

Desktop Audits

📅 Thu, Jan 18, 2024 📁 Audits

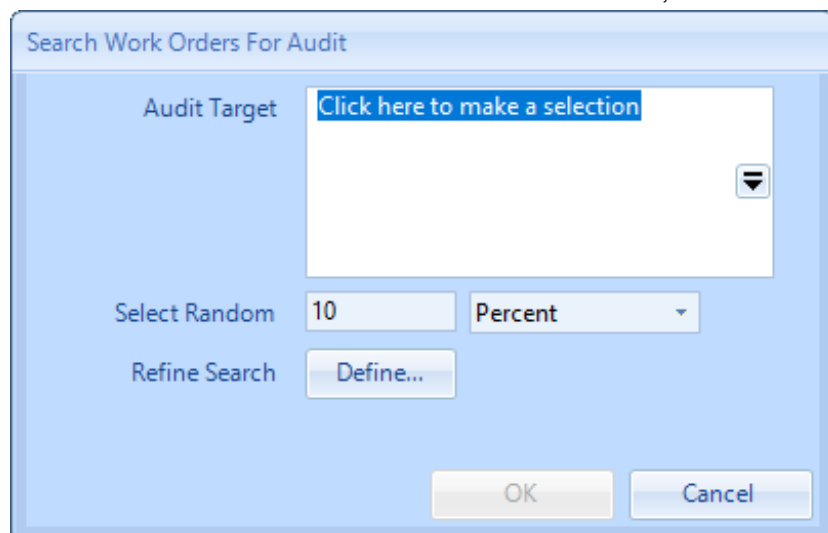
Within the Audits module is a section called Desktop Audits. Desktop Audits are used as a way to allow Clients to systematically choose random subsets of data to perform manual audits on the data integrity entered by others. There are three kind of Desktop Audits possible:

1. Work Order - this is used to audit the Work Order itself
2. Invoice - this is used to audit the Invoice on the Work Order
3. Certificate - this is used to audit the Certificate added against the Work Order

The Desktop Audit function is split into three sections:

Select Work Orders for Audit

The "Select Work Orders for Audit" action allows the User to determine how many and what Work Orders will be marked for Audit. The first thing that is required is for the User to choose the Audit Target. The Audit Target shows a list of available Desktop Audit Questionnaires to choose from to determine the type of data to return. The "Select Random" field is used to determine the percentage or number of Work Orders that will be shown to be marked for Audit. This is used to bring back random results. The "Refine Search" button is used if the User specific Work Order criteria they wish to search for and to mark for Audit. Once the criteria is set, click "OK" to bring back a list of results.



The screenshot shows a dialog box titled "Search Work Orders For Audit". It has a light blue background. On the left, there are three labels: "Audit Target", "Select Random", and "Refine Search". To the right of "Audit Target" is a large white rectangular area with a blue border and a small downward arrow icon in the bottom right corner. Above this area is a blue button with white text that says "Click here to make a selection". To the right of "Select Random" is a text input field containing the number "10" and a dropdown menu currently showing "Percent". To the right of "Refine Search" is a button with the text "Define...". At the bottom of the dialog box are two buttons: "OK" and "Cancel".

List Work Orders Marked for Audit

The "List Work Orders Marked for Audit" action brings back a list of all Work Orders in the system that have been marked for Audit. The list brought back displays typical Work Order details, such as the WO Number and Building, but it also shows some extra columns referring to being marked for Audit. The Audit Type(s) column shows the type of Audit this Work Order has been marked with and the Marked By column shows who marked the WO for Audit.

| Work Order N° | Type of Work Order | Building | Building N° | Equipment/Service Type | Status | Status Description | Completed Date | Audit Type(s) | Marked By ▼ |
|---------------|--------------------|----------------------------|-------------|-------------------------------|-----------|---------------------------|------------------|---------------|---------------|
| Filter... | Filter... | Filter... | Filter... | Filter... | Filter... | Filter... | Filter... | Filter... | Filter... |
| 3274367 | Reactive | Honiton | 1158 | Gas Commercial Hot Water B... | 5.01 | Job completed - in inv... | 24/04/2020 17:40 | Work Order | Ostara System |
| 3273608 | Reactive | Nottingham Castle Marina | 0438 | Fire Extinguisher | 5.01 | Job completed - in inv... | 22/04/2020 10:49 | Work Order | Ostara System |
| 3273580 | Reactive | Manchester (Piccadilly) | 1031 | Fire Extinguisher | 5.01 | Job completed - in inv... | 27/04/2020 20:47 | Work Order | Ostara System |
| 3272473 | Reactive | Exeter Central (St Davids) | 0198 | Fire Extinguisher | 5.01 | Job completed - in inv... | 27/04/2020 15:34 | Work Order | Ostara System |
| 3272135 | Reactive | Leicester Fosse Park | 0307 | Fire Alarm System Panel | 5.01 | Job completed - in inv... | 29/04/2020 19:03 | Work Order | Ostara System |
| 3271859 | Reactive | London Harrow | 0345 | Fire Extinguisher | 5.01 | Job completed - in inv... | 29/04/2020 22:07 | Work Order | Ostara System |
| 3271527 | Reactive | Wigan Town Centre | 1090 | Gas Commercial Hot Water B... | 5.01 | Job completed - in inv... | 27/04/2020 22:26 | Work Order | Ostara System |
| 3270485 | Reactive | Exmouth Seafront | 1117 | Fire Extinguisher | 5.01 | Job completed - in inv... | 27/04/2020 12:49 | Work Order | Ostara System |
| 3235503 | Reactive | Whitehaven | 0604 | Fixed Wiring | 5.01 | Job completed - in inv... | 23/04/2020 07:02 | Work Order | Ostara System |

List My Work Orders Pending Audit

The "List My Work Orders Pending Audit" action brings back a list of all Work Orders that are pending audit by the logged in User. All Work Orders brought back in this list will only be Work Orders that the is required to Audit. The list shows the same detail as the "List Work Orders Marked for Audit" list.

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=681>