EQMS Quick-Start Guide

Audit Manager

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What do you need help with?

- [My Audits list →](#)
- [My Scheduled Audits →](#)
- [Audit Schedule →](#)
- [Audit Details →](#)
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My Audits list

Here you will find a list of Audits that you currently **own**. A variety of filters are available to easily direct you to the information you require.

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Module Access
This dropdown list allows you to navigate easily between EQMS Modules
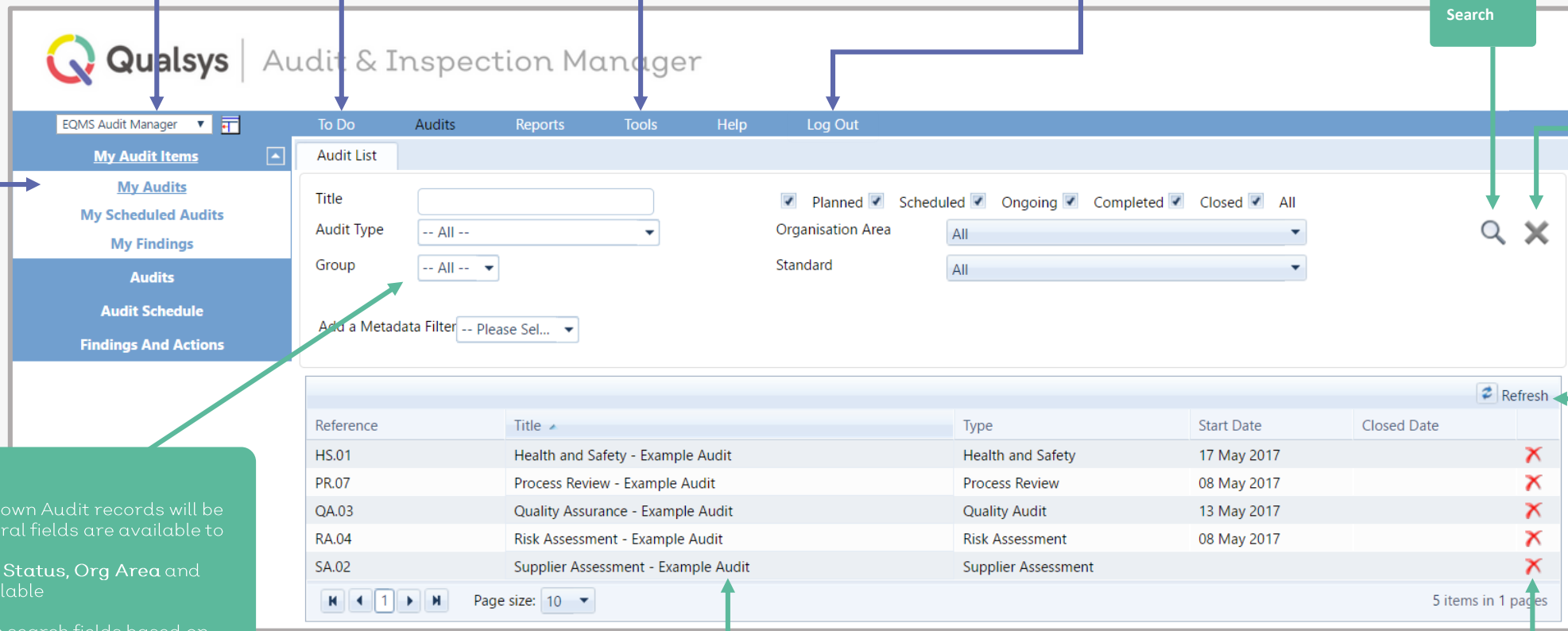
To Do
Access your EQMS To Do List

Tools
Access Access your User Details screen

Log Out
Sign out and exit EQMS

Submit Search

Clear Fields

Audits Navigation
Access different areas of the Audit tab by selecting from the list. **My Audit Items** will expand when first selected to reveal your own Audits, Schedule and Findings. Below this are the standard Audit, Schedule and Findings screens that give module wide data where permitted

Refresh Results

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EQMS Audit Manager ▼

| To Do | Audits | Reports | Tools | Help | Log Out |

Audit List

Title [   ]   ☑ Planned ☑ Scheduled ☑ Ongoing ☑ Completed ☑ Closed ☑ All

Audit Type [-- All -- ▼]   Organisation Area [All ▼]

Group [-- All -- ▼]   Standard [All ▼]

Add a Metadata Filter [-- Please Sel... ▼]

List Filters
As a standard user, your own Audit records will be displayed in the list. Several fields are available to help you filter the results.
Title, Audit Type, Group, Status, Org Area and **Standard** filters are available

Also, you can add custom search fields based on Genera Metadata by selecting from the 'Add a Metadata Filter' list

🔄 Refresh

Reference	Title ▲	Type	Start Date	Closed Date	
HS.01	Health and Safety - Example Audit	Health and Safety	17 May 2017		✗
PR.07	Process Review - Example Audit	Process Review	08 May 2017		✗
QA.03	Quality Assurance - Example Audit	Quality Audit	13 May 2017		✗
RA.04	Risk Assessment - Example Audit	Risk Assessment	08 May 2017		✗
SA.02	Supplier Assessment - Example Audit	Supplier Assessment			✗

|◀ ◀ [1] ▶ ▶| Page size: [10 ▼]   5 items in 1 pages

My Audits List
A list of matching Audit Records which **you currently own** will be displayed. Selecting an Audit from the list will reveal the **Audit Details** screen.

Remove Audits
If an Audit has not yet started, you will see the red delete icon in the row of the Audit. Selecting this icon will remove the record. You will be prompted to confirm this action.

My Scheduled Audits

Here you will find a list of your Audits that are currently Scheduled, organised by Audits Overdue, Scheduled in the next 7 Days, the next month and those scheduled even further on.

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Start Audit
Updates Audit Status to Ongoing

Export Audit as Microsoft Word file

Export Audit as Microsoft Excel File

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EQMS Audit Manager ▼

To Do   Audits   Reports   Tools   Help   Log Out

My Audit Items

My Audits

My Scheduled Audits

My Findings

Audits

Audit Schedule

Findings And Actions

Schedule

Audit Ref	Audit Title	Audit Type	Site	Due to Start			
Overdue ◢							
SA.02	Supplier Assessment - Example Audit	Supplier Assessment		05 May 2017	🏃	🗒	📗
Scheduled within next 7 days ◢							
QA.03	Quality Assurance - Example Audit	Quality Audit		13 May 2017	🏃	🗒	📗
Scheduled within next Month ◢							
HS.01	Health and Safety - Example Audit	Health and Safety		17 May 2017	🏃	🗒	📗
Scheduled Later							
You do not have any scheduled audits in this section.							

My Scheduled Audits List
A list of currently scheduled Audit Records which you are currently **assigned as an Auditor** will be displayed.
Selecting an Audit from the list will reveal the **Audit Details** screen.
Each section **(Overdue, Next 7 Days, Next Month, Later)** can be collapsed or expanded in order to help better organise your view of the schedule.

Audit Schedule

Here you will find a calendar/timeline of Audits that are currently Scheduled. Selecting an Audit will reveal the Audit Details screen.

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Filters
Several fields are available to help you filter the results.
Status, Audit Type, Standards, Org Area, Audit Owner and **From Date** filters are available

Tabs
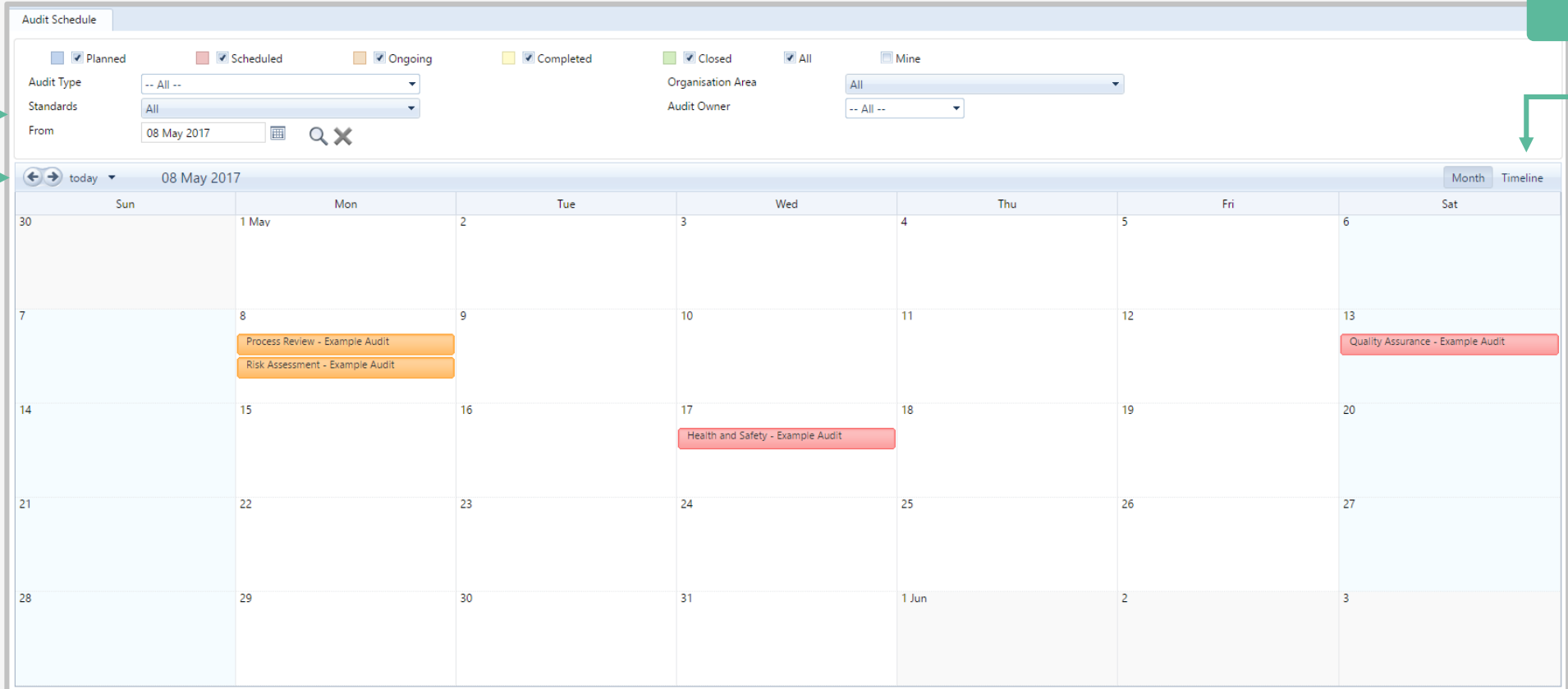When Audits are accessed via the Schedule, they will appear as tabs along this top bar

Swap to Timeline View

Month Selection
Use the arrows to move back and forwards through the calendar by month.

Statuses Key

	Planned
	Scheduled
	Ongoing
	Completed
	Closed

Audit Schedule

☑ Planned   ☑ Scheduled   ☑ Ongoing   ☑ Completed   ☑ Closed   ☑ All   ☐ Mine

Audit Type   -- All --   Organisation Area   All
Standards   All   Audit Owner   -- All --
From   08 May 2017   🔍 ✖

← → today ▾   08 May 2017   Month Timeline

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1 May	2	3	4	5	6
7	8 Process Review - Example Audit Risk Assessment - Example Audit	9	10	11	12	13 Quality Assurance - Example Audit
14	15	16	17 Health and Safety - Example Audit	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1 Jun	2	3

Audit Details

When accessing an Audit Record, you will first be greeted with the Audit Details screen. From here, you can view the Details, Associations, Questionnaire and Findings.

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Audit Details
The main section of this screen will display the Audit Details including the **Type, Owner, Status, Related Dates** and **Scope**

Any areas marked with a red * are mandatory fields and must be filled in.

Associated Items
This tab appears below the details form. You will see any **Organisation Areas, Standards, Documents, Risks** or **Issues** associated with the Audit. Each area will expand to reveal the full list of associated items by selecting the expand icon to the right of the header.

Auditors and Viewers
This tab will allow you to view the Audit Team (users involved with the Audit Process) and Audit Viewers (users with read only access)

Audit Scores
This tab will allow you to view the results from the Audit including the amount of Non Conformances raised

Questionnaire Tab
Select this tab to access the Audit Checklist(s)

Findings Tab
Select this tab to access any Findings that may have been raised in relation to th s Audit

Export
Audits can be exported as both Word and Excel files

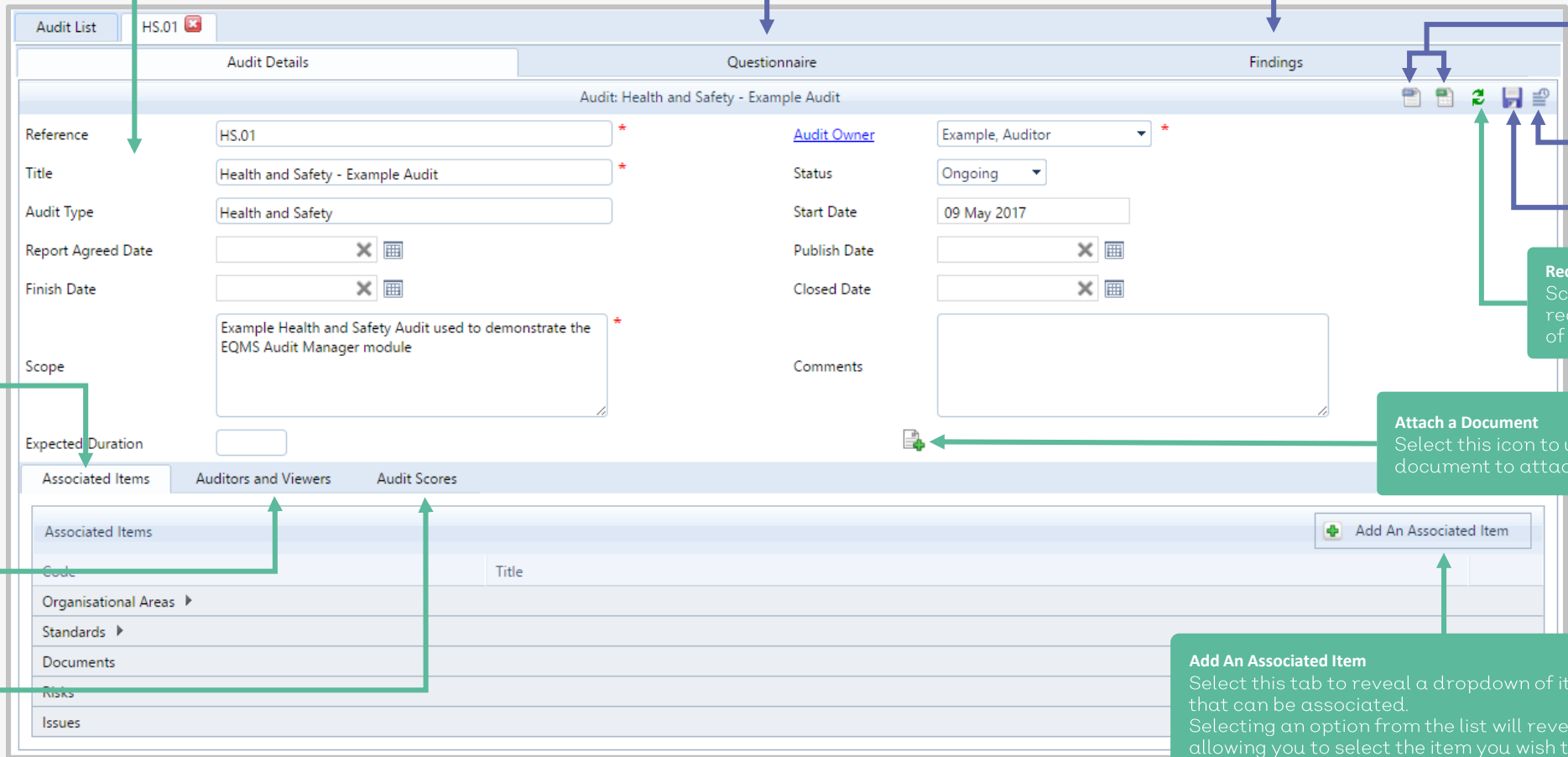**Audit Trail**

Save

Recurring Audit
Schedule a recurrent version of this Audit

Attach a Document
Select this icon to upload a new document to attach to the Audit
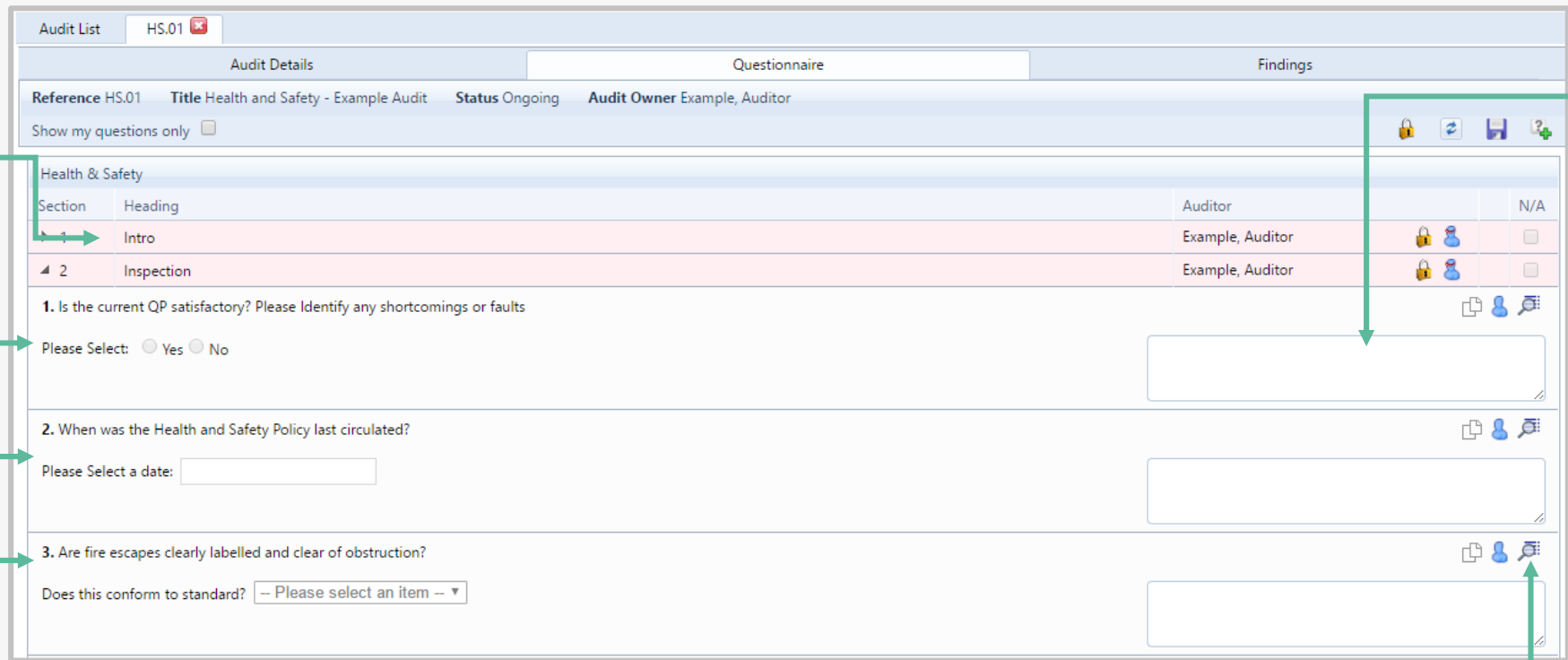
Add An Associated Item
Select this tab to reveal a dropdown of item types that can be associated.
Selecting an option from the list will reveal a window allowing you to select the item you wish to associate.
Permissions apply

Audit screen

Audit List	HS.01 ⊠	
Audit Details	Questionnaire	Findings

Audit: Health and Safety - Example Audit

Reference	HS.01	*	Audit Owner	Example, Auditor	*
Title	Health and Safety - Example Audit	*	Status	Ongoing	
Audit Type	Health and Safety		Start Date	09 May 2017	
Report Agreed Date			Publish Date		
Finish Date			Closed Date		
Scope	Example Health and Safety Audit used to demonstrate the EQMS Audit Manager module	*	Comments		
Expected Duration					

Associated Items	Auditors and Viewers	Audit Scores

Associated Items — Add An Associated Item

| Code	Title
Organisational Areas ▸	
Standards ▸	
Documents	
Risks	
Issues	

Audit Questionnaire

The questionnaire shows the Checklist(s) associated with the Audit. (The example show is a Questionnaire that has been released to Auditors but has not yet been checked-out).

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Section Headers
Each checklist may be split into multiple sections. Each section can be collapsed or expanded to reveal the questions within

Audit List	HS.01 ⊠		
Audit Details	Questionnaire		Findings

Reference HS.01 **Title** Health and Safety - Example Audit **Status** Ongoing **Audit Owner** Example, Auditor

Show my questions only ☐

Health & Safety

Section	Heading	Auditor		N/A
1	Intro	Example, Auditor	🔒👤	☐
2	Inspection	Example, Auditor	🔒👤	☐

1. Is the current QP satisfactory? Please Identify any shortcomings or faults

Please Select: ○ Yes ○ No

2. When was the Health and Safety Policy last circulated?

Please Select a date: [   ]

3. Are fire escapes clearly labelled and clear of obstruction?

Does this conform to standard? -- Please select an item -- ▼

Comments Field
Each question in a checklist comes with a comment field as default. Depending on the configuration, you may find that the field is mandatory

Icons

Icon	Label
🔒	Check-Out
🔓	Check-In
🔄	Refresh Records
💾	Save Record
?➕	Associate Question
🗐	Show associated Info
👤	Add Auditee
🔍	Show Finding(s)
🔍➕	Raise Finding
📈	Release to Audit Team
✅	Validate Questionnaire

Answers
To begin to fill in the question responses, you must first **check-out** your checklists. Once checked out, you will be free to answer your questions. The answers will vary depending on the metadata type used. These can be **date, dropdown, text field, integer(numberic) field** or **radio buttons**

Findings
To raise and action a finding, select the **Raise Finding** icon .

Throughout the process of an Audit you may need to raise findings. Often, you may find that the answers to the question may automatically trigger a non-conformance or observation based on the answers 'weight'

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