



AssetPlanner™

Quick Start Guide
Audit Manager

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Navigation:

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Navigating to the Audit Manager

Upon logging in you will be taken to the home screen. Using the menu bar click on the “Audits” button to access to the Audit Manager.

The screenshot shows the Audit Manager interface with several callouts:

- Top Callout:** "The **Audits** button provides access to the Audit Manager and quick tools to create & view audits." (Points to the Audits menu item in the top navigation bar.)
- Left Callout:** "My Audits: this button will take you to the list of audits assigned to your user account." (Points to the My Audits button in the left sidebar.)
- Right Callout:** ">> To begin our next section click on **Find Audits**. This button will take you to the list of all audits and the main page of the Audit Manager." (Points to the Find Audits button in the left sidebar.)

The interface includes a top navigation bar with Home, My Dashboard, Favorites, Audits, Preferences, and Admin. The left sidebar contains Modules (Asset Planning), Asset Register (Map, List), and a list of asset categories: Emergency Services (33), Library (14), Municipal Services (10), Parks (8), and Training (38). The main content area features three charts: Cumulative Unfunded Liability, Average FCI after Funding, and a stacked bar chart showing audit status (Good, Fair, Poor, Critical) from 2017 to 2031. The bottom section displays a Facility Map with 89 items loaded, showing a map of the Salt Lake City area with colored pins indicating audit status.

View & Modify: Audit List, Audit Details & Data Grid

Audit List

The Audit Manager provides a listing of all audits and their current status. Within the list view there are tools to group, filter, sort, export and create, archive or delete audits.

The screenshot displays the Audit Manager interface. At the top, a navigation bar includes 'Home', 'My Dashboard', 'Favorites', 'Audits', and 'PM'. Below this is a 'Modules' section with icons for different asset types. The main area is titled 'Asset Planning / Audits' and contains a toolbar with buttons for 'New', 'Delete', 'Audit Wizard', 'Modify Selected', 'Filters', 'Audit BCA Report', 'Audit Needs Report', 'Archive', 'Unarchive', 'Export', and 'Search'. A table lists audits with columns for 'Audit ID', 'Asset', 'Summary', 'Status', 'Audit Type', 'Assigned To', and 'Assigned Group'. The table contains 39 rows of data. A blue callout box points to the top toolbar, stating: 'The Audit Manager menu buttons across the top allow for filtering, modification and creation of new audits.' A green callout box points to the 'List' button in the 'Asset Register' section, stating: '>>To begin our next section double click on any audit within the list.' A large blue callout box on the right side of the table provides detailed explanations for the status values: 'Scheduled: the audit has been assigned but not yet downloaded to AuditPlanner.', 'Downloaded to AuditPlanner: the audit has been downloaded to a mobile device using AuditPlanner™.', 'Uploaded from AuditPlanner: the audit has been submitted as a final upload from AuditPlanner™.', 'Waiting for QA/QC: the audit has been finalized by the auditor and is ready to be reviewed.', and 'Published: the last step in the review process. Publishing approves the data and submits it as part of the live data set.'

Audit ID	Asset	Summary	Status	Audit Type	Assigned To	Assigned Group
4	Dermott Arena	Arena Audits Phase 1	Uploaded from AuditPlanner	Comprehensive	Dom Lepri	Ameresco
5	Nichols Hills Ice Arena	Arena Audits Phase 2	Uploaded from AuditPlanner			
6	North Creek Arena #1 & 2	Arena Audits Phase 2	Downloaded to AuditPlanner			
7	North Creek Arena #3	Arena Audits Phase 2	Downloaded to AuditPlanner			
13	City Hall	Audits Phase 2	Waiting for QA/QC			
14	City Hall - Site	Audits Phase 2	Waiting for QA/QC			
15	Main Works Yard - Operations	Audits Phase 2	Downloaded to AuditPlanner			
16	Main Works Yard - Site	Audits Phase 2	Scheduled			
17	Main Works Yard - Traffic	Audits Phase 2	Scheduled			
18	Main Works Yard - Parks	Audits Phase 2	Downloaded to AuditPlanner			
19	Main Works Yard - Maintenance	Audits Phase 2	Scheduled			
29	Fire Hall 1	Audits Phase 3	Downloaded to AuditPlanner			
30	Fire Hall 1 - Site	Audits Phase 3	Downloaded to AuditPlanner			
31	Fire Hall 2	Audits Phase 3	Downloaded to AuditPlanner			
32	Fire Hall 2 - Site	Audits Phase 3	Scheduled			
33	Marroystone Museum	Audits Phase 3	Downloaded to AuditPlanner			
34	Marroystone Museum	Audits Phase 3	Downloaded to AuditPlanner			
35	Marroystone Museum	Audits Phase 3	Uploaded from AuditPlanner			
36	Marroystone Museum - Site	Audits Phase 3	Downloaded to AuditPlanner			
37	Monfort Heights Recreation Center	Audits Phase 3	Scheduled			
38	Monfort Heights Recreation Cen...	Audits Phase 3	Scheduled			
39	Bountiful Springs Arena	Audits Phase 3	Downloaded to AuditPlanner	Comprehensive	Don Wong	Ameresco

Audit Form: General

The general tab on the Audit provides information relating to: Audit Assignment, Audit Status and Audit Scheduling

>>To begin our next section **click on the Asset Details tab**

Back to List Save Publish View Published Inventory Audit PCA Report Audit Needs Report Browse Pictures

General Asset Details Audit Details

Audit Classification

Audit #: 4

Creation Method: * Create Audit from Inventory with attachments

Audit Data set is generated from the Inventory with all attachments (legacy creation and publishing method)

Asset Class: Building

Asset: * Dermott Arena

Audit Type: Comprehensive

Assigned Group: Ameresco

Assigned To: Dom Lepri

Audit Status

Status: Published

Scheduled Audit Date: 2012-10-02

Date Completed: 2012-10-13

Action Data Source: * Audit

Last Modified: 2017-10-24 10:26:13

Last Published:

Archived:

Audit Title: Arena Audits Phase 2 - 2012

Tabs across the top provide access to different parts of the audit.

The **Audit Status** indicates the current stage of the audit. While most are automatically updated by AuditPlanner™ the dropdown in the web tool allows Auditors to set the status to "Waiting for QA/QC" once ready for review.

The "Assigned To" field identifies the user that the audit has been assigned to and can be modified using the drop down list.

Audit Form: Asset Details

The Asset Details tab stores information about the asset such as size, address, etc. Including sections and summary fields.

>>To begin our next section click on the Audit Details tab

The screenshot shows the 'Audit 4 (Dermott Arena)' interface. At the top, there are navigation buttons: 'Back to List', 'Save', 'Publish', 'View Published Inventory', 'Audit BCA Report', 'Audit Needs Report', and 'Browse Pictures'. Below these are tabs for 'General', 'Asset Details', 'Audit Details', 'AuditPlanner Data Cache', and 'Audit History'. The 'Asset Details' section is active and contains the following fields:

Address:	3200 South Decker Lake Dr.	Floors Above Grade:	1
Construction Year:	1980		
Size (Sq.Ft.):	34209		

Below the 'Asset Details' section is the 'Asset Description' section, which contains a text box with the following text: "This is a one-storey structure predominantly wood board siding, and it is currently utilized as an arena. The original building was constructed circa 1980 and has had a variety of additions, renovations and updates."

At the bottom of the page, there are tabs for 'Custom Details', 'Building Details', 'Summary', and 'Attachments'. The 'Attachments' tab is selected, showing a 'Facility Attachments / Attachments' view. On the left, there is a 'Folders' pane showing a tree structure with 'Attachments' and 'Audit' folders. The main area displays two items: a yellow folder icon labeled 'Audit' and a photo thumbnail labeled 'asset.135.apecst8u.lm...'. A blue callout box points to an arrow icon in the top right corner of the Attachments view, stating: "You can expand the bottom half of the screen by clicking on this arrow."

Basic information about the asset can be viewed and updated. Changes will appear in Blue.

The bottom half of the Asset Details page contains tabs for additional information & attachments. Attachments contains the "cover photo" and any additional asset level pictures organized in the "Audit" folder.

You can expand the bottom half of the screen by clicking on this arrow.

Audit Form: Audit Details (Data Grid)

The Audit Details (Data Grid) tab contains a listing of inventory items (Elements) that make up the selected Audit and their renewal needs (Actions).

For Auditors: If you are looking to Add an Element that is not visible in the listing check the "Show All" box. This will reveal all available Elements in the selected audit.

For Audit Assigners only: Add/Remove Elements modifies what is available to an Auditor. **Caution:** if an audit is in progress this function could potentially remove Elements that contain data.

Data fields within the grid can be modified by clicking into a cell, drop down fields will be available where applicable.

Right click to **Add/Delete Elements or Actions** within the data grid. Pictures can also be attached using the right click menu.

Review Request	Category	Element Number	Reviewed	Replacement Cost	Last Major Action	Element Description	Element Commentary
	A10 - Foundations	1	<input type="checkbox"/>	66,438	1980	Concrete foundation.	No issues reported regarding the
	B10 - Superstructure	1	<input type="checkbox"/>	981,243	1980	Steel frame and concrete block structure.	Superstructure condition, no issues reported or ob
	B2010 - Exterior Walls	1	<input type="checkbox"/>	53,151	1980	Wood board siding.	Wood board siding in fair condition. Wood board siding have started to deteriorate, and peeling paint was observed in some areas.
	B2010 - Exterior Walls	1	<input type="checkbox"/>	53,151	1980	Wood board siding.	Wood board sidings are generally in fair condition. Some wood boards have started to deteriorate, and peeling paints were observed in some areas.
	B2010 - Exterior Walls	1	<input type="checkbox"/>				
	B2010 - Exterior Walls	2	<input type="checkbox"/>				
	B2010 - Exterior Walls	2	<input type="checkbox"/>			finished standing seam metal cladding, 6,464 sq.	Corrosion was observed on several metal siding fasteners. Excessive organic staining was observed on the metal siding panels of the north elevation.
	B2010 - Exterior Walls	2	<input type="checkbox"/>			finished standing seam metal cladding, 6,464 sq.	Corrosion was observed on several metal siding fasteners. Excessive organic staining was

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Audit Review:

Adding & addressing review notes.

Reviewing Audit Details (Data Grid)

Once you have found an Audit you would like to review using the Audit List open up the Audit Details tab to review changes to Elements & Action data.

Review Request	Category	Element Number	Reviewed	Replacement Cost	Last Major Action	Element Description	Element Commentary	Overall Condition
	A10 - Foundations	1	<input type="checkbox"/>	66,438	1980	Concrete foundation.	No issues reported or observed regarding the foundations.	Good
	B10 - Superstructure	4	<input type="checkbox"/>	981,243	1980	Steel frame and concrete block structure.	Superstructure is in good condition, no structural issues reported or observed.	Good
	B10 - Superstructure	1	<input type="checkbox"/>	1,000,000	1980	Concrete block structure.		Good
	B2010 - Exterior Walls	1	<input type="checkbox"/>	75,000	1980	Vinyl siding.	Vinyl siding is generally in fair condition.	Fair
	B2010 - Exterior Walls	1	<input type="checkbox"/>	75,000	1980	Vinyl siding.	Vinyl siding is generally in fair condition.	Fair
	B2010 - Exterior Walls	1	<input type="checkbox"/>	75,000	1980	Vinyl siding.	Vinyl siding is generally in fair condition.	Fair
	B2010 - Exterior Walls	2	<input type="checkbox"/>	231,001	1980	Pre-finished standing seam metal cladding. 6,464 sq. feet.	Corrosion was observed on several metal siding fasteners. Excessive organic staining was observed on the metal siding panels of the north elevation.	Poor
	B2010 - Exterior Walls	2	<input type="checkbox"/>	231,001	1980	Pre-finished standing seam metal cladding. 6,464 sq. feet.	Corrosion was observed on several metal siding fasteners. Excessive organic staining was observed on the metal siding panels of the north elevation.	Poor
	B2010 - Exterior Walls	3	<input type="checkbox"/>	53,151	1980	Painted concrete block walls as in-fill between steel structural members.	Exterior walls are generally in good condition with major no cracks or damages. Peeling paint was observed in some areas.	Good
	B2010 - Exterior Walls	3	<input type="checkbox"/>	53,151	1980	Painted concrete block walls as in-fill between steel structural members.	Exterior walls are generally in good condition with major no cracks or damages. Peeling paint was observed in some areas.	Good

Green lines indicate Elements or Actions that have been added.

Hover over a modified cell to view the original value.

Original Value: 53,151

Red lines indicate Deleted Elements or Actions.

Blue cells indicate modified values.

Adding Review Notes (Audit Reviewer)

When reviewing an audit you can flag problems or ask the auditor a question by adding a review note. Any lines with a review note will be indicated by a red flag in the "Review Request" column.

The screenshot displays the 'Audit Validation Grid' interface. At the top, there are tabs for 'Audit Validation Grid', 'Audit Element Form', and 'Map'. Below the tabs is a toolbar with options: 'Show All', 'Track Changes' (checked), 'Add', 'Delete', 'Grid mode', 'Filters', 'Reviewed', 'History...', and 'Export History'. The main table has the following columns: 'Review Request', 'Category', 'Element Number', 'Reviewed', 'Replacement Cost', 'Last Major Action', 'Element Description', 'Element Commentary', and 'Overall Condition'. The table contains several rows of data, some with red flags in the 'Review Request' column and red outlines around certain cells. Callout boxes provide instructions on how to use these features.

Review Request	Category	Element Number	Reviewed	Replacement Cost	Last Major Action	Element Description	Element Commentary	Overall Condition
	A10 - Foundations	1	<input type="checkbox"/>	66,438	1980	Concrete foundation.	No issues reported or observed regarding the foundations.	Good
	B10 - Superstructure	4	<input type="checkbox"/>	981,243	1980	Steel frame and concrete block structure.	Superstructure is in good condition, no structural issues reported or observed.	Good
	B10 - Superstructure	1	<input type="checkbox"/>	1,000,000	1980	Concrete block structure.		Good
	B2010 - Exterior Walls	1	<input checked="" type="checkbox"/>	75,000	1980	Vinyl siding.	Vinyl siding is generally in fair condition.	Fair
	B2010 - Exterior Walls	1	<input checked="" type="checkbox"/>	75,000	1980	Vinyl siding.		Fair
	B2010 - Exterior Walls	1	<input checked="" type="checkbox"/>	75,000	1980	Vinyl siding.		Fair
	B2010 - Exterior Walls	2	<input type="checkbox"/>	231,001	1980	Pre-finished standing seam metal cladding, 6,464 sq. feet.	Corrosion was observed on several metal siding fasteners. Excessive organic staining was observed on the metal siding panels of the north elevation.	Poor
	B2010 - Exterior Walls	2	<input type="checkbox"/>	231,001	1980	Pre-finished standing seam metal cladding, 6,464 sq. feet.	Corrosion was observed on several metal siding fasteners.	Poor
	B2010 - Exterior Walls	01	<input type="checkbox"/>	1980		Original Value: 1980 Comment (by Joseph Iusi): This is not when they were installed Reply: We were informed by site staff that 1980 is the date of installation		Poor
	B2010 - Exterior Walls	3	<input type="checkbox"/>	53,151	1980	Painted concrete block walls	Exterior walls good condition, no cracks or delamination was observed on the metal siding panels of the north elevation.	
	B2010 - Exterior Walls	3	<input type="checkbox"/>	53,151	1980	Painted concrete block walls	Exterior walls good condition, no cracks or delamination was observed on the metal siding panels of the north elevation.	

Red flags indicate rows where a review note has been added.

Cells with a red outline indicate where a review note has been added.

Hover over a red outlined cell and the review note will appear.

Right click on a cell and select "Add Comment" to leave a review note.

- Add Element
- Delete Element
- Add Action
- Delete Action
- Add Comment...

Addressing Review Requests (Auditors)

Once an audit has been reviewed the building auditor can open the audit to make any required revisions. An auditor can reply to any review note (if additional context is needed) and/or check the "Reviewed" box to indicate they have made the appropriate revision. Once the "Reviewed" box is checked the flag will disappear however the review note will be maintained for change tracking purposes.

The screenshot displays the 'Audit Validation Grid' interface. At the top, there are tabs for 'Audit Validation Grid', 'Audit Element Form', and 'Map'. Below the tabs is a toolbar with options: 'Show All', 'Track Changes' (checked), 'Add', 'Delete', 'Grid mode', 'Filters', 'Reviewed', 'History...', and 'Export History'. The main table has columns: 'Review Request', 'Category', 'Element Number', 'Reviewed', 'Replacement Cost', 'Last Major Action', 'Element Description', 'Element Commentary', and 'Overall Condition'. The table contains several rows of data, with some cells highlighted in red or blue. A red box highlights the 'Reviewed' checkbox for the row with 'B10 - Superstructure' and 'Element Number 4'. A blue box highlights the 'Reviewed' checkbox for the row with 'B2010 - Exterior Walls' and 'Element Number 1'. A blue callout box points to the 'Reviewed' checkbox for the row with 'B2010 - Exterior Walls' and 'Element Number 1', containing the text: 'Once the requested revisions are made the building auditor can check the Reviewed box to remove the review request flag'. Another blue callout box points to the 'Reviewed' checkbox for the row with 'B2010 - Exterior Walls' and 'Element Number 2', containing the text: 'To respond to a review request right click on the red highlighted cell and select Edit/Reply Comment'. A context menu is open over the 'Reviewed' checkbox for the row with 'B2010 - Exterior Walls' and 'Element Number 2', showing options: 'Add Element', 'Delete Element', 'Add Action', 'Delete Action', 'Edit/Reply Comment...', 'Remove Comment...', 'Change Category ...', 'Revert to original value', 'Restore Element', 'Restore Action', 'Force Publish', and 'Add Attachment/Picture'.

Review Request	Category	Element Number	Reviewed	Replacement Cost	Last Major Action	Element Description	Element Commentary	Overall Condition
	A10 - Foundations	1	<input type="checkbox"/>	66,438	1980	Concrete foundation.	No issues reported or observed regarding the foundations.	Good
	B10 - Superstructure	4	<input type="checkbox"/>	984,243	1980	Steel frame and concrete block structure.	Superstructure is in good condition, no structural issues reported or observed.	Good
	B10 - Superstructure	1	<input type="checkbox"/>	1,000,000	1980	Concrete block structure.		Good
			<input checked="" type="checkbox"/>	75,000	1980	Vinyl siding.	Vinyl siding is generally in fair condition.	Fair
			<input checked="" type="checkbox"/>	75,000	1980	Vinyl siding.	Vinyl siding is generally in fair condition.	Fair
	B2010 - Exterior Walls	1	<input checked="" type="checkbox"/>	75,000	1980	Vinyl siding.	Vinyl siding is generally in fair condition.	Fair
	B2010 - Exterior Walls	2	<input type="checkbox"/>	231,001	1980	Pre-finished standing seam metal cladding, 6,464 sq. feet.	Corrosion was observed on several metal siding fasteners. Excessive organic staining was observed on the metal siding panels of the north elevation.	Poor
	B2010 - Exterior Walls	2	<input type="checkbox"/>	231,001	1980		Corrosion was observed on several metal siding fasteners. Excessive organic staining was observed on the metal siding panels of the north elevation.	Poor
	B2010 - Exterior Walls	2	<input type="checkbox"/>	231,001	1980		Corrosion was observed on several metal siding fasteners. Excessive organic staining was observed on the metal siding panels of the north elevation.	Poor
	B2010 - Exterior Walls	3	<input type="checkbox"/>	53,151	1980		Exterior walls are generally in good condition with major no cracks or damages. Peeling paint as observed in some areas.	Good
	B2010 - Exterior Walls	3	<input type="checkbox"/>	53,151	1980		Exterior walls are generally in good condition with major no cracks or damages. Peeling paint as observed in some areas.	Good
	B2020 - Exterior Windows	1	<input type="checkbox"/>	5,111	1980		Windows are generally in fair	Fair

Assigning Audits: Using the Audit Wizard

Audit Wizard

Using the “Audits” menu go to “Find Audits” to load the Audit List. At the top of the audit list click on the “Audit Wizard” to create and assign a new audit or audits.

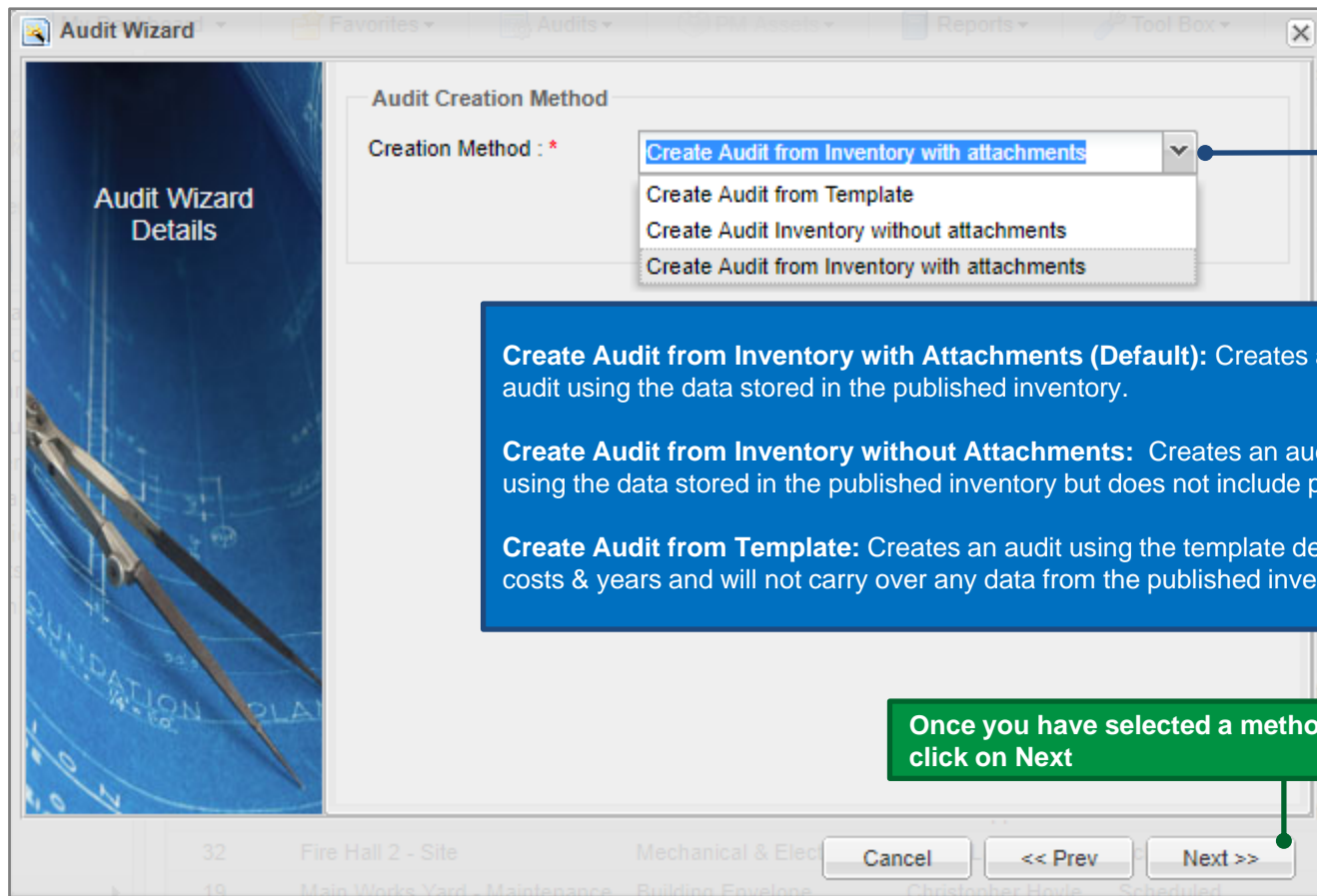
First click on the Audit Wizard button.

A pop-up Audit Wizard box will appear and will guide you through the steps. Click on Next to begin

Asset	Summary	Status	Audit Type	Assigned To	Assigned Group
5	Nich...				Ameresco
6	North				Ameresco
7	North				Ameresco
13	City f				Ameresco
14	City f				Ameresco
15	Main				Ameresco
16	Main				Ameresco
17	Main				Ameresco
18	Main				Ameresco
19	Main				Ameresco
29	Fire t				Ameresco - Ma...
30	Fire t				Ameresco - Ma...
31	Fire t				sco
32	Fire t				sco - Ma...
33	Marr				sco
34	Marr				Ameresco
35	Marr				Ameresco
36	Marr				Ameresco
37	Mont				Ameresco
38	Monfort Heights Recreation Cen...	Audits Phase 3	Scheduled	Jeff Hubert	Ameresco
39	Bountiful Springs Arena	Audits Phase 3	Downloaded to AuditPlanner	Don Wong	Ameresco

Audit Wizard: Creation Method

The first step is to select the Creation Method which will tell the system the type of audit you would like to perform. Below is a description of each but if you are unsure use the default option to Create Audit from Inventory with Attachments.



The screenshot shows the 'Audit Wizard' window with the 'Audit Creation Method' section. The 'Creation Method' dropdown menu is open, showing three options: 'Create Audit from Inventory with attachments' (highlighted), 'Create Audit from Template', and 'Create Audit Inventory without attachments'. A blue callout box provides descriptions for each option. A green callout box points to the 'Next >>' button, indicating the next step after selection.

Audit Wizard Details

Audit Creation Method

Creation Method : *

- Create Audit from Inventory with attachments
- Create Audit from Template
- Create Audit Inventory without attachments
- Create Audit from Inventory with attachments

Create Audit from Inventory with Attachments (Default): Creates an audit using the data stored in the published inventory.

Create Audit from Inventory without Attachments: Creates an audit using the data stored in the published inventory but does not include photos.

Create Audit from Template: Creates an audit using the template default costs & years and will not carry over any data from the published inventory.

Once you have selected a method click on Next

32 Fire Hall 2 - Site Mechanical & Elec
19 Main Works Yard Maintenance Building Envelope Customer Home Services

Cancel << Prev Next >>

Audit Wizard: Classification & Assignment

Now that we have selected the Creation Method we now need to classify the audit by selecting the audit type and assign it to a specific user.

The screenshot shows the 'Audit Wizard' window with the following fields and sections:

- Audit Title:** A text input field.
- Audit classification:** A section containing:
 - Audit Type: *** A dropdown menu.
 - Assigned Group:** A dropdown menu.
 - Assigned To: *** A dropdown menu.
 - Provider:** A dropdown menu.
- Audit Status:** A section containing:
 - Status: *** A dropdown menu with 'Scheduled' selected.
 - Scheduled Audit Date:** A date picker field.
 - Action Data Source: *** A dropdown menu.

At the bottom of the window, there are navigation buttons: 'Cancel', '<< Prev', and 'Next >>'. The 'Next >>' button is highlighted with a green callout box.

Audit Type is the classification of the audit. This field is useful to differentiate between multiple audits (ex. Comprehensive, Architectural, Mechanical & Electrical, etc.)

Status should remain as "Scheduled" as this is the first step in the audit process. You may also provide the scheduled date if available (optional field)

Action Data Source this field will identify the data source of the audit when published. Typically this will be pre-defined based on the type, for example "BCA Audit 2017"

Audit Title (or Summary) is an optional field. It may be useful to provide additional context to an auditor in large projects (ex. Phase 1 Audits, Northern Region Audits)

Assigned Group: is the user group that the auditor belongs to

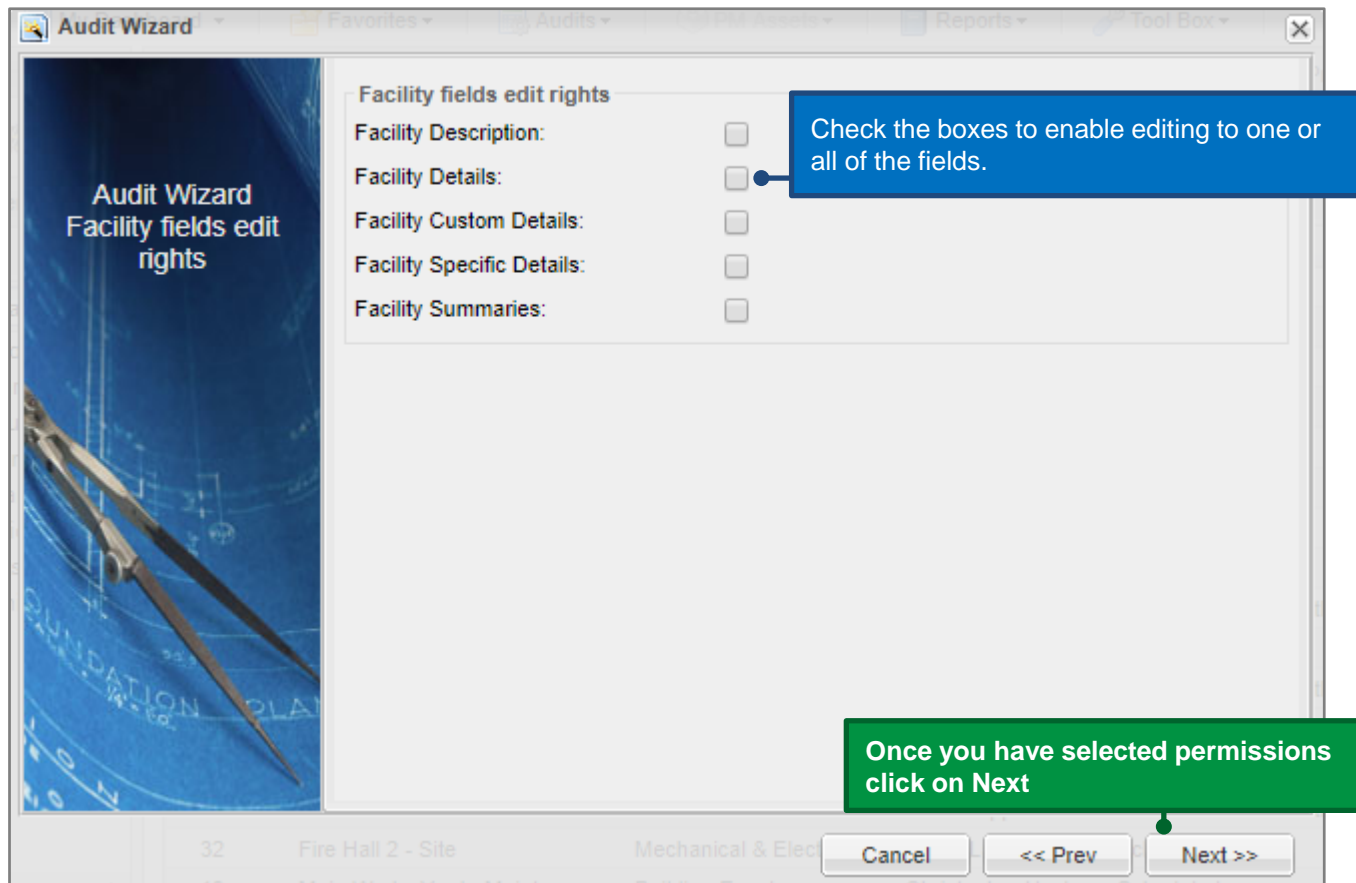
Assigned To: is the specific user who will be performing the audit

Provider: is the vendor name (if the audit is being conducted by an outside contractor)

Once you have classified and audit the audit click on Next

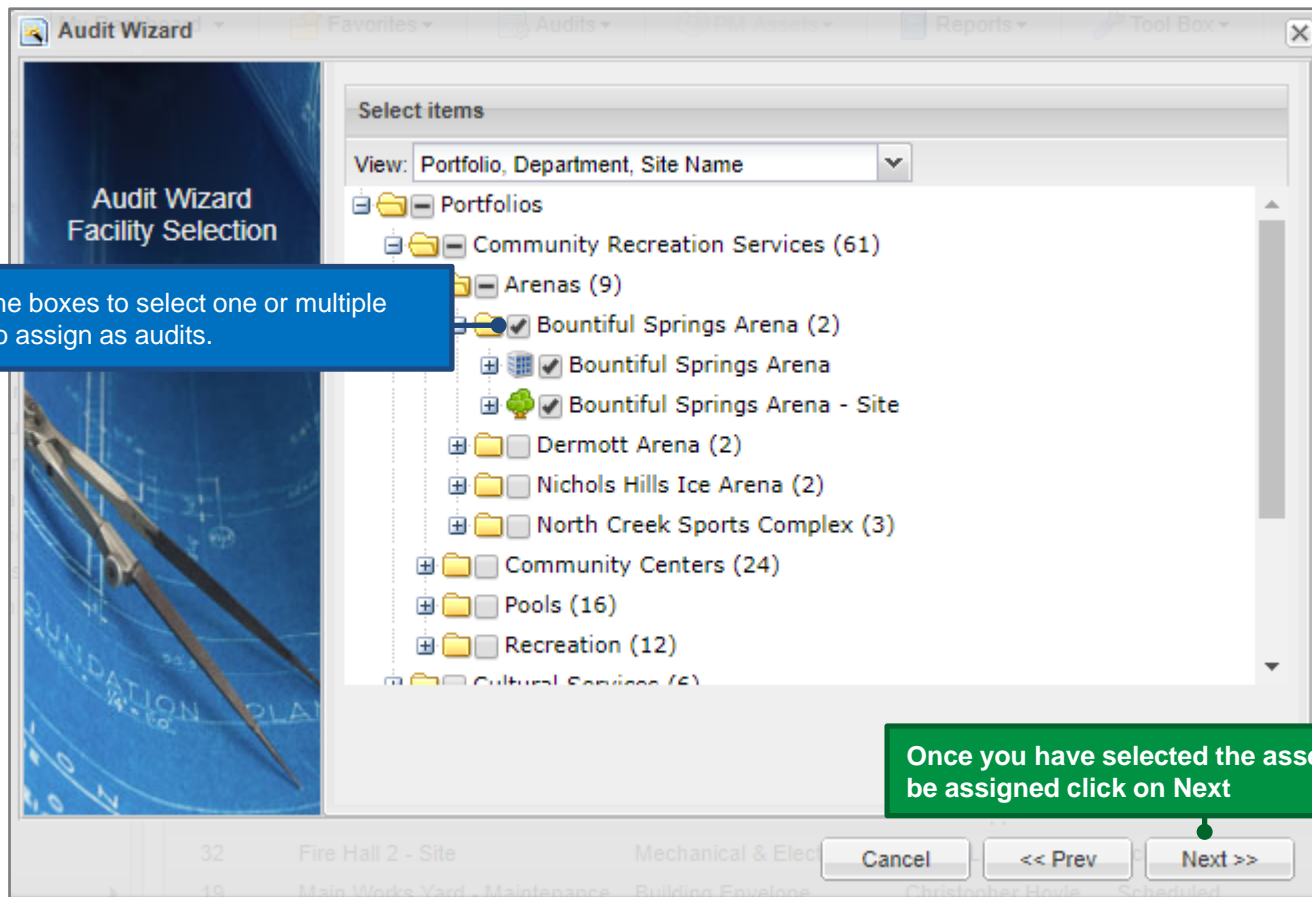
Audit Wizard: Edit Permissions

The next step is to enable permissions to the main audit fields (if applicable). If you are assigning a comprehensive Audit you would typically allow edit rights to all of these fields by clicking the checkboxes beside each.



Audit Wizard: Asset Selection

The next step is to select the assets to be created as audits and assigned to the user. Multiple assets can be assigned using the checkboxes.

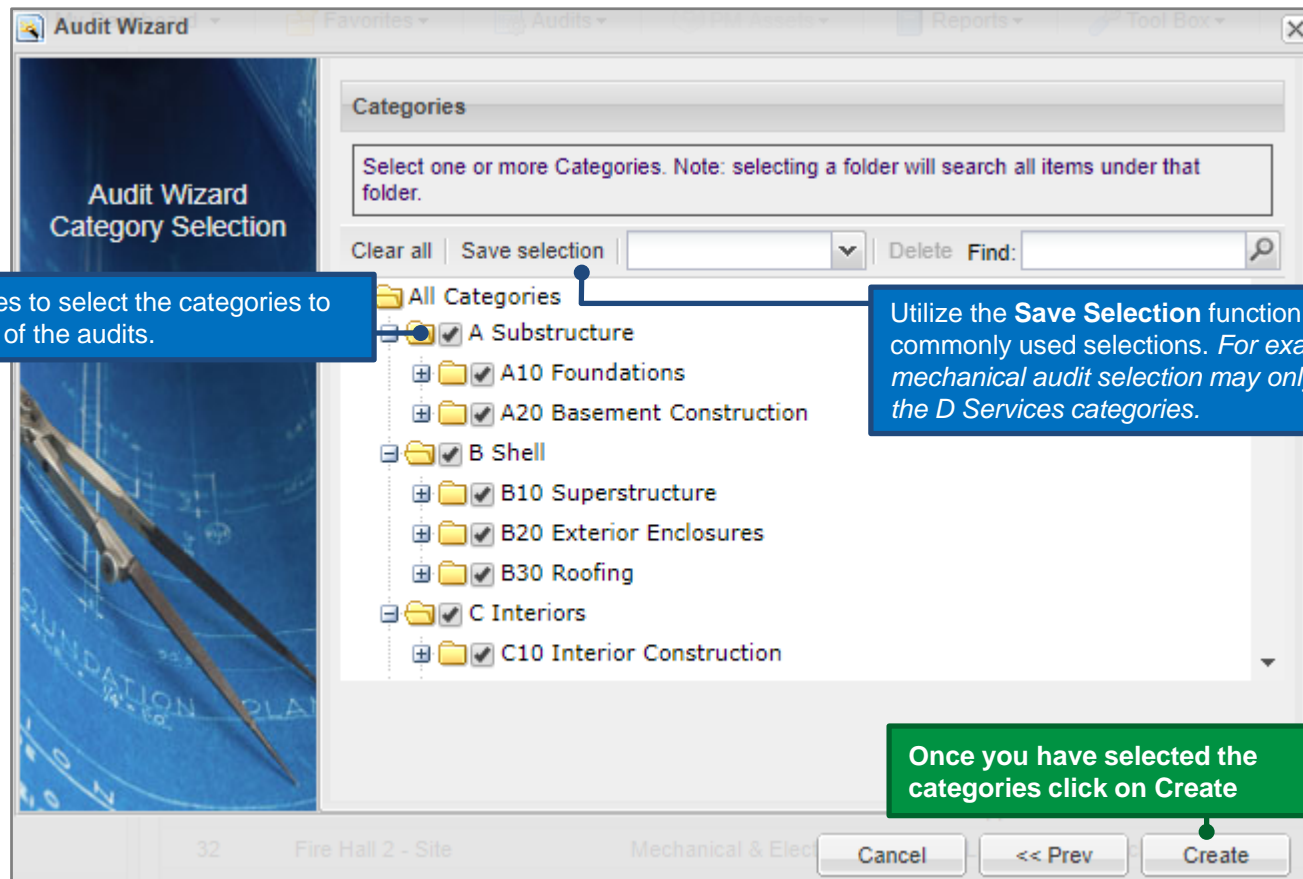


Check the boxes to select one or multiple assets to assign as audits.

Once you have selected the assets to be assigned click on Next

Audit Wizard: Category Selection

The next step is to select the categories to include with each audit. The category selection can enable an auditor access to all or only selected categories depending on the type of audit classification. Category selections can be saved to simplify the process and standardize the categories selected for specific audit classifications.



Check the boxes to select the categories to include as part of the audits.

Utilize the **Save Selection** function to save commonly used selections. *For example a mechanical audit selection may only include the D Services categories.*

Once you have selected the categories click on **Create**

Audit Wizard: Audit Creation

Once an audit has been created it will become immediately available to the assigned auditor on their mobile device using AuditPlanner™ They will also be able to view, update & modify using the web Audit Manager.

