



Opening an Audit File

# AUDIT MANAGER – BASIC CUSTOMER INFORMATION

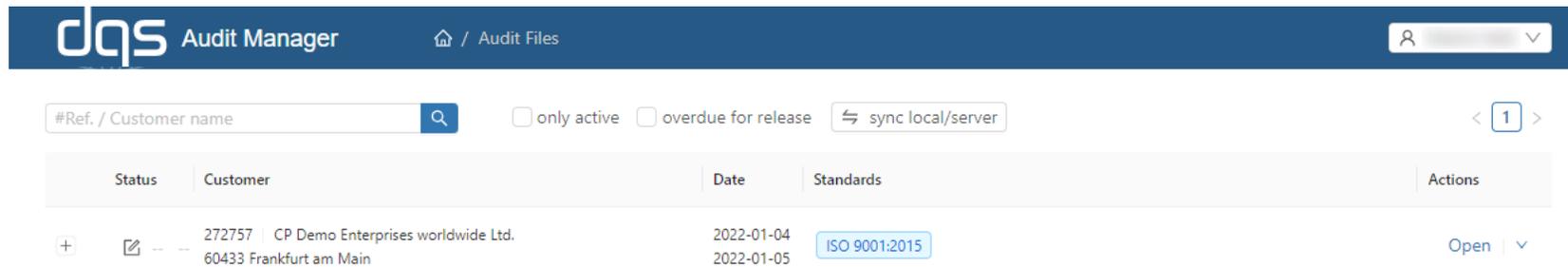
June 2022

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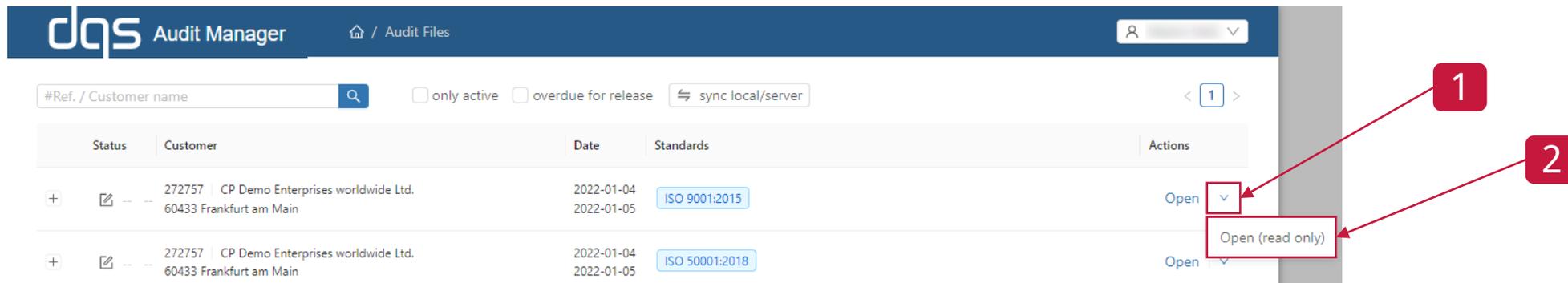
# Opening the Audit File

- There are two ways of opening audit file:

1. Click the audit file



2. Click the arrow – Click „Open (read only)“



# Audit File - Menu

- Any audit file has three main sections:
  - **Customer data** (basic information, sites, processes) usually open
  - **Audit planning** (audit schedule)
  - **Audit results** (action plan management)

The screenshot displays the 'dqs Audit Manager' interface. The top navigation bar includes the logo, the text 'Audit Manager', and a breadcrumb trail: 'Home / Audit Files / 272757 - CP Demo Enterprises worldwide Ltd.'. A search bar is located on the right. Below the navigation bar, three menu items are visible: 'Customer data', 'Audit planning', and 'Audit results'. The 'Customer data' item is highlighted with a blue underline and a red box. A red arrow points from this box to a larger, detailed view of the 'Customer data' menu below. This detailed view shows a list of sub-items: '> Company Data' (with a 'read only' lock icon), '> Contact persons' (with a 'read only' lock icon), '> Certificates' (with a 'read only' lock icon), '> Further locations of certificate scope', '> Management system and its processes', '> Site Details', '> Audit precondition' (with a 'read only' lock icon), '> Documents', and '> Documents from previous audit'.

# Audit File - Saving

- After editing all information, click on „Save Audit File“.

The image displays two side-by-side screenshots of a web application interface for saving an audit file. The left screenshot shows the 'Save Audit File' button highlighted with a red box and an arrow pointing to it. The right screenshot shows the 'auditfile saved' notification message displayed in a green box with a checkmark, indicating successful saving. The interface includes sections for 'Site Details', 'Relevant environmental aspects of certificate scope', 'Audit precondition', 'Documents', and 'Please inform us about any changes to this audit file:'. The bottom of the interface features a footer with 'Terms of use', 'Data protection policy', and version information.

- The information that your audit file has been saved will now be displayed.
- Notify your auditor of the changes you have made at this time.

# Inform Your Auditor About the Processing Status

- For each section of the audit file, you have the option to inform your auditor about its current processing status at the end of the page.
- For this, you can place one or more checkmarks at the respective position and add text information for the auditor.

The option for action plans only appears if action are required.

The screenshot displays a web interface for an audit file. It features several expandable sections: 'Site Details' (with sub-items: 'Relevant environmental aspects of certificate scope' and 'Audit precondition' marked as 'read only'), and 'Documents' (with sub-item: 'Documents from previous audit'). Below these is a form titled 'Please inform us about any changes to this audit file:' containing three radio button options: 'Data has been checked and revised, please update all records accordingly.', 'All required data for planning of the next audit has been completely entered.', and 'Action plans have not yet been maintained.' (which is selected). The other two options are 'Action plans have partly been maintained.' and 'Action plans have completely been maintained.'. Below the radio buttons is a text input field labeled 'Details about changes / further information' and a 'Submit information to auditor' button.

Save Audit File Close

# Close the Audit File and Log Out

- When you have finished editing the audit file, please close the file and log out of the Audit Manager.

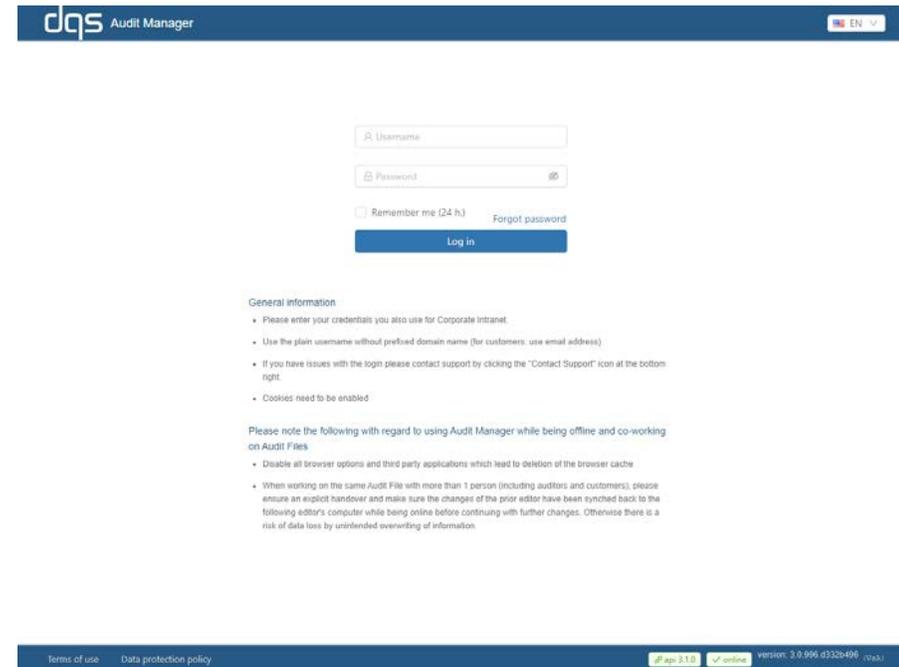
The screenshot shows the Audit Manager interface. At the top, there are three expandable sections: 'Site Details', 'Relevant environmental aspects of certificate scope', and 'Audit precondition' (with a 'read only' lock icon). Below these are two more expandable sections: 'Documents' and 'Documents from previous audit'. The main content area is titled 'Please inform us about any changes to this audit file:' and contains three radio button options: 'Data has been checked and revised, please update all records accordingly.', 'All required data for planning of the next audit has been completely entered.', and 'Action plans have not yet been maintained. Action plans have partly been maintained. Action plans have completely been maintained.' Below this is a text input field labeled 'Details about changes / further information' and a 'Submit information to auditor' button. At the bottom of the form, there are two buttons: 'Save Audit File' and 'Close'. A red box highlights the 'Close' button, and a red arrow points from it to a larger blue 'Close' button on the right side of the slide.

# Important Links

<https://docs.dqs.de/am/dqs>

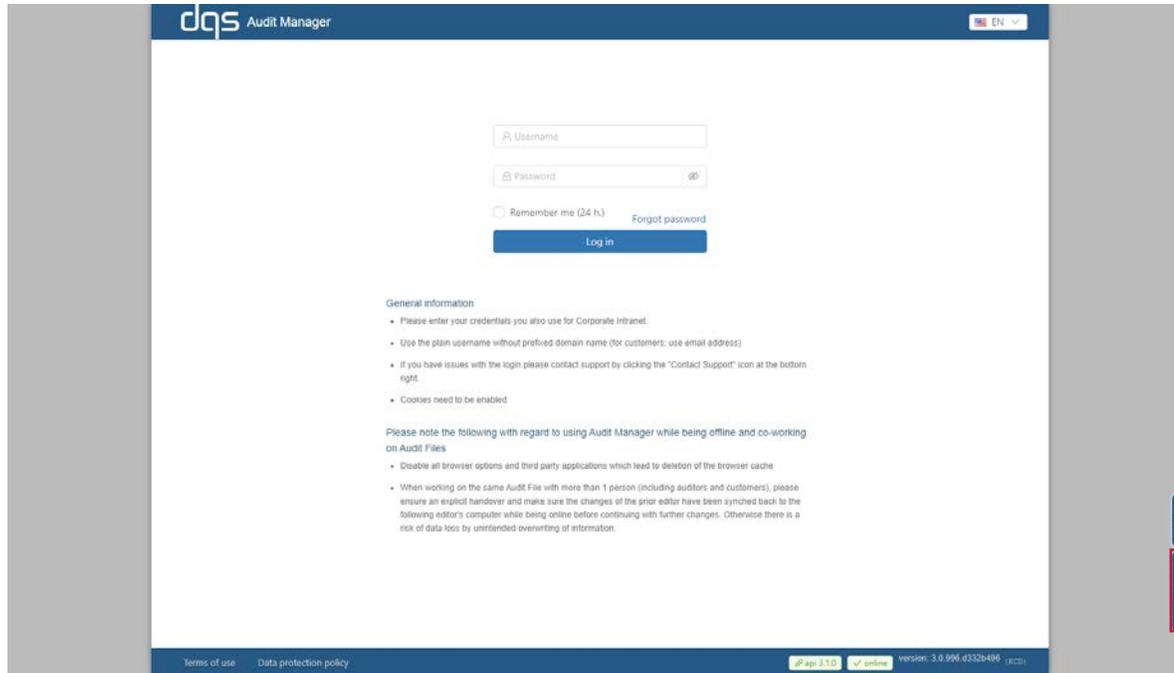


<https://auditmanager-beta.dqs-holding.com/#/>



# Support

## Need any help?



- Use „Contact support“ in the Audit Manager or contact our hotline at [auditmanager@dqs.de](mailto:auditmanager@dqs.de)

Contact support

# Support

- Are you missing any information in the user's guide or have questions about the Audit Manager?
- We are happy to hear suggestions!
- Our hotline is waiting for you:

DQS Audit Manager Projektteam

[auditmanager@dqs.de](mailto:auditmanager@dqs.de)

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