

## CREATING AND ASSIGNING AUDITS

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*Date Modified:*

## Introduction

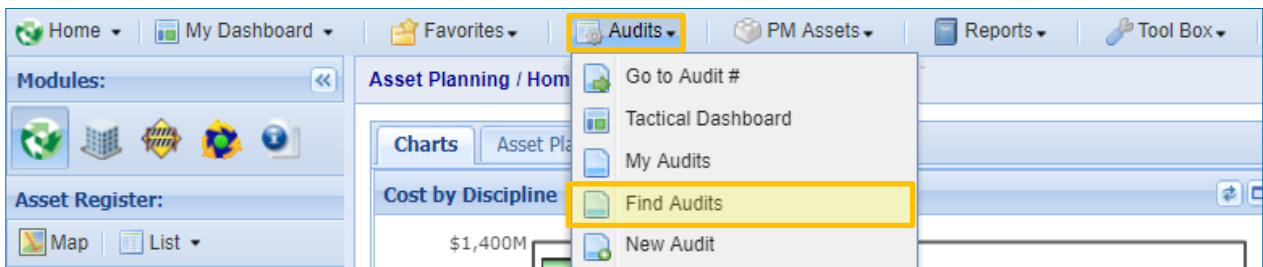
This procedure document lists the steps to create and assign Audits in AssetPlanner™. Using the web Audit Manager, District Administrators can create and assign Audits for Assets within their database.

## Creating & Assigning Audits

Before we begin, ensure that each Auditor has a **User Account** created and has been added to a **User Group**. Refer to the **Creating Users & User Groups Procedure** document for more information.

### Step 1

Click on **Audits** from the menu bar and select **Find Audits**.



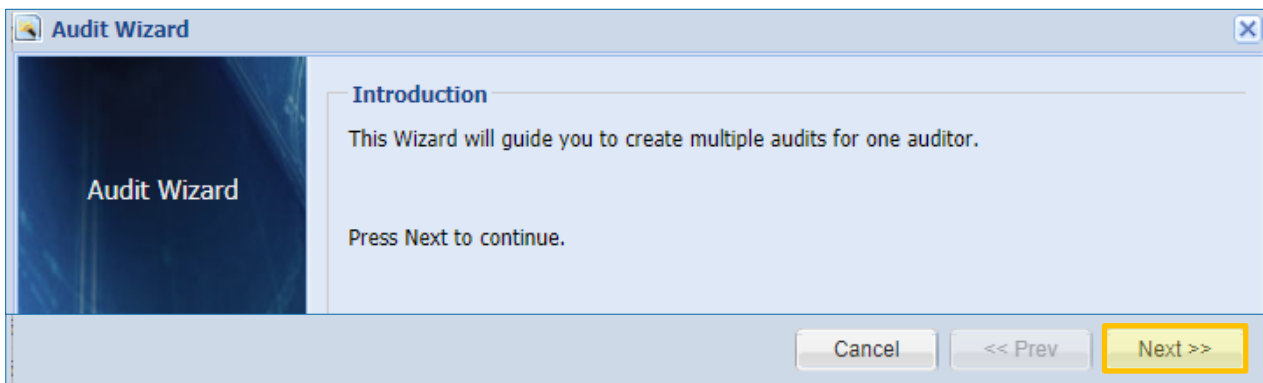
### Step 2

Select the **Audit Wizard** from the Audits menu bar.

Audit ID	Asset	Di...	School District	Scho...	School Name	Sc...	Last Published
2	Adair County Middle School	001	Adair County	014	Adair County Middle School	A1	2017-09-06 1...
3	Allen County Primary Center	005	Allen County	010	Allen County Primary Center	A1	2017-09-05 1...
4	Anchorage Independent Public School	006	Anchorage Independent	010	Anchorage Independent Public ...	A1	2017-09-06 1...

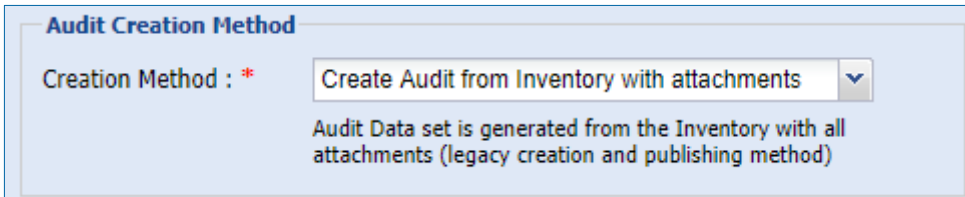
### Step 3

The **Audit Wizard** will appear as a pop-up box and will guide you through the steps to create an Audit. Click on **Next** to continue.



## Step 4

Select the **Audit Creation** method and click **Next** to continue.



The screenshot shows a window titled "Audit Creation Method". It contains a label "Creation Method : \*" followed by a dropdown menu. The dropdown menu is open, showing the selected option "Create Audit from Inventory with attachments". Below the dropdown, there is a text description: "Audit Data set is generated from the Inventory with all attachments (legacy creation and publishing method)".

**Note:** Refer to the References section for a description of each method and common uses.

## Step 5

Specify the **Audit Type** and then assign the Audit using the **Assigned Group (User Group)** and the **Assigned To (User)** drop down fields. Once you have assigned the Audit select the **Action Data Source** using the drop down (ex. Audit 2017) then click **Next** to continue.

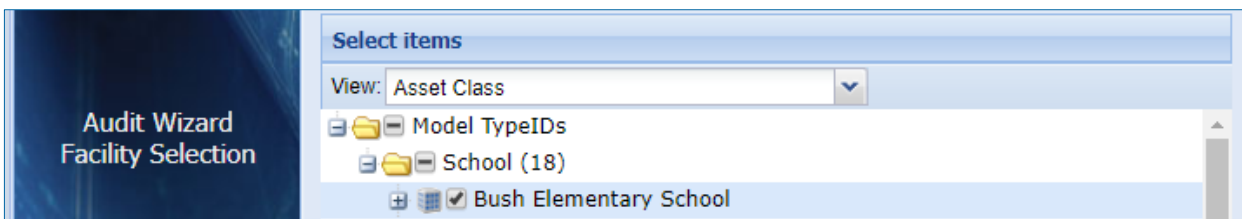
**Reminder:** All Auditors must have User accounts and should be members of a User Group.

## Step 6

Specify the **Facility Edit Rights** you would like to provide to the Auditor User. **Check the boxes** to provide edit rights to the Facility Fields listed. Click **Next** to continue.

## Step 7

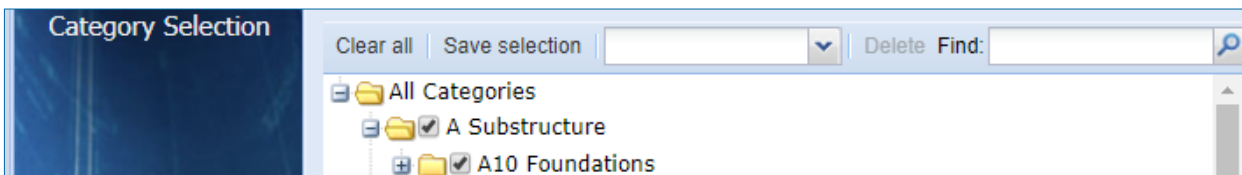
Select the **Facility or Facilities** you would like to assign as Audits using the **check boxes** and click **Next** to continue.



The screenshot shows a window titled "Audit Wizard Facility Selection". It has a "Select items" header and a "View: Asset Class" dropdown. Below this, there is a list of items: "Model TypeIDs", "School (18)", and "Bush Elementary School". The "Bush Elementary School" item is selected, indicated by a checkmark in a box.

## Step 8

Select the **Categories** you would like to include as part of the Audit using the **check boxes** and click **Create** to finalize the process and create the audits. You can save commonly used Category selections by using the **Save Selection** button.



The screenshot shows a window titled "Category Selection". It has a "Clear all" button, a "Save selection" button, a dropdown menu, and a "Delete Find:" search field. Below this, there is a list of categories: "All Categories", "A Substructure", and "A10 Foundations". The "A Substructure" and "A10 Foundations" items are selected, indicated by checkmarks in boxes.

Once created the Audits will be available to the assigned User to download using AuditPlanner™ and will also be visible to them in the web Audit Manager.

## Reminders

- If an auditor user does not have an account, it must be created (User & User Group) in AssetPlanner™ prior to creating and assigning an audit. Refer to the **Creating Users & User Groups Procedure** for more information.
- If a building is not in the Asset Register, it cannot be created as an audit. Refer to the **Adding Facilities to the Asset Register Procedure** for more information.
- Prior to creating an audit, the District should perform an **Asset Review** and review/update all Facility Details & Sections. Refer to the **Asset Review Procedure** for more information.
- If an Audit is being done by multiple assessors (ex. Architectural & Mechanical/Electrical) you must create two audits. Assign each audit to the specific user and only select the categories that they will be reviewing (ex. Architectural user is assigned Disciplines A, B & C)
- Once an audit has been assigned the District should not make any changes to the Published Element Inventory (live data) until the audit is completed & Published.

## References: Audit Creation Methods

The Audit Creation Method tells the system how much of the existing data from the Published Element Inventory to include when creating a new Audit.

**Create Audit from Inventory with Attachments (Default):** This will create the Audit using data and attachments stored in the published inventory.

If you have modified data in the Published Audit Inventory as part of an Asset Review this method will include all data & attachments that you have added.

This method is also useful when a prior audit was conducted, and you want to review pictures and provide updates to refresh existing data.

**Create Audit from Inventory without Attachments:** This will create the Audit using data stored in the published inventory. Existing attachments will not be included and will be archived when the Audit is Published.

This method is useful when a prior audit was conducted, and you want to perform a refresh audit of the data and include new pictures.

**Create Audit from Template:** This will create the audit using the template default costs & years and will not carry over any data or attachments from the published inventory.

This method is useful when a prior audit was conducted but you would like to start fresh using the template data. It will carry forward no existing attachments or data (description/commentary fields will be cleared).