



# User Guide

**Getting Started - Using the Audit Module.**

# Getting Started - Using the Audit Module

## Vision: The Multi Module Risk Assessment and Management System

Vision is a web based, modular software platform. Our Vision software allows you to manage your entire property compliance in one place... online. It has been designed to show where in your portfolio the risks lie for remedial works and gives secure access to your consultants. Distribute and manage your internal and external survey teams to keep your information up to date and

Our exclusive focus is on providing risk management and compliance software that can be easily integrated into our client's organisations.

Vision has been developed with industry leading clients, and includes a large range of modules covering all aspects of Health & Safety, Environment and compliance. These modules are configured to meet our client's precise business needs.

The flexibility of Vision and its functionality has allowed us to deliver measurable benefits for a diverse range of global clients and industries, where managing compliance efficiency is business critical and embedded in the organizational culture.

We recognize that a solution in itself has no inherent value unless it solves problems or delivers results. Therefore the solutions we provide are as a result of extensive consultation to ensure our software products truly meets the needs of our clients.

Vision works in partnership with our clients to review business risk, configure and prioritise appropriate compliance actions to meet individual client requirements. This collaborative approach ensures business compliance risks are appropriately managed in accordance with current statues and guidance.

The Vision software goal is to deliver solutions which can be rapidly introduced into a client's organization; are intuitive and easy to use; integrate seamlessly with the use of internal systems; and scale easily across new functionality, additional users and internal management structures.

In short, we consider Vision to be the most powerful, intuitive and user- friendly risk assessment management software available on the market.



**Audits Module**

# Getting Started - Using the Audit Module

**Step 1: Go to the Vision website, the link to the website is <https://primary.visionriskonline.com/>.  
A link to Vision can be found on our website.**



**Audits Module**

The screenshot shows the login page with the following elements:

- Please enter your login details** section with fields for Login Name (containing 'your.name') and Password (masked with dots). There is a checkbox for 'Contractor login?' and a 'Login' button. Below the button are links for 'Temporary Access' and 'Forgotten password?'.
- Pre-Vision Check List** section with the following status:

Browser:	Internet Explorer v:11
JavaScript Enabled:	✓ Yes
Pop-ups Enabled:	✓ Yes

Below the checklist, there is a note: "If you see a **No** in the above list you may experience problems logging in and/or using this application. Click on the **No** for further instructions." A red 'No' icon is visible in the text.

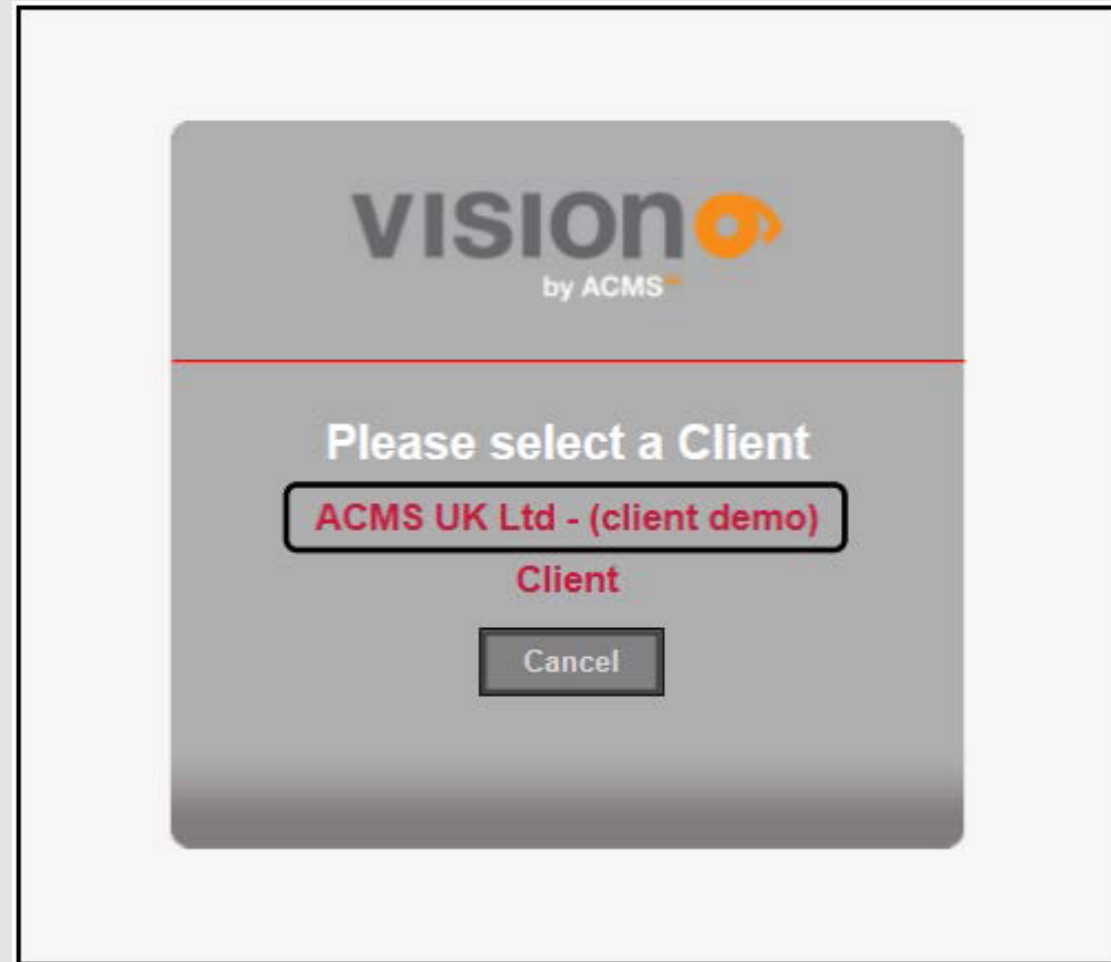
At the bottom, there is contact information for **ACMS UK** and a 'Download Tablet Application' link.

Please enter your personal username and password here

Pre Vision checklist has been created to enable full, uninterrupted use of all the Vision functions

Instructions for youe relevant browser are available by cicking on the red 'No' option if necessary

## Getting Started - Using the Audit Module



Once you have logged in, you will have the choice to select your customer followed by your client. This is provided you are managing more than one customer and client



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**VISION**  
by ACMS UK

Main Sites Maps Knowledge News Portfolio Dashboard

Show search results

### Site Management

Sitecode, Name, or Address:  Business Unit:  Status: Active

Site Code	Name	Client	Business Unit	Address	Is Active?	Details
<a href="#">ACMS UK-001</a>		ACMS UK Ltd - (client demo)	Commercial	The Lookout, 4 Bull Close Road, Nottingham, NG7 2UL	Yes	<a href="#">Details</a>
<a href="#">ACMS UK-002</a>		ACMS UK Ltd - (client demo)	Commercial	Unit 1 The Heathcote Building Nottingham Science Park Nottingham NG7 2QJ	Yes	<a href="#">Details</a>
<a href="#">Sarah Training 1</a>	The Lookout	ACMS UK Ltd - (client demo)	Sutton Housing Partnership	ng8 9tg	Yes	<a href="#">Details</a>

Once you have you logged into vision you will need to go to the sites tab and select the site you would like to fill out an audit for.



**Audits Module**

# Getting Started - Using the Audit Module

Site Info [Icons: Fire, Home, Wheelchair, Water, A, Wrench, Document]

Documents

Site Audits

New Audit Process

Name	Latest Audit Date	Expiry Date	Next Audit Date	Period Overdue (Days)	Frequency (Month)	Auditor	Status	History	Report	Actions
<a href="#">ACMS UK Office Audit</a>	21/08/2017					donte palmer (ACMSUK)	Non Compliant	New View	Report	
Electrical Testing	06/07/2017					Shane Henson (ACMSUK)	Compliant	New View	Report	
PAT Testing							No previous inspection	New		
<a href="#">Survivor Audit</a>	12/04/2017	26/04/2017	12/04/2018		12	Josh Broad.Admin	Overdue	New View	Report	

Once your in your site got to the audits module tab, from here you can start a new audit by clicking the new audit process button highlighted above.

You will need to choose the template and the name of the audit you are completing. When you have finished press save and the audit will appear in the list.

Press the new button on the audit you are completing.

When you start a new audit vision will prompt you with a popup box asking for the date you are completing the audit.

Audit Process

Template:

Name:

Save Cancel

Start New Audit


Audit Date:\*

OK Cancel



# Getting Started - Using the Audit Module

Back ACMS UK Office Audit (Test audit)

 Date of Audit: 21/08/2017  
 Inspection Interval: 1 Month  
 Next Audit Date: 21/09/2017  
 Auditor: e6ae2f1c1-7969-4d77-8716-5d138  
 Audit Expiry Date: 16/08/2017  
 Contractor: acmsuk  
 Comments: test audit

InActive Item:

Worksheet

Name							
section 1							
Nr	Question	Answer	Comments	Compliant	Score	Priority	Legal
1	question 1	Upload Certificate		N/A			
2	question 2			N/A			



**Audits Module**

To enter information on the audit you will need to press the pen and paper icon.


Once you have finished entering information for the questions please press the save icon.









Once you have answered all the questions on the audit and saved your progress press the back button in the top left corner to return to the audits module menu.

If a question wants you to upload a certificate it will create a popup windows where you will need to select the file for your certificate. Select you file and click open, the file will then be uploaded to vision. Files that are uploaded can be downloaded from vision on any computer.

# Getting Started - Using the Audit Module

Site Audits

 [New Audit Process](#)

Name	Latest Audit Date	Expiry Date	Next Audit Date	Period Overdue (Days)	Frequency (Month)	Auditor	Status		History		
<a href="#">ACMS UK Office Audit</a>	21/08/2017	27/08/2017	22/09/2017			donte palmer (ACMSUK)	Non Compliant	New	View	Report	 
<b>Test audit</b>											
<a href="#">Electrical Testing</a>	21/08/2017					donte palmer (ACMSUK)	Compliant	New	View	Report	 
PAT Testing							No previous inspection	New			 
<a href="#">Surveyor Audit</a>	12/04/2017	26/04/2017	12/04/2018		12	Josh Broad.Admin	Overdue	New	View	Report	 

[Back](#) Site Audits

Audit Date


[21/08/2017](#) [Report](#)









You can go back to an unfinished audit by clicking the view button in the history column. When you press the button it will take you to page with the dates of the audit. click on the desired date to continue your progress on that audit.





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 [New Audit Process](#)

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PAT Testing								New			 
<a href="#">Surveyor Audit</a>	12/04/2017	26/04/2017	12/04/2018		12	Josh Broad.Admin	Overdue	New	View	Report	 

If you would like to download a local copy of an audit you will need to press the report button highlighted above and then you can choose between saving the audit as a pdf or as a word document. The document will be in your computers downloads folder.



# Getting Started - Using the Audit Module



You can add a new document to the site by clicking the paper with a check mark.

You can find any site documents which are used in the audits module by clicking on the documents tab whilst you are in the audits module.

To create a category for the documents you will need to click the folder icon.

**Audits**

Name	Upload Date	Expiry Date	
Certificates			
ACMSUK Logo Grey.png	21 August 2017		
basic-health-and-safety-training.jpg	04 January 2017		
Capture.PNG	10 March 2017		
download.jpg	18 August 2017		
Policy Template Front Cover & QA.docx	16 August 2016		
sick note.jpg	16 August 2016		
test			

You can rename, delete and change the category of site documents by using the buttons located next to the documents.

You can find any site documents which are used in the audits module by clicking on the documents tab whilst you are in the audits module



# Getting Started - Using the Audit Module

## Obtaining Assistance

Ways to obtain assistance:

Contact the support team at [support@acmsuk.com](mailto:support@acmsuk.com)

(Operating hours 9am – 5pm Monday to Friday GMT)

If you're having trouble viewing the site, please email us with a screen shot of any errors you are getting and we will investigate it for you.

It could be something as simple as enabling a popup blocker or using the right browser for example, Microsoft internet explorer.

For further details please contact

Email: [info@acmsuk.com](mailto:info@acmsuk.com)

Tel: : +44 (0) 844 846 0565

Asbestos Consultancy & Management Services Limited The Lookout, 4 Bull Close Road, Nottingham, NG7 2UL



**Audits Module**