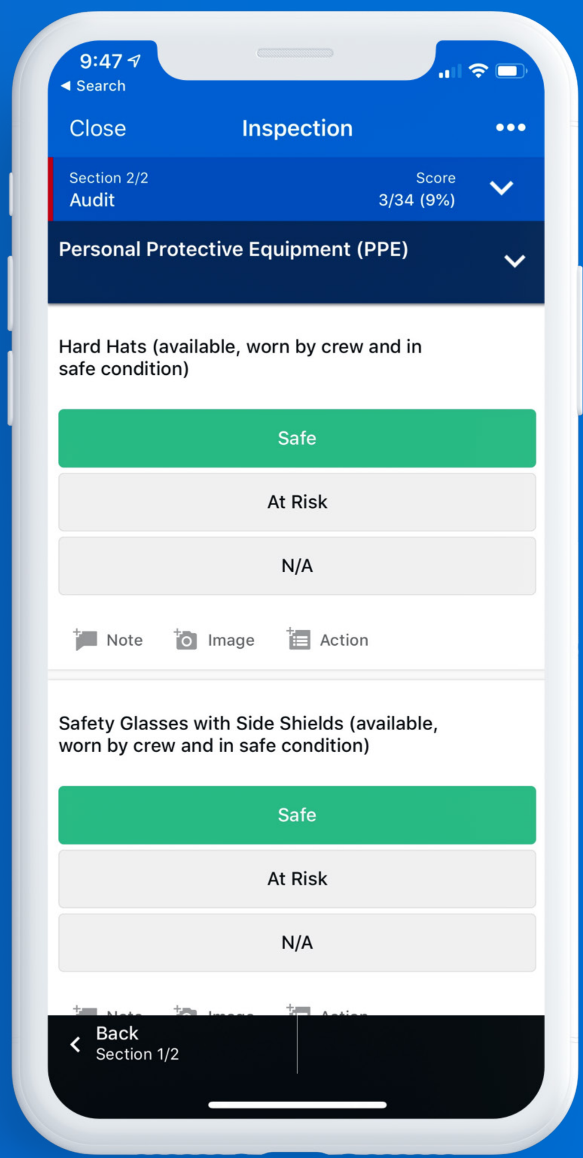
iAuditor
by SafetyCulture

Success with iAuditor

Follow the steps in this simple guide to get up and running quickly with iAuditor. Learn best practices for:

- Defining Objectives
- Organization Setup
- Template Creation
- iAuditor Analytics
- Accomplishing Goals



Exercise 1

First off, let's define what your goals are for iAuditor, so you can easily identify if its being used successfully. To do so, give yourself something to measure for the success of a specific period. Answer the following questions to help you define success:

1. What am I trying to accomplish with iAuditor?
2. What does it look like for my team to be successful with iAuditor? (i.e: increase in inspections being completed on time, improvement of team's inspection scores, be able to identify x number of corrective actions per site, reduce incidents by x percent, reduce time spend on inspections by x percent etc.)
3. What data do you need to measure success?

My goal in using iAuditor is to:

____

____

____

I will identify success by tracking:

____

____

____

I expect to see improvement:

in ____________________

by ____________________ **(number or percentage)**

by ____________________ **(date).**

Need ideas for metrics iAuditor can help you improve? Check out our customer case studies.

Milestone #1
Organization Setup

Set up organization

Make sure the right people have access to the right information at the right time. Enable your team to transition to iAuditor seamlessly.

Define your Key Stakeholders:

Your ***Sponsor*** sets objectives for iAuditor within your organization. ***Admins*** execute on these objectives.

Assign Each Role:

Sponsor: ____________________

- Sets strategic objectives
- Defines success metrics
- Accountable for program success
- Drives adoption of iAuditor

Administrator: ____________________

- Executes on program objectives
- Manages iAuditor environment
- Oversees communication and training
- Drives adoption of iAuditor

Setting up your iAudior 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."

More about:

Groups for streamlined sharing:

Groups simplify and streamline the way you manage individual users within your organization. By creating groups and adding users to them, you can share templates, audits and assign permissions at a group level.

Users can be members of multiple groups and easily removed if required. Their permissions and access to templates will update accordingly.

Examples

There are many ways to divide your team into groups. Here are some examples:

Small Company (<20 people)
In a small company, it's best to keep the number of groups small. Two groups of users should be enough: an inspection team, for those conducting inspections, and a management team, for people that need access to that data.

Big Company
For larger organizations, it's easiest to break down groups first by locations or divisions, then by the inspectors and managers in each. Try to mimic the hierarchy of your company. Ideally, keep the number of groups you create to less than four.

Sharing Templates:

Sharing a template is fast and easy in iAuditor. It eliminates the need for email. You can share a template or an audit with any iAuditor user or those who don't have an account. When you share a template, you can also set the level of access that the recipient has to that template:

Permissions (Access Level)

View:
This is the basic permission level and allows the recipient to view and conduct audits from a template. For audits, it provides access to view it (read-only) and export.

Recommended: For all users

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

Recommended: Only used for users who need to create templates

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

Recommended: Reserve for only your iAuditor admins

Note: When sharing Templates, most users need "view" access. Give your Template Creation group "view & edit." Typically, only Administrators need "view, edit, delete."

Milestone #2
Template Creation

Template creation

To get good information from iAuditor reporting and analytics, you'll first need a great template. A rule of thumb our most successful customers follow is simplicity. Try to keep the number of templates you create to a minimum.

First, watch this: *How to build great templates (Intro to Template Editor)*

Next, follow these steps to *create a template*.

When setting up your templates, it is essential to think through what information you need from your inspections. Ask yourself:

1. What do I want to get out of my inspection data?
2. What questions am I trying to answer?
3. What problems am I trying to solve by implementing iAuditor?

Helpful tools:

- *Copy and paste tool:* Allows you to copy entire category sets of questions that can added to another template.
- *Leverage failed items:* Set up failed responses to identify performance issues through Analytics.
- *Bulk add questions:* Input large sets of questions to automatically populate your template for you. Set failed responses in bulk.
- *Public library:* Browse thousands of free templates available for download, created by industry experts.

Next Step: Use iAuditor

Spend the next 10 days conducting inspections using iAuditor so we can review analytics and how iAuditor is working for your organization.

Top 10 Template Tips
Best Practices

1. Use **drop down lists** and remove as much free form text as possible. Analytics favors drop down lists.
2. Use **smart fields** (“if, then statements”) to eliminate irrelevant or redundant information. Show front line users only what they need to see when they need to see it.
3. Mark important items as **mandatory**. Ensure you’re collecting essential information on every inspection.
4. Standardize **essential inspection data** across ALL Templates. Use the Template “title page” to ask the same questions such as business line, job #, customer name, etc.
5. Add **instructions or reference fields** often. Give workers with 5 days experience the references to know what 15 year experienced vets know intuitively.
6. When **sharing** Templates, most users need “view” access. Give your Template Creation group “view & edit.” Typically, only Administrators need “view, edit, delete.”
7. Use **categories** to break up the inspection for ease of use. This allows for category scoring in Analytics.
8. Create “**Master Copies**” of Templates. Only Admins have access to edit this version and is not shared with anyone other than Admins. Master Copies can be duplicated in order to make modifications for project specific or business unit purposes.
9. Eliminate the **N/A response** where possible. If you need N/A, evaluate the N/A responses frequently to see where you might be able to add common possible answers. The N/A response can become a crutch, default answer.
10. Name Templates with **detailed nomenclature**.
    Ex: JSA - Midwest - V.1

After 10 days of use

Milestone #3
iAuditor Analytics

Review your team's performance in analytics to assess if it's producing meaningful reports.

iAuditor Analytics provides insightful dashboards and detailed reports on your business operations to help you make data-driven decisions. Use this tool to discover trends, reduce risk, and prevent incidents. See an *analytics* tutorial and *in-depth overview*.

Just getting started with analytics? Start with these reports: Frequently Failed Items, Inspections Conducted, Inspections Scored by Inspector

Looking for a more advanced analytics view? Check out these reports: Performance by Site, Items Scored by Template, Frequently Failed Items by Site, Template, etc.

Available Summary Graphs:

Conducted: Trends on audits conducted.

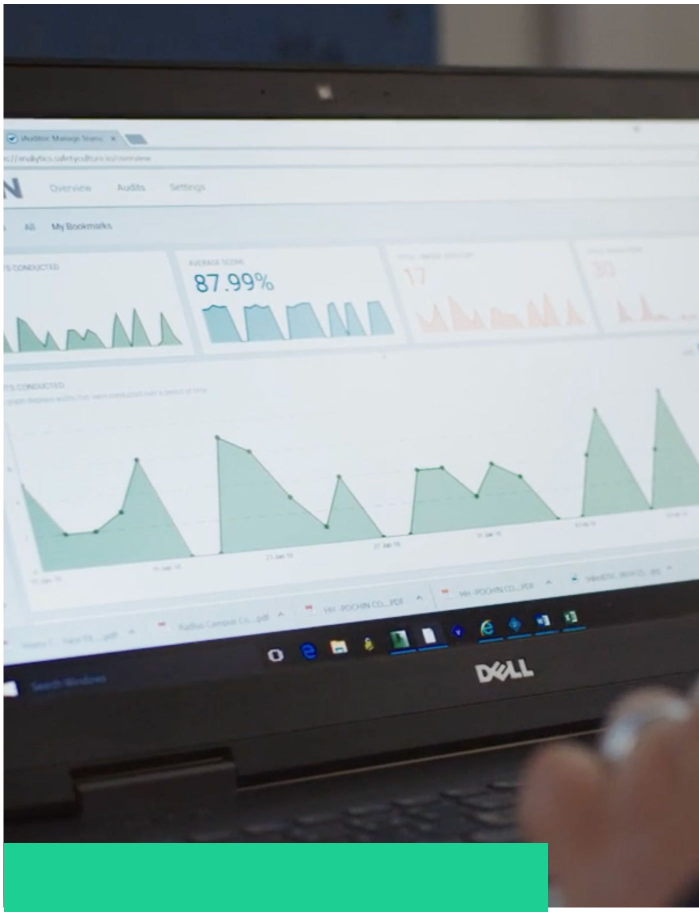
Performance: Trends of average audit scores.

Breakdown of responses across Audits: Your team's performance against other response sets.

Audit Information by Location: Where audits have been conducted across teams.

Note: Ask your teams to enable location services on their devices to collect more accurate audit location information.

Failed items: All audit data identified as failures across selected Templates. Use to see all failed responses recorded and associated notes and images with each.



iAuditor Analytics provides insightful dashboards and detailed reports on your business operations so you can make data-driven decisions

Milestone #4
Accomplishing Goals

Go back to your initial success criteria from Exercise 1.

How are your inspections actually performing?

What changes do we need to make to accomplish goals or find additional data?

Need technical help? Contact our customer support professionals. They are available 24/5 via:

Chat in-app and on website
Email *support@safetyculture.com*
Call +1 816 787 1343

iAuditor

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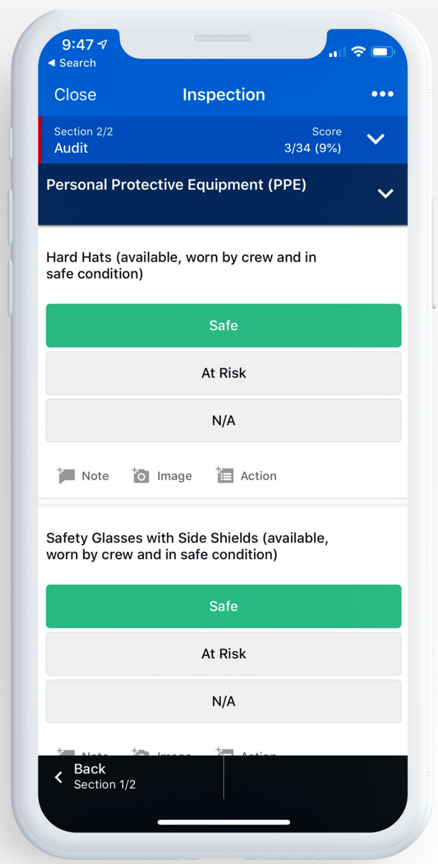

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