

AUDIT REQUISITION MODULE

Request Requisition Module

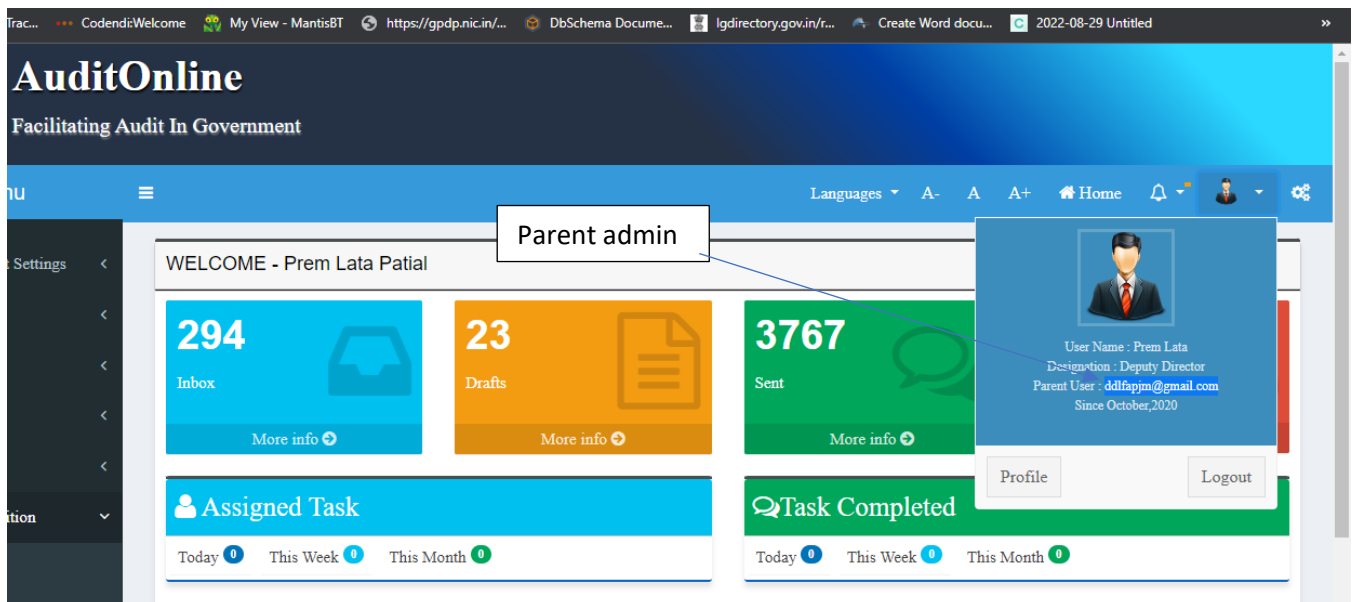
- ➔ This module is designed to request/exchange crucial information in the form of documents and images from within the Auditing team (internally) or from the Auditee entity (externally)
- ➔ The Request requisition role needs to be assigned to the workflow player (Auditing Authority) participating in the Audit Process.
- ➔ This Role or any other role may only be assigned from the parent admin of that User/Workflow player

The whole process of Request requisition may be successfully carried out post assigning the role to the workflow players

AUDITING AUTHORITY CASES

Case 1: How to assign a role to a workflow player?

Roles are always assigned from a parent admin login who has created that very user and to figure out who is the parent admin of a user then we need to first login with that user and then need to click on user section as shown in the below screen.



- ➔ Assigning role from the parent admin login:

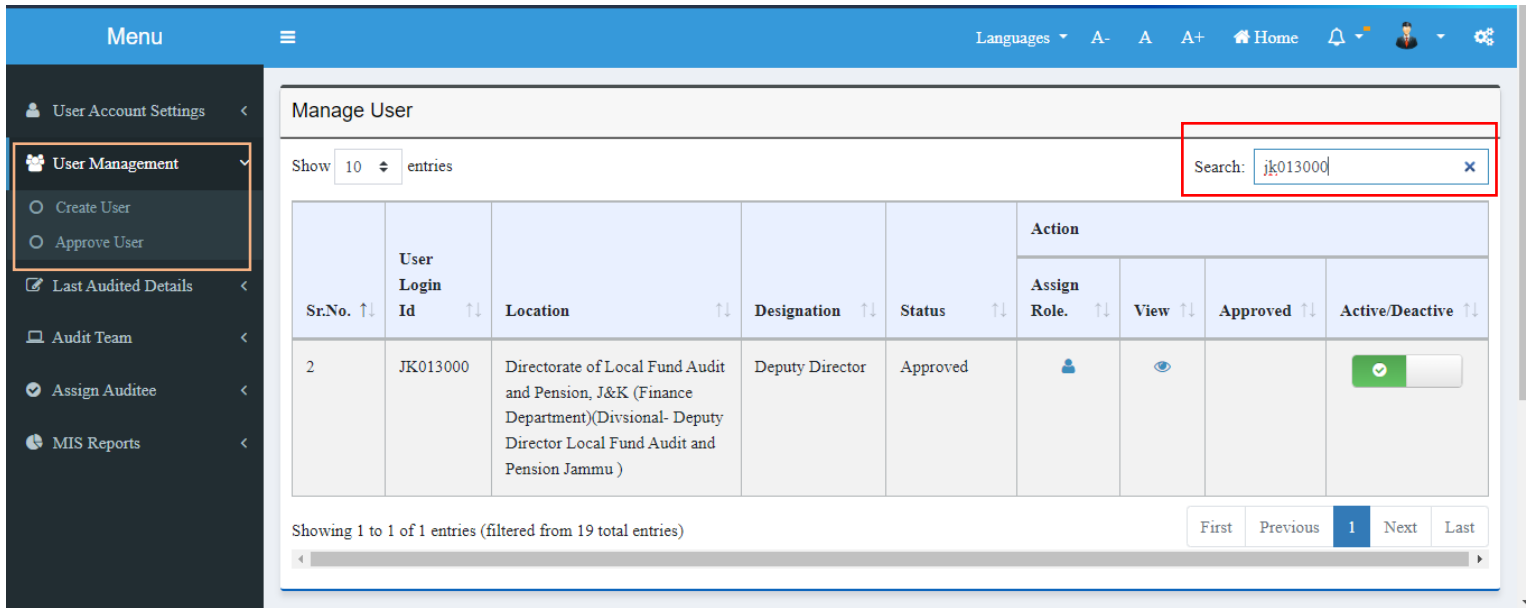
Login with the parent user/admin and assign the request requisition role as shown in the screen below:

Step 1: Click on user management and then click on approve user as shown in the orange highlighted rectangle.

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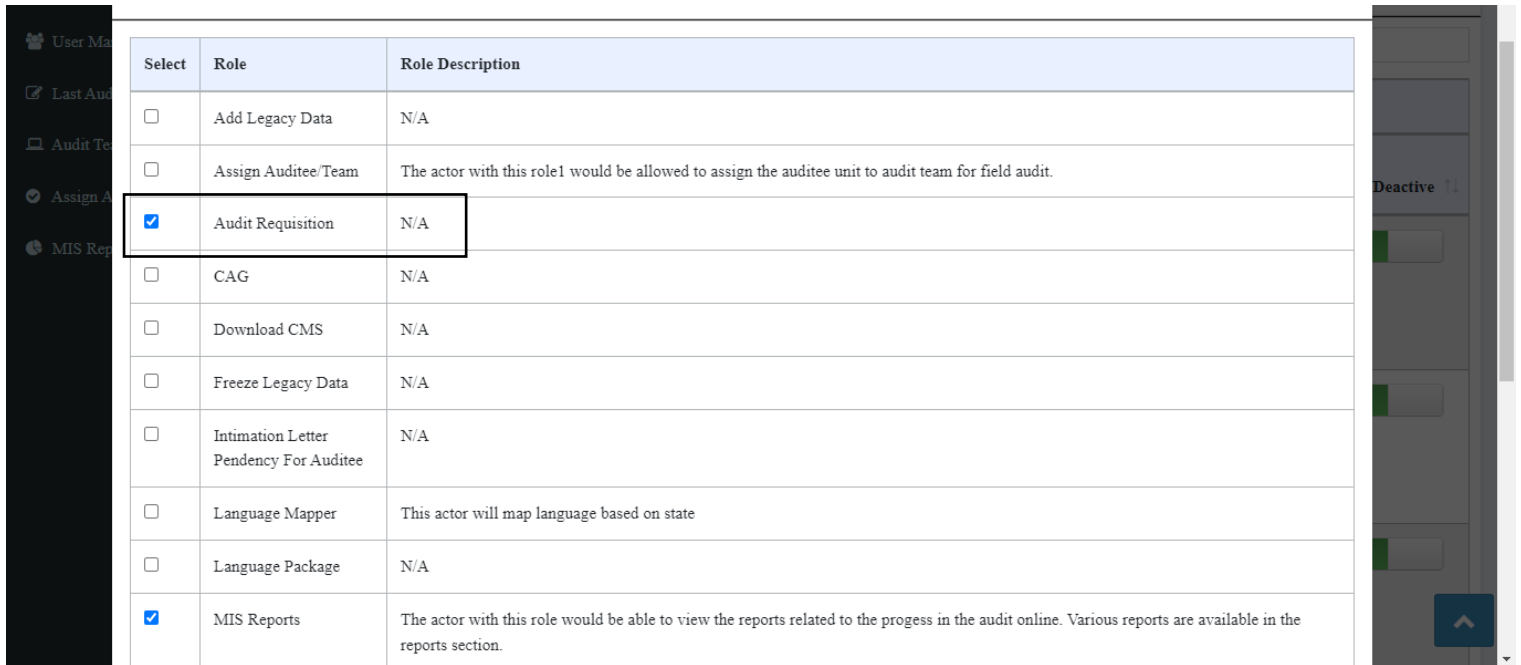
Step 2: Search the user to whom the role needs to be assigned as shown in red highlighted rectangle.

Step 3: Click on the '  ' icon under Assign role heading as seen in the screenshot

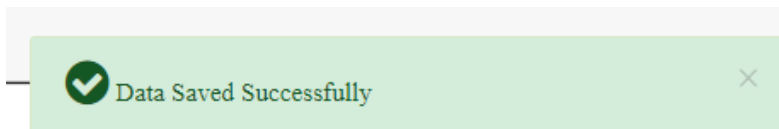


The screenshot shows the 'Manage User' interface. A search bar at the top right contains the text 'jk013000'. Below the search bar is a table with columns: Sr.No., User Login Id, Location, Designation, Status, and Action. The Action column has sub-columns: Assign Role, View, Approved, and Active/Deactive. The 'Assign Role' sub-column for the first row contains a user icon. The table shows one entry for user JK013000, Deputy Director, with status 'Approved'. A pagination bar at the bottom indicates 'Showing 1 to 1 of 1 entries (filtered from 19 total entries)'.

Step 4: The assign role matrix will appear and now select the role by checking the checkbox as shown below and the role will be assigned to that user.



The screenshot shows the 'Assign Role' matrix. It is a table with columns: Select, Role, and Role Description. The 'Audit Requisition' role is selected with a checked checkbox. The 'MIS Reports' role is also selected. The 'Assign Auditee/Team' role has a description: 'The actor with this role1 would be allowed to assign the auditee unit to audit team for field audit.' The 'Language Mapper' role has a description: 'This actor will map language based on state'.

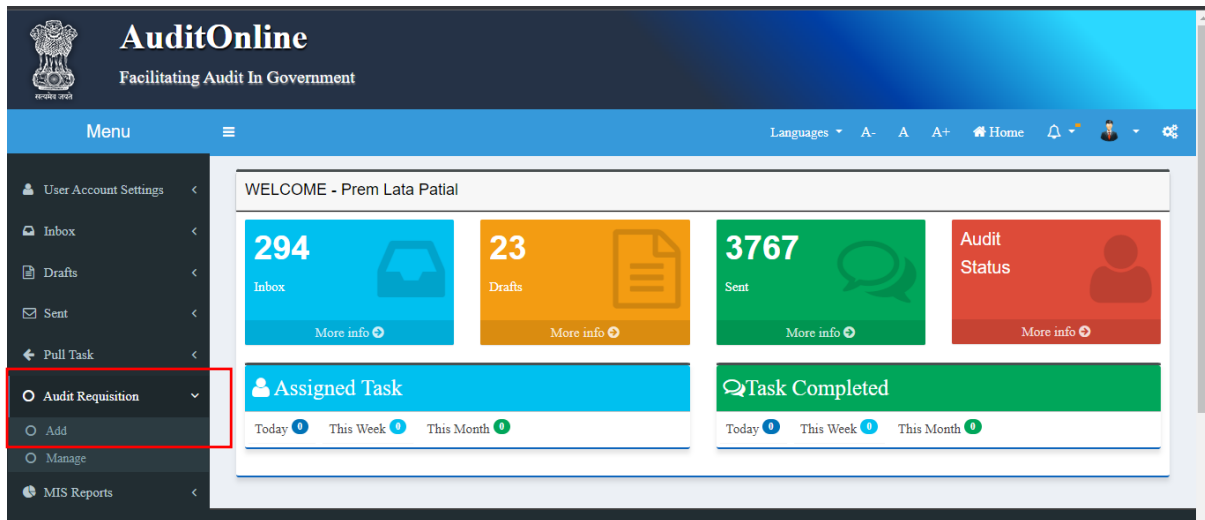


A green success message box with a checkmark icon and the text 'Data Saved Successfully'.

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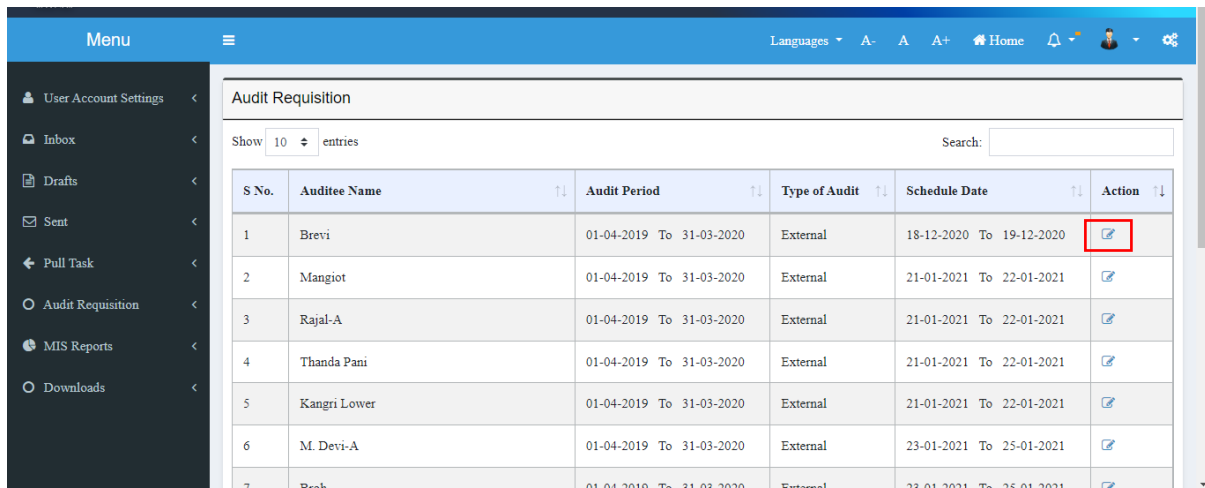
Case 2: How to Use Request requisition or how to send the request for documents?

Step 1: Login to the user account assigned with Request Requisition role as shown in the below screenshot and click on 'ADD'.










The screenshot shows the AuditOnline dashboard for user Prem Lata Patial. The dashboard includes a navigation menu on the left with 'Audit Requisition' highlighted. The main content area displays a welcome message and several summary cards: Inbox (294), Drafts (23), Sent (3767), and Audit Status. Below these are sections for 'Assigned Task' and 'Task Completed', both showing counts for Today, This Week, and This Month.

Step 2: All the panchayats assigned to that user shall be made available as a list and the user may choose to send the request to any of the Auditee entity as shown below:



The screenshot shows the 'Audit Requisition' list. It features a search bar and a table with the following data:

S No.	Auditee Name	Audit Period	Type of Audit	Schedule Date	Action
1	Brevi	01-04-2019 To 31-03-2020	External	18-12-2020 To 19-12-2020	
2	Mangiot	01-04-2019 To 31-03-2020	External	21-01-2021 To 22-01-2021	
3	Rajal-A	01-04-2019 To 31-03-2020	External	21-01-2021 To 22-01-2021	
4	Thanda Pani	01-04-2019 To 31-03-2020	External	21-01-2021 To 22-01-2021	
5	Kangri Lower	01-04-2019 To 31-03-2020	External	21-01-2021 To 22-01-2021	
6	M. Devi-A	01-04-2019 To 31-03-2020	External	23-01-2021 To 25-01-2021	
7	Broh	01-04-2019 To 31-03-2020	External	23-01-2021 To 25-01-2021	

Step 3: After clicking action button the request requisition form will appear as shown below, now it is required to fill in the mandatory details and also the provision to attach the files is provided (can be seen in the series of screenshot below):

AUDIT REQUISITION MODULE

Add Audit Requisition

Office Name: Brevi

Audit Requisition Title*: Clarification on Half Margin

Due Date*: 16/02/2023

Description*: Please provide the clarification on the supplied/attached half margin

Attach Files:

Save And Send | Clear | Close

Screenshot 1 (Fill the mandatory fields in the form)

Attachment

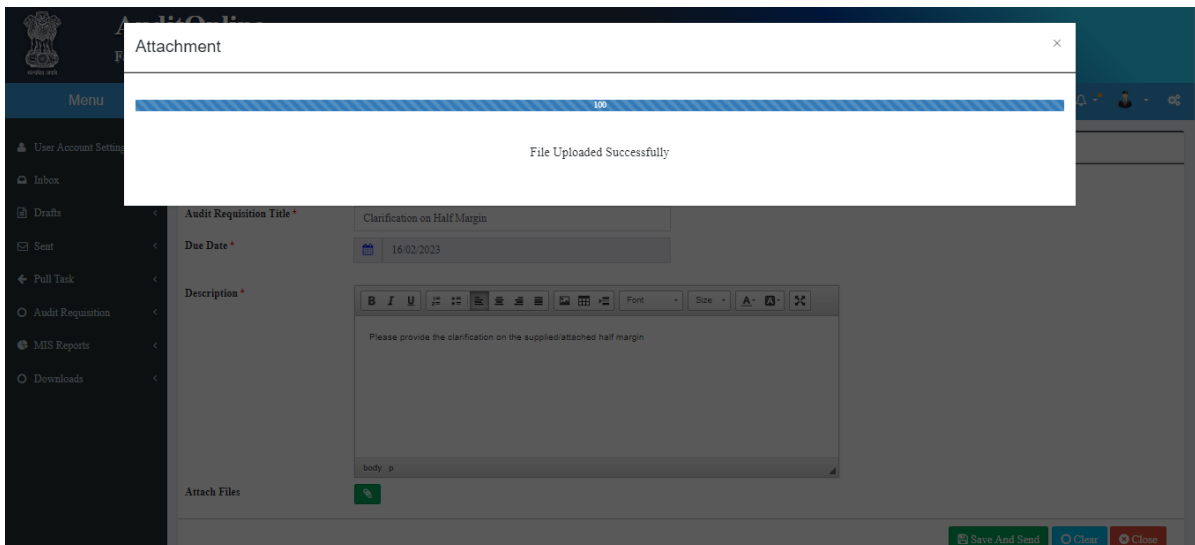
Note: 1) Supported File formats are jpeg, jpeg, png, bmp, pdf.
2) File Size cannot be greater than 5MB.

Attach File	Remarks	Add/Remove
<input type="button" value="Choose File"/> Adobe Scan...2023 (2).pdf	Half Margin dummy file	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="button" value="Choose File"/> No file chosen		<input type="button" value="-"/>

Upload

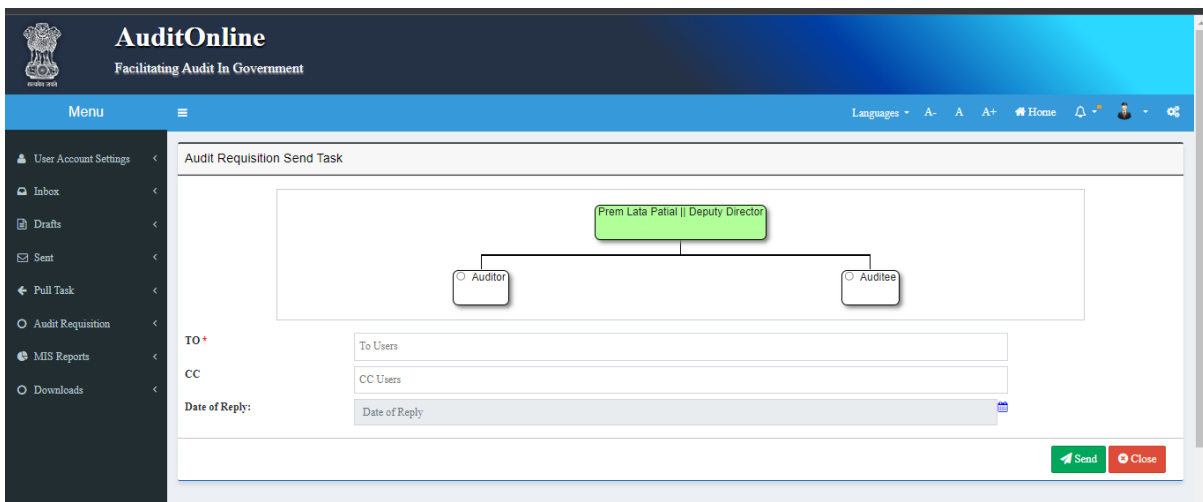
Screenshot 2- (provision to upload files as an attachment)

AUDIT REQUISITION MODULE

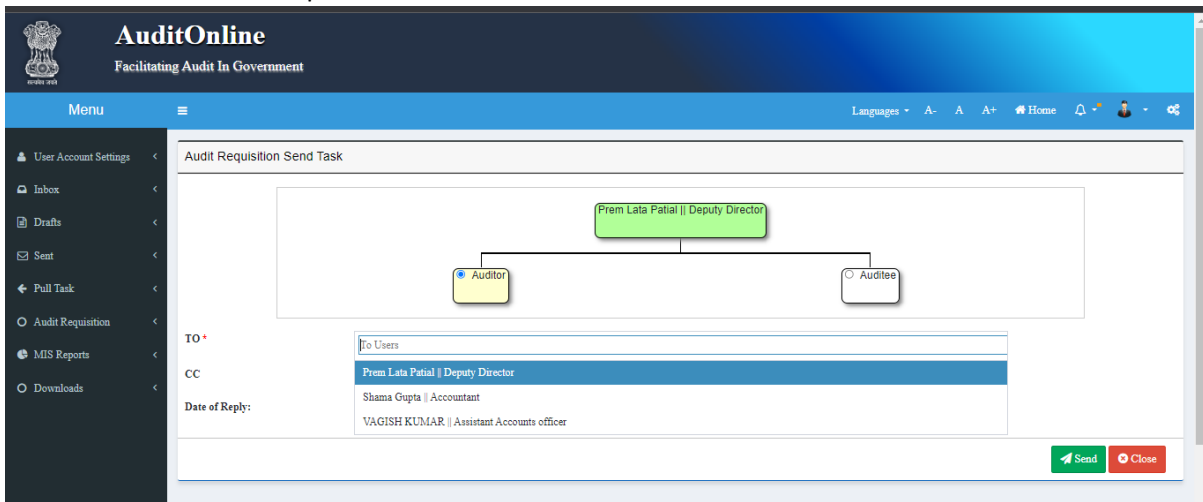


Screenshot 3: (File uploaded successfully message and close the alert)

Step4: Now click on Save and send button as shown in the below screenshot the next screen to forward the task will appear. (You may request the documents either from the participating audit team or from the auditee)



Step 5: Bases on the choice made as shown below the name of the person shall appear along with the designation, you may choose one in case of multiple names appear in the drop down and may click on 'SEND' button to proceed.



AUDIT REQUISITION MODULE

Case 3: How to manage documents request made through Request requisition module?

To view, modify and delete the document request made from any panchayat using Request requisition then you need to click on Audit Requisition in the menu and then need to click on the manage for the same.

AuditOnline
Facilitating Audit In Government

Menu

Languages A- A A+ Home

User Account Settings <
Inbox <
Drafts <
Sent <
Pull Task <
Audit Requisition <
MIS Reports <
Downloads <

Audit Requisition

Show 10 entries Search:

S No.	Auditee Name	Audit Period	Type of Audit	Schedule Date	Action			
					View	Modify	Delete	Forward
1	Brevi	01-04-2019 To 31-03-2020	External	18-12-2020 To 19-12-2020				

Showing 1 to 1 of 1 entries

Previous 1 Next

Case 4: Where to check the requested documents received from Auditee side through Request requisition module?

Step 1: Login to your account and then on inbox to find the request requisition as shown in the screenshot below:

AuditOnline
Facilitating Audit In Government

Menu

Languages A- A A+ Home

User Account Settings <
Inbox <
Drafts <
Sent <
Pull Task <
Audit Requisition <
MIS Reports <
Downloads <

Inbox

Inbox ccTask **RequisitionTask**

S No.	Auditee Name	Component Name	Audit Period	Type of Audit	Schedule Date	No. of Sent Task	Action
1	Brevi	14FC	01-04-2019 To 31-03-2020	External	18-12-2020 To 19-12-2020	2	

Step 2: Click on action button to view the trail of communication exchanged and responses shared by the audited authority as shown below:

AUDIT REQUISITION MODULE

The screenshot displays the 'Audit Requisition Module' interface. At the top, it shows 'Requisition No. : 2', 'Requisition Title : Clarification on Half Margin', and 'Due Date : Feb 16, 2023'. Below this, there are two response sections: one from '(Prem Lata Patial Deputy Director)' and another from '(Khalil Ahmed Panchayat Secretary)'. The second section contains the text 'I am sending the files requested as an attachment, please let me know for more'. A 'Remarks' section with a rich text editor is also visible. At the bottom, there are two buttons: 'End Requisition' (yellow) and 'Follow up' (red). Callout boxes provide instructions: 'View/download attachment's from here' points to the 'Copy' button; 'If no need of further follow up, then choose to end the' points to the 'End Requisition' button; and 'If need further info/data on the response shared, then choose to follow up' points to the 'Follow up' button.

AUDITED AUTHORITY CASES

Case 1: How to check for a document request requisition made from Auditing authority?

To check any requisition task a user needs to login to his/her account and then click on Requisition Task as shown in the below screenshot:

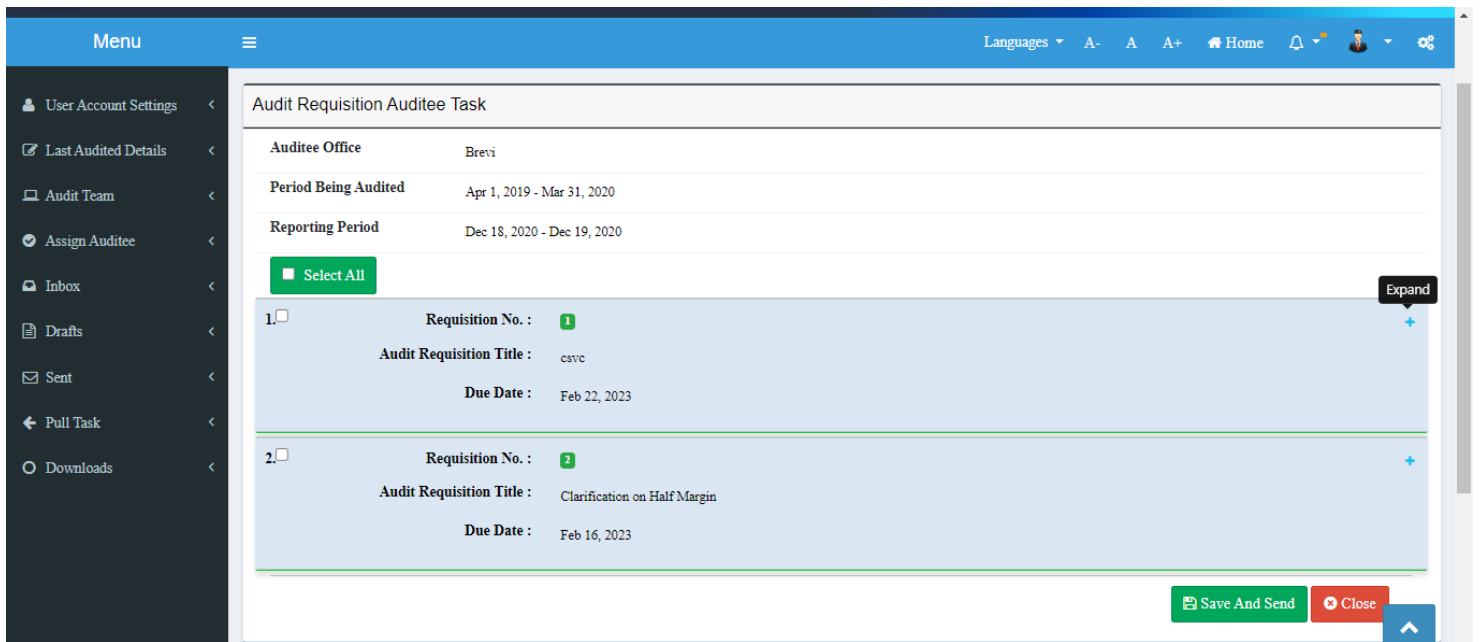
The screenshot shows the 'AuditOnline' dashboard with the header 'Facilitating Audit In Government'. A left sidebar contains a 'Menu' with options like 'User Account Settings', 'Last Audited Details', 'Audit Team', 'Assign Auditee', 'Inbox', 'Drafts', 'Sent', 'Pull Task', and 'Downloads'. The main content area is titled 'Inbox' and contains a 'RequisitionTask' link highlighted with a red box. Below the link is a table with the following data:

S No.	Auditee Name	Component Name	Audit Period	Type of Audit	Schedule Date	No. of Sent Task	Action
1	Brevi	14FC	01-04-2019 To 31-03-2020	External	18-12-2020 To 19-12-2020	2	

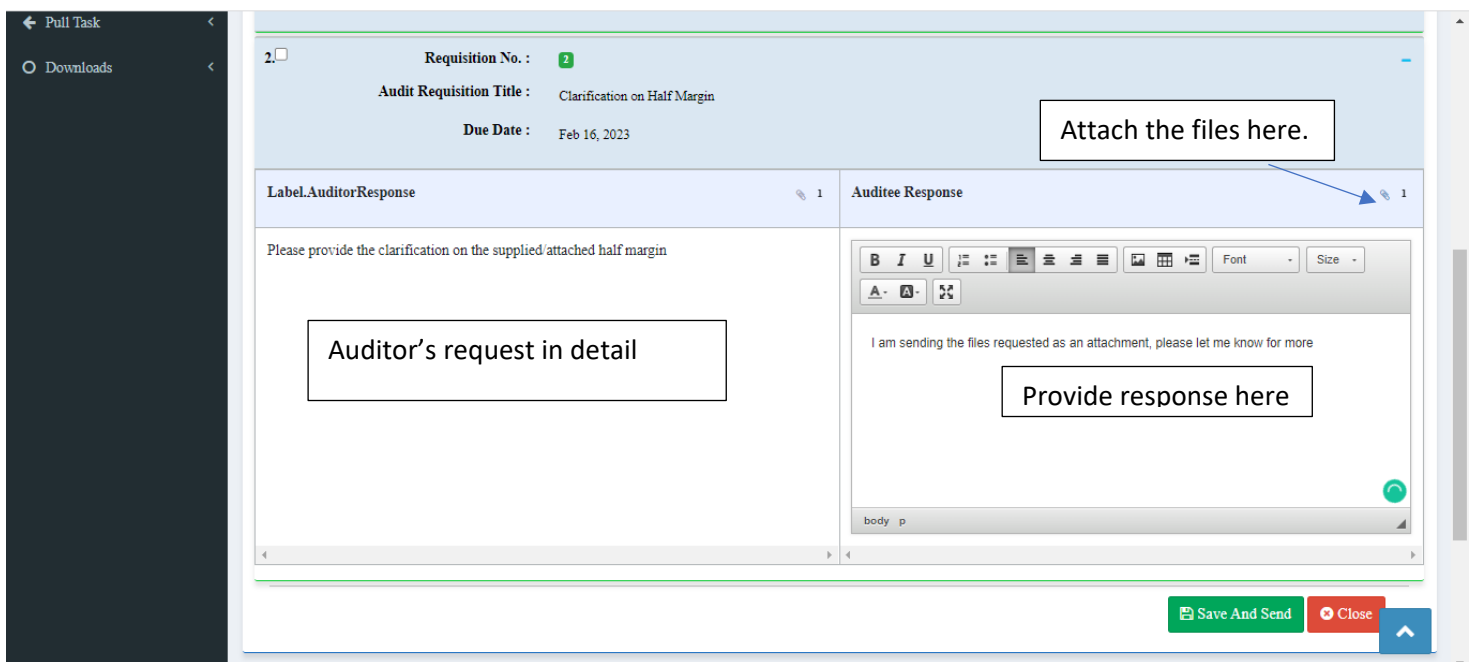
Case 2: How to provide/reply to the documents requested by an Auditing authority?

Step 1: Auditee user will click on action button to move to the next screen as shown in screenshot-1, now they need to expand the request made and need to provide their response on the same as shown in screenshot-2,

AUDIT REQUISITION MODULE



Screenshot-1



Screenshot-2

Step 2: Once the responses are made against each request the auditee user should save and send the data as shown below:

