

First Steps



1. To start AuditDesktop, click the  icon on your desktop. The **Login** window will appear.

2. **Program login** is done through the following steps:

2.1. Select the database that you will work with.

2.2. Enter your username and password.

2.3. Click **Login**.



You can also log in the program with your OS credentials, without entering username and password.

If you haven't set a database:

- Click the  button on the **Login** window
- or-
- After logging in, click the **Databases** button in the **Application menu**. You can manage the list of databases in the **Databases** window.

The **Databases** window that will appear allows you to manage your list of databases.

3. Before starting an engagement, it is recommended that you fill in some **organisation data**:

3.1. Open the **Settings** tab.

3.2. Click the **Organisation** button.

4. The program supports several main **Nomenclatures** that facilitate engagement performance. To edit them, go to:

- **Activities** - employees can select their activity type which is used when filling in their timesheets
- **Job positions** - the employees' start and end dates of employment which affect the engagement team selection as well as Strategic and Annual planning
- **Tickmarks** - you can define your own tickmarks which can be used in **Lead schedules** and **File / MS Excel documents**

5. Setting up **System users / Employees** - you can manage both system users and employees who are not using the system, but who will be taken into account during Strategic and Annual planning.

AuditDesktop allows you to add, edit and delete employees, as well as to fill in additional information such as user accounts, job positions, planned leaves, etc.

6. **Method import** - you can use the program's method import function which allows for a quick and simple import of method files.

7. Adding new **Client(s)** - you can add new clients, but also edit, delete and organise your clients into hierarchical groups.



Right click on a client to access the **Client context menu**. Its functions will help you manage client data, select and edit engagements as well as add timesheets.

8. **Create new engagement** - two engagement types are available:

- **Project** - with simplified functionalities
- **Audit** - all available project features, combined with additional, audit-specific functions

9. **Select active engagement** - click the **Select**  button on the main window. To open an engagement, choose one of the following ways:

- Double-click with the left mouse button on the engagement
- Select the engagement and click  **Open**
- Select the engagement and press **F5** on the keyboard



You can use the predefined filters at the bottom of the screen to select the engagement's visibility mode.