

## SPI Online - Training tips to help create SPI Online accounts and audits

If you conduct a training on SPI Online, please follow this guide to help the trainees creating an audit to test the platform.

Your trainees need to follow the following steps to create an account on SPI Online so it is easier for you and for us to follow their first steps. Trainees will be able to reuse their account after the training.

Please give these instructions to the trainees :

To start on SPI Online, the steps are the following:

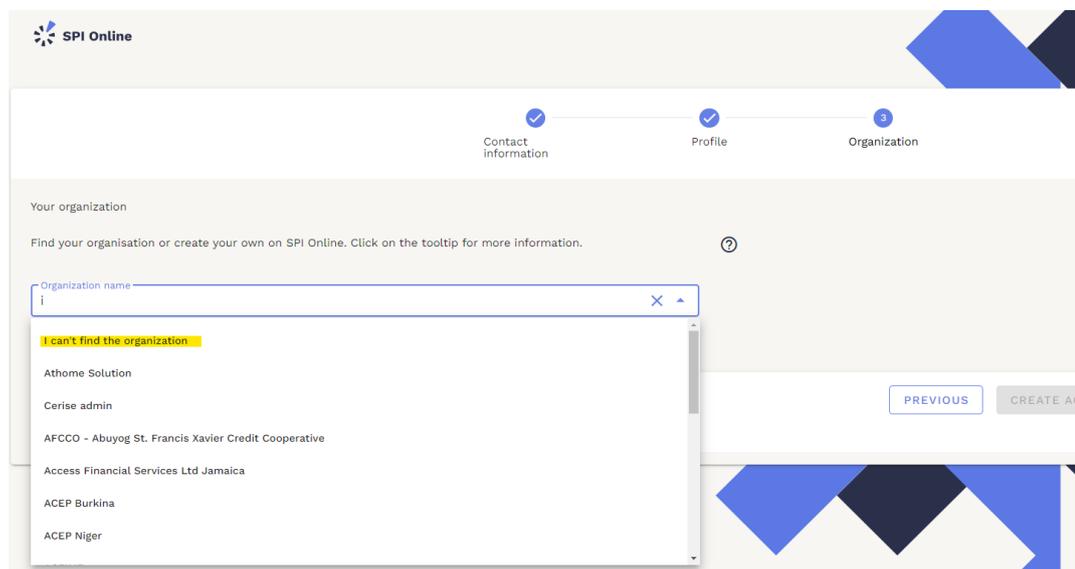
- **Sign up or log into [SPI Online](#).** We recommend you to use your professional e-mail address.

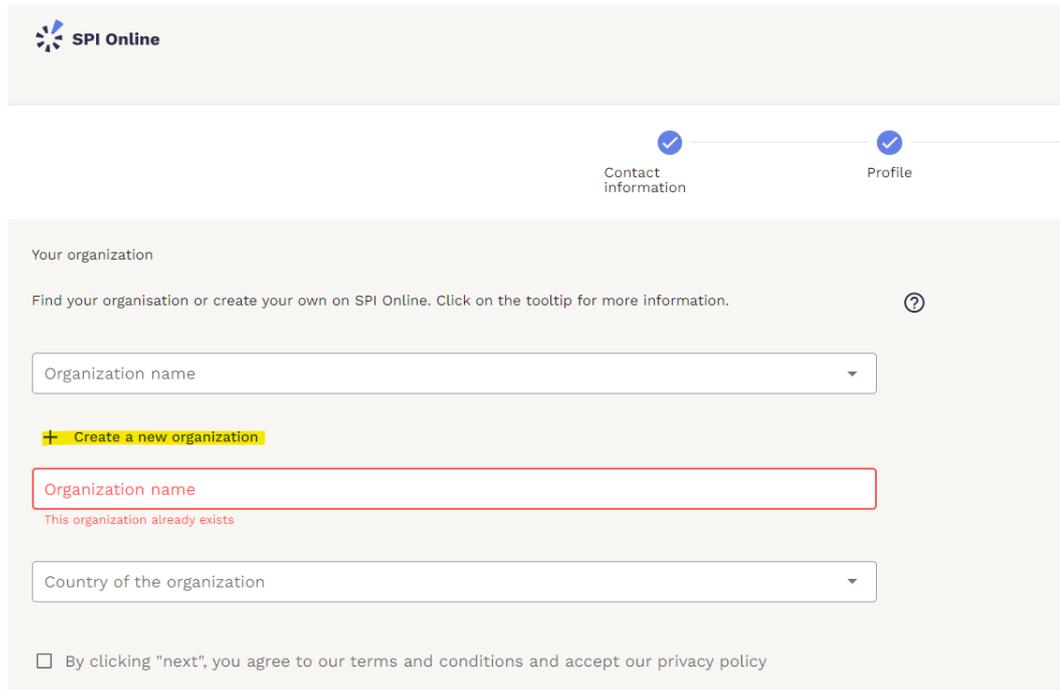
If you don't have an account yet on SPI Online :

- **If your organization already exists in SPI Online:** in step 3 "Organization", select your organization from the drop-down list when creating your account. Your organization's administrator will have to validate your demand to be a member of the organization for your account to be activated.

- **If your organization doesn't exist in SPI Online :**

- **if you work for an FSP, to create your organization** in the signing up process : in Step 3, enter a letter and select "I can't find the organization" from the drop-down list of organizations in SPI Online. Click on the "+ Create a new organization" that appears. You must enter the name and the country of your organization. You will receive an email to activate the account on SPI Online. If you create your organization, you will become its default administrator (focal point).





- **if you work as an independent:** when creating the account, in step 1 “Profile”, select “Independent auditor”. In step 3 “Organization”, create an organization either by:

- entering your name if you are an independent consultant

-entering the name of your company if you have a company in your name

>> You can click on the question mark  to guide you through the process.

- **Create a new audit** by following the tunnel of creation during/ for the training:
  - In step 1 “Audit Type”, choose “**Mock**”.
  - In step 2 “Audit tool”, choose **SEPM Pathway or CP Pathway** (depending on the training content/ trainor demand) > **choose your tool**.
  - In step 3 “Methodology”, choose “**Formation/Training**”.
  - In step 4 “Information”, enter the following information:
    - Audit information (i.e. the name of your audit): “**NAME OF THE AUDITED ORGANIZATION \_YOUR NAME\_YYYYMM**”
    - The Auditing Organization: **your organization name** in SPI online or **your name if you are an independent consultant** (and thus the name of your organization is the same as your name in SPI online)
    - The Audited Organization: **please choose the organization “Test”** (!! **If your organization is a Financial Service Provider**, you will not be able to select “Test”. In that case, please put here **your organization name again**. And add your trainor email in the “Invited by email” section in Step 5).

- Activities: choose the activities that the organization proposes. The activities will add specific indicators to your audit.
  - o In step 5 “Sharing settings”, choose the following settings:
    - Auditing organization: “can edit the settings and answers”
    - Audited organization: “can edit the settings and answers”
    - Owner organization: “can edit the settings and answers”.
    - Add your trainor’s email in the “Invited by email” section
  - o In step 6 “Data” to select the authorization level, tick only the **first box**.
  - o In step 7 “Summary”, check information and validate.

>> You can watch this [tutorial video](#) to help you familiarize yourself with the tool.

- Once you have finished, close the audit, **export the SPI Flat** and **download the SPI Report** (detailed dashboards of results).
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If you have account issues, please look up our [FAQ](#) or write to [support@spi-online.org](mailto:support@spi-online.org).