

# 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

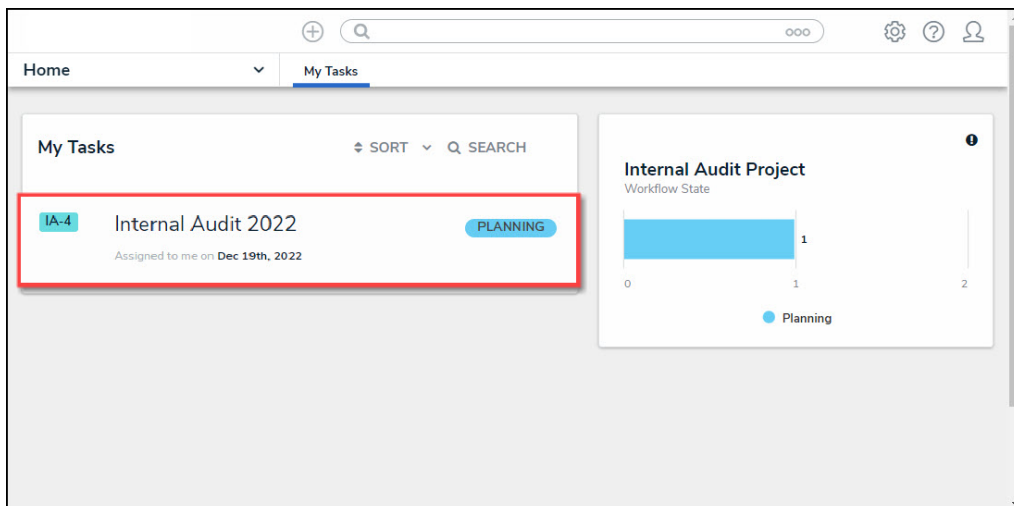
The user account used to log into Resolver must be added to either the Internal Audit Leads or Internal Audit Managers user group.

## 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.

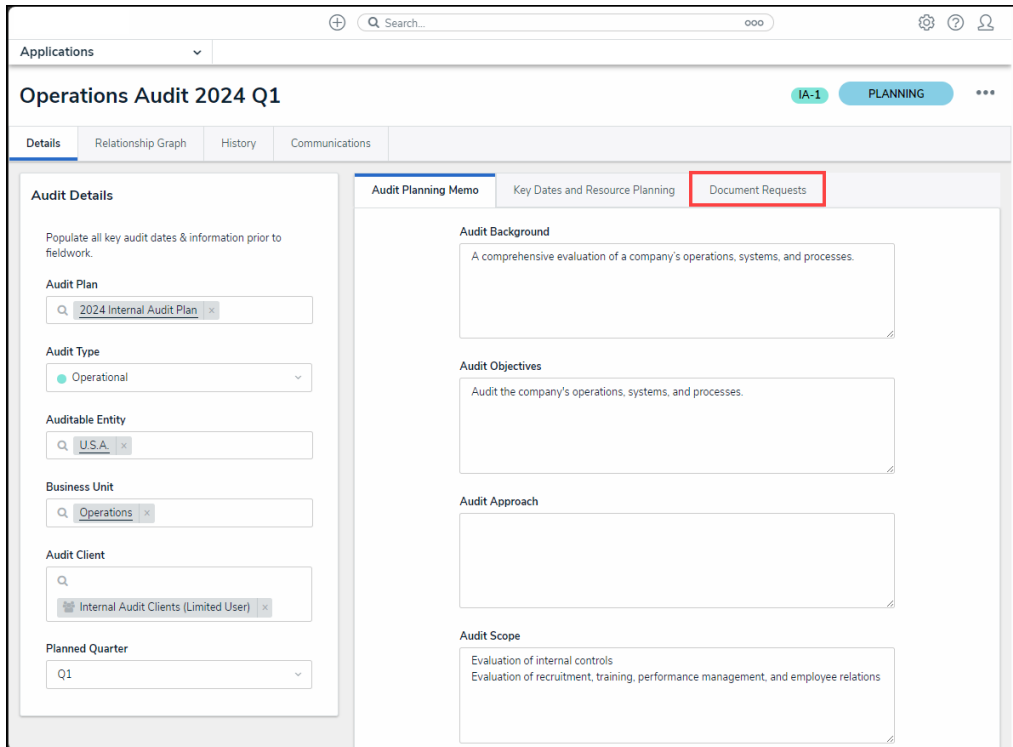
## Navigation

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



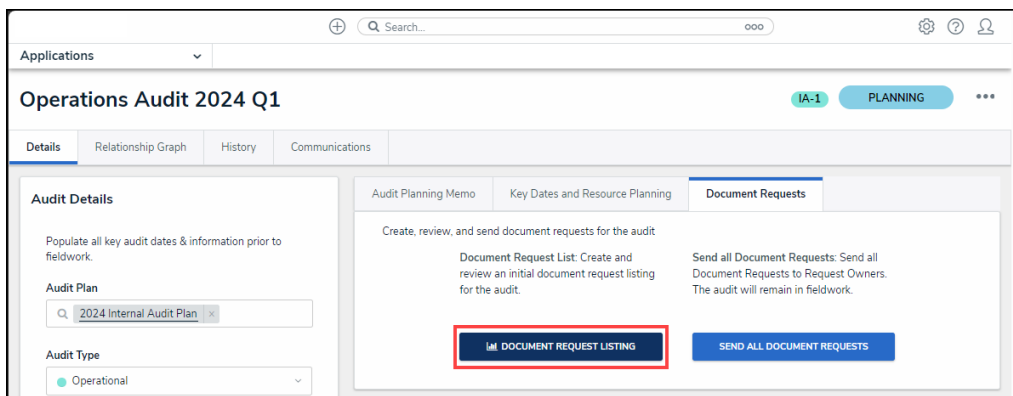
*My Task - Internal Audit Project - Planning*

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



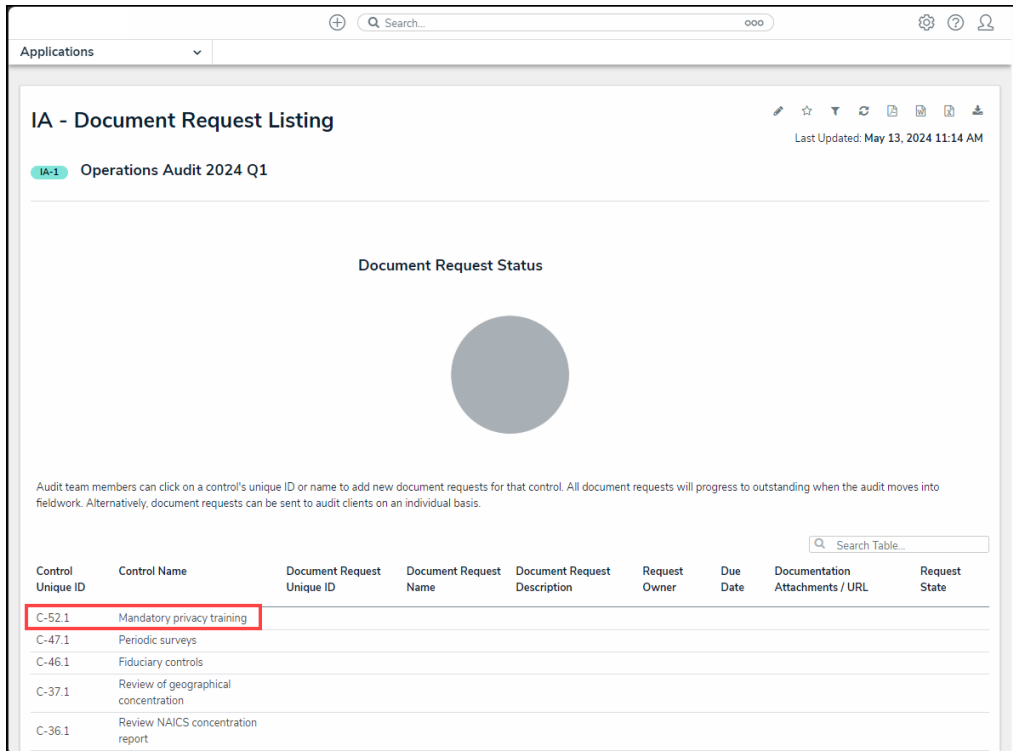
*Document Request Listings Button*

- 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*

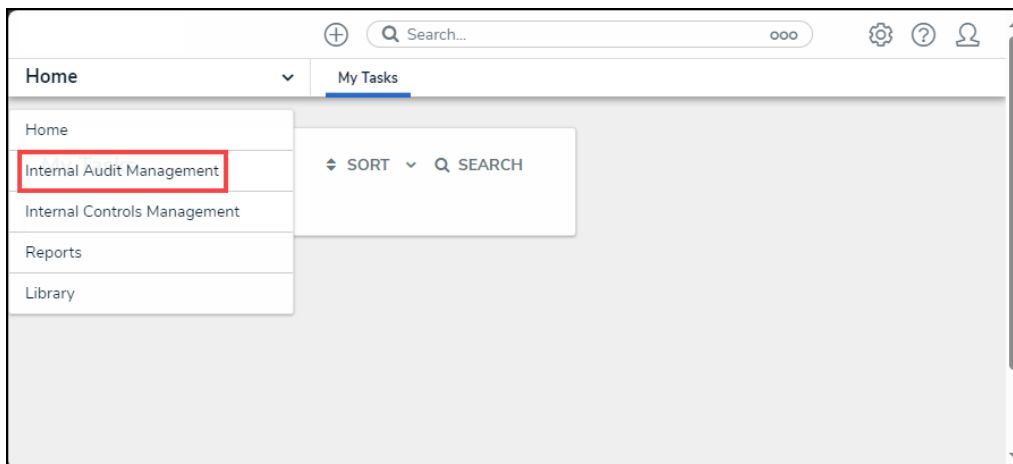
- From the **Document Request Listing** screen, click a **Control**.



*Click on a Control*

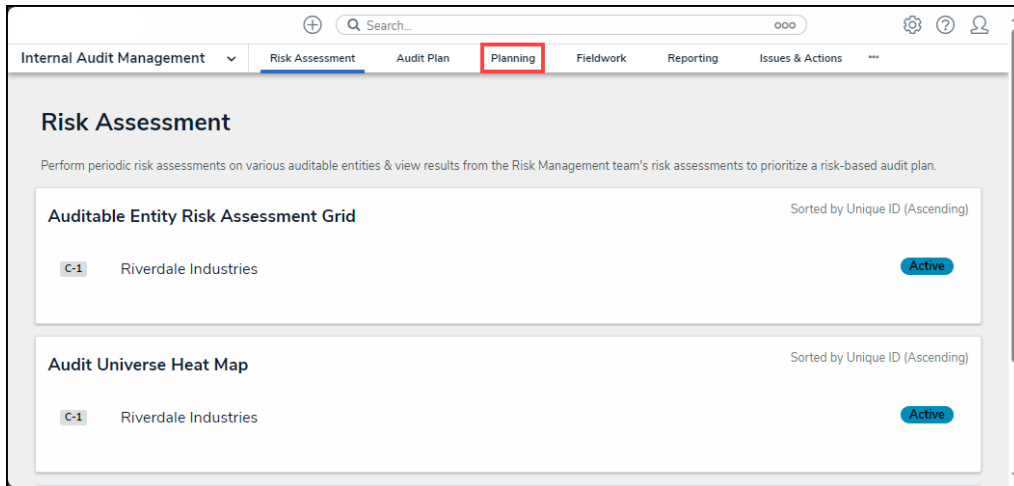
## Alternate Navigation

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



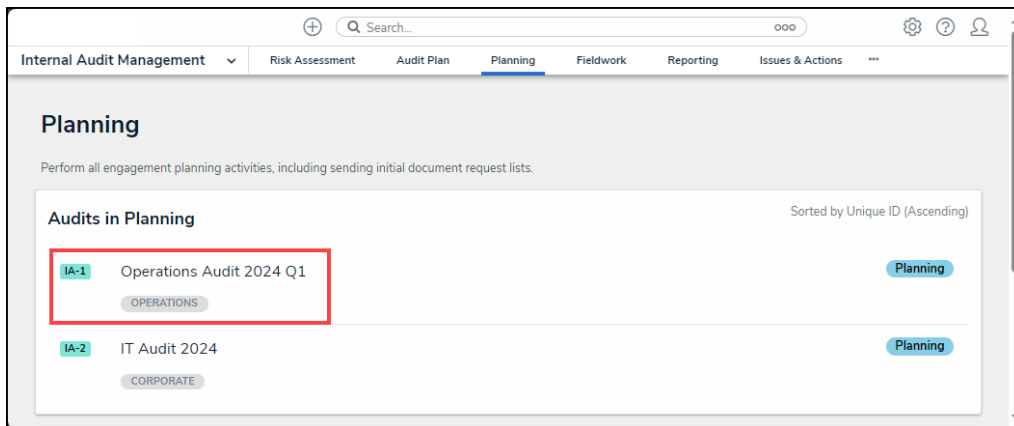
*Home Drop-Down*

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



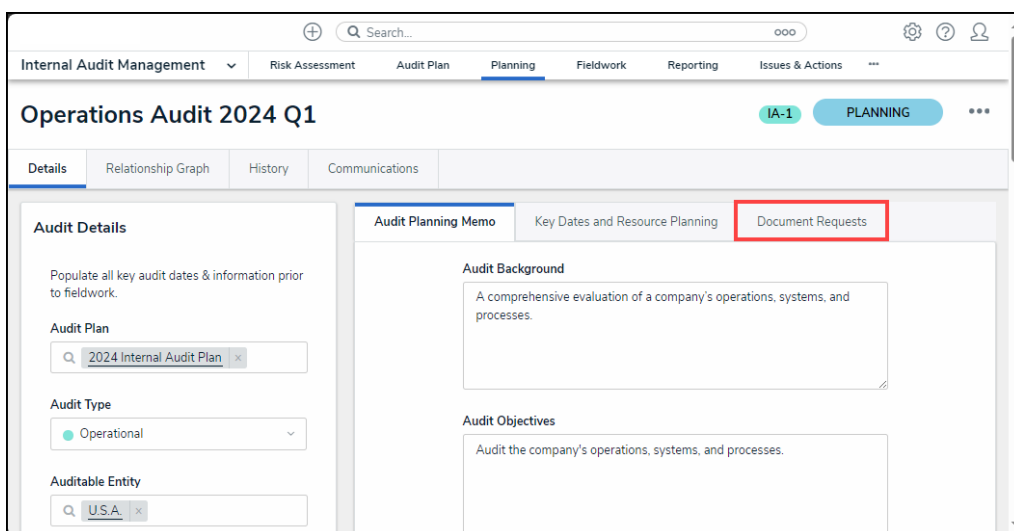
*Planning Tab*

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



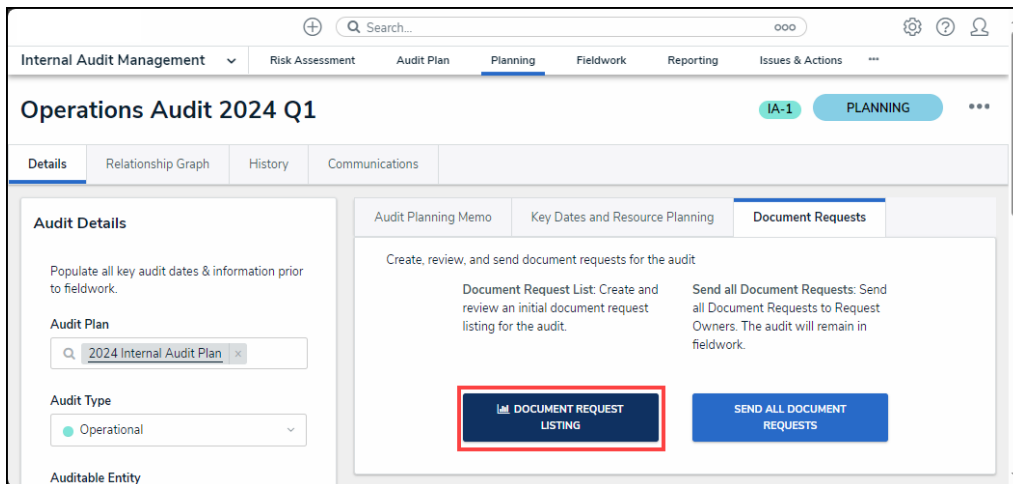
*Create Audit Project Button*

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



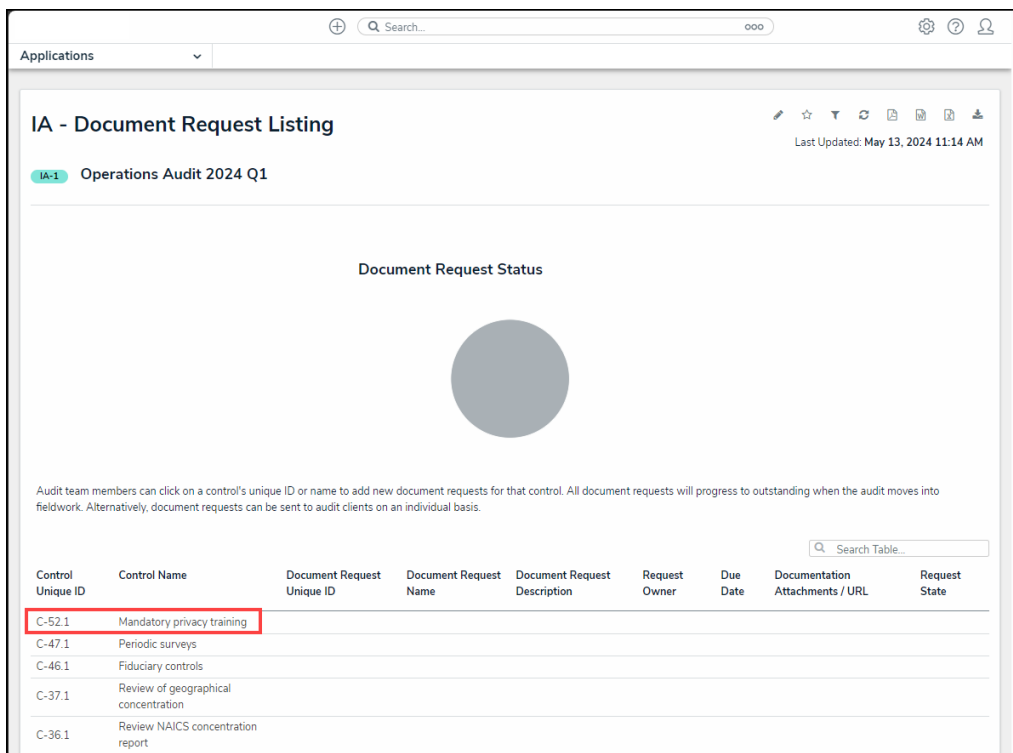
*Document Request Tab*

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



*Document Request Listing Button*

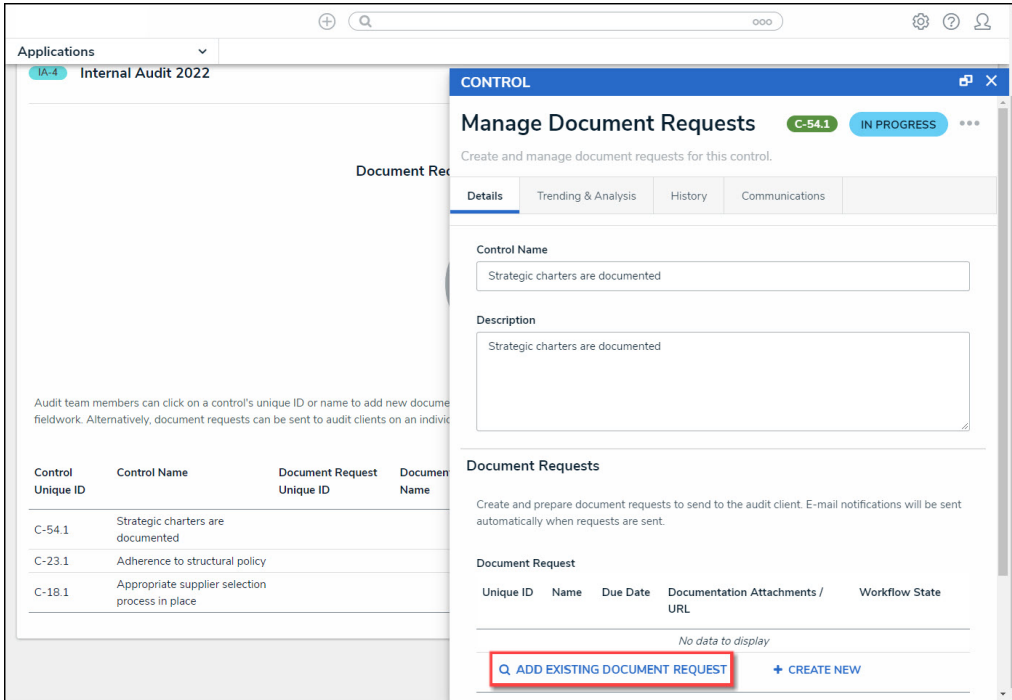
- From the **Document Request Listing** screen, click a **Control**.



*Click a Control*

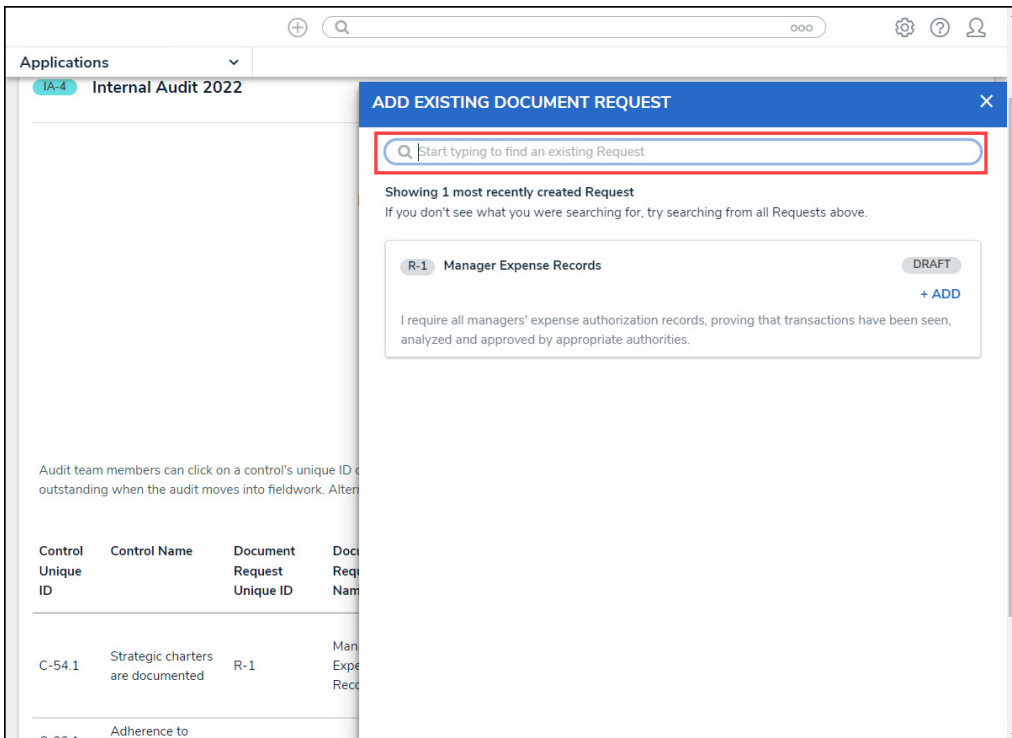
## ***Adding an Existing Document Request***

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



*Add Existing Document Request Button*

- 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*

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

document request to the Control.

The screenshot shows a web application interface with a modal window titled "ADD EXISTING DOCUMENT REQUEST". The modal contains a search bar with the placeholder text "Start typing to find an existing Request". Below the search bar, it states "Showing 1 most recently created Request" and "If you don't see what you were searching for, try searching from all Requests above." A single request is listed: "R-1 Manager Expense Records" with a "DRAFT" status and a red-bordered "+ ADD" button. The request description reads: "I require all managers' expense authorization records, proving that transactions have been seen, analyzed and approved by appropriate authorities." In the background, a table of controls is visible, including "C-54.1 Strategic charters are documented" and "C-23.1 Adherence to".

Control Unique ID	Control Name	Document Request Unique ID	Doc Request Name
C-54.1	Strategic charters are documented	R-1	Man Expense Recd
C-23.1	Adherence to		

+ ADD Link