Adding an Existing Document Request to an Internal Audit Project

Last Modified on 05/15/2024 1:29 pm EDT

Overview

Users can use an existing document request to a control.

User Account Requirements

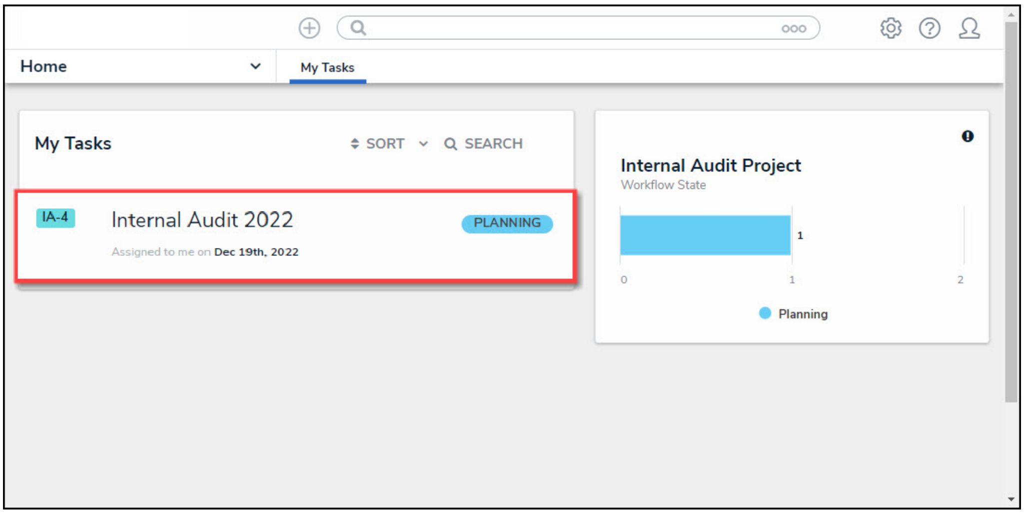
The user account used to log into Resolver must be added to either the Internal Audit Leads or Internal Audit Managers user group.

Required Information/Setup

For further information on how to scope an Internal Audit Project, please refer to the Define the Scope of an Internal Audit Project article.

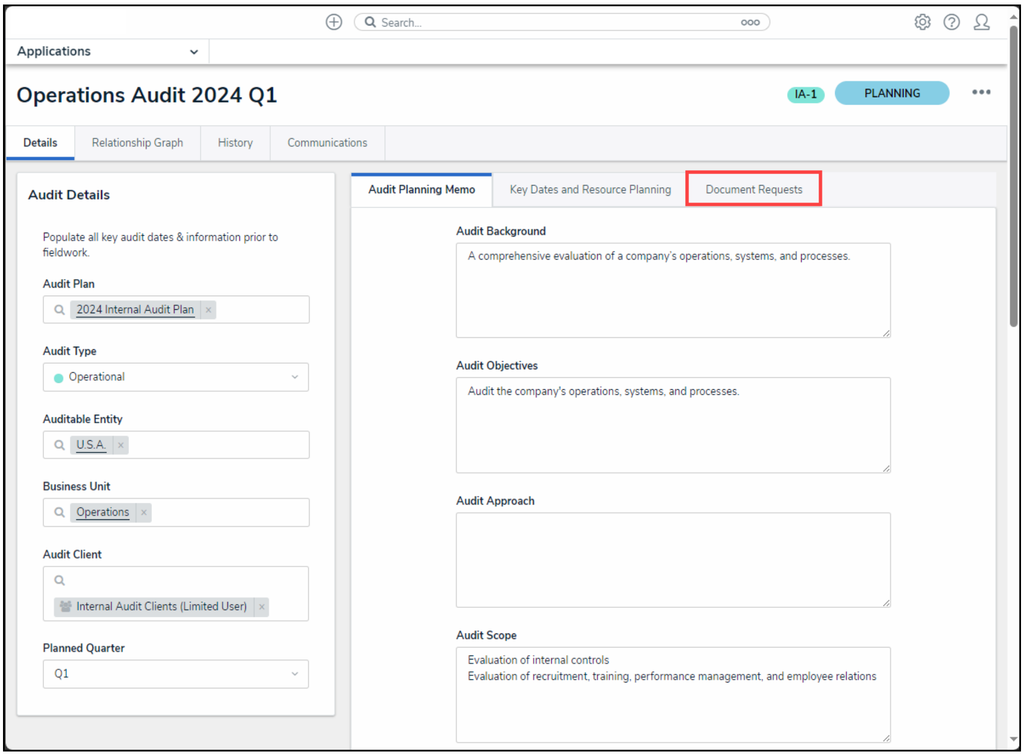
Navigation

1. From the ***Home*** screen, click on an **Internal Audit Project** in the **Planning** stage from the **My Tasks** section.



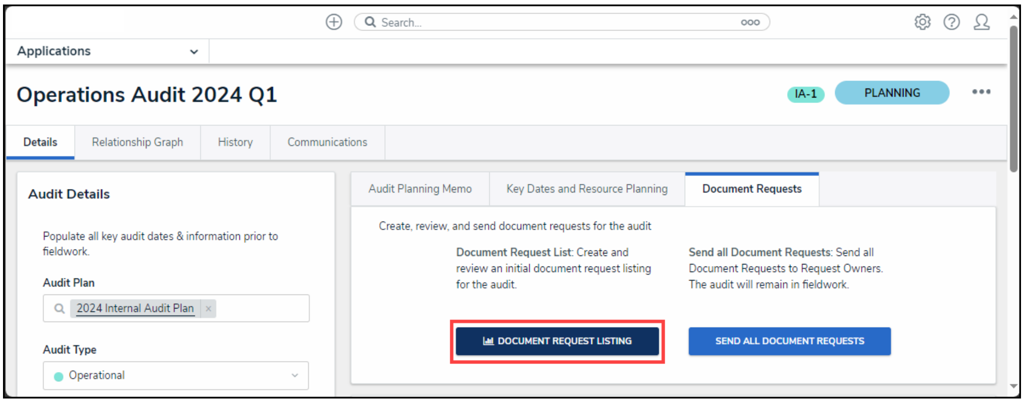
My Task - Internal Audit Project - Planning

2. From the ***Audit Details*** screen, click the **Document Request** tab.



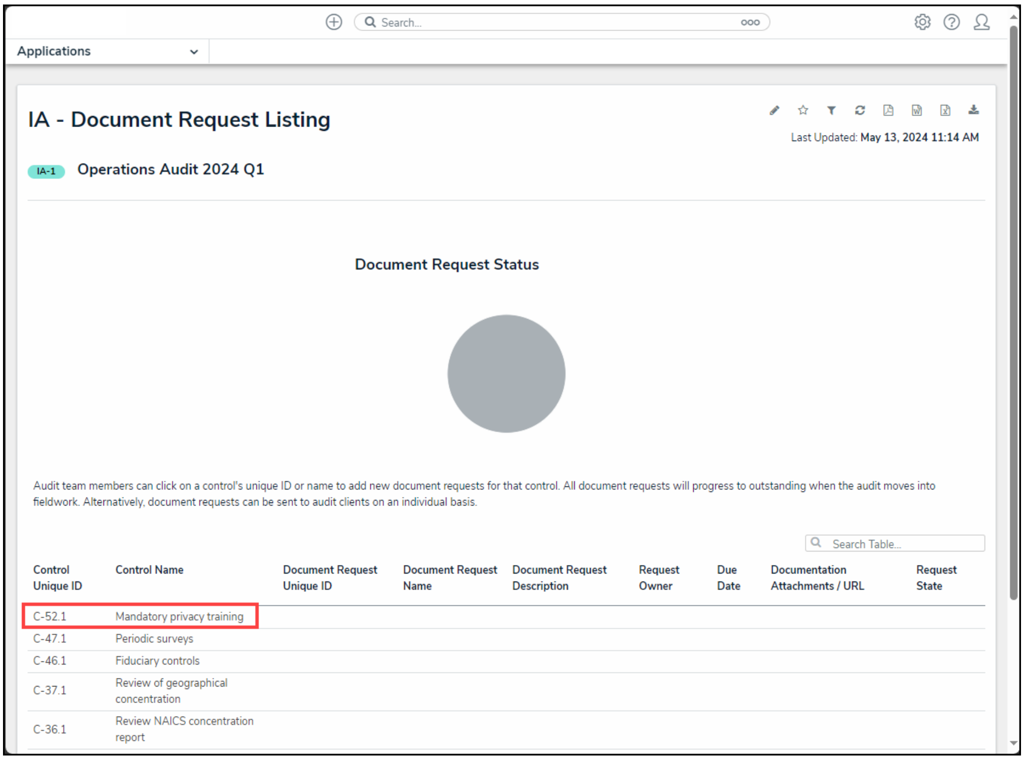
Document Request Listings Button

3. From the ***Documentation Request*** tab, click the **Document Request Listing** button to create and review document requests for the Internal Audit.



Document Request Listing Button

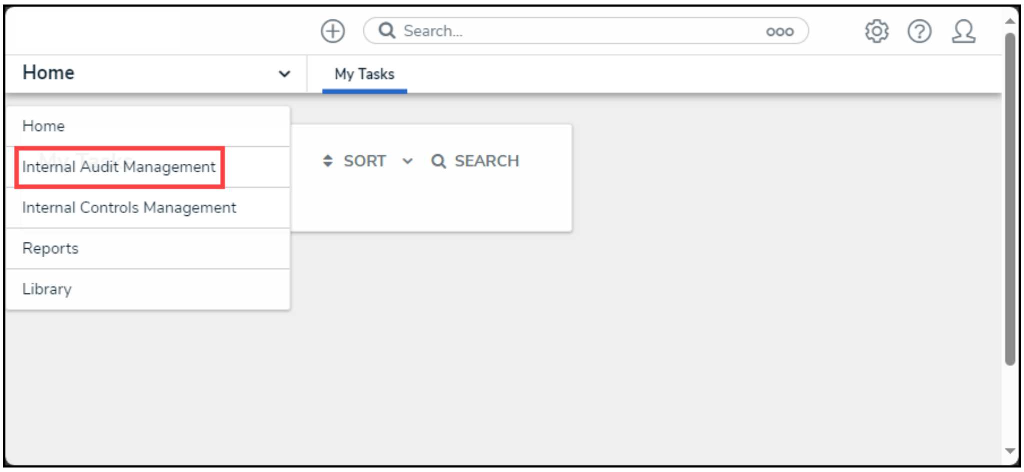
4. From the ***Document Request Listing*** screen, click a **Control**.



Click on a Control

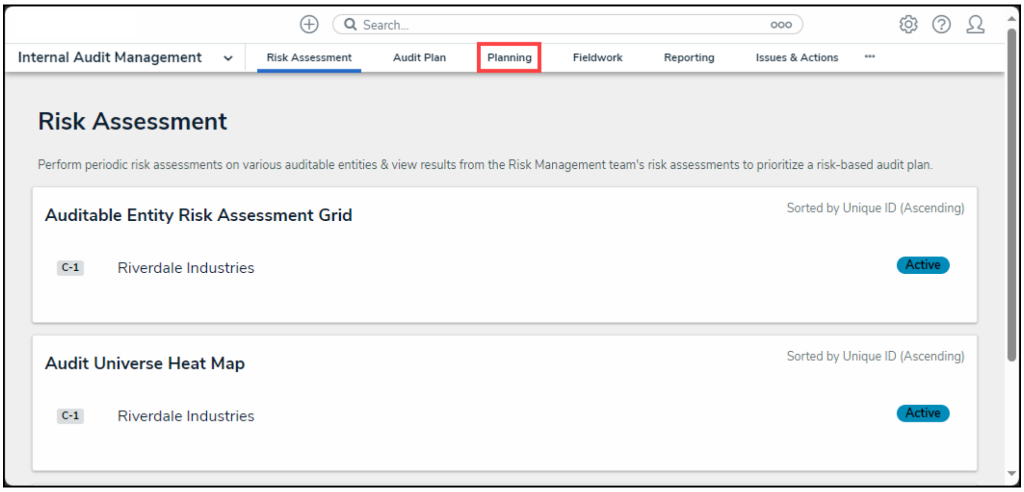
Alternate Navigation

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



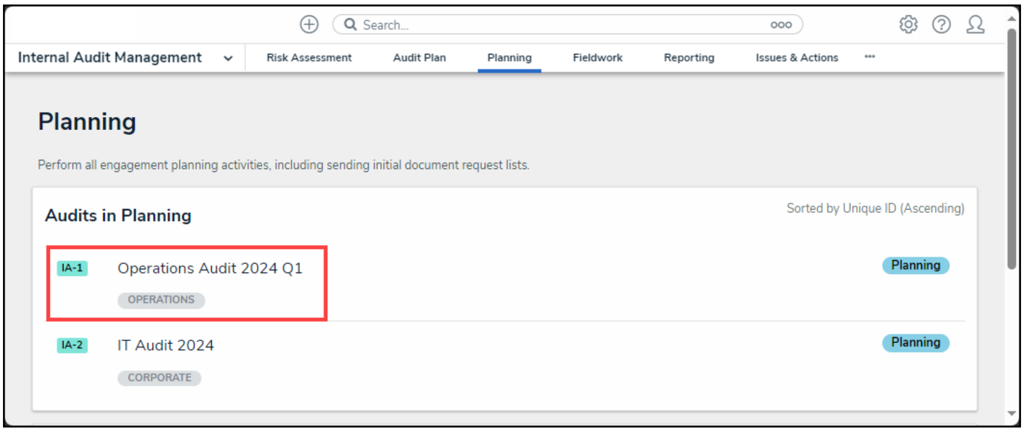
Home Drop-Down

2. From the ***Risk Assessment*** screen, click on the **Planning** tab.



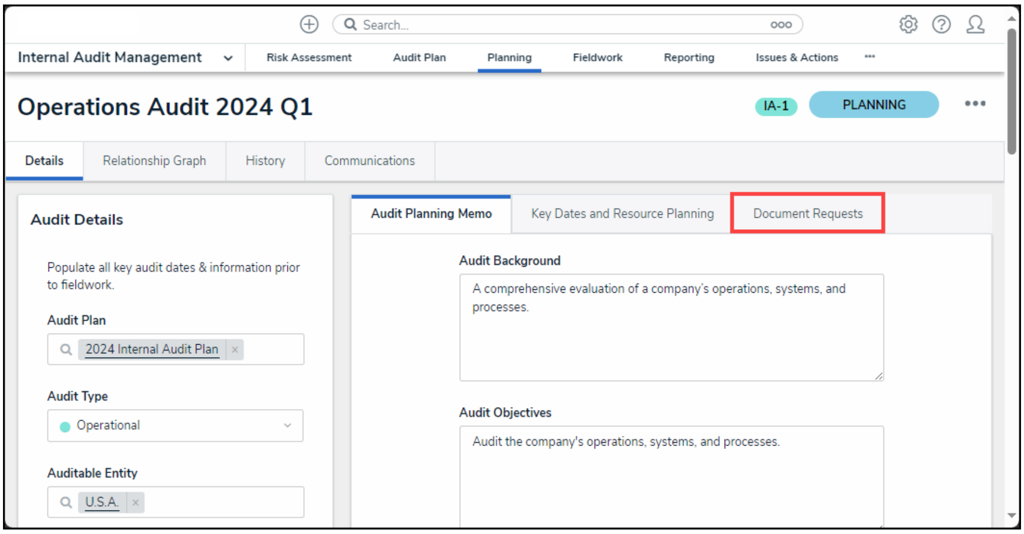
Planning Tab

3. From the ***Planning*** screen, click the **Create Audit Project** button.



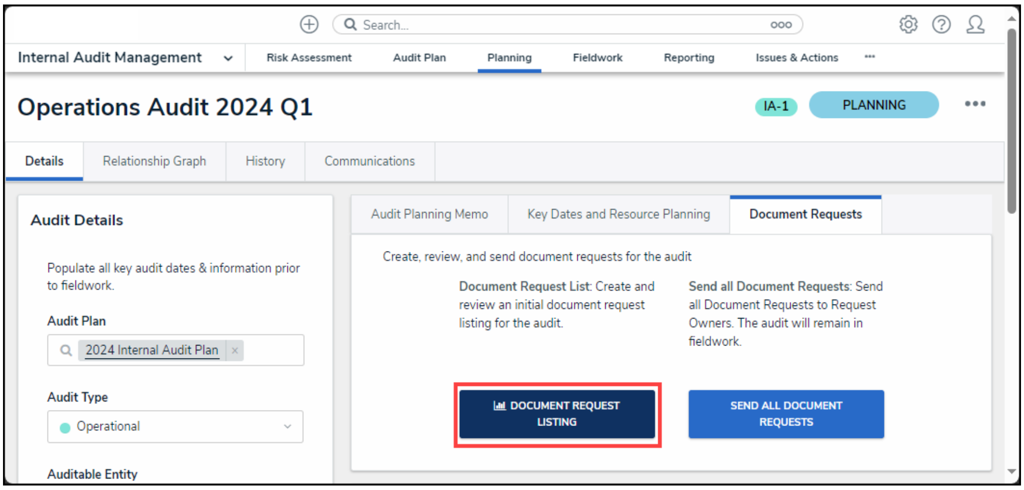
Create Audit Project Button

4. From the ***Intern Audit Project*** screen, click the ***Document Request*** tab.



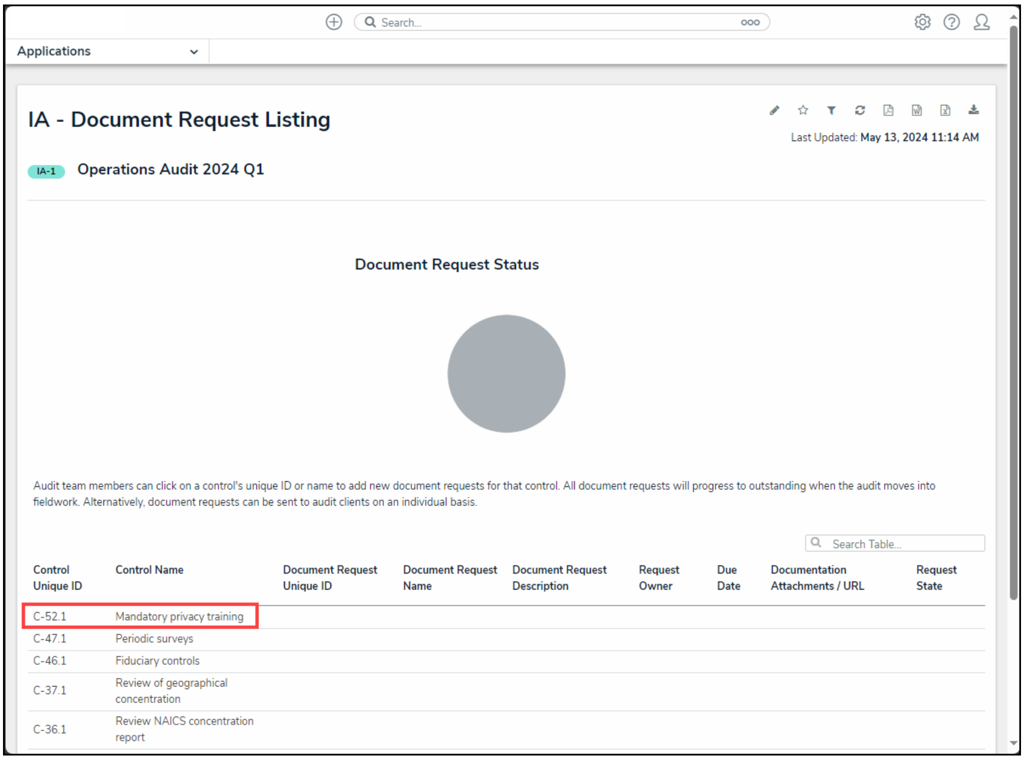
Document Request Tab

5. From the ***Documents Request*** tab, click the **Document Request Listing** button.



Document Request Listing Button

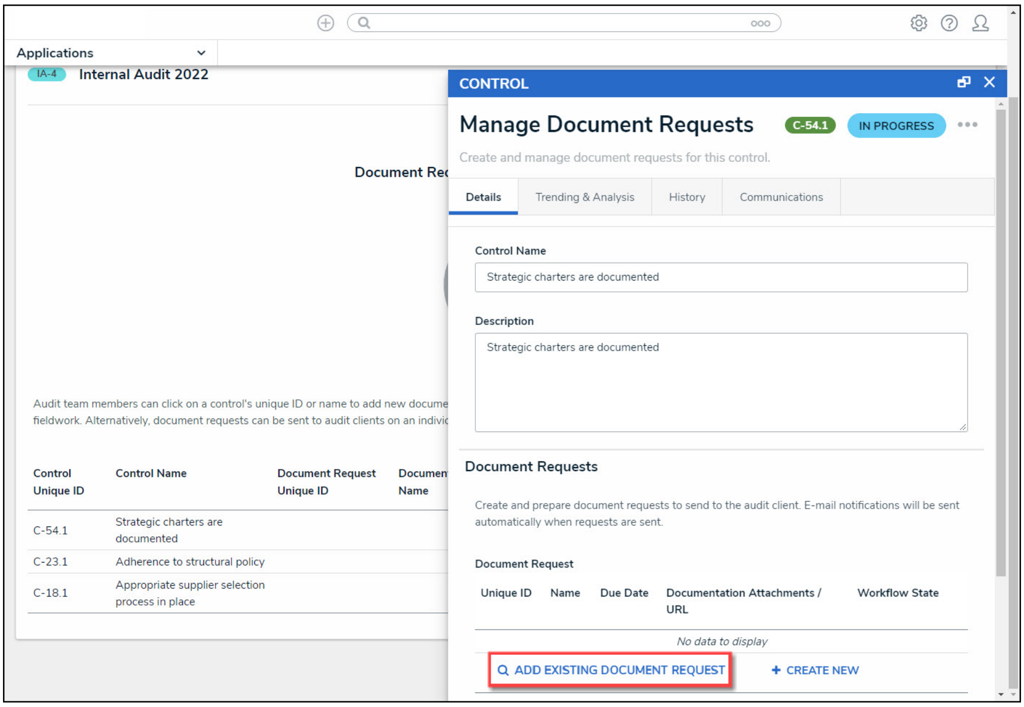
6. From the **Document Request Listing** screen, click a **Control**.



Click a Control

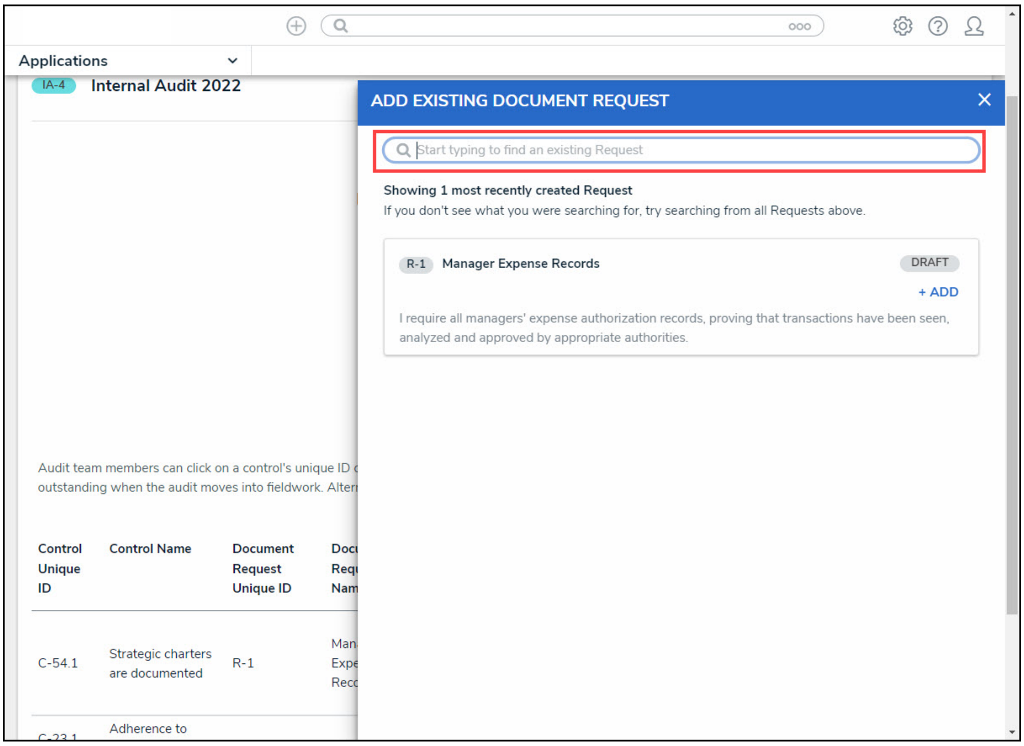
Adding an Existing Document Request

1. From the ***Manage Document Request*** pop-up, click the **Add Existing Document Request** button.



Add Existing Document Request Button

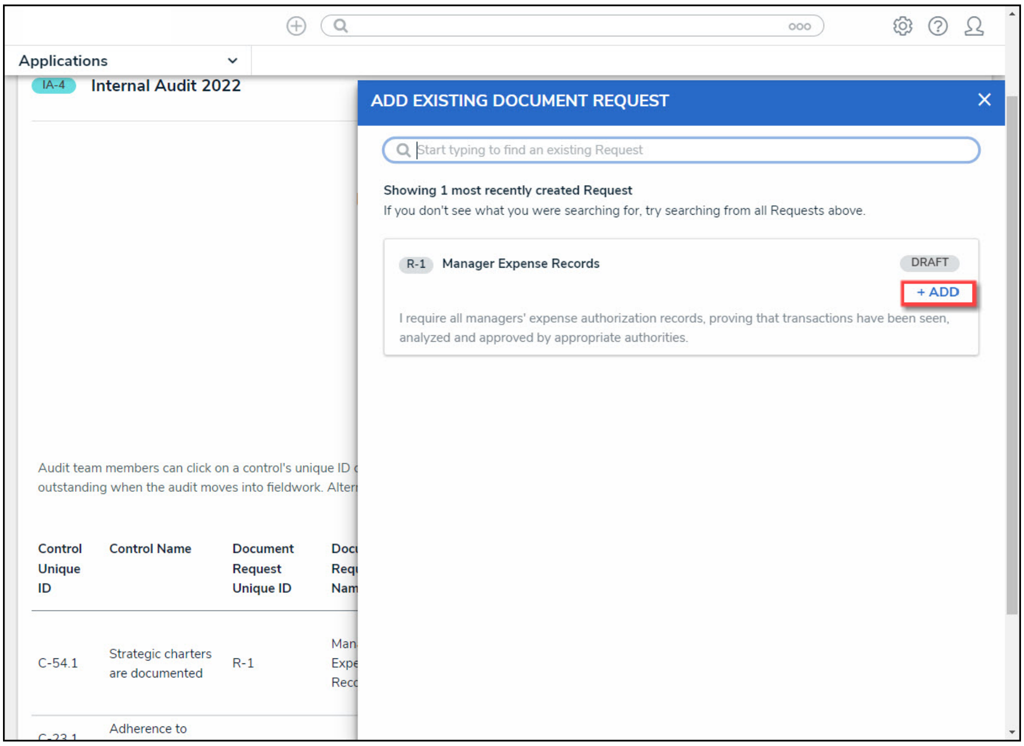
2. From the ***Add Existing Documentation Request*** pop-up, all recently created document requests are listed. Enter key search terms in the **Search** field if the document request you are looking for is not listed.



Search Field

3. When you have located the document request, click on the **+ ADD** link to add the

document request to the Control.



+ ADD Link