Creating an Audit Work Order Introduction

💾 Wed, Jan 17, 2024 🛛 🖿 Creating an Audit Work Order

An Audit is a Type of Work Order that is used to gather details using RFIs about the status of a Building or other areas.

To create an Audit Work Order, click the "Create Audit" button and follow the steps below. **Note:** You must have an Audit RFI and Audit Reasons created before an Audit Work Order can be created. Please see Creating an Questionnaire and Reasons for help on these.

1. The first step is to select the Client that will be used. For information on how to do this, see the Client Selection page. This will only appear if there are multiple Clients to select from. If there is only one then that Client is selected automatically.

2. The Audit Work Order screen appears after selecting a Client.

udit New Item							
Audit Pending							
Building Click here	to make a selection	Re	ason Please select		*		
RFI: No RFI selected	Select Building						
Name	Select Building				All Select All Filter Clear All Filter		
Filter	Select Building						
	Building Known As	Building Known As Building N° Building Name Bui					
	Filter	Filter	Filter	Filt	Filter		
	Birchen House (\$0702)	S0702	Birchen House (S0702)	Ter			
	Boundary House (S0145)	S0145	Boundary House (S0145)	Ter			
	Bridgeman House (S0724)	S0724	Bridgeman House (\$0724)	Ter			
	Capstan House (\$1010)	S1010	Capstan House (\$1010)	Bra			
	Castle House (S0703)	\$0703	Castle House (S0703)	Bra			
	Cater House (S0473)	S0473	Cater House (S0473)				
	Charter House (S0704)	S0704	Charter House (\$0704)	Bra Ter			
	Chaucer House (\$0837)	S0837	Chaucer House (S0837)	Ter			
	Cheviot House (S0658)	S0658	Cheviot House (\$0658)	Bra			
	Clarendon House (S0891)	S0891	Clarendon House (S0891)	Ter			
	Crewe House (S0712)	S0712	Crewe House (S0712)	Ter			
	Crown Building (S0910)	S0910	Crown Building (S0910)	Bra 👻			
	< III 376 available items			F			
	570 available items						
			OK	Cancel			
Notes)'		
votes							

3. Select a Building by either double clicking or by highlighting a Building and clicking OK.

This will then enable the Reason field.

4. Select an Audit Reason by clicking the Reason drop down and choosing the reason from the list. Once chosen, this will then enable the RFI and Location sections.

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5. Choose the RFI and the tick the locations where the RFI is applicable. The RFI selected is shown in the RFI header. If the location of the Audit is in a Whole Area, on a Whole Level or is Unspecified then this can be chosen from the Location Type drop down and will update the Locations accordingly.

RFI: Health and Safety Inspection			Location Type Specific						
Name	Description		114 available locations, 114 filtered locations, 0 selecte Select All Clear All Select All Filter Clear All Filter						
Filter	Filter			Level 1	Level 2	Level 3			
Fire Risk Assessment	RFI for Fire Risk Assessments			Filter	Filter	Filter			
Health and Safety Inspection	RFI for H&S Inspections			01st Floor	Back of House	Cleaners Cupboard			
				01st Floor	Back of House	Corridor			
				01st Floor	Back of House	Interview Room			
				01st Floor	Back of House	Kitchen			
				01st Floor	Back of House	Managers Office			
				01st Floor	Back of House	Offices			
				01st Floor	Back of House	Plant Room			
				01st Floor	Back of House	Staff Room			
				01st Floor	Back of House	Stairwell			
				01st Floor	Back of House	Stationery Cupboard			
				01st Floor	Back of House	Store Room			
				01st Floor	Back of House	Toilets - Female			
				01st Floor	Back of House	Toilets - Less-abled			
				01st Floor	Back of House	Toilets - Male			
				01st Floor	Back of House	Toilets - Shared			
				01st Floor	Customer Area	Interview Room			
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6. If there are any notes relevant to the job that need to be entered, these can be entered in the Notes field. Once all data has been selected, click Save to create the Audit.

Allocating Resource and Setting the Schedule for Attendance - Audit

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