AUDIT REQUISITION MODULE

Request Requisition Module

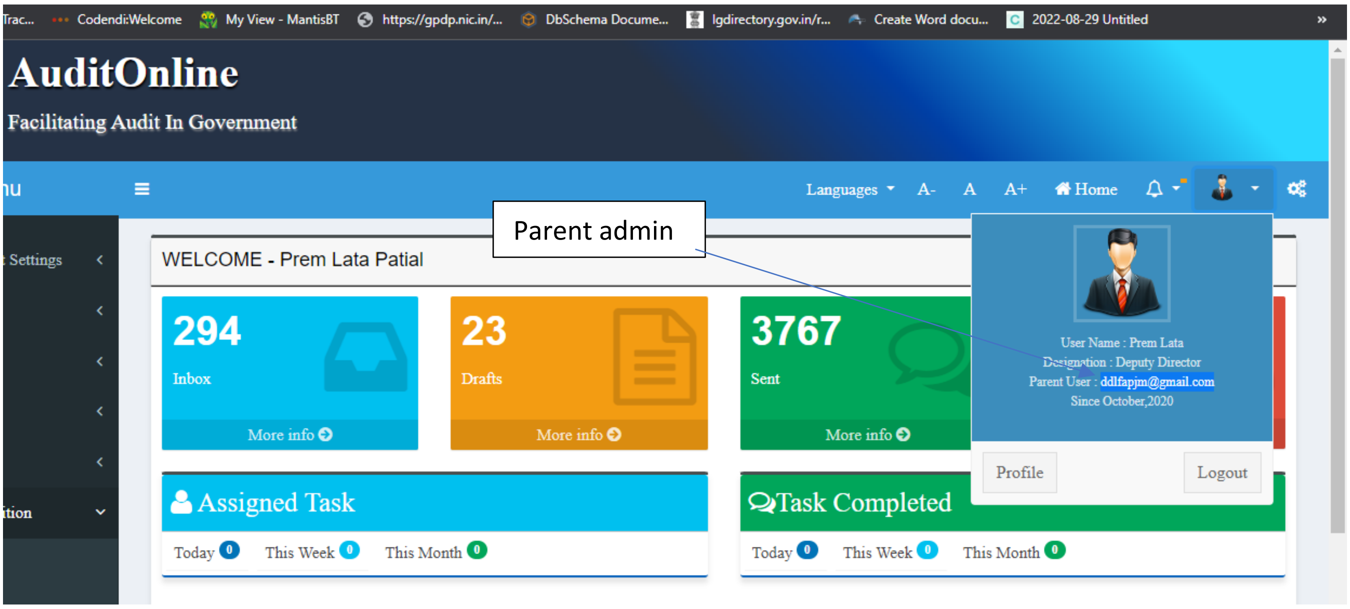
- This module is designed to request/exchange crucial information in the form of documents and images from within the Auditing team (internally) or from the Auditee entity (externally)
- The Request requisition role needs to be assigned to the workflow player (Auditing Authority) participating in the 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 succesfully 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.



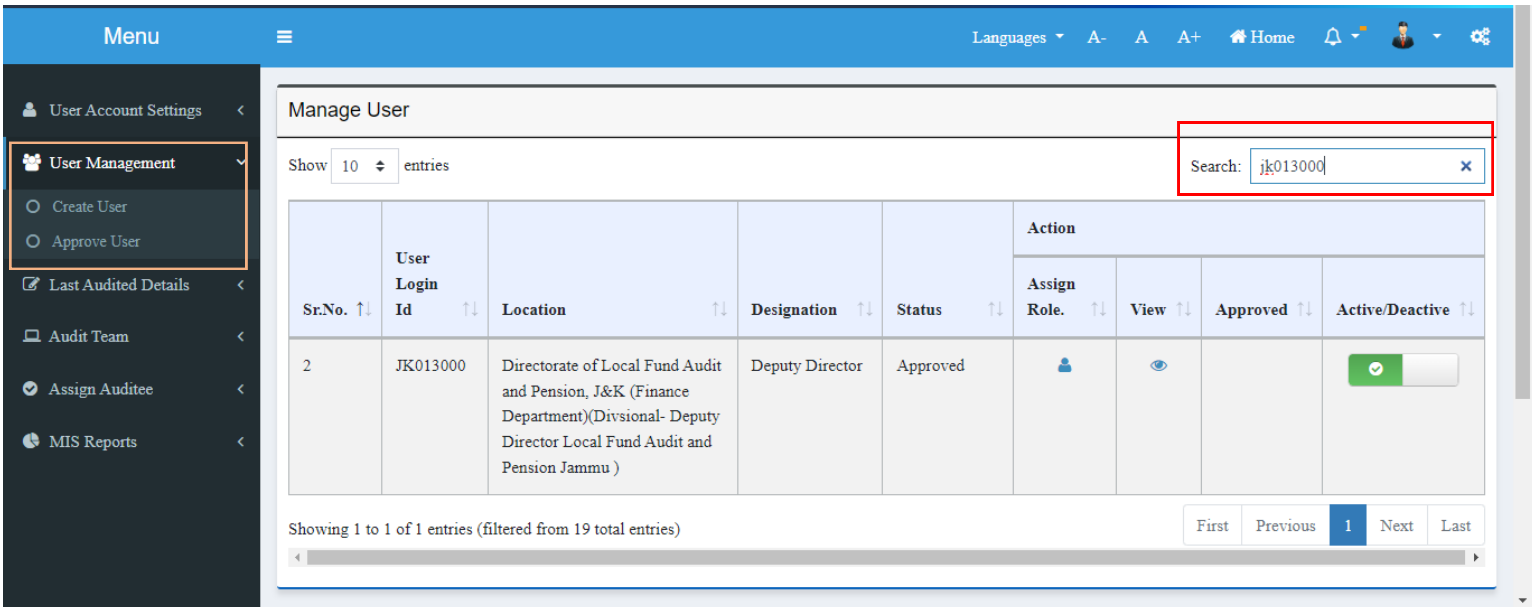
- Assiging role from the parent admin login:

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

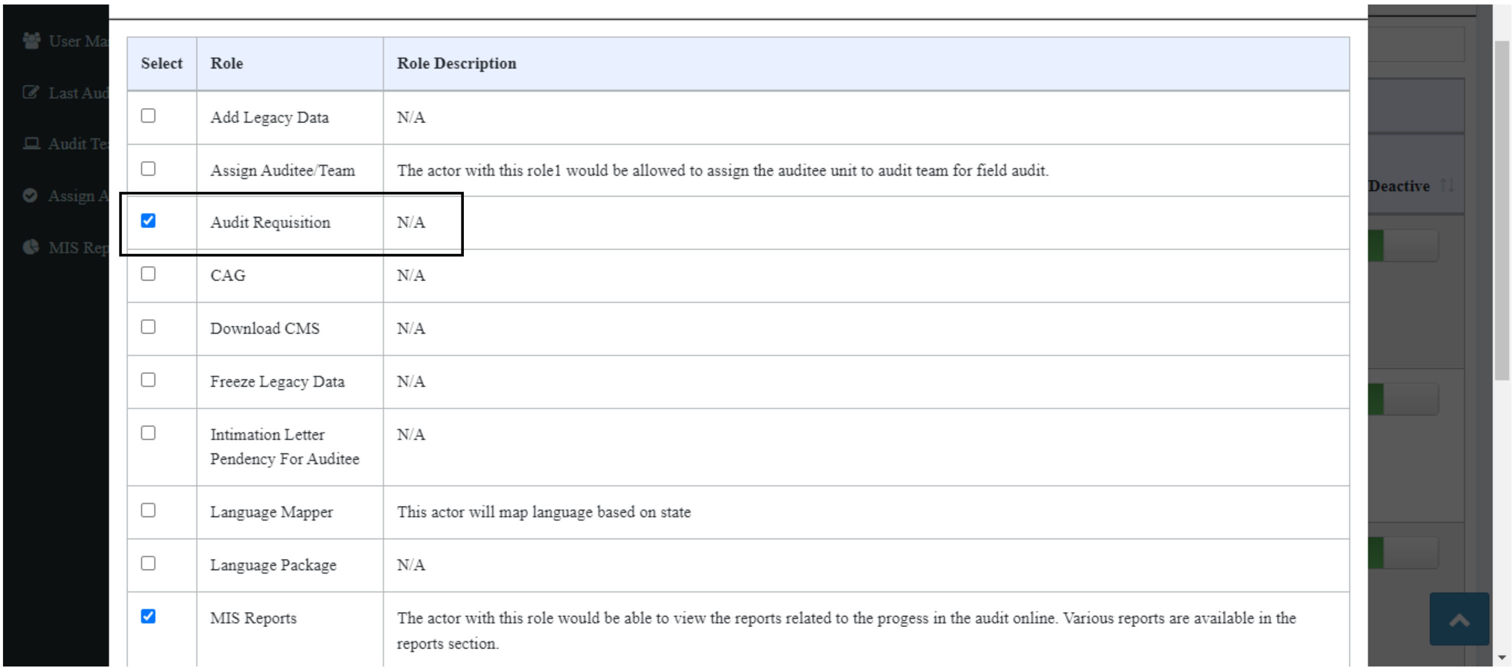
Step 1: Click on user management and then click on approve user as shown in the orange highlighted rectangle.

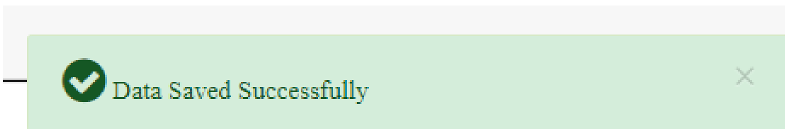
Step 2: Search the user to whom the role needs to be assigned as shown in red highlighted rectangle.

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



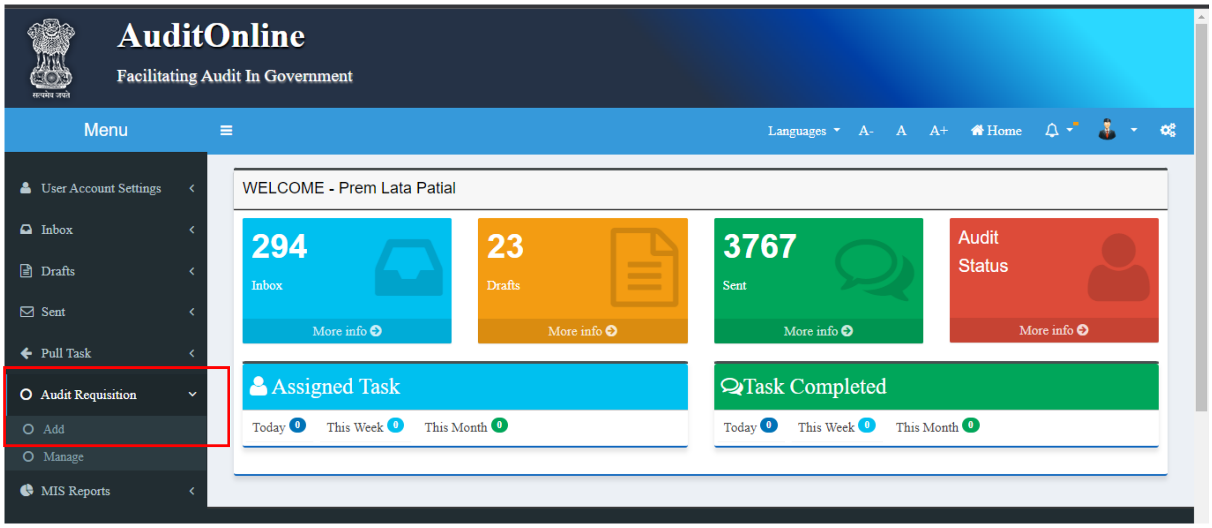
Step 4: The assign role matrix will appear and now select the role by checking the checkbox as shown below and the role will be assigned to that user.



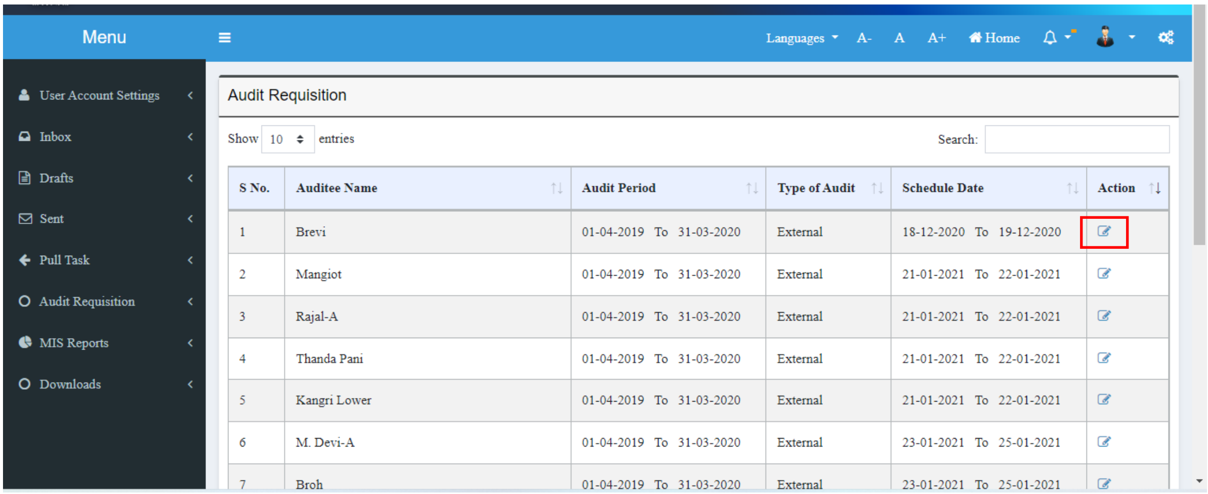


Case 2: How to Use Request requisition or how to send the request for documents?

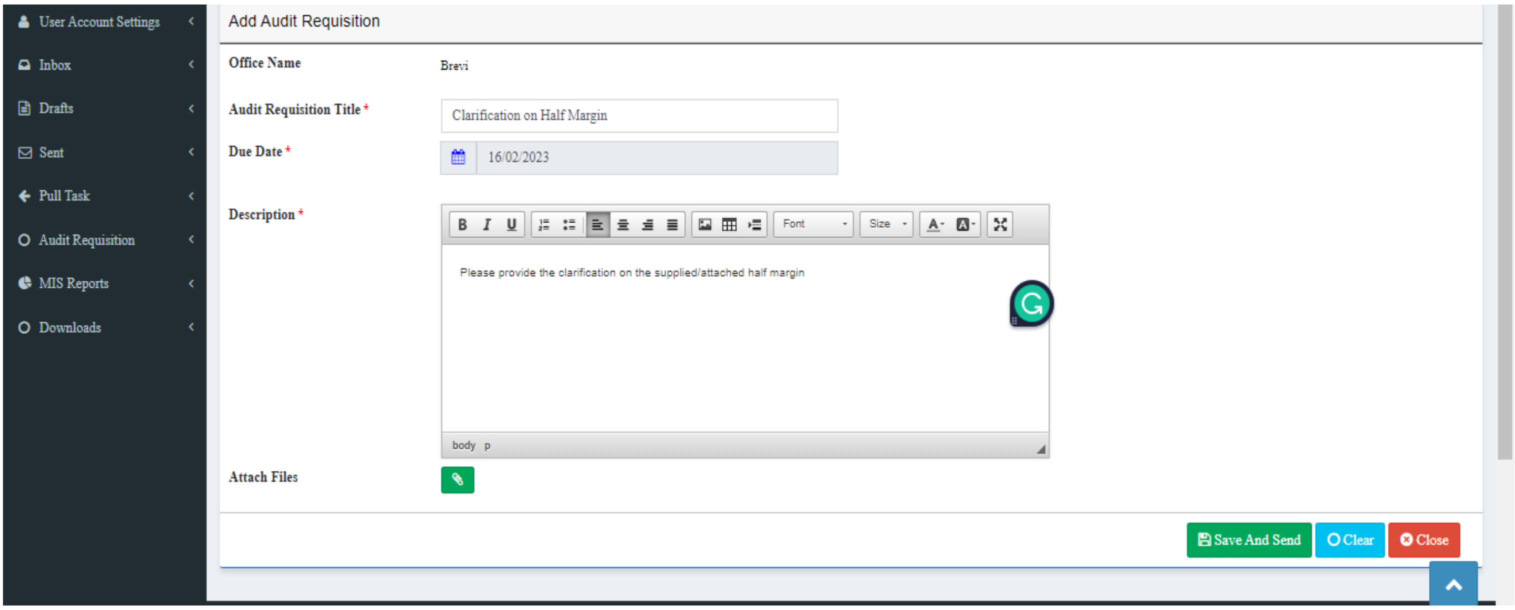
Step 1: Login to the user account assigned with Request Requisition role as shown in the below screenshot and click on ‘ADD’.



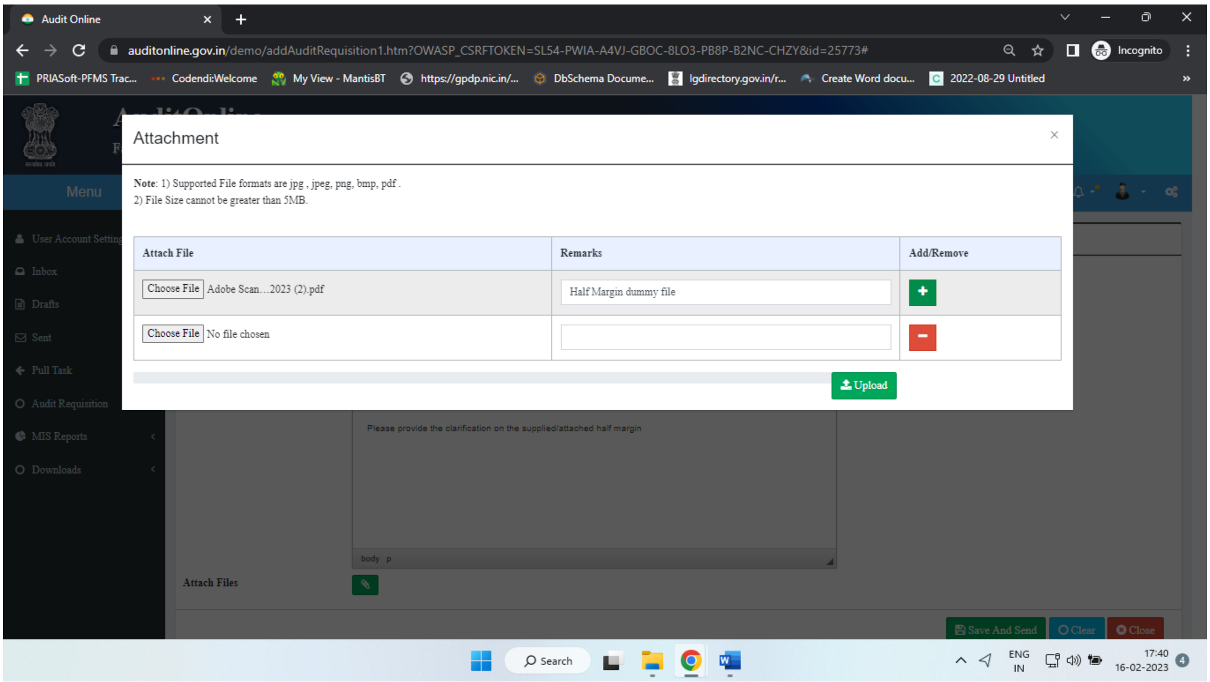
Step 2: All the panchayats assigned to that user shall be made available as a list and the user may choose to send the request to any of the Auditee entity as shown below:



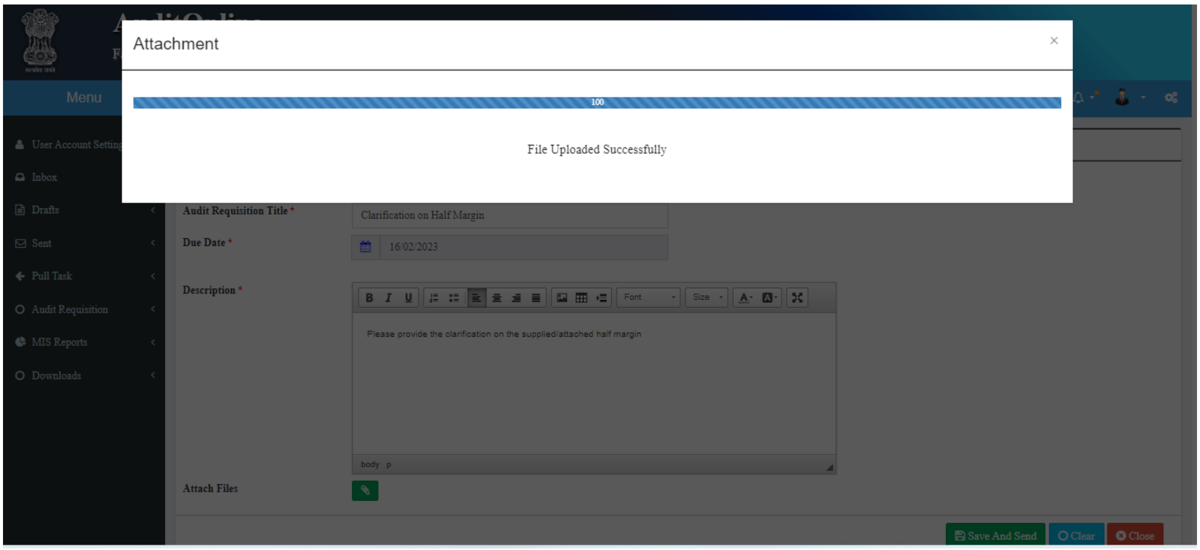
Step 3: After clicking action button the request requisition form will appear as shown below, now it is required to fill in the mandatory details and also the provision to attach the files is provided (can be seen in the series of screenshot below):



Screenshot 1 (Fill the mandatory fields in the form)

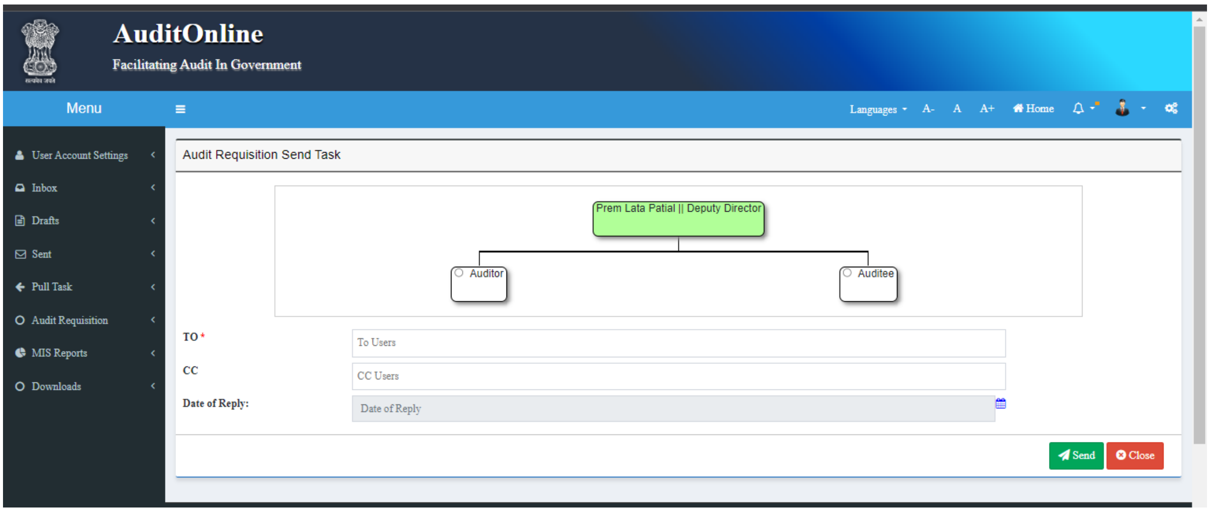


Screenshot 2- (provision to upload files as an attachment)

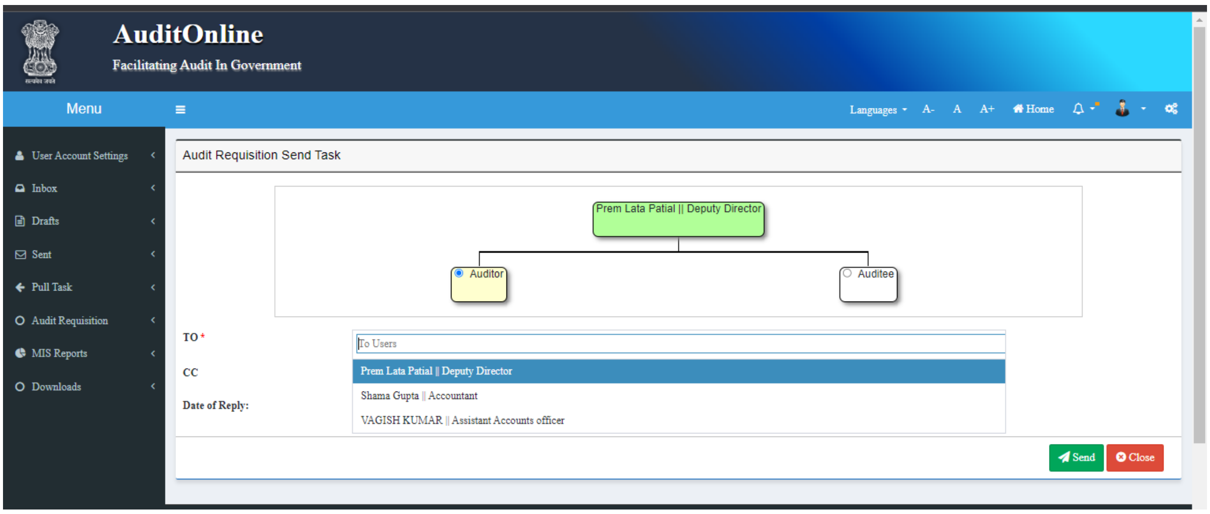


Screenshot 3: (File uploaded successfully message and close the alert)

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)

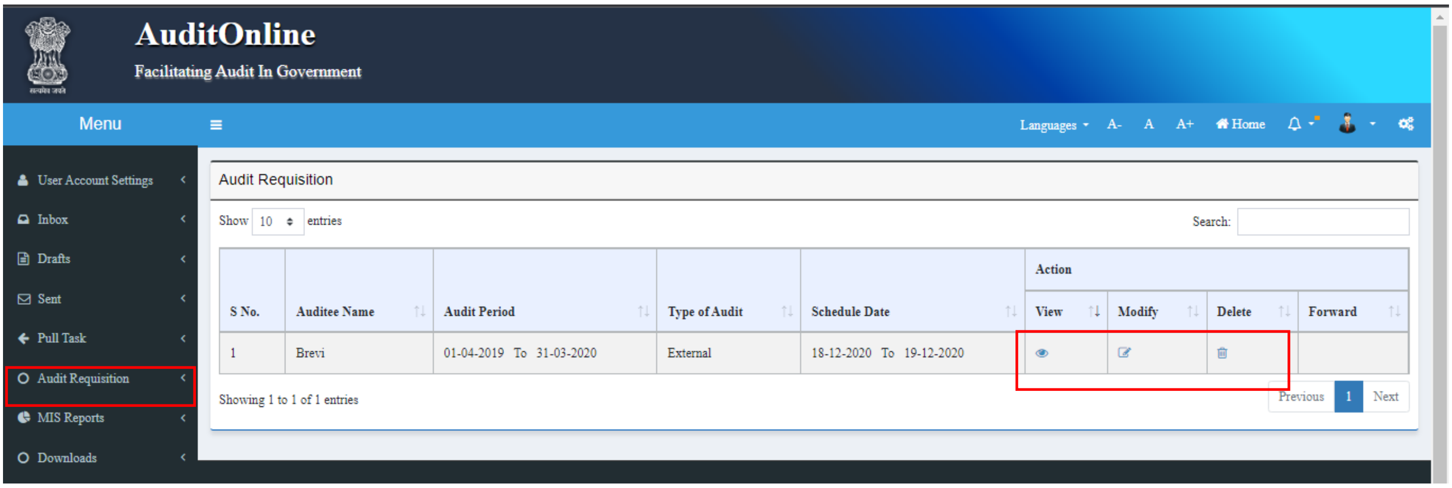


Step 5: Bases on the choice made as shown below the name of the person shall appear along with the designation, you may choose one in case of multiple names appear in the drop down and may click on 'SEND' button to proceed.



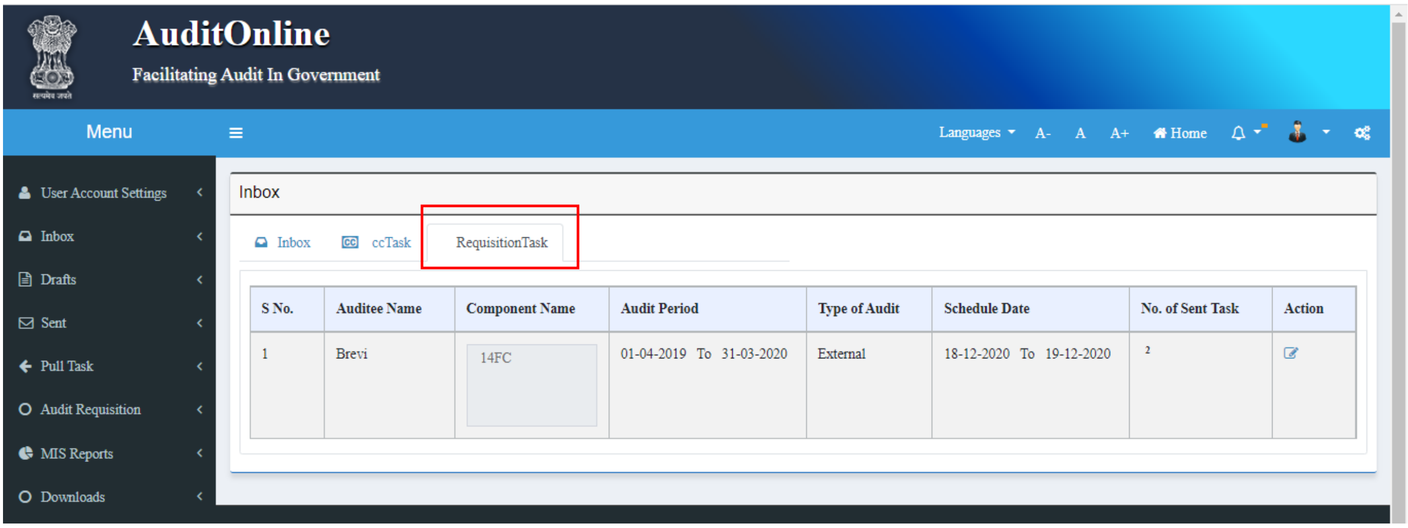
Case 3: How to manage documents request made through Request requisition module?

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.

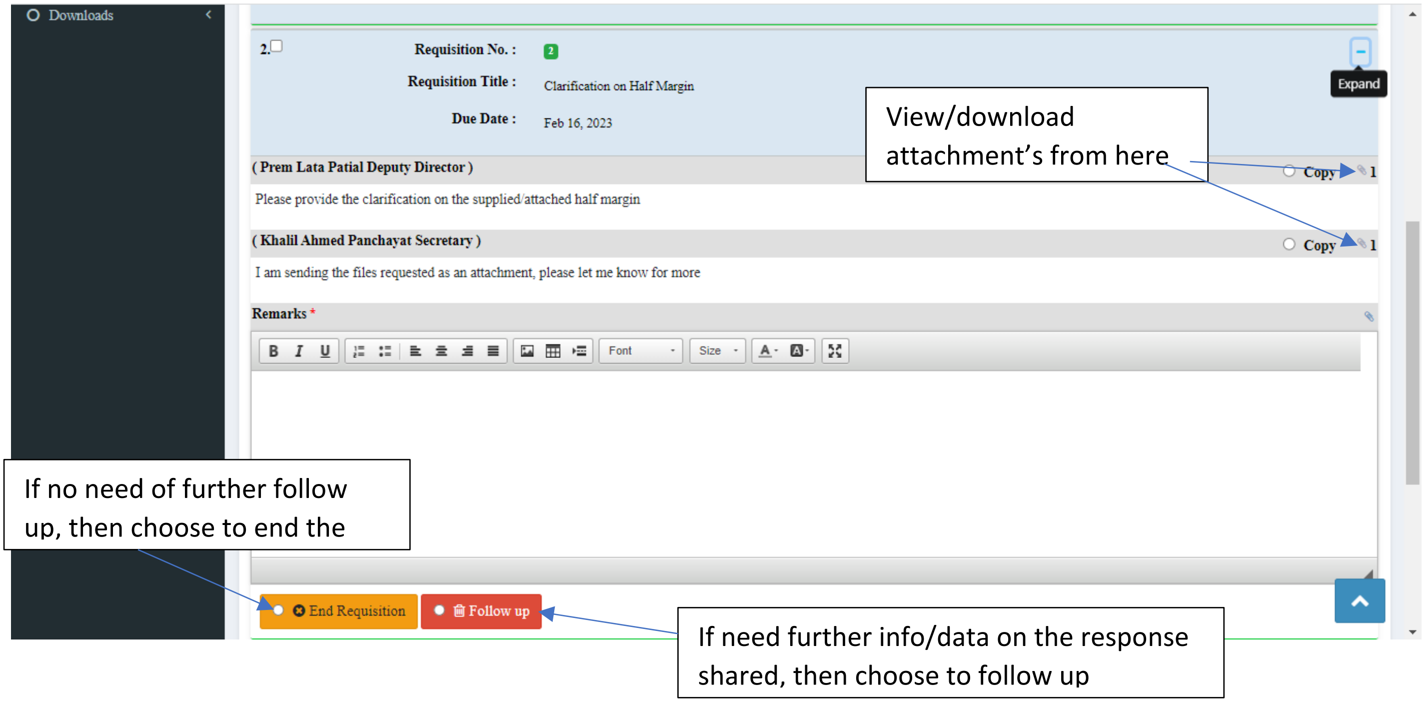


Case 4: Where to check the requested documents received from Auditee side through Request requisition module?

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



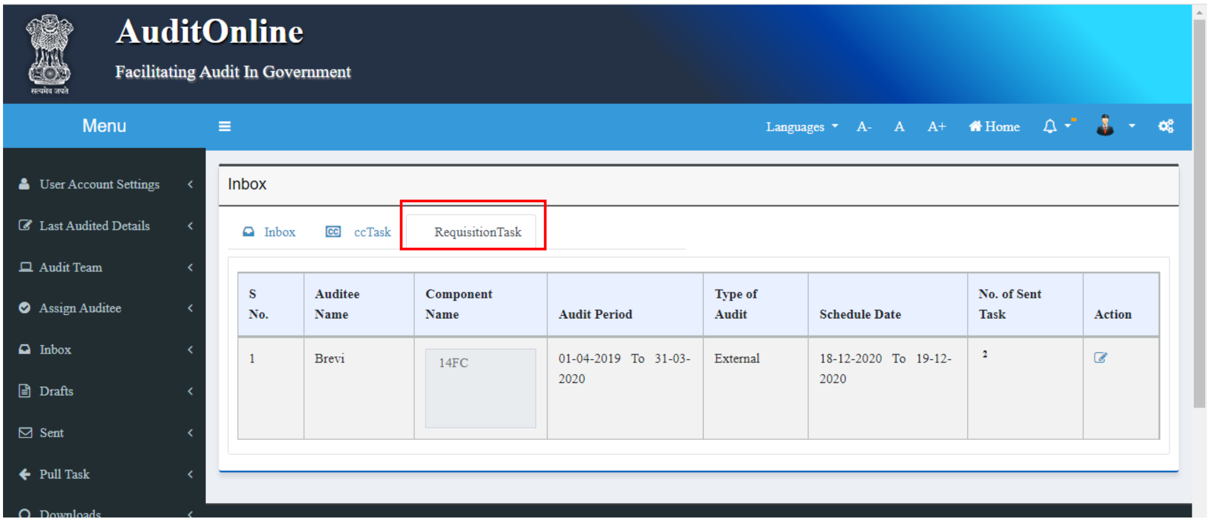
Step 2: Click on action button to view the trail of communication exchanged and responses shared by the audited authority as shown below:



AUDITED AUTHORITY CASES

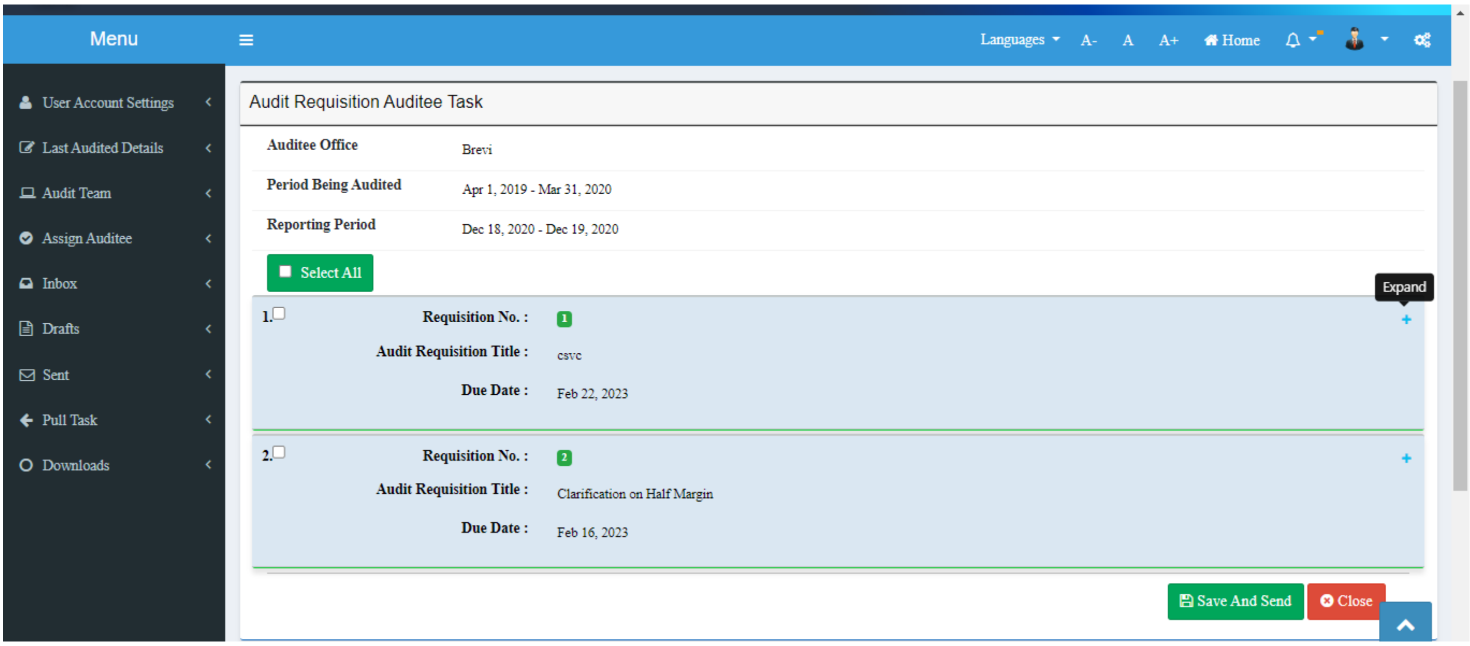
Case 1: How to check for a document request requisition made from Auditing authority?

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:

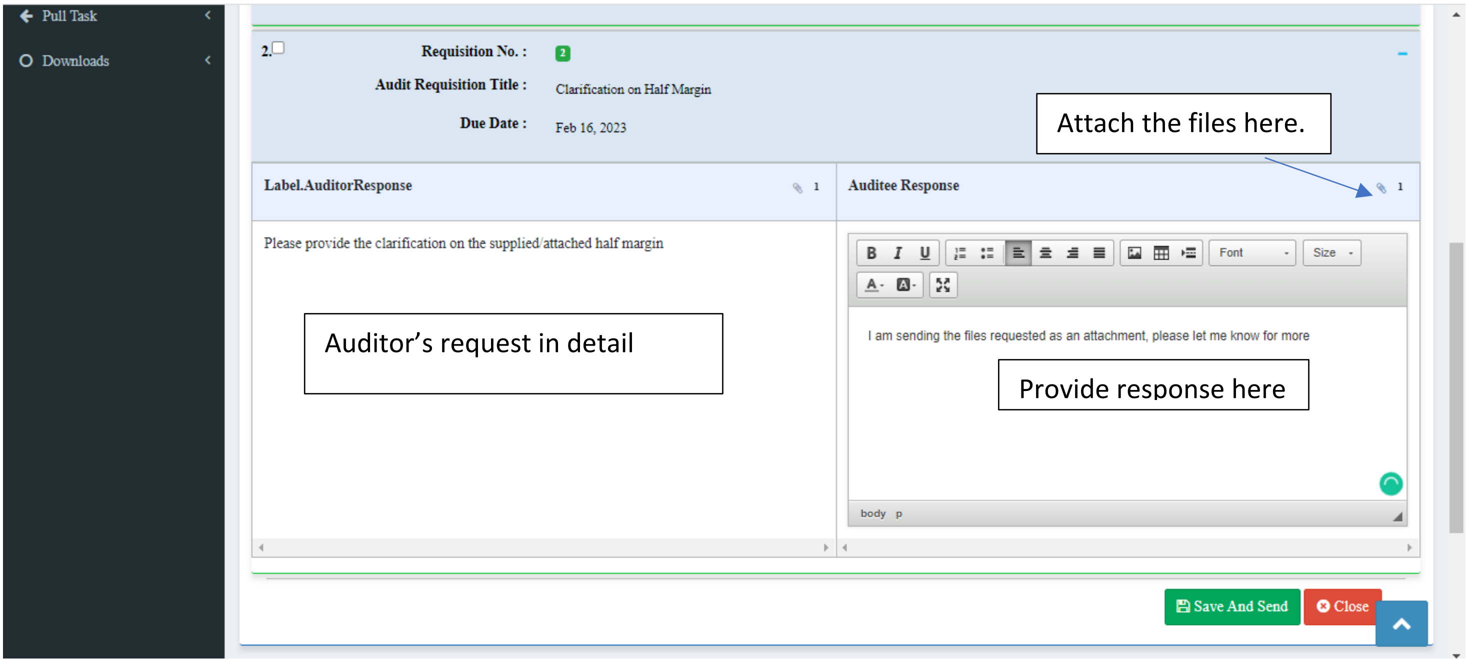


Case 2: How to provide/reply to the documents requested by an Auditing authority?

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,



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: