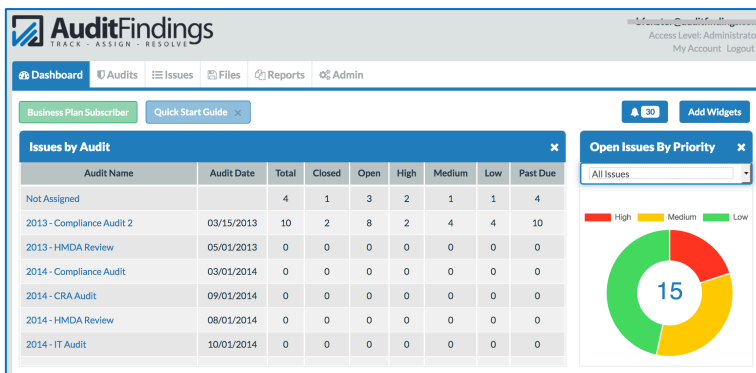


## QUICK START GUIDE

Welcome to AuditFindings! With AuditFindings you have an easy-to-use solution to track and resolve audit issues. We created this guide to help outline key aspects of the system. Some features of your account may differ slightly depending on your account type and access level.

### NAVIGATING THE SYSTEM



**Dashboard.** Use widgets on the Dashboard to view information related to audits and issues. Depending on your access level, you may have different widgets available.

**Issues Tab.** This tab lists information related to one or more audits. Use the Filter/Search button to limit the information to only what you need. Some users may be limited to viewing only issues assigned to them.

**Audits Tab.** This tab allows you to enter information on various audits. Once an audit is added, issues may be associated with the audit manually or by bulk import from the Issues tab.

**Files Tab.** This tab allows you to upload and manage documents, such as Audit reports. Documents may be associated with a specific audit or issue from that specific item's edit menu.

**Reports Tab.** This tab provides you access to various reports. From here, you can view reports on the screen, or export to a PDF or Excel document. You may also create and save custom reports.

**Admin Tab.** This tab provides access to administrative functions, such as adding users or managing tags, departments, or audit types.

The following pages outline Key Tasks and Frequently Asked Questions.

## KEY TASKS

**Upgrading Your Account.** If you would like to use the advanced features, including adding multiple users, you must first upgrade your account. To upgrade, click the Upgrade account from the Dashboard or go directly to the Admin tab. There is no long-term commitment, so you can downgrade at any time.

**Importing Issues.** To quickly get items into the system, you can import issues from Excel or comma separated values file. It works best if you import one audit's issues at a time. The process is outline below.

- 1) From the Audit tab, add the names of the audits the you intend to import issues (optional).
- 2) We recommend that your spreadsheet(s) are organized by audit. The system imports issues and assigns them to one audit at a time.
- 3) Go to the Issues tab, and select import.
- 4) Select the desired Audit in the dropdown. If you do not select an audit, they will be imported with an audit name of "Not Assigned." Although these can be assigned to audits later, it is much easier to assign them during the import.
- 5) Map the import fields from the system to the spreadsheet. The Issue Name is a required field.
- 6) Select Import.

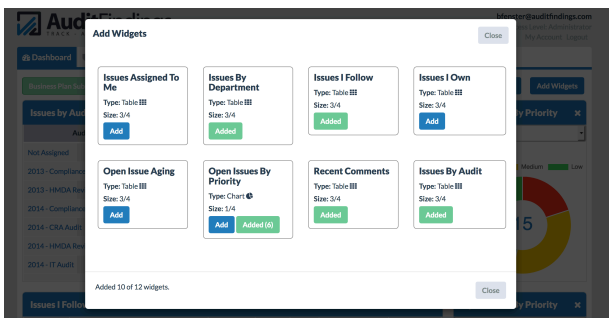
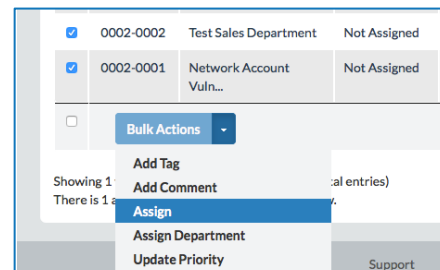
**Adding Users.** Limited assignees can be added from the issue modal or from the Admin user management section. Limited assignees do not have access to the portal and will not receive email updates. To add higher level users, you must upgrade your account via the Admin tab or contact support@auditfindings.com. From the Admin tab, User Management section, enter the user's information and they will be automatically sent an email invitation to complete their account setup, or import via a spreadsheet. The user access levels are below.

Level	View	Update	Add	Assign	Archive	Delete
Administrator	Yes	Yes	Yes	Yes	Yes	Yes
Manager	Yes	Yes	Yes	Yes	Yes	
User	Yes	Yes	Yes	Yes		
Assignee	Yes	Yes				
Limited Assignee	No	This account does not provide access to the portal. It is only for internal tracking of assigned items.				

**Using the Filter/Search.** From the Audit or Issues tab, click the Filter/Search button to display the available filtering options. To reset the filter, click the Clear button.

The screenshot shows the 'Issues' tab in a software interface. At the top, there are navigation tabs: Dashboard, Audits, Issues (selected), Files, Reports, and Admin. Below the navigation, there are buttons for 'Filter/Search', 'Import', and 'Add New'. The main area contains several filter fields: 'Issue Name', 'Description', 'Tags', 'Audit' (dropdown), 'Priority' (dropdown), 'Status' (dropdown), 'Assigned' (dropdown), 'Department' (dropdown), and 'Custom Fields' (dropdown). There are also checkboxes for 'Only Repeat Issues', 'Show Archived', and 'Issues I Follow'. At the bottom right, there are 'Clear' and 'Search' buttons.

**Using the Bulk Actions.** From the Audit or Issues tab, you may perform actions on multiple items at one time. Select the items to modify and then select the desired actions via the Bulk Actions button. Depending on the selected action, there will be different options provided.



**Using Dashboard Widgets.** There are several widgets available on the Dashboard. These widgets allow you quick access to relevant information. These widgets can be added via the Add Widgets button. You may remove or order the widgets as well.

**Exporting Issues.** There are two primary methods for exporting issues. You may export issues directly from the Issues tab or via the Reports tab.

Exporting via the Issues tab. When exporting from the Issues tab, select the desired issues via the check box on the left. This task is often accomplished by using the filter/search function, then selecting all items. Once selected, use the Bulk Actions feature and select Export. Then select the desired file type.

Exporting via the Reports tab. When exporting from the Reports tab, select the appropriate report and then select *Export to PDF* or *Export to Excel*.

**Following an Issue.** This feature allows you to easily keep track important items that may be assigned to others. You can select an issue to follow via the Issues tab by selecting the yellow star, using the Bulk Actions, or when editing a specific issue. Once you select an issue to follow, it will display on the Dashboard widget *Issues I Follow* and will be indicated on the Issues tab with the yellow star. You may also limit your Issues tab display to issues that you follow via the Filter/Search button.

## FREQUENTLY ASKED QUESTIONS

**If we upgrade, are we committed to a long-term contract?** No. Accounts are month-to-month so there is no long-term commitment.

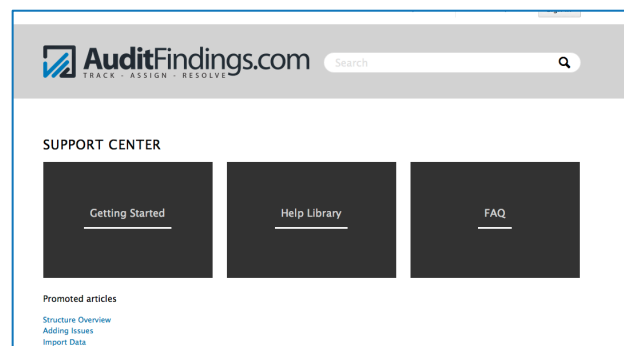
**What are Tags?** Tags are labels that you may assign to any issue or audit. You can create as many tags as you need. These tags can then be used to filter or search for specific items.

**Can an Assignee see items not assigned to them?** An assignee can only see issues assigned to them. An assignee will have access to the *Issues Assigned To Me* widget on the Dashboard, and their Issues tab will only display items assigned to them. However, if files are attached to an issue assigned to them, they will be able to view and download that file.

## SUPPORT CENTER

The Support Center provides helpful information on using the system, including a Getting Started section. You can submit trouble tickets through the Support Center or join the community section to communicate with your peers.

The Support Center is accessed from the link at the bottom of the page or at <https://support.auditfindings.com>.



If you have any other questions, or need assistance, please contact us at [support@auditfindings.com](mailto:support@auditfindings.com). We would love to hear from you.