

Audit Reports – A Guide

Audit Reports are system-generated reports providing information on user access to the Affinitext library. The reports are sent to the designated 'Library Authority' or 'Library Administrator' to invite the recipient to review user access to the library and respond with any changes required.

Benefits of a regular review of users:

Although user management can be reviewed at any time, a regular formal review of access is recommended. Remember, your documents in the Affinitext library may be confidential and/or commercially sensitive, so users should be removed from the library as soon as their need to access the library ceases, as in the case of departing employees and advisors who have completed their work for you. A review may also bring to light the need to add new users to the library.

The reports are sent at 3-monthly intervals, however if you wish to receive them more frequently, please contact us at support@affinitextgroup.com.

Who can access the Library?

Access to the library is unlimited in respect to users or usage, so access can be given widely. Your Affinitext licence fee allows you to give access to your organisation's project team, the organisation more widely, your shareholders and those within your 'sphere of influence' such as auditors, accountants, and legal advisers who you may employ from time to time to assist you in the management of your project.

What does the Audit Report consist of?

The report is Excel based and consists of three sheets:

1. Audit Summary – date of the report, user groups to be reviewed, who is responsible for the audit and general information about number of users and books in the library.
2. Group Membership – lists the users who have access to each user group.
3. Group Permissions – lists the books and location available to each user group.

Action:

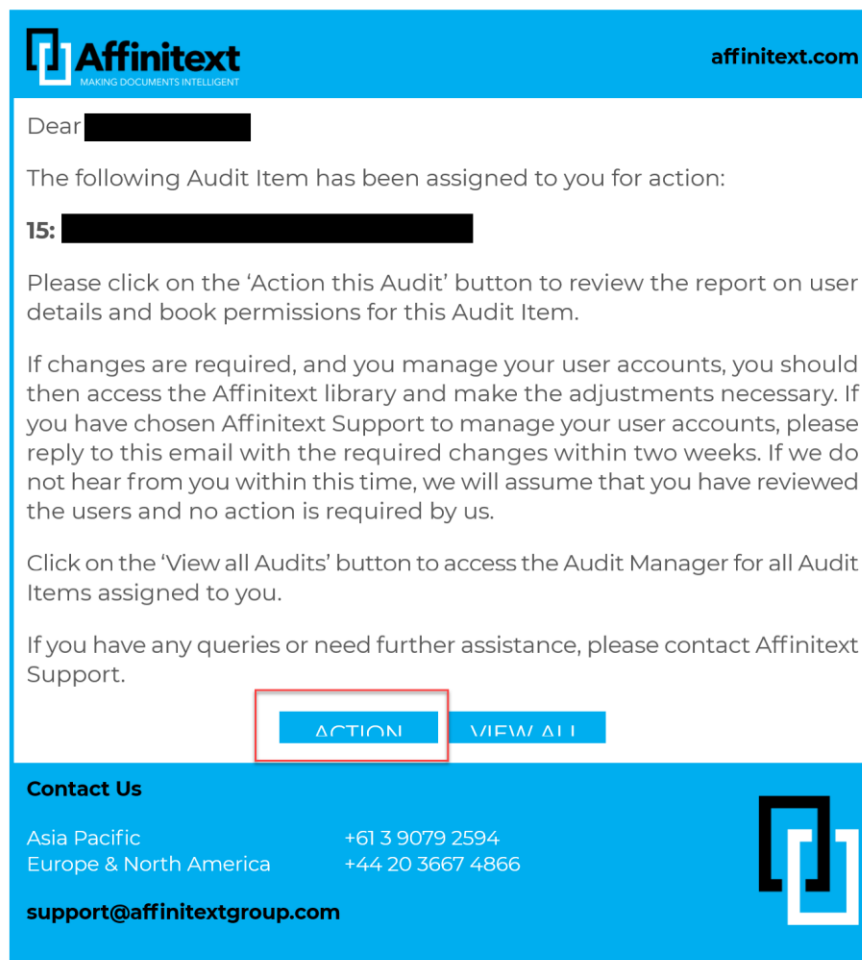
On receipt of the Audit Report, review the entire report, although you may wish to focus on the Group Membership sheet in particular.

Request any required changes (additions, removals, email address changes etc) via email support@affinitextgroup.com.

If you are a Library Administrator, you can make the user changes yourself, should you prefer to.

The email notification:

The reports are sent to the Library Authority or Library Administrator in the following format.



The screenshot shows an email notification from Affinitext. The header includes the Affinitext logo and the website address affinitext.com. The main body of the email contains the following text:

Dear [REDACTED]

The following Audit Item has been assigned to you for action:

15: [REDACTED]

Please click on the 'Action this Audit' button to review the report on user details and book permissions for this Audit Item.

If changes are required, and you manage your user accounts, you should then access the Affinitext library and make the adjustments necessary. If you have chosen Affinitext Support to manage your user accounts, please reply to this email with the required changes within two weeks. If we do not hear from you within this time, we will assume that you have reviewed the users and no action is required by us.

Click on the 'View all Audits' button to access the Audit Manager for all Audit Items assigned to you.

If you have any queries or need further assistance, please contact Affinitext Support.


At the bottom of the email body, there are two buttons: "ACTION" and "VIEW ALL". The "ACTION" button is highlighted with a red box.

The footer of the email contains contact information:

Contact Us

Asia Pacific +61 3 9079 2594
Europe & North America +44 20 3667 4866

support@affinitextgroup.com



Click on 'Action This' to open the report:

The link will take you to the Affinitext library where, once you have logged in and subject to permissions, you will see a box prompting you to start the download report. Click 'ok' and it will automatically download as an Excel spreadsheet:

Dear [REDACTED]

The following Audit Item has been assigned to you for action:

86: [REDACTED]

Please click on the 'Action this Audit' button to review the report on user details and book permissions for this Audit Item.

If changes are required, and you manage your user accounts, you should then access the Affinitext library and make the adjustments necessary. If you have chosen Affinitext Support to manage your user accounts, please reply to this email with the required changes within two weeks. If we do not hear from you within this time, we will assume that you have reviewed the users and no action is required by us.

Click on the 'View all Audits' button to access the Audit Manager for all Audit Items assigned to you.

If you have any queries or need further assistance, please contact Affinitext Support.

[ACTION THIS](#)

[VIEW ALL](#)

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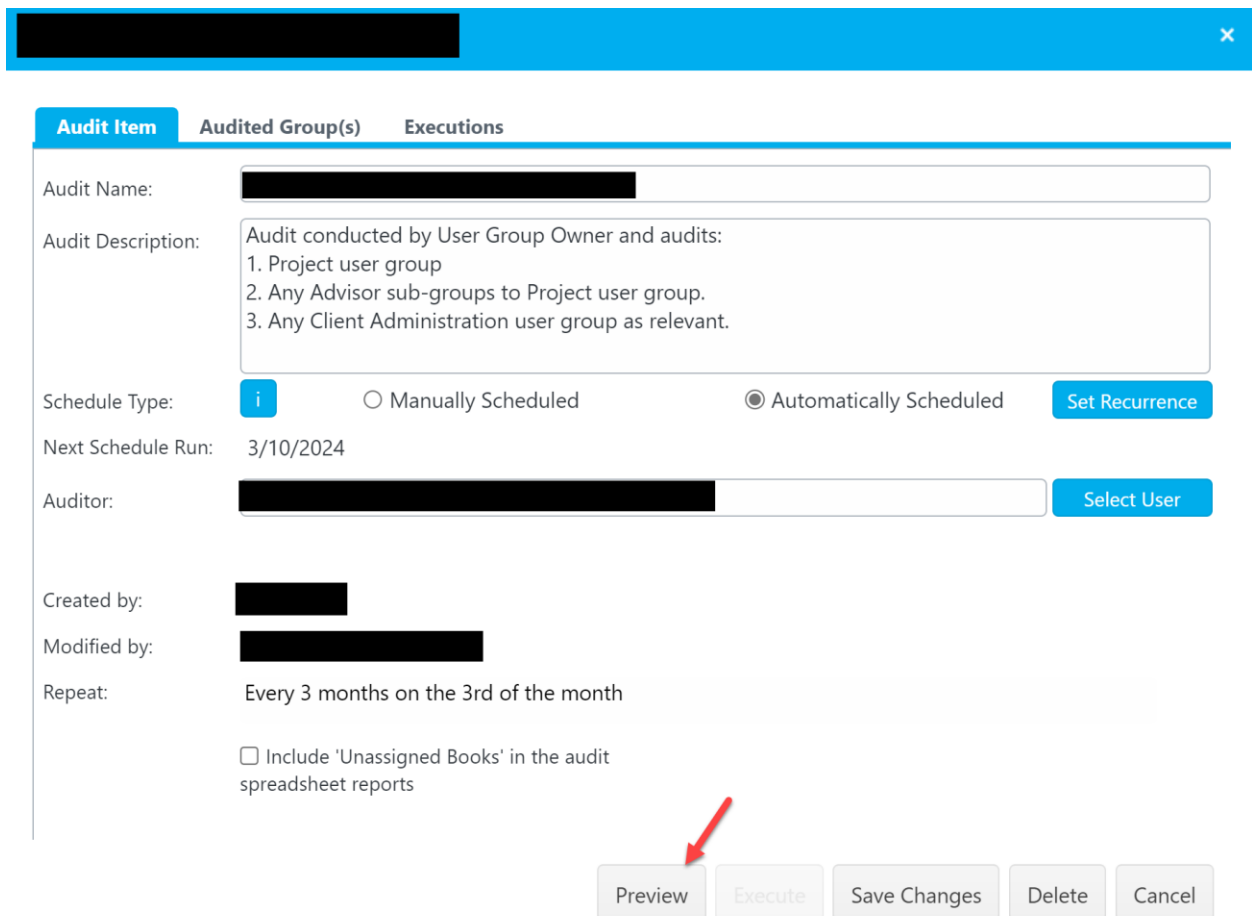
support@affinitext.com



Alternatively, click on 'View All' to access all your reports

The link will take you to the Affinitext library where, once you have logged in and subject to permissions, you will be presented with a list of all audit items to which you have been assigned.

Double-click on the audit item to open the editor and then click on 'Preview' button to generate a report. Click 'Run' when prompted, then 'ok' when prompted and the report will automatically download as an Excel spreadsheet.



Audit Item Audited Group(s) Executions

Audit Name: [Redacted]

Audit Description: Audit conducted by User Group Owner and audits:
1. Project user group
2. Any Advisor sub-groups to Project user group.
3. Any Client Administration user group as relevant.

Schedule Type: **i** Manually Scheduled Automatically Scheduled **Set Recurrence**

Next Schedule Run: 3/10/2024

Auditor: [Redacted] **Select User**

Created by: [Redacted]

Modified by: [Redacted]

Repeat: Every 3 months on the 3rd of the month

Include 'Unassigned Books' in the audit spreadsheet reports

Preview Execute Save Changes Delete Cancel

The audit items do not require closing or completing, they are set to auto-generate at regular intervals.

The report consists of a 3-sheet Excel spreadsheet.

Sheet 1: Audit Summary sheet:



The screenshot shows an Excel spreadsheet with the following data:

Audit Summary as at	2020-01-16	13:00:06
Audit ID	52	
Audit Name	[REDACTED]	
User Groups	[REDACTED]	
Auditor	[REDACTED]	
Total Number of Users	20	
Total Number of Books	116	

Callouts in the image:

- Opens at 'Audit Summary'
- Click here for information on who has access to the library
- Information on book permissions for each user group

Sheet tabs at the bottom: Audit Summary, Group Membership, Group Permissions, (+)

- Last Access

The status relates to the user's status in the library and will show either:

- **Active** – user is accessing the library normally
- **Password Expired** – user needs to either log in for the first time or their password has expired over time
- **Locked Out** – user needs to have their account unlocked and credentials re-set – this can be done by the user from the landing page by clicking on the 'locked out or forgotten password' link. Alternatively, they can contact support@affinitextgroup.com for the account to be re-set.
- **Inactive** – user has been deactivated from the library either through time or another reason – contact support@affinitextgroup.com regarding users with this status.

The data is shown per user group, so if you are reviewing more than one user group and a user has access to more than one user group, then their details will be duplicated into each user group.

If users are to be removed but their role is being taken over by a new person, please let us know so that we can transfer any data (such as tasks and notes) associated with the off-boarding user to the new user.

Sheet 3: Group Permissions:

This sheet shows the book permissions for each user group. The information provided is:

- Group name
- Location of Book
- Book Name
- Book URL

The data is shown per user group, so if you are reviewing more than one user group and a book is available to more than one user group, it will be duplicated into each user group.

If there are any actions required, email support@affinitextgroup.com with the details.

Document Version Control

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