

Auditing & Task Assignment Application for Ambersand Group



Introduction

An organization responsible for auditing 36 schools, sought an efficient system to streamline their auditing processes. The primary goal was to leverage Zoho Creator to develop customized dashboards and implement role-based calendar systems, accessible on mobile devices, to enhance operational efficiency and auditing accuracy.

Challenges

1. Manual processes in auditing led to inefficiencies.
2. Lack of role-specific dashboards for various auditor types.
3. Difficulty in managing audit schedules for monthly, quarterly, and annual tasks.
4. Need for seamless assignment and tracking of user roles and functions.
5. Ensuring compliance through user acceptance testing (UAT) before implementation.

Solutions Implemented

1. Zoho Creator Customization

- Developed personalized dashboards for mobile and desktop, tailored to each auditor role.
- Implemented a user allocation system to manage specific tasks across 36 schools.

2. Role and Function Management

- **Monthly Auditors (School Auditors):** 36 users per school, each assigned specific functions such as Admin, IT, Finance, etc.
- **Quarterly Auditors (School Principals):** One user per school overseeing all functions.
- **Cluster Auditors:** Five users managing specific functions across multiple schools.
- **Yearly Auditors (Vertex Auditors):** 36 users managing annual tasks.

3. Calendar System

- Designed role-specific calendars for monthly, quarterly, and yearly auditors to manage tasks and schedules effectively.

4. User Acceptance Testing (UAT)

- Conducted comprehensive UAT to validate system functionality against Ambersand requirements.
- Successfully pushed the system live after Ambersand approval.

Key Benefits

- 1. Improved Efficiency:** Automated workflows reduced manual effort and streamlined auditing processes.
- 2. Enhanced Accuracy:** Customized dashboards minimized errors and ensured precise task execution.
- 3. Role-Specific Management:** Tailored functionalities empowered auditors to perform their roles effectively.
- 4. Convenience:** Mobile accessibility ensured seamless management of tasks anywhere, anytime.
- 5. Compliance:** Thorough UAT ensured system reliability and adherence to Ambersand needs.

Conclusion

The project successfully delivered a customized auditing system for Ambersand, leveraging Zoho Creator to enhance operational efficiency. Personalized dashboards and role-based calendars empowered auditors to maintain high standards across 36 schools, setting a new benchmark for auditing processes in educational institutions.