



Creating an Audit Work Order

Introduction

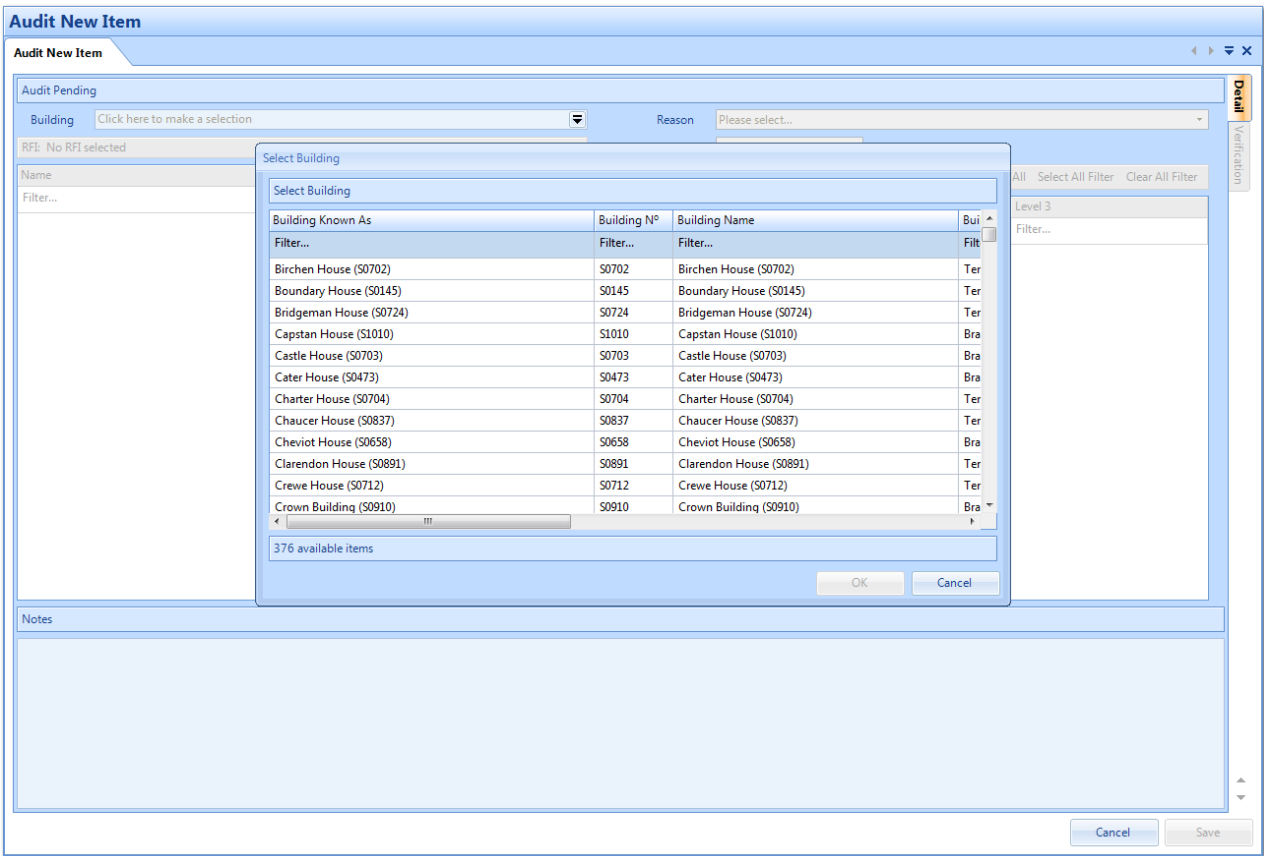
 Wed, Jan 17, 2024

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



The screenshot shows the 'Audit New Item' window. The 'Building' dropdown is set to 'Click here to make a selection'. The 'Reason' dropdown is set to 'Please select...'. A 'Select Building' dialog box is open, displaying a table of buildings. The table has columns: Building Known As, Building N°, Building Name, and Bui. The table lists 15 buildings, including Birchen House (S0702), Boundary House (S0145), Bridgeman House (S0724), Capstan House (S1010), Castle House (S0703), Cater House (S0473), Charter House (S0704), Chaucer House (S0837), Cheviot House (S0658), Clarendon House (S0891), Crewe House (S0712), and Crown Building (S0910). The dialog box also shows '376 available items' and 'OK' and 'Cancel' buttons.

Building Known As	Building N°	Building Name	Bui
Birchen House (S0702)	S0702	Birchen House (S0702)	Ter
Boundary House (S0145)	S0145	Boundary House (S0145)	Ter
Bridgeman House (S0724)	S0724	Bridgeman House (S0724)	Ter
Capstan House (S1010)	S1010	Capstan House (S1010)	Bra
Castle House (S0703)	S0703	Castle House (S0703)	Bra
Cater House (S0473)	S0473	Cater House (S0473)	Bra
Charter House (S0704)	S0704	Charter House (S0704)	Ter
Chaucer House (S0837)	S0837	Chaucer House (S0837)	Ter
Cheviot House (S0658)	S0658	Cheviot House (S0658)	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

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.

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 selected... 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			
Health and Safety Inspection	RFI for H&S Inspections			
		Filter...	Filter...	Filter...
		<input type="checkbox"/> 01st Floor	Back of House	Cleaners Cupboard
		<input type="checkbox"/> 01st Floor	Back of House	Corridor
		<input type="checkbox"/> 01st Floor	Back of House	Interview Room
		<input type="checkbox"/> 01st Floor	Back of House	Kitchen
		<input type="checkbox"/> 01st Floor	Back of House	Managers Office
		<input type="checkbox"/> 01st Floor	Back of House	Offices
		<input type="checkbox"/> 01st Floor	Back of House	Plant Room
		<input type="checkbox"/> 01st Floor	Back of House	Staff Room
		<input type="checkbox"/> 01st Floor	Back of House	Stairwell
		<input type="checkbox"/> 01st Floor	Back of House	Stationery Cupboard
		<input type="checkbox"/> 01st Floor	Back of House	Store Room
		<input type="checkbox"/> 01st Floor	Back of House	Toilets - Female
		<input type="checkbox"/> 01st Floor	Back of House	Toilets - Less-abled
		<input type="checkbox"/> 01st Floor	Back of House	Toilets - Male
		<input type="checkbox"/> 01st Floor	Back of House	Toilets - Shared
		<input type="checkbox"/> 01st Floor	Customer Area	Interview Room

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

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=252>