

USER APP Manual

Audit⁺Recordit

AuditRecordit User App Contents

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1. Introduction to the AuditRecordit System

AuditRecordit (AR) is a powerful, flexible cloud-based solution that enables an organisation to audit or survey individuals, projects and assets. With AR you can reliably meet regulatory, legal and compliance requirements. Additionally, AR allows you to achieve and maintain high performance standards across a range of activities with the inevitable result of increasing business efficiencies.

How does it work? Through a simple yet consistent means of enabling Users to collect and record pertinent data electronically. That data is then used to drive a series of automated processes that inform and where necessary **alert** both internal and external colleagues. The key to the popularity of the AuditRecordit system is the simple to use interface that enables a logical flow to focused, collaborative work processes.

A super easy-to-use User App facilitates the collection of data through carefully designed audits and surveys focused on a range of business areas. For example, collection of data in respect of Health and Safety 'Accident and Incident Reports', auditing of individuals for compliance with road safety legislation, providing simple yet impactful employee surveys across a range of topics. To name but a few.

Each entry by a User is auto checked and where necessary guidance and alerts are offered as appropriate. Audits having been completed, Users are invited to follow proven work processes by managing **alerts** through to "resolved" for consistent and measurable outcomes.

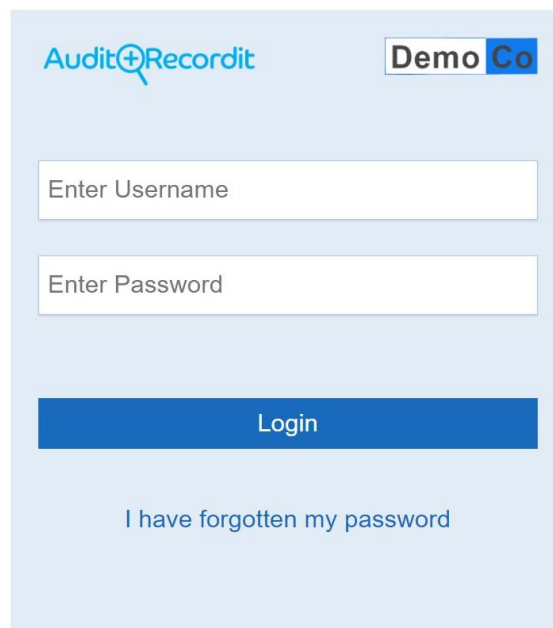
A powerful Admin App brings together data collected through the User App, giving access to a range of tools to quickly identify non-compliance, failures, poor or reducing performance and actively manage the work processes and communications necessary to achieve the relevant remediations or improvements towards reliably high-performance rates.

2. Login to the AuditRecordit User App

Users access the User App to complete **audits** (including reports, questionnaires, surveys, training modules etc).

The User App can be accessed at a URL specific to your organisation similar in structure to this demo URL:

<https://auditrecordit.com/DemoCo/user/console.php>



The screenshot shows the login interface for the AuditRecordit User App. At the top left is the AuditRecordit logo, and at the top right is the text 'Demo Co'. Below the logo are two input fields: 'Enter Username' and 'Enter Password'. A blue 'Login' button is positioned below the password field. At the bottom of the form, there is a link that reads 'I have forgotten my password'.

1. Enter your Username which will be your email or unique Username emailed to you or given to you by your manager.
2. Enter your Password, you will have received by email.
3. Should you have forgotten your Password, enter your email in the Username field, choose the link at the bottom of the screen and follow the instructions.

3. Create a new Audit

Once logged in to AR, if you have been invited to complete only one audit, it will begin immediately. Otherwise, you will see either of the two screens below. If you have access to only one Audit type you will see the blue “NEW” button, select this and a newly created audit will appear.

AQR Accident Incident Report Form Jenny ▾

NEW

Advanced..



OR

If you have access to more than one type of audit, choose the drop-down box arrow next to “New:” and select the audit you require. This will create a new audit.

AQR Accident Incident Report Form Jenny ▾

Completed Instances

New: ▾

Advanced..



4. Beginning an Audit

Your newly created audit is ready to be completed. Choose “BEGIN” and you will be taken to the audit, now simply respond to the questions or statements as they appear using next to move forward and previous to go back.

To view previously completed audits select “Completed Instances” check box

The screenshot shows the Audit+Recordit interface. At the top left is the AQR logo and the text "Accident Incident Report Form (2022-02-04_J_McClements_002)". To the right is a dropdown menu showing "Jenny". Below this is a table with columns "Audit Name", "Instance Name", and "Completed". The table contains one row: "Accident Incident Report Form (v3)", "2022-02-04_J_McClements_002", and a "Completed" column containing "BEGIN" and "DELETE" buttons. The "BEGIN" button is circled in red. Below the table are three checkboxes: "Completed Instances", "Advanced..", and "Show Expired and Forthcoming Audits". At the bottom left is a "NEW" button. At the bottom right is a "Demo Co" logo.

Deleting an Audit not yet begun

Should you create an audit that you do not wish to fill out for any reason, simply “DELETE” it using this button. Please note, if you have already begun an audit, it will no longer be capable of being deleted.

Resume or View an audit

When an audit has been begun you can at anytime choose to “SAVE DRAFT” or simply exit the User App and a draft of content to date will be saved. When you return to the App, you will be offered the opportunity to “RESUME”. Alternatively, if finished completely, you will be offered the opportunity to “VIEW” the completed audit.

5. Alert Types

Throughout the audit, subject to your responses, a number of alerts may be triggered. These alerts have varying levels of importance, and are listed below in order from least consequential to most.

- INFORMATION (providing you with helpful information)
- FOLLOW UP (advising further action)
- PROMPT ACTION or STOP (prompting urgent action)

Resolve Alerts.

Certain audits are designed to allow the User to 'RESOLVE' their own alerts and it is important to do so as soon as the necessary action is complete.

To view and actively resolve alerts, choose "RESOLVE" next the relevant audit which opens the Alerts List View.

Accident Incident Report Form
(2022-02-04_J_McClements_001)

Jenny ▼

| Audit Name | Instance Name | Completed | VIEW | RESOLVE |
|------------------------------------|-----------------------------|------------------|----------------------|-------------------------|
| Accident Incident Report Form (v3) | 2022-02-04_J_McClements_001 | 04/02/2022 22:52 | VIEW | RESOLVE |

Completed Instances


[NEW](#)

Advanced..

Demo Co

6. Alerts List View

Below two alerts can be seen that require to be resolved (Status is “Open”). To “Close” an alert, firstly ensure that any action that the alert advises has been completed. Secondly, ensure any documentation to support the completion of the action is available to append to the alert. Finally, select anywhere in the Alert Detail Line to open it.


Accident Incident Report Form
(2022-02-04_J_McClements_002)
Jenny

| RESPONSE | NOTES | FILES | STATUS |
|--|-------|-------|--------|
| Has the incident resulted in any damage to plant, property or equipment? | | | |
| Yes | 0 | 0 | Open |
| Does the accident require further investigation? | | | |
| No | 0 | 0 | Open |

[DONE](#)



Resolve Alerts.

Selecting an alert opens the Alert Edit View. Here simply add a note, add a file or sign off. Add as many notes or files as required to support progress towards resolving the alert. If the alert is not yet resolved simple choose “CLOSE”. Only choose “SIGN OFF” when the alert has been fully resolved which sets the status of the alert to “Closed”.

Does the accident require further investigation?

| | | | |
|----|---|---|------|
| No | 0 | 0 | Open |
|----|---|---|------|

[ADD A NOTE](#)
[ADD A FILE](#)

[SIGN OFF](#)
[CLOSE](#)

7. Re-open Resolved Alerts

Once all alerts have been resolved, the “RESOLVE” button becomes shaded and reads “RESOLVED”. Should you require to reopen an alert, selecting “RESOLVED” will permit re-entry to the Alerts List View.

| Audit Name | Instance Name | Completed | |
|------------------------------------|-----------------------------|------------------|---|
| Accident Incident Report Form (v3) | 2022-02-04_J_McClements_001 | 04/02/2022 22:55 | <input type="button" value="VIEW"/> <input type="button" value="RESOLVED"/> |
| Accident Incident Report Form (v3) | 2022-02-04_J_McClements_002 | | <input type="button" value="BEGIN"/> <input type="button" value="DELETE"/> |

Selecting the Alert Detail Line will once again show the Alert Edit View and the REOPEN button will set the status of the alert to OPEN once again. This can be useful for adding unexpected notes and files later.

Yes
3
0
Closed

| NOTE/FILE | ADDED | BY |
|-----------------------------|---------------------|-------------------|
| Signed off 2022-02-04 23:34 | 2022-02-04 23:34:09 | McClements, Jenny |
| Reopened 2022-02-04 23:43 | 2022-02-04 23:43:49 | McClements, Jenny |
| Signed off 2022-02-04 23:52 | 2022-02-04 23:52:02 | McClements, Jenny |

8. Adding Additional Files

Whilst notes and files can be added to the relevant alerts associated with **completed** Audits, selecting the “ADD FILES” button (optional feature, not available to all audits) in the Alerts Listing View allows for the uploading of any generic additional files to the completed audit.

AGR Accident Incident Report Form (2021-11-24_J_Toland_006) James ▾

| RESPONSE | NOTES | FILES | STATUS |
|--|-------|-------|--------|
| Has the incident resulted in any damage to plant, property or equipment? | | | |
| Yes | 0 | 0 | Open |
| Does the accident require further investigation? | | | |
| No | 0 | 0 | Open |

ADD FILES
DONE

“ADD FILES” creates a free Alert. Select anywhere in the Alert Detail Line to open the Alert Edit View.

Is there any post-sign-off documentation?

| | | | |
|-----|---|---|------|
| Yes | 0 | 0 | Open |
|-----|---|---|------|

Select “ADD A NOTE” and/or “ADD A FILE” as required. To finish, select either “Close” if wish to return at later date or “Sign Off” to reflect no further notes or files to add.

| | | | |
|-----|---|---|------|
| Yes | 0 | 0 | Open |
|-----|---|---|------|

ADD A NOTE ADD A FILE

SIGN OFF CLOSE