

Audit manager: Front end overview

Archived

Please read this article for the steps ahead of this stage of the process.

Introduction to the front-end

Now that you have built the clauses and question sets for the standard and audit you wish to run, you can navigate to the front end of the Application.


The screenshot shows the Claromentis Audit Manager interface. At the top is a pink header with the 'claromentis' logo, a search bar with the text 'What are you looking for?', and a clock showing '03:38'. Below the header is a navigation bar with links: HOME, COMPANY, DEPARTMENT, FORMS, LEARNING, PROJECTS, SUMMER EVENT, BOOK A PERSONALISED DEMO, and LEARN MORE. The main content area is titled 'Audit Manager' and includes a '+ New audit' button. A calendar view for 2019 is displayed, showing months from January to September. On the right side, there is a sidebar with sections for Search, My Actions, Stats, and a list of audit stages: No of Audits, PLANNED, PROPOSED, and ACCEPTED.

You will see a calendar - this displays all the audits you are running throughout the year.

It is typical to break an audit for a particular standard up into monthly chunks across the year so that by the time your audit is due in January, each clause has been addressed in manageable chunks.

Audits can also be in different stages - these are denoted on the right-hand side.

The colours here will help you identify which audits are in which stage across the calendar view.

You will also see  button - provided an administrator for Audit Manager has enabled these permissions for you.

Next to this, you have the following buttons:



List view: Here you can search and view all of the audits you have scheduled at any stage of the process. This can be helpful as a filtering tool when there are a lot of standards and audits in each stage of the process.

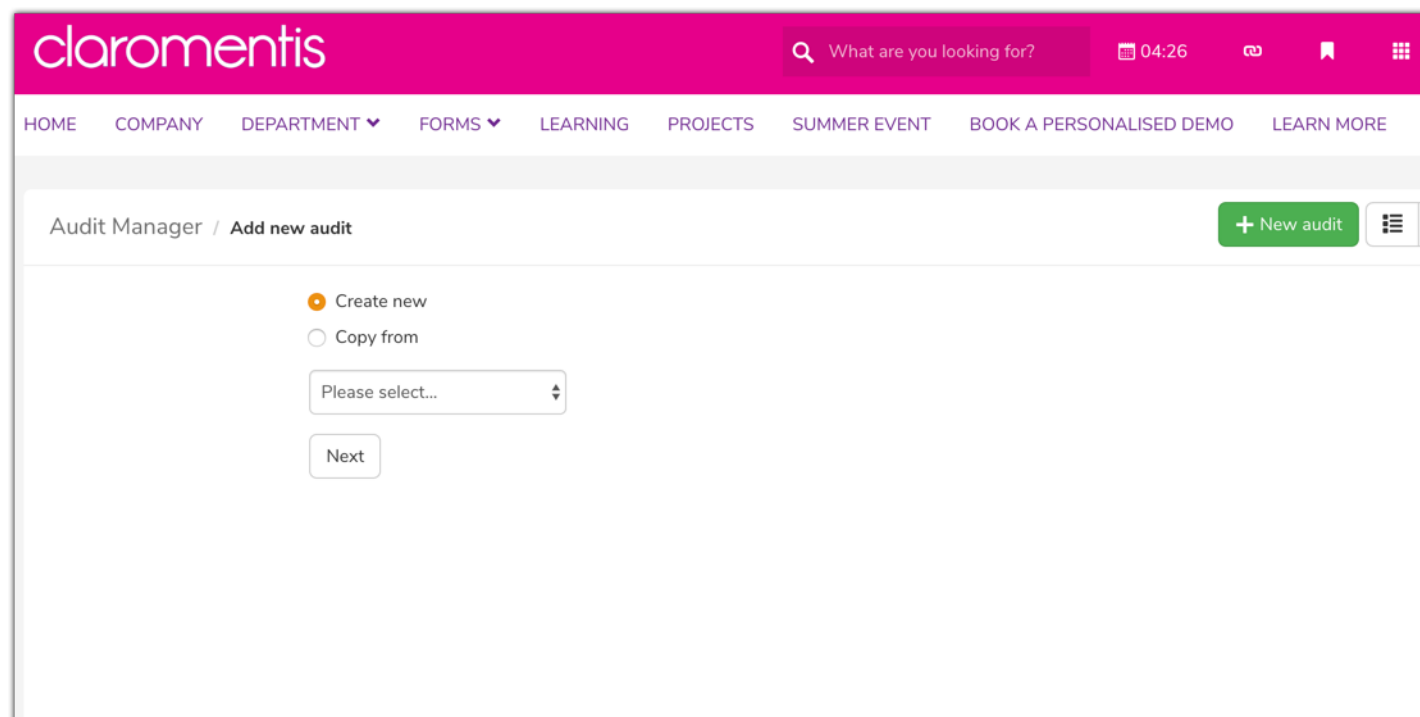
Actions: When an audit is 'In progress,' you will be able to assign users tasks and actions so you can successfully answer the questions that enable you to meet a clause. Choosing this option displays all the actions that have been assigned to you so you can keep track of and manage them.

Question sets: Here you will find a list of the question sets that have been built out on the admin side of the application for each clause.

Clauses: Here you will find a list of the clauses for each standard that have been added via the admin side of the application.

Adding an audit

Clicking the 'New Audit' button will bring up this page:

A screenshot of the 'Add new audit' page in the Claromentis application. The top navigation bar is pink and contains the 'claromentis' logo, a search bar with the placeholder 'What are you looking for?', and several icons including a calendar showing '04:26', a share icon, a bookmark icon, and a grid icon. Below the navigation bar is a horizontal menu with links: HOME, COMPANY, DEPARTMENT (with a dropdown arrow), FORMS (with a dropdown arrow), LEARNING, PROJECTS, SUMMER EVENT, BOOK A PERSONALISED DEMO, and LEARN MORE. The main content area has a header 'Audit Manager / Add new audit' on the left and a green '+ New audit' button with a list icon on the right. The main form area contains two radio buttons: 'Create new' (selected) and 'Copy from'. Below the radio buttons is a dropdown menu with the text 'Please select...' and a small up/down arrow. At the bottom of the form is a 'Next' button.

As mentioned earlier, it is typical to break the same audit into monthly (or weekly) chunks.

This 'Copy from' feature enables you to replicate the basis of your audit to save you from creating 12 identical ones for the same overall audit.

When creating fresh you will see this page:

Summary

Stage

PLANNED

Title *

Reference

Site *

Please select...

Actual date *

Date agreed with Auditee

Lead Auditor *

Select user ▼

Browse

Auditee *

Select user ▼

Browse

Description

Actions Metadata

Please select...

Responses Metadata

Please select...

Permissions

Start typing to add...

Browse

Remove

User: Claromentis Administrator

The title you may want to call the overall name of the standard e.g. 'Environmental Management' with the reference 'ISO 14001'.

You can select the date agreed with the auditor and factor in additional fields for metadata should you wish. You can also set more thorough permissions here for users who will need involvement.

When you click submit, you will next be able to select the group of questions you would like to allocate to this particular audit.

Perhaps it will be all the question sets or just some.

HOME

COMPANY

DEPARTMENT ▼

FORMS ▼

LEARNING

PROJECTS

SUMMER EVENT

BOOK A PERSONALISED DEMO

LEARN MORE

Audit Manager / Add new audit

+ New audit

Step 2 of 2

Question Sets

You can add Ad-hoc Questions once your Audit has been created.

Name

ISO 14001 - (4) Context

Type

HSE

Date Created

26 November 201

◀ Previous

Create Audit

Cancel

Finally, you will see the audit dashboard. The options available on this page will change depending on what stage the audit is in. You can adjust this by clicking here:

claromentis

What are you looking for?

07:41

HOMECOMPANYDEPARTMENT▼FORMS▼LEARNINGPROJECTSSUMMER EVENTBOOK A PERSONALISED DEMOLEARN MORE

Audit Manager / Audit Details

+ New audit

Environmental management AU00002

RefISO 14001

SiteDefault

Lead AuditorAbigail Clark

AuditeeMary Rees

StagePLANNED>

Changed byClaromentis Administrator

Last Modified26-11-2019 07:31

Edit properties

Response Progress0%

Actions Progress: 0 Actions (0 Verified)

SummaryQuestion SetsNotesHistory

Summary

Question Sets

ISO 14001 - (4) Context

When you reach the 'In progress' stage, you will have all the available options as follows:

Audit Manager / Audit Details

+ New audit

Environmental management AU00001

RefISO 14001

SiteDefault

Lead AuditorClaromentis Administrator

AuditeeClaromentis Administrator

StageIN PROGRESS>

Changed byClaromentis Administrator

Last Modified25-11-2019 02:53

Edit permissions

Response Progress0%

Actions Progress: 0 Actions (0 Verified)

SummaryQuestion SetsResponsesActionsNotesHistory

Summary: This shows the overall stats achieved, it will be explained further later on.

[Summary](#)
[Question Sets](#)
[Responses](#)
[Actions](#)
[Notes](#)
[History](#)

Summary

Total Score Achieved

0

Pass score

N/A

Percentage

N/A

No. of Responses

0

General comments

Auditee comments

Question Sets

4.1 Understand your organisation's particular context

Score

POSITIVE

0

PASS

0

OBSERVATION

0

MINOR NC

0

MAJOR NC

0

NOT ASKED

0

Actions

Remedial

0

Corrective

0

Preventive

0

Total

0

Question Sets: Here are the listed question sets you tied earlier to this audit. As the audit is now in progress, you can begin to score yourself against the questions. A numeric score is associated with the selection chosen in the top box - you can then assign a specific cause to the reason for scoring a 'Minor non-compliance'.

Response Progress 33%

Actions Progress: 0 Actions (0 Verified)

[Summary](#)
[Question Sets](#)
[Responses](#)
[Actions](#)

Question Sets / Question Set

4.1 Understand your organisation's particular context

Type HSE

No.	Question		
1	Question 1.....		
2	Question 2.....	PASS	+
3	Question 3		+

Add/Edit Response

Score

MINOR NC

Commentary

Root Cause

Please select...

Submit

Responses: Here is the summary of the responses to the questions

Summary Question Sets Responses Actions Notes History						
All Audit Responses						
ID	Response	Type	Root Cause	No. Actions	Date Created	Created by
1		PASS		-	26-11-2019 08:08	Claromentis Administrator
2		PASS		-	26-11-2019 08:08	Claromentis Administrator
3		MINOR NC	Lack of Resources	-	26-11-2019 08:09	Claromentis Administrator
4		POSITIVE		-	26-11-2019 08:09	Claromentis Administrator

Actions: Back in the question sets tab, you can add actions to questions you may have been unable to give a 'Pass' or 'Positive' status to.

claromentis

What are you looking for?

08:21

Response Progress

SummaryQuestion SetsResponsesActions

4.1 Understand your organisation's particular context / Q

2 Question 2.....

Clause Reference 4.1 - 4.1 Understand your organisation'

Responses

ID	Response
1	

Add/Edit Action

Description *

Order the required resources to complete this item

Type

Corrective

Associated Procedure

Recipient

Select user

Browse

Line Manager

Select user

Browse

Verifier

Select user

Browse

Due Date

26-11-2019

Submit

ed

Created by

08:09

Claromentis Administrator

Here you can assign these actions to people to ensure the non-compliance is addressed. They are shown as follows in the 'Actions' tab:

SummaryQuestion SetsResponsesActionsNotesHistory

All Audit Actions

ID	Action	Type	Due Date	Stage	Recipient	Verifier	Created by
1	Order the required resources to complete this item	Corrective	26 November 2019	OPEN			Claromentis Administrator

Notes: Anyone involved in the audit can leave updates or notes here for everyone to see.

History: This keeps a track of all the changes made to the audit

The summary page explained:

SummaryQuestion SetsResponsesActionsNotesHistory

Summary

Total Score Achieved24

Pass score28

Percentage85%

No. of Responses4

General comments

Auditee comments

Question Sets

4.1 Understand your organisation's particular context

Score

POSITIVE1

PASS2

OBSERVATION0

MINOR NC1

MAJOR NC0

NOT ASKED0

Actions

Remedial0

Corrective1

Preventive0

Total1

The summary section here gives the score. The 'Score' section is essentially a count of all the questions which are in each of the scoring categories.

Closing an audit

The final stage in the audit process is 'Closed'. You will only be able to progress to this stage when all actions have been completed by their nominated user, and verified by their selected line manager.

Audit Manager / Audit Details

+ New audit

Environmental management AU00002

RefISO 14001

SiteDefault

Lead AuditorAbigail Clark

AuditeeMary Rees

StageCLOSED

Changed byClaromentis Administrator

Last Modified27-11-2019 01:29

Edit permissions

Response Progress100%

Actions Progress: 0 Actions (0 Verified)

SummaryQuestion SetsResponsesActionsNotesHistory

Summary

Total Score Achieved34

Pass score28

Question Sets

ISO 14001 - (4) Context

Score

Actions

