

E>nable Audit

# How to allocate an audit

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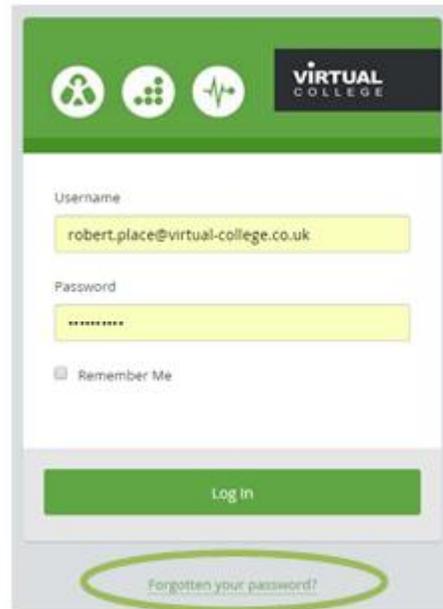
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## Getting started

You will have already had your log in details emailed to you when you were set up on the system.

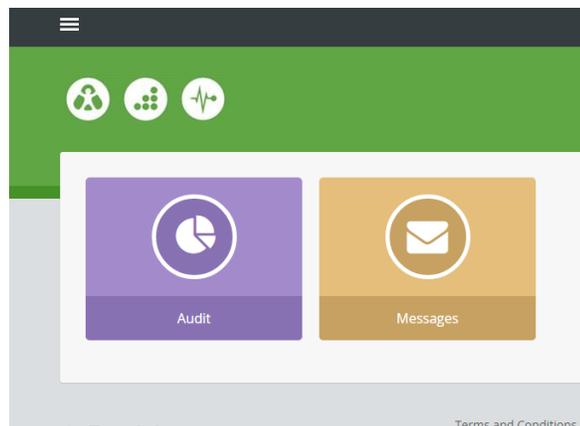
If you have forgotten your password please use the 'forgotten your password?' link at the bottom of the welcome page.



## Welcome to your Audit

### Dashboard

You are automatically taken to the 'dashboard' which will allow you to complete any audits you have to do.



To start allocating an audit we need to switch our view from 'User' to 'Admin' (an administrator)

This is done by selecting this symbol in the top left hand corner of the screen.

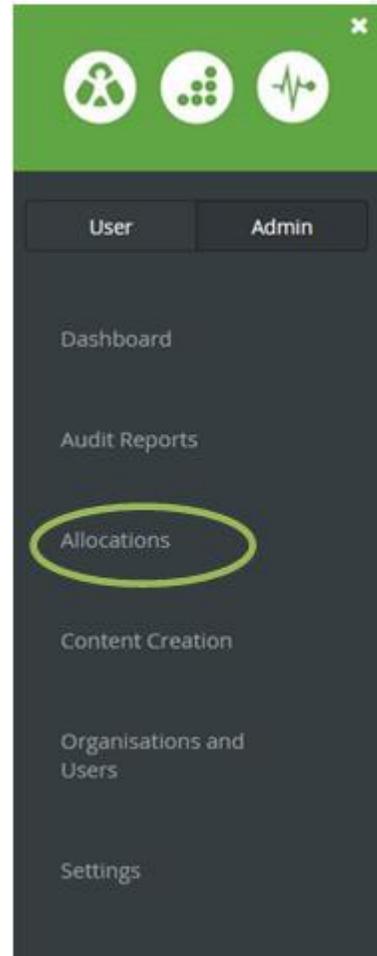


Once you have selected the menu icon you will see this side menu.

Here you can navigate yourself around the whole audit system.

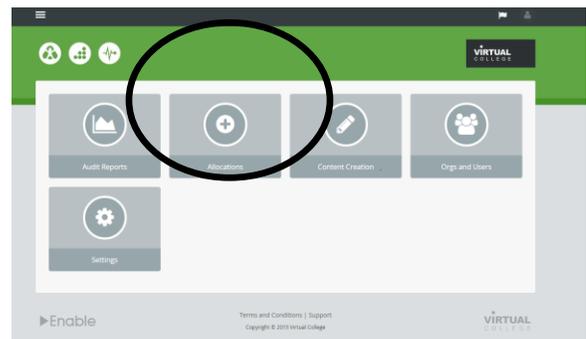
To start allocating an audit, please select the 'admin' tab and select 'Dashboard' to go to the administration page.

Here you can select 'allocations'.



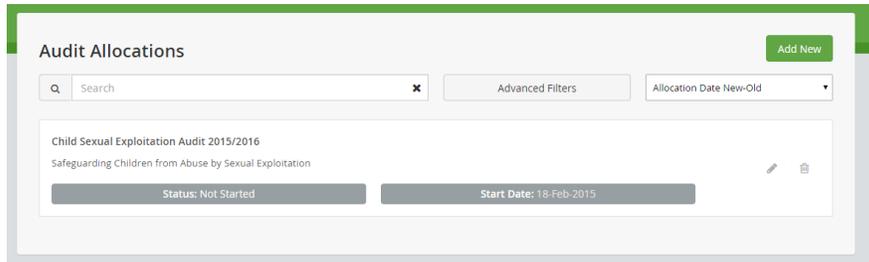
You also have the option of 'dashboard' which will show the various administration options laid out in a tile format:

From this view please select the 'allocations' icon, highlighted in the picture.

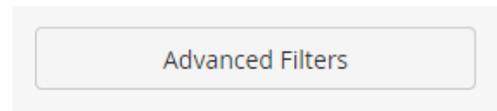


## Viewing previous allocations

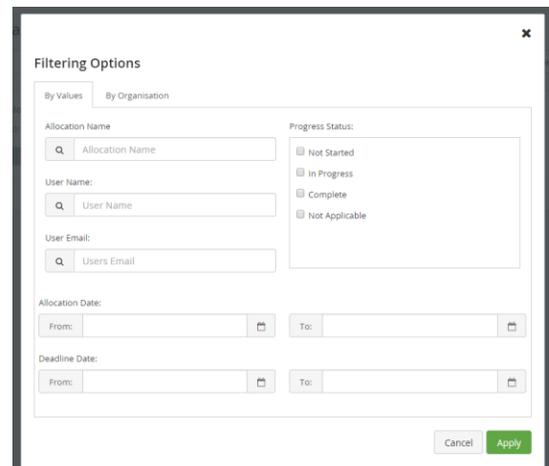
Here you will see a list of audits you have allocated to organisations or individuals



Should you have many allocations and you wish to search through them or filter by certain parameters please selected the 'Advanced Filters' icon.

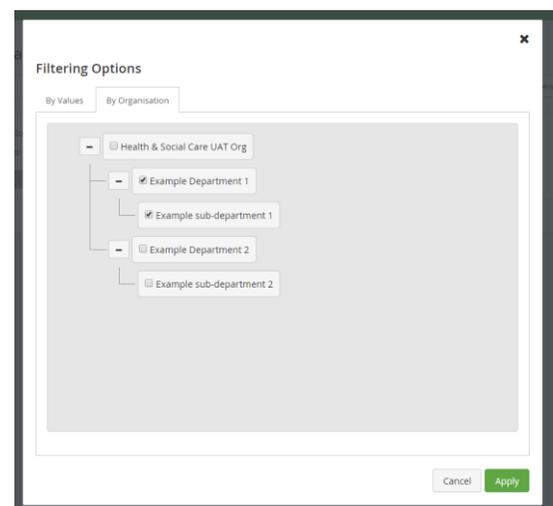


Here you can filter by Values. For example 'I wish to view all the Safeguarding audits which have yet to be started or are still in progression'. For this I would search under Allocation Name for Safeguarding and tick the 'Not Started' and 'In progress' boxes and select Apply.



Here you can also filter by Organisation. To do so select the 'By Organisation' tab and select organisations by using the tick boxes.

Selecting the tick box on a department will automatically select all the sub-departments underneath in the structure.



To view one of your allocated audits simply click on the audit once you have filtered and searched for the audit you wish to view. Selecting anywhere on the allocation will take you into the audit in question.



Using the edit icon  you can change certain elements of the allocation such as:

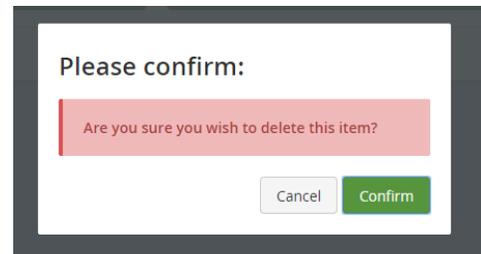
Name

Start/End date

Organisations/Users completing the audit

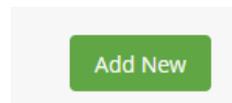
The audit topic

Using the delete icon  you can remove the allocation – you will be warned after selecting this icon to make sure you do not delete in error.



## Allocating a new audit

Select 'Add new' at the top right hand of the screen:



This part is broken down into 4 tabs; Details, Organisations, Audit and Users.

## 1. Details

Here you can enter the outlining details of your audit allocation.

### Allocation Name

Please give a name to your allocation.

Please be as descriptive here as possible as this will prove very useful in the long term.

For example. 'Funding audit 2014/2015'

### Start Date

This is the date in which the audit can start. This is not compulsory and if left blank the audit will start straight away.

If a date is enter then a User will not have access to the audit until this date.

### Deadline Date

This is the date the audit will lock down. The lock down occurs at 00.00 of this date. This is not compulsory and if left blank the audit will remain open.

Deadlines can be extended or removed at a later date but not once the date has been met.

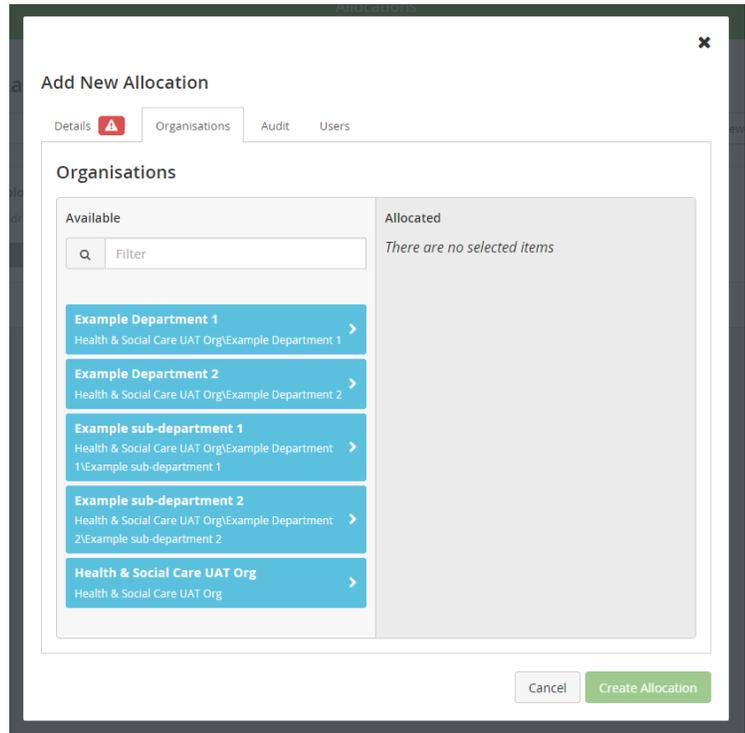
## 2. Organisations

Here you can choose which organisations receive this allocation.

Please remember that this is a single audit therefore if multiple organisations are assigned to this allocation they will be completing one singular audit.

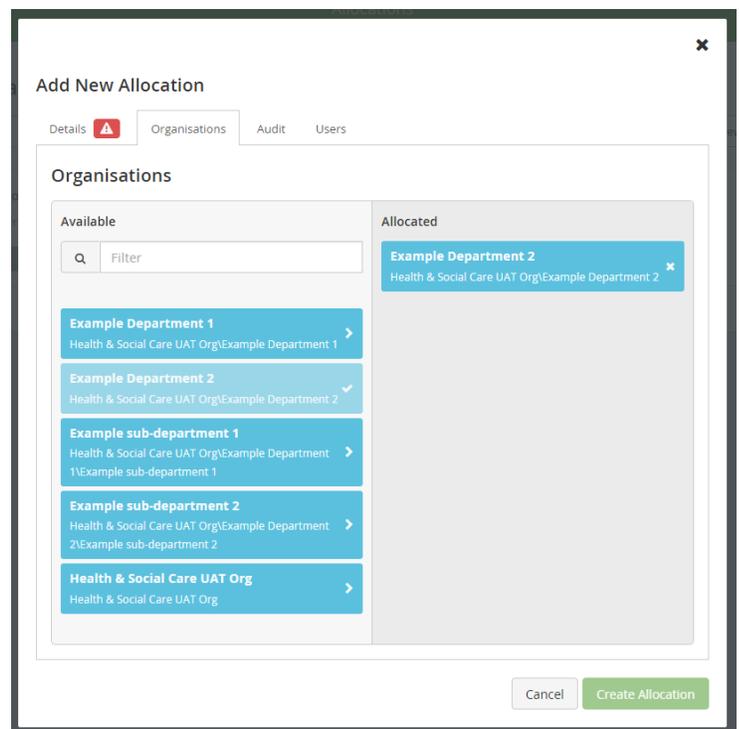
If you are wanting to gather individual responses from multiple organisation this represents multiple allocations. I.E. each organisation will require an individual audit allocated to them

To allocate an audit simply click on the blue box housing the name of the organisation.



Using the filter search you will be able to search for the organisation you require. Once selected the organisation will be listed on the right hand of the screen.

If you have select an organisation in mistake icmply select the  icon to remove this from the list.

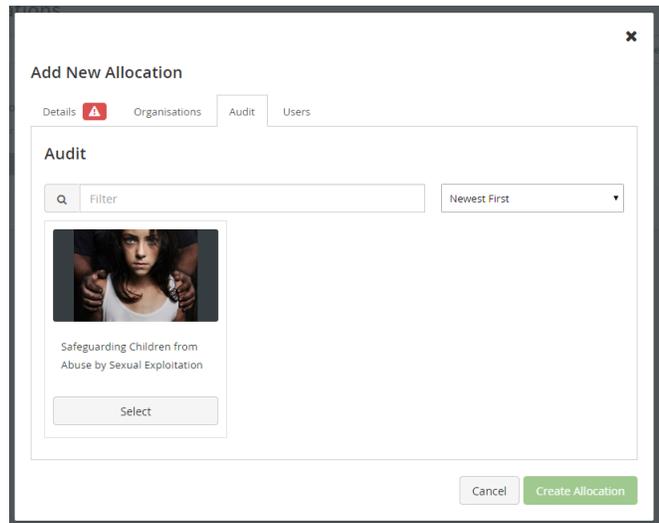


### 3. Audit

Here you can select the audit you wish to allocate to the organisations/users.

\*Only published audits will show in this list.

If you have multiple audits in your system you can use the filter function to search for a particular audit.



### 4. Users

Here you can select the Users which will be able to complete the Audit.

Click on their name to select them. Once you have done this select the 'Role' they will have.

These are the following roles available:

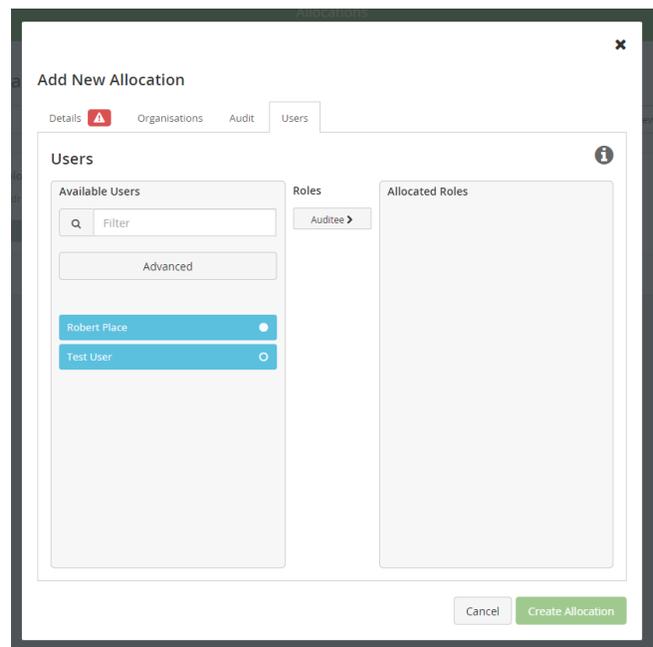
**Auditee** – can access and complete only the audit they are assigned

**Reviewer** (coming soon) – has read-only access to audits they are assigned

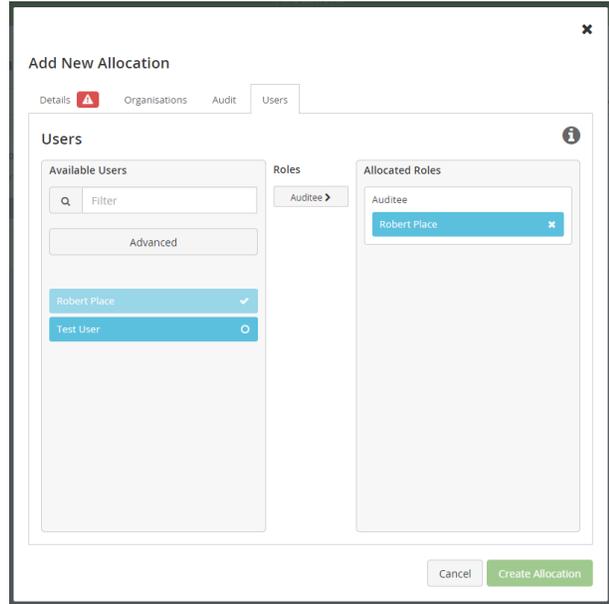
**Moderator** (coming soon) – once an Auditee has completed their audit a moderator is able to review and sign off for the Auditor.

**Auditor** (coming soon) – once an auditee and/or a Moderator has completed the audit process an auditor is able to review and mark an audit.

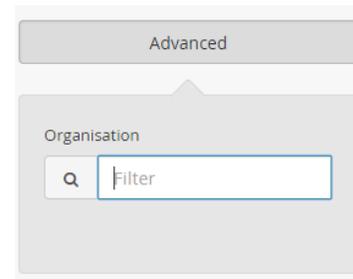
**Administrator** – has full access and administration rights to the full system. Can set up users, create audits and allocate them out



To unallocate an audit to an individual simply  select the icon next to their name.



If you wish to search for Users in a particular organisation please select the 'Advanced' icon on the Available Users box on the left hand of the screen. Here you'll be able to search for a specific organisations and view the Users assigned within.



Once you are happy with your allocation simply click the 'Create Allocation' icon.



You have now allocated an audit

### Additional information

 This little symbol will give you useful and helpful advice throughout your audit journey.