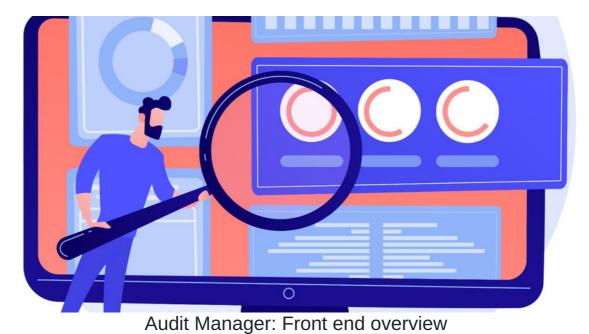
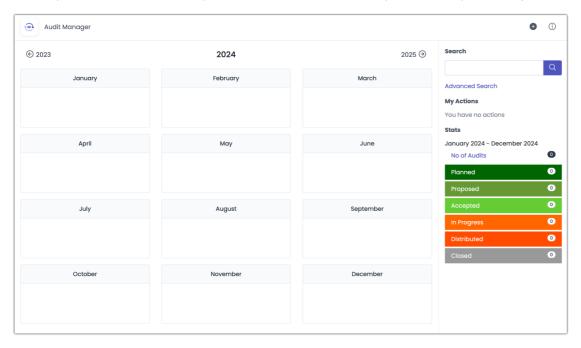
Link to article: https://discover.claromentis.com/knowledgebase/articles/969/audit-manager-front-end-overview



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.



You will see a calendar that 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.



Next to this, under the 3 dots button are the following areas:



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

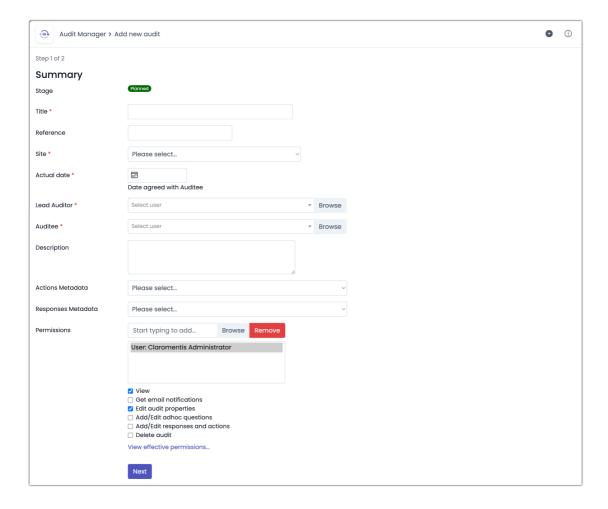
Clicking the 'New Audit' button will bring up this page:



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:

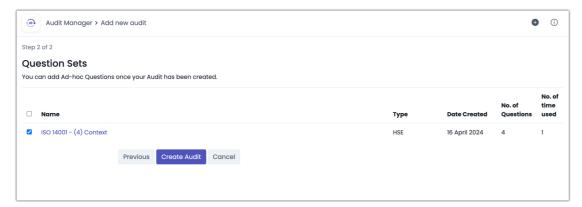


The title you may want to call the overall name of the standard e.g. 'Environmental Management' with the reference 'ISO 14001'.

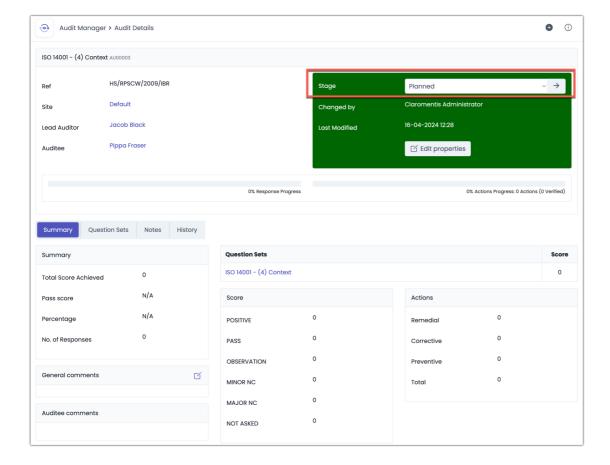
You can select the date agreed with the auditor and factor in additional fields for metadata should you wish. You can also set more thorough permissions here for users who will need involvement.

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

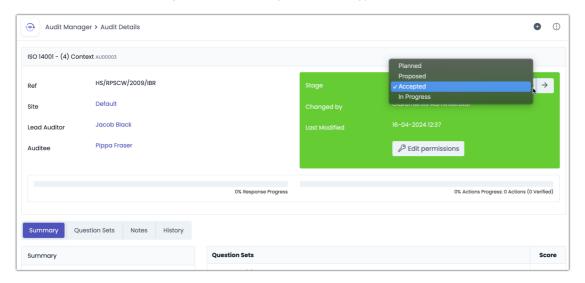
Perhaps it will be all the question sets or just some.



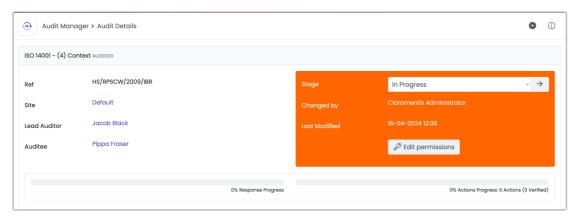
Finally, you will see the audit dashboard. The options available on this page will change depending on what stage the audit is in. You can adjust this by clicking here:



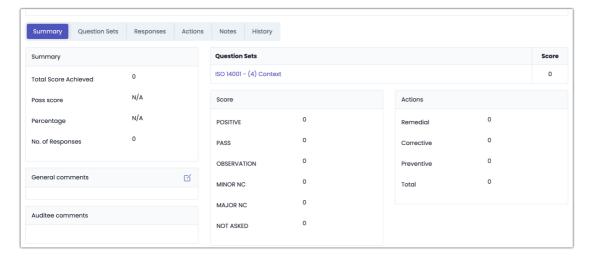
An audit needs to be moved through each status manually for the next to appear as selectable:



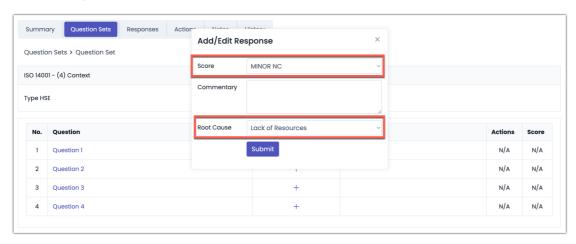
When you reach the 'In progress' stage, you will have all the available options as follows:



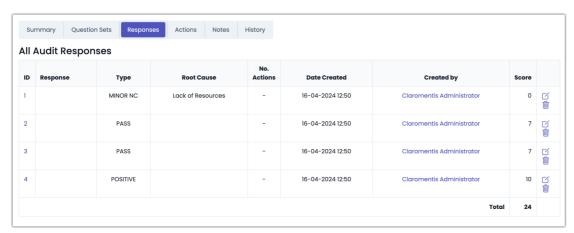
Summary: This shows the overall stats achieved, it will be explained further later on.



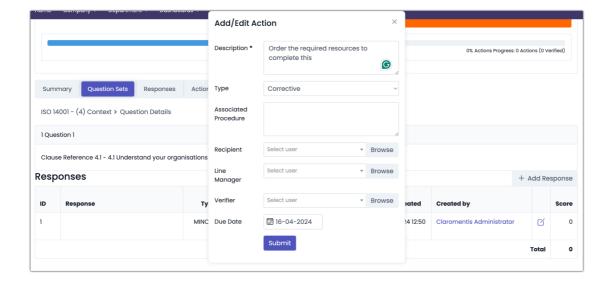
Question Sets: Here are the listed question sets you tied earlier to this audit. As the audit is now in progress, you can begin to score yourself against the questions. A numeric score is associated with the selection chosen in the top box - you can then assign a specific cause to the reason for scoring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



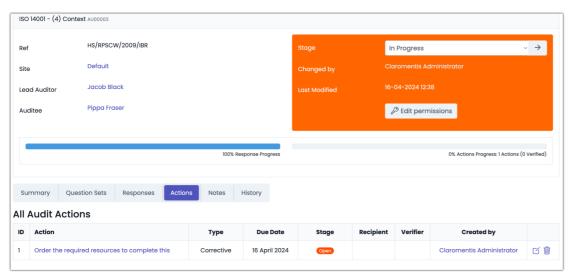
Responses: Here is the summary of the responses to the questions



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.



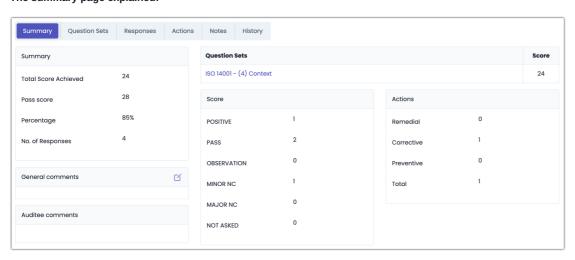
Here you can assign these actions to people to ensure the non-compliance is addressed. They are shown as follows in the 'Actions' tab:



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

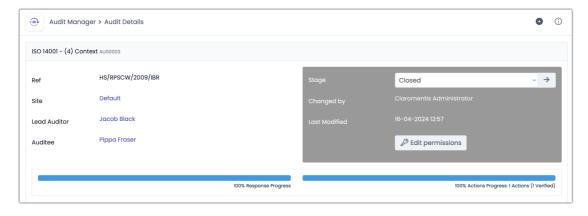
History: This keeps track of all the changes made to the audit

The summary page explained:



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.

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.



Created on 16 April 2024 by Hannah Door. Last modified on 6 November 2025 Tags: audit, compliance, ISO, v9