Conducting an Audit

There are **two types** of **Audits** which can be conducted, a **scheduled audit** and a **AdHoc Audit**.

A **Scheduled Audit** is a audit which has been **set up for you** to conduct by a **certain date** and will appear in your **Schedule List**.

AdHoc Audits are **audits** which can be **conducted at anytime** from your **New Assessments List**.If you wish to conduct a **AdHoc Audit** you must **select** the **Site and Department** you wish to conduct it on.

Select the **start** beside the **Audit** you **wish to conduct**.

This is the view you will be greeted with, I will now go through the different aspects of an Audit.

Observations

Observations are **text fields** which you can **add extra details** to, or if the Audit is **unscored** where you will **answer the Requirement**.

Input Fields

Date field – A Date Field once clicked on will pop up with a modal like the one below and will allow you to select the appropriate date.

Number fields – A number Field is just like a text field but will only allow numbers to be entered in it.The label should make it clear that it is looking for a number answer and not a text one.

Text fields – Text Fields are basically additional observation fields, these can be called any thing from the name of a package to the location of a building.

Non-conformances

Non-Conformance can be raised **manually** or **automatically**. If you wish to create one manually simply select the "**Add Non-Conformance**" button.

The automatic way happens when you **answer the requirement** a **Non-Conformance** form may **pop-up**, this means that you have been **suggested to create a Non-Conformance**.

Adding Attachments

If you wish to **add attachments** to the **Requirement** you can do so by selecting the "**Add Attachment**" button. Once selected your **computer's file manager** should appear, then you simply **select the image you wish to add**.

Custom Options

There are also **custom options** which are basically **additional scoring schemes** which can be add **per Requirement** or across the **whole template**.

The will look like this and will **display in a dropdown**, you simply select the dropdown box and then **select the option** you want to choose.

Recommendations

If this is enabled on your org then you can also **add a recommendation** to the subject of that **requirement**.

So in this case your **recommendation** could be that you believe we should look into becoming a paperfree company.

Mandatory Fields

Some **fields** may be **Mandatory** when you're conducting Audits. These fields **must be filled out** with the appropriate data in order to **submit the Audit**.

When you go through the **Audits** you shall see a **red label** beside the **requirement number**, informing you if there are any **mandatory elements**. The **Scores**, **Observations**, **Attachments** and **Input Fields** can all be Mandatory.

If these **fields** are not entered when the **Audit** is submitted there will be a **red highlight** around the elements which **need to be filled out**.