

Adding an Existing Document Request to an Internal Audit Project

Last Modified on 09/12/2025 10:44 am EDT

Overview

Users can use an existing document request to a control.

User Account Requirements

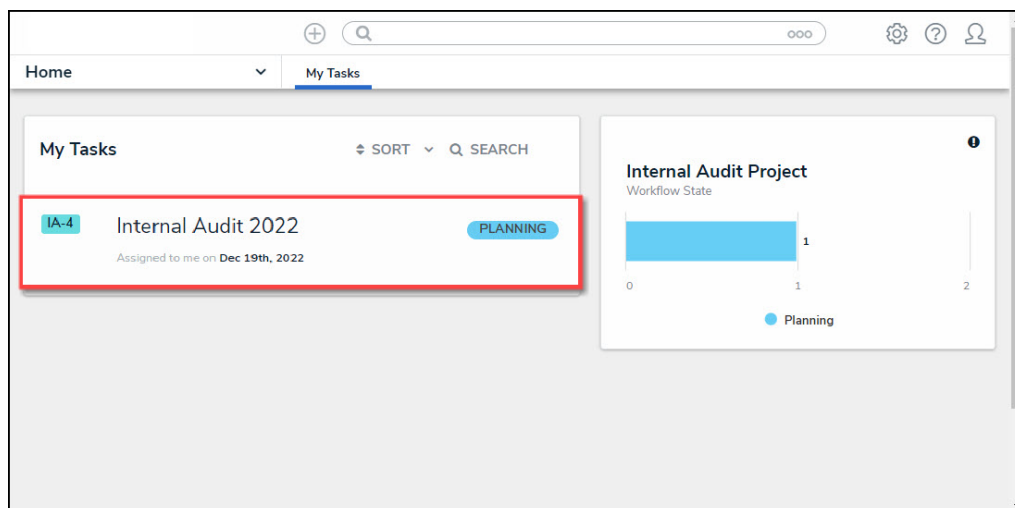
The user account used to log into Resolver must be added to either the Internal Audit Leads or Internal Audit Managers user group.

Required Information/Setup

For further information on how to scope an Internal Audit Project, please refer to the [Define the Scope of an Internal Audit Project](#) article.

Navigation

1. From the **Home** screen, click on an **Internal Audit Project** in the **Planning** stage from the **My Tasks** section.



My Task - Internal Audit Project - Planning

2. From the **Audit Details** screen, click the **Document Request** tab.

The screenshot shows the Resolver interface for 'Operations Audit 2024 Q1'. The top navigation bar includes 'Applications', a search bar, and a user profile icon. The main header shows 'Operations Audit 2024 Q1' with a status 'IA-1' and a 'PLANNING' button. Below the header are tabs for 'Details', 'Relationship Graph', 'History', and 'Communications'. The 'Details' tab is active, showing 'Audit Details' on the left and 'Document Requests' on the right. The 'Audit Details' section includes fields for 'Audit Plan' (2024 Internal Audit Plan), 'Audit Type' (Operational), 'Auditable Entity' (U.S.A.), 'Business Unit' (Operations), 'Audit Client' (Internal Audit Clients (Limited User)), and 'Planned Quarter' (Q1). The 'Document Requests' section on the right has a red box around the 'Document Requests' tab. Below the tab are sections for 'Audit Background', 'Audit Objectives', 'Audit Approach', and 'Audit Scope'.

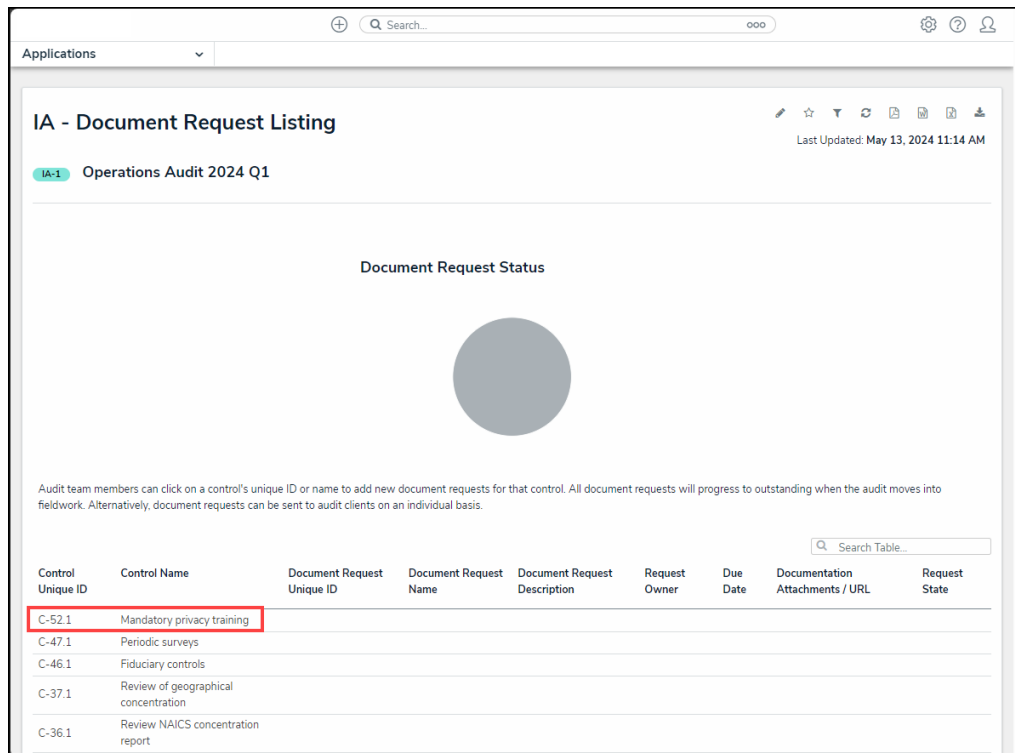
Document Request Listings Button

- From the **Documentation Request** tab, click the **Document Request Listing** button to create and review document requests for the Internal Audit.

The screenshot shows the Resolver interface for 'Operations Audit 2024 Q1'. The top navigation bar includes 'Applications', a search bar, and a user profile icon. The main header shows 'Operations Audit 2024 Q1' with a status 'IA-1' and a 'PLANNING' button. Below the header are tabs for 'Details', 'Relationship Graph', 'History', and 'Communications'. The 'Details' tab is active, showing 'Audit Details' on the left and 'Document Requests' on the right. The 'Audit Details' section includes fields for 'Audit Plan' (2024 Internal Audit Plan) and 'Audit Type' (Operational). The 'Document Requests' section on the right has a red box around the 'DOCUMENT REQUEST LISTING' button. Below the button are instructions for creating and reviewing document requests.

Document Request Listing Button

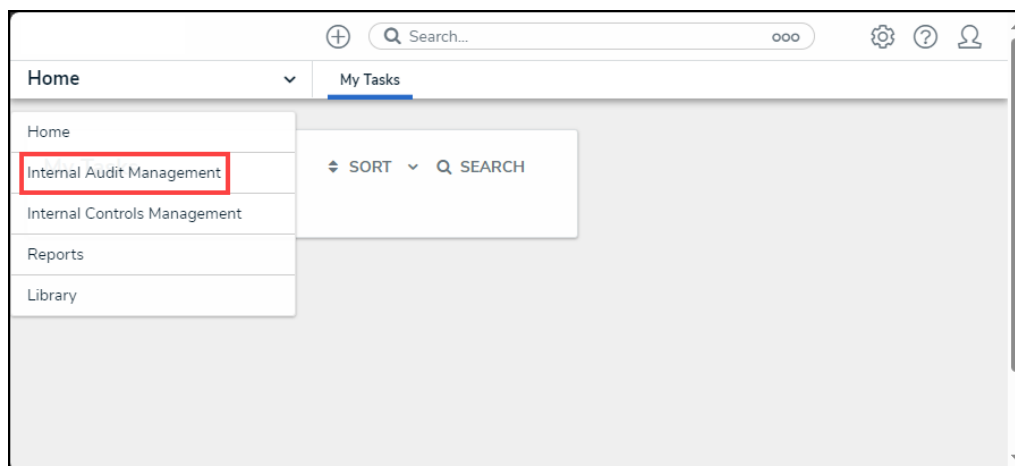
- From the **Document Request Listing** screen, click a **Control**.



Click on a Control

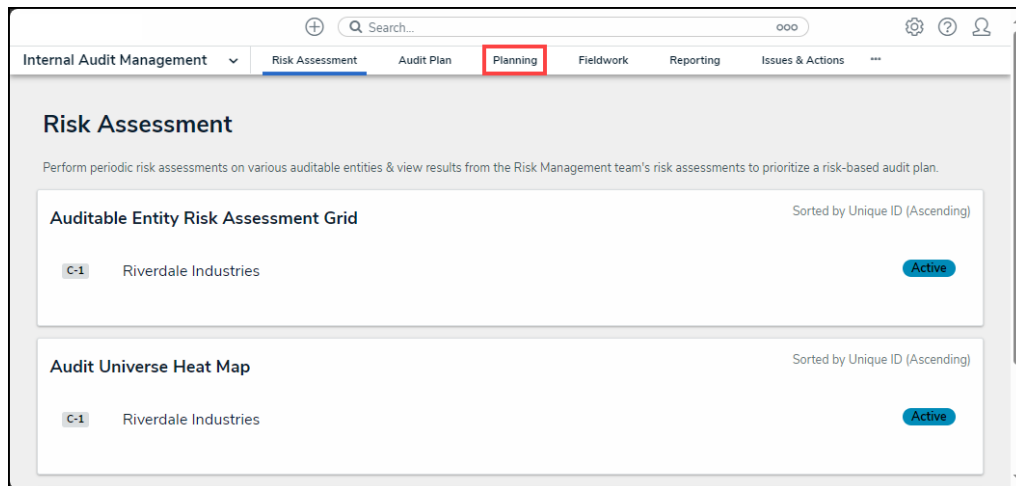
Alternate Navigation

1. From the **Resolver Home** screen, click the **Home** dropdown and select the **Internal Audit Management** link.



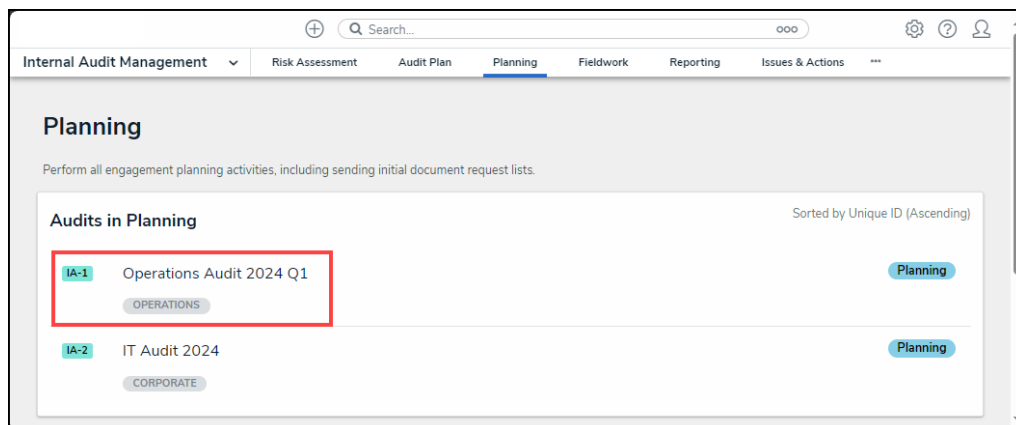
Home Drop-Down

2. From the **Risk Assessment** screen, click on the **Planning** tab.



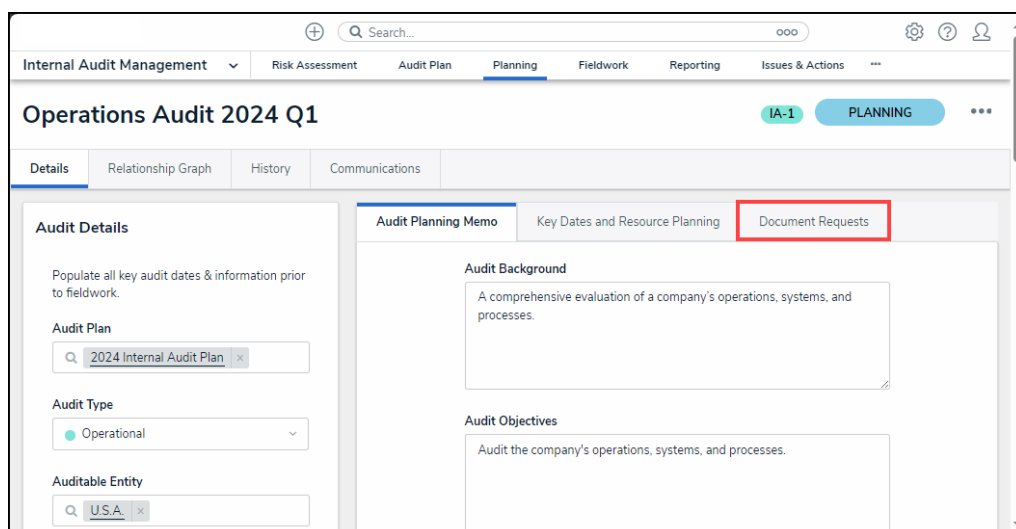
Planning Tab

- From the **Planning** screen, click the **Create Audit Project** button.



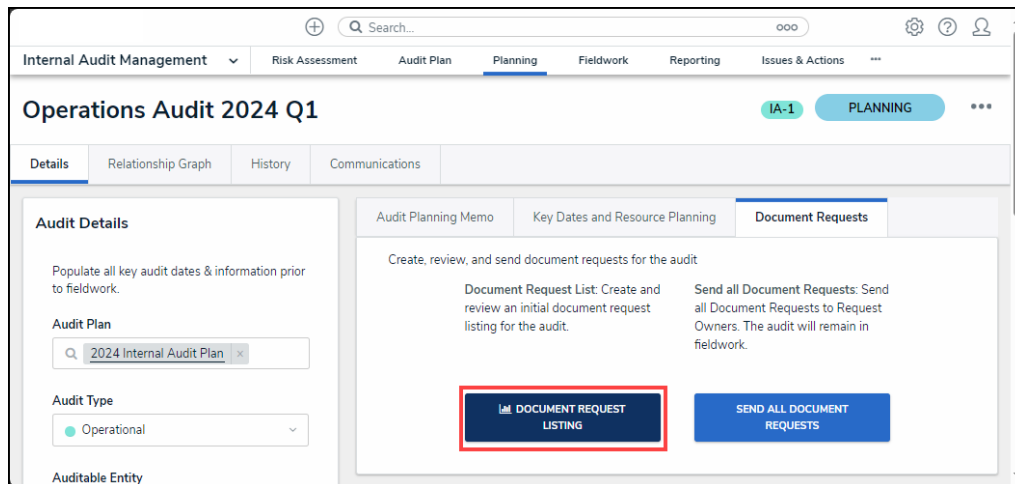
Create Audit Project Button

- From the **Intern Audit Project** screen, click the **Document Request** tab.



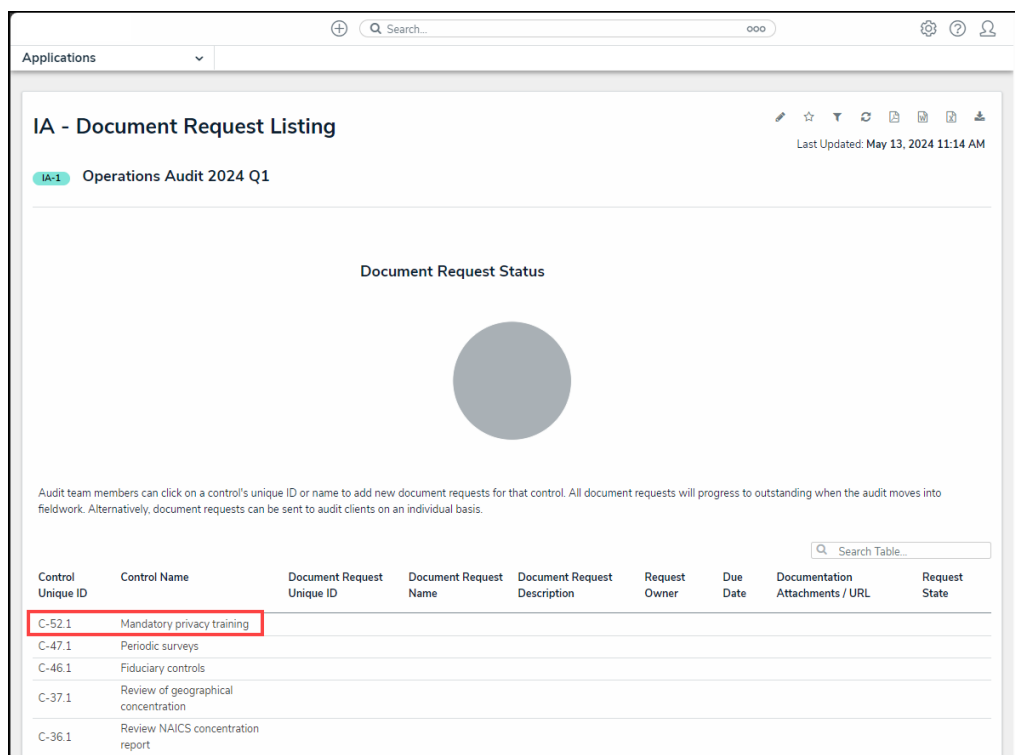
Document Request Tab

- From the **Documents Request** tab, click the **Document Request Listing** button.



Document Request Listing Button

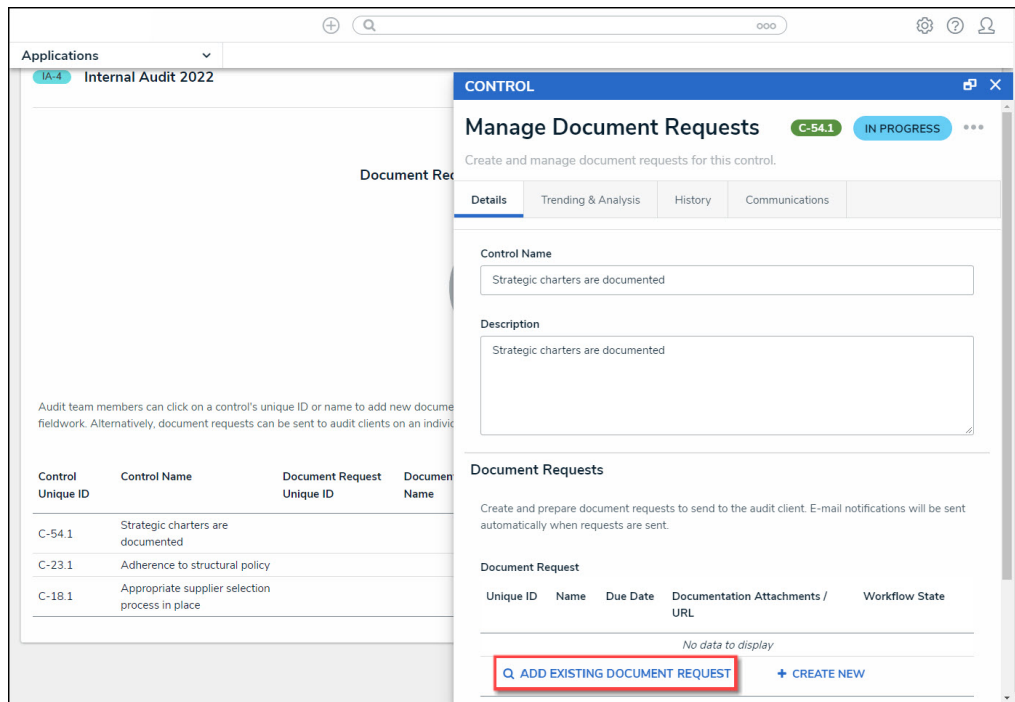
- From the **Document Request Listing** screen, click a **Control**.



Click a Control

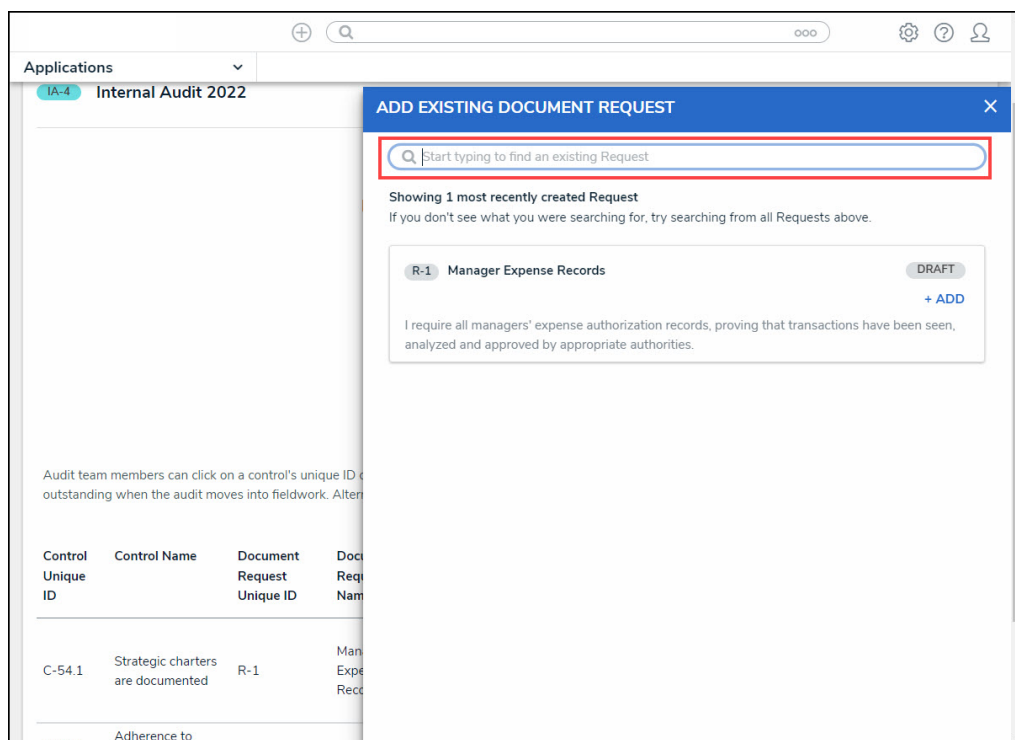
Adding an Existing Document Request

- From the **Manage Document Request** pop-up, click the **Add Existing Document Request** button.



Add Existing Document Request Button

- From the **Add Existing Documentation Request** pop-up, all recently created document requests are listed. Enter key search terms in the **Search** field if the document request you are looking for is not listed.



Search Field

- When you have located the document request, click on the **+ ADD** link to add the

document request to the Control.

Applications

IA-4 Internal Audit 2022

ADD EXISTING DOCUMENT REQUEST

Q Start typing to find an existing Request

Showing 1 most recently created Request

If you don't see what you were searching for, try searching from all Requests above.

R-1 Manager Expense Records

DRAFT

+ ADD

I require all managers' expense authorization records, proving that transactions have been seen, analyzed and approved by appropriate authorities.

Audit team members can click on a control's unique ID or document request unique ID to view details or add a document request. Document requests are outstanding when the audit moves into fieldwork. Alternatively, you can click on a control's unique ID to view details or add a document request.

Control Unique ID	Control Name	Document Request Unique ID	Document Request Name
C-54.1	Strategic charters are documented	R-1	Manager Expense Records
C-23.1	Adherence to		

+ ADD Link