

# Create an Internal Audit Project

Last Modified on 09/12/2025 2:16 pm EDT

## Overview

An **Internal Audit Project** allows you to track the progress of your audit and aspects of the organization being audited.

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## User Account Requirements

The user account you use to log into Resolver must be added to the Internal Audit Team user group.

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## Required Information/Setup

Before adding an **Internal Audit Project**, you must have the following elements set up.

You also need to ensure that the user you are using to log into Resolver is part of the **Internal Audit Team User Group**. Please follow the link below for instructions on **Creating a User Group** and **Adding a User to a User Group** :

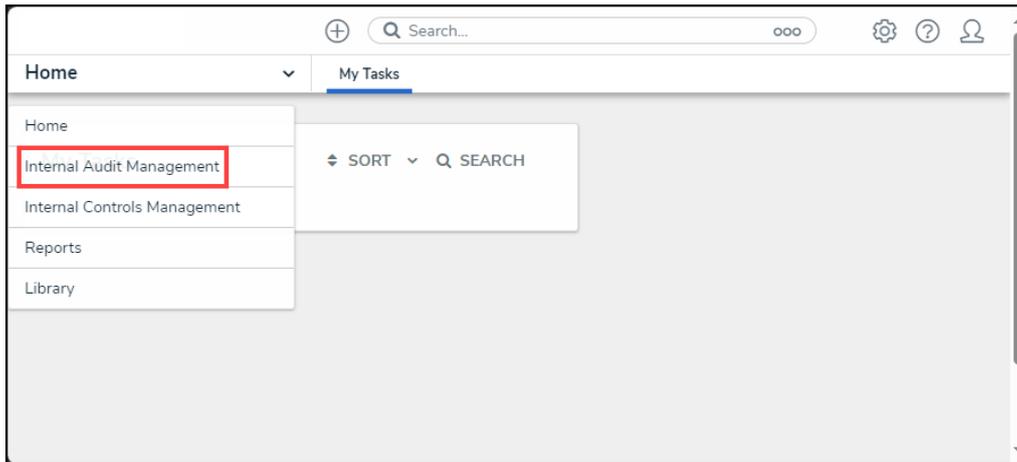
- [Creating a New User Group](#)
- [Adding a User to a User Group](#)

Before creating an **Internal Audit Project**, create an Audit Plan to help organize the Scope of the Internal Audit Project.

- [Create an Audit Plan](#)
  - [Activating an Audit Plan](#)
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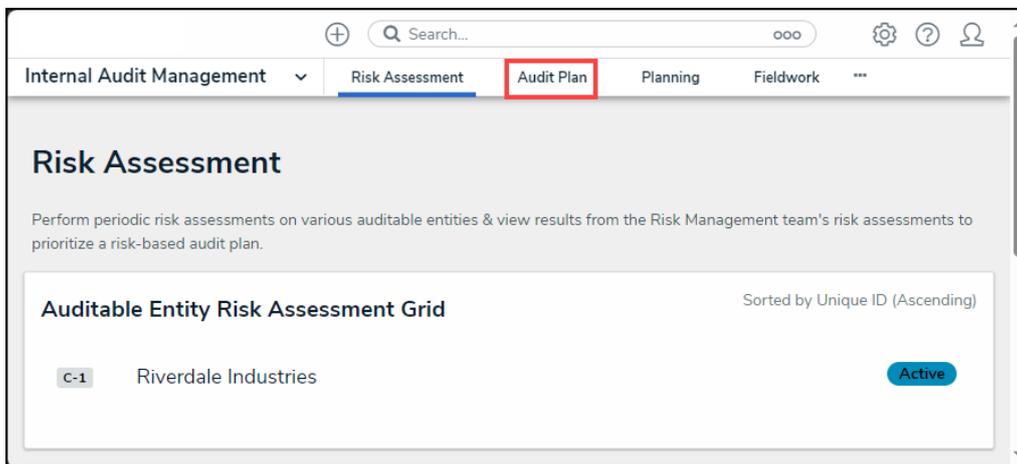
## Navigation

1. From the **Resolver Home** screen, click the **Home** dropdown and select the **Internal Audit Management** link.



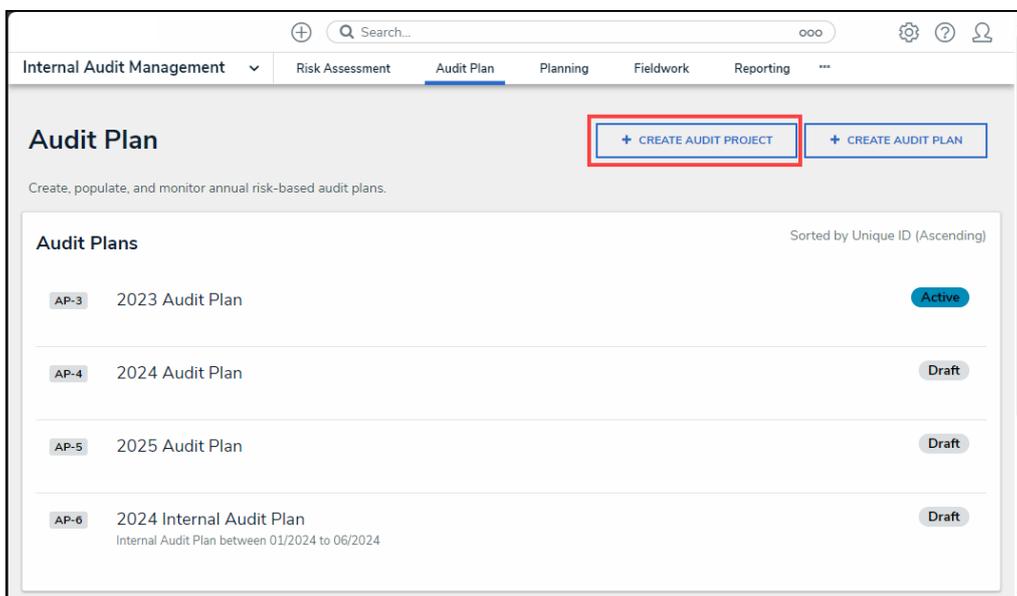
*Home Drop-Down*

- From the **Risk Assessment** screen, click on the **Audit Plan** tab.



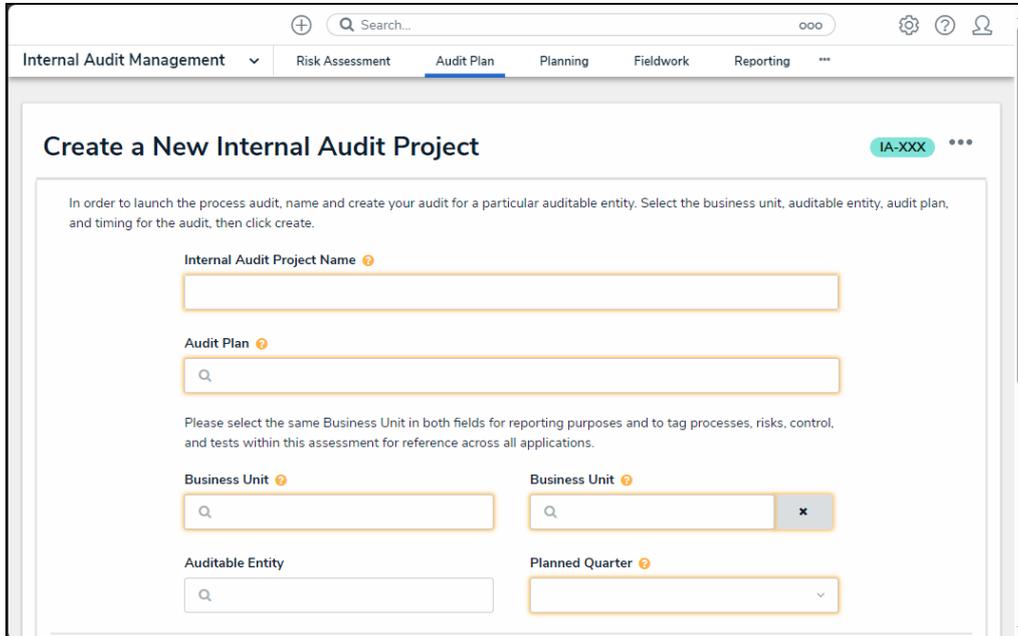
*Audit Plan Tab*

- From the **Audit Plan** screen, click the **Create Audit Project** button.



## Create an Internal Audit Project

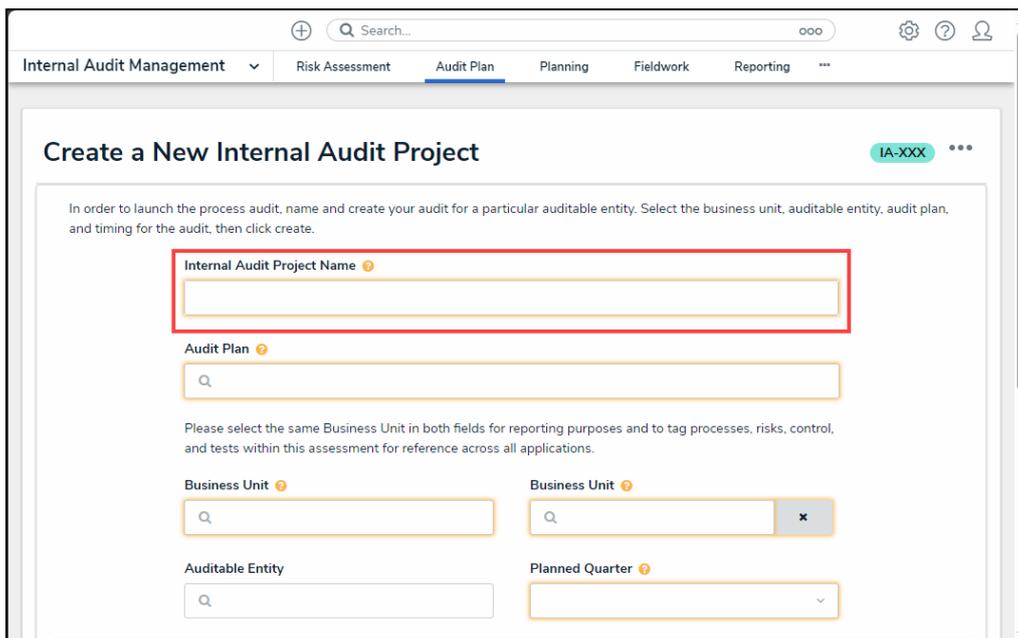
1. The **Create a New Internal Audit Project** screen will appear.



The screenshot shows the 'Create a New Internal Audit Project' form within the Resolver system. The form is titled 'Create a New Internal Audit Project' and includes a sub-header 'IA-XXX'. Below the title, there is a brief instruction: 'In order to launch the process audit, name and create your audit for a particular auditable entity. Select the business unit, auditable entity, audit plan, and timing for the audit, then click create.' The form contains several input fields: 'Internal Audit Project Name' (a text box), 'Audit Plan' (a search box), 'Business Unit' (two search boxes), 'Auditable Entity' (a search box), and 'Planned Quarter' (a dropdown menu). The 'Internal Audit Project Name' field is highlighted with a red border in the subsequent image.

Create a New Internal Project Form

2. On the **Create a New Internal Audit Project** form, enter the name of the internal audit project in the **Internal Audit Project Name** field. The **Internal Audit Project Name** is used to identify the Audit Project throughout the system and for historical purposes.



This screenshot is identical to the previous one, but the 'Internal Audit Project Name' text box is highlighted with a red border to indicate where the user should enter the project name.

Internal Audit Project Name Field

3. Enter a keyword in the **Audit Plan** field and click on an **Audit Plan** to add it.
  - To add multiple **Audit Plans**, enter another keyword in the **Audit Plan** field and click on the **Audit Plan** to add it.

The screenshot shows the 'Create a New Internal Audit Project' form. The 'Audit Plan' field is highlighted with a red box. It contains a search input with the text 'Inte' and a dropdown menu showing '2024 Internal Audit Plan Library'. Below the dropdown, there is a note: 'and tests within this assessment for reference across all applications.' The 'Business Unit' field has an 'x' button to the right of the input.

*Audit Plan Field*



**Tip:**

Remove a field entry from the Create a New Internal Audit Project form (e.g., **Audit Plan, Business Unit, Auditable Entity, etc.**) by clicking on the **x** to the right of the entry's name.

*The Business Unit fields can be deleted while on the Create a New Internal Audit Project form. If changes need to be made to the Business Unit fields, Resolver recommends deleting the Internal Audit Project and creating a new Internal Audit Project using the correct Business Units.*

The close-up shows the 'Audit Plan' field with a search input containing '2022 Internal Audit Plan'. A red box highlights the 'x' button to the right of the input, which is used to delete the entry.

*Click the X to Delete an Entry*

4. Enter a keyword in the **Business Unit** field and click on a **Business Unit** to add it to the project.
  - This **Business Unit** field creates a reporting connection to the assessment and allows

users to create assessment reports (reporting path Company>Business Unit>Assessment).

*Business Unit Field*

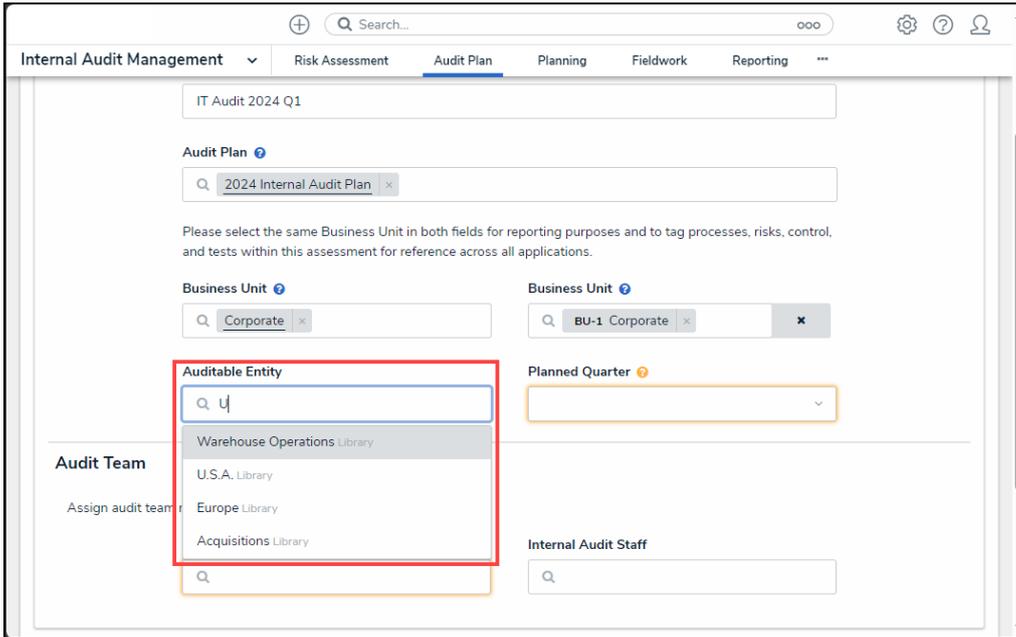
5. Enter the keyword you used in step 4 in the second **Business Unit** field and select the same **Business Unit** tag you used in the first **Business Unit** field.

- This **Business Unit** field is the assessment dimension, which tags assessment data to the selected **Business Unit**. This Tag appears next to the object throughout the system (global searches, views, relationship tables, etc.).

*Business Unit Tag*

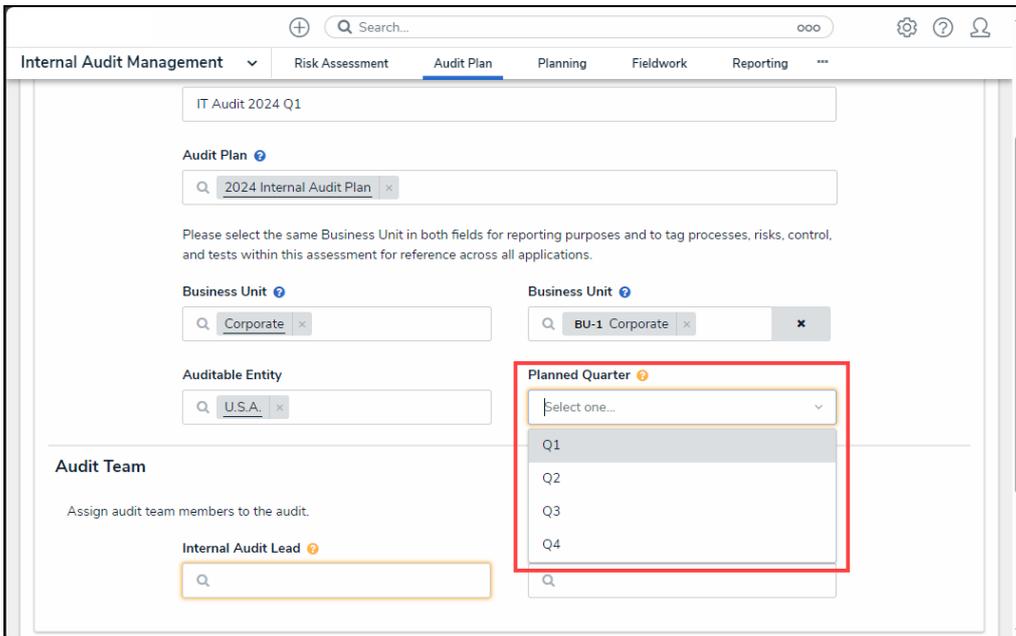
6. **(Optional)** Enter a keyword in the **Auditable Entity** field and click on an **Auditable Entity** to add it to the project.

- An **Auditable Entity** is an element (e.g., business unit, legal entity, office location, etc.) of an organization that can be audited. Auditable Entities make up an organization's **Auditable Universe**.
- To add multiple **Auditable Entities** to the project, enter another keyword in the **Auditable Entity** field and click on the **Auditable Entity** to add it to the project.



*Auditable Entity Dropdown Menu*

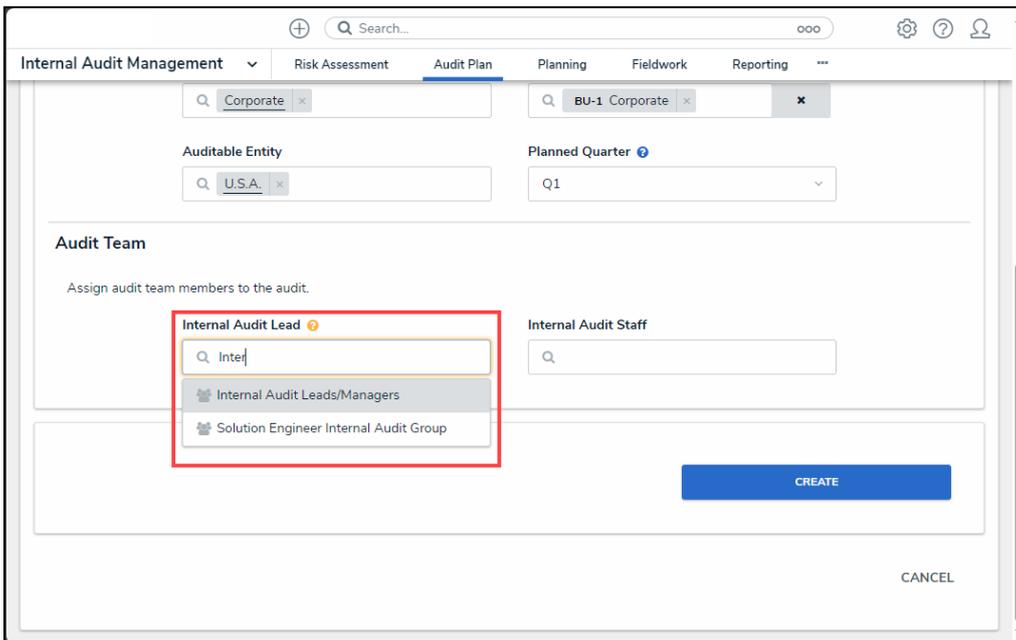
7. Select a yearly quarter (e.g., Q1, Q2, Q3, or Q4) from the **Planned Quarter** dropdown list. The quarter selected will indicate the time of year the audit will take place.



*Planned Quarter Dropdown Menu*

7. From the **Audit Team** section, enter an internal audit lead's name in the **Internal Audit Lead** field and select them from the dropdown list to assign them to the project.
  - An **Internal Audit Lead** manages individual audit projects, reviews tests, and progresses the audit from Planning to Fieldwork to Reporting.
  - To add multiple Internal Audit Leads to the project, enter their name in the **Internal**

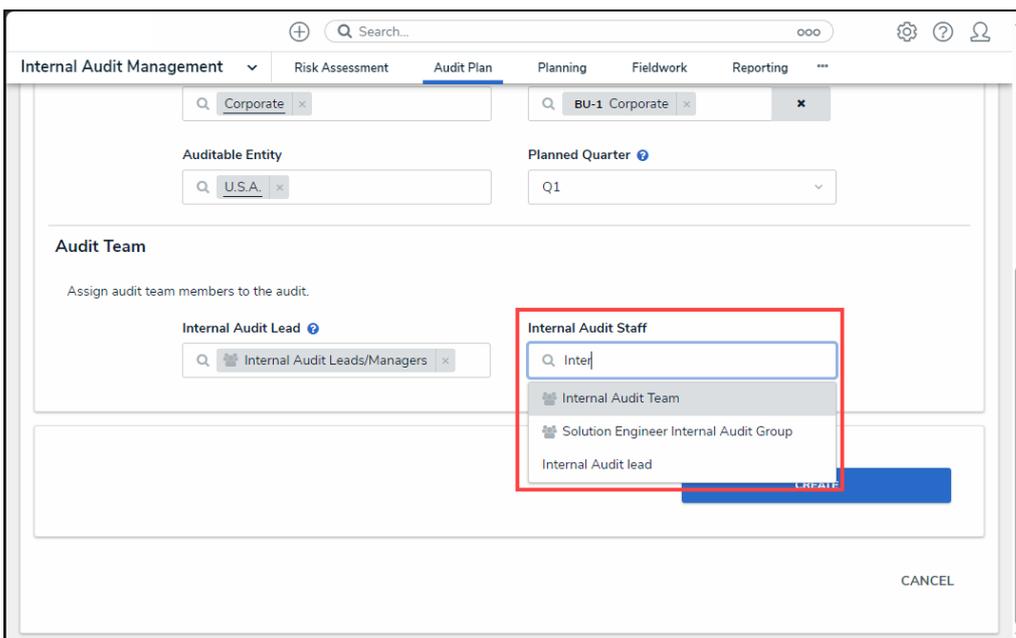
**Audit Lead** field and select them from the dropdown list.



*Internal Audit Lead Dropdown Menu*

9. Enter an internal audit staff member's name in the **Internal Audit Staff** field and select them from the dropdown list to assign them to the project.

- An **Internal Audit Staff** member performs tasks for individual audit projects.
- To add multiple internal audit staff to the project, enter their name in the **Internal Audit Staff** field and select them from the dropdown list.



*Internal Audit Staff Dropdown Menu*

10. Click the **Create** button to create the **Internal Audit Project**.

*Create Button*

10. You can edit the project and fill out further details regarding the audit (Audit Type, Budgeted Hours, Key Dates and Information, Define and Review Audit Scope) by clicking on the **Internal Audit Project** link on the **Pending Audits** section from the **Audit Plan** screen.

ID	Audit Title	Category	Status
IA-1	Operations Audit 2024 Q1	OPERATIONS	Not Started
IA-2	IT Audit 2024	CORPORATE	Not Started
IA-3	IT Audit 2024 Q1	CORPORATE	Not Started

*Pending Internal Audit Project*