



**iAuditor**  
by SafetyCulture

# Getting Started Guide

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Start using iAuditor to accomplish business goals right away. Follow these 5 steps to get started!

# Contents

Sign up for a free account	4
Upgrade to a premium trial	6
Add users	8
Set up groups	10
Share templates	12
Additional support	13

STEP 1

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Sign up  
for a free  
account

 iAuditor

# Sign up for a free account

Get started with iAuditor at no cost. Click [here](#) to get started.

**Tip: Utilize the free version of iAuditor to create inspections you can share out with your team in the future. You are allowed to create an unlimited amount of inspections on your free account.**

## Three ways to build inspections in iAuditor

1. Search our **free public library of +90k free inspection templates** across all industries created by iAuditor customers.
  - Browse by inspection type to find best practice templates for your industry
  - Edit and customize after you download them into your account
2. Our team will build one customized inspection template for you for free.
  - Upload your PDF, Word, or Excel document [here](#)
  - *\* Free conversion service limited to one English language form per customer maximum 50 line items*
3. Use iAuditor's template builder to create your own templates from scratch.
  - **New template builder guide**
  - **Webinar for template creation**

Need us to create more templates for you? Here's information on our template creation services: Submit for a quote [here](#).

**Free accounts only store completed template data up to 10MB. For unlimited data, [upgrade to premium](#).**

STEP 2

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Upgrade to  
a premium  
trial



iAuditor

# Upgrade to a premium trial

## Premium Trial Details

For 30 days during the trailing period, you will have access to iAuditor's premium features including:

- Analytics to start using and sharing actionable data insights
- Unlimited data upload and download per month
- Creating and assigning corrective actions to your team
- Receiving and sending instant notifications during inspections
- Controlling your team's permissions settings
- API access for platform integrations
- Enhanced administrative control of users within your organization
- Customizable branding of interface
- Exporting reports to include .Doc, .CSV, .JSON and .XML

## How to upgrade

When upgrading to a 30-day trial, you will be prompted to enter in billing information. The card you put on file will **automatically** be charged at the end of the 30-day period. You can cancel this trial at any point during the 30 days.

## Payment options

Pricing is dependent on the number of user seats you have and frequency of payment (monthly vs. annual).

**The annual plan will save you 20% per year.**

View pricing page [here](#).

To qualify for an invoicing plan, you must have 20 users on the Premium annual subscription.

**Tip: You can start with the monthly plan then migrate to premium annual at a later date.**



STEP 3

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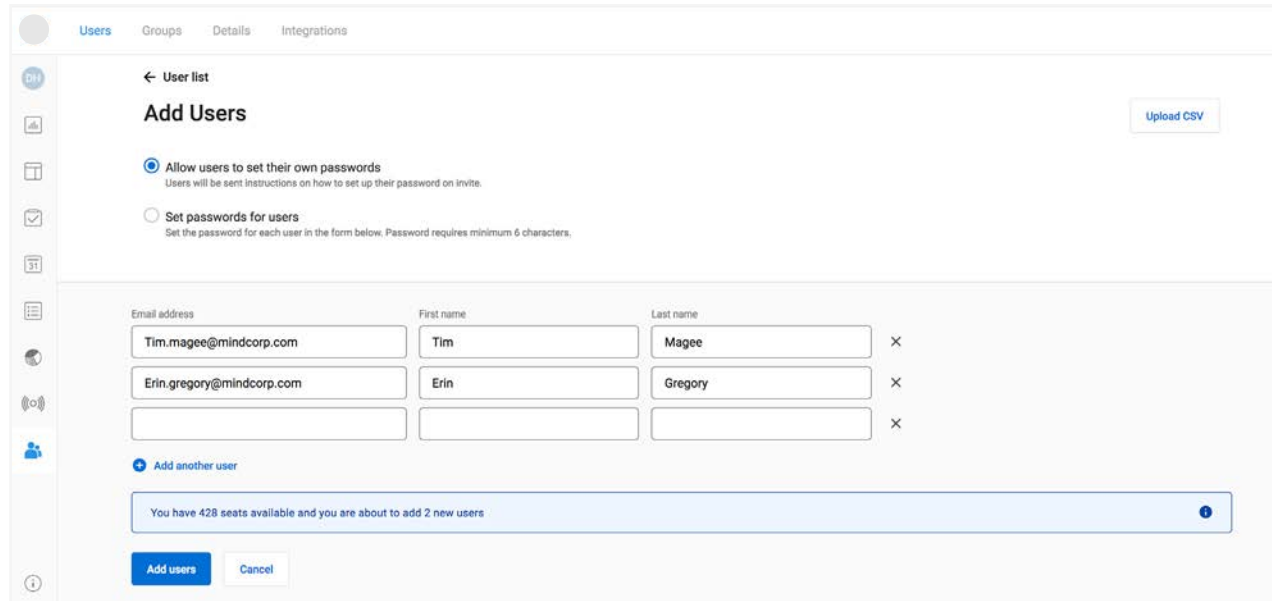
Add  
users



# Add users

You are not limited to the number of users you can add to your trial.

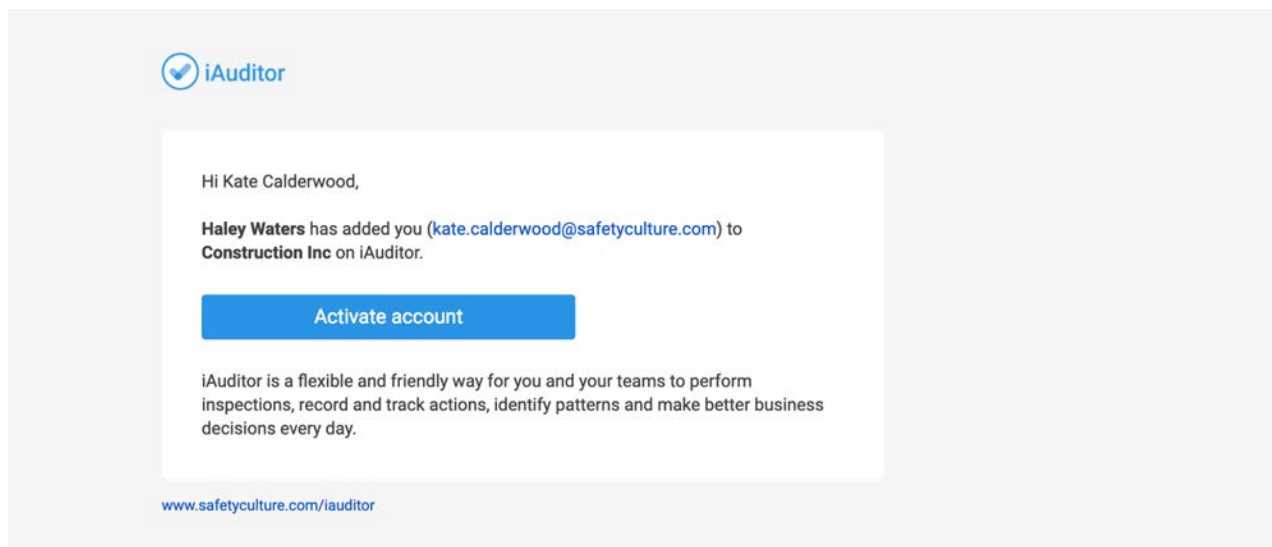
Add users by entering their first name, last name, and email address.



The screenshot shows the 'Add Users' interface in the iAuditor application. At the top, there are navigation tabs for 'Users', 'Groups', 'Details', and 'Integrations'. Below this is a sidebar with various icons. The main content area is titled 'User list' and 'Add Users'. There is an 'Upload CSV' button in the top right. Two radio buttons are present: 'Allow users to set their own passwords' (selected) and 'Set passwords for users'. Below these are three input fields for 'Email address', 'First name', and 'Last name'. The first row contains 'Tim.magee@mindcorp.com', 'Tim', and 'Magee'. The second row contains 'Erin.gregory@mindcorp.com', 'Erin', and 'Gregory'. A third empty row is shown below. An 'Add another user' link is below the fields. A blue bar at the bottom of the form area states 'You have 428 seats available and you are about to add 2 new users'. At the very bottom are 'Add users' and 'Cancel' buttons.

Each added user will get an email from SafetyCulture inviting them to download iAuditor and join your organization.

Once your team member has accepted this invitation and created a password for their account, you can begin setting up Groups and Sharing for that user.





STEP 4

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# Set up groups



iAuditor

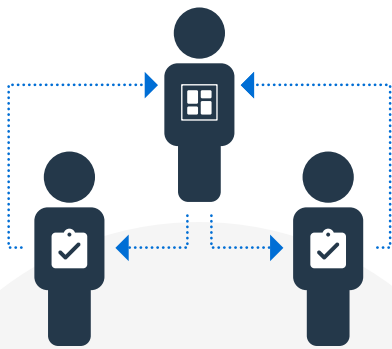
# Set up groups

Groups simplify and streamline the way you manage individual users within your organization.

By creating groups and adding users to their respective groups, you can share templates and inspections while assigning permissions at a group level. This way, you ensure everyone in a single group will receive the same permissions and templates.

Users can be members of multiple groups and can also be removed from groups if required. Their permissions and templates will be updated accordingly.

Please visit the [groups page](#) on our website for additional information.



**Tip: you do not need to set up groups if all of your users need access to the same templates and have the same permissions.**

## Setting up your iAuditor organization

Manage your users, subscriptions and invites. Use the following definitions of iAuditor's user permission types to keep the right people doing the right work.

### Permissions for small teams

For small teams, we recommend only enabling Admin level permission.

#### Permission Types

**Admin** Access to all permissions.

**Billing Management** Users can view and update subscription billing details and statements.

**Group Management** Users can create, edit and delete groups. With this permission, you can also add or remove users from groups.

**User Management** Users can invite or remove users to the organization.

**Data Access** View access to all files in the organization. Or, all the audits and templates ever created. This permission should be dedicated to IT resources and/or admins that need all data within the account. *Note: only available via iAuditor's web app.*

**Schedule Management** View, edit and delete scheduled audits for all users and groups.

**Template Creation** Ability to create a template.

**Upload to Public Library** Any template that a user has "view and edit" permissions for is available for upload to SafetyCulture's Public Library.

**Manage Response Sets** Create and edit response sets that can be used across templates by the organization. We call these "Global Response Sets."



STEP 5

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Share  
templates

# Share templates

You can share a template or inspection with any iAuditor user in your organization and set the recipient's level of access.

## Permission Levels

**Permissions is your users' access level on the templates that have been shared with them.**

**View:** Basic permission levels. Allows the recipient to view and conduct inspections from a template. For inspections, it provides them access to view only.

**View and Edit:** This is a mid-level permission. Allows recipients to make modifications to a template/audit, but not delete them. It allows new audits to be started from a template.

**View, Edit, and Delete:** This is the highest sharing permission, allowing complete access. New inspections can be started from a template and both templates and audits can be modified and deleted.

## ***Congratulations!***

**Your team can now begin conducting inspections from the templates you share with them. The default permission level gives you, the administrator of the account, access to your teams inspection results.**

## JumpStart iAuditor Training

Join this onboarding program to dive deeper into template creation, administrative functionality, and iAuditor Analytics.

See available JumpStart webinars [here](#).

# Additional support

## [Youtube Channel](#)

For tips, tricks, best-practices, new feature releases, and more, check out our YouTube channel.

## [Support Center](#)

Use this search engine to find helpful how-to articles.

## [Events and Webinars](#)

Watch on-demand webinars and stay up to date on upcoming events.

## [Case Studies](#)

See how other customers like you are utilizing iAuditor in their organization to achieve goals and make improvements to processes.

## [Integrations](#)

Use our open API to take reporting to the next level and automate your workflows.

## [API Developer guide](#)

If you are looking to set up an integration with iAuditor this link will walk you through the initial process.

## Support team

### You can reach our 24 hour support by:

Emailing [support@safetyculture.com](mailto:support@safetyculture.com)

Calling

*Kansas City* +1 816 787 1343

*Manchester* +44 161 768 1124

*Sydney* +61 1300 984 245

Chat with us in the app or online.