

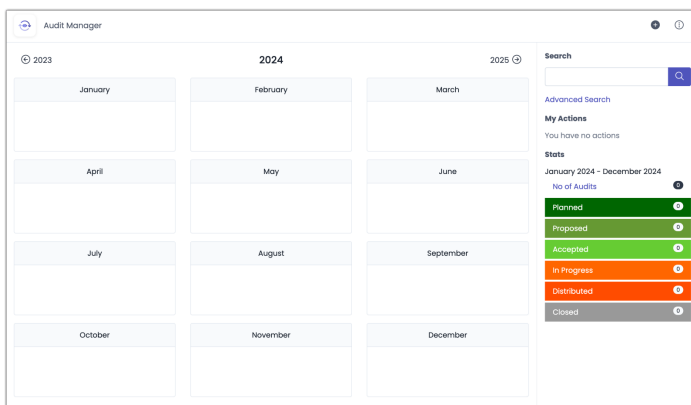


## Audit Manager: Front end overview

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.



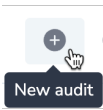
You will see a calendar that displays all the audits you are running throughout the year.

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.

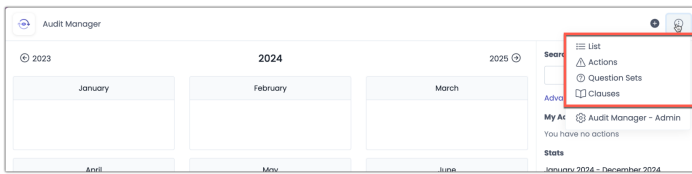
Audits can also be in different stages - these are denoted on the right-hand side.

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

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



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.

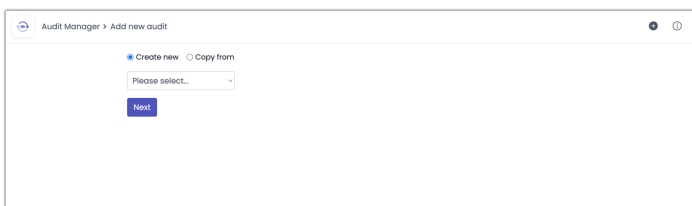
**Actions:** When an audit is 'In progress,' you will be able to assign users tasks and actions so you can successfully answer the questions that enable you to meet a clause. Choosing this option displays all the actions that have been assigned to you so you can keep track of and manage them.

**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.

Audit Manager > Add new audit

Step 2 of 2

Question Sets

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

Name	Type	Date Created	No. of Questions	No. of time used
<input checked="" type="checkbox"/> ISO 14001 - (4) Context	HSE	16 April 2024	4	1

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:

Audit Manager > Audit Details

ISO 14001 - (4) Context AU00003

RefHS/SPSCW/2009/BR

SiteDefault

Lead AuditorJacob Black

AuditeePippa Fraser

StagePlanned

Changed byClaroments Administrator

Last Modified16-04-2024 12:28

Edit properties

0% Response Progress

0% Actions Progress 0 Actions (0 Verified)

Summary

Question Sets

Notes

History

Summary

Total Score Achieved0

Pass scoreN/A

PercentageN/A

No. of Responses0

General comments

Auditee comments

Question Sets

ISO 14001 - (4) Context

Score

POSITIVE0

PASS0

OBSERVATION0

MINOR NC0

MAJOR NC0

NOT ASKED0

Score0

Actions

Remedial0

Corrective0

Preventive0

Total0

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

Audit Manager > Audit Details

ISO 14001 - (4) Context AU00003

RefHS/SPSCW/2009/BR

SiteDefault

Lead AuditorJacob Black

AuditeePippa Fraser

StagePlanned

Changed byClaroments Administrator

Last Modified16-04-2024 12:37

Edit permissions

0% Response Progress

0% Actions Progress 0 Actions (0 Verified)

Summary

Question Sets

Notes

History

Summary

Question Sets

Score

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

Audit Manager > Audit Details

ISO 14001 - (4) Context AU00003

RefHS/SPSCW/2009/BR

SiteDefault

Lead AuditorJacob Black

AuditeePippa Fraser

StageIn Progress

Changed byClaroments Administrator

Last Modified16-04-2024 12:38

Edit permissions

0% Response Progress

0% Actions Progress 0 Actions (0 Verified)

Summary

Question Sets

Notes

History

Summary

Question Sets

Score

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



**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:

Summary				Question Sets		Score
Total Score Achieved				ISO 14001 - (4) Context		24
Pass score				Score		
Percentage				POSITIVE	1	
No. of Responses				PASS	2	
				OBSERVATION	0	
				MINOR NC	1	
				MAJOR NC	0	
				NOT ASKED	0	
General comments				Actions		
				Remedial	0	
				Corrective	1	
				Preventive	0	
				Total	1	
Auditee comments						

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			
ISO 14001 - (4) Context AU00003			
Ref	HS/RPSCW/2009/BR	Stage	
Site	Default	Closed	
Lead Auditor	Jacob Black	Changed by	Clara Morris Administrator
Auditee	Pippa Fraser	Last Modified	16-04-2024 12:57
		Edit permissions	
100% Response Progress		100% Actions Progress: 1 Actions (1 Verified)	

Created on 16 April 2024 by [Hannah Door](#)

Tags: [audit](#), [compliance](#), [ISO](#), [v9](#)