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HOW TO SET UP AUDITS

Overview

Set up pre-audits and post-audits in Simpro Premium for technicians to complete in Simpro Mobile. You can make audits mandatory to complete the job.

Audits are arranged in three types: **Safe Work Method Statements** (SWMS), **Job Safety Analysis** (JSA) and **Quality Assurance** (QA). Each audit within a type consists of a series of questions, which can be arranged within groups.

Note that any updates to the audits in Simpro Mobile apply to both the applications.

View audits

To view and search for existing audits, go to **System** ⚙️ **> Setup > Mobile**, then click **Simpro Mobile > Audits**. And, click an audit type to expand it.

To find a specific audit type, audit, group or question, enter a term in the search bar, then click **Search**. The audit navigation tree expands to show all occurrences of your search term in orange.

Click **Clear** or **Refresh** to view the navigation tree as normal.
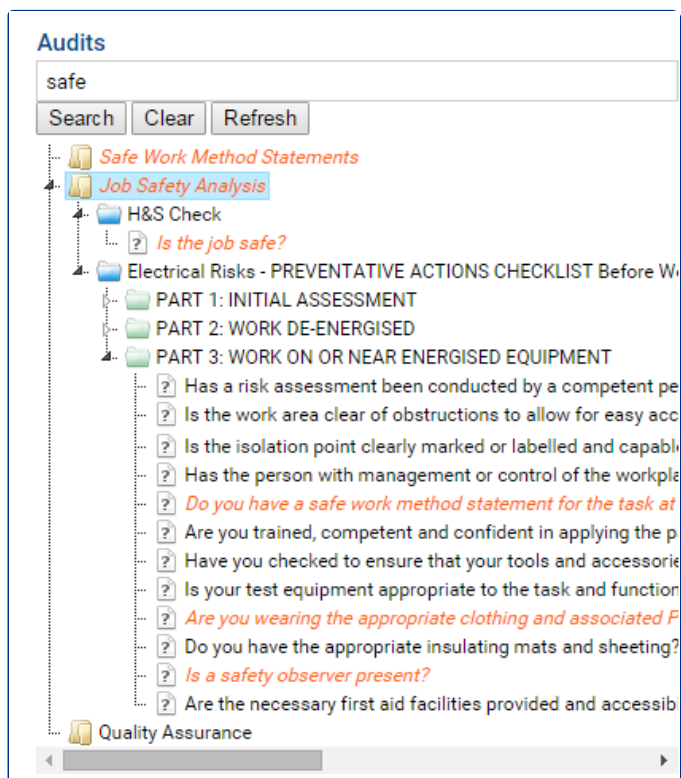
Create an audit

To create a new audit:

1. Go to **System** ⚙ **> Setup > Mobile > Simpro Mobile > Audits**.
2. Click **Options > Add New Audit** on the audit type.
3. Enter the **Audit** name and include a short **Description** if required.
4. Select whether the audit is to be performed **Before Job** or **After Job**.
5. Under **Job Requirement**, select:
   - **Not Required** to make the audit optional to complete.
   - **Once Per Job** to make the audit mandatory to complete once for every job.
   - **Once Per CC** to make the audit mandatory to complete once per cost centre.
   - **Once Per Day** to make the audit mandatory to complete once per day, per job, per cost centre.
6. Select whether the audit is required to be completed by **All Employees** or **At Least One Employee**.
7. Under **Available Cost Centres**, click cost centres to add them to the audit, or alternatively, click **Add All**.
   - Under **Assigned Cost Centres**, click cost centres to remove them from the audit, or alternatively, click **Remove All**.
8. Click **Save**.

As you create your audit, you can preview how your questions appear and proceed under **Questionnaire**. This is useful to ensure your questionnaire accurately reflects the audit process.

To edit an audit, click the audit in the navigation tree, or alternatively, right-click it, then click **Edit**. To delete an audit, click **Options > Delete**.

> ℹ Audits only appear in the workflow if they are assigned to the same cost centre as the job.

Create an audit from an existing template

Add a group

Use groups to organise related questions within an audit.

To add a new group to an audit, or to add a subgroup to an existing group:

1. Click **Options > Add New Group** on the audit or group.
2. Enter a **Group** name.
3. Enter a group **Description** if required.
4. Select **Mandatory** to make questions within the group mandatory to complete.

To edit an existing group, click the group name and make changes as required. To delete a group, click **Options > Delete**.

Add a question

When you create a new question to add to an audit or audit group, there are several ways to set up how a technician can respond to the question when completing an audit:

Text	Type the response into a text box.
Options (single select)	Select a single response from a list of options.
Options (multi select)	Select multiple responses from a list of options.
Response Templates	A previously created list of response options, for example Yes / No, Risk Rating etc.

You can also set up how the audit proceeds when a technician responds to a question:

Proceed	Proceed to the next question.
Go To	Go to a specified question other than the next question.
End, Allow Job Completion	Used for the last question in the questionnaire. The technician can complete the job after responding to this question.

End, Prevent Job Completion	Used for the last question in the questionnaire. The technician cannot complete the job after responding to this question.

Add a question with a text response

To add a question with a text response:

1. Click **Options > Add Question** on the audit / audit group.
2. Enter the **Question**.
3. Select **Mandatory** to make the question mandatory to complete.
4. Enter a **Description** if required.
5. Under **Response Type**, select **Text**.
6. Under **Response Options**, select an **Action**.

Add a question with a single select response

To add a question with a single select response:

1. Click **Options > Add Question** on the audit / audit group.
2. Enter the **Question**.
3. Select **Mandatory** to make the question mandatory to complete.
4. Enter a **Description** if required.
5. Under **Response Type**, select **Options (single select)**.
6. Click **Add Option** to add to the list.

The **Response Options** vary by audit type. For most audit types, you can add an optional message for each option.

For audits created under **Safe Work Method Statements**, you can add an optional message for both **Hazards / Risks** and **Control Measures**. The **Hazards / Risks** are shown on the next screen after selecting the option in Simpro Mobile.

For each option, specify a follow-on **Action**. These are the same as for the text response type.

Select **Allow Other** to allow the technician to enter a different answer in an **Other** text box.

Click and drag the **grey drag handle** to reorder options.

Add a question with a multi select response

To add a question with a multi select response:

1. Click **Options > Add Question** on the audit / audit group.
2. Enter the **Question**.
3. Select **Mandatory** to make the question mandatory to complete.
4. Enter a **Description** if required.
5. Under **Response Type**, select **Options (multi select)**.

6. Continue to create options as required.

Like **Options (single select)**, you can add **Hazards / Risks** and **Control Measures** to audits created under **Safe Work Method Statements**.

> ⓘ The only follow on action for a multi select response is **Proceed**.

Add a question with a response template

To add a question with a response template:

1. Click **Options > Add Question** on the audit / audit group.
2. Enter a **Question**.
3. Select **Mandatory** to make the question mandatory to complete.
4. Click **Response Templates** to view previously created responses response templates. Click **Use Template** to add one.
   - Alternatively, select a response type from the **Response Type** drop-down list.
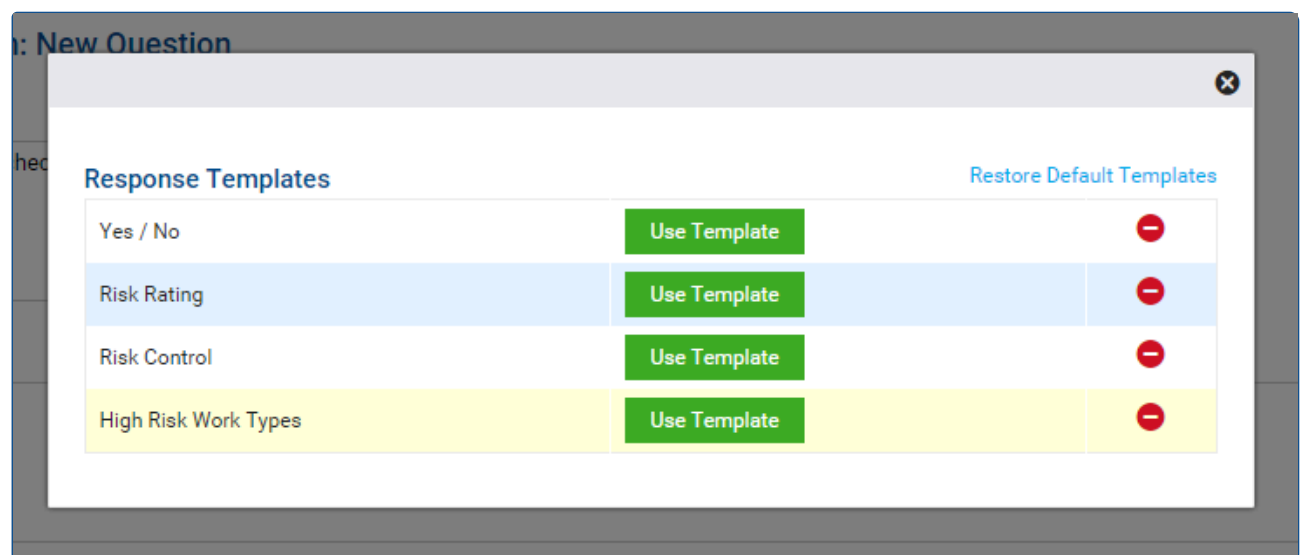
If you use these response options often, click **Save as New Template**.

 Learn more in the Learning Toolbox

For additional training, complete an interactive material in the Simpro's Learning Toolbox. Learn more in About Simpro's Learning Toolbox.

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