

How to Duplicate an Audit

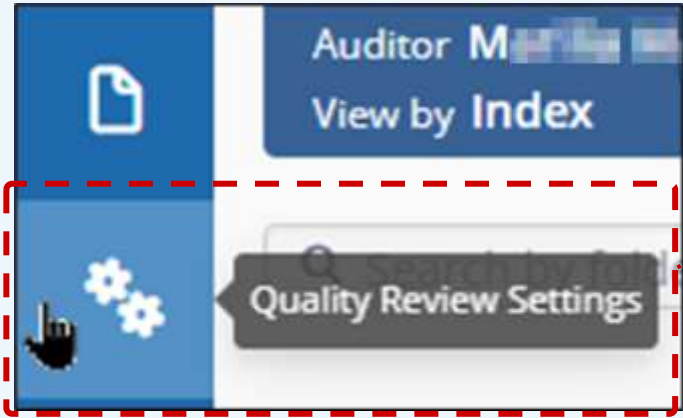
TI version 10.8

APPLICABLE TO:

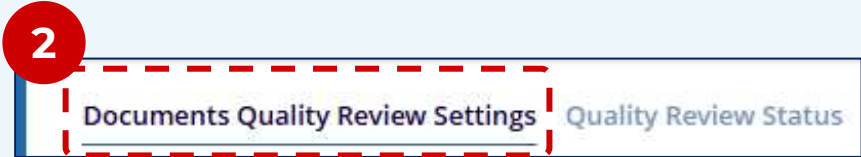
- ☒ Admin
- ☐ Manager
- ☐ Editor
- ☐ Reader
- ☒ eTMF
- ☒ Collaborate

Duplicating audits allows an Admin user to create clones of existing audits with most of the settings already in place, thus saving time when creating recurring audit profiles. It may also help when an audit needs replacing due to incorrect or obsolete settings.

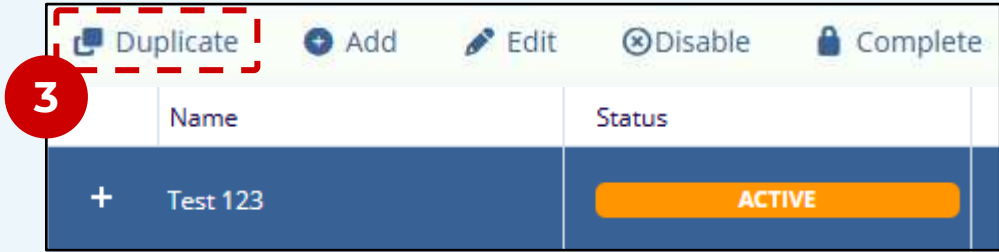
- 1
- Navigate to the **Quality Review module** and access the **Quality Review Settings** from the toolbar at the left side of the screen.



- 2
- Click on the **Documents Quality Review Settings** tab to view existing audits.

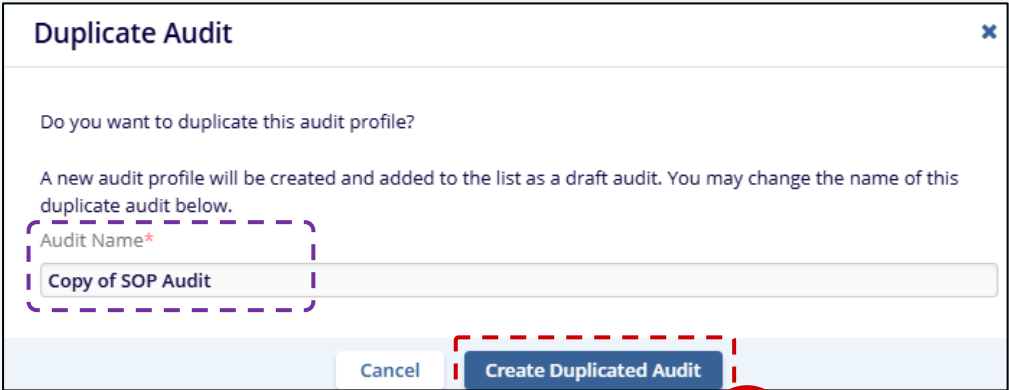


- 3
- Select the audit you wish to clone by clicking on its name. Click on the **Duplicate** button in the top bar.



Duplicate audits will retain all details of the original, including selected auditors and other users, except for the documents scope selection which will use default values. All settings will be editable.

4 A confirmation prompt appears. You can assign a name to the new copy of the audit here. Click **Create Duplicated Audit** to generate the duplicate.



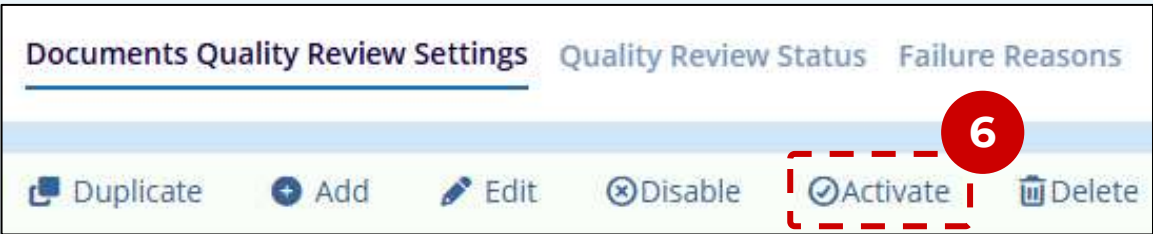
5 The clone audit will appear at the bottom of the audits list as a **Draft**. Double-clicking the new entry to open **Edit** mode and set up the new audit. The settings editor is the same as seen when creating an audit.

2 Audits 0 Selected

	Name	Status
+	Test 123	ACTIVE
+	Copy of Test 123	DRAFT

For information on settings up audits, see the Online Guide or the “How to Create an Audit” job aid.

6 When you’re ready for the new Audit profile to be used for review, simply click on the **Activate** button. Its assigned documents can now be reviewed by auditors



Documents Quality Review Settings		Quality Review Status	Failure Reasons		
Duplicate	Add	Edit	Disable	Activate	Delete