

Moving an Internal Audit Project to Fieldwork

Last Modified on 07/10/2024 1:22 pm EDT

Overview

Before moving the audit plan to the **Fieldwork** state, you must fill out the **Define & Review Audit Scope** and **Document Requests** sections.

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

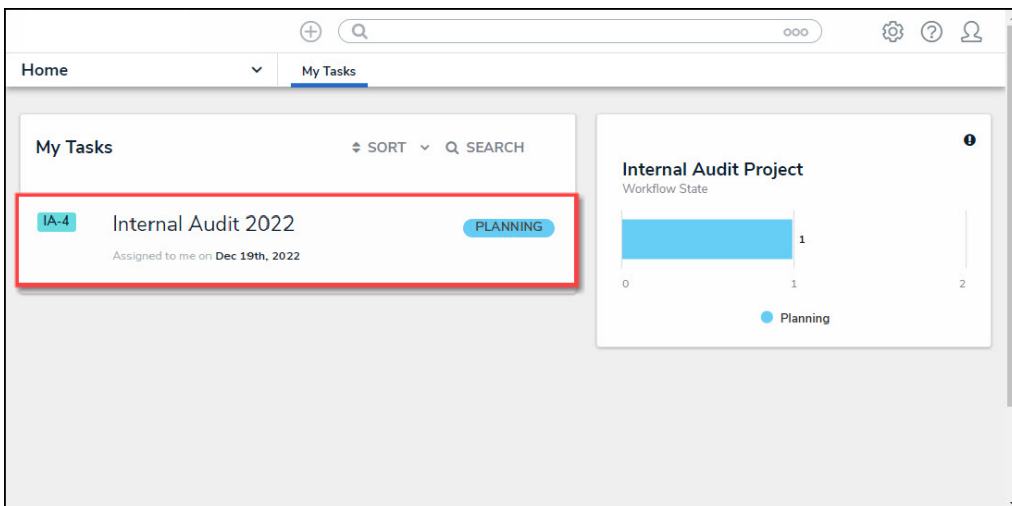
For further information on how to scope an Internal Audit Project, please refer to the [Define the Scope of an Internal Audit Project](#) article.

For further information on how to add a document request to an Internal Audit Project, please refer to the [Attach Document Requests to an Internal Audit Project](#) article.

For further information on how to send document requests to Audit Clients, please refer to the [Sending Document Request to Audit Clients](#) article.

Navigation

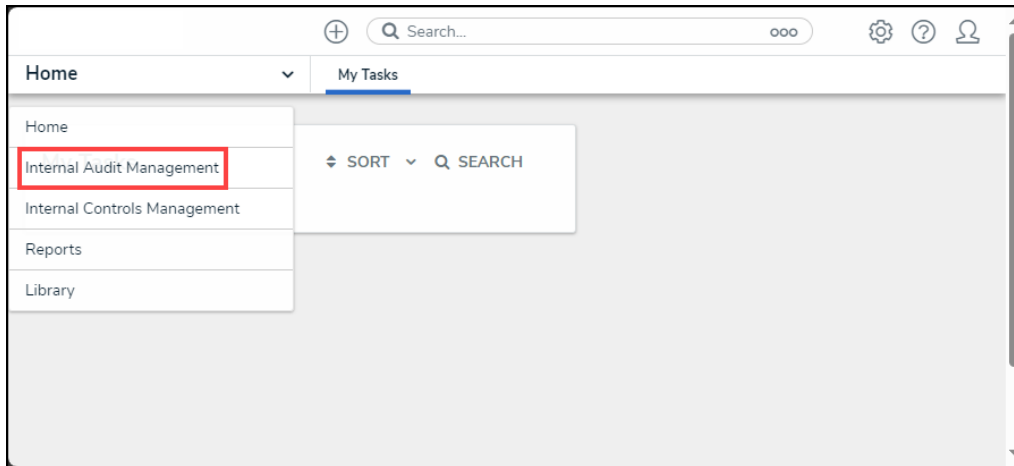
- From the **Home** screen, click on an **Internal Audit Project** in the **Planning** stage from the **My Tasks** section.



My Task - Internal Audit Project - Planning

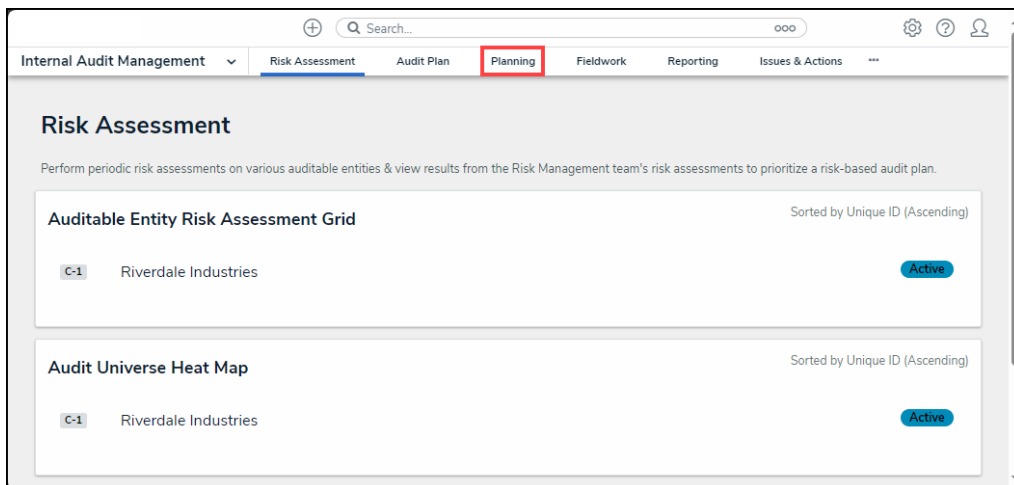
Alternate Navigation

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



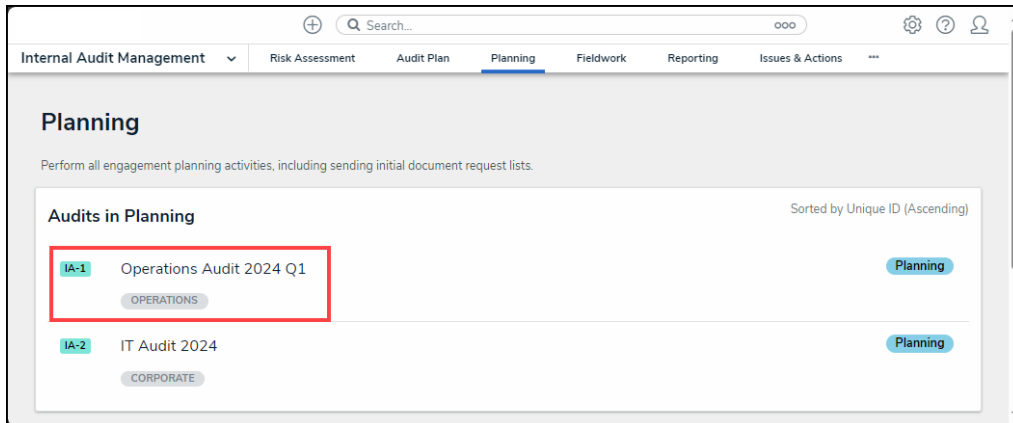
Home Drop-Down

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



Planning Tab

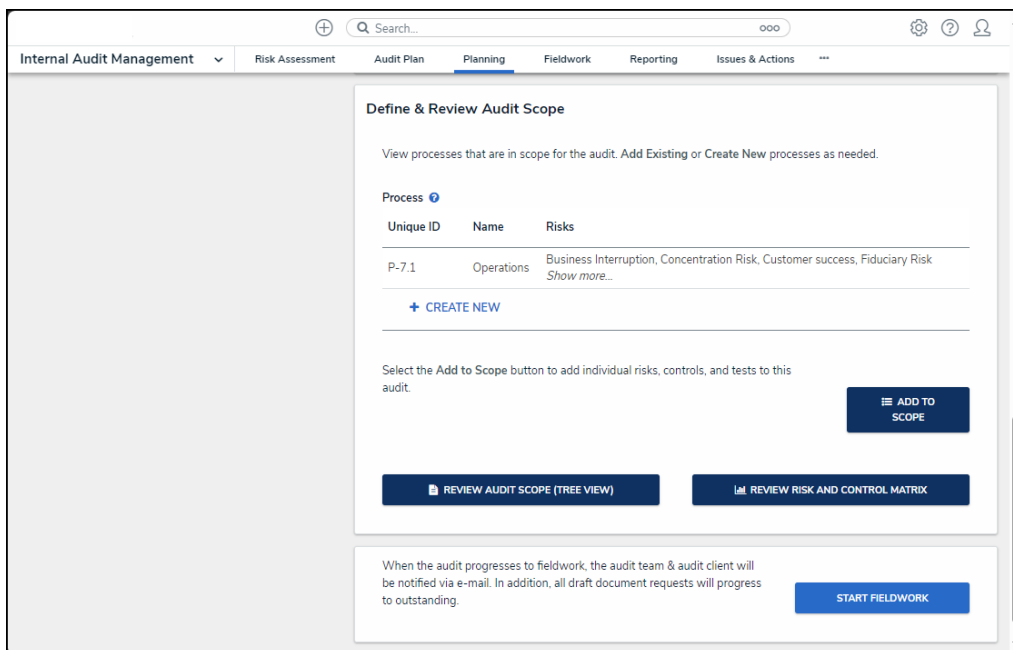
3. From the **Planning** screen, click the **Create Audit Project** button.



Create Audit Project Button

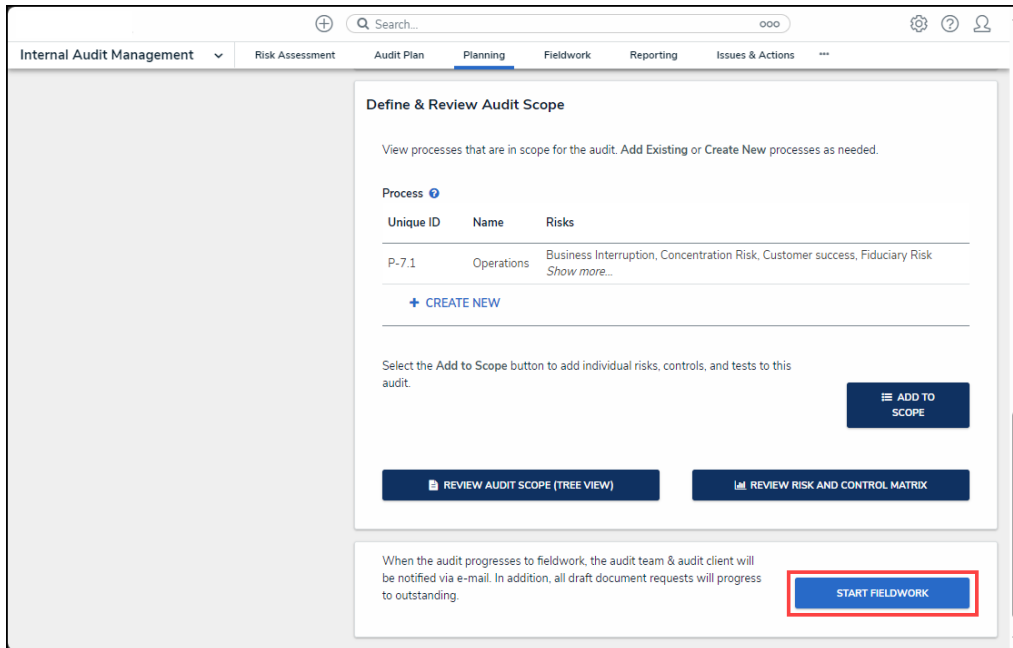
Moving an Internal Audit Project to Fieldwork

1. From the **Internal Audit Project** screen, scroll to the bottom of the screen.



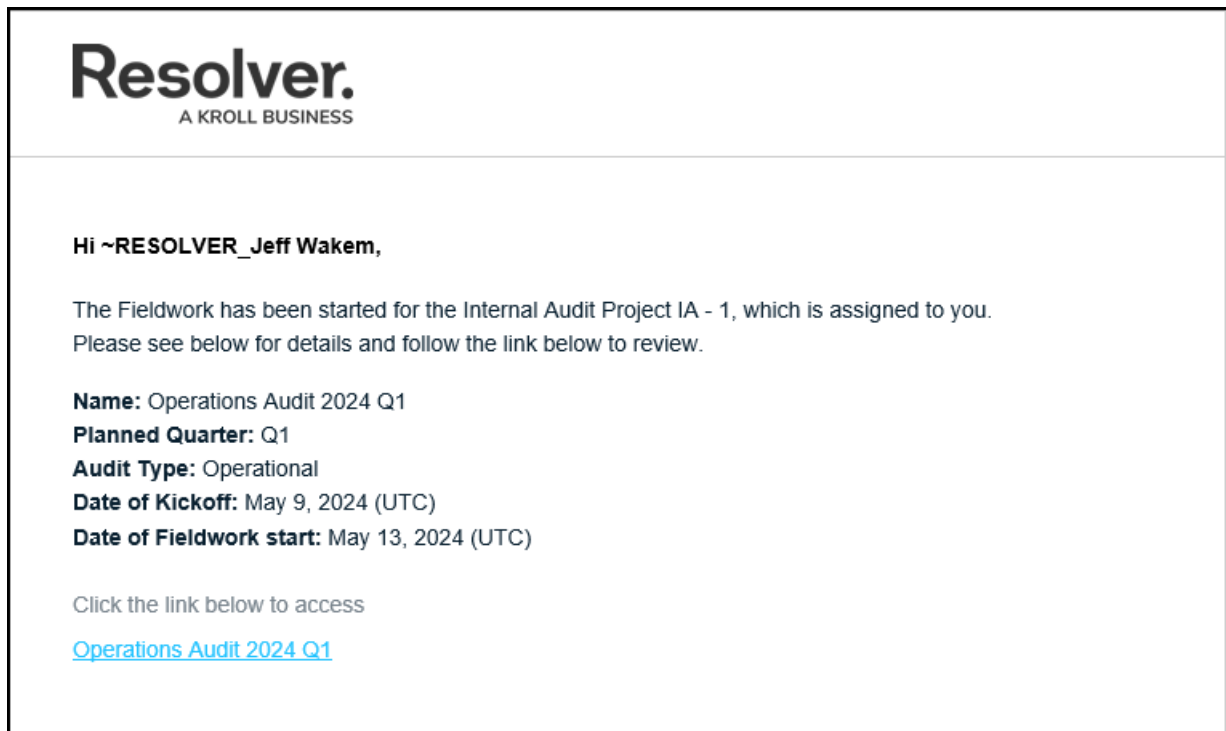
Internal Audit Project Screen

2. Click the **Start Fieldwork** button to move the Internal Audit Project to the Fieldwork status.



Fieldwork Button

3. A system-generated email will be sent to Internal Audit Staff members from **noreply@resolver.com**, indicating that the Internal Audit Control Tests are available for review. If the email does not appear in your **Inbox**, please search for another folder from the email (e.g. Junk, etc.).



System-Generated Email