User Guide

Creating an Audit

SIMPPLE

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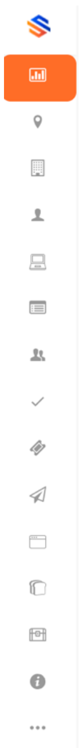
The Audit Module

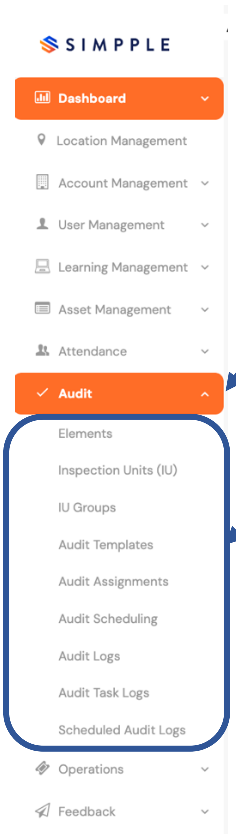
The Audit Module allows for *Audit Reports* to be created, customised, and completed within the Simpple system. Audit reports are an essential part of any service business as they can provide transparency between clients and service providers.

The Simpple audit module has an extensive range of settings and options to be configured. This allows the user to create an effective audit that captures all required information and creates tasks for re-touch up work if required.

Key Interface Areas



Hover over the sidebar (left) to bring up the expanded Simpple Menu (Right)



Click on the arrow on the *Audit* line to expand the full audit menu.

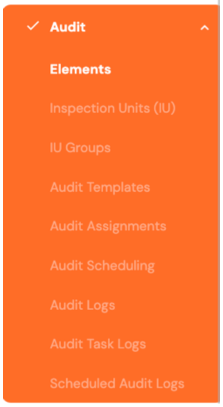
This is where an audit can be created and reviewed once it has been completed.

Audits can only be completed within the Simpple mobile app.

Creating an Audit

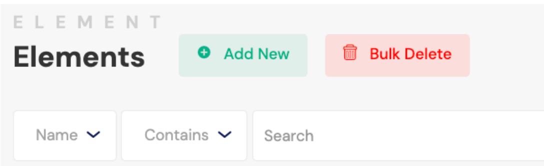
Audits can be created by any staff members who have access to the full Simpple web system. Through the creation process, many aspects of the audit can be customised, including, scoring system, schedules, signatures required, task generation, etc.

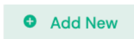
1. Elements

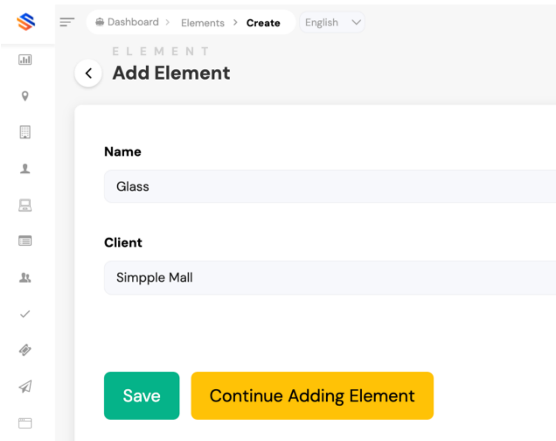


Elements are the base of your audit and are generally the specific areas of interest within the audit. For example, an element could be mirror, floor, sink, toilet, etc.

1. Navigate to the *Elements* section of the Audit menu.



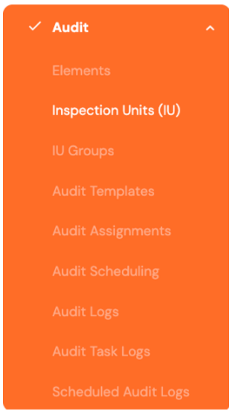
2. Click on the  button at the top of the screen.



4. Add the name of your *Element* and select your site from the *Client* drop down list.

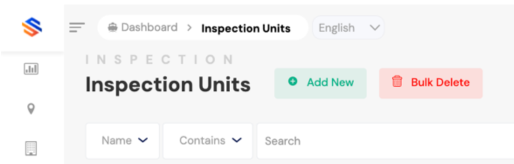
3. If you have finished adding *Elements,* then click **Save.**
   To add more *Elements,* click on **Continue Adding Element.**

2. Inspection Units (IU)

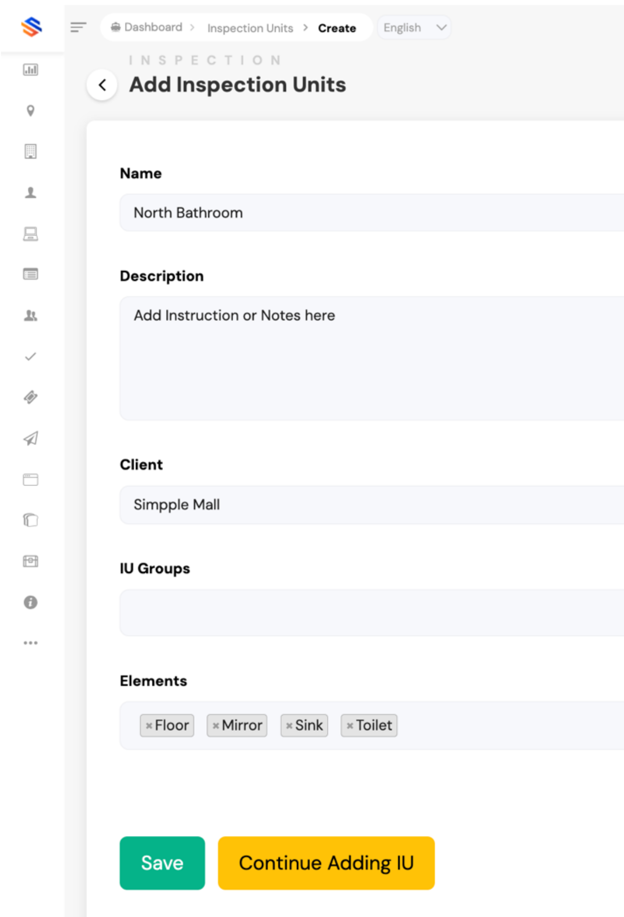


Inspection Units allow you to group the *Elements* that have just been created. This is where broader locations are created such as North Bathroom, Central Escalators, Food Court, etc.

1. Navigate to the *Inspection Units (IU)* section of the Audit menu.



8. Click on the Add New button at the top of the screen.



5. Add a ***Name*** for your location/inspection unit.

7. ***Description*** is not a required field but can be useful for adding instructions or notes for about the inspection unit.

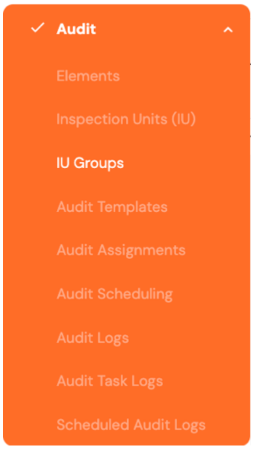
6. Select your site from *the* ***Client*** drop down list.

4. The ***IU Groups*** section should not be filled out. This will auto-fill after the next section.

3. Select your ***Elements*** from the dropdown menu. There is no limit to the amount of element that can be selected.

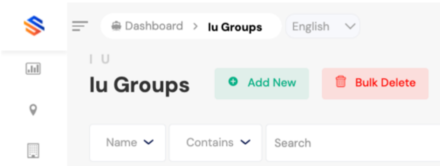
5. If you have finished adding *Inspection Units,* then click ***Save*.**
   To add more *Elements,* click on ***Continue Adding IU*.**

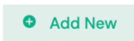
3. IU Groups

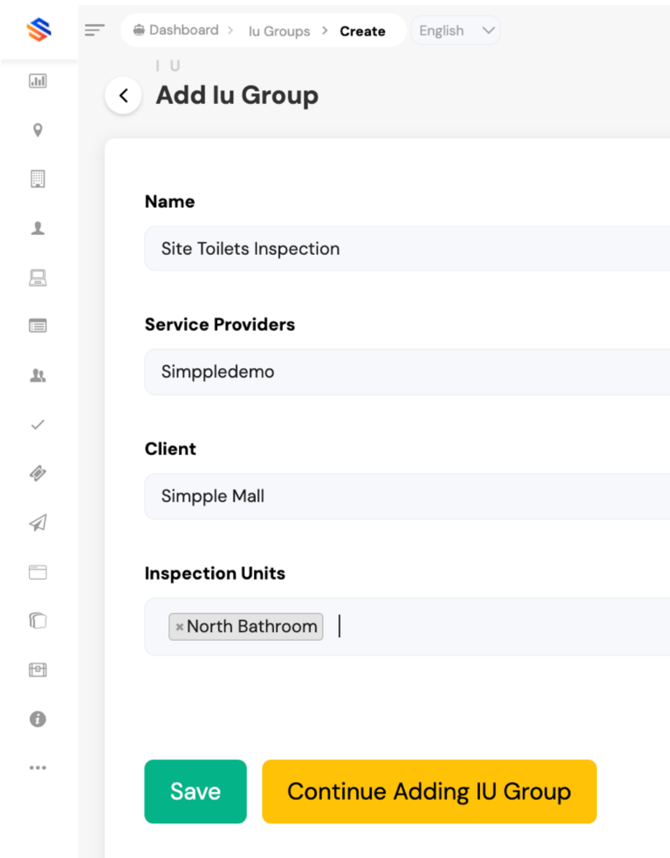


IU Groups allow for you to group Inspection Units to create sections of audits. For example, an IU Group may be named Mall Inspection, Toilet Inspection, Common Area Inspection, etc.

1. Navigate to the *IU Groups* section of the Audit menu.



2. Click on the  button at the top of the screen.



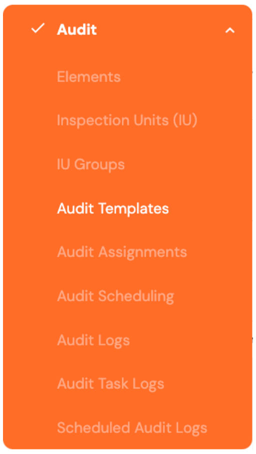
3. Add a ***Name*** to you IU Group (e.g. Mall Inspection, Toilet Inspection, Common Area Inspection)

4. Select you company from the ***Service Provider*** drop down menu and you site from the ***Client*** drop down.

5. Select all required ***Inspection Units*** from the drop down.

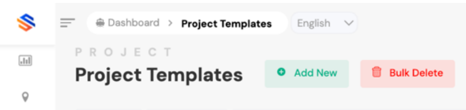
6. If you have finished adding *Inspection Units,* then click ***Save.***
   To add more *Elements,* click on ***Continue Adding IU Group***.

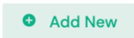
4. Audit Templates



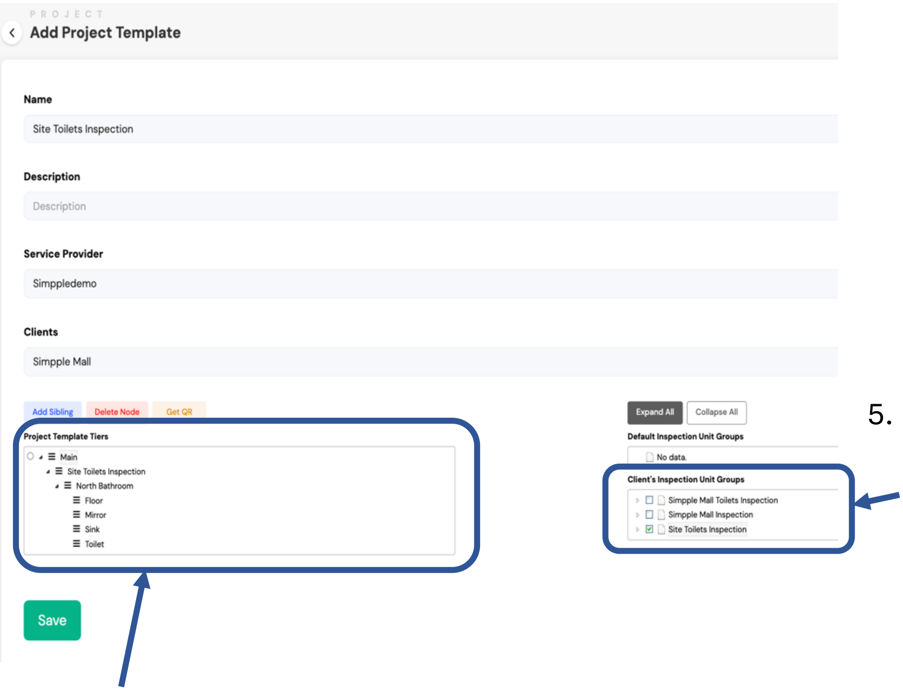
The *Audit Template* section is used to allocate the audit to the service provider and client and allows for visibility of the levels of the audit. Questions and queries can be rearranged to ensure your audit is completed in the correct order.

1. Navigate to the *Audit Templates* section of the Audit menu.



7. Click on the  button at the top of the screen.

6. Add a Name (generally the same name as used for the IU Group), a description if required, select your service provider and client from their dropdown menus.

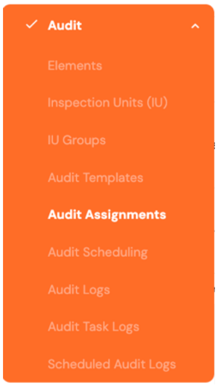


5. Select the correct audit inspection group within the *Client's Inspection Groups* section.

4. Once the *Inspection Unit Group* has been selected the *Project Template Tiers* will appear on the left part of the screen.
   This section allows the user to drag and drop the tiers of the audit to ensure they are ordered correctly.

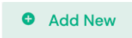
3. Once the ***Project Tiers*** are arranged correctly, click ***Save*** and move on to the ***Audit Assignment***.

5. Audit Assignments

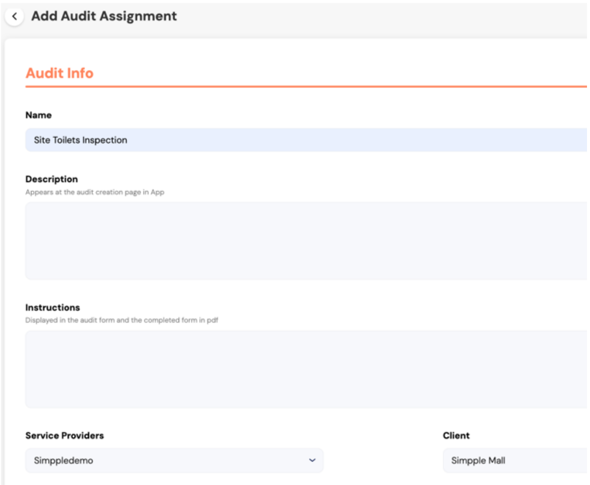


The *Audit Assignments* section is where the details of the audit are created. The audit type, rating system, reactionary tasks and sign off methods are all selected in this section.

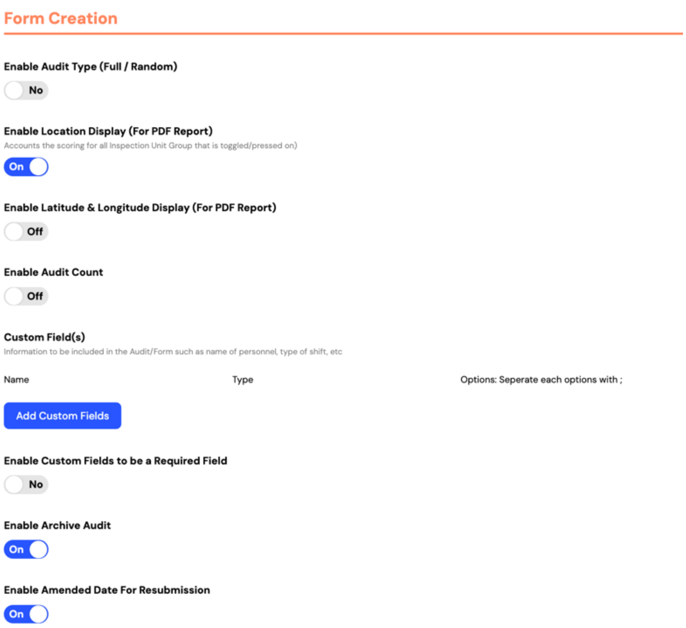
1. Navigate to the *Audit Assignments* section of the Audit menu.

2. Click on the 

button at the top of the screen.



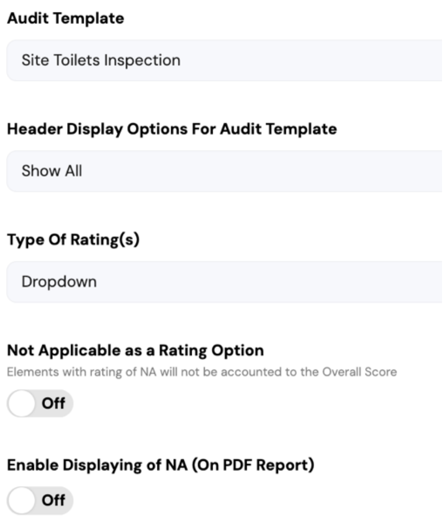
3. Enter your audit name (generally the same one used for the IU Group and Audit Template).
   If needed, a description and instructions can be entered here. These will be displayed at the top of the audit before it is completed.



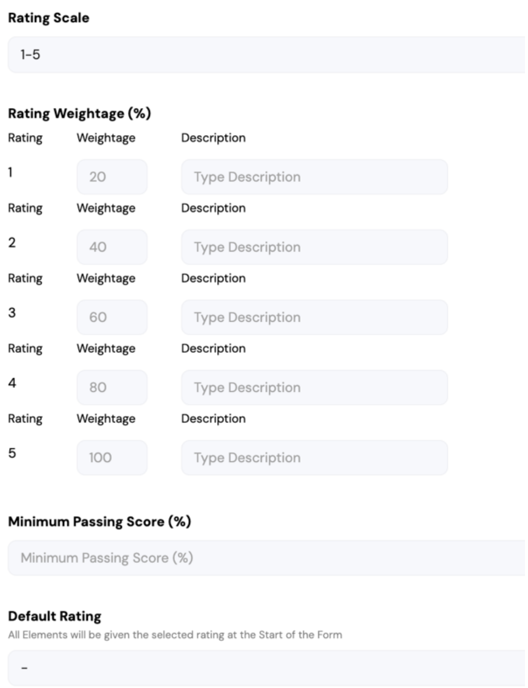
4. The first part of the Form Creation section allows for the selection of what details the audit will display once completed.

   The second part allows for input of the details that the auditor will be required to fill out, including custom fields.

   Custom Fields can either be Text, TextQR, Dropdown, Decimal, or Checkbox. There is no limit to the number of Custom Fields that can be added. These fields are displayed at the top of the audit and can request additional details from the auditor.



5. The next section of Form Creation is where the previously created audit template is select from the dropdown menu.
   The rating system is the then selected from the dropdown. Current option for rating system are: Dropdown, Star Rating, or Slider.
   Next, if the audit allows for a Not Applicable (N/A) response, this can be toggled and whether this should be displayed on the final PDF can also be toggled.

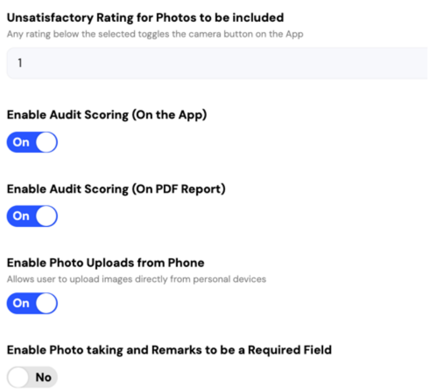


6. Depending on the rating system selected above, this section will look slightly different. Regardless, this is where the rating scale is selected.

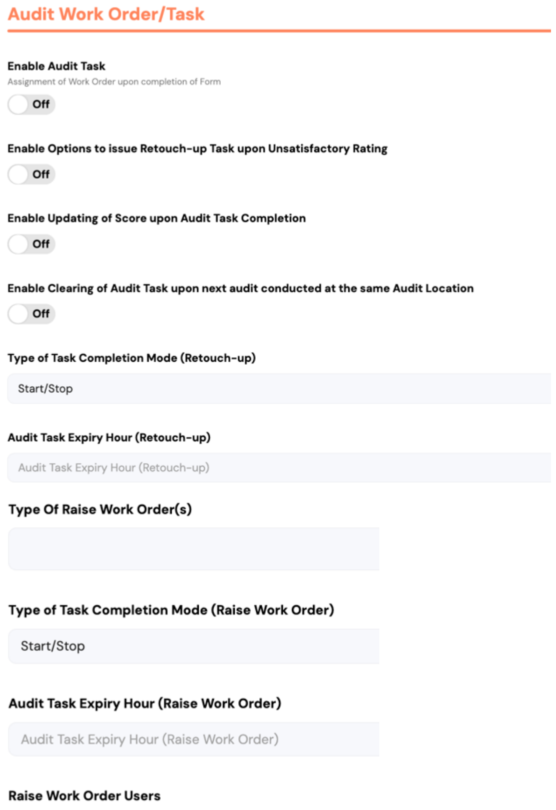
   The weighting of each score can be altered with free text.

   The description of each rating is what will be displayed on the audit when each section is scored. A typical option for a 1-5 rating system description is (Bad, Poor, Average, Good, Very Good).

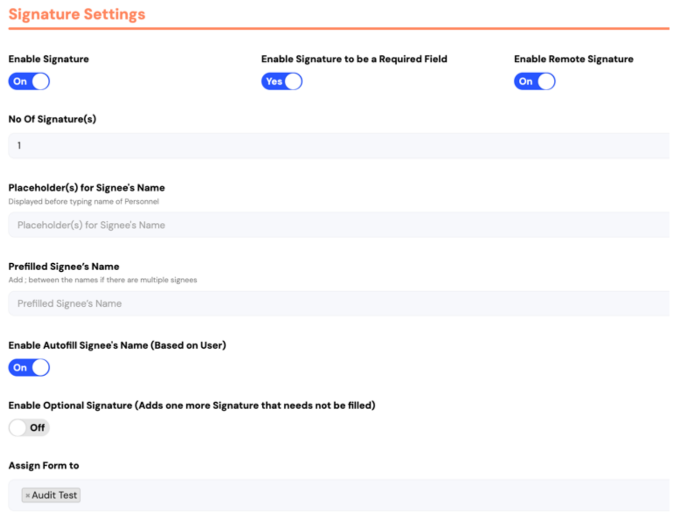
   Next the minimum passing score should be input, and the default rating selected from the dropdown.



7. This section allows for photo settings to be changed. If a score is below the selected level, the auditor will be prompted to take a photo of the affected area. This can also be a required field if needed.

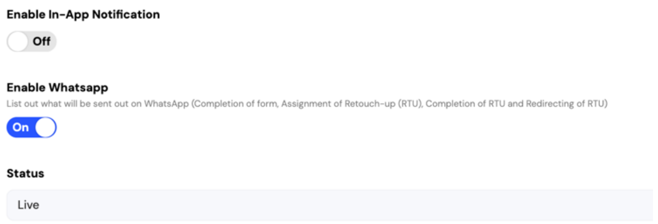


8. If a section of the audit is deemed to be unsatisfactory a work order can be sent to a nearby staff member. The setting for these work orders can be altered in this section. This will automatically generate a task and send it to the selected staff member when required.



9. The Signature Settings section is where the sign off requirements can be changed. None, one or multiple signatures can be selected. The required signees can be selected or just autofill the signature to whoever is viewing or completing the audit.

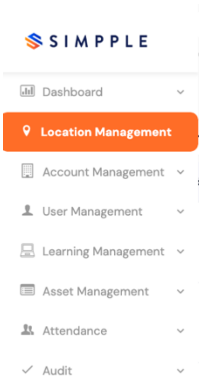
   This is also where the Audit is assigned to the required staff member.



10. Finally, select which type of notification will be required and select *Live* from the status dropdown box.

    Once all settings have been configured click ***Save*** and move on to the Audit Location Assignment.

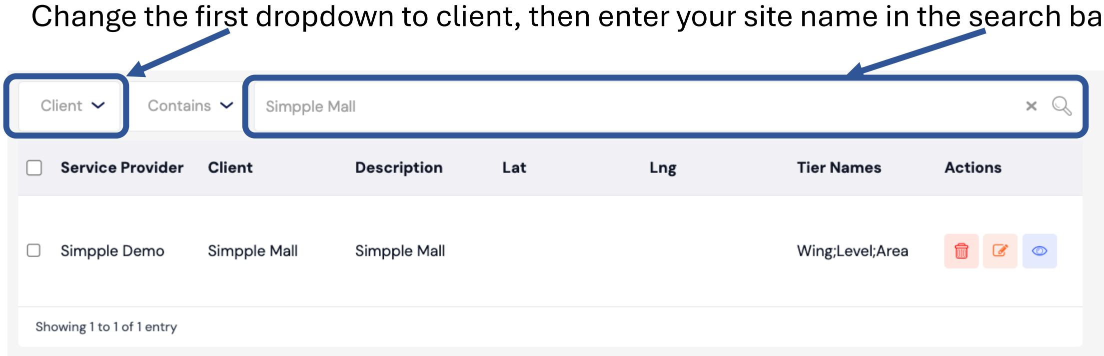
6. Audit Location Assignment



Through the Location Management section, the audit must be assigned to a location on site. Once the location has been allocated, the audit can be scheduled.

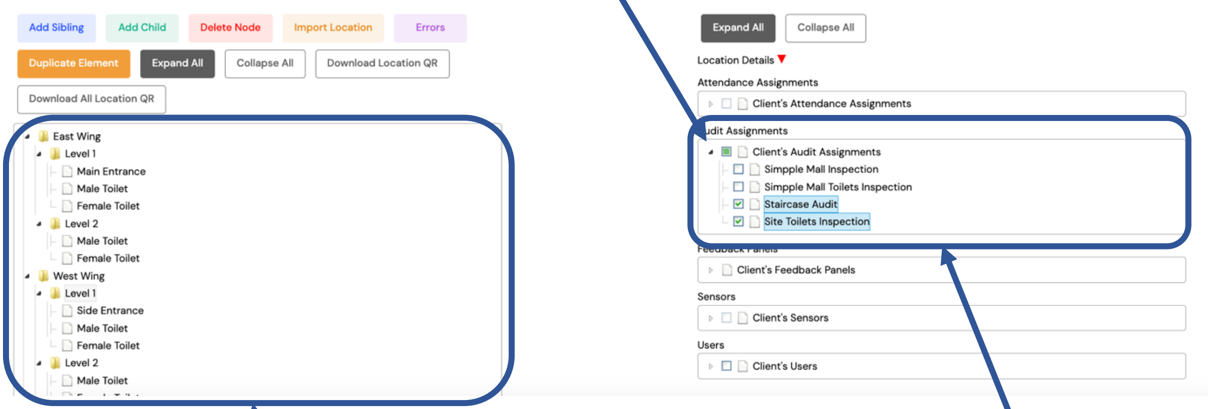
6. Navigate to the *Location Management* section of the Main Sidebar menu.

5. Once in the Location Management section, search for the correct site. Change the first dropdown to client, then enter your site name in the search bar.



4. Select the icon next to the correct site to bring up the edit menu.

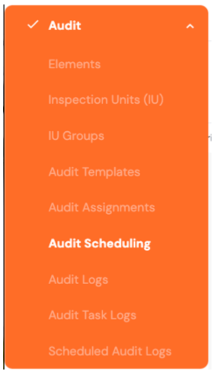
3. Once in the edit menu, use the down arrow to open up the audit assignments for the site.



2. Select Location in the left menu. Once location is highlighted, select the Audit Assignment from the right menu that you want to allocate to that location.

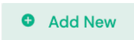
1. Once locations are allocated to the required audit assignments, click ***Save*** and move on to scheduling the audit.

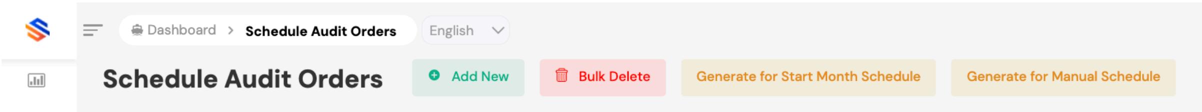
7. Audit Scheduling



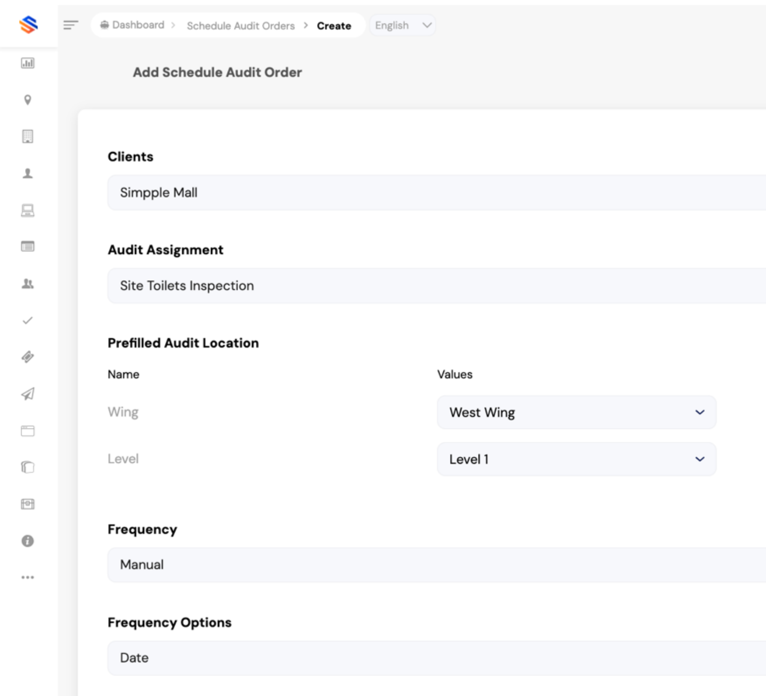
The Audit Scheduling section allows for audit to be generated at certain times or through a manual generation option. This is also where the audit is assigned to specific employees.

1. Navigate to the *Audit Scheduling* section of the *Audit Menu*.

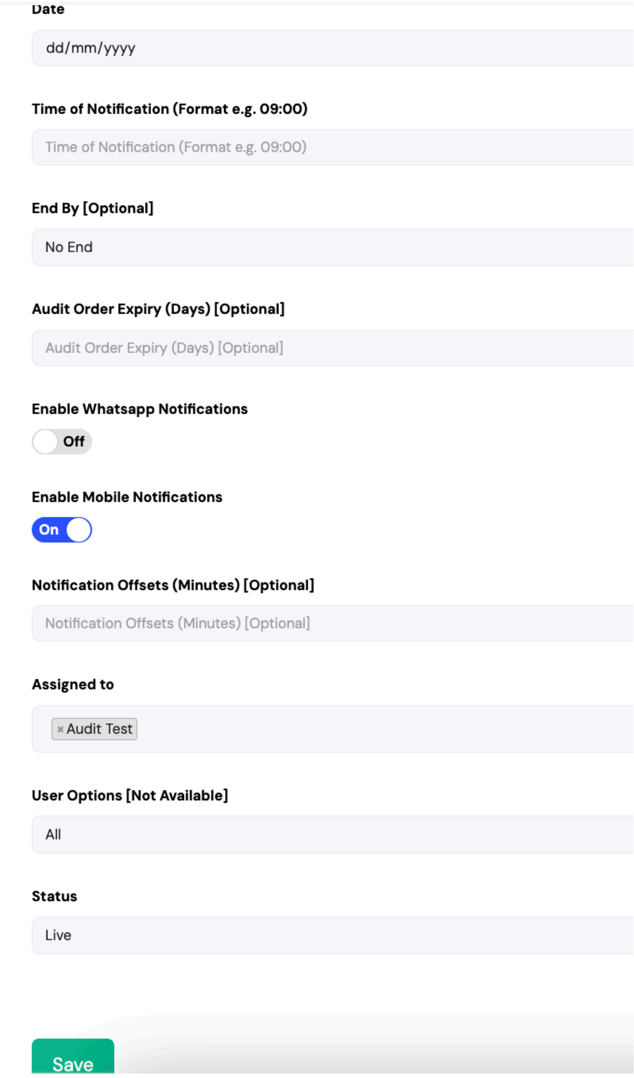
2. Click on the  button at the top of the screen.



4. Select your site from the client dropdown, the audit assignment from the dropdown and the prefilled locations from their respective dropdowns.



3. Select the required frequency for the audit to be repeated.



8. Input the required frequency details. If Manual is selected as the frequency, this section can remain empty.

7. Select your preferred notification type.

6. To finalise the creation of the audit, select who it should be assigned to from the dropdown list. Next, change the status to live.

   Once all settings have been configured, click ***Save*** and generate the audit.

5. If the frequency of the audit is set to Manual or Start Month, the form must be generated manually. To do this, simply select the required audit by clicking on the checkbox on the left side of the row. The click either ***Generate for Start Month Schedule*** or ***Generate for Manual Schedule****,* depending on the previously selected frequency.