AuditForm User Guide

Author: Paul Beck

Dated: 22nd July 2024

Correlates to AuditForm App Version 2.1.79 and higher

Contents

1 Introduction

An automated process of collecting audits is a more efficient way of using auditors' time, allowing them to spend more time on conducting audits and dealing with non-compliances and spending less time on the administrative tasks traditionally surrounding the auditing activity.

The AuditForm System is a web and remote device-based application that enables auditors to build and run audits over the Internet through their web browser or using one of the following handheld platforms:

- Apple iOS (iPhones / iPads)
- Most Android (Phones / Tablets)

Non-compliances found in an audit are tracked until they are resolved. Audits are scored once published and location/site performances can then be compared. Audits are emailed to the various interested parties (specified by the auditor).

The online AuditForm management information software allows audit performance to be monitored and managed.

Field trials have demonstrated that data capture using this method saves an auditor up to 2 days a week when compared with manual methods of capturing and inputting the same data.

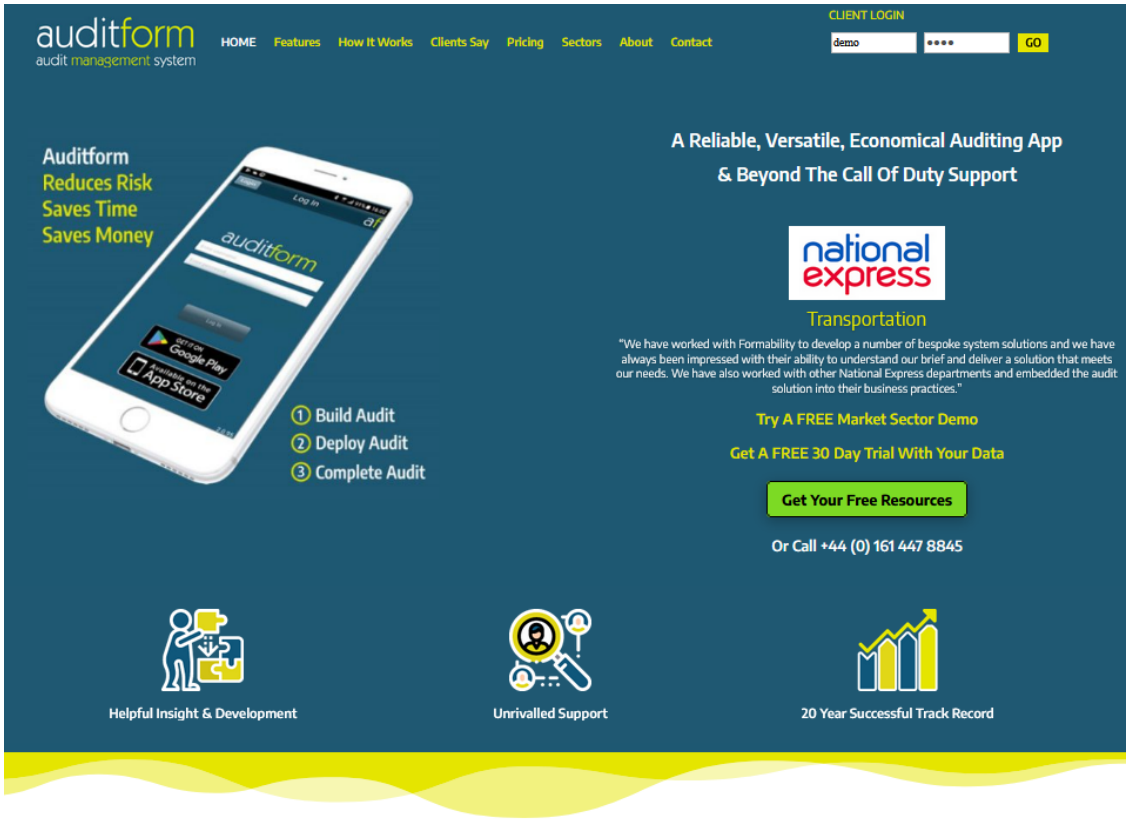
Since the original launch in 2010, the system has grown to encompass more time saving functionality as well as becoming a valuable risk management tool used internationally.

This document describes the standard AuditForm functionality. On the web site buttons are useful in clarifying what each option means.

Note: Do not feel restricted by the naming conventions used to describe features in the system, as the language module allows you to describe features in your own terminology.

2 System Login and Dashboard Landing Page

Access to the system and organisation levels is flexible, so what is shown to the logged-on user depends on the access given to said user.



An Auditing App for External Auditing, Internal Audit & Quality Inspection Software
How Do Auditing Apps Work?

The system is accessed from the web site https://www.auditform.com/ which is a secure site. Users are given their own unique login name and password. The demonstration area has a username and password set to 'demo'. This area is refreshed every night.

Each user will be given a username and password by the administrator that will give them appropriate access to the system.

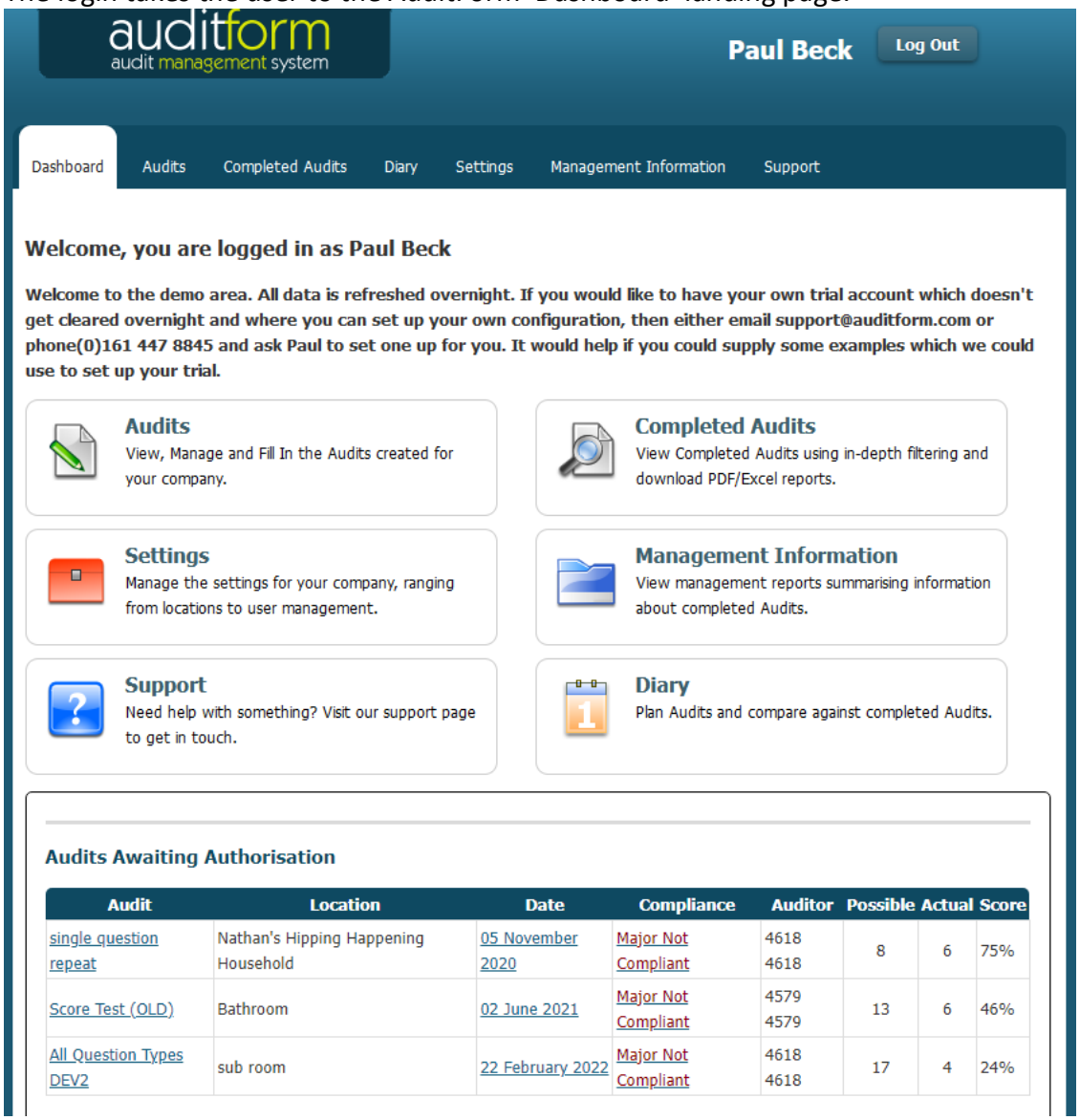
The System Administrator administers this authentication process.

The username is not case sensitive; however, the password is case sensitive.

The 'Usernames' and 'Passwords' are managed by the System Administrator in the Settings pages.

2.1 Dashboard Page Navigation

The login takes the user to the AuditForm 'Dashboard' landing page.



The user can navigate the system using the screen option or through the use of the system tabs at the top of the screen.

As the user navigates deeper into the site, they will be able to use the 'Breadcrumbs' at the top of the screen for quick navigation back to an earlier point of their current drill e.g., 'Audits > Health & Safety Audit > Audit Settings'. By clicking on 'Audits' or 'Health & Safety Audit', the user will be taken back to that screen on the site.

The 'Audits' option enables you to build the audits you are completing as well as giving the option to fill-in audits on the web.

The 'Completed Audits' Option allows you to review audits that have been filled in and to address non-compliances.

The 'Settings' Option allows you to manage your audit environment.

The 'Management Information' option gives management an overview of audit performance across locations.

The 'Support' option puts you in touch with our friendly helpdesk where we will help you with any issues that you may have. It gives you a number to call the helpdesk, and also provides text boxes so one can fill in their name, email, what they want to say, and a tab to submit it to the help desk.

The 'Diary' option gives you the ability to 'Plan Audits` and compare these planned audits against 'Completed Audits'.

Further information and elaboration on most of these will be given later in this guide.

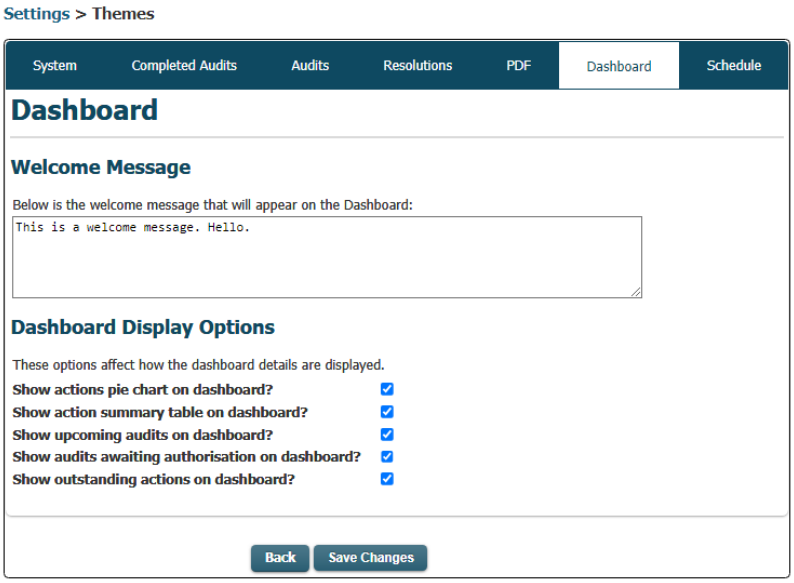
2.2 Dashboard Page Information

Other than the ability to navigate quickly about the system, there are a few other features on the 'Dashboard' page.
Firstly, if the user has any upcoming audits, it will tell said user about them.

Secondly, if the user is capable of it, it tells them about Audits that are awaiting their authorisation.

Thirdly, it tells the user of any outstanding actions that need looking at that they have the permissions to handle.

The information shown is relevant to the logged in person.
The dashboard display options available are:

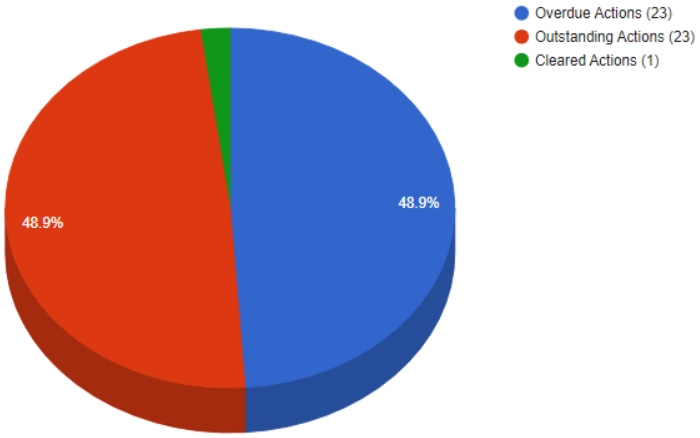


The information for these options when turned on will look like this:

Audits Awaiting Authorisation

Audit	Location	Date	Compliance	Auditor	Possible	Actual	Score
single question repeat	Nathan's Hipping Happening Household	05 November 2020	Major Not Compliant		8	6	75%
Score Test (OLD)	Bathroom	02 June 2021	Major Not Compliant		13	6	46%
All Question Types DEV2	sub room	22 February 2022	Major Not Compliant		17	4	24%

Audit Actions Pie Chart (Raised by you or for you in the last 12 months)



Actions Summary Table (Raised by you or for you in the last 12 months)

Overdue	Outstanding	Cleared Actions	Awaiting Authorisation
23	23	1	0

Outstanding Actions (Raised by you or for you)

23 Outstanding Actions

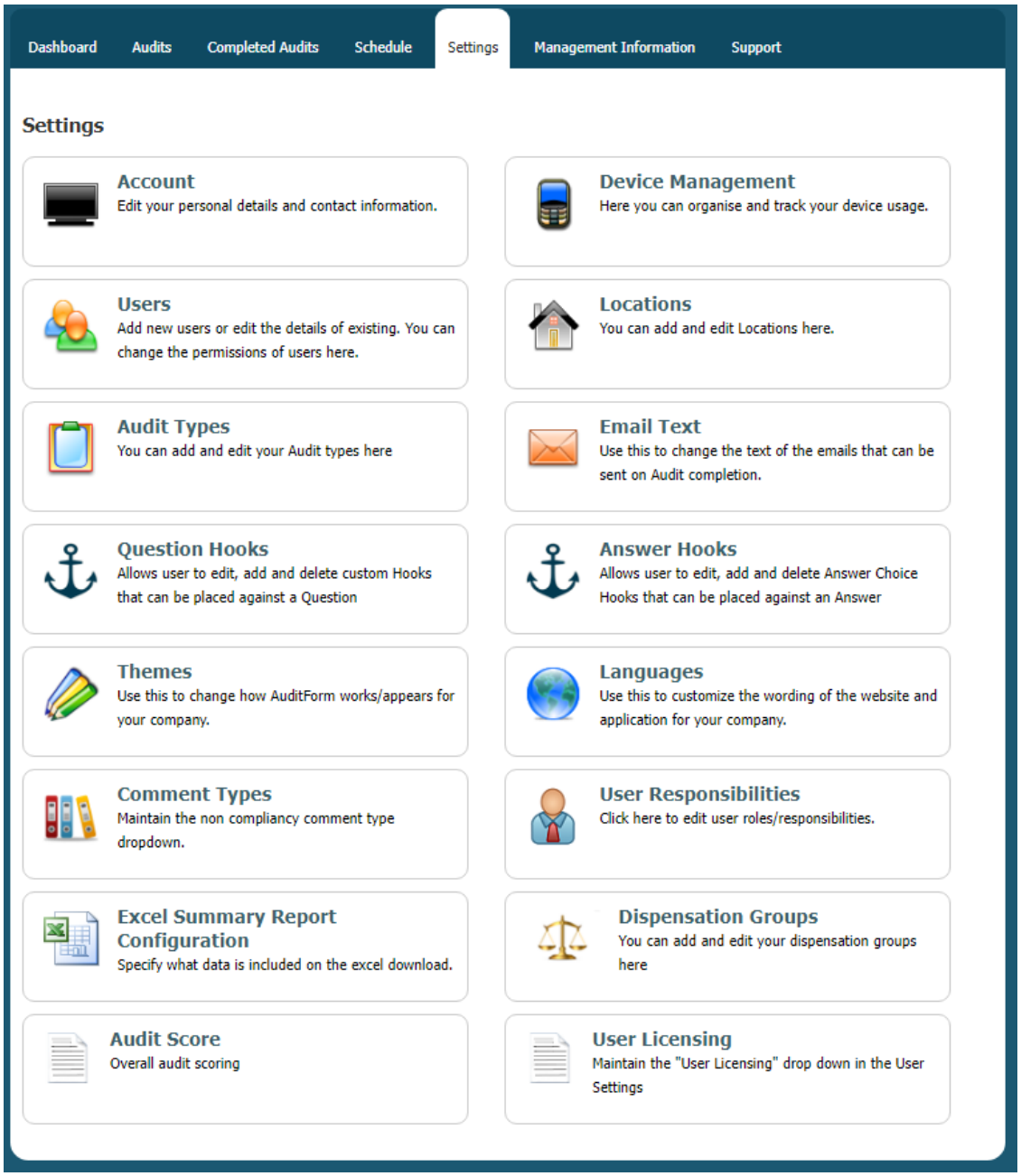
Location	Question	Answer	Action By	Action Required	Audit Date	Due Date	Actions
Bathroom	Ref#: 145780 Audit: Conditional Audit (Paul Test) Do you like cheese Grommit?...	No		Potatoes are better	14 July 2023		Resolve Compliancy
Front Room	Ref#: 145781 Audit: 2. Large Repeating sections audit Q2...	2		Repeat 1	20 July 2023		Resolve Compliancy
Front Room	Ref#: 145781 Audit: 2. Large Repeating sections audit Q1 edit...	1 ed		Hello 2	20 July 2023		Resolve Compliancy

The user is able to drill down into these options to see more information by clicking on the pie chart and associated tables.

The primary goal of a dashboard is to show the logged-in user at a glance what needs to be done. So, if there were actions to be addressed, the user can go straight to the identified activity.

3 Settings

The 'Settings' screen can be accessed from the menu bar at the top of the screen or from the 'Dashboard' page. Here the administrator can maintain the audit environment.



3.1 Account Settings

The 'Account' settings are a subset of the 'Users' screen so that a user can manage their own details. The username cannot be changed and the password setup may need to be a strong password if required in the 'Themes' settings.

3.2 Device Management Settings

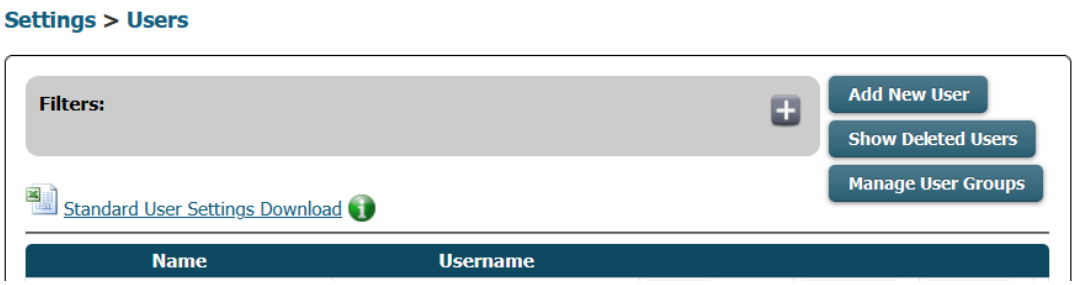
The 'Device Management' settings are useful to see the mobile device activity. It will show for each device in place, when the Last sync was carried out, the user and the device's ID where it is known.

3.3 Users Settings

Click on 'Users' on the Settings page to view this page.

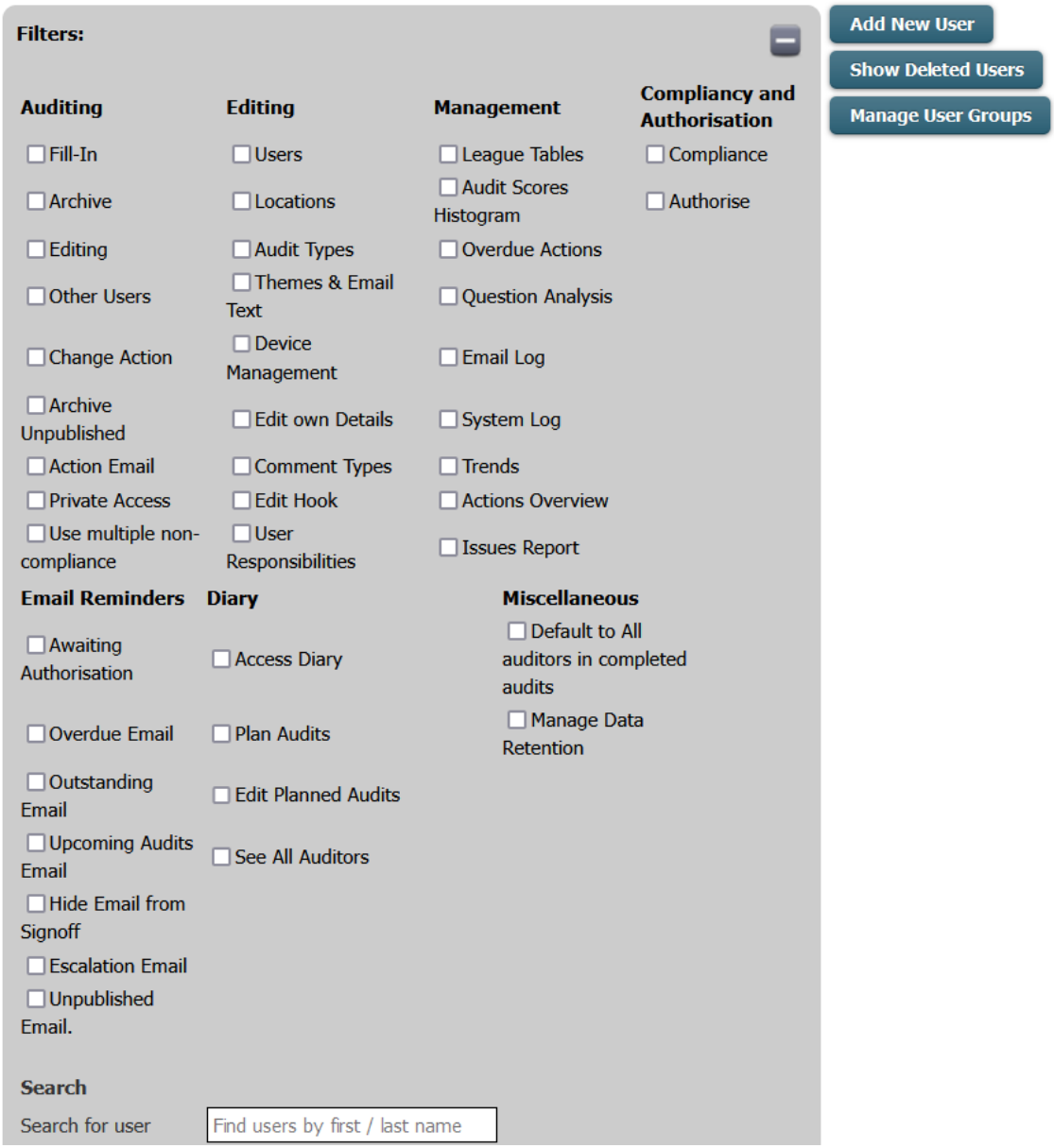
Here the administrator can edit the user attributes, decide which permissions a user may be granted and in what locations that user can operate in.

On selection of this screen a list of users is displayed. Click on 'Edit' for a given user to see the user details. The administrator can filter what users appear according to what they have to do and what they can do with auditing, settings and management and add new users by pressing the "Add New User" tab. An administrator can press delete which will archive the chosen user.



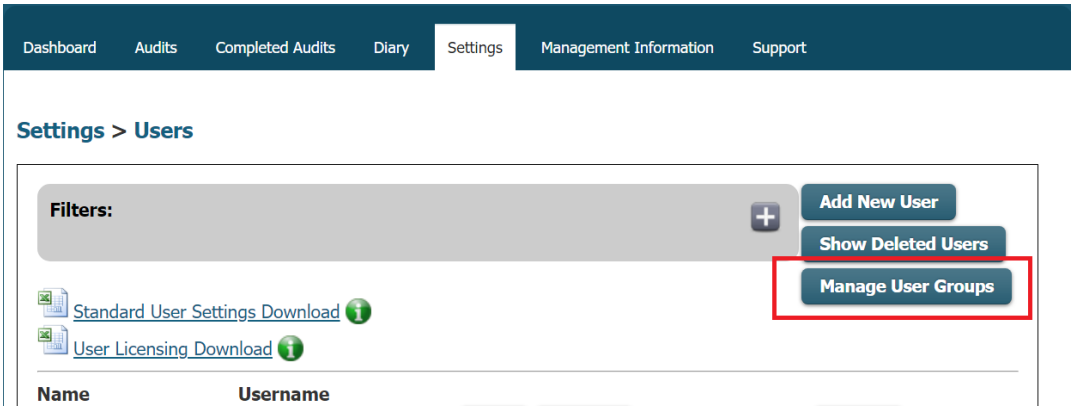
3.3.1 Search Box to Find Users by First / Last Name

This can be accessed by expanding the 'Filters' section on the ‘Settings > Users screen’.

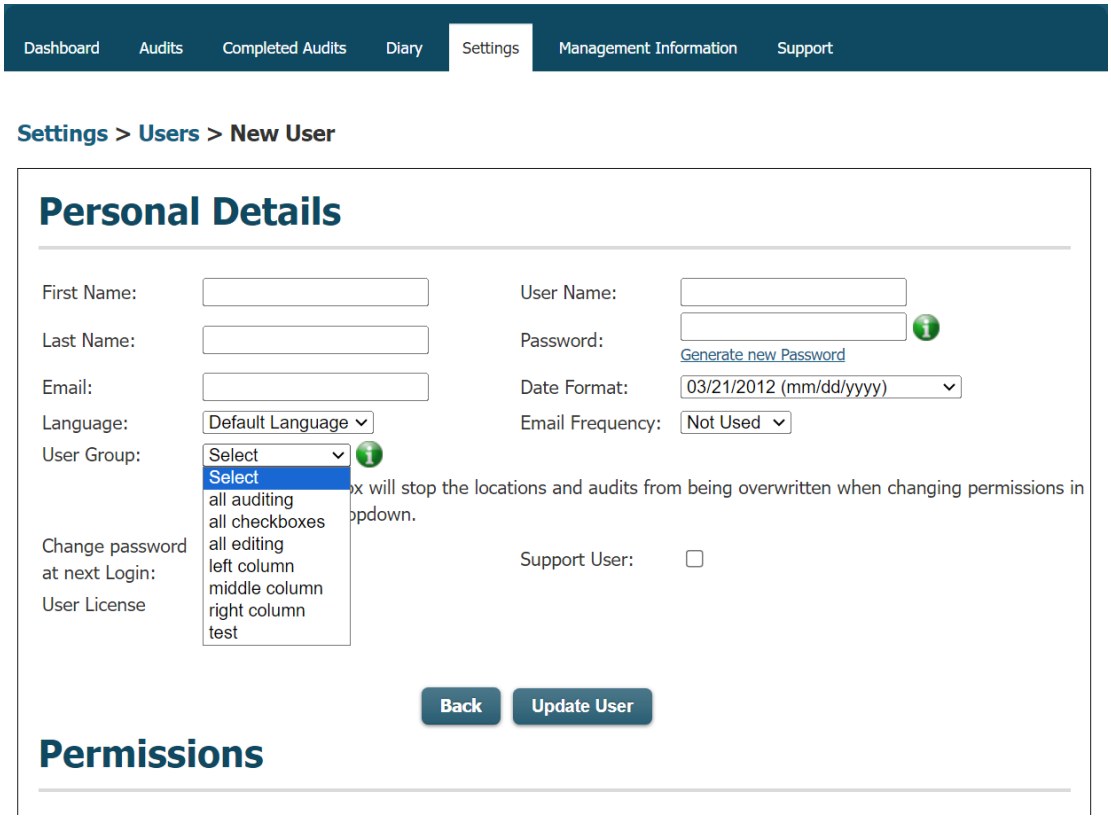


3.3.2 User Groups / Classes

'Users' that have the same permissions can be more easily set up / managed using 'User Groups'. This will greatly simplify the work involved when adding a new user. To get started, 'User Groups' need to be defined through the 'Settings > Users screen'



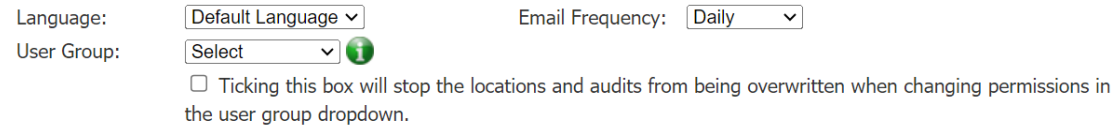
Here the default permissions, locations, and audits for that user group are defined. At the time of adding a 'New User', the administrator can select a user group which will populate the respective settings of the 'New User' automatically.



There is now also a section on 'User Groups' which allows the administrator to restrict this group to certain audits. This makes restricting users to certain audits easier as they no longer need to be selected individually.

3.3.3 Adding a User

When adding a new user, selecting an entry in the 'User Group' dropdown will apply the permissions and locations previously defined for that user group. When editing an existing user, selecting an entry in the 'User Group' dropdown will not alter the permissions or the locations unless the checkbox is selected first.



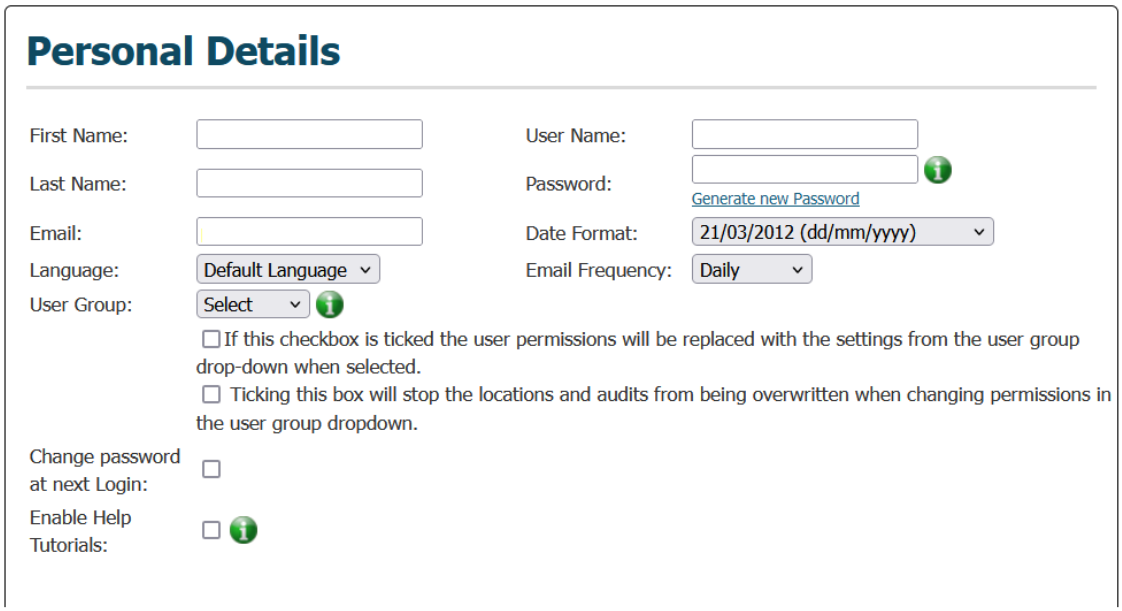
To apply a 'User Group' template for existing users, the administrator would tick the checkbox below the User Group selection and then choose an entry in the User Group dropdown. The administrator then needs check the permissions are set correctly before saving the users new settings.

3.3.4 Personal Details

'Personal Details' allows the system administrator to change a user's login attributes, and also contains the personal details of that user.

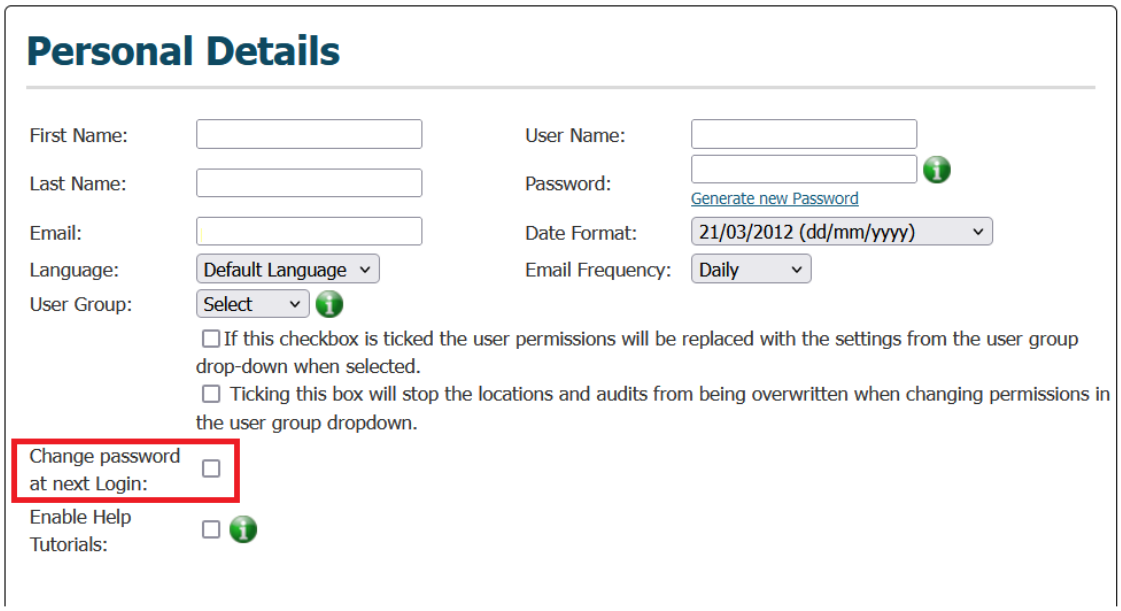
These details are:

- First Name
- Last Name
- Email where emails should be directed to
- Email Frequency
- Language the site is presented in
- Username
- Password
- Date Format the system presents to the user



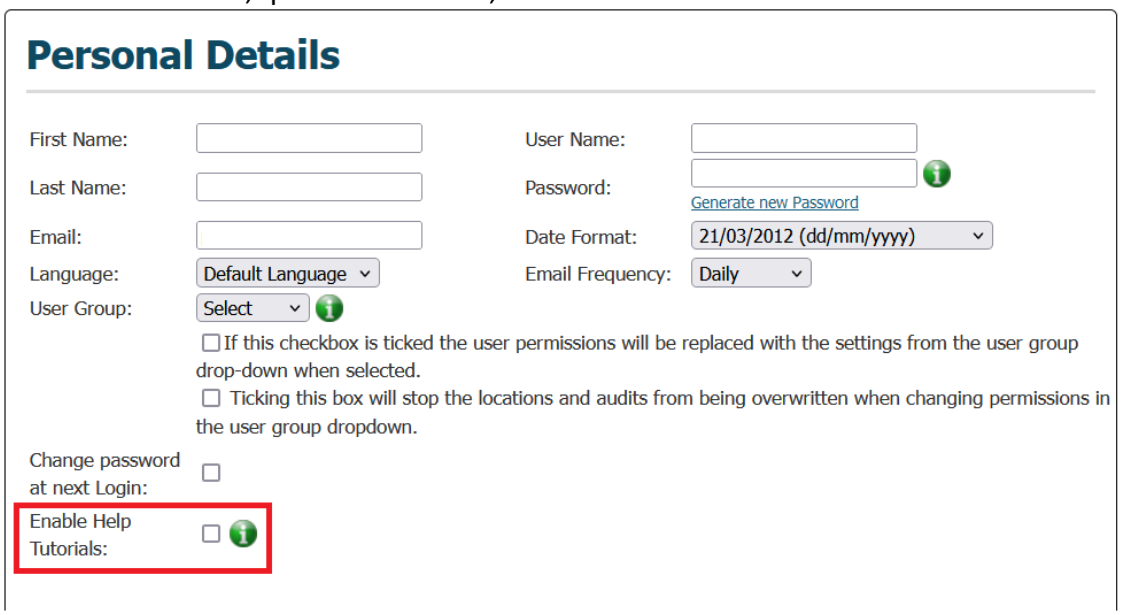
3.3.5 Password Management

A one-time setting is available to actively force a user to change their password. By an administrator enabling the "Change Password at Next Login" setting, the user will be actively redirected to a password change screen on each login until said user has submitted a new password conforming to any password strength settings previously set.



3.3.6 Help Tutorials

Help tutorials are available for those who need some extra guidance. For the users who have this permission enabled, extra content will be available for said users inside the audit and edit audit areas. At the moment the help tutorials cover audit creation, audit maintenance, question creation, and answer creation.



3.3.7 Permissions and Access

Every user has permissions enabled / disabled that affect that a user's visibility and ability to access and manipulate various parts of the system.

The **Editing** area allows the user to change master details such as the standard email text sent out by our system.
If all the checkboxes are ticked, that user can:

- Edit the Details and Permissions of other Users
- Change the Location structure for their company
- Edit Audit Types for their company
- Change the text in the email sent out upon completion of an audit
- View Mobile Devices linked to their company
- Change their own Username and Password.

The **Auditing** area identifies what permissions that user can have in audit management. If all the checkboxes are ticked, that user can:

- Fill-in Audits
- Archive Completed Audits
- Edit Questions and Settings in the Audit Templates
- Access the Compliancy screen and Resolve Compliances
- Authorise Compliances
- See Audits other users have completed as opposed to just Audits they have completed
- Alter Action Details in Compliancy screens.
- Manage private audits and those who can access the hidden completed audits
- Alter the data structure and its order for the completed audit excel downloads

The **Management** area will enable the user to see certain management screens. If all the checkboxes are ticked, that user can:

- View the League Tables
- Bar Charts and Overdue Actions management reports
- See a breakdown of answers chosen in an audit
- View the Email Log.
- View and analyse comment trends based on comment types

The **Emails Reminders** area identifies exactly what a user receives in emails from AuditForm. If all the checkboxes are ticked, that user can:

- Receive email alerts of upcoming audits
- Receive the Overdue Actions report. There is a setting for 'Overdue Email', and a setting for 'Outstanding Email'. The Outstanding setting overrides the overdue setting.
- Receive the Audits Awaiting Authorisation report only if they are able to authorise audits.

- The Hide Email from Signoff is useful at the end of filling in an audit where this user would naturally be added as an email option.
- The Hide Email from Action Email Signoff is for when resolving non-compliances and when raising an action email, this user would naturally be added as an email option.
- Escalation emails are for when an action is escalated to managers. This user can be included in receiving an escalated action.
- Unpublished emails are for the unpublished email report recipients.

The **Diary** area specifies what access to the diary that user can have. If all the checkboxes are ticked, that user can:

- View the Diary screen
- Add new planned audits to the diary
- Edit the dates of planned audits
- See all the auditors in the diary.

The **Miscellaneous** area covers items that don't fall into the above categories.
The permission 'Default to All auditors in completed audits' makes sure that the Completed Audits screen audit default is set to All rather than the logged in auditor.

The permission 'Manage Data Retention' allows that user to specify when audits will be archived in the 'Audit Settings' screen. When this is selected, the user will be able to choose globally, or by audit, how long the data is to be kept for. An overnight job will permanently remove all completed audit details for this audit that are outside the specified retention period.

The **Locations** area gives the user access to the locations specified. Only locations specified in the permissions Locations area will be made visible to that user.

The **Restrict to Audits** area will restrict the user to only the audits selected below. If this section is left bank, no user/audit restrictions will apply.

Permissions

Editing

Users: ☑ Locations: ☑ Audit Types: ☐
Themes & Email Text: ☑ Device Management: ☑ Edit own Details: ☐
Comment Types: ☑ Edit Hook ☑ User Responsibilities: ☑

Auditing

Fill-In: ☑ Archive: ☐ Editing: ☑
Other Users: ☑ Change Action: ☑ Archive Unpublished: ☑
Action Email: ☑
Private Access: ☐ Use multiple non-compliance: ☑ Private Access Audit: ☐
Dynamic Excel Download Configuration: ☐

Compliancy and Authorisation

Compliance: ☑ Authorise: ☑

Management

League Tables: ☑ Audit Scores Histogram: ☑ Actions Report: ☑
Question Analysis: ☑ Email Log: ☑ System Log: ☑
Trends: ☑ Actions Overview: ☑ Issues Report: ☑
Comment Type Analysis: ☑

Email Reminders

Awaiting Authorisation: ☑ Overdue Email: ☑ Outstanding Email: ☐ Upcoming Audits Email: ☑
Hide Email from Signoff: ☑ Hide Email from Action Email Signoff: ☑ Escalation Email: ☑ Unpublished Email.: ☐

Diary

Access Diary: ☑ Plan Audits: ☑ Edit Planned Audits: ☑
See All Auditors: ☑

Miscellaneous

Default to All auditors in completed audits: ☐ Manage Data Retention: ☐

User Responsibilities

Escalation Dave: ☐

Locations

Select All ☐

Country	County	Postcode	Department
America ☐			
Canada ☐			
Japan ☐			
United Kingdon ☑			
	Liverpool ☐		
		L45 J8G ☐	
			Legal ☐
			Traffic Management ☐
	Manchester ☐		
		M24 L4A ☐	
			Crisp Management ☐
			Development ☐
			Infrastructure ☐

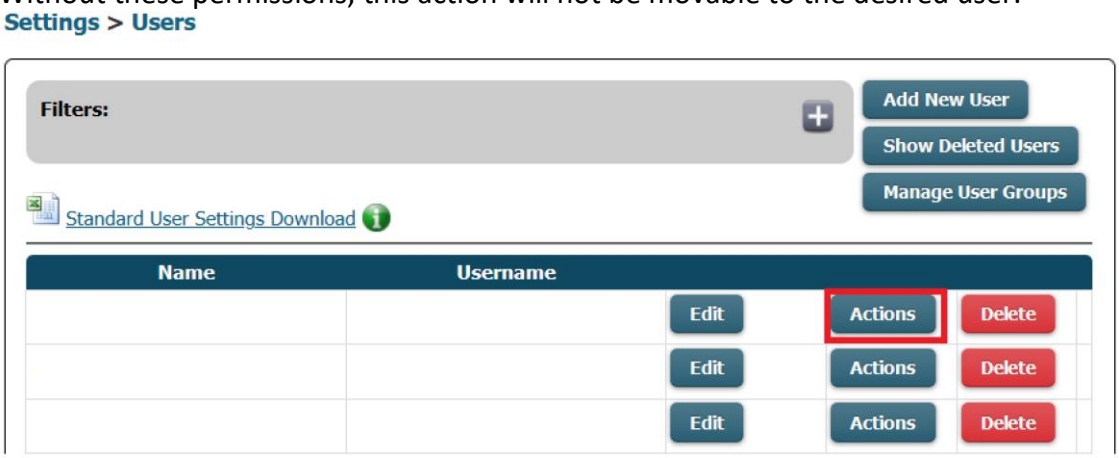
Restrict to audits

3.3.8 Reallocating Actions Assigned to Specific Users

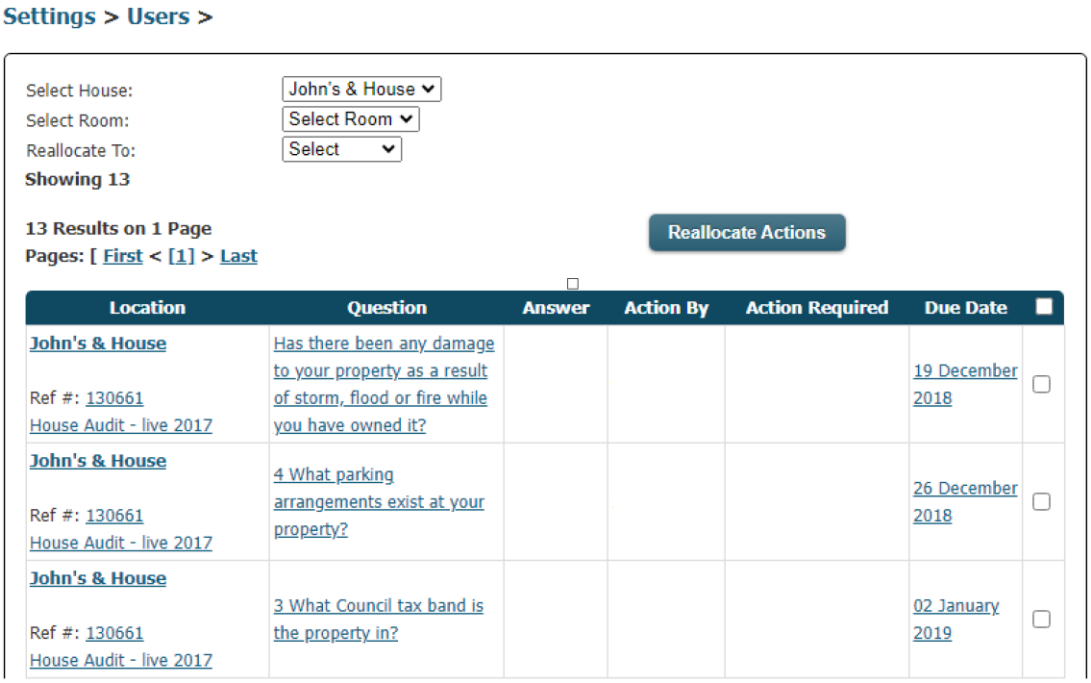
When a user changes role or leaves, existing outstanding actions may be placed under said user's name. These actions may be numerous and will likely need to be reassigned to the person taking over the now vacant role. It is now possible to move these actions in bulk rather than manually assigning each action to a new user.

On the user settings page, a button called "Actions" is available. Once clicked, it will take you to the actions reallocate page. To be able to move actions from one user to another, it is important to note that said recipient of existing actions needs access to "Compliance", as well as access to the audit and the location the audit took place.

Without these permissions, this action will not be movable to the desired user.



On the page, it is possible to select the various location and or sub locations, the user to reallocate to, and which actions are going to be reallocated. Once all selections have been made, click the "Reallocate Actions" button to confirm the changes.



3.4 Locations Settings

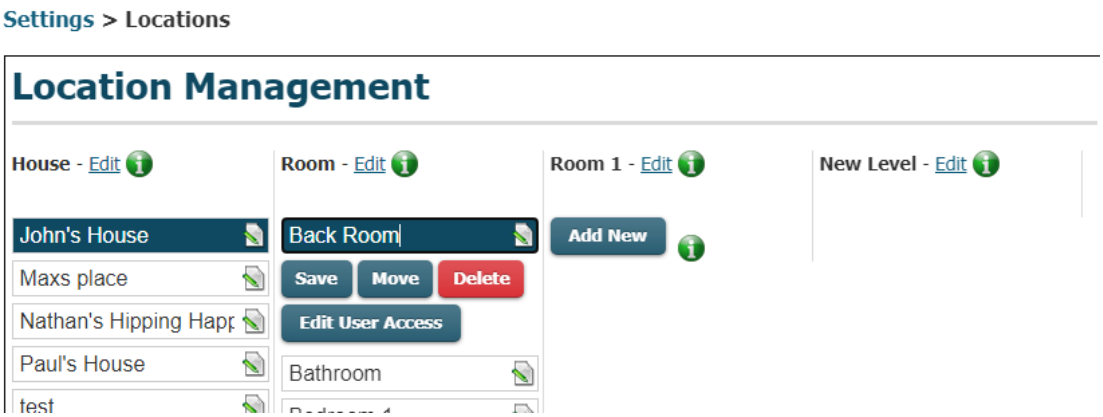
Here the administrator can represent the organisation structure for which its audits will be completed. This structure is a flexible one designed so that it can be made to match the customers organisation chart.

The organisation names and structure can be named as required. Clicking on the 'Add Location Level' tab can extend location levels.

Once the location levels have been identified, the administrator should add the locations for the top level first, and then expand each level to create the full structure.

For example, an audit company that audits multiple customer sites, the top most level would be the customer's name followed by the second level, customer locations.

Clicking on the icon that looks like a Paper and pencil, the next level of the structure is shown.



A Location can be moved by clicking on the 'Move' button and then selecting where you would like to move this Location to. Clicking 'here' will move it to the top Level.

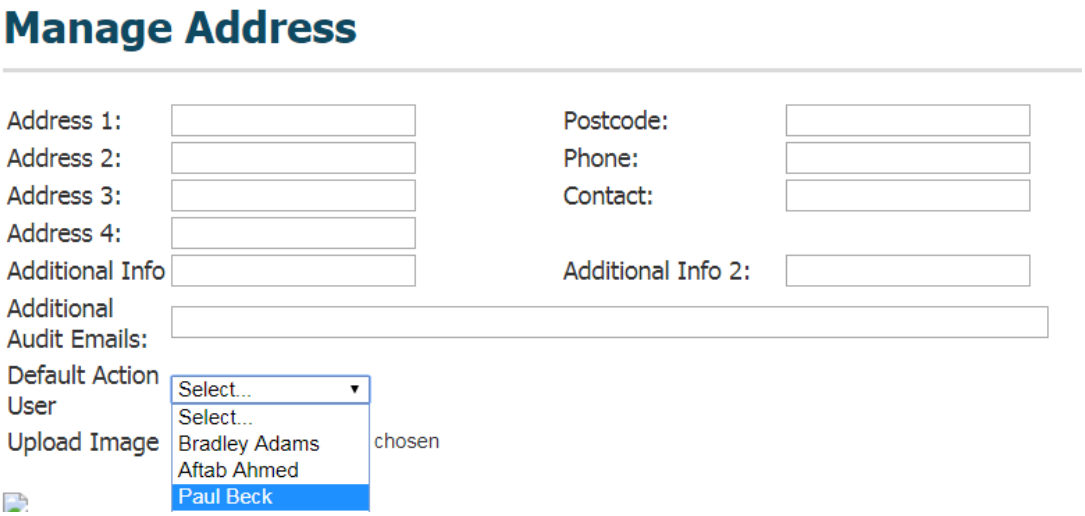
'Edit User Access' allows the user to set up at this stage which users can have access to this location. It works for all of the users that have access to the parent level (ignoring those users who have access to all locations), and allows the administrator to grant access for the selected users to this location.

If the location is deleted, then it can be re-instated later. There is a Themes setting called 'See Deleted Locations' that will enable archived locations to be shown and re-instated.

Below this is a location map where you can drill down to see which users have access to a particular location.

By clicking on a location, you can add further information about that location and see which users have access to the location.

Within the location drill down, the default action user can be selected.



This will identify who is the default action contact when a non-compliance has been identified.

You may also be able to attach an email to a location which will automatically send completed audits towards when an audit has been completed in regards to said location.

For example, here is a location structure as seen on the demo account.

England		
	Blackburn	
	Liverpool	
	London	
	Manchester	
		Heaton Park
	Norwich	
	Wigan	

On publishing an audit for a location, additional email addresses can be sent by adding the emails on this screen for this location or a location above.

In the example above, if an email address is then added to the "Manchester" location, and an audit was completed for Manchester, then the email address against England and the Email address against Manchester will be emailed.

If you want to enter multiple email addresses you can separate them with a comma. E.g., "johnsmith@auditform.com, geoffbloggs@auditform.com" (without the quotes).

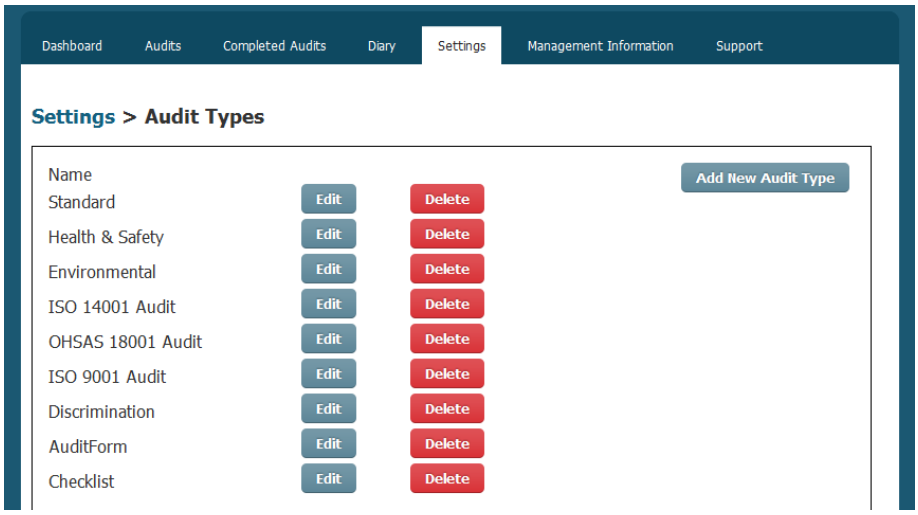
3.4.1 Manage Location PDF Details

Extra information about the location the audit was completed at can be enabled and individually selected to give a more detailed PDF front page. In order for this area to show, the theme setting 'Alternative PDF Front Page' must be enabled.

This can be found in the "PDF" tab inside 'Settings -> Themes'. This will change the default front page for a slightly different style to accommodate the extra information and optional location image. An example of the what this extra area looks like is below.

3.5 Audit Types Settings

The Audit Types screen is used to set up the audit types against which audits can be grouped. With the right permissions, users can change details with these audit types, such as the name, delete existing audit types, and add new audit types.



3.6 Email Text Settings

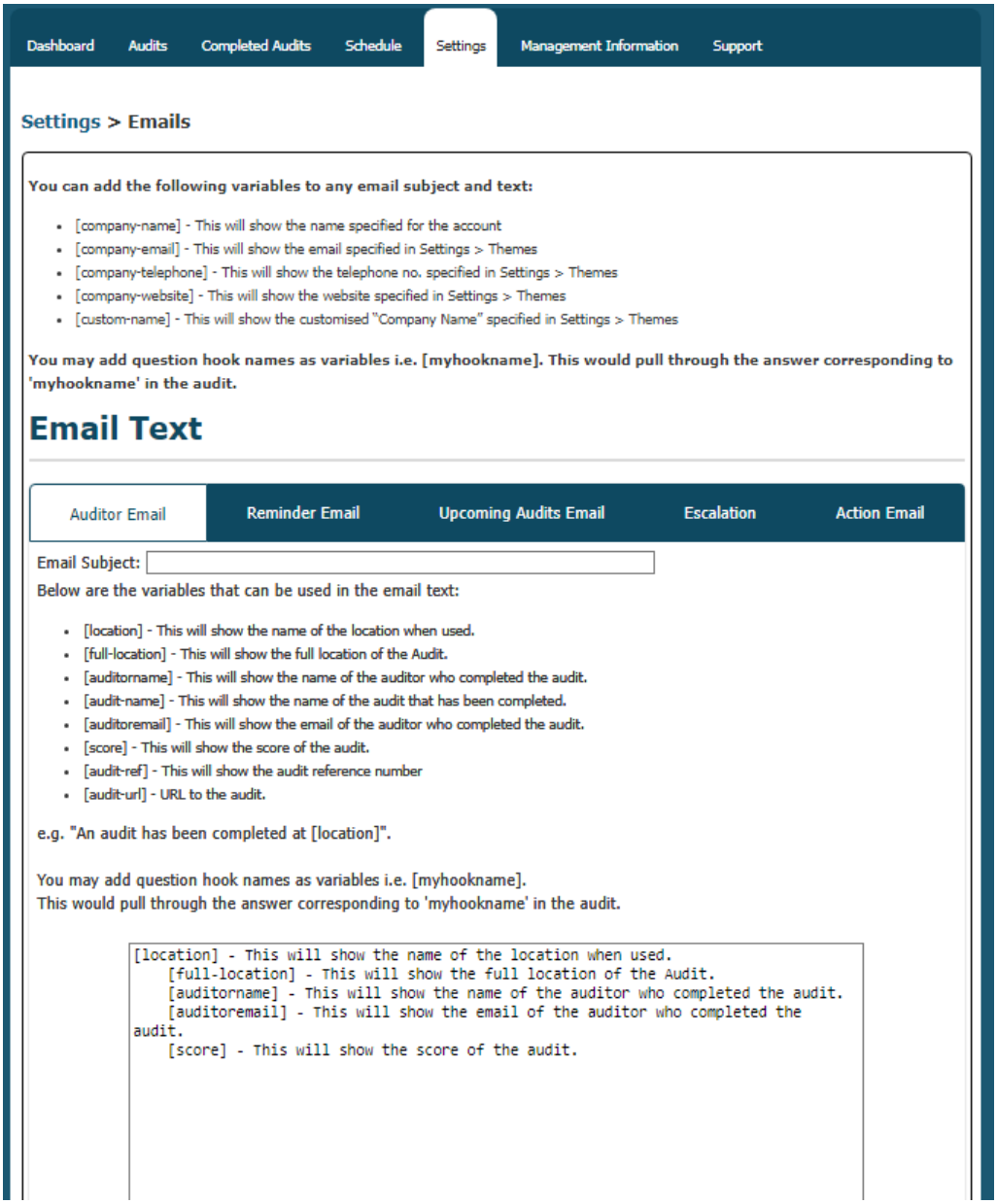
The **Email Text** screen is used to describe the various emails that are sent out to users:

- Auditor Email – Advising users who need to know via predefined settings and permissions, that an audit has been completed, including the audit and non-compliance report in the email.
- Reminder Email – Alerting users about outstanding actions under their username they need to address.
- Upcoming Audits Email – Advising auditors about an audit that they are scheduled to complete.
- Escalation Email – Sends users who have the escalation permission and the user responsibility for a specific audit an escalation report
- Action Email – Enables an email to be created as part of the email resolution process.

Variables can be placed in the text or subject such as:

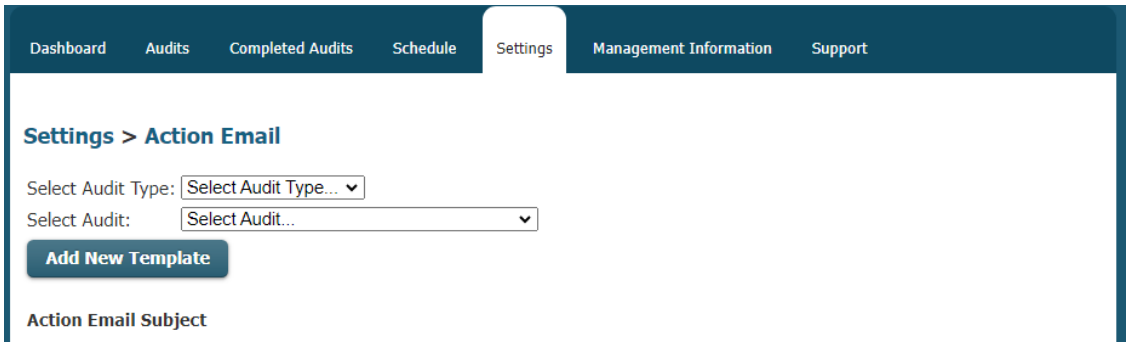
- location
- full-location
- auditorname
- audit-name
- auditoremail
- score
- audit-ref
- audit-url

These variables will get automatically replaced at the time the email is sent.


Dashboard
Audits
Completed Audits
Schedule
Settings
Management Information
Support
Settings > Emails
You can add the following variables to any email subject and text:
[company-name] - This will show the name specified for the account
[company-email] - This will show the email specified in Settings > Themes
[company-telephone] - This will show the telephone no. specified in Settings > Themes
[company-website] - This will show the website specified in Settings > Themes
[custom-name] - This will show the customised "Company Name" specified in Settings > Themes
You may add question hook names as variables i.e. [myhookname]. This would pull through the answer corresponding to 'myhookname' in the audit.
Email Text
Auditor Email
Reminder Email
Upcoming Audits Email
Escalation
Action Email
Email Subject:
Below are the variables that can be used in the email text:
[location] - This will show the name of the location when used.
[full-location] - This will show the full location of the Audit.
[auditorname] - This will show the name of the auditor who completed the audit.
[audit-name] - This will show the name of the audit that has been completed.
[auditoremail] - This will show the email of the auditor who completed the audit.
[score] - This will show the score of the audit.
[audit-ref] - This will show the audit reference number
[audit-url] - URL to the audit.
e.g. "An audit has been completed at [location]".
You may add question hook names as variables i.e. [myhookname].
This would pull through the answer corresponding to 'myhookname' in the audit.
[location] - This will show the name of the location when used.
[full-location] - This will show the full location of the Audit.
[auditorname] - This will show the name of the auditor who completed the audit.
[auditoremail] - This will show the email of the auditor who completed the audit.
[score] - This will show the score of the audit.

3.6.1 Action Emails

This will allow you to create multiple templates for action emails. To activate this, go to 'Settings > Emails' and click 'Edit Action Email'.
Note: If you already have an action email set up then you will need to remove the title and the content to activate the new template system.

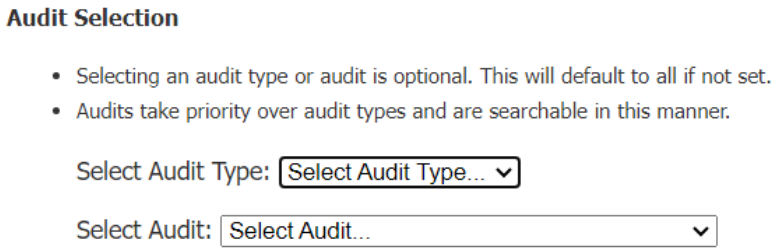


On entering the 'Action Email' template system, two dropdowns are present. These allow for easier template management in the event a large number of templates are present.
These filtering options only work for 'Action Email Templates' that have an audit or audit type specified upon creation.

Click on "Add New Template"

This will take you to the template details page where you can fill in your Subject, Header, Content and Footer to be included in the email.

Two dropdowns are also present which allow the user to assign the template to either an audit type or audit and the data displayed is affected by said users' permissions. Note that if an audit type and audit are selected, the audit takes priority and the template will now be linked to said audit.



Helpful information is available which shows what data is available to be included in the email template.

You can add the following variables to any email subject and text:

- [company-name] - This will show the name specified for the account
- [company-email] - This will show the email specified in Settings > Themes
- [company-telephone] - This will show the telephone no. specified in Settings > Themes
- [company-website] - This will show the website specified in Settings > Themes
- [custom-name] - This will show the customised "Company Name" specified in Settings > Themes

Action Email Subject:

Below are the variables that can be used with the action email.

Audit Details

- [location] - This will show the name of the location when used.
- [audit-ref-no] - This will show the audit reference number
- [audit-name] - This will show the name of the audit that has been completed.
- [audit-question] - This will show the question that the action is linked to
- [audit-answer] - This will show the answer that the action is linked to
- [audit-observation] - This will show question observation that the action is linked to
- [audit-url] - URL to the audit.
- [compliance-page-url] - URL to the compliance page for this audit.

Auditor Details

- [auditorname] - This will show the name of the auditor who completed the audit.
- [auditoremail] - This will show the email of the auditor who completed the audit

Action Details

- [action-ref-no] - This will show the action reference number
- [action-required] - This will show the required action as specified via the Resolutions screen.
- [due-date] - This will show the date by which the action should be carried out.
- [action-by] - This shows the name of the person who is responsible for carrying out the action.

You may add question hook names as variables i.e. [myhookname].
This would pull through the answer corresponding to 'myhookname' in the audit.

Action Email Header

```
Template 1 Header
```

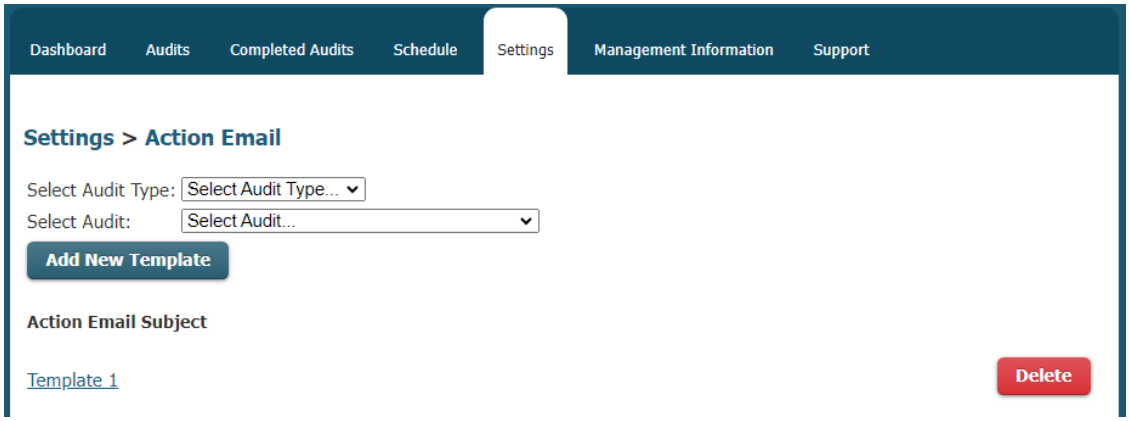
Action Email Content

```
Template 1 Content
```

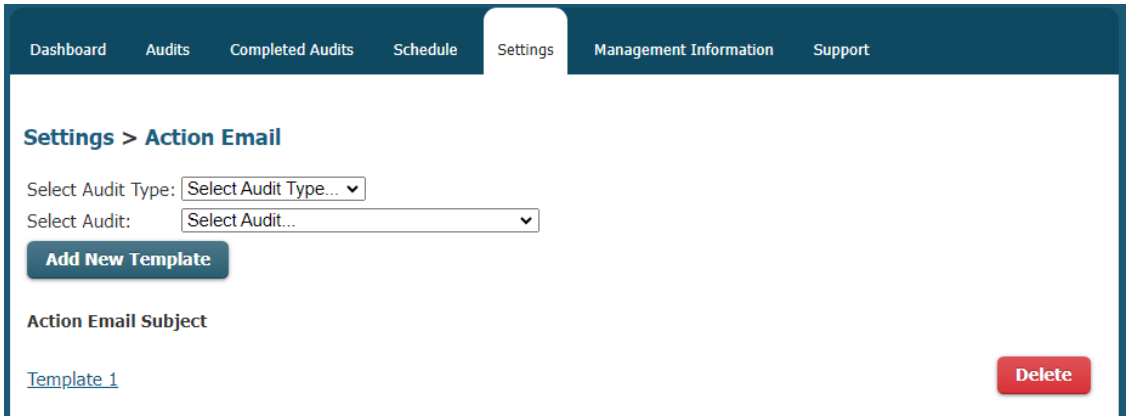
Action Email Footer

```
Template 1 Footer
```

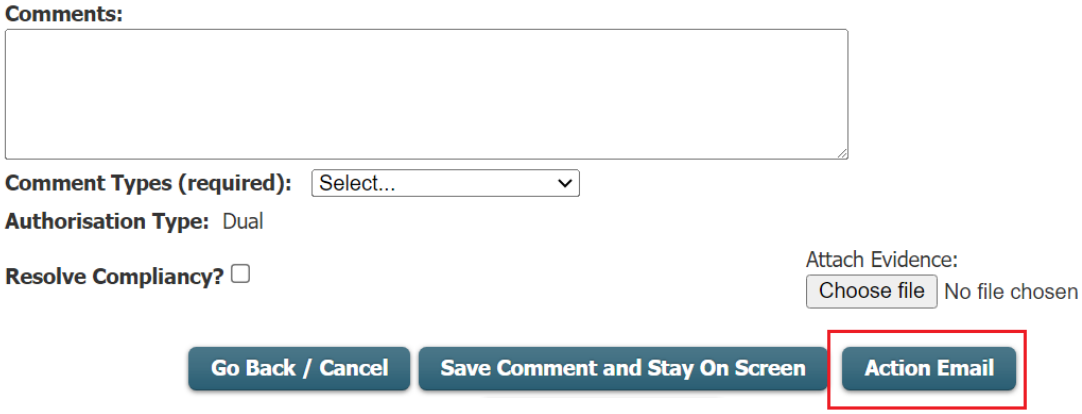
Once you have created your templates the screen will look like this to allow you to make edits to the templates.



If the template created is of a specific audit or audit type, it can be filtered for. An example of this can be seen below.

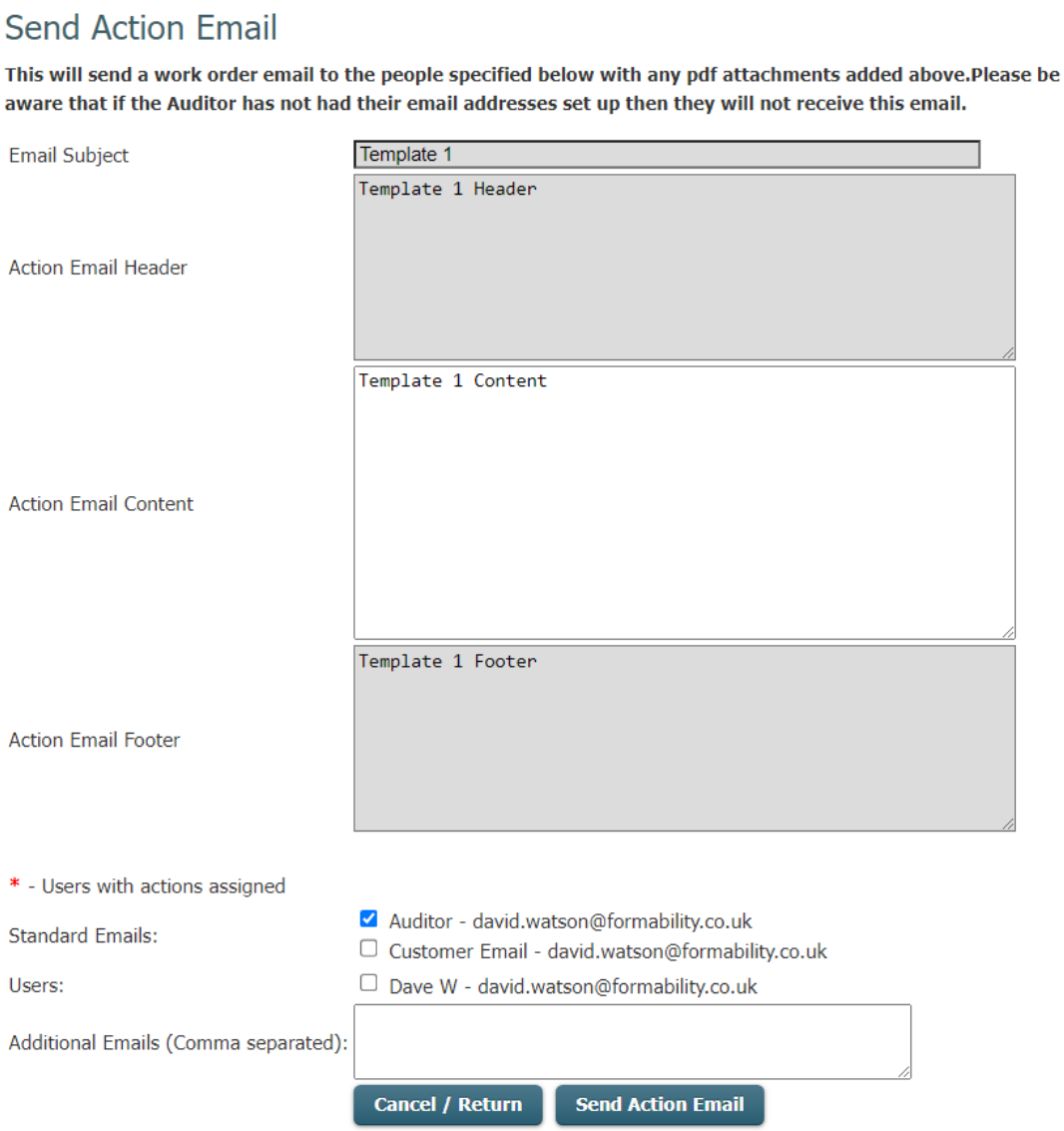


Now when resolving non compliances you can select the template to be used when sending Action emails.



This will take you to a page where you can select your template. The templates displayed below are relevant to this completed audit. Template 1 isn't assigned an audit or audit type so will appear. H&S Template is of the type H&S, which is the same audit type as the completed audit, thus it appears in this list.

Once you have selected your template you can review it before sending and make any changes necessary.
Clicking "Send Action Email" will send it to whoever has been selected.



3.6.2 Escalation Emails

Escalation emails are sent to applicable users to inform said users of outstanding actions that have yet to be resolved. This allows for a level of visibility without the user actively searching for this information.
A typical user for this is a “Line Manager”, and to be eligible to receive escalation emails for select audits, the user needs to have the user permission “Escalation Email” set and have a user responsibility for the audit being sent.

3.6.3 Corrective Action Report

The administrator can switch on the corrective action report which will be included with the audits that are emailed. This report contains a list of actions to be resolved.

3.6.4 Reminder Emails

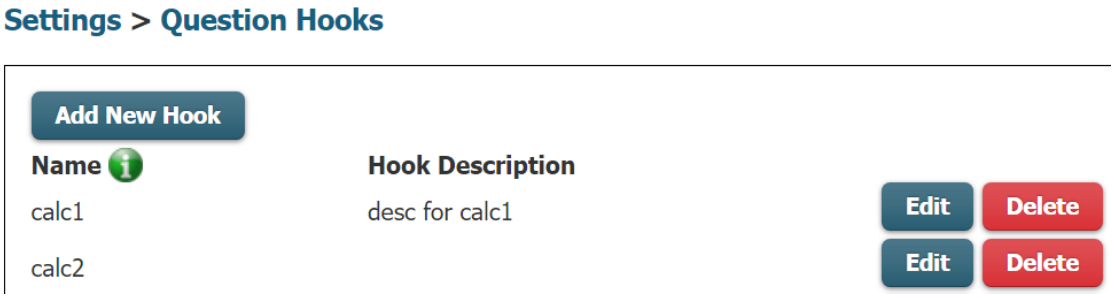
The administrator can switch on reminder emails that are sent to users. Each user can have specified which reminder email they receive in the user settings.

3.6.5 Upcoming Audits Email

For planned upcoming audits emails, the administrator can specify whether an email should be sent when an audit is planned, and the number of days before the audit a reminder should be sent. Whether a user receives these emails also depends upon the user settings. The user permission "Upcoming Audits Email" needs to be enabled for a user to receive email reminders.

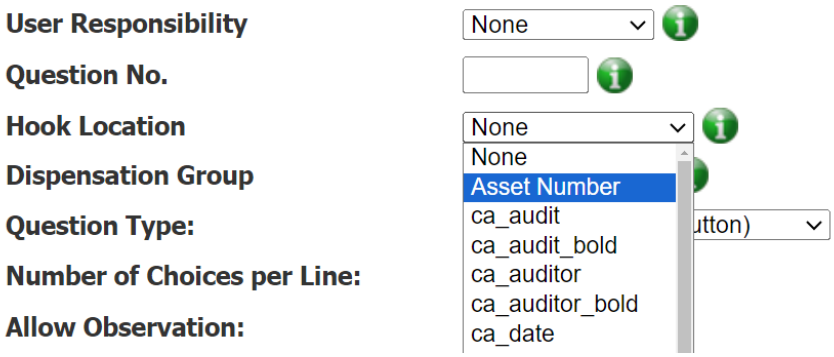
3.7 Question Hooks Settings

The ability to apply hooks to audit questions has been given so that information linked to the hook can be displayed in other areas of the system. This screen allows the user to add and maintain user defined question hooks.



Permission to access the 'Question Hooks' and the 'Answer Hooks' settings screens is granted by setting the user permission 'Edit Hook'.

So, if a custom hook called 'Asset Number' is created, this can then be put against a question while editing an 'Audit'. Below is an example of what this might look like.

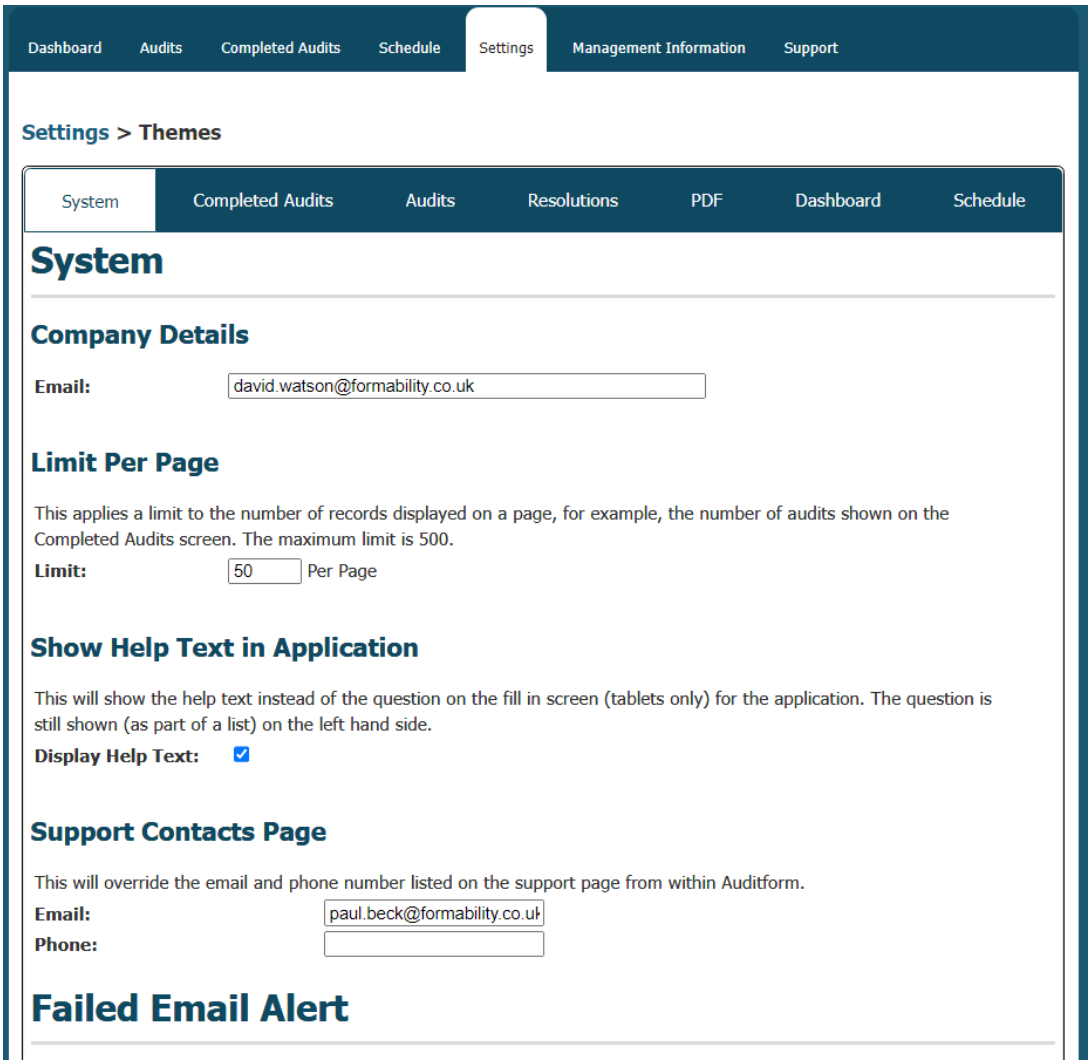


3.8 Answer Hooks Settings

'Answer Hooks' work in the same way as 'Question Hooks' except that the custom hooks are applied to answer options as opposed to the question.

3.9 Themes Settings

The Themes settings screen is used to enter terminology and properties specific to your organisation. Themes settings are organised into categories to aid navigation.



3.9.1 System

- **Company Details -** Email. These can be used as parameters in email scripts.
- **Limit Per Page -** the limit of records you want displayed on a page (with a maximum of 500).
- **Show Help Text in Application -** an option to decide whether or not the help text instead of the question will be shown on a tablet.
- **Support Contacts Page -** A setting to allow a customer to specify their own contact details for support requests.
- **Recipient of Failed Email -** If selected, the email under 'Support Contacts Page' will receive invalid email notifications.
- **Strong Password -** A setting that can force the use of a 'Strong Password'. If set, the password settings below it will apply to all users. The administrator can set the requirements for setting a password by editing the values and ticking the checkboxes where needed.
- **Exclude Non-Action Users from Overnight Report -** When set, only users with actions assigned to them can see those action in the email.

- **Data Retention Period (Months) -**This allows the administrator to specify how long data for completed audits is held. By setting this option, after the desired time period has been exceeded, any completed audits that meet the conditions for deletion are automatically deleted.
- **App Specific Save to Device -** Saves photos taken in the app to the devices photo library when enabled.

3.9.2 Completed Audits

- **Percentage Bands -** allows a user to set at what percentage the colour should change to for the status indicator for a completed audit. If the default percentage bands are insufficient, custom percentage bands can be created by clicking on 'Add Percentage'. The alternative settings will replace the default settings when 'Save Changes' has been pressed.
- **Audit Data Type Shown -** the ability to affect the audit date shown. There are 3 dates used to monitor the audit.
    - The creation date -This is the date the audit was created.
    - The published date - This is the date the audit is published.
    - The completion date -This starts as the creation date, and on publishing and the second indicator is set (see below), becomes the published date.

  There is also an indicator to allow the audit completion date to be replaced by the published date or not, and an indicator that allows the completion date to be changed.
- **Archived Location Display -** On selection, locations that have archived will be available for viewing in the system.
- **Archived Audit Templates -** When enabled, allows users to view details of audits completed that have their audit type archived.
- **Completed Audits: Audit Type Selection -** This allows audit selections in the Completed Audit screen to commence with Audit Types selection, followed by Audit selection, rather than just an Audit selection.

3.9.3 Audits

- **Next Audit Reference Number -** a custom audit reference number setting. This number gets increased by one every time there's a new audit.
- **Fill-In Location Selection** – The check box selection will make sure that auditors who only have lower location level entries will only see location selections that they need to make.
- **Action Users Selection -** A setting to select all the users that have actions against them on the signoff screen at the sign-off stage of filling in an audit.
- **Default Auditor Not Selected -** Some auditors will always need to deselect themselves when using the website to complete an audit if said auditor does not want to be copied in on the audit email. This setting will save the auditor some time as it does not select the auditor by default.

- **Hide Auditors on Signoff -** Some accounts have a large number of auditors who would not ever want to receive a copy of the audit, so this allows the list to be reduced in these circumstances.
- **Allow Blank Action User -** This the option to give a blank action user as the default. The setting 'Record due date entered', if not set, will not allow the due date to be entered if the blank action user selection is selected. If it is set, action dates entered against a blank user will be accepted.
- **Unanswered Question Scoring -** This allows an alternative process for the scoring of unanswered questions. If selected, then the score for any unanswered questions will be subtracted from the total possible score in the same way that N/A answers are.
- **Audits: Audit Type Selection and Search -** When turned on, the audits screen will show additional filters to allow audit selection by audit type and/or audit search.
- **Show Location Emails on the Completed Audits 'Publish Audit' screen -** When selected, shows the default emails linked to the location the audit was completed. This allows the user to un-select emails linked to the location.
- **Audit Grouping -** an audit grouping option that affects how the audit emails are produced. You can make sure each audit at a location is distinct or grouped with other audits conducted at that time at that location

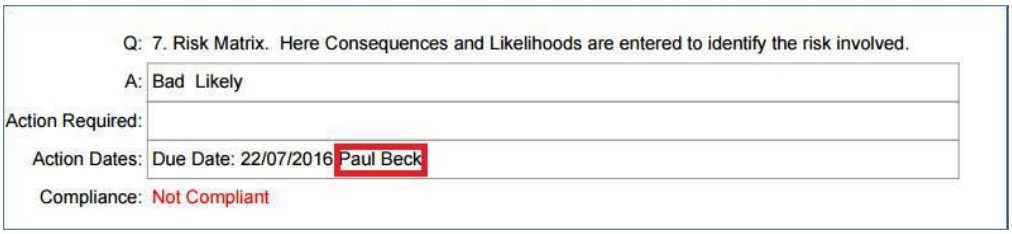
3.9.4 Resolutions

- **Single Authorisation -** A single authorisation indicator, allowing the user to decide whether or not the authorisation step to happen. If set, when the site manager approves an action, it also authorises the resolution.
- **Force Comment on Non-Compliance Resolution -** If it is desired to allocate a standard comment against each resolution as part of the approval process, this setting allows for that.
- **Resolution Authorisation Prompt -** When enabled, a confirmation box will be displayed before saving any resolution changes.

3.9.5 PDF

- **Logo -** the company logo with the ability to change it.
- **Display action user on PDF -** an option to additionally show who needs to resolve the action on the default PDF report. This setting determines whether or not to show the name of the user who needs to resolve non-compliances on the audit PDF.

When enabled, the user's first and last name will appear next to the action due-date.



- **Audit Report Footer -** An audit report footer that is used on the audit page footing.
- **Alternative PDF Front Page -** Show an alternative version of the PDF front page. The layout used is different than the default, and includes additional content like optional location details. Location details can be selected in the drill down area in 'Settings -> Locations'.

3.9.6 Dashboard

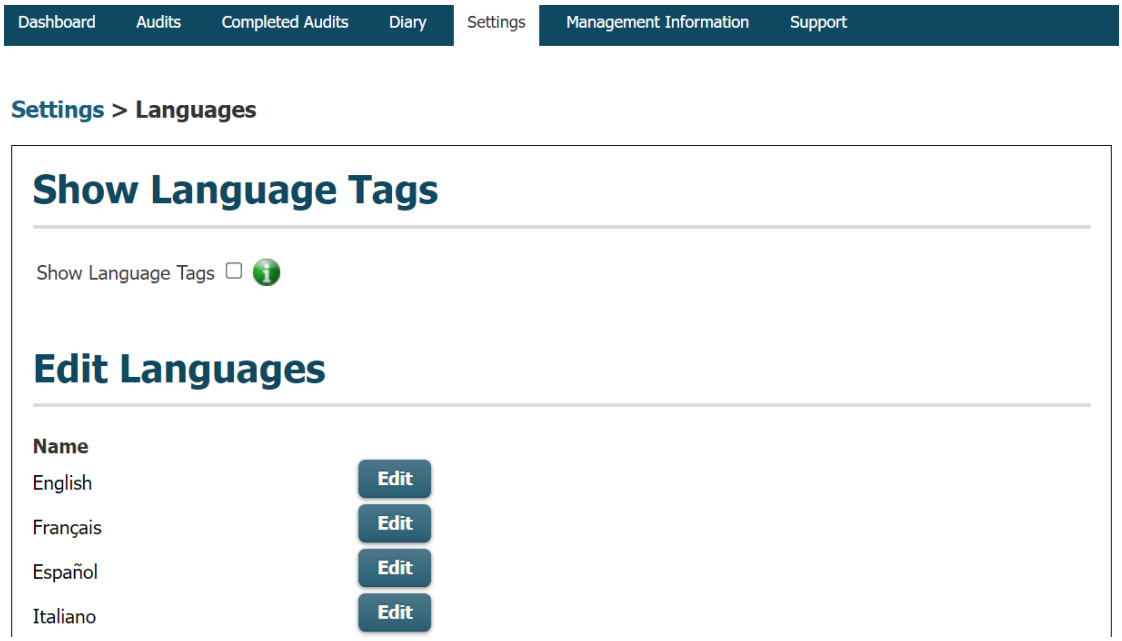
- **Welcome Message -** sets the welcome message that is shown on the dashboard for users logging into the system
- **Dashboard Display Options -** Multiple choices which affects what is shown on the dashboard.

3.9.7 Schedule

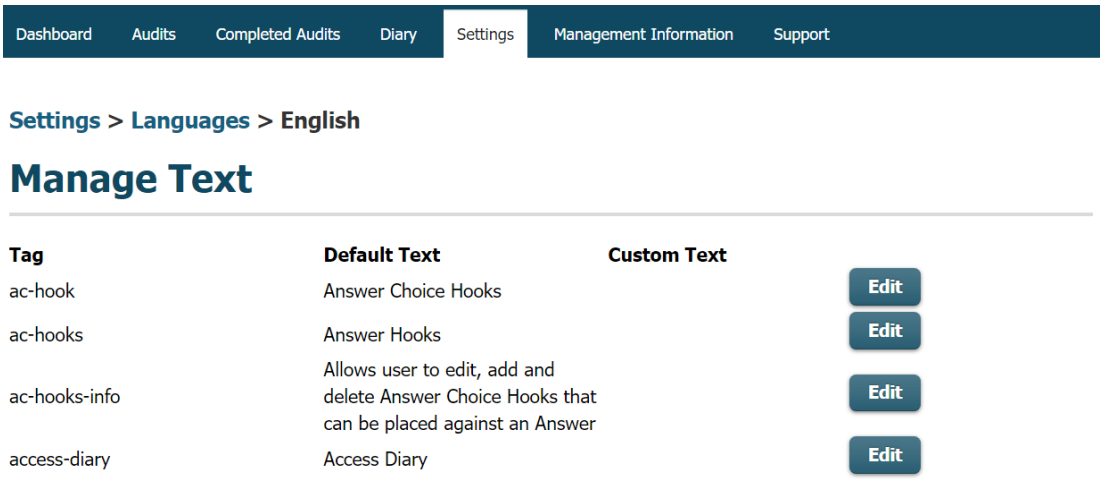
- **Overdue Audit Margins -** Allows the user to specify after how many days a planned audit which has yet to be completed is now classed as overdue.

3.10 Languages

Each company has a default language which can be overridden on a user-by-user basis.



The first thing that will be seen when entering this screen is 'Show Language Tags', this checkbox will allow you to view the site by the variables / tags that we use to display the text. Knowing the tag for the text you wish to change will help when looking for it on the 'Edit Language' screen.



The terminology that we have used can be overridden by editing the language you are using. Click 'Edit' next to the language you wish to override and you should then see a list of all the text within our system.

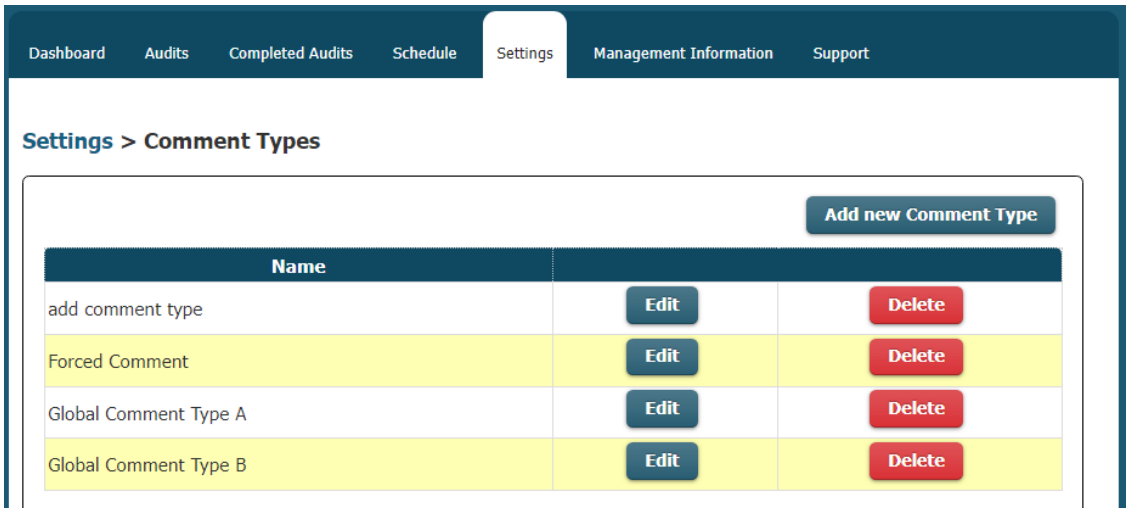
If the tag I known of the text you wish to edit, you can now search for it (using Ctrl + F). Once the tag has been found, edit the text and then click Save Changes. Your text will now be shown instead of the default text.

It is now also possible to change language settings for a particular Audit in the Audit settings screen. Once language edits have been completed, untick 'Show Language Tags' to resume normal system operation.

3.11 Comment Type Settings

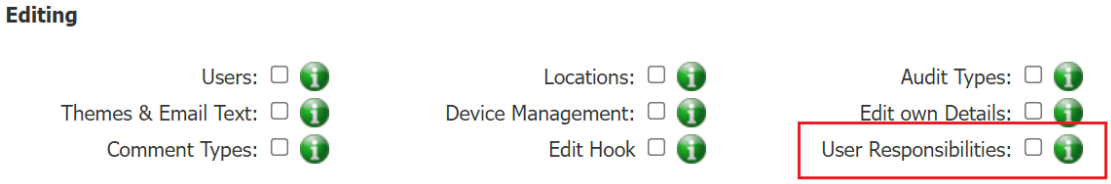
When enabled for a user in a user's permissions, 'Comment Types' can be maintained within Settings.

The 'Comment Types' settings screen is used to allow action resolution comments to be allocated against specific comment types that are identified here.

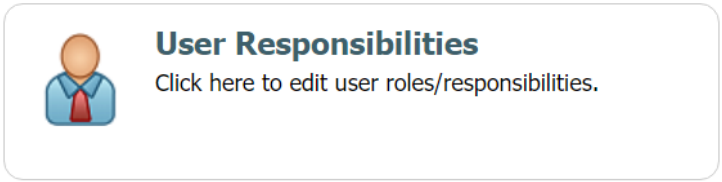


3.12 User Responsibilities

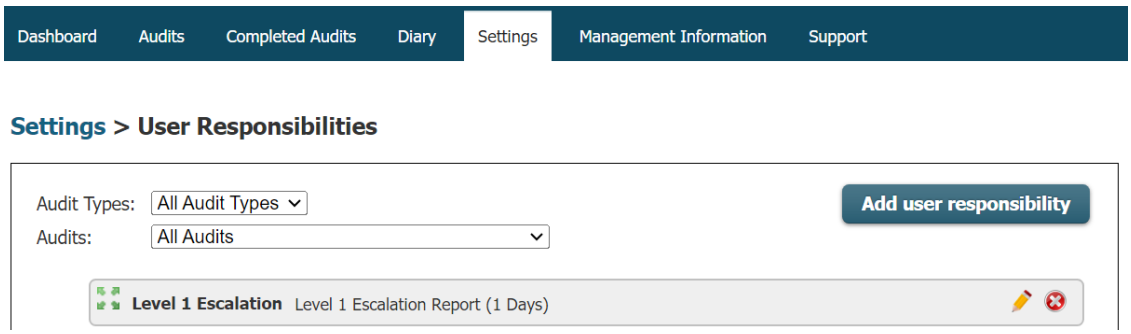
In the User Settings, there is an administrator permission called 'User Responsibilities'. Turning this on gives an administrator access to the 'User Responsibilities' screen.



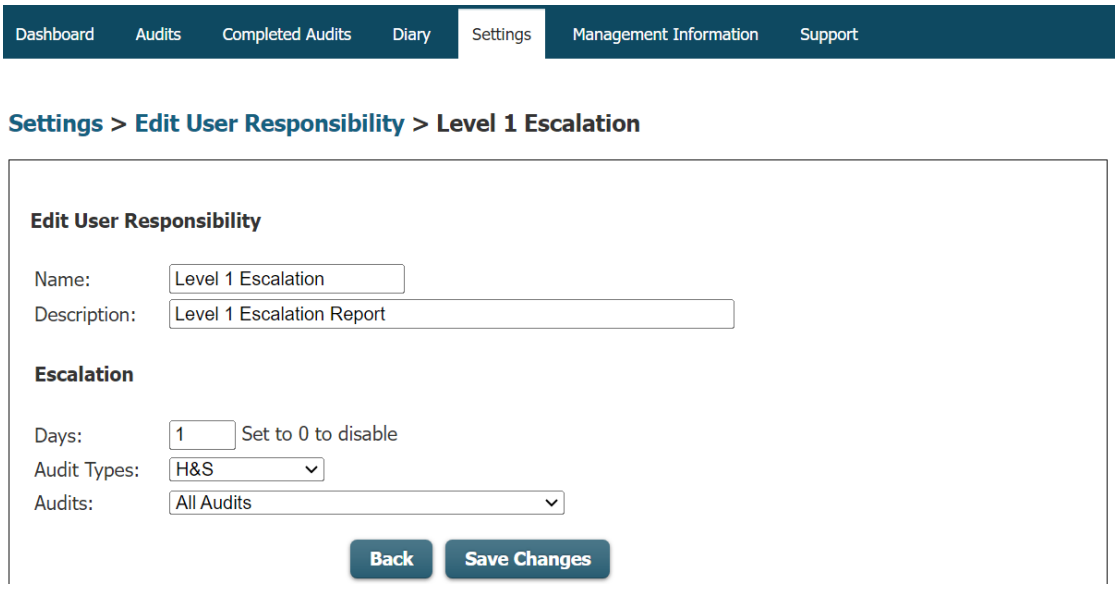
Once turned on, this is the icon seen in the settings area giving access to the 'User Responsibilities' screen.



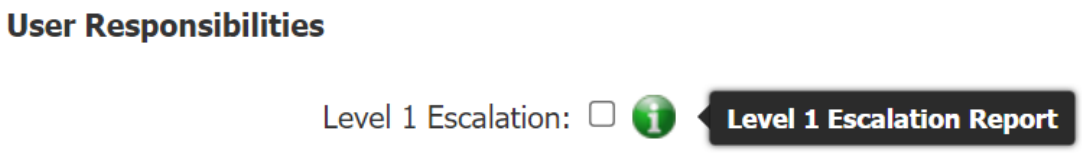
In this screen, an administrator can set up 'User Responsibilities'.



Adding or editing a responsibility takes you to a responsibility definition screen.



The number of days after the overdue action before escalation is defined. This can be by audit or overall. In the user settings screen, user responsibilities can now be selected:

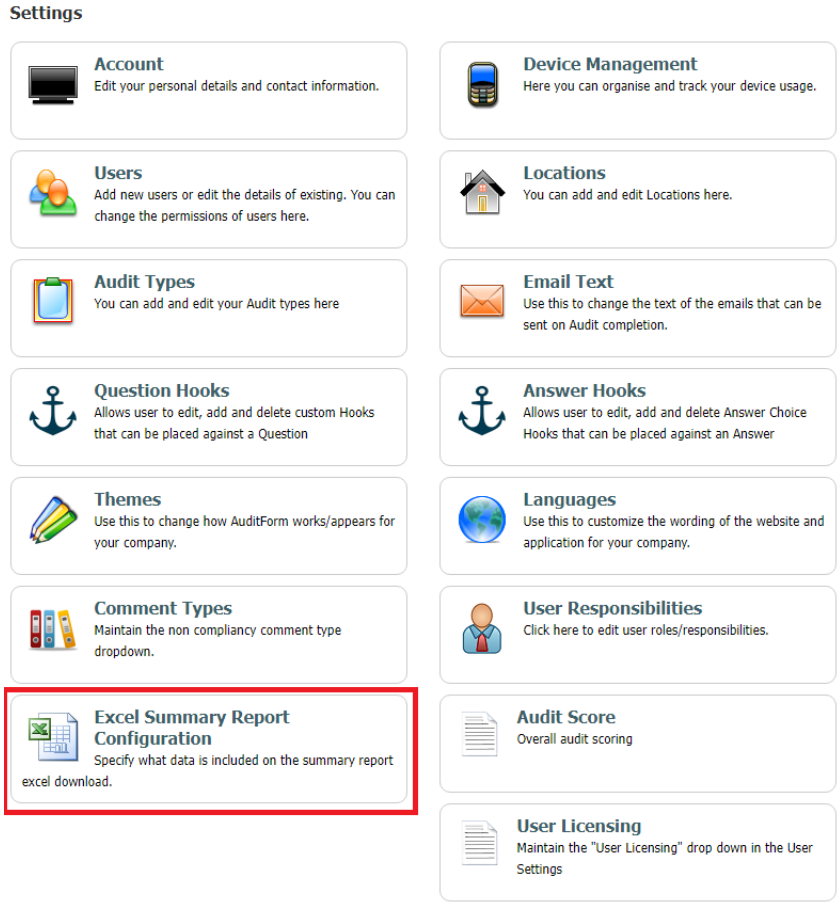


The overnight report will send an escalation email to the manager concerned defined by the user's and manager's location. Care needs to be taken when setting escalation levels to prevent the same issues being escalated to multiple managers.

3.13 Excel Summary Report Configuration

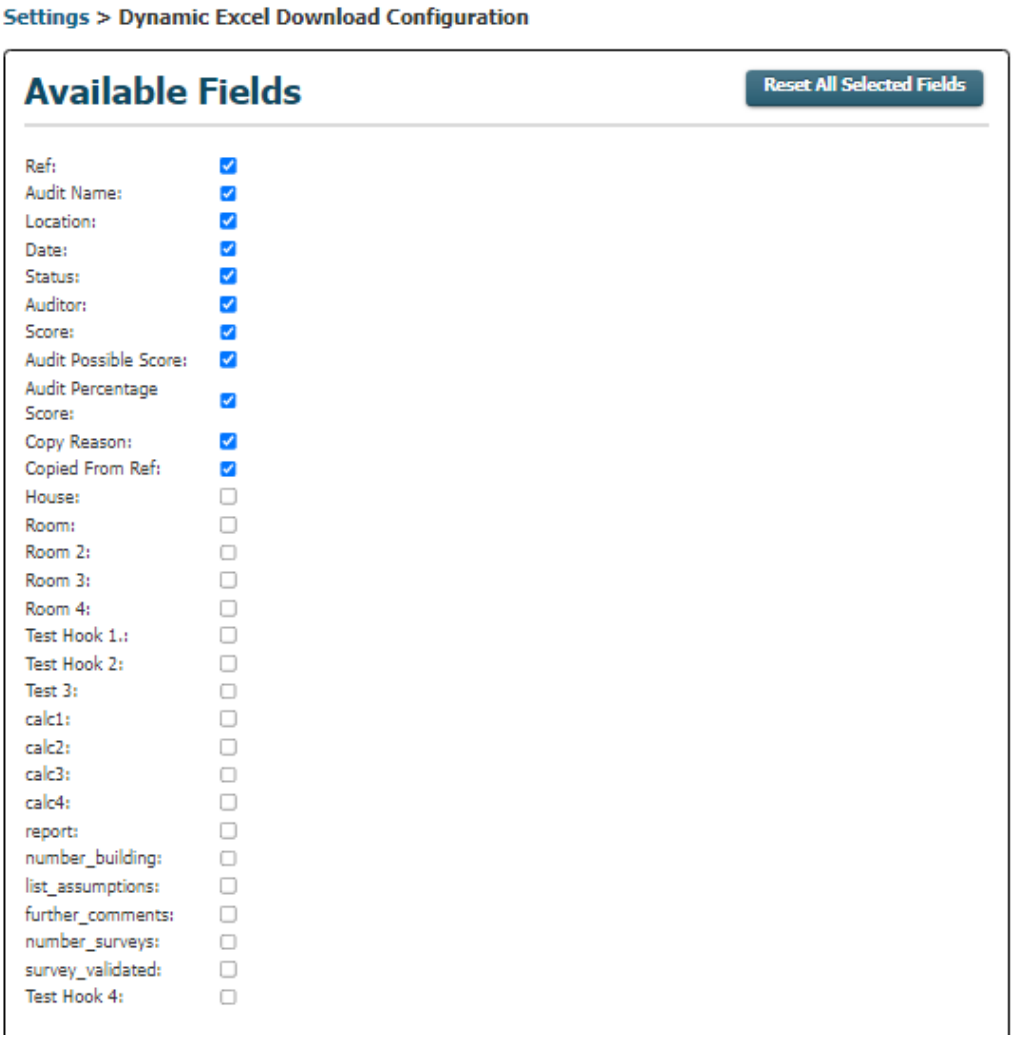
The excel summary report, much like the audit excel download, can be configured to show a desired set of data in any given order desired. In order for a user to have access to the Excel Report Configuration functionality, they must have the permission "Dynamic Excel Download Configuration" enabled.

On the settings screen, select "Excel Summary Report Configuration".

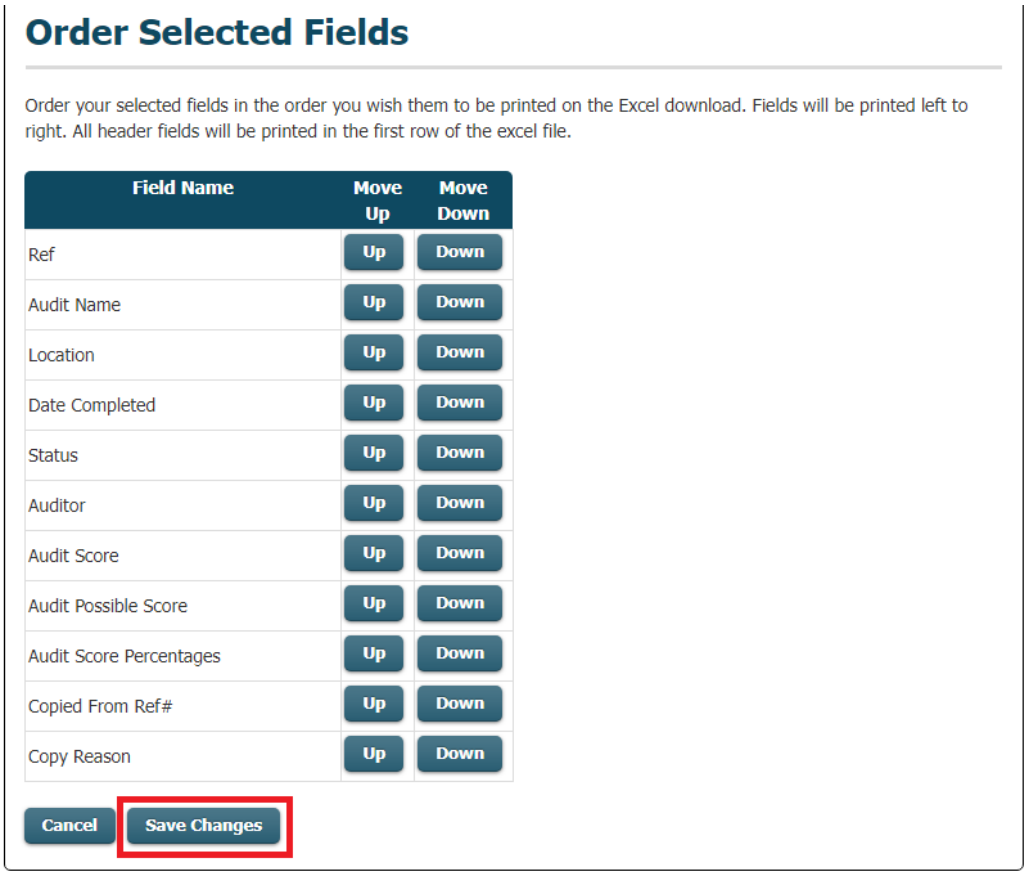


This page lists all available fields that can be includes on the Excel Summary Report. Ticking each field adds said field to the table below called "Order Selected Fields". Here fields previously saved and those added will be inserted here.

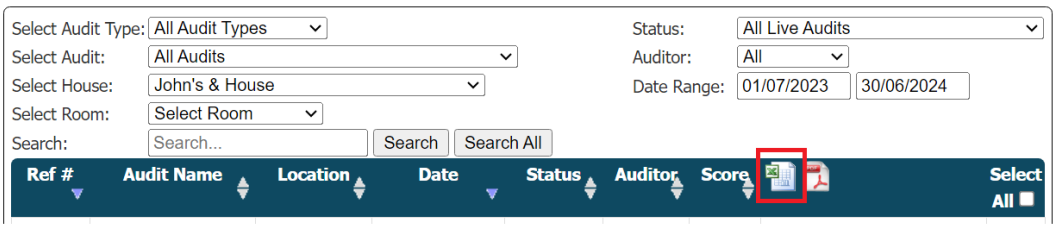
Clicking the button "Move Up" and "Move Down" will adjust in what order each field is printed. Each field should be considered a column in the header of the Excel Summary Report.



Ensure you save your changes when you are happy with the adjustments.



To download your now customised Excel Summary Report, go to the completed audits page and click the excel icon at the top of the table.



3.14 Session Memory

The system remembers your selection preferences, for example, when you select an audit in one part of the site, perhaps when looking for it in the "Completed Audit's Section", when you narrow your search by just picking the audit you want, that audit stays picked inside the site, so when you open one of the Management Tools, such as the "Bar Charts", the display will be for this Audit.

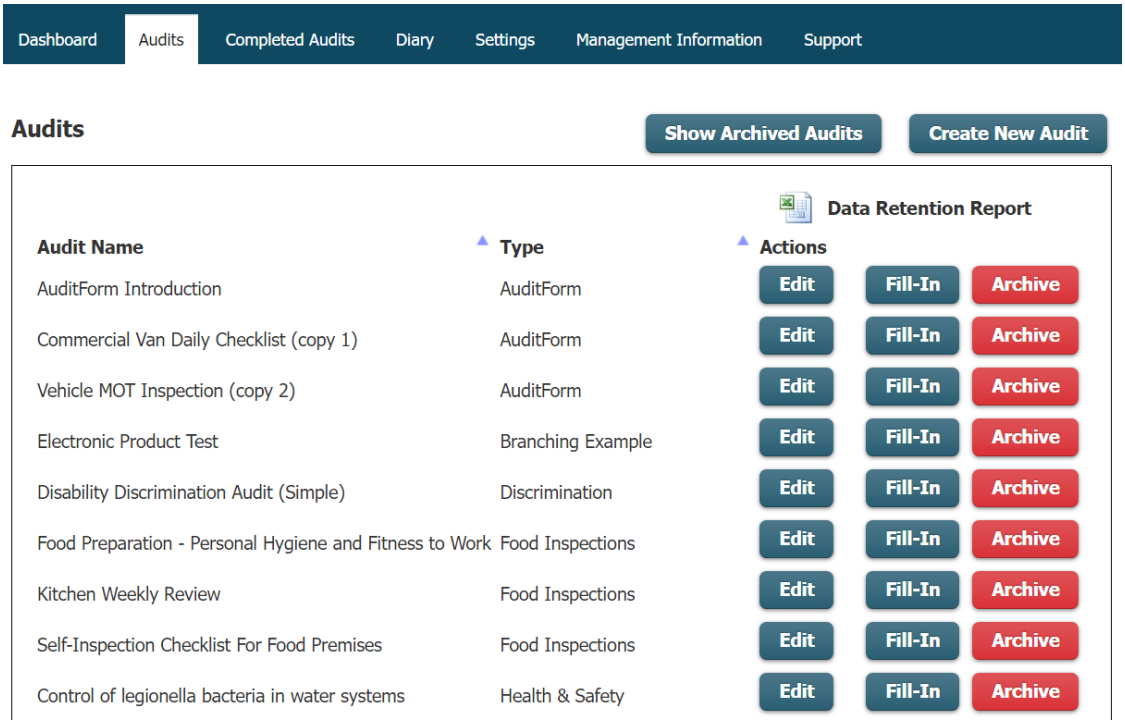
4 Audits

The 'Audits' tab takes the user to the Audit creation and online Fill-In area of the system. The audits used by your company are maintained here. Once an audit template is created, it can then be filled in on the Internet or on a mobile device application.

Audit Templates should not be changed once they have been used as changing the template have the potential of invalidating scores and questions for audits already filled in using that template.

The 'Create New Audit' button is used to create a new audit.

For audits already created, they can be maintained using the 'Edit' button or filled in online using the 'Fill-In' button, or removed from the list of audits by use of the red "Archive" button.



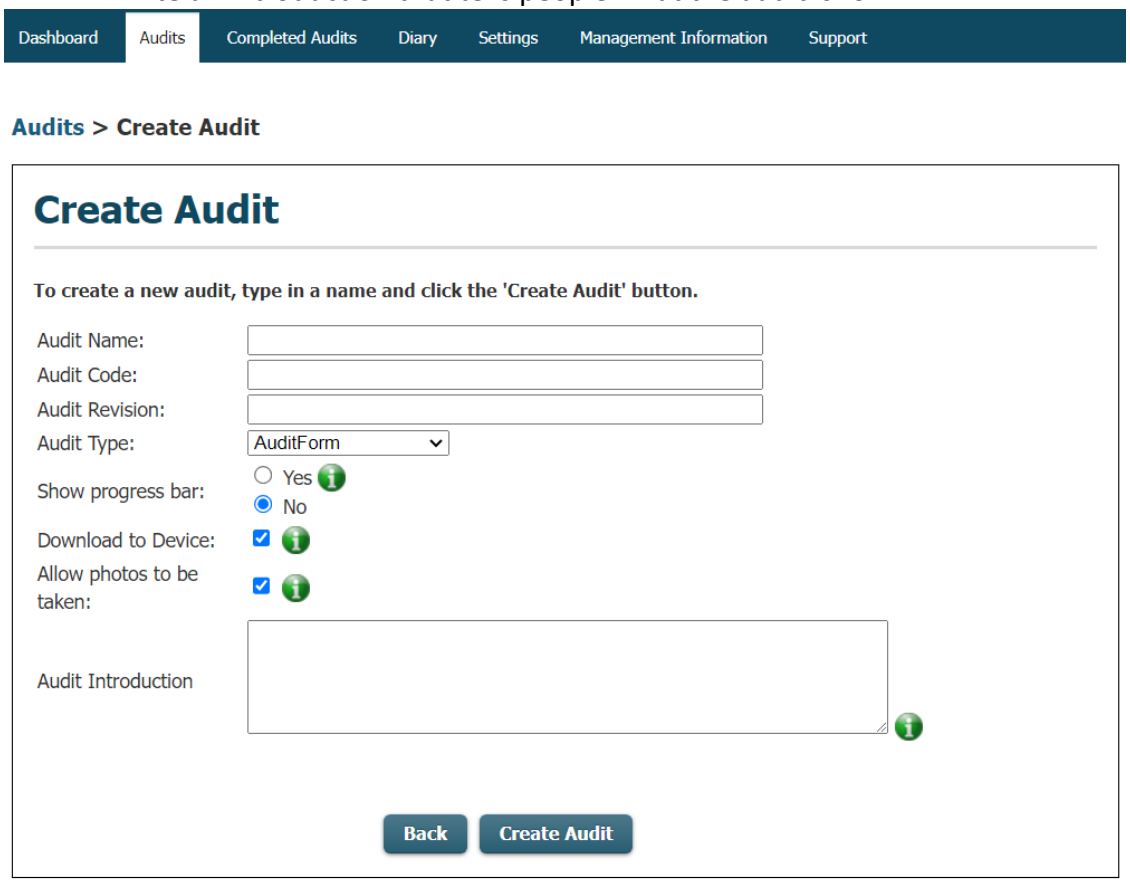
4.1 Creating new Audits

After pressing the "Create New Audits" button, the user will be taken to the Create New Audits screen. There are two sections to this screen, the 'Create Audit' section and the 'Copy Audit' section.

When creating an audit, you can choose to:

- Give the audit a name

- Select what type of audit it is
- Select whether or not the audit will have a progress bar
- Select if the audit can be downloaded to your mobile device
- Select if the audit can have photos attached
- Write an introduction that tells people what the audit is for.



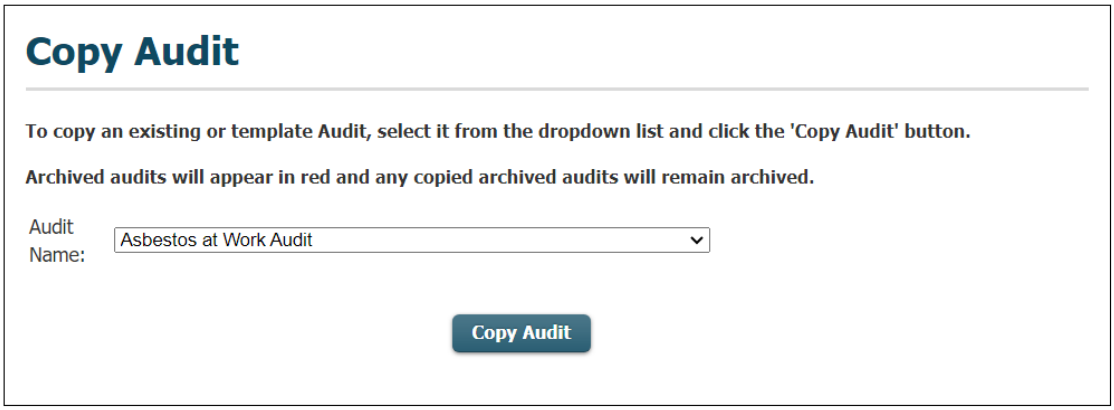
There are also the fields “Audit Code” and “Audit Revision”.
The Audit Code is a way of identifying an audit, and can be a shortened version of the audits name e.g., a Health and Safety audit code might use the code HSA.
The Audit Revision is a way to record how many changes this particular audit has gone through, and should be updated every time the audit is updated.

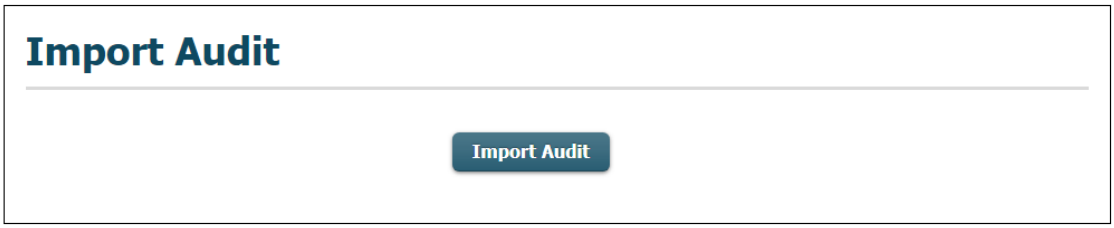
Once you’ve filled the information in and selected the ‘Create Audit’ button, the user is taken to the edit screen.

The Create Audit screen can also be used to copy existing audits. To do this, select the audit you want to copy and select the “Copy Audit” button.
This feature is especially useful when an audit needs to be updated, as editing it can cause problems with earlier completed audits. By copying it and updating the copy instead of the original, audits completed using the original version are unaffected.

Other audit settings, such as a list of locations that can access the audit will need to be checked before the audit is made available.

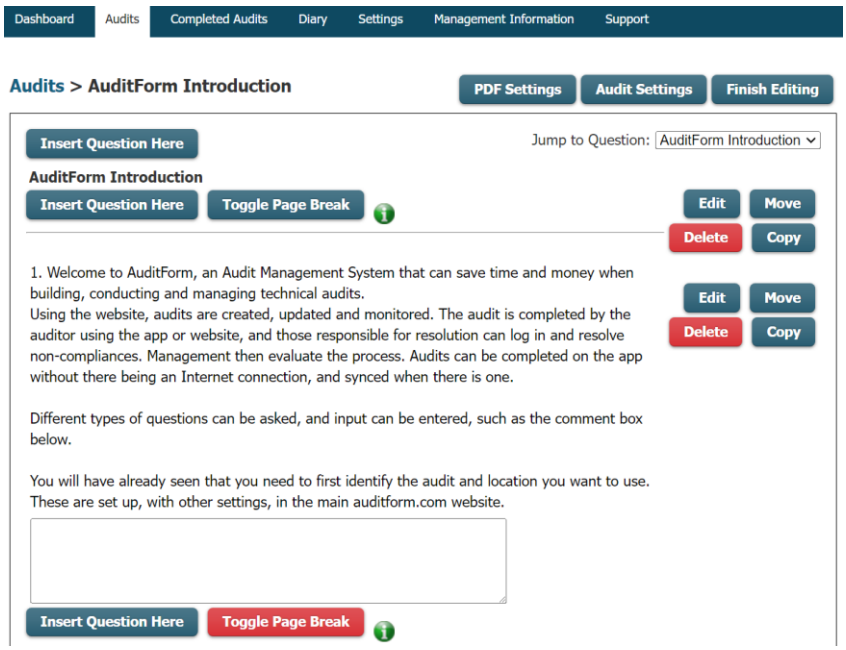
There is also an 'Export Audit' and an 'Import Audit' that allows that audit to be used by other users of AuditForm. 'Export Audit' can be found inside the audit settings once created.





4.2 Editing an Audit

After selecting the Audits 'Edit' button or after creating a new audit, the user can then maintain the 'Audit Settings', the 'PDF Settings' and the questions within that audit.



4.2.1 Audit Settings

This screen is displayed when the 'Audit Settings' button is selected.

The Audit details, settings and locations that can be used for that audit are maintained here.

The user can enter / select:

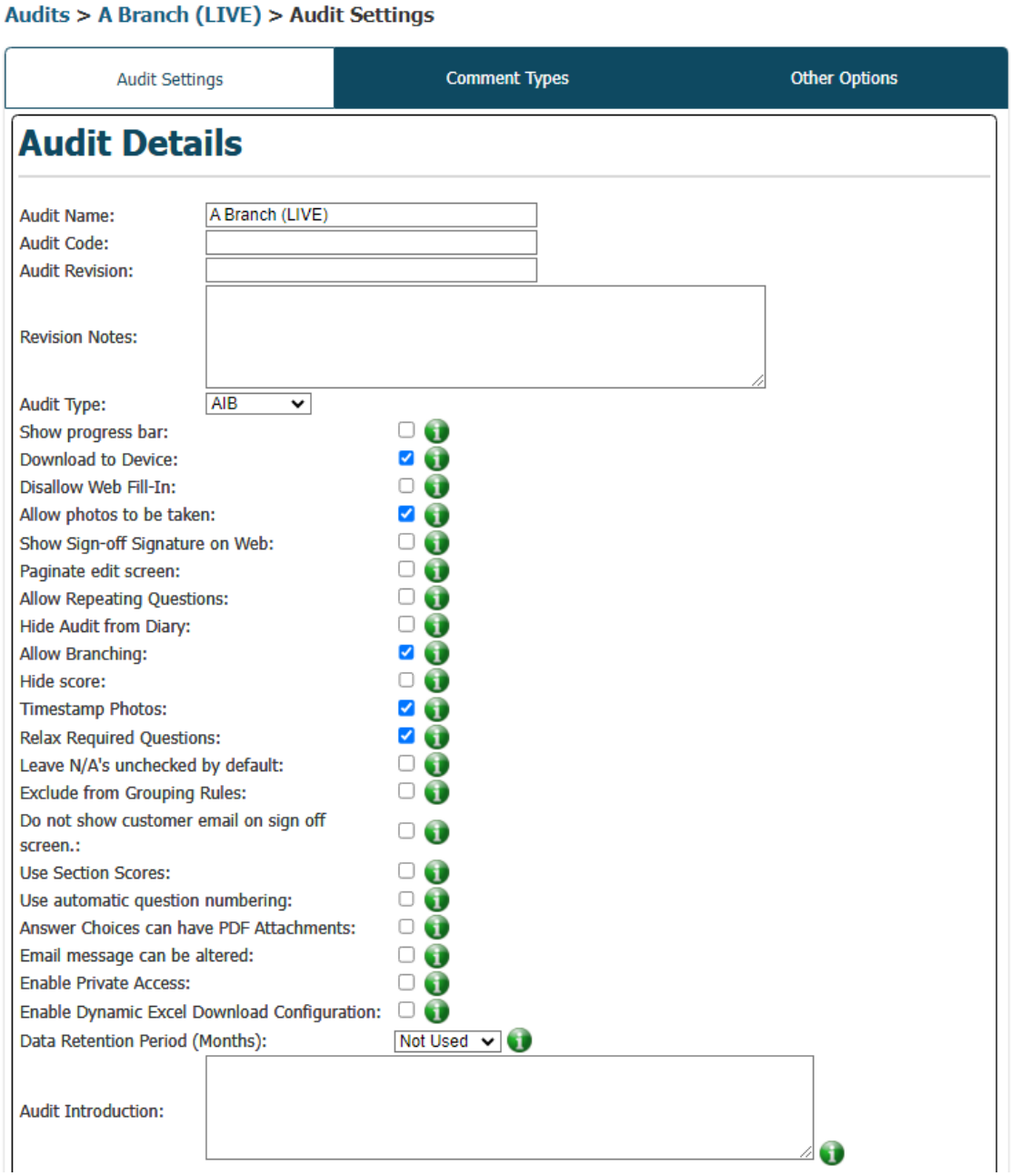
- The 'Audit Name' of the audit and the 'Audit Code'.
- The 'Audit Revision' and associated 'Revision Notes'.
- The 'Audit Type' defined earlier within the Audit Type Settings tab.
- The 'Show Progress Bar' option for use when filling in audits on the web.
- 'Download to Device' If you wish to see the audit on mobile devices for remote fill-in.
- 'Allow Photos to be Taken' If you wish to be able to upload photos on the web. If selected, this will give the web user the option to upload a photo on every question. If this is only required on some questions, then do not choose this option. This option can be done on a question-by-question basis.
- The 'Show Sign-off Signature on Web' option which displays a box on the sign off page of an audit for the auditor to put in a signature.
- The 'Paginate edit screen' is used on the audit edit screen to split up pages using the page breaks. This makes editing a large audit easier to manage. Large audits can take a long time to fully display all of the questions when editing.
- The 'Allow Repeating Questions' is there for you want to have questions or sections of questions that can be repeated. Repeating questions or sections need to be in their own 'page' on the website.
- The 'Hide Audit from Diary' option, if selected, causes the audit to be hidden from the diary statistics e.g., for where the audit is used for testing only.
- 'Allow Branching' which when enabled, allows the branch option to appear next to radio and multiple-choice questions to filter further questions based upon the branch option selected. Do not check 'Allow Branching' and the 'Allow Repeating Questions' options in the same audit.
- The 'Hide score' option will stop the score from showing for this audit on the completed audit screen and the default pdf report.
- The 'Timestamp Photos' option causes timestamps to be added to photos taken during the fill-in process for this audit when enabled.
- The 'Relax Required Questions' option allows the auditor to be able to skip required questions when filling in the audit. The auditor will not be able to publish it until these questions have been completed. Instead, an option will become available on the Publish screen to review required questions. Once all of the required questions have been answered, then the audit can be published.
- The 'Leave N/A's unchecked by default' option on selection will stop the website from checking the N/A's as the default option when commencing a new audit.
- The 'Exclude from Grouping Rules' option will over-ride the grouping rules identified in the 'Settings>Themes' section.

- There is by default a customer email on sign-off. This can be turned off by checking the 'Do not show customer email on sign-off' option.
- 'Use Section Scores' will give the user the option to create sections of an audit that will have their own scoring tables to view as well as colour coordinated percentages chosen by the user. These sections can also have sub sections.
- 'Use automatic question numbering' allows question numbers to be generated from the label numbers. These will be set when adding, moving and or deleting questions.
- Once section scoring has been turned on, colour percentage bands can be used for this audit that will over-ride the percentage bands set up in the 'Settings>Themes' section.
- Use automatic question numbering. This will renumber the questions under a section when changes are made to that section.
- Answer Choices can have PDF Attachments. This allows for pdf attachments to be added to an answer. When the audit is filled in and that answer choice is selected, the pdf attachment is sent along with the audit. This is useful when standard guidance needs to be followed and the actioner needs to know the correct procedures to follow.
- Email message can be altered. For example, if there is a particular issue that needs to be highlighted, then this can be done by adding a sentence or two about it in the email. The email shown is the information from the system template.
- Enable private access. Because of GDPR and data privacy rules, there is sometimes a need to create audits that must only be visible to certain approved parties. For example, a return-to-work audit may need an email to be sent to HR and no-one else. Anyone can raise the audit, but we do not want anyone else but HR to see it. The users that can access the audit is shown further down the settings page under 'Private Access Audit'.
- Data Retention Period (Months). This enables the administrator to define how long the system should keep these audits available. If set and the selected period has passed, all completed audits for this template will be removed.
- Enable Dynamic Excel Download Configuration. This allows administrators to edit the structure and order of the data printed to the audit based excel report. The summary excel report can be edited elsewhere in the settings area.
- The audit introduction. An audit introduction can be entered which will appear at the start of the audit report PDF details section and on custom PDF reports where required.

There are also audit settings for overriding the default:

- Global settings for logo.
- Percentage bands.
- Audit Email Text.
- An option to stop the corrective action report appearing for the audit.
- Locations

For Locations, after clicking on 'Show Locations', a full list of locations is displayed. Select the location that the audit can be used for. This makes sure that only audits appropriate for a location are displayed.



Click 'Update Audit Details' to update the above audit settings.

On the menu tabs listed at the top of the page are:

- Comment Types. This allows for the selection of additional comment types that can be used for this audit when resolving non-compliances.
- Other Options: Download Question Data. This provides on a spreadsheet, a list of every scored question and answer

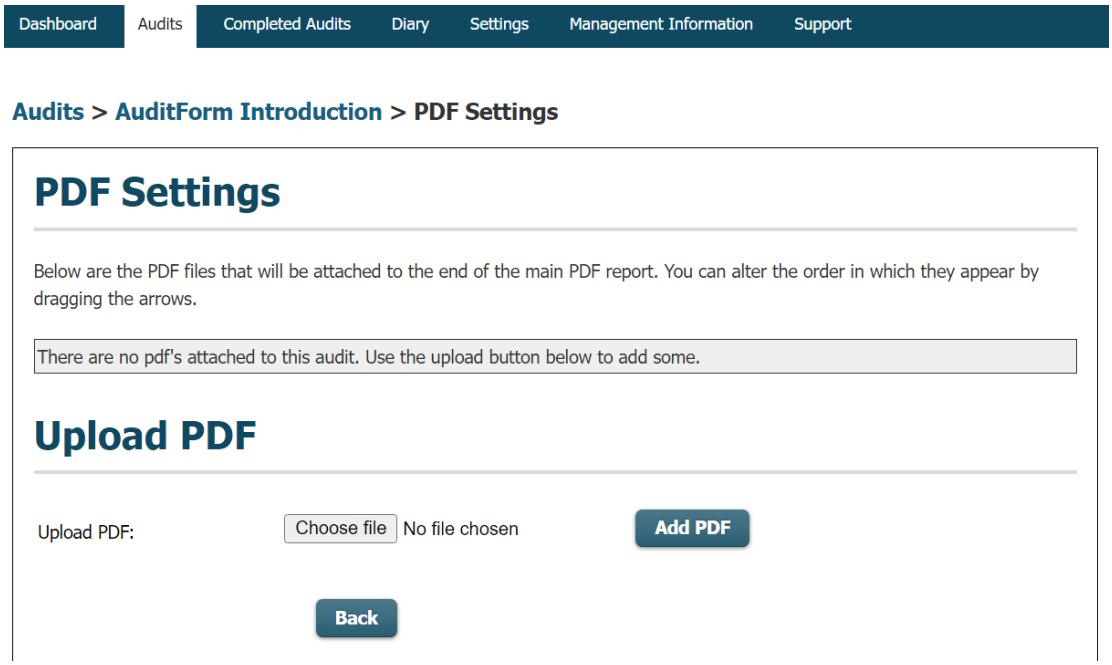
- Other Options: Download Audit Template. This is useful when a new audit is needed based on this audit. If there is a super user, then the template can be modified for the super user to reload a new audit template.
- Other Options: Export Audit. This allows the audit template to be exported for importing when creating a new audit.
- Other Options: Edit Language. This allows for further language changes specific to this audit.
- Other Options: Private Access Audit. This is used to define which users will be allowed to see this audit when the 'private access' is turned on for this audit. When set against an audit, users who complete audits will see only their own audit in areas such as completed audits, actions report, etc.
- Other Options: Dynamic Excel Download Configuration. Where the logged in user has access, this allows a user to alter the structure of the audit excel download which can be found on the completed audits page.

4.2.2 PDF Settings

This screen allows you to attach additional PDFs into the audit report. These will appear after the generated audit. You are able to add up-to three PDF attachments at a time.

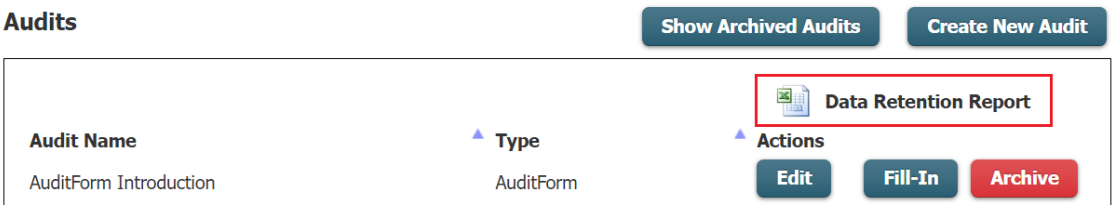
Once uploaded, you can re-order these PDF attachments simply by dragging and dropping the files to the desired position.

You add the PDFs by clicking the 'Browse' tab, selecting the PDF you want, and once it has loaded on the page, pressing the 'Add PDF' tab. If you don't press the 'Add PDF' tab, the selected PDF will not be added to the audit.



4.2.3 Data Retention Report Excel Download

This is a report that will appear on the Audit Page for administrators with edit audit permissions.



Audit details can be removed from the system using the Data Retention settings in the Audit Settings for administration users.

For GDPR reasons especially, there has been a request to make this new report available to save time checking through each audit used to see how long historical audits will be kept.

It is a simple excel report that shows what conditions audits are archived, to look like this:

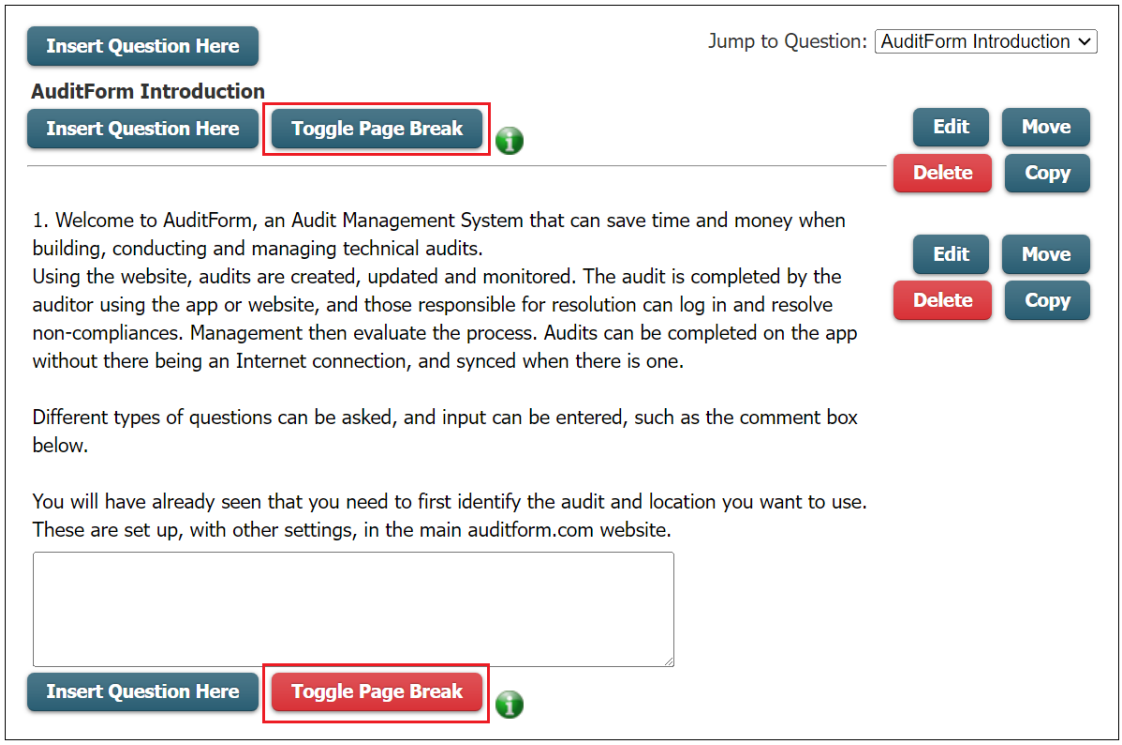
Audit Name	Retention Months
1 Completion of Training	36
1 Customer Complaint	0

The option will be available to authorised users on the Audit screen.
Note: Retention months of 0 against means that data retention criteria have not been set up for that audit in the audit settings.

4.2.4 Maintain the Audit

When building up an audit, questions can be inserted, edited, moved, copied, deleted, and put into sections that can be repeating sections.

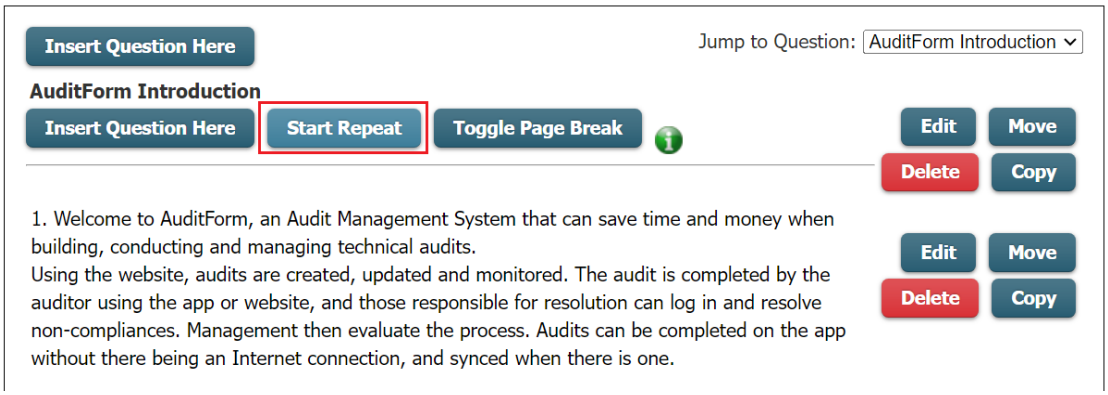
A section typically consists of a label, a series of questions terminated by a toggled page-break. The page break can be toggled through the use of the “Toggle Page Break” tab. The page break moves questions after it to a different page, keeping the audit tidy. Below is an example of what the ‘Toggle Page Break’ looks like. Toggle page breaks that are red are active and those which are not are inactive.

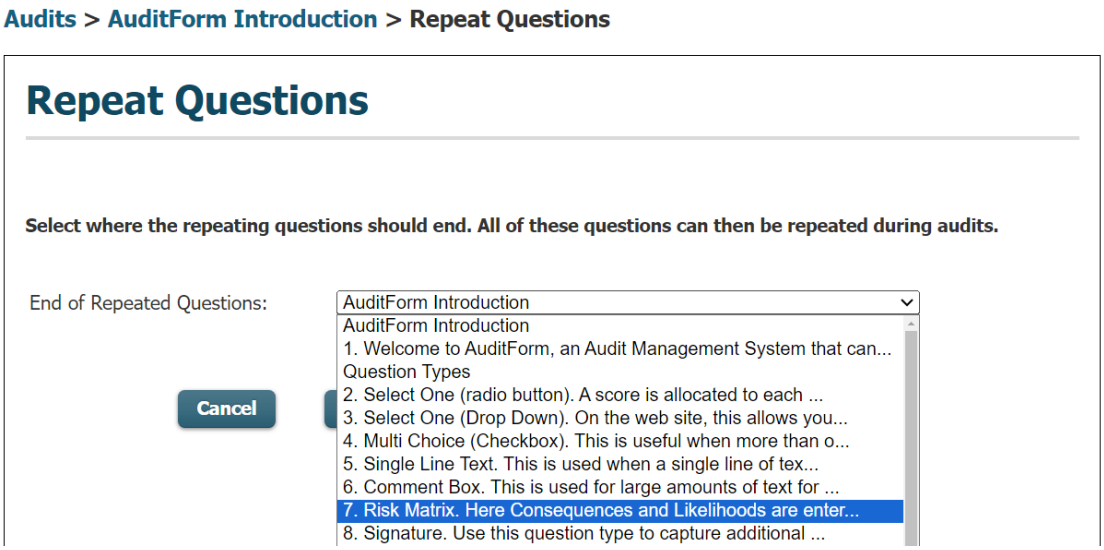


To create a repeating section, click on 'Start Repeat', you will then be asked which question you want to end the Repeat and you select it. It is best to create the repeating sections or questions once you have finished creating your audit.

If you want to be able to create repeating sections, you must have "Allow Repeating Question" checked in the Audit settings.

Below is an example of what it might look like to create a repeating question section.





Further details regarding adding and editing questions are explained below.

If the 'Allow Branching' option is turned on in the audit settings, then a 'Branch' button can be selected for questions with alternative selections. On selecting the branch, identify which questions will be branched to. The branching is ended by a 'Page Beak'.

If for example we had the following audit.

Q1. What is your favourite colour?
Red, Green, Blue, None of the Above.
Q2. Red Question only
Q3. Green Question only
Q4. Blue Question only
Q5. Other Questions.

When filling in the audit (on the app and the website), if you select for Q1:

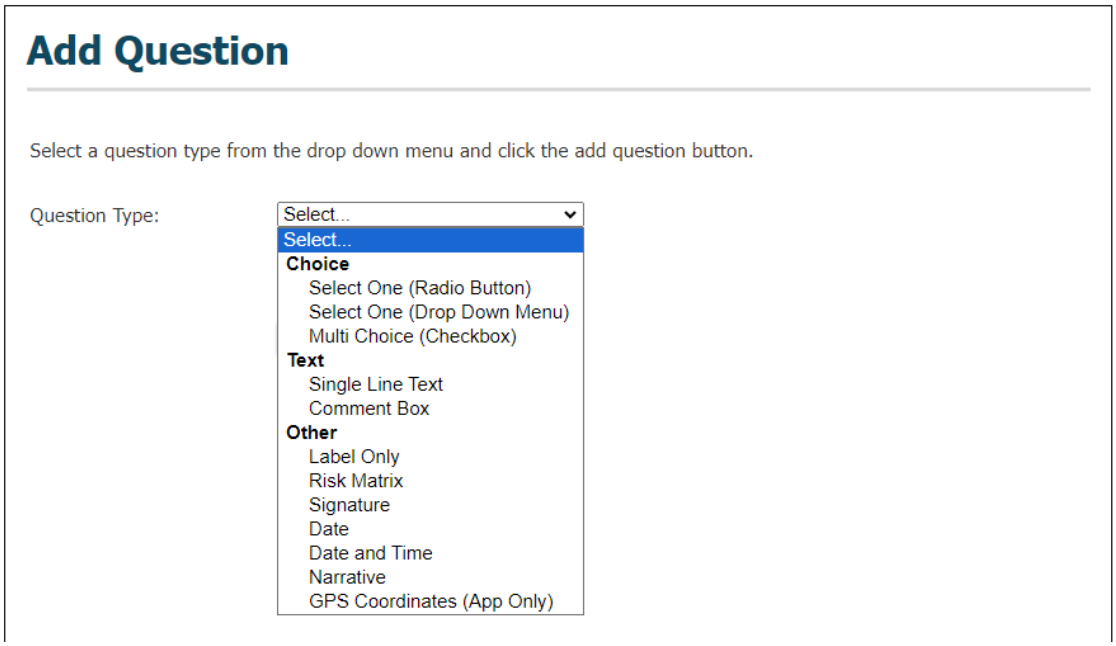
- Red: Then Q2 and then Q5 appears.
- Green: Then Q3 and then Q5 appears.
- Blue: Then Q4 and then Q5 appears.
- Red: Then Q5 appears.

It is also possible to have branched questions within branched questions.
Note. A good alternative to branching is to use conditional questions. Here, a question is shown depending upon an earlier question's answer. So, if the answer to a question 'Is asbestos known to be present?' was 'Yes', then specific questions further down the audit would be conditionally shown due there being an asbestos presence. Read further down for more information.

4.2.4.1 Add Question

If the 'Insert a Question Here' button is selected the 'Add Question' screen is shown. The user is then asked to select a Question Type.

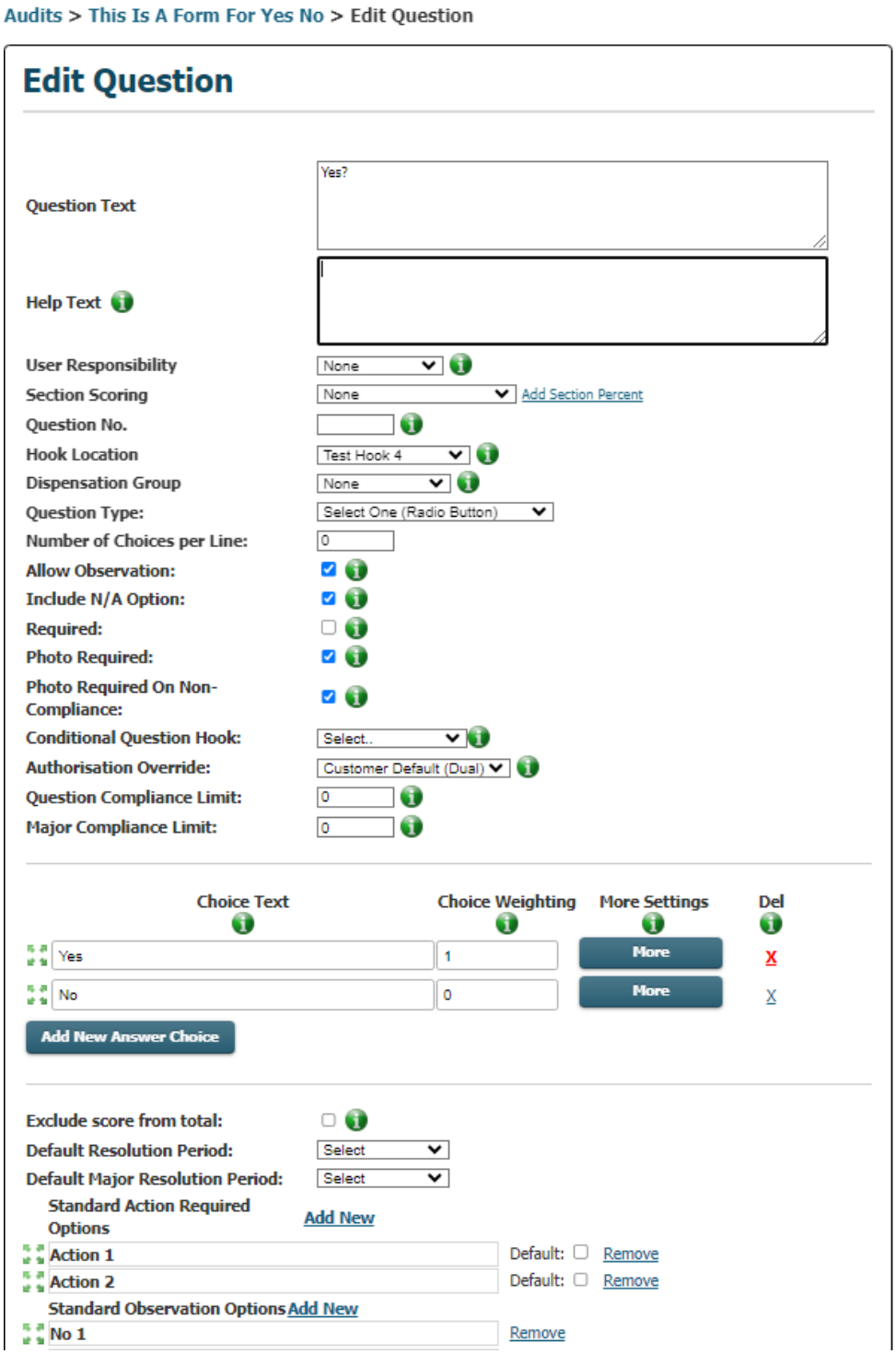
There are a number of different question types that you can use to build your audit. Remember, these questions will show over the Internet and on your handheld devices.



The question types available will continue to change as more are added to over time.

4.2.4.2 Edit Question

Clicking on the 'Add Question' tab in the 'Add Question' screen or the 'Edit' tab on the Audit screen creates the question and then takes you to the Edit Question screen.



Each section looks better if it is headed with a 'Label' question.
These are useful to split the audit into sections and when using the 'App' to move between sections.

The 'Select One (Radio Button)' option question and the 'Select One (Drop-Down Menu)' option question are used when the user is only allowed to select one answer from a list of answer choices such as Yes, No or N/A. The 'Radio Button' option is useful for web entry for a small number of answer choices in that it takes only one click to make the answer. The 'Drop-Down Menu' option is useful for web entry when there are a large number of 'answer choices', in that a drop-down doesn't take much room on the page.

The 'Multi Choice (Checkbox)' option allows the user to select a number of predefined 'Answer Choices'.

The 'Single Text Box' option is used when a single line of text is needed. If a numeric answer is needed, then this can be optionally validated

The 'Comment Box' option is useful when a large amount of answer text is needed.

The 'Signature' option can be used to capture signatures or sketches. It consists of a box where a signature/sketch can be entered.

The 'Date' option is designed for date entry using a calendar if needed.

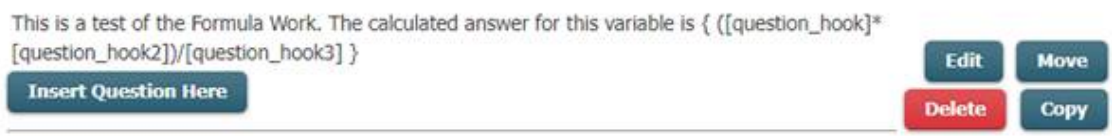
The 'Date and Time' option allows for:

- Automatic display of current date and time if required selected.
- Entry of data and time if not required.

The 'Narrative' option allows an explanation to be displayed without the need to answer a question.

It also allows a calculation to be made within the question.
The calculation will depend upon answers entered earlier in the audit.
It uses numeric question/answer choice hooks with an answer score or for a numeric question
The narrative would include the answer wherever square brackets indicate a formula.
The answer would use a formula using a calculation based upon '(', ')', '+', '-', '/', '*', [question_hook] and the digits 0 to 9 enclosed in curly brackets.

For example, the questions might look like:



The Calculated Question Type should also have a page break beforehand so the scores can be submitted before the calculation is made.

When filling in the audit, if the question_hook contained '**6**', question_hook2 contained '**2**' and question_hook3 contained '**4**', the answer of **3** would appear like:

This is a test of the Formula Work. The calculated answer for this variable is 3

4.2.4.3 Question Scoring Rules

Each 'Answer Choice' is scored. The maximum score contributes to the maximum score available for the audit. Each score is measured against the Question compliance or major compliance limit to identify the answer's compliance.

The score of a 'Multiple Choice' is the sum of the answer option scores chosen.

The score of a 'Risk Matrix' is the likelihood score selected multiplied by the consequence score selected.

Labels, narrative and comment questions are not scored.

You can choose whether to exclude the question's audit score from the audit total.

There are also hooks that will impact the audit scoring such as the following:

- **Killer:** killer_question
- **Killer:** killer_section
- **Killer:** killer_sub_section

If a question is answered as non-compliant with the killer_question hook, the total audit score will be set to 0 automatically.

If a question is answered as non-complaint with the killer_section hook, the section the question is part of will be set to 0 automatically.

If a question is answered as non-complaint with the killer_sub_section hook, the sub section the question is part of will be set to 0 automatically.

The question compliance limits are used to identify whether the question is complaint or not. If the score is less than equal to the compliance limit, the answer is viewed as non-complaint. If the score is less than or equal to the major compliance limit then the answer is viewed to be major non-compliant.

4.2.4.4 Question Details

The Question No. if entered will appear in front of the audit question.

If 'Hooks' are used, then a 'Hook Location' entry will be available. These are used in custom templates where the question/answer against a defined 'hook' can be pulled into the custom report in a particular position.

Standard hooks have been set up that will display additional information entered against a question in the Completed Audits screen headings:

- **Ref #:** ca_ref and ca_ref_bold
- **Audit Name:** ca_audit and ca_audit_bold
- **Location:** ca_location and ca_location_bold
- **Date:** ca_date and ca_date_bold
- **Status:** ca_status and ca_status_bold
- **Auditor:** ca_auditor and ca_auditor_bold
- **Score:** ca_score and ca_score_bold

The _bold hooks show the hook details in bold.

The 'Number of Choices per line' helps to configure the question layout. If there are a few words per answer choice, then it is better to set this to 1.

The 'Allow Observation' setting makes the observation box appear.

The 'Include N/A Option' makes sure there is always a N/A Option available which becomes the default if the question has not been answered.

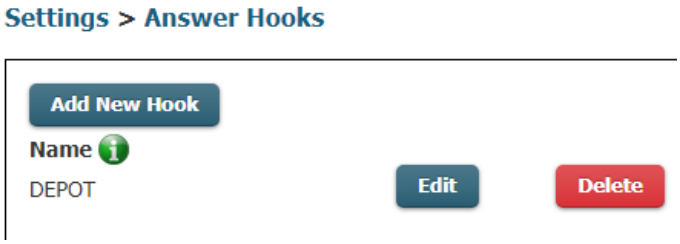
The 'Required' option makes sure that this question is answered. If the 'Relax Required Questions' setting in the audit settings is selected, then this will be at the publishing stage, otherwise it will be at the answer question stage. If the question is skipped by not going to that section for example, then the audit still cannot be published until that question has been answered.

The 'Photo Required' option is similar to the 'Required' option in that the audit cannot be published until a photo has been taken for that particular question.

The 'Photo Required On Non-Compliance' option operates much like the photo required option. Where this differs is this required photo only gives a user prompt where the question has an action.

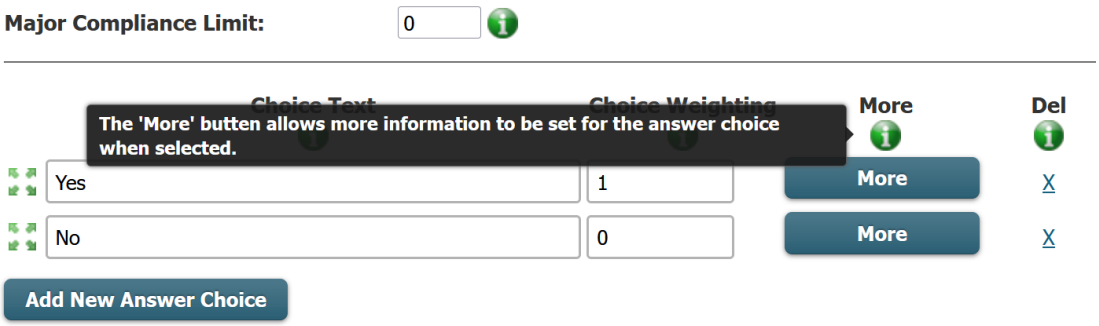
The 'Conditional Question Hook' enables the audit to show questions depending upon a previous answer selected.
This is an alternative method of showing conditional questions to the branching functionality.

This feature enables an answer being made at the start of an audit resulting in questions later in the audit appear conditionally upon that answer.
To enable this, for example, first set up an answer hook in Settings: Eg 'DEPOT'

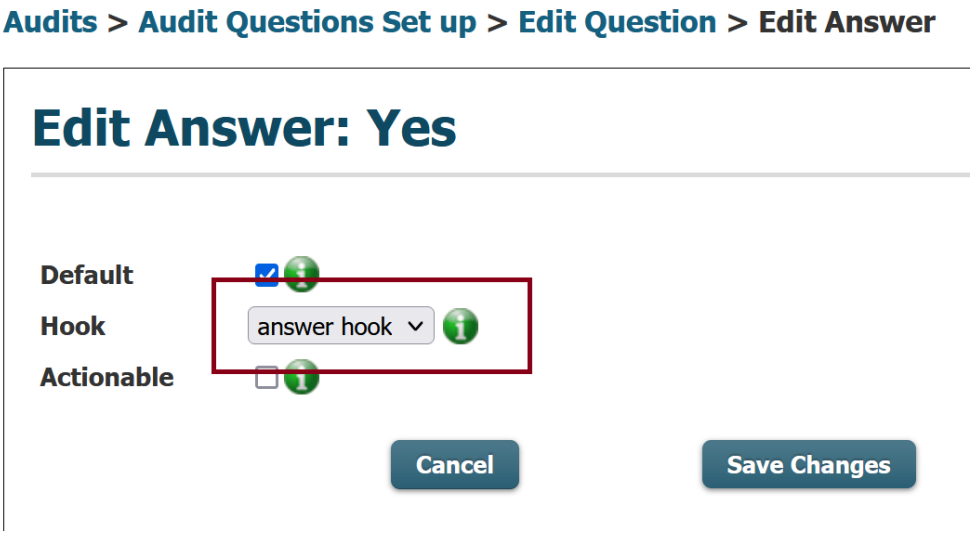


Then link this answer hook to an answer.

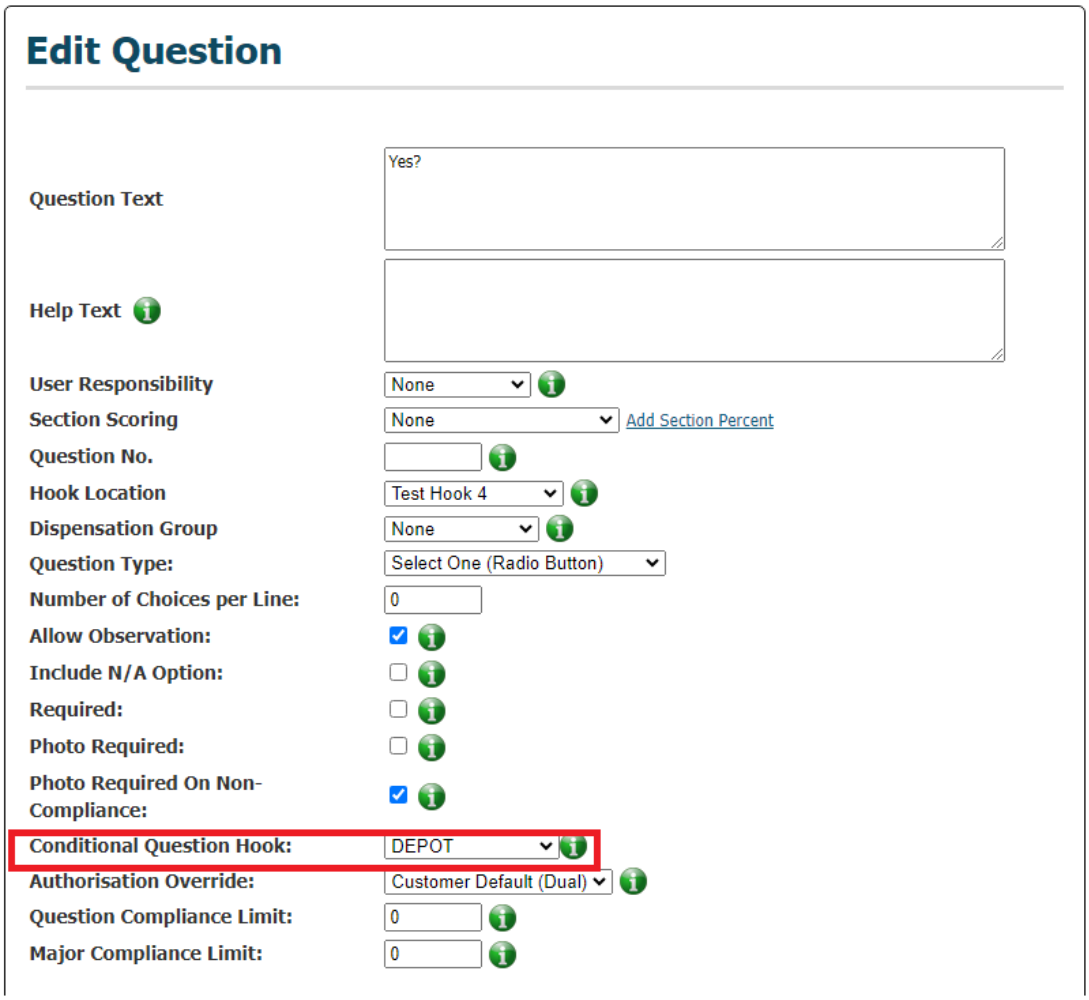
To add the hook to an answer, click on 'More' against that answer choice:



Then select the hook that you would like to attach:



Then link this dependency to affected questions that need to be shown if this dependency is selected.



Note. It is important to have a toggle page break before and after these conditional questions to make sure they are only seen on the website when selected.

A default resolution period for major non-compliances and non-compliances for each question. This means that when someone fills this audit in and answers that question as non-compliant, the due date will default to today plus the period you have selected.

There are some situations where authorisation has been set up for an audit, but this needs to be over-ridden for particular questions. In particular where single authorisation is in place, but certain questions need further authorisation before it can be signed off.

So, an 'Authorisation Override' setting of 'Dual' or 'Single' appears against the question.

By choosing this setting, dual authorisation can be made to be required when single authorisation has been set in the settings.

Question compliant limits are used for working out whether an answer is non-complaint or major non-compliant based on whether the scoring is greater or equal to

the question answer score selection. For multiple choice questions, the compliancy score comparison is against the sum total of the answer choices selected.

'Standard Actions Required' and 'Standard Observations' can be set up for selection instead of typing in text. You can select a single or multiple responses when answering questions where the answer is often in a common format. Clicking 'Add New' allows the administrator to add new Options, and 'Remove' allows for the removal of options. These options are now also orderable. Move your mouse cursor over the option you wish to move and hold the left mouse button and drag / drop to the position desired. Note. Make sure that the 'Allow Observation' box is checked if standard observations are to be used.

It is possible to set up a default 'Action Required' by clicking on the 'Default' check box against each action that needs to be displayed on a non-compliance.

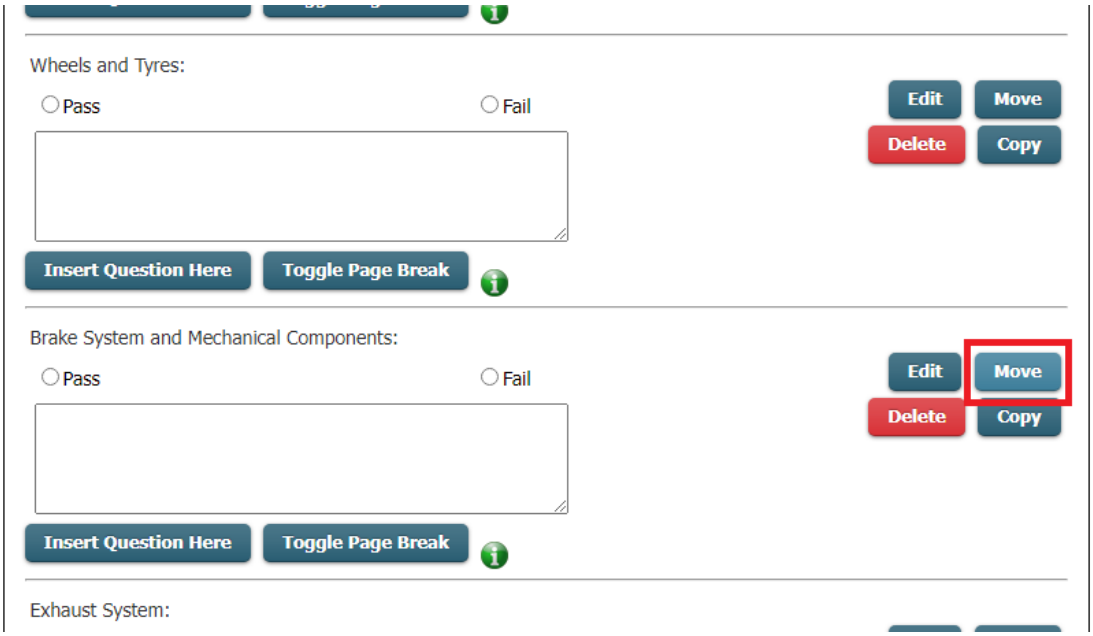
By clicking 'More' and clicking 'Actionable', then the option will require actions to be completed if selected, even if this action is compliant. Answers Hooks (only shown if used) makes it easier to categorise audit answers.

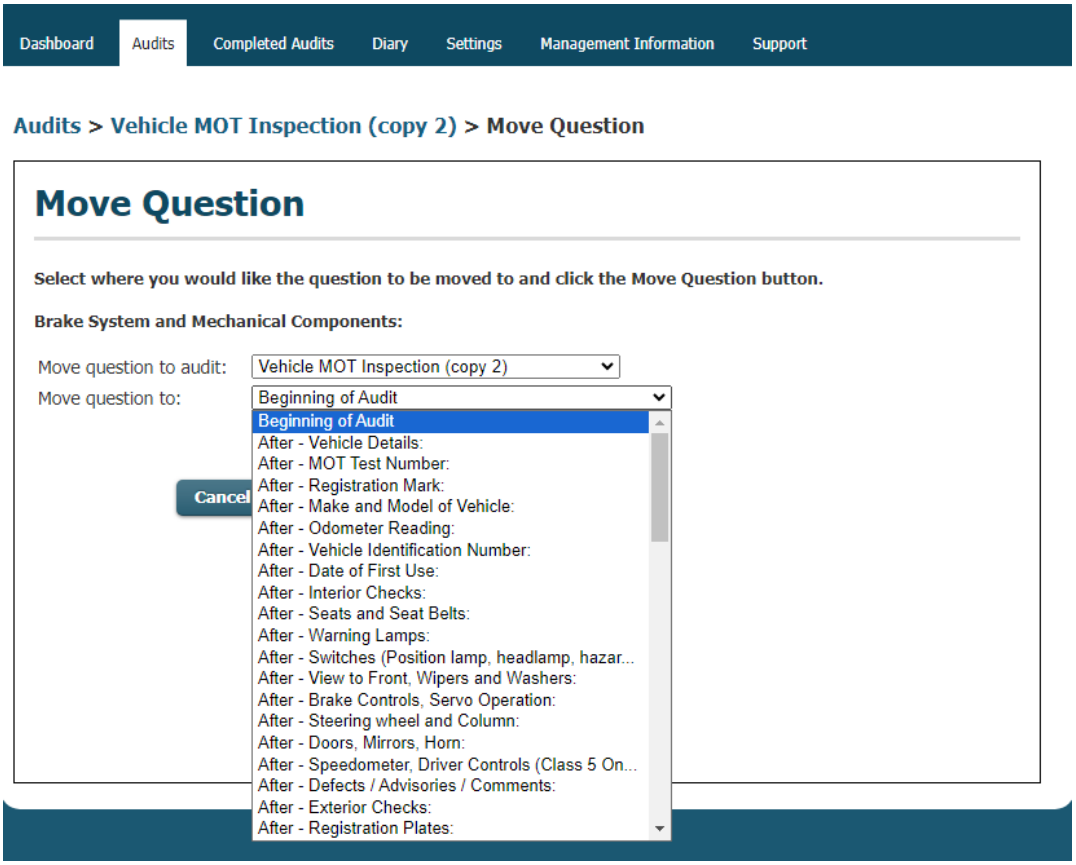
Files can be attached against a question for web-only audits. Unfortunately, this feature is unavailable for mobile devices because of potential issues in the sync process.

Once the audit is set up and in use, do not edit a question unless necessary or else it may invalidate previous answers for this question. It may be better to copy the audit and work on the updated audit version.

4.2.4.5 Copying and Moving Questions

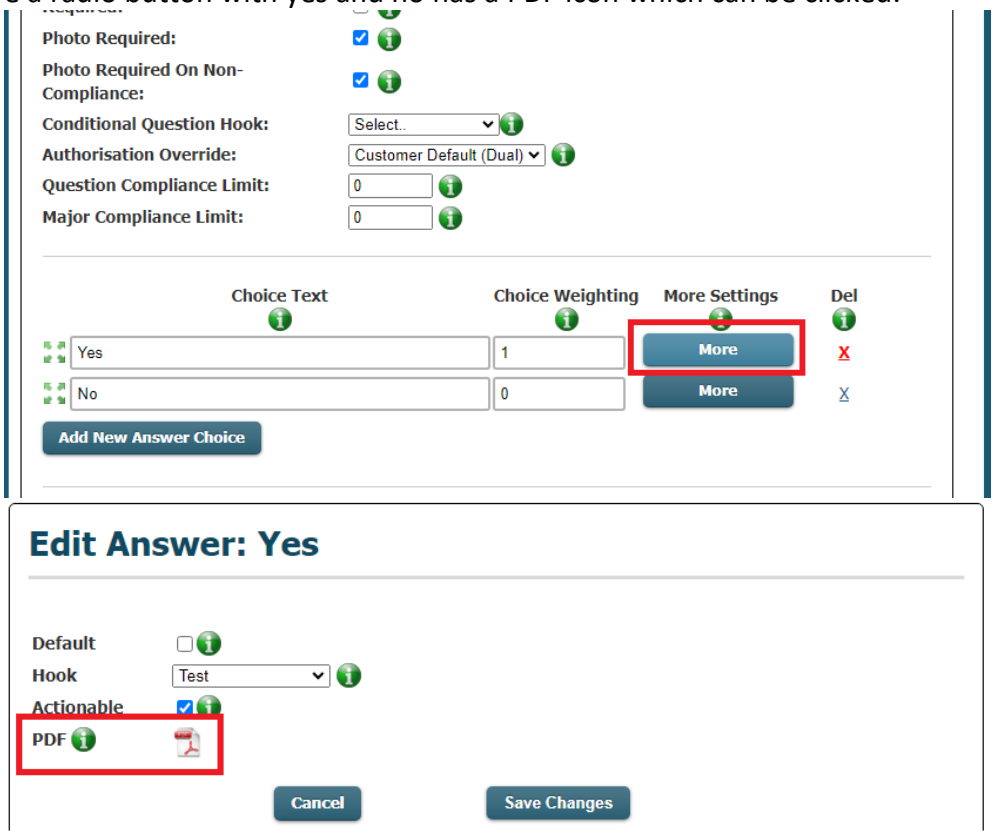
When creating a new question, it can be easier copying a question from this or another audit.
First of all, click Copy on a question. This will allow you to make an edited copy of the question you are copying. Then click on Move to take you to a screen that will move this question to another position in this audit or another audit:


Wheels and Tyres:
Pass
Fail
Edit
Move
Delete
Copy
Insert Question Here
Toggle Page Break
Brake System and Mechanical Components:
Pass
Fail
Edit
Move
Delete
Copy
Insert Question Here
Toggle Page Break
Exhaust System:


Dashboard
Audits
Completed Audits
Diary
Settings
Management Information
Support
Audits > Vehicle MOT Inspection (copy 2) > Move Question
Move Question
Select where you would like the question to be moved to and click the Move Question button.
Brake System and Mechanical Components:
Move question to audit:
Vehicle MOT Inspection (copy 2)
Move question to:
Beginning of Audit
Beginning of Audit
After - Vehicle Details:
After - MOT Test Number:
After - Registration Mark:
After - Make and Model of Vehicle:
After - Odometer Reading:
After - Vehicle Identification Number:
After - Date of First Use:
After - Interior Checks:
After - Seats and Seat Belts:
After - Warning Lamps:
After - Switches (Position lamp, headlamp, hazar...
After - View to Front, Wipers and Washers:
After - Brake Controls, Servo Operation:
After - Steering wheel and Column:
After - Doors, Mirrors, Horn:
After - Speedometer, Driver Controls (Class 5 On...
After - Defects / Advisories / Comments:
After - Exterior Checks:
After - Registration Plates:
Cancel

4.2.4.6 Answer Choice PDFs

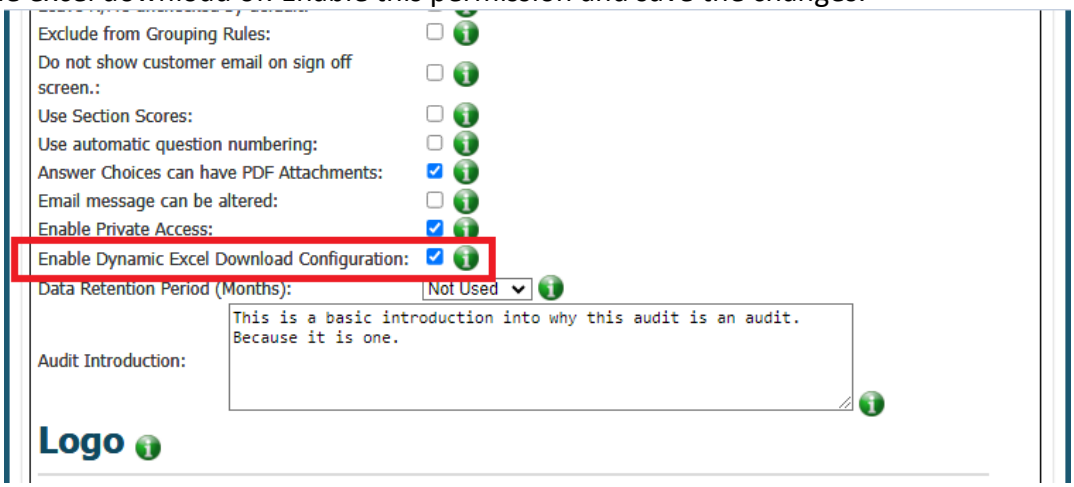
PDF attachments can also be added to a specific answer choice where said setting has been enabled in the audit settings previously discussed. This will look like the following, where a radio button with yes and no has a PDF icon which can be clicked.



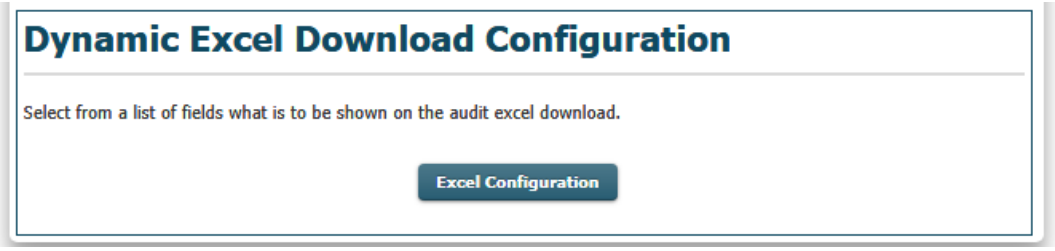
Once this icon is clicked, the user will be taken to an area where PDFs can be added and managed for this answer choice.

4.2.5 Dynamic Excel Download Configuration

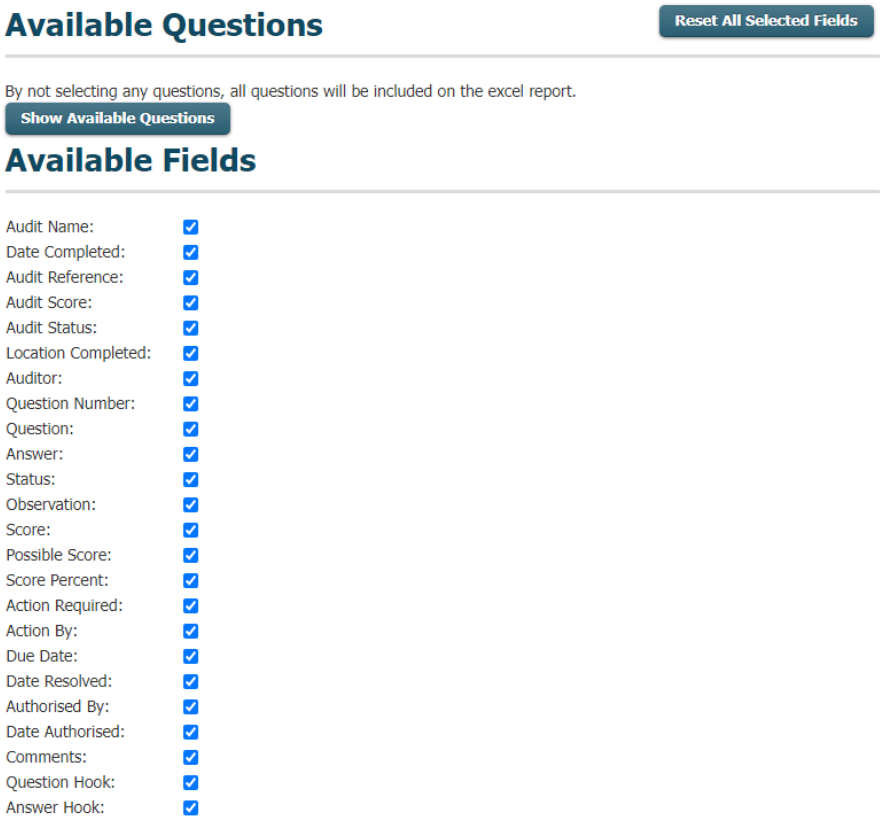
To use this functionality, navigate to the audit settings of an audit you wish you edit the excel download of. Enable this permission and save the changes.



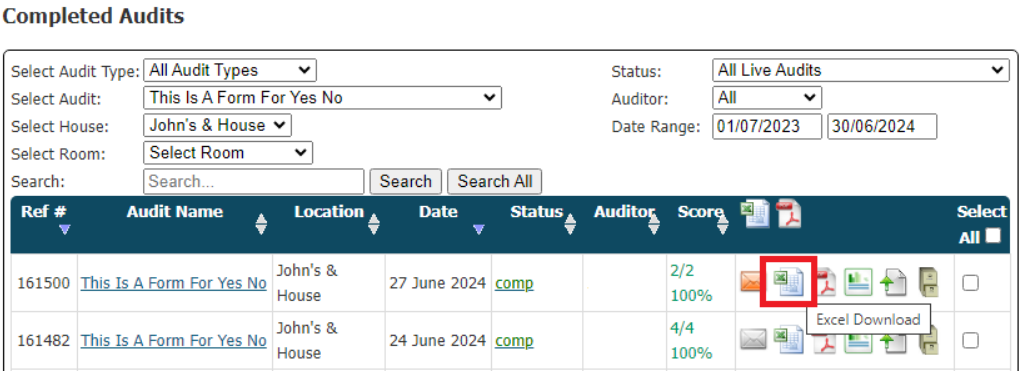
Once saved, navigate to the audit settings and click the tab “Other Options” and click “Excel Configuration”.



This page, while similar to the Excel Summary Report Download Configuration, has more audit detail focused fields. Here you can select which specific questions you wish to see (it defaults to all if not set), what fields you want to include, and what order these fields should be in.



When you have finished selecting and ordering the fields, click “Save Changes”. This customised excel report can be found on the completed audits page as seen below.



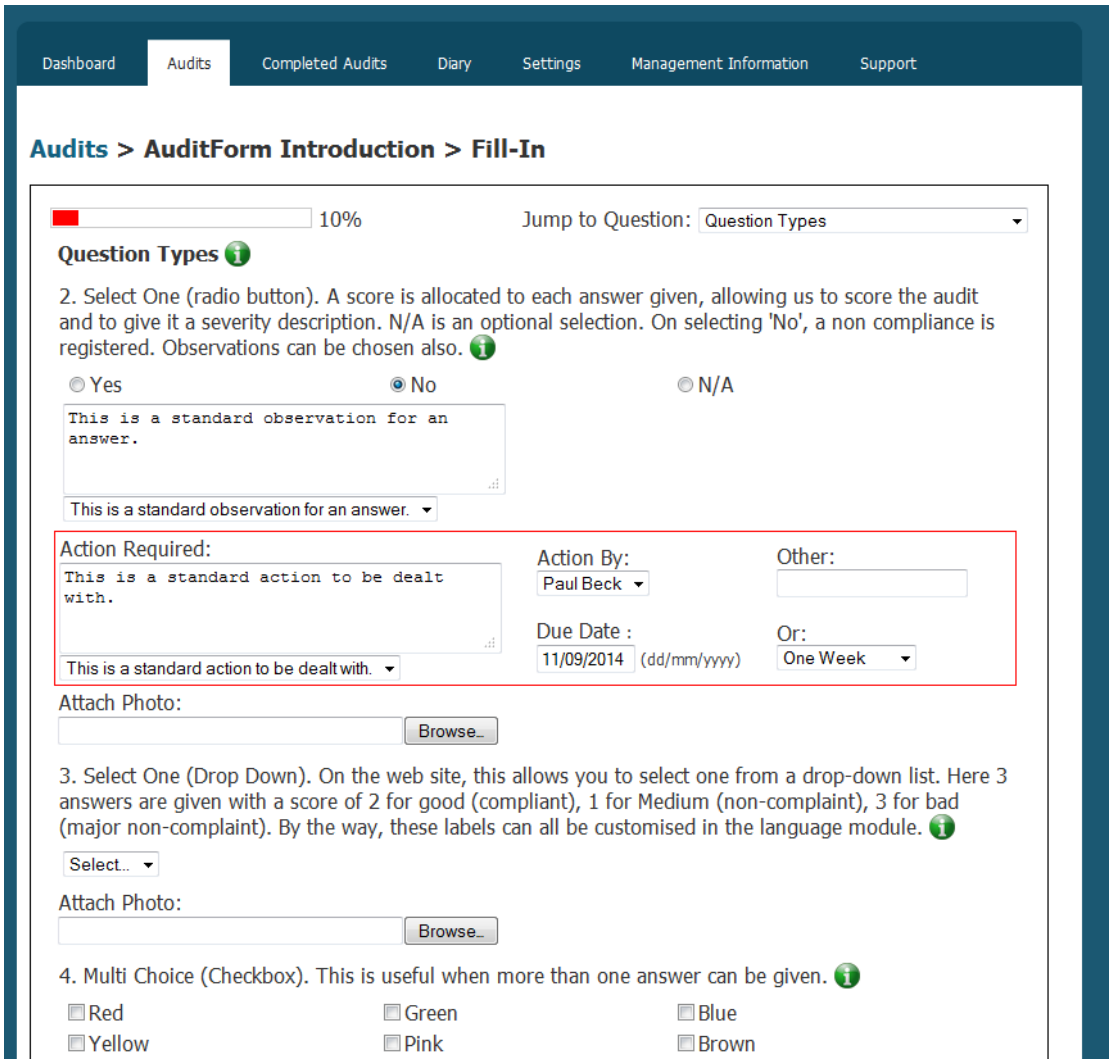
4.3 Fill In Audit (Web Browser)

Selecting the 'Fill-In' tab allows the user to complete the audit online through their web browser.

On selecting 'Fill-In' the user is asked to select the location against which the audit is being completed and after the desired location is found, 'Continue' is selected. This can be a location from any of the location levels that you have in your system.

Here you can see the questions as they were designed.

If a selection is made which makes the answer to that question non-compliant, the auditor will be prompted to identify what action is required, who should deal with it and when it should be resolved by.



As well as being used to address the non-compliance, the answer will be contained in the Corrective Action Report as well as shown in the Audit Report PDF, both available from the **Completed Audits** screen.

The user can navigate around the audit using the 'Jump to Question' tab at the top right hand corner of the screen.

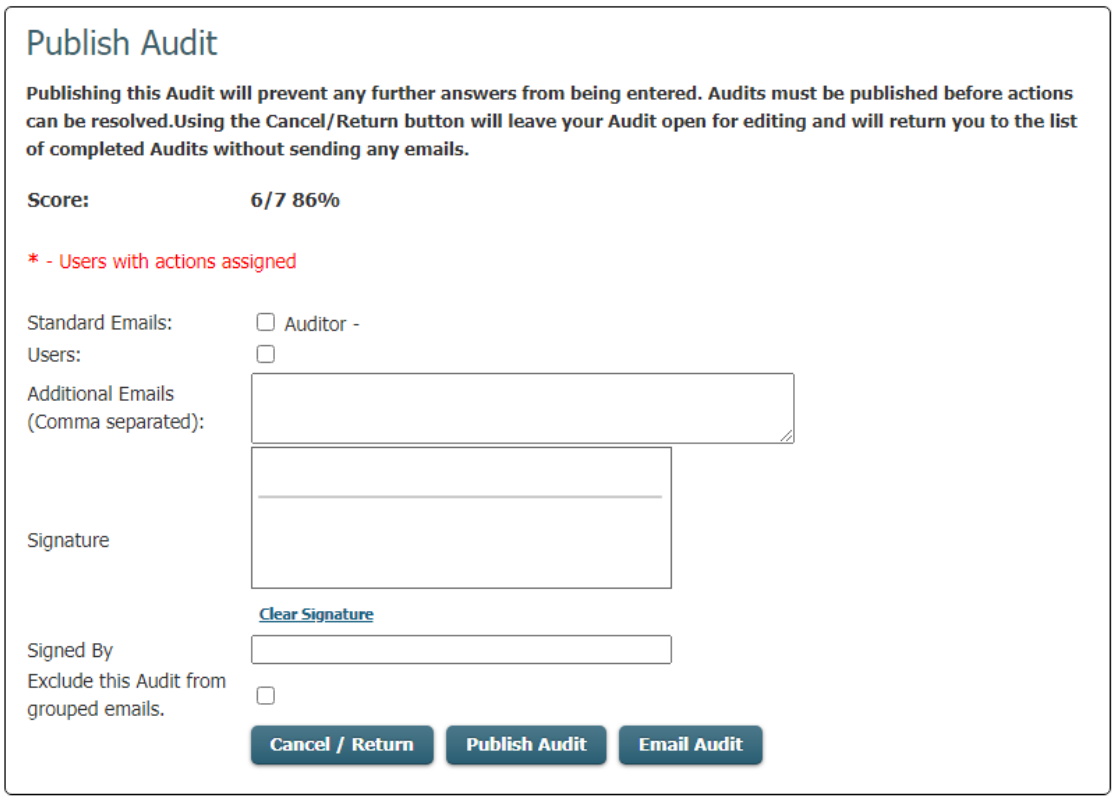
Clicking on 'Finish' at the bottom of the audit page will skip to the end.

The option will then be given to 'Cancel/Return', 'Email Audit' or 'Publish Audit'. However, if there are unanswered required questions, the user will be prompted with the message 'You have required questions that have not been answered. Please go back and answer these questions.' and the 'Publish Audit' tab is not shown.

Unanswered questions are also available for review.

An online signature can be made to sign off the audit when publishing. Other signatures can be added as audit questions. Where actions have been assigned to people and if the theme 'Audit users actions' setting was checked, then their email address will automatically be selected. If the field 'Signed By' is filled in, this input will be displayed alongside the signature on the completed audit PDF.

This Is A Form For Yes No > Publish Audit (161499)



4.3.1 Cancel/Return

Selecting this will save your progress and then returns you back to the **Completed Audits** screen. You are then able to use the **Edit** icon (described in section 5) to continue entering the Audit at a later time.

4.3.2 Publish Audit

Selecting this will set your audit as 'published'. Once an audit has been published, you can no longer alter the answers provided. This is so that the audit cannot be manipulated into producing a better score. Publishing an audit also emails it.

4.3.3 Send Email

At this stage an audit can be sent to the appropriate parties. If a batch of audits is being filled-in at the same location over a period of a few days our system is able to group them together when an email report is sent. This audit grouping feature is managed via the Theme Settings (described in Section 3.4).

The corrective action report and audit will be sent to the people specified by the auditor. Other email addresses may be added (please read the on-screen instructions for this).

A Corrective Action Report (CAR) and an audit report will be sent to the email addresses selected. The text shown is as specified in the Settings page of the system.

4.4 Archiving Audits

Should the user wish to remove an audit from the list of live audits, they can press the "Archive" tab. This removes the selected audit from the other audits, and adds it to a separate list where audits that are no longer used are kept. These audits can be edited just like the live audits, and even reinstated to the list of live audits if needed, but cannot be filled in, and attempts to do so simply result in the audit jumping to the end and it doesn't allow you to answer the questions. Storing them this way instead of deleting them allows them to be used for reference as well as keeping audits done using that particular audit compatible.

You can access the list of archived audits by pressing the "Show Archived Audits" tab, which is next to the "Create New Audit" tab.

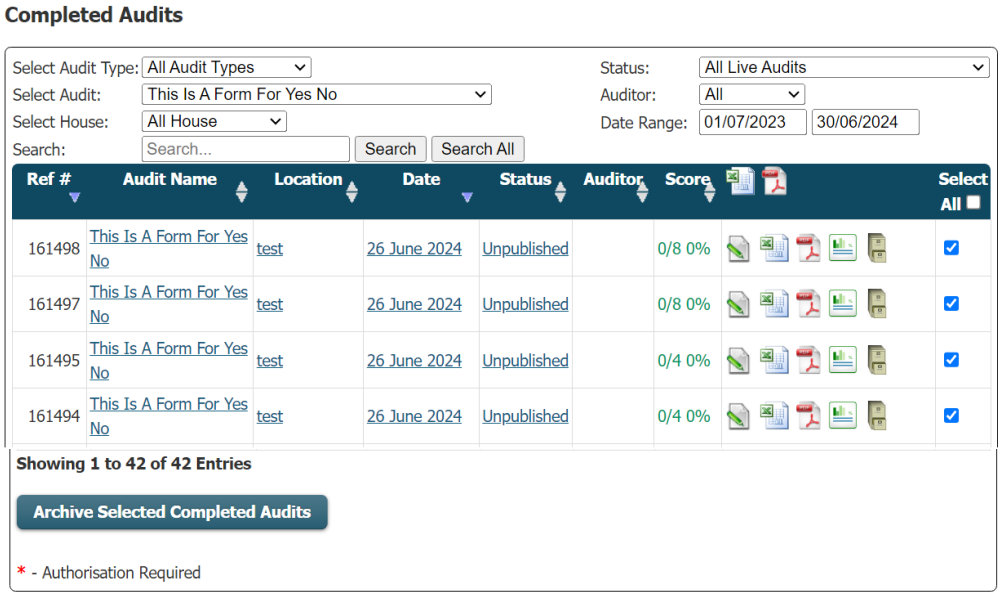
Archived Audits can be reinstated by pressing the "Re-instate" tab.

4.4.1 Bulk Archiving Audits

Bulk archiving of completed is also available to reduce the time taken to archive large quantities of completed audits. Similar to archiving, the user performing archiving tasks needs to have the relevant archive permission found in the users settings page.

On the completed audits screen, when 'Bulk Archive' is turned on in user settings, select which completed audits are to be archived using the checkbox on the far right. Then navigate to the bottom of the completed audits screen.

At the bottom left of the screen is the button 'Archive Selected Completed Audits'. When pressed, all selected completed audits will be archived. Example images can be found below.

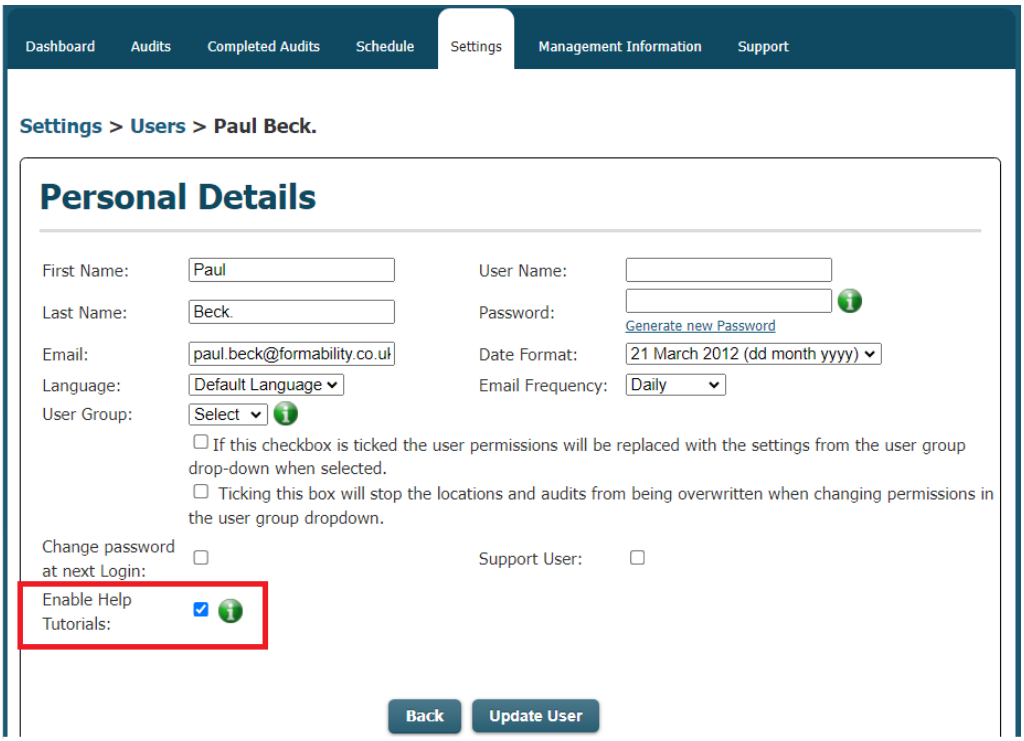


5 Help Tutorials

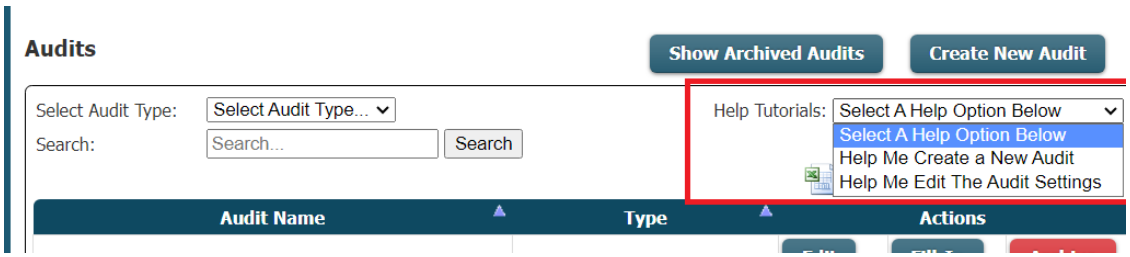
Enabling and using the help tutorial functionality is explained in this section. At the moment, the available help tutorials are limited to the audit and audit editing areas of AuditForm.

5.1 Enabling The Help Tutorials

Help tutorials are available on a per user basis, are can be enabled on the user settings page. Select "Edit" on a user, and navigate to the place shown below.

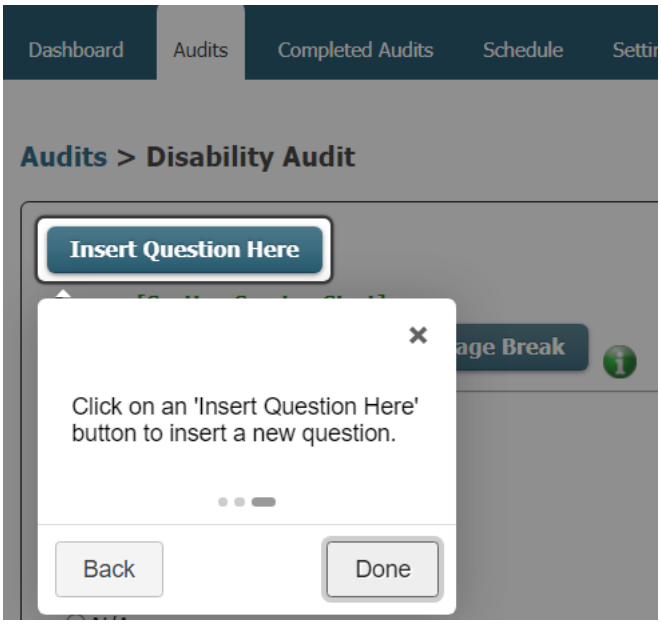


Tick the checkbox highlighted in the red box, and save these changes. With this permission applied to this user, when this user logs in and navigates to the audit or edit audit areas, a new selectable menu will be present at the top right of these two pages.



Each tutorial will give a slightly more directed tutorial, guiding the user to certain pages and page inputs, and is meant to complement the existing user guide which may include more details that are not covered by the current help tutorial selection.

Upon selection of a menu item, a new box should appear presenting the user with text and directions. An example can be seen below.

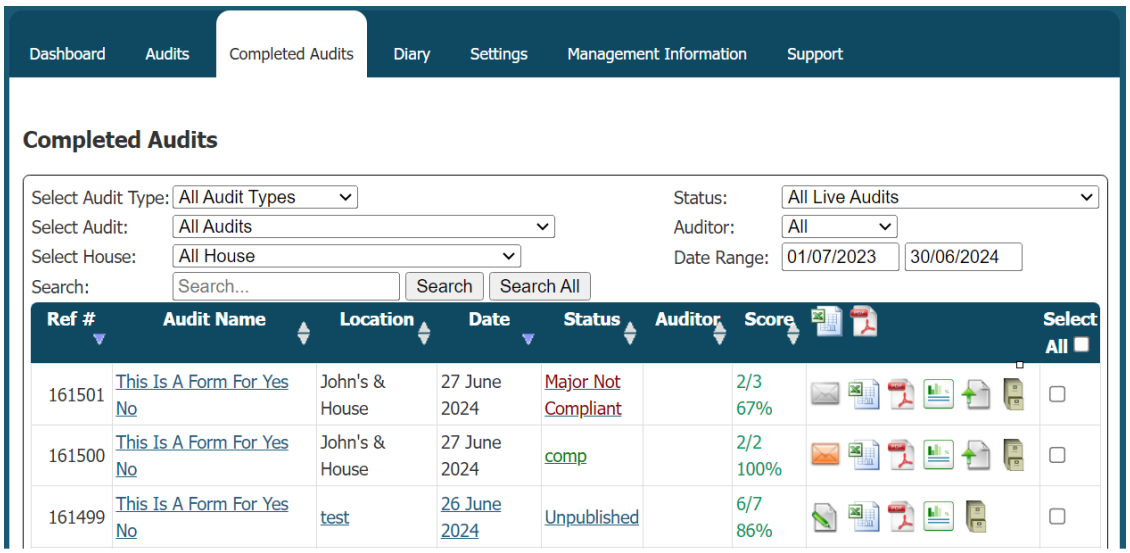


We will look into expanding the help tutorial functionality in the near future to assist in areas such as; audit fill in, resolution of actions for non-compliant audits, and management information functionality such as trends.

6 Completed Audit Resolution

Completed audits are reviewed in this part of the system.
The auditor is taken to this screen after completing an audit online, but more typically this screen is used when a user needs to review non-compliances or authorise actions taken.

6.1 Completed Audits Screen



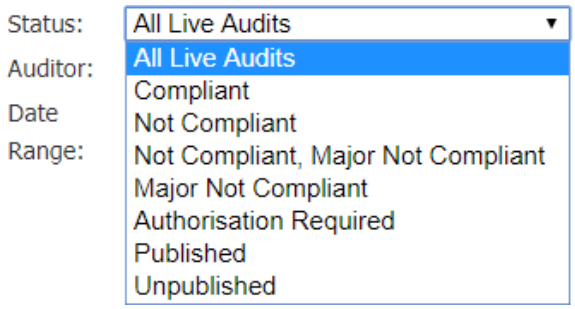
On selecting the 'Completed Audit' tab, the user can complete a number of selection criteria/filters to arrive at the audits they want to see providing that they have access rules set up to see the locations.

Audits that have met the selection criteria are listed.

These criteria are:

- What Audit does the person want to view, is it just one specific audit or every audit?
- Do they want results from one specific location in a region, every result from a region or results from every region?
- What variety of audit do they want to see, Compliant, Non-Compliant, Major Non-Compliant, Authorisation Required or Archived?
- Do they want to see results from just one auditor or all the auditors?
- What time frame do they want the audits to be from?

Completed Audits screen: Status filter option
The status filter returns audits according to the filter selected:



The **Miscellaneous > 'Default to All auditors in Completed Audits'** permission determines whether the Auditor drop-down option will default to 'All' or the name of the logged-in user.

Search Button

The Search button on the completed audit screen is currently used to search for reference numbers and answer text in hooked questions with answers. When a large selection of audits is being searched, this can take a long time to complete, when most of the time, it is just the reference number being searched for.

There are 2 search buttons.

Search for Reference Number and Search for All.
The Search All button searches for the search text in any answers for questions and question answers that have hooks against them.

There are a number icons available against the audit:

- Enables the auditor to edit the audit if the audit has not yet been published. If it has been published an email icon will be shown instead which can be used to send further email reports.

- For published emails, allows an email to be sent out. This colour means that an email has already been sent out for this audit reference.

- As above, but shows no email has yet been sent for this audit reference.

-As above, but shows that the last email sent for this audit reference failed.

- Enables a published audit to be copied into an unpublished audit.

- Enables the user to download an excel spreadsheet of the audit

- Enables the user to produce a PDF download of the audit

- Enables the auditor to produce a PDF download of the corrective actions report (CAR)

- Enables the auditor to archive the document. Note. An archived audit can be recovered by changing the Status filter to Archived and clicking the same icon again.

There is also an excel spreadsheet download available for all the audits in the selected range.

The reference number shown is either the system allocated reference number or the business allocated audit reference number as specified in the Themes Settings.

On clicking the audit 'Audit Name' hyperlink, a 'Read Only' audit screen will be displayed showing the audit details entered.

By clicking the audit 'Date' hyperlink, an auditor may be allowed to change the date of an unpublished audit, or a published audit if the Audit Themes 'Audit Date Type Shown' selects 'Completion Date' and changeable.

The location of an audit can also be changed if the user is authorised by clicking on the 'Location' hyperlink.

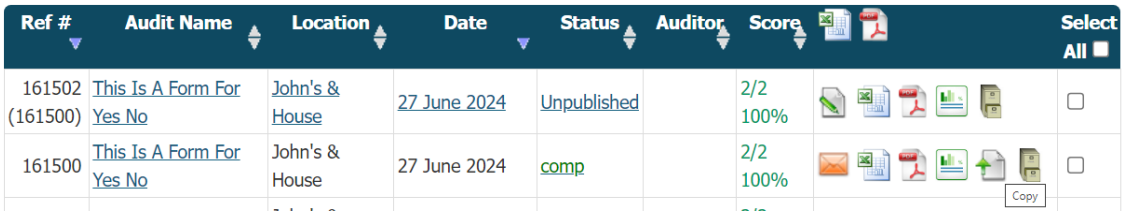
The Auditor, RAG coded score and percentage compliance is shown as well as the audit compliance status.

6.1.1 Copy Published Audit Functionality

We sometimes have a situation where the audit has been published and an error in the audit has been observed.
The system does not allow the ability to 'un-publish' an audit as this could cause issues with the integrity of the audit.
The solution agreed is that we will allow a completed audit to be copied. The copied audit would become unpublished, and would refer to the original audit. The original audit can then be archived.

So, in the diagram below:

1. The 'Copy' icon, only available for system administrators with the Archive Permission set.
2. The copied audit refers back to the originating audit.
3. The copied audit has a status of Unpublished.

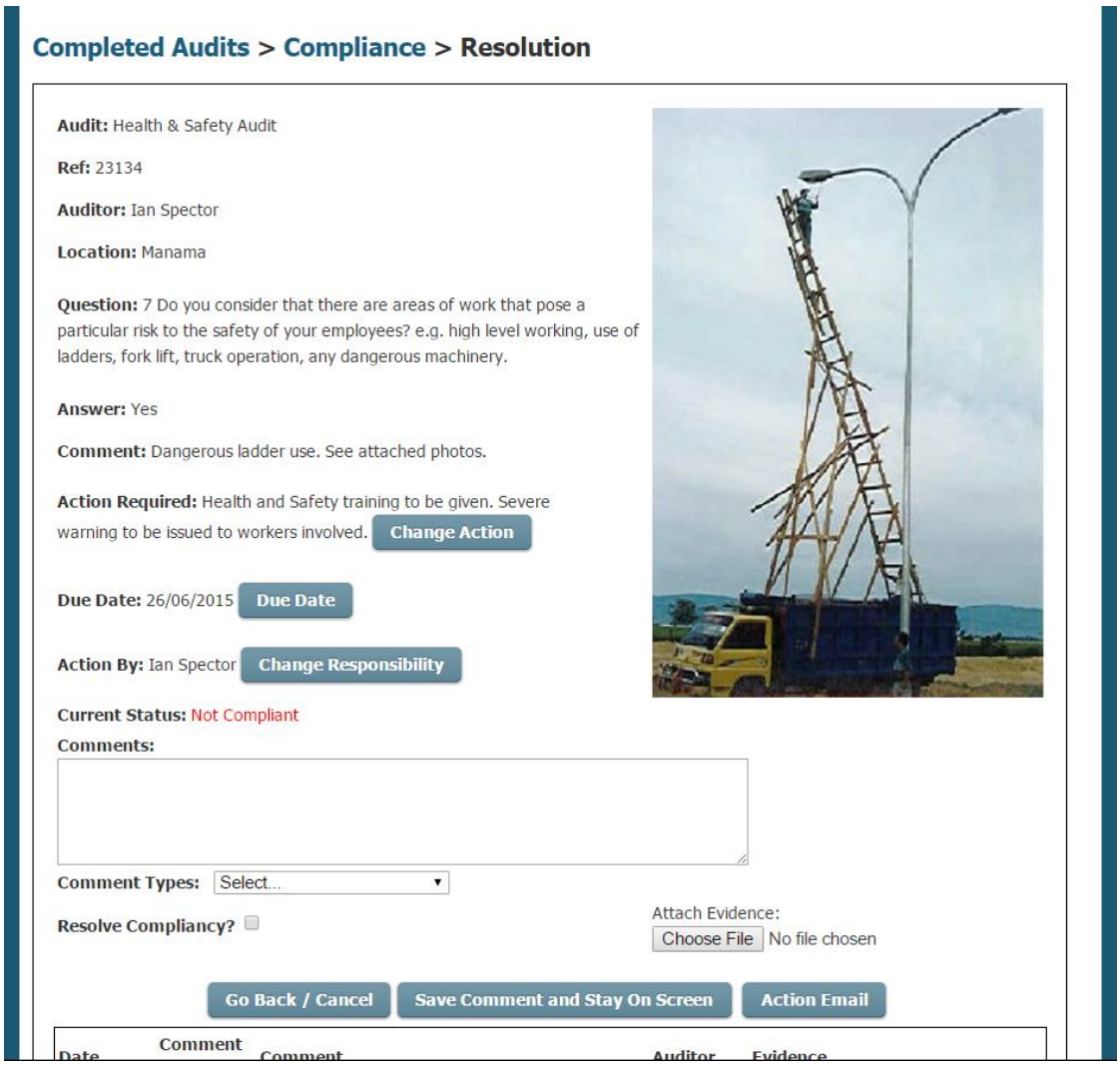


Ref #	Audit Name	Location	Date	Status	Auditor	Score		Select All
161502 (161500)	This Is A Form For Yes No	John's & House	27 June 2024	Unpublished		2/2 100%		
161500	This Is A Form For Yes No	John's & House	27 June 2024	comp		2/2 100%	Copy	

6.1.2 Non-Compliance Resolution

On clicking the audit 'Compliance' hyperlink in the 'Status' column, the auditor is taken to a summary of the audit questions showing the compliance status of each question. On clicking 'Compliant' or 'Major Not Compliant' question in the Question Status dropdown, a list of qualifying answers are shown. Users with 'Compliance' permissions can complete the actions taken to resolve the non-compliance. If the audit has not been published it instead takes the auditor to the sign off screen.

On selection of a particular not compliant question full details about the question and answer are shown and resolution details can be entered.



If authorised, the user can change the action required, the due date and the responsibility for resolution.

Details about what has been done can be entered. If comment types are set up, these comments can be allocated a comment type.

Files can be attached as evidence of the compliancy being resolved, and the comment field is completed explaining what actions have been taken.

If the user has resolved the issue, and the comment and evidence support this, then the 'Resolve Compliancy' box can be checked, and the 'Save Comment and Stay on Screen' tab is selected. The details are then added in the comment audit trail box at the bottom of the screen. The evidence will also appear there.

If the Action Email is enabled for the logged in user, and selected, an email screen is shown that allows the details of the issue to be issued. This functionality can be used for example, when a work order is required to be raised.

If authorized, it is possible to change the person responsible for the action before authorisation, the due date and the action by person responsible.

Once 'Resolve Compliancy' is checked, if 'dual authorisation' is enabled, the auditor is alerted on their dashboard, who can then go in and resolve the non-compliancy by clicking 'Authorise Resolution' on the audit, and checking the box on the resolution screen once the auditor is happy that the issue reported has been resolved. The status of that question becomes compliant, although the score does not change. In order to prove that they have indeed resolved whatever caused them to be 'Not Compliant', users have to upload proof that they have done so, which can be done by clicking the "Browse" tab beneath "Attach Evidence".

However, the audit can choose to reject the resolution which will require the resolution to be re-addressed. Also, the auditor can choose to reject the resolution and close, which will leave the audit in an authorised non-compliant state.

If the hyperlink has an asterisk beside it, it shows that a non-compliance that has been addressed needs to be authorised. Users with access to that audit at that location with 'Authorise' permission set can go in and authorise (or reject) the compliance changes made.

Note. Although on resolution, that audit question becomes compliant, and when all audit questions become compliant, the audit becomes compliant, the audit score NEVER changes for a published audit.

6.1.3 Resolving Audits – Multi-Answer Option

There is also an Auditing Setting 'Resolve Multiple Non-Compliances' that will allow multiple answers to be addressed at the same time.

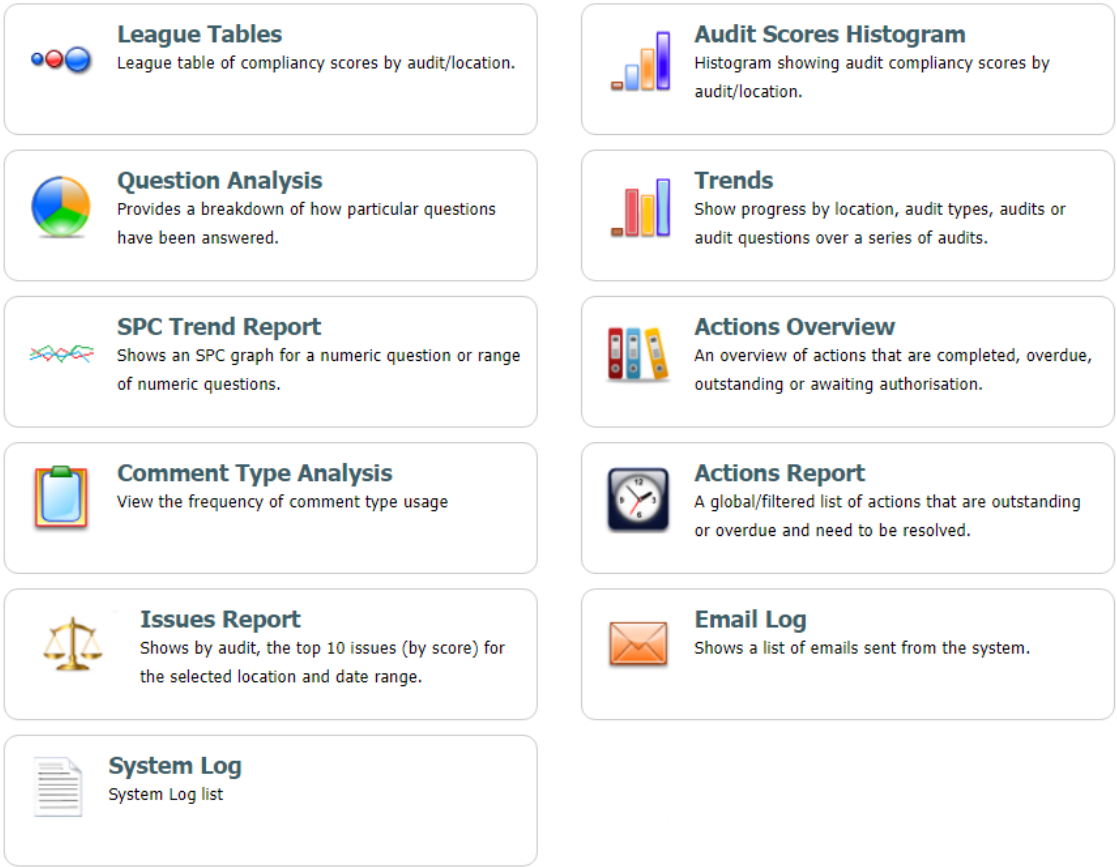
On selection, the user will be enabled to resolve multiple non-compliances in one go where the resolution is common against each answer.

This will bring up a compound screen that allows all of the questions to be answered together.

Note. Where dual authorisation is required, the authoriser still needs to go in and authorise each response in turn.

7 Management Information Screen

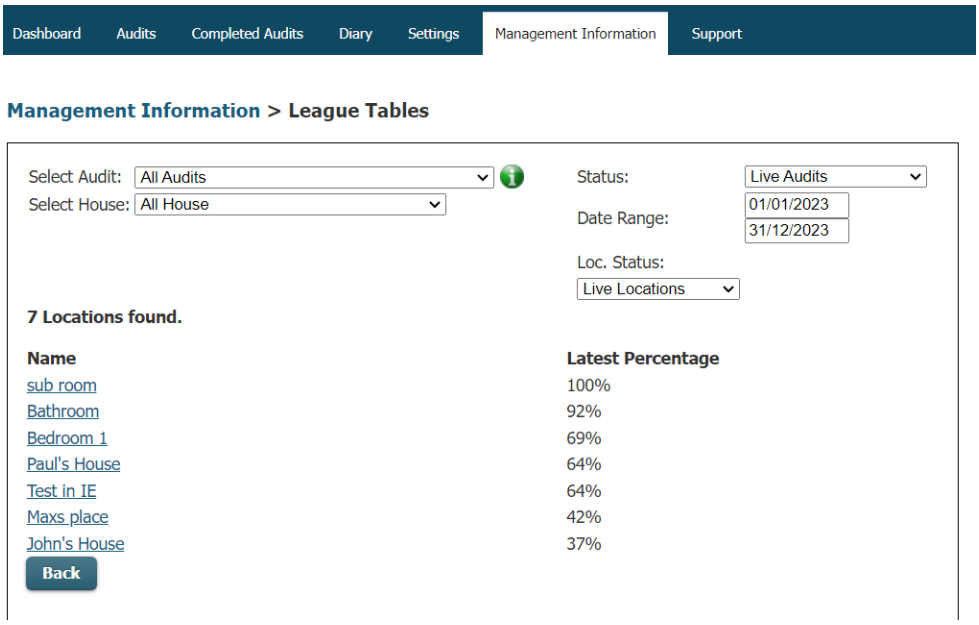
These screens allow managers to monitor performance and identify where issues lie. These screens will be added to over time and some businesses choose to add their own bespoke management reports to the standard suite.



Access to these screens is determined by the user permissions allocated.

7.1 League Tables

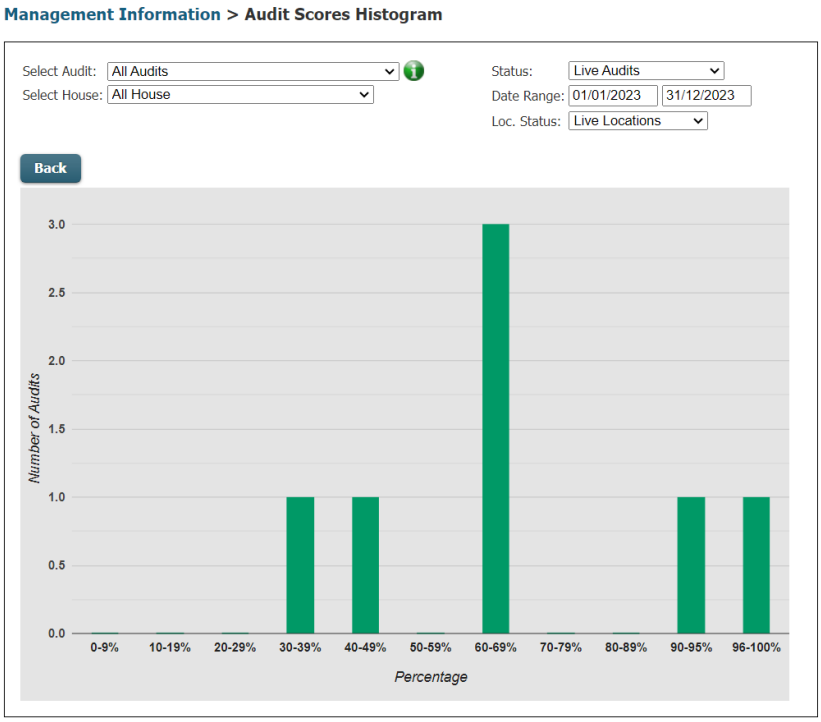
The **League Tables** compare performance between locations based on the latest compliancy score in the date range.



By clicking on the hyperlinks, the user is shown all audits in range for that location. This will show the trends for that location for the selected audit in the selected date range and status for the selected locations. The percentages are colour coded according to the RAG colour code settings.

7.2 Audit Scores Histogram

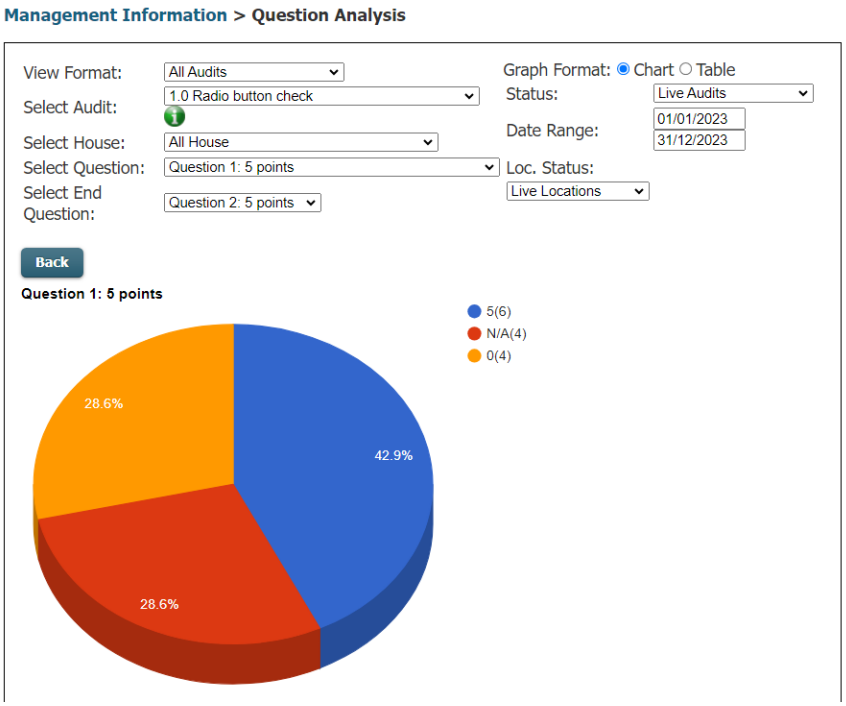
The screen contains a histogram showing the latest audit scoring performance for locations in percentage groupings for the date range.



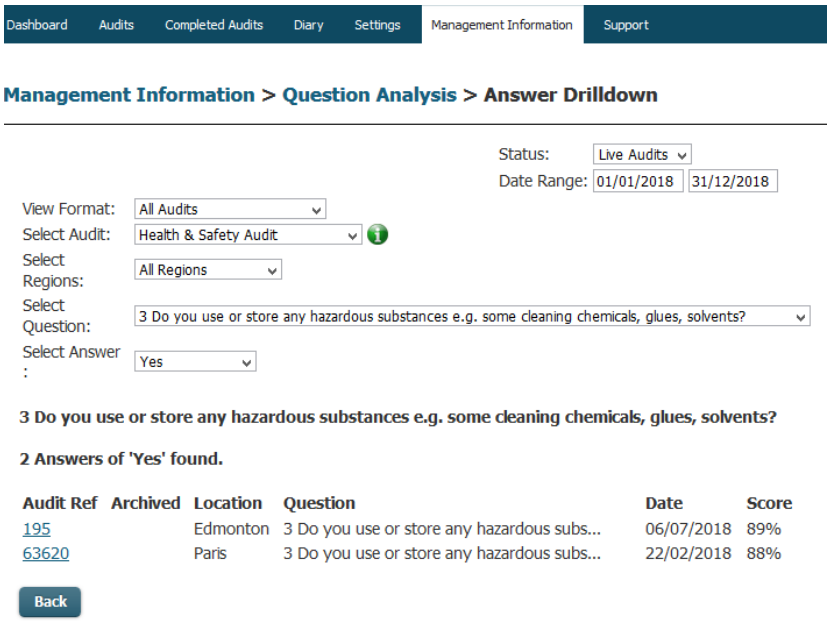
After clicking on a bar, the user is shown a list of locations with their latest audit score fitting into that range. Then by clicking on the location, the user can see a list of Audits just from that location. The user can then drill down to view that audit further.

7.3 Question Analysis

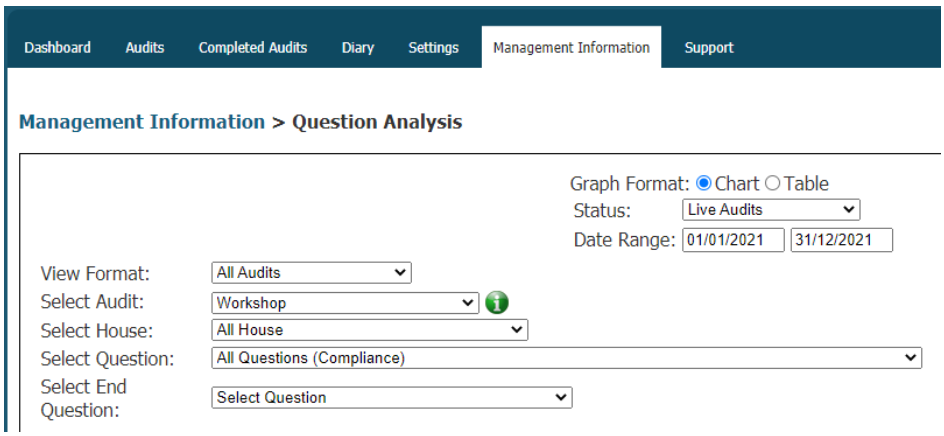
The **Analysis by Question** screen allows the manager to see the performance for a particular audit question from the latest audit across selected locations, or all audits completed for the selected locations. The use can filter the results retrieved by also selecting the date range and status, which can be live audits or archived audits.



When clicking on a segment, a breakdown of the results which make up the values of the segment is shown.

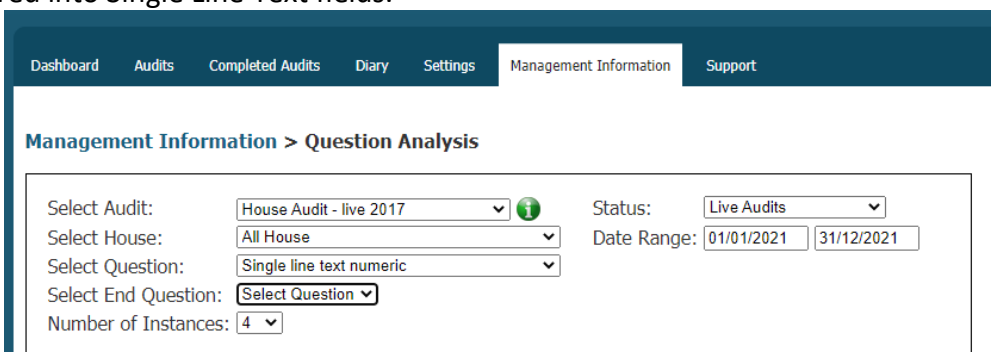


A question range can be used on this screen to manage performance for a set of specific questions.



7.4 Standard Process Control

The Standard Process Control Graph can be used to display the trend of numeric inputs entered into Single Line Text fields.

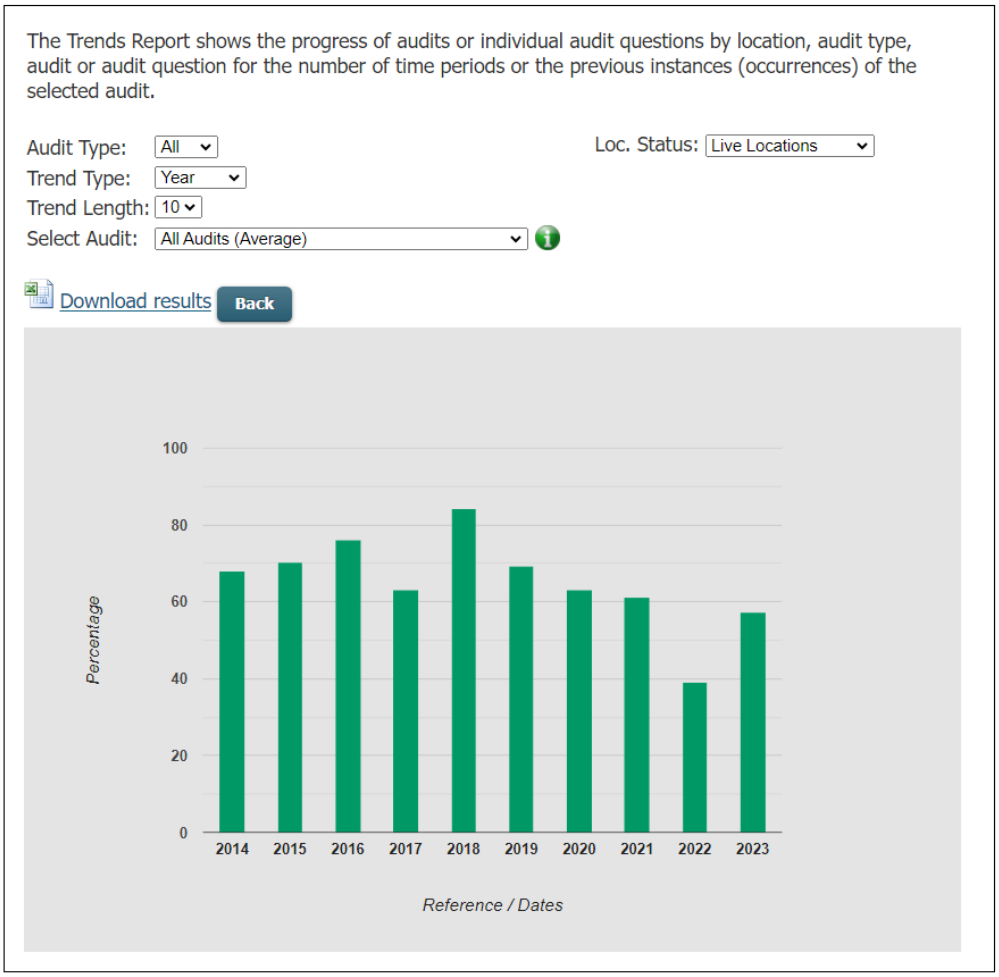


Simply select the Audit, Location and Question range and the answer trend will be shown. The "Number of Instances" input indicates how many results will be displayed.

7.5 Trends

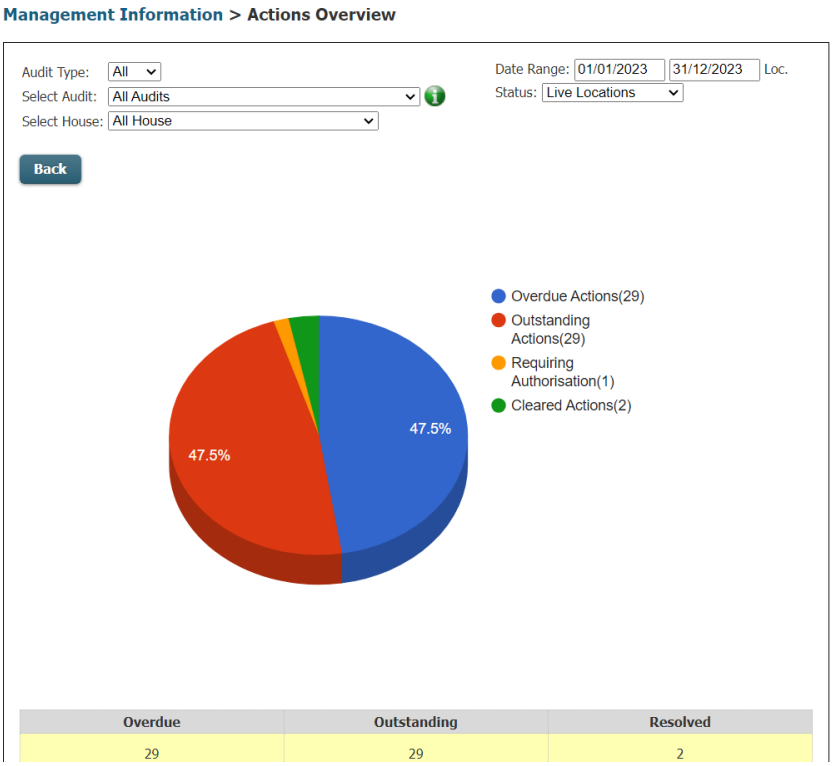
This report shows trends of score percentage over time to enable management to review changes in performance over time. It does this by showing progress by location, audit types, audits or audit questions over a series of audits.

Management Information > Trends



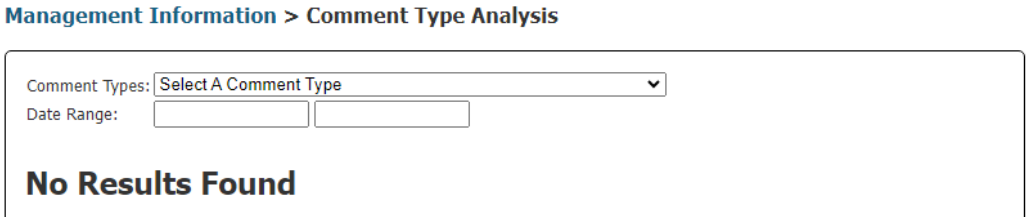
7.6 Actions Overview

This report gives a snapshot for a time period of the actions for an audit showing actions that have been cleared, are overdue, outstanding and awaiting authorisation.

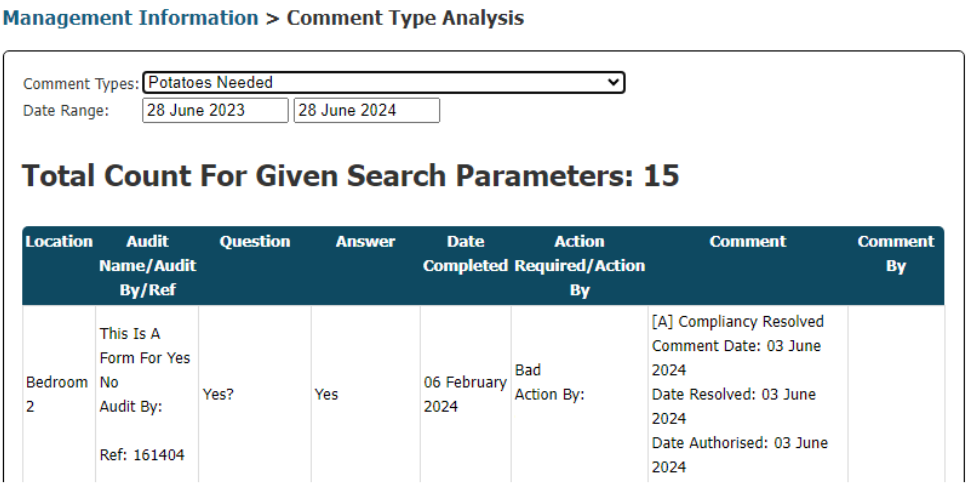


7.7 Comment Type Analysis

Comment type analysis allows a user with the correct permissions to view comments made against actions raised against completed audit, filtered by comment type. This allows for analysis of what type of comment types have been used, by who, where, when, how often, and within a given date range.



Note. This page is paginated and will display the number of results allowed per page set in the themes settings. This is 50 by default. Page selection can be found at the bottom left of this page.

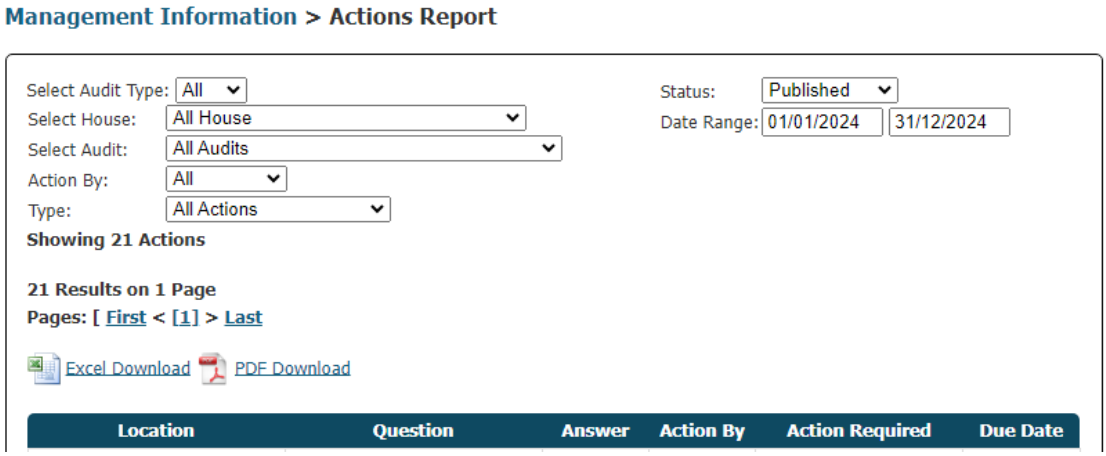


7.8 Actions Report

The **Actions Report** option allows the manager to review:

- Outstanding actions that have not been addressed
- Overdue actions which are outstanding actions that have not been addressed by the specified due date.
- All Actions
- Cleared Actions
- Requiring Authorisation, filter those actions that have been resolved but require authorisation

These actions can be reviewed by location, person and/or action.



An excel download version of this information is available that allows further analysis to be carried out.

A PDF download button has also been added which can redirect to a PDF file and show the filtered information, similar to the excel download.

7.9 Issues Report

This report shows the top 10 issues for a particular audit over locations. It is a quick way of spotting key issues.

Issue Number	Question	Score	Possible Score	Total Lost	Non Compliant	Non-Compliant Outstanding	Non-Compliant Overdue
1	Multiple Choice (compliance set to zero)	22	48	26	0	0	0

The user can drill down into the question concerned for further analytics.

7.10 Email Log

The **Email Log** option allows the manager to review the following types of emails produced by the system:

- **Auditor Emails** by date and audit
- **Reminder Emails** by user and date
- **Upcoming audits** by audit, planned date and location.
- **Action Email** by audit question.

With the ability to search for a particular information.

Management Information > Email Log

Auditor Email | Search

This log shows the last 300 emails sent from the system.
Click on a heading to sort the column then hold down shift and click on another heading to sort multiple columns.

Date	Ref#	Audit	Email	Grouped Audits	Result
26 September 2023 10:21	158922	1.0 Radio button check	david.watson@formability.co.uk	158921	Sent OK
04 September 2023 21:19	158846	All Question Types (live)	david.watson@formability.co.uk	158846	Sent OK
04 September 2023 21:19	158859	All Question Types (live)	david.watson@formability.co.uk	158846	Sent OK
01 September 2023 13:56	158824	All Question Types (live)	david.watson@formability.co.uk	158824	Sent OK
01 September 2023 13:56	158825	All Question Types (live)	david.watson@formability.co.uk	158824	Sent OK
22 August 2023 15:12	158665	All Question Types (live)	david.watson@formability.co.uk		Sent OK

7.11 System Log

This report enables the system administrator to track down by auditor or by issue what happened at a particular time.

Settings > System Log

Auditor: All
Type: All
Search Notes: | Search | Date Range: 01/11/2022 31/10/2023

	Username	Action	Notes
04/10/2023 11:21:21	demo	Login	Logged In: demo
04/10/2023 09:08:43	demo	Logout	Logged Out: demo
04/10/2023 09:08:08	demo	Login	Logged In: demo
04/10/2023 09:05:52	demo	Logout	Logged Out: demo
04/10/2023 08:49:13	demo	Login	Logged In: demo
04/10/2023 04:02:47	demo	Logout	Logged Out: demo
04/10/2023 04:02:24	demo	Login	Logged In: demo
04/10/2023 03:25:49	demo	Delete Audit	Audit ID: 2043
04/10/2023 03:24:43	demo	Run Autofill	Running autofill for responseid: 63645
04/10/2023 03:24:43	demo	Fill-In Audit	Audit ID: 2017, Completion ID: 63645

8 Diary Screen

The diary screen shows an overview of all planned and completed audits for the current year. You can easily see how many audits were planned for a specific month, how many audits were completed in that same month and how many planned audits in that month are overdue.

Diary

Year: 2018

Add Planned Audit

Audit: All Audits ◉ Auditor ○ Location ○ Audit

	Jan			Feb			Mar			Apr			May			June			July			Aug			Sept			Oct			Nov			Dec			Totals		
Auditor	C	P	O	C	P	O	C	P	O	C	P	O	C	P	O	C	P	O	C	P	O	C	P	O	C	P	O	C	P	O	C	P	O	C	P	O	C	P	O
Bradley Adams	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**	**0**	**0**
Aftab Ahmed	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**	**0**	**0**
Gordon Banks	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**	**0**	**0**
Paul Beck	0	0	0	7	1	0	3	1	0	0	1	0	0	2	0	0	1	0	0	1	0	0	1	0	0	1	0	0	1	0	0	1	0	0	1	0	**10**	**12**	**0**
Food audits example	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**	**0**	**0**
Mark Masters	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**	**0**	**0**
Ian Spector	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**	**0**	**0**
Geoffrey Worsfold	0	0	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	**2**	**0**	**0**
Totals	**0**	**0**	**0**	**9**	**1**	**0**	**3**	**1**	**0**	**0**	**1**	**0**	**0**	**2**	**0**	**0**	**1**	**0**	**0**	**1**	**0**	**0**	**1**	**0**	**0**	**1**	**0**	**0**	**1**	**0**	**0**	**1**	**0**	**0**	**1**	**0**	**12**	**12**	**0**

C	Completed Audits
P	Planned Audits
O	Overdue Audits

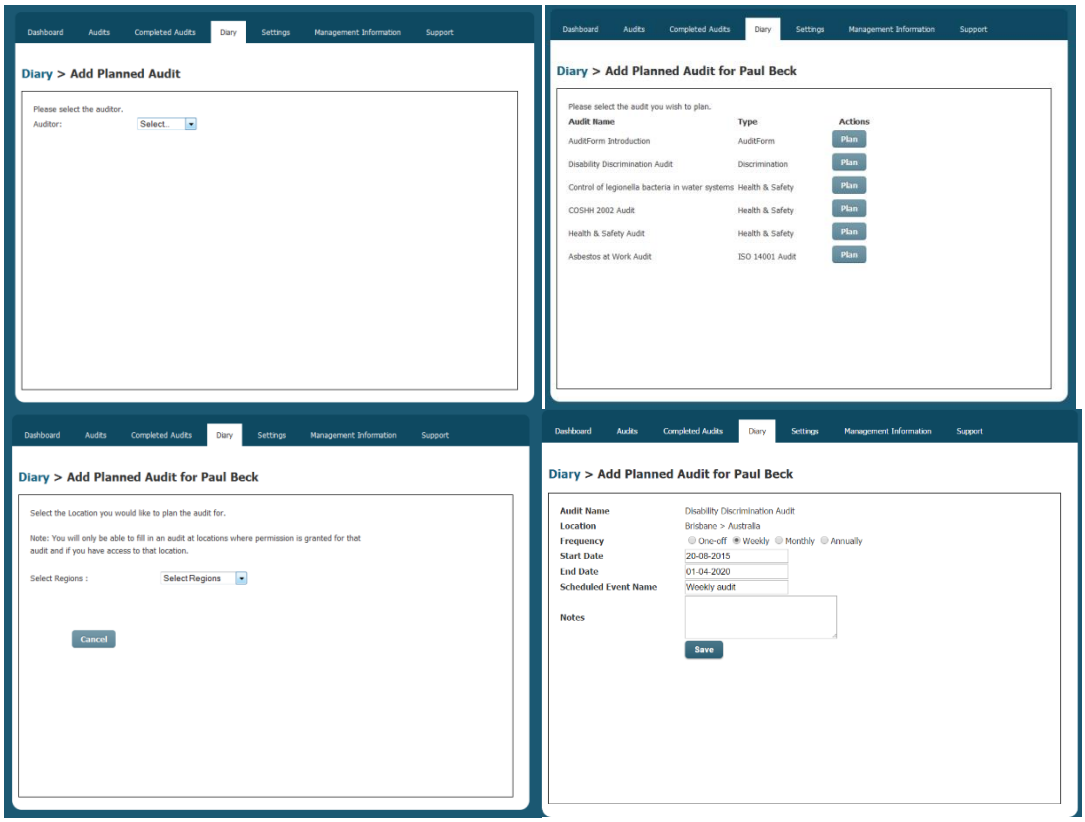
Further information on the completed, planned and overdue audits of any specific month can be viewed by clicking on the number. This will tell the user what the audit was, where the audit was done, and when it was done on.

Diary >Completed Audits for Paul Beck

7 Completed Audits for Paul Beck (Feb 2018)

Ref #	Audit Name	Auditor	Location	Completed Date
63628	AuditForm Introduction	Paul Beck	Heaton Park > Manchester > England	23/02/2018
63630	AuditForm Introduction	Paul Beck	Australia	23/02/2018
63639	Electronic Product Test	Paul Beck	England	23/02/2018
63619	Walkabout Audit	Paul Beck	Blackburn > England	22/02/2018
63620	Health & Safety Audit	Paul Beck	Paris > Francais	22/02/2018
63621	Hygiene Inspection Checklist	Paul Beck	England	22/02/2018
63542	AuditForm Introduction	Paul Beck	England	19/02/2018

An audit can be planned by clicking the “Add Planned Audit” tab.



The user can check the data for a specific Audit through changing the details in the drop-down boxes above the actual diary.

Audits are identified as overdue depending upon the Audit Margin Settings. e.g.

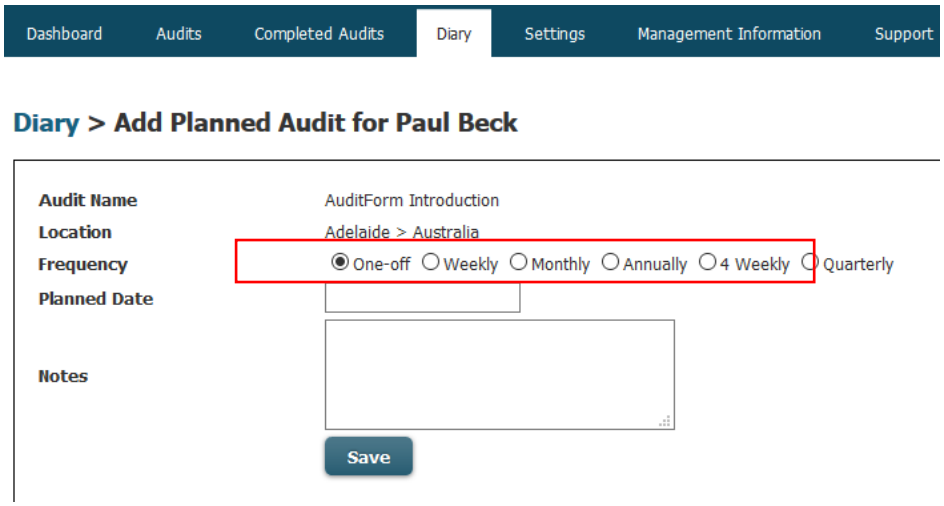
Diary >Completed Audits for Paul Beck

1 Completed Audits for Paul Beck (Oct 2016)

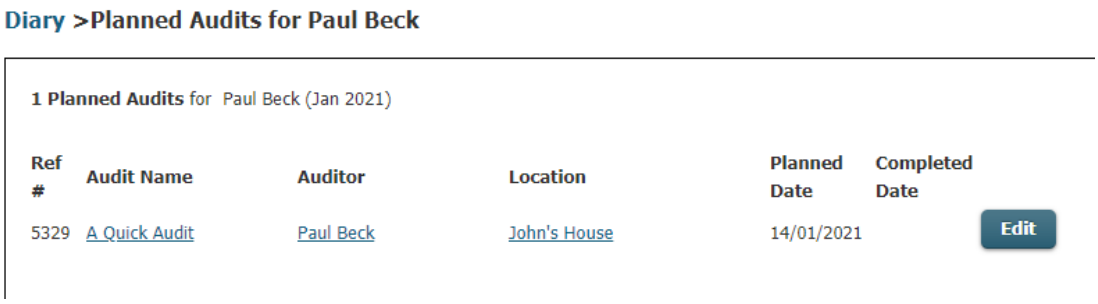
Ref # Audit Name	Auditor	Location	Completed Date
63273 AuditForm Introduction	Paul Beck	Adelaide > Australia	07/10/2016

Here, the audit is overdue if it was now completed 1 day either way of the planned date.

Audits can be scheduled as a one-off audit, weekly, monthly or annually.

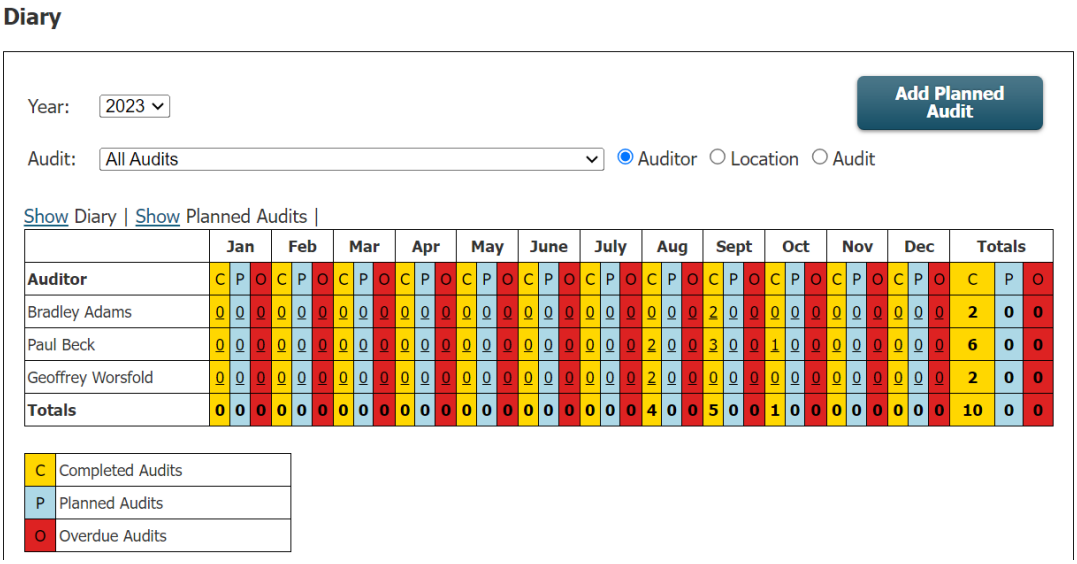


When clicking on a planned Audit on this screen, you can also select the link to its Auditor, Location and Audit to change them if required.



This allows planned audits to be corrected in case of fault.

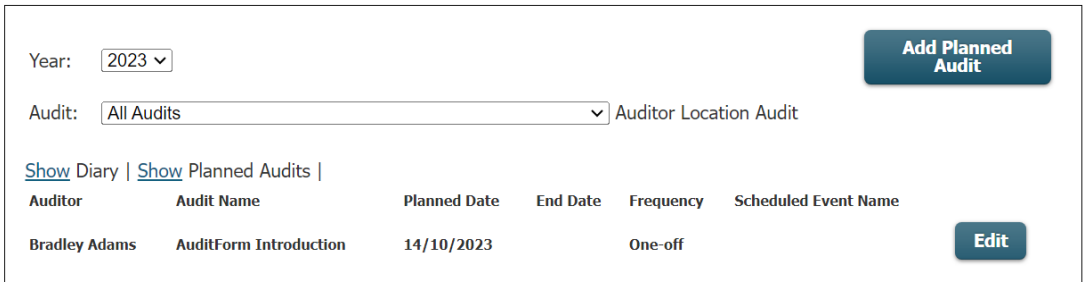
Planned audits can also be amended using the Show Planned Audits tab.



On selection, of 'Show Planned Audits', you will see the planned audits that have been set up in a table.

Here you will be able to edit a selected schedule:

Diary



This will show every event in that schedule:

The 'Hide future planned audits for this event' box will allow you to hide all future planned audits for the event or to amend a particular scheduled audit.

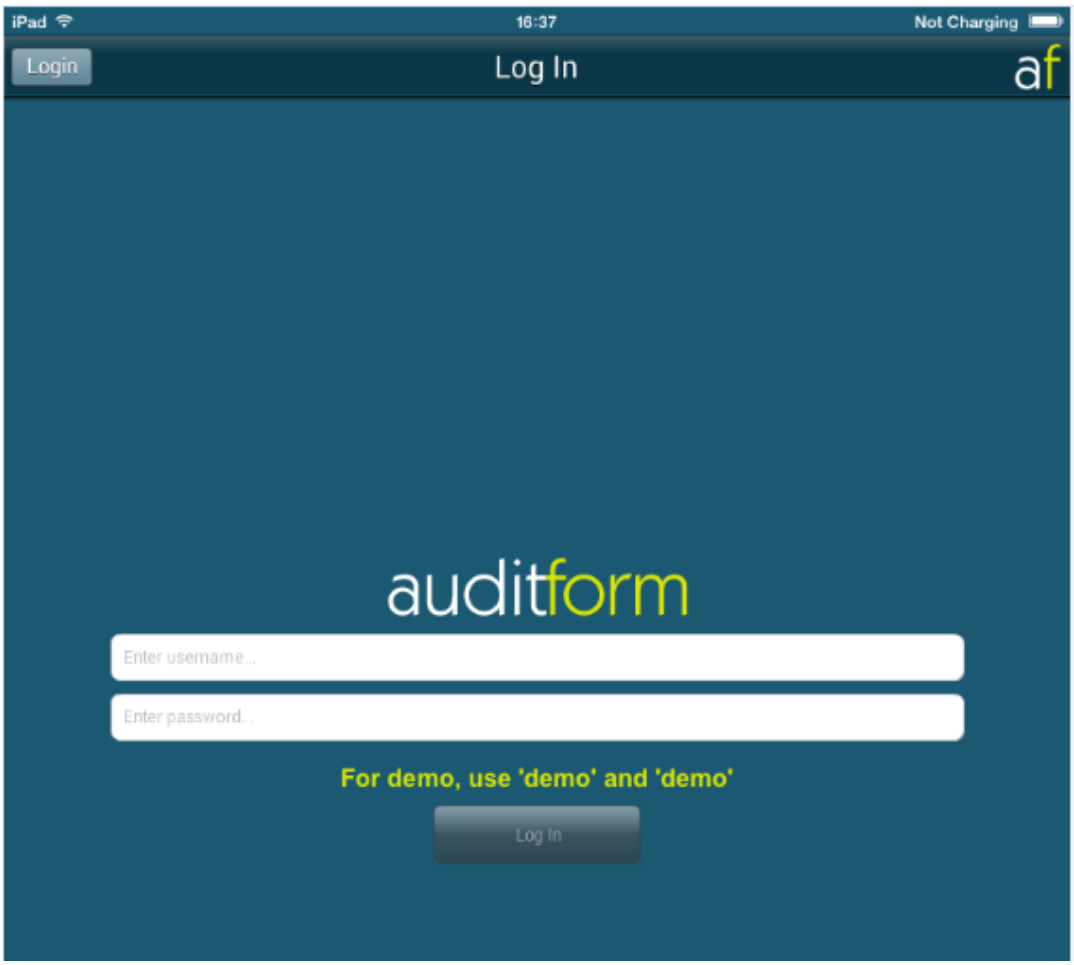
The top edit bar will take you to a screen that will allow you to re-specify the start and end date, the scheduled event name, notes and frequency. Effectively replacing the schedule.

Scheduled audit notifications

A system question hook called 'diary' is available.
When a date or datetime question is answered with this hook in place, then it will add an entry to the diary for that audit, auditor, location and date for that audit to be completed on that date.
For example, the question might be 'Date of next audit', and the next audit will be automatically scheduled for that date.

9 Audit Completion on a Smartphone or Tablet

To use AuditForm on your Apple or Android device, you must first of all install the app from the platform's App Store (App Store, Google Play Store respectively).
Once installed, the below login screen will be shown:



Note: Logging in requires an internet connection.

If you have not been given access to your own custom area then you can login to our demo account by using 'demo' as your username and password.

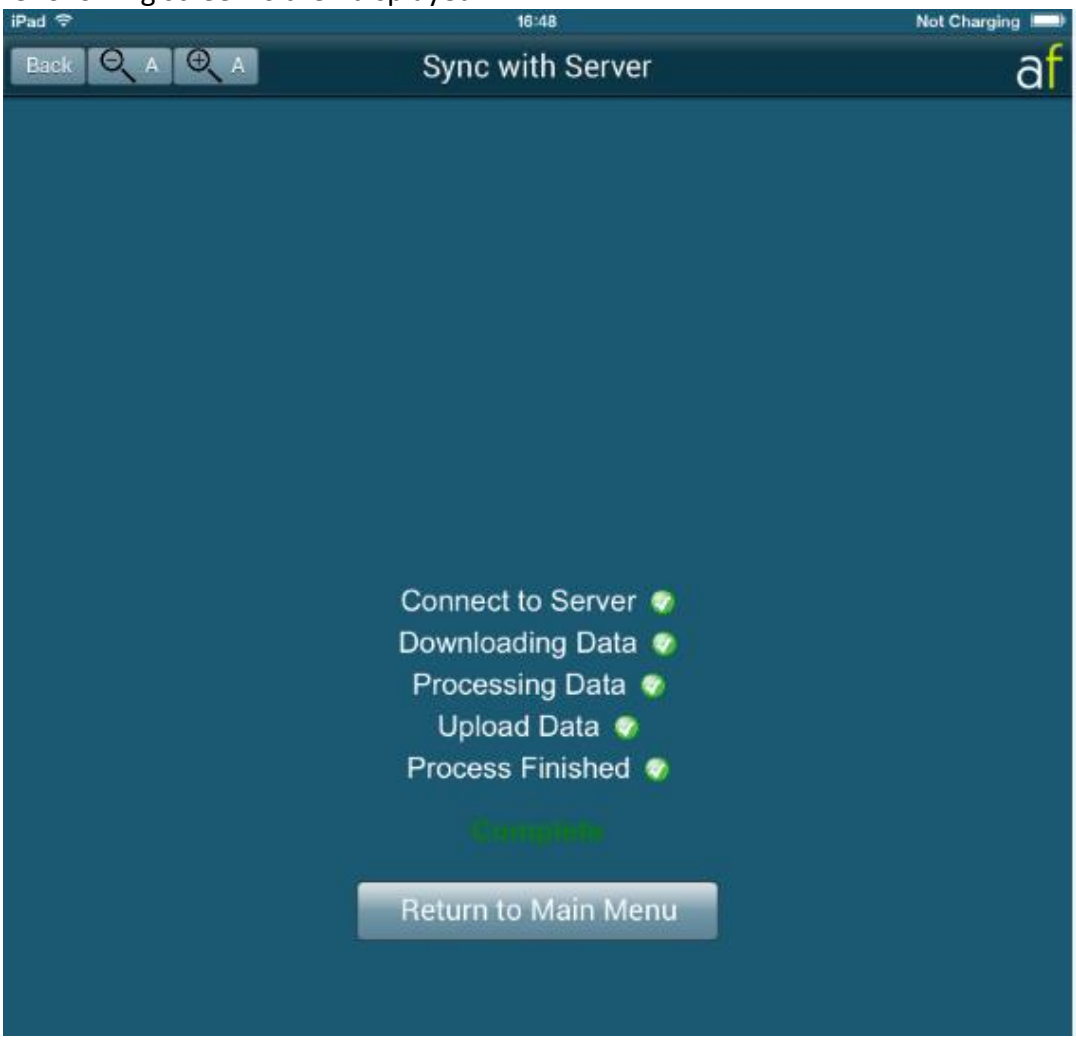
After logging in, the system will automatically take you to the sync screen so that you can download the audits to your device.

Note: Syncing requires an internet connection.

The AuditForm app has been designed so that it can be used without an internet connection. Audits and audits in progress that have been published or marked for

upload will be uploaded to the server after the 'Sync With Server' and Sync tab is pressed. Syncing also brings the latest versions of the audits to the tablet/phone.

The following screen is then displayed:

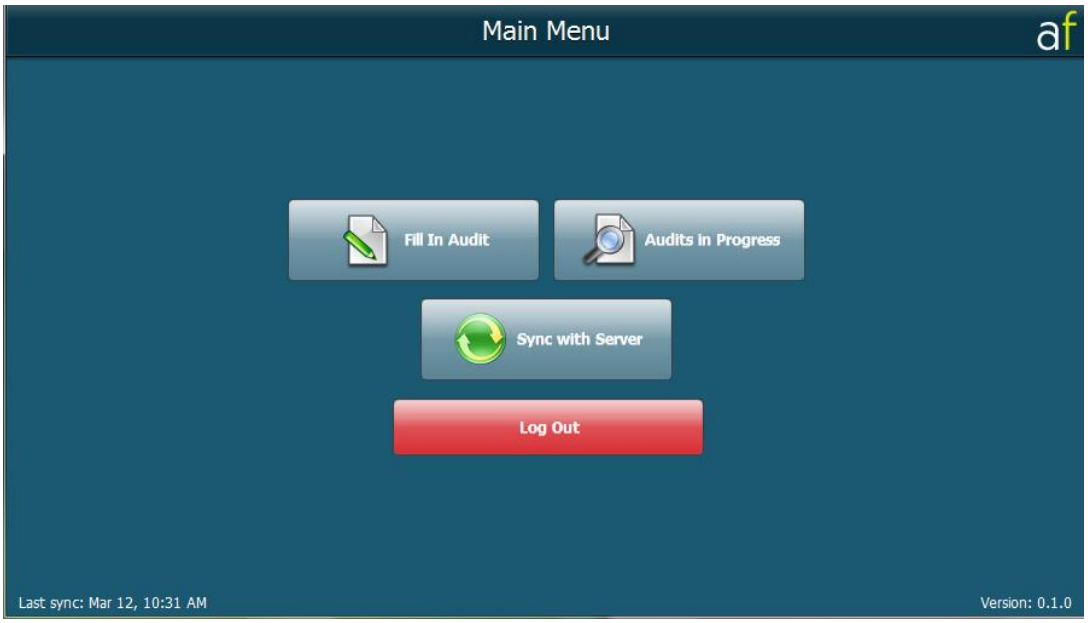


Pressing 'Start Sync' will download all the latest audit information for that user as well update any audits that have been marked for upload or published.

Each step is flagged as the process progresses.

At this stage, or at the audit fill-in stage you can increase or reduce the size of the text on the screen to suit your preferences.

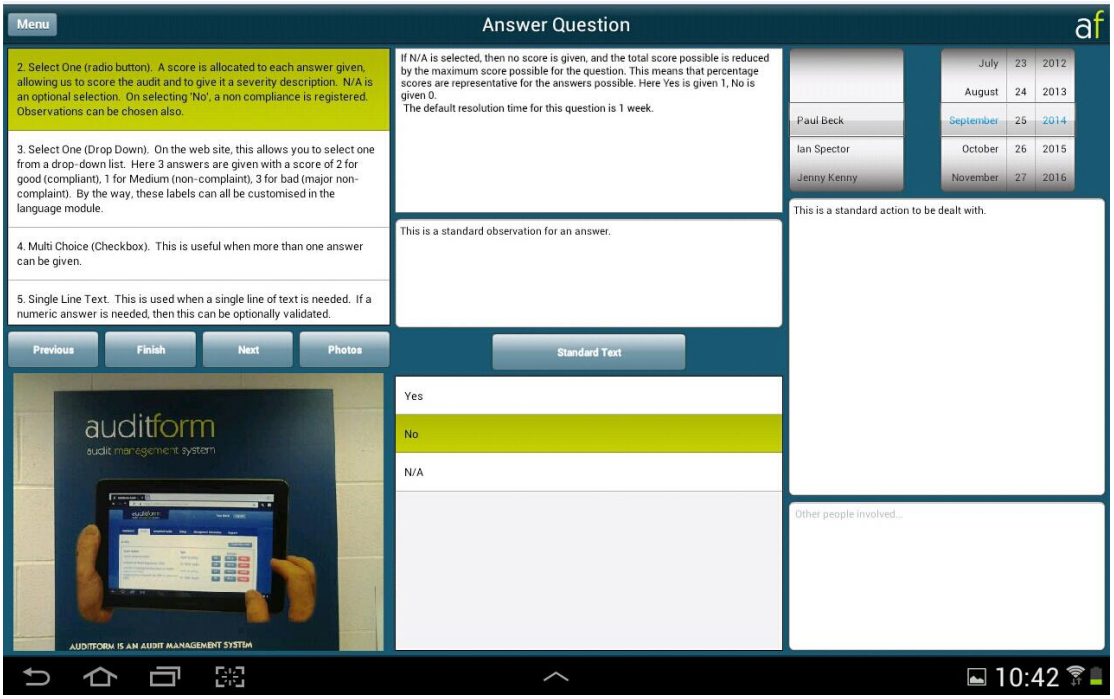
Click the 'Back' tab to go to the Main Menu screen.

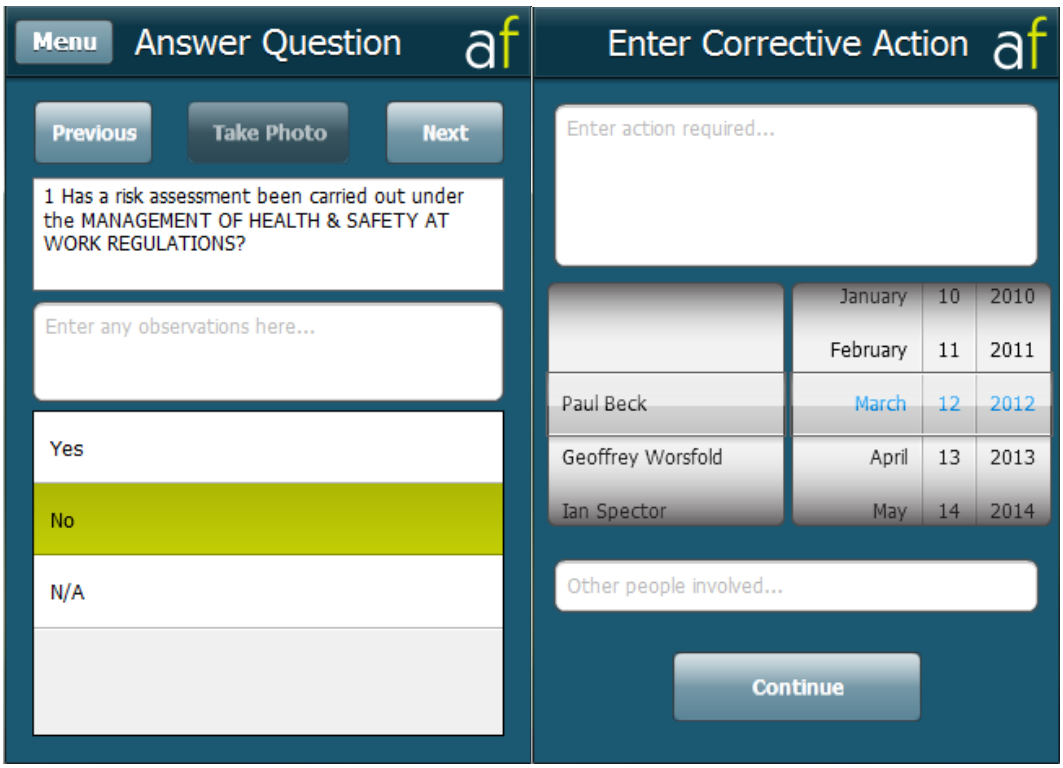


The user completes audits by clicking on the 'Fill In Audit' tab. If the user has audits in progress, then these can be progressed using the 'Audits in Progress' option. You will then need to select the Audit that you wish to fill in. After this the 'Select Location' screen will be shown:

If the location selected has any sub-locations the 'Next Level' tab will be enabled. Clicking this tab will show a list of those sub-locations. Once the preferred location has been found, the 'Audit Location Name' tab should be pressed. The user will then be taken to the first question of the audit.

The application then shows a screen that is appropriate to the device you are using (Phone or Tablet). These are shown below:





In the tablet layout there is a list of the questions from the audit, this allows for the user to quickly switch between questions, see what questions are coming up etc. Alternatively the Navigation Tabs can be used to view the **Next**/**Previous** Question or **Finish** the Audit.

There is also a tab on the screen (in both views) that allows for photos to be taken (if the device has a camera) or uploaded (even if the device doesn't).

Pressing the tab will take the user to a blank screen, with 3 unavailable options in the middle and two in the top right. These two options are “Gallery” and “Take Photo”.

Pressing gallery will open a list of images that are already on the device, and the user can select the one they want to use. Selecting “Take Photo” opens a camera so the user can take a new picture (provided the device has a camera).

Once a photo has been taken or uploaded it will either be shown on screen (tablet) or viewable by the View Photo tab (phone). The user has the ability to take multiple photos for a question from version 1.4.1 of the App release, and can be cycled between with the “Next” and “Previous” tabs.

Photos that the user wants removed can be through pressing the “Clear” tab. There is no prompt that asks you “If you’re sure” after pressing the clear tab, the photo is just removed from the upload.

If any non-compliance is identified, then the program will ask for the user to complete the corrective action details. On the tablet this will be shown as a third column on the existing screen.

Clicking the Menu tab in the top left (or using the android’s menu tab) will take the user to the following screen:

Pressing the Question Help Text tab means that if the question that was being viewed has any help text attached to it then this tab will be enabled and clicking it will take the user to a new screen with the help text displayed.

The Jump to Section tab lists all the sections in that audit, and clicking one will take you instantly to it, allowing for speedy navigation.

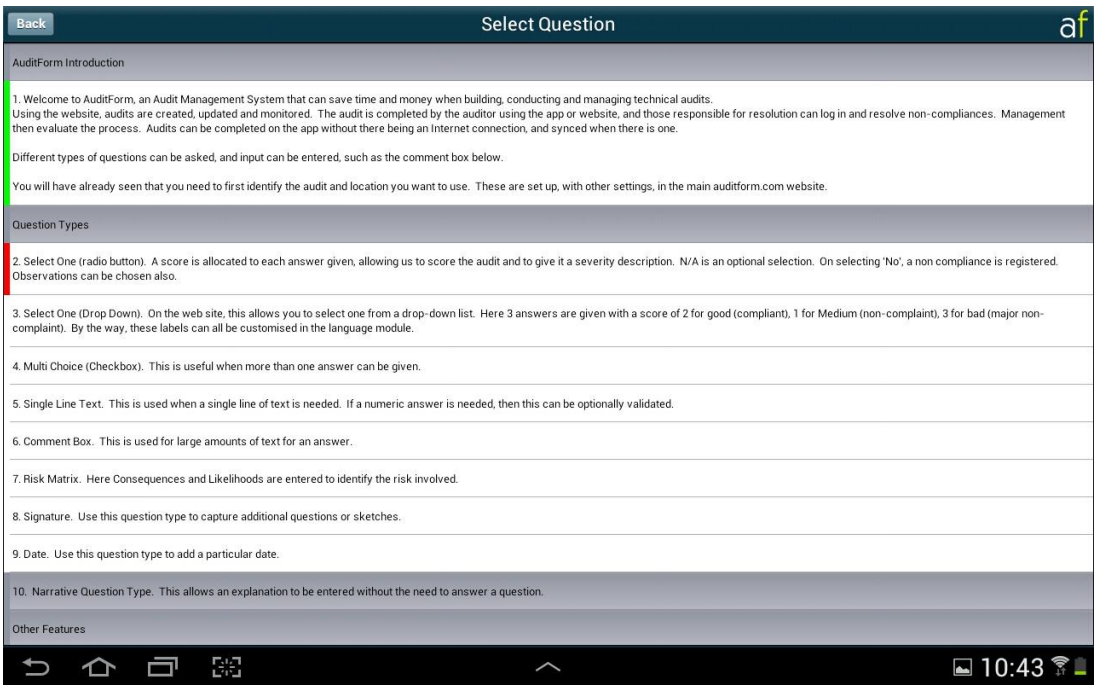
The Unanswered Questions tab shows a list of every question remaining in the audit that has not yet been answered. Clicking one transports the user to that question

The View Score tab shows the user the score that it is currently receiving and the amount of non-compliances so far.

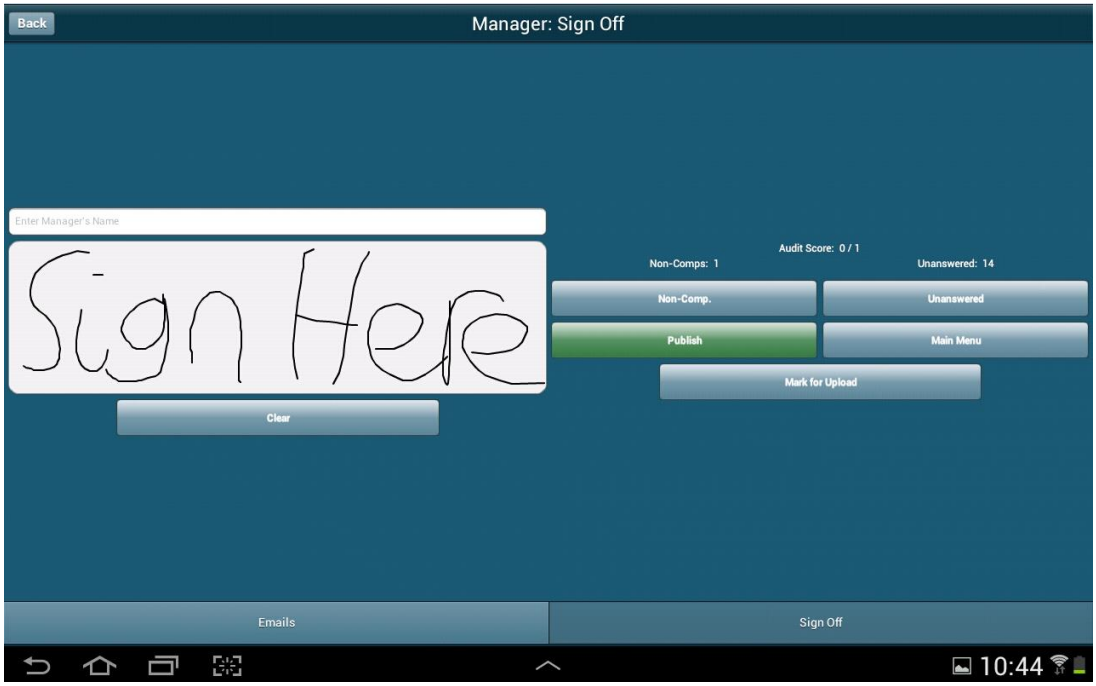
The Delete Audit will allow the user to delete the audit currently in progress. On confirmation, the audit will be deleted and the user taken back to the main menu.

The Finish Audit tab allows the user to finish the audit without going right to the end again, if they've gone back to change some things.

The Jump to Question tab will show a list of all questions within the audit, and clicking on one takes you that that question. This screen also includes a coloured status bar to indicate the compliancy of any questions that have been answered so far. An example of this is shown below:



Once the audit has been completed, the user will be taken to the manager review section. From these screens, people who are to emailed copies of the audit are identified, non-compliant questions can be reviewed and the audit is then signed off. If any questions were missed accidentally when going through it, an unanswered questions tab is available to allow the user to go back and answer them.



Note: Only audits that have been Published or Marked for Upload will get synced to the server and cleared off the device. The other audits will remain on the device.

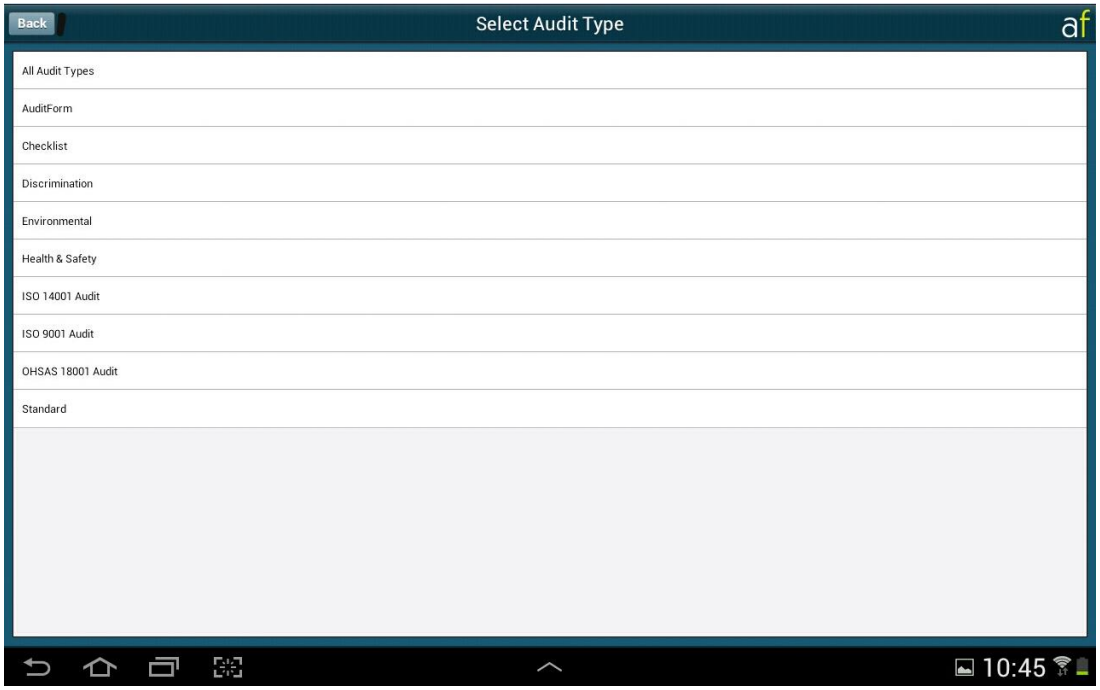
All program syncs are initiated manually by the user to prevent audits being uploaded prematurely. This is done using the **Sync with Server** tab found on the main menu. During this sync any changes made to the audit template will get downloaded to your device.

Program updates are handled through the platform's App Stores. The user will receive a notification that a new version is available, and they'll then need to tell their device to **update** the application at their earliest convenience.

On occasion, if the user makes to many clicks at once in a short space of time, AuditForm can effectively stop working. Though you can still type into the textboxes, the Next, Previous, Finish and Back tabs stop working, making it impossible to use. The only way to solve this is to close AuditForm fully, then start again. Your progress will have been saved so you can continue from where you left off.

Unlike the browser version of AuditForm, the user cannot archive audits, and nor can they view archived audits. Similarly, the tablet version cannot copy audits, edit existing audits or create a new audit. It is also not used for addressing and correcting any issues that crop up on an audit.

When choosing an audit, if the user cannot tell which they need by the names of the audits alone, by pressing the "Audit Types" tab in the top right, the user can see several different types of audit classifications and choose the criteria that most suits what they need the audit for.



The tablet version shows the audit questions in a different way to the browser version.

Where the browser can have multiple questions on a page and it's up to the discretion of whoever made the audit to put page gaps in to spread the audit out, the tablet version has all of the questions in one list in the top left, and the user goes through one question at a time, pressing the next tab merely moves the user down to the next question.

However, the Jump to Section tab in the menu identifies the parts separated by page breaks in the browser version as different sections here.

10 API Reporting

Information can be extracted from the database into a third party reporting package or excel for more advanced analysis.

The details of the API below can be seen on this link: https://api.auditform.com .

10.1 Authentication

When selecting your report, you will be asked for a login, and information will be made available according to your login capabilities.

The API uses digest authentication. You will be asked for a username and password before you can retrieve any data from the system. This is the same username and password you use to log into the Auditform website:

The base URL is: https://api.auditform.com .

You can list all audits you have access to by appending the following to the base URL: audits/getallaudits/

To list a specific audit you will need to know the reference number (??? in the example below). You can retrieve it with the following URL: audits/getaudit/refno/???/

10.2 Completed Audits

To retrieve a list of **all** completed audits you have access to you can use the below URL (This can take quite a while if you don't specify a date range and is limited to 500 audits).audits/getcompletedaudit/

You can filter the list to only show completed audits by adding the following to the URL: published/1/

To retrieve completed audits you have access to, you will need to know the audit reference number. The below URL will show you an audit from the demo account. audits/getcompletedaudit/refno/32479/

You can also see the answers against this audit by adding the following to the URL: includeanswers/1/

You can also see the compliances against the answers by adding the following to the URL: includecompliance/1/

To show archived audits in the results you can add the following to the URL: showarchived/1/

10.3 Date Ranges

To specify a date range you can add the following onto the end of the URL:
audits/getcompletedaudit/fromdate/2016-02-09/todate/2016-03-09

10.4 Text Searching

You can filter results by audit name. If you only know part of the name then it will search on the partial name (replace ??? with the search criteria):auditnametxt/???/

You can filter results by location name. If you only know part of the name then it will search on the partial name (replace??? with the search criteria). :locationnametxt/???/

You can filter results by user. If you only know part of the name then it will search on the partial name (replace ??? with the search criteria). :usersearchtxt/???/

10.5 Output Format

You can switch the output format from XML to either json, csv, html, serialized or php (php gives you a formatted array) (replace ??? with the format required):
format/???/

When selecting your report, you will be asked for a login, and information will be made available according to your login capabilities.

The API requires the analyst to build the URL link depending upon what is required. This is not an 'end-user' feature, but something that the more technical user will be able to make use of.

The API is very powerful and greatly enhances the ability to analyse information and report from the system.