

Auditia

Run audit engagements, from planning to recommendations.

What it is for

Auditia structures the tracking of **audit engagements**: planning, interviews, recommendations and their validation cycle between the auditor, the audit director and the manager. It runs in your browser, with no install, and no data is sent anywhere.

Three roles

AUDITOR

Plans engagements, runs interviews, writes recommendations and submits them for validation.

MANAGER

Receives the accepted recommendations for their unit, handles them and records completion.

AUDIT DIRECTOR

Creates and assigns engagements, validates recommendations before they reach the managers.

The engagement, in four tabs

01 Detail	02 Schedule	03 Interviews	04 Recommendations
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The engagement is filled in order; recommendations then follow their validation cycle.

Getting started

- Create the engagement**
The director creates the engagement: purpose, scope, audited units and lead auditor.
- Plan and interview**
The auditor lays out the schedule steps and attaches interviews to each step.
- Write recommendations**
Finding, recommendation, action, owner, priority, due date. Automatic RECO-01 coding.
- Validate and forward**
The director validates, then the recommendation goes to the manager who accepts and completes it.
- Track the steering**
Dashboard: completion rate, overdue items, breakdown by status and by engagement.

Good to know

- ◇ **Recommendation cycle.** Draft, director validation, manager acceptance, completion. Each person sees what they have to handle.
- ◇ **Automatic coding.** Recommendations are numbered RECO-01, RECO-02... and restart from 01 for each engagement.
- ◇ **By status or by auditor.** The director switches the engagement view in one click.
- ◇ **Overridable validation.** Director validation is a default setting, adjustable when creating each engagement.
- ◇ **Role-based notifications.** The dashboard "To handle" banner surfaces what awaits each person.
- ◇ **Export and import.** PDF export of the engagement and action plan, JSON export and import. Trilingual: French, English, Italian.