Contents

This Screens is Used for carrying out the Audits for the Projects Internally

1. Data Table

	Project Details		Last Audit Details							Schedule Details			Action
RAG/Prj Status/Name	Customer	Audit Type	Planned Date	Actual Date	Audited Date	Auditor Name	Trend	Reports	Type	Audit Status	Date	
● ● (P) Aetna - Meritain Health Cl...	Aetna	QCR	10-Feb-2022	10-Feb-2022		Shiva Ku..	100%	⬇	QCR ∨	To be Sche ∨		⚙
● ● (P) AMC: Managed Service 2022	American Multi-Cinema, Inc							⬇	QCR ∨	To be Sche ∨		⚙
● ● (P) Attorney's Title Insurance...	Attorney's Title Ins...							⬇	QCR ∨	To be Sche ∨		⚙
● ● (P) Boyd Gaming: Boyd Managed ...	Boyd Gaming Corporation							⬇	QCR ∨	To be Sche ∨		⚙
● ● (P) CBTS/CVS: Blockchain Innov...	Cincinnati Bell Tech...							⬇	QCR ∨	To be Sche ∨		⚙
● ● (P) CBTS: Enterprise Architect...	Cincinnati Bell Tech...							⬇	QCR ∨	To be Sche ∨		⚙
● ● (P) CDW Technologies: KAR Glob...	CDW Technologies, Inc							⬇	QCR ∨	To be Sche ∨		⚙

RAG/ Prj Status/ Name: Here we can have the Status of the Audit and Name of the project and by clicking on the Project Name complete details of the project will be shown.

Customer: Here we can find the details of the Customer to whom the Project belongs too.

Last Audit Details: These details will be available only once any Audit has happened in the Project.

Audit Type: Here we can find the type of the Audit in the project.

Planned Date: When the Last Audit was planned i.e., the scheduled date.

Actual Date: This is the date the audit has started.

Audited Date: When the Status of the Audit is Changed to Audited that date will be reflected over here.

Auditor Name: The Person who has audited the Project.

Trend: The Audit Score added by the Auditor will be reflected over here based on the calculation.

Reports: If any reports were added during the Audit reports those can be downloaded here.

Schedule Details: Here we can find the Present Status of the Audit and those details.

Type: The Type Audit we are about to perform can be selected here.

Audit Status: Here the level the Audit is can be changed here.

Date: Based on the Change in the Audit Status the Date will be updated.

Action: By clicking on the Action a new window pops up where we can add the facilitator Name.

2. Process Flow

Step 1: Here for the Project, we are about to start the Audit Process, by selecting the Type of audit we need to perform by Selecting it in the Type.

Step 2: The Status is on default is set to be Scheduled and will be changed to Scheduled and the date that is scheduled will be added in the date column.

Step 3: Now the Audit Process will be done by the Particular person who will perform the Process.

Step 4: Now Once the Audit process is done the Status will be changed to Audited and the date that is Audited will be entered in the Date column.

Step 5: Now If all the required steps for auditing the Project, then the Status will be changed to Completed.

Step 6: Once it's changed to completed a new window pop to update the Audit details/ Scores for the Project.

Step 7: Once all the details were updated and saved those all details will be reflected in the table below.

Step 8: Now by clicking on the Trend Number those details will be shown in a graphical representation.
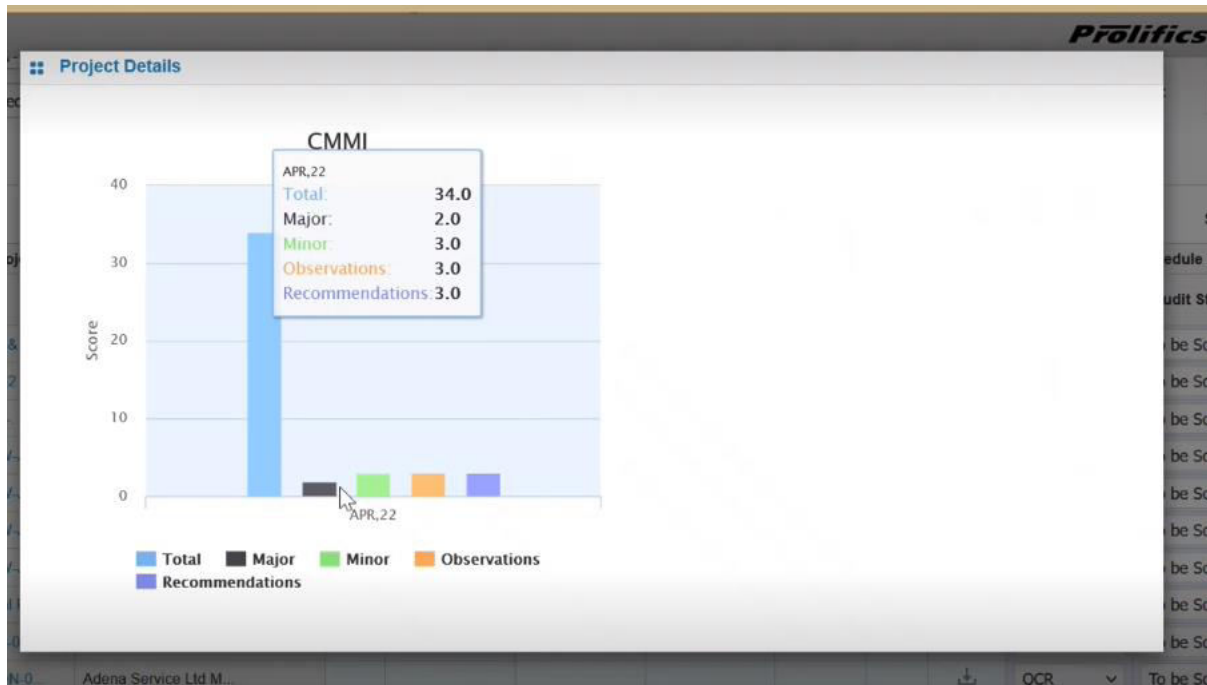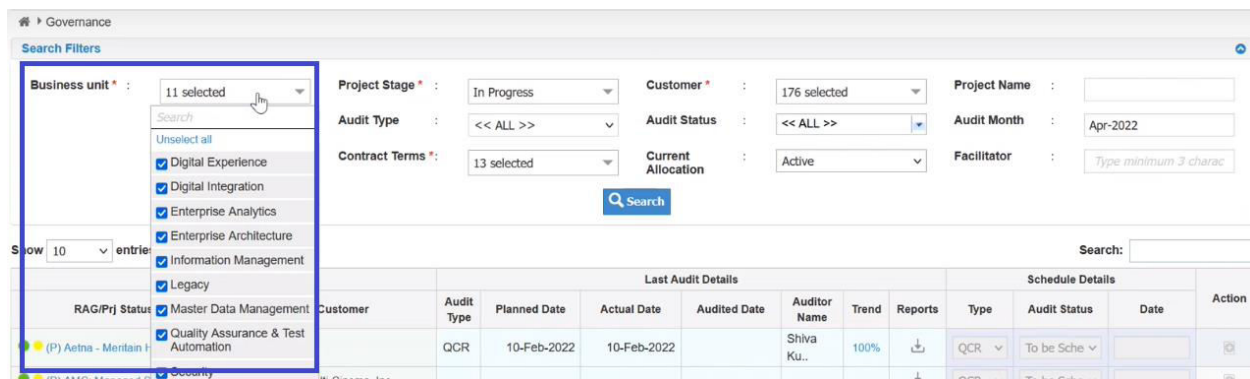
Step 9: By clicking on the Action add button can add the facilitator Name can be added here.
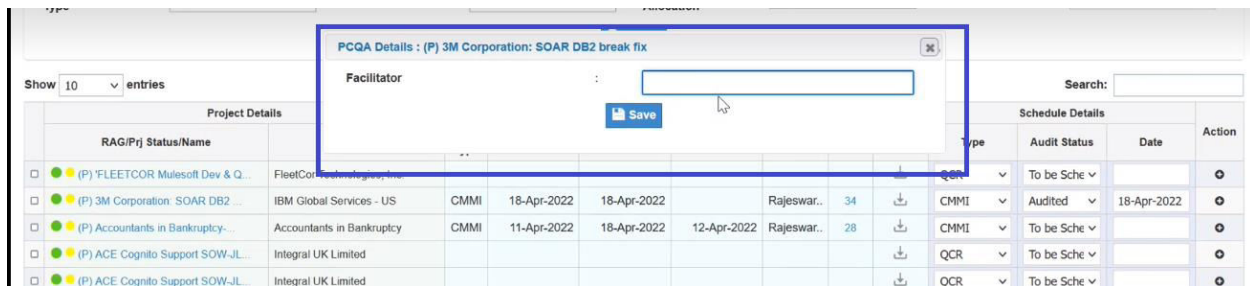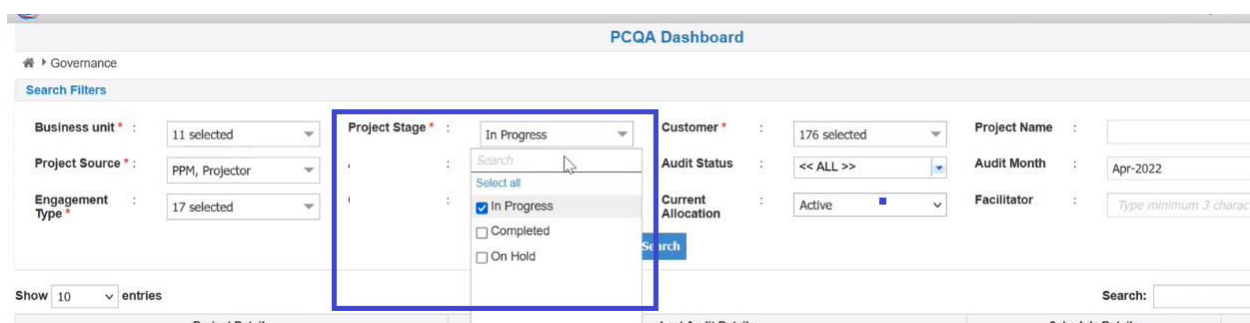

3. Filters

3a. Business Unit

Here we can select the Particular Business Unit either single or multiple Business Units of which the data will be displayed.

3b. Project Stage

Based on the Project Stage selected only those projects in that particular stage will be displayed

3c. Customer

Here we can select either the single or Multiple Customer or all the customer for whom the data will be displayed.

3d. Project Name

Here we can search for a particular project if we are looking for any particular project by entering the project name in the search bar.

3e. Project Source

Here in this selection, we can select particular projects based on the Internal Project source.

3f. Audit Type

Here by selecting the Audit type can filter only those projects in that Audit type in the Last Audit process happened.

3g. Audit Status

Here based on the Audit Status those projects in that particular status will be displayed in the table below.

3h. Audit Month

Here we can select the month for which the project audit happened.

3i. Engagement Type

Here we can select the projects based on the Engagement type selected during the Creation of the Project.

3j. Contract Terms

Here we can select the Projects bases on the Contract terms selected during the project creation.

3a. Current Allocation

Based on the Allocations in the projects those projects would be filtered.

3a. Facilitator

Here we can search for the Projects based on the facilitators by searching those names of the facilitator.