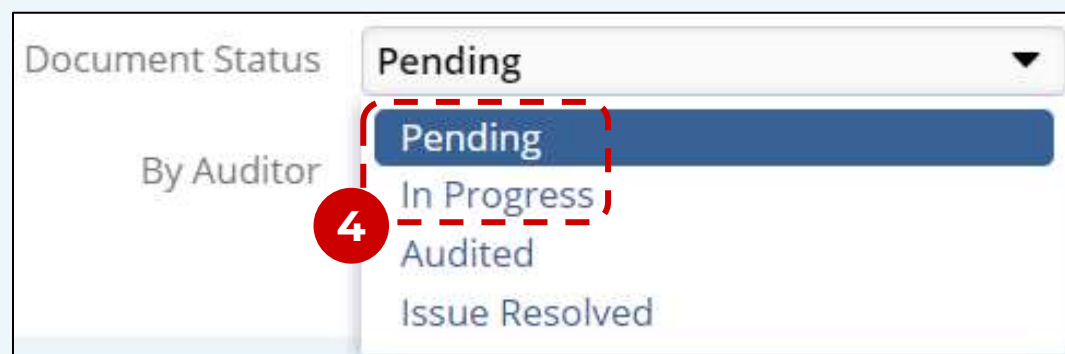
- 3 Select one of the available **Quality Reviews** (marked in orange). Or, type to search within the list.



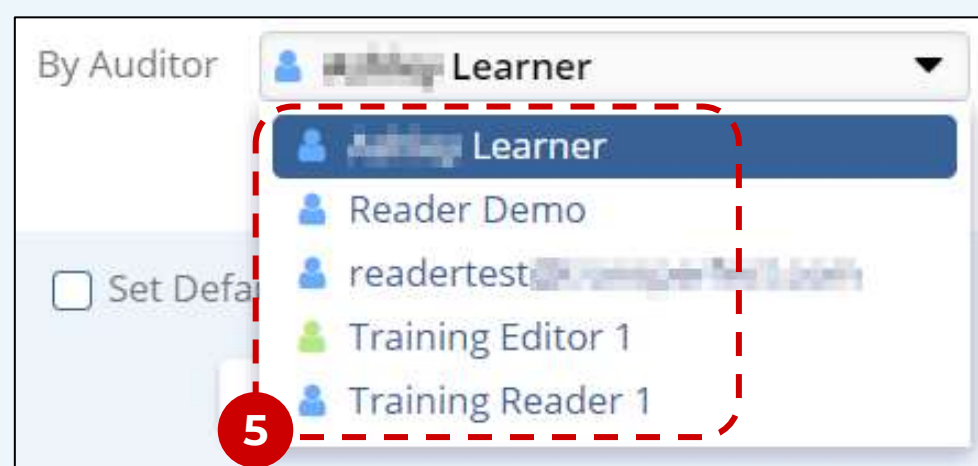
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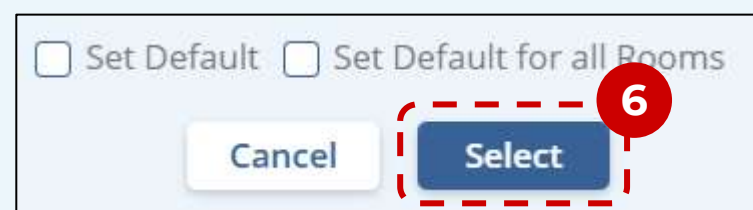
4 Select a Document Status of **Pending** or **In Progress**.



5 In the By Auditor dropdown, select a user that documents are currently assigned to.



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



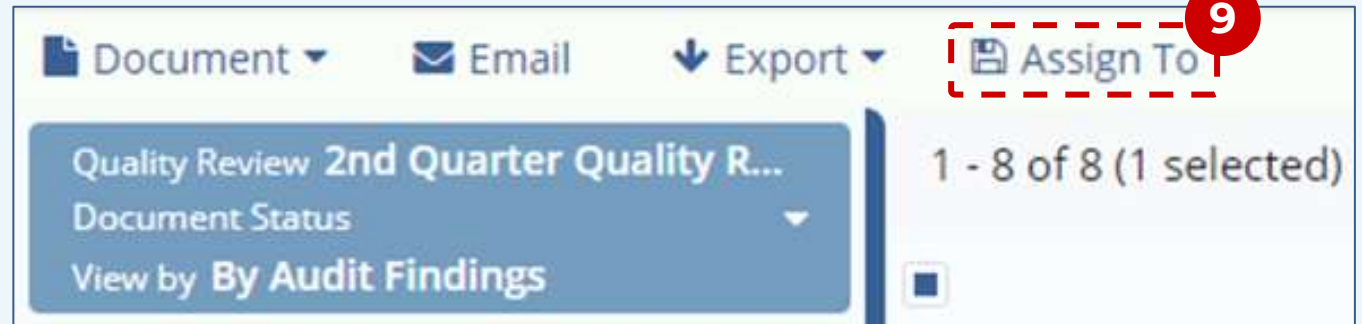
7 Select a **folder** to view eligible documents.



8 Select one or more documents.



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



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.

