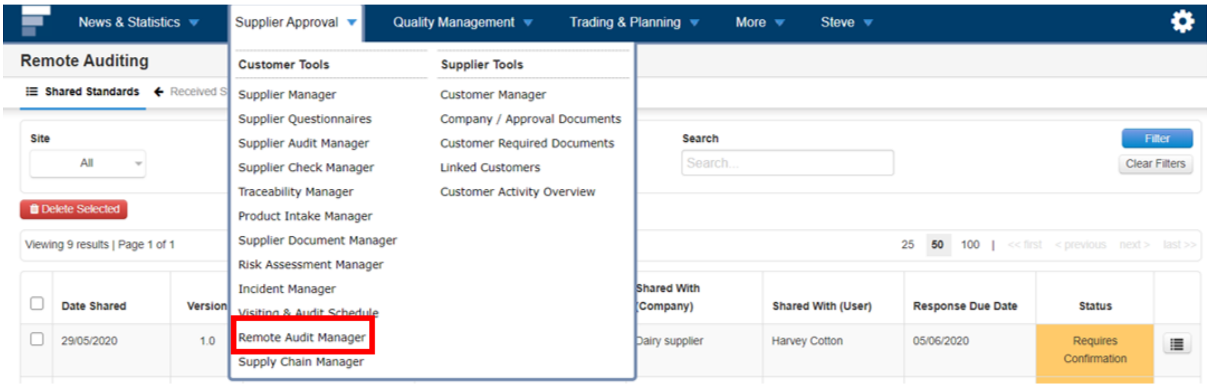
TOOL USER GUIDE

REMOTE AUDIT MANAGER

CONTENTS

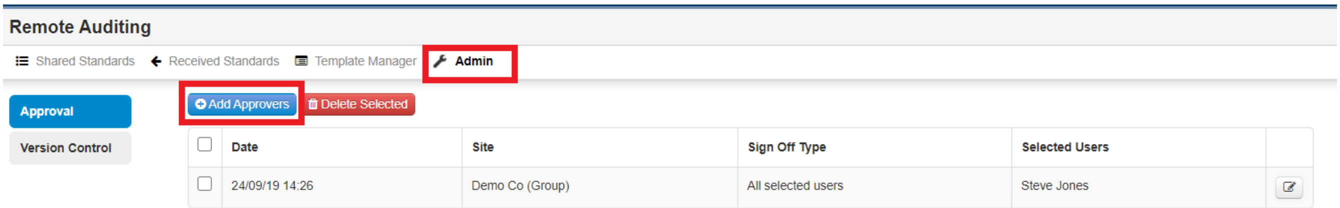
1. INITIAL SET UP

Step 1: Sign in and go to the *Remote Audit Manager*

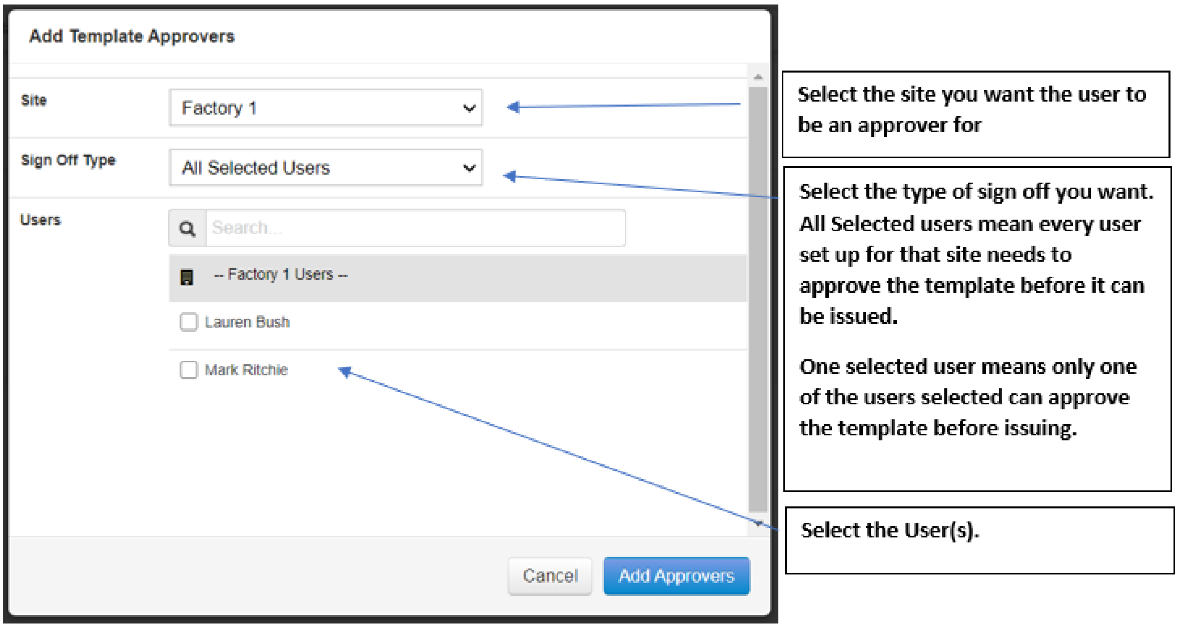


1.1 APPROVERS

Step 1: Select the *Admin* tab and click on the *Add Approvers* button.



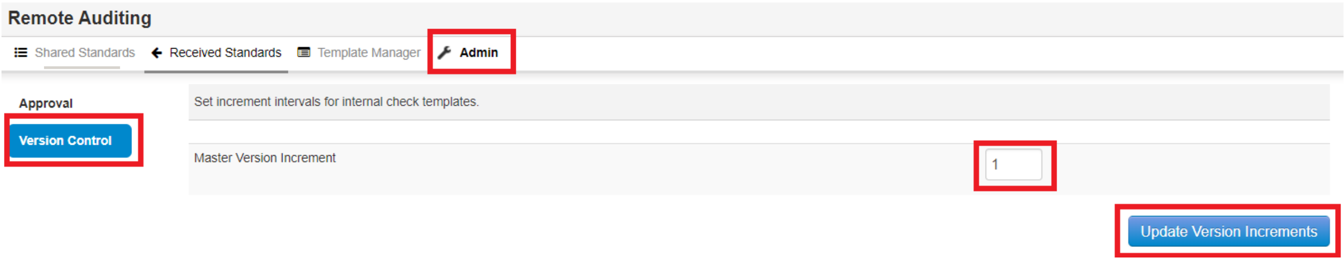
Step 2: Select the approvers you want to approve the audit templates per site and press *Add Approvers.*



1.2 VERISON CONTROL

Step 1: Select the *Admin* tab and click on the *Version Control* button.

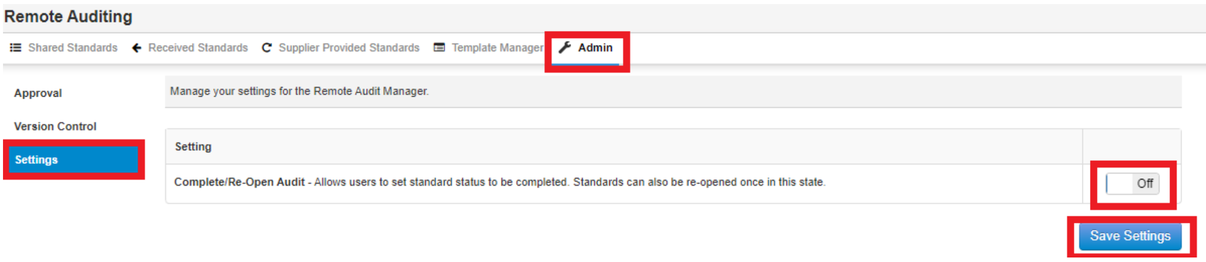
Step 2: Set the version number you want the templates to start at and press *Update Version Increments.*



1.3 SETTINGS

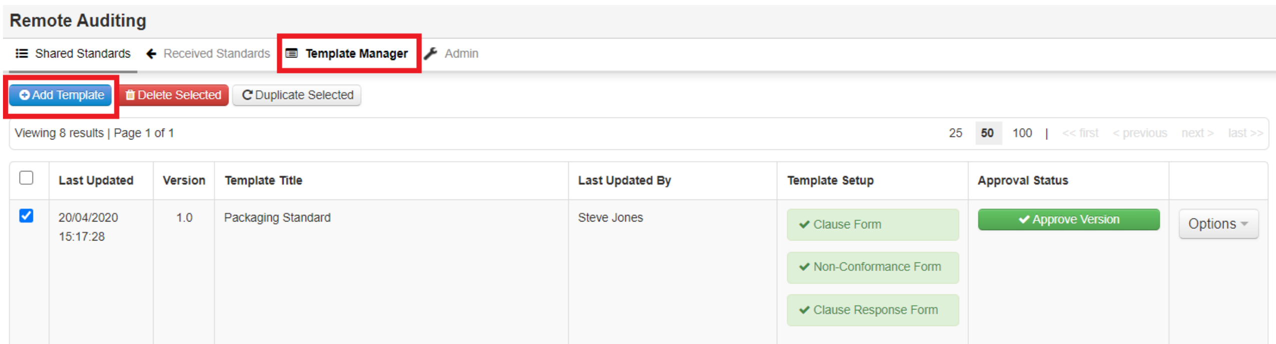
Step 1: Select the *Admin* tab and click on the *Settings* button.

Step 2: Select the toggle to 'On' to have the option of setting a standard as 'Completed' or the ability to 'Re-open' and audit.



2. CREATING / EDITING STANDARD TEMPLATE

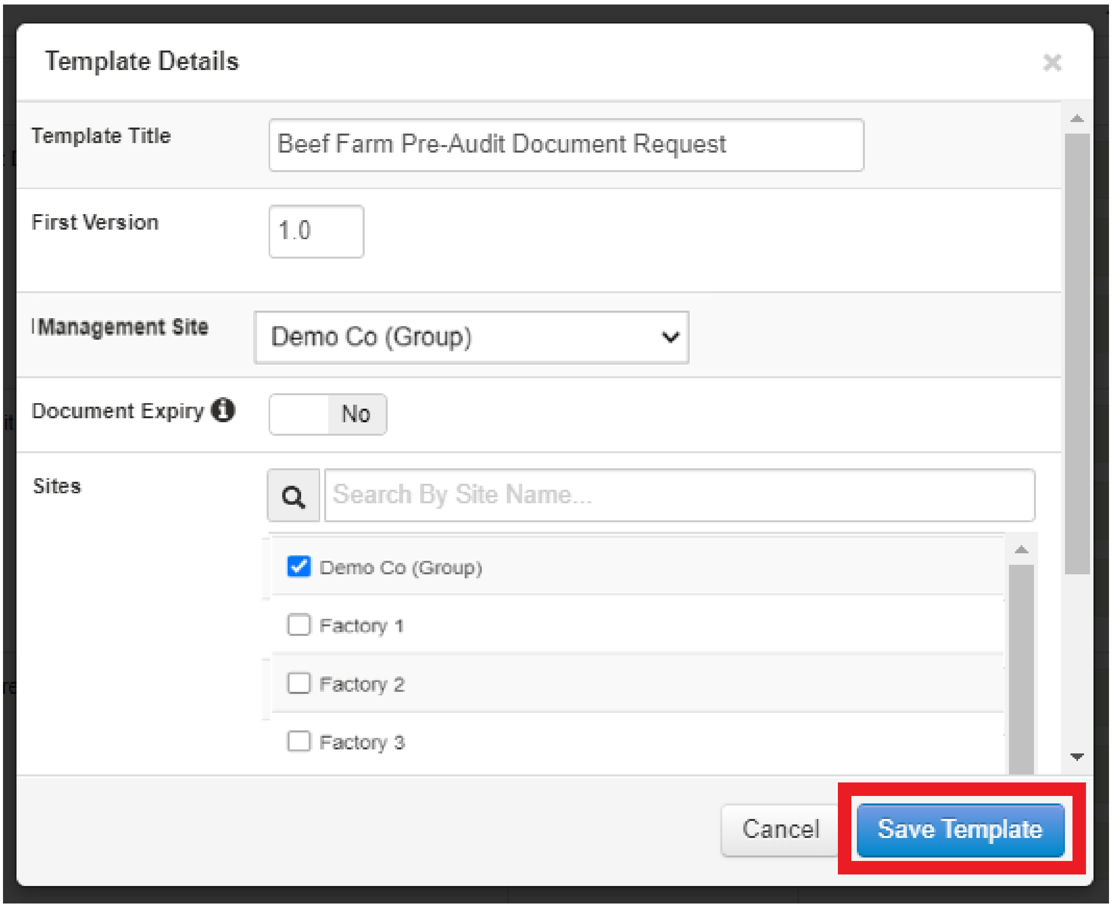
Step 1: Select the *Template Manager* tab and click on *Add Template.*



2.1 TEMPLATE DETAILS

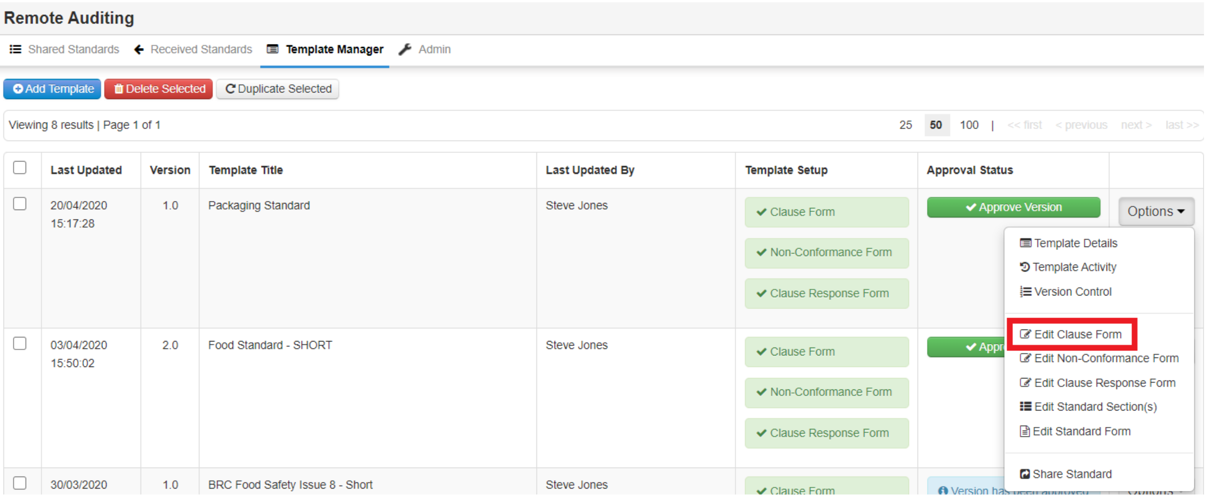
Step 1: Fill out the template details modal with the name of the template, the site that manages the template, if you want the documents shared to expire and the sites it relates to and press *Save Template.*

NB. If Document Expiry is selected, the evidence attached to remote audits once confirmed & approved will expire and no longer visible.



2.2 CLAUSE FORM

Step 1: Click on the options button for the new template and select *Edit Clause Form*.

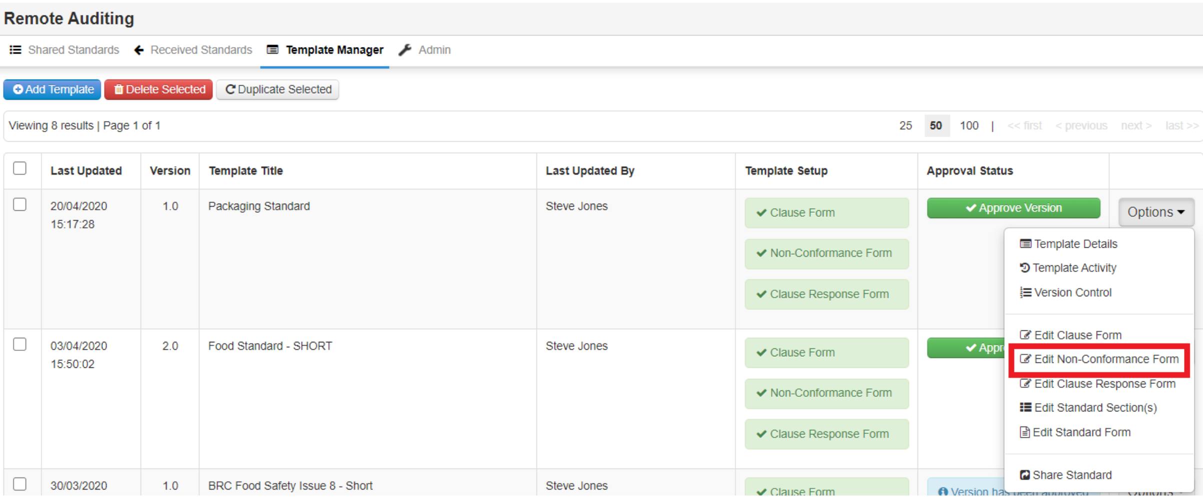


Step 2: Create the clause template form by using form builder (On how to use form builder please refer to the Form Builder user guide).

Step 3: Once you are finished with building your clause form press the *Back* button.

2.3 NON-CONFORMANCE FORM

Step 1: Click on the options button for the new template and select *Edit Non-Conformance Form.*

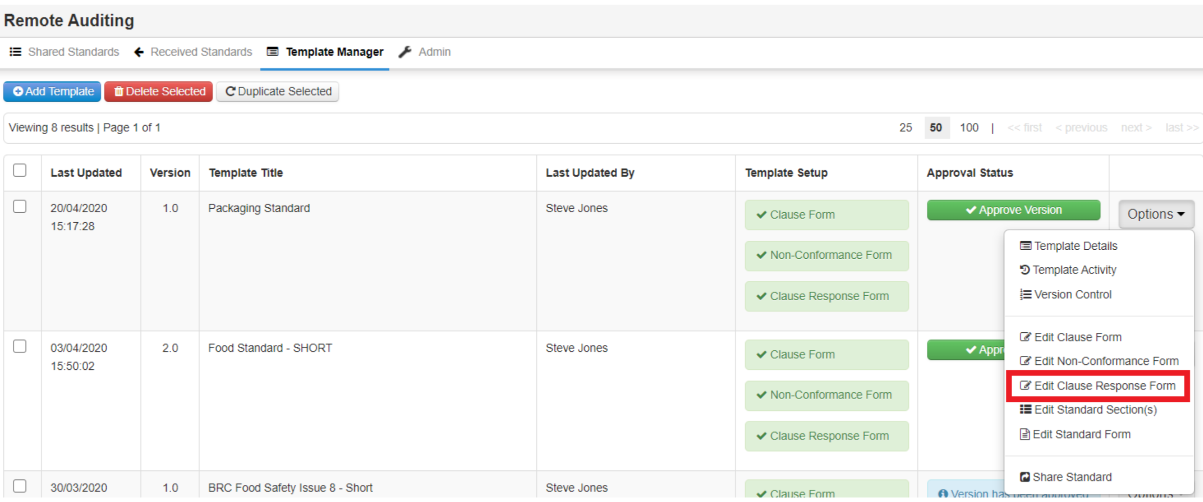


Step 2: Create the Non-Conformance template by using form builder (On how to use form builder please refer to the Form Builder user guide).

Step 3: Once you are finished with building your clause form press the *Back* button.

2.4 CLAUSE RESPONSE FORM

Step 1: Click on the options button for the new template and select *Edit Clause Response Form.*

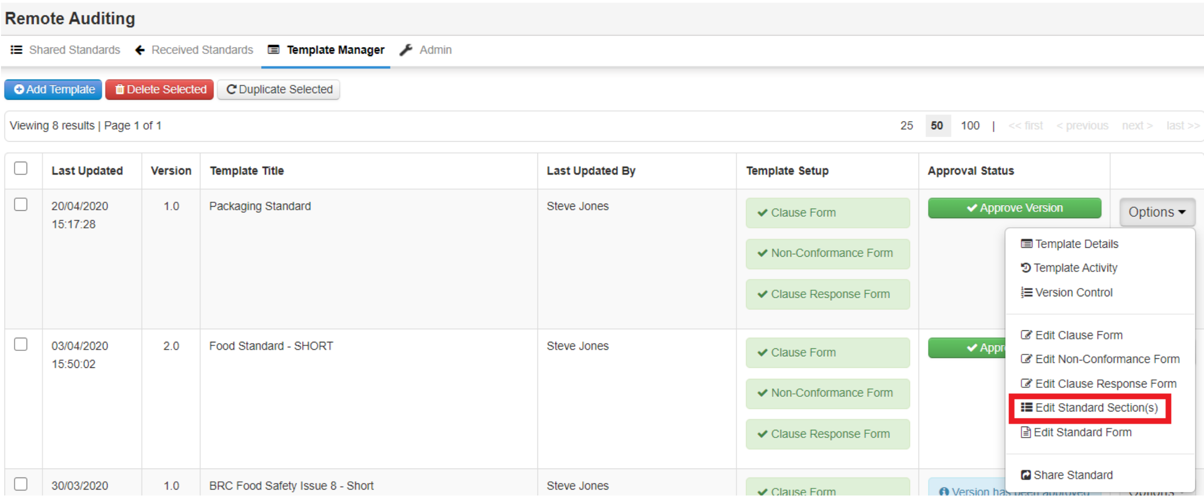


Step 2: Create the Clause Response template by using form builder (On how to use form builder please refer to the Form Builder user guide).

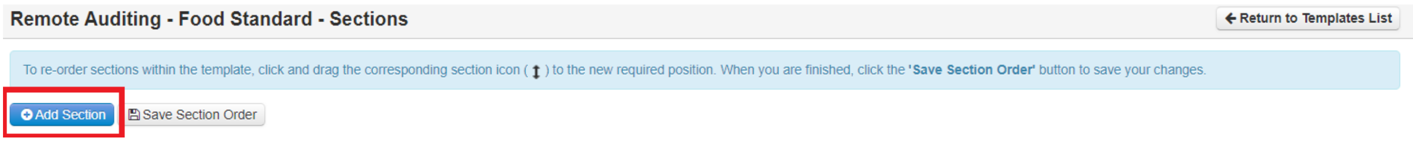
Step 3: Once you are finished with building your clause form press the *Back* button.

2.5 STANDARD SECTIONS

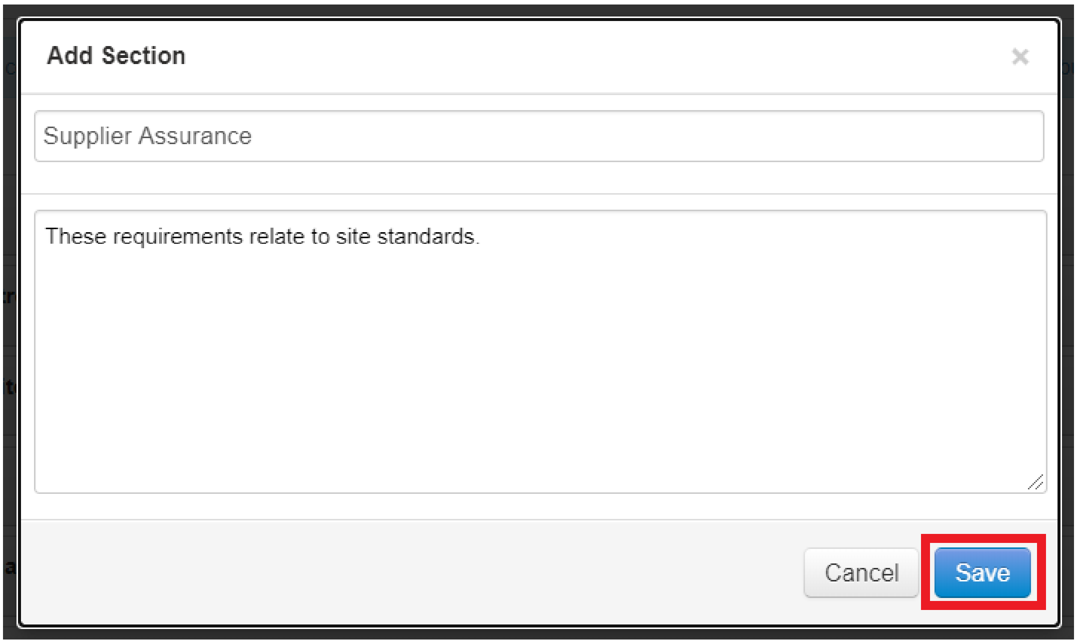
Step 1: Click on the options button for the new template and select *Edit Standard Section(s).*

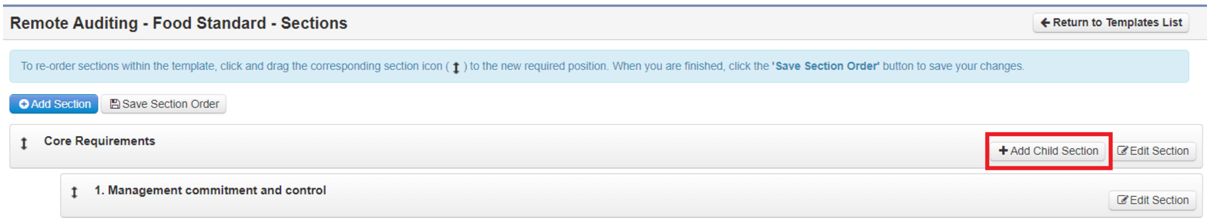


Step 2: Click on *Add Section* to add the sections of the standard.



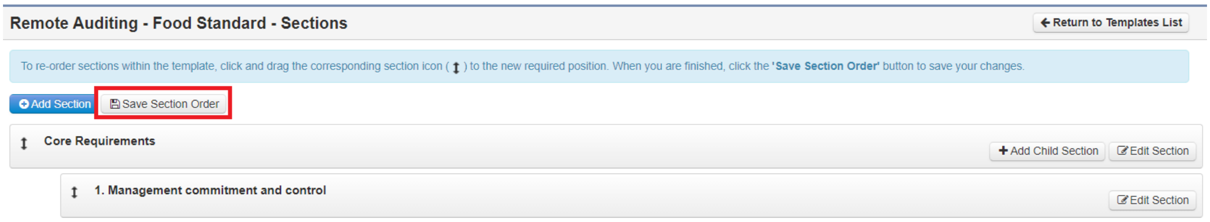
Step 3: Enter the sections title and an introduction to the section if relevant and press *Save.*





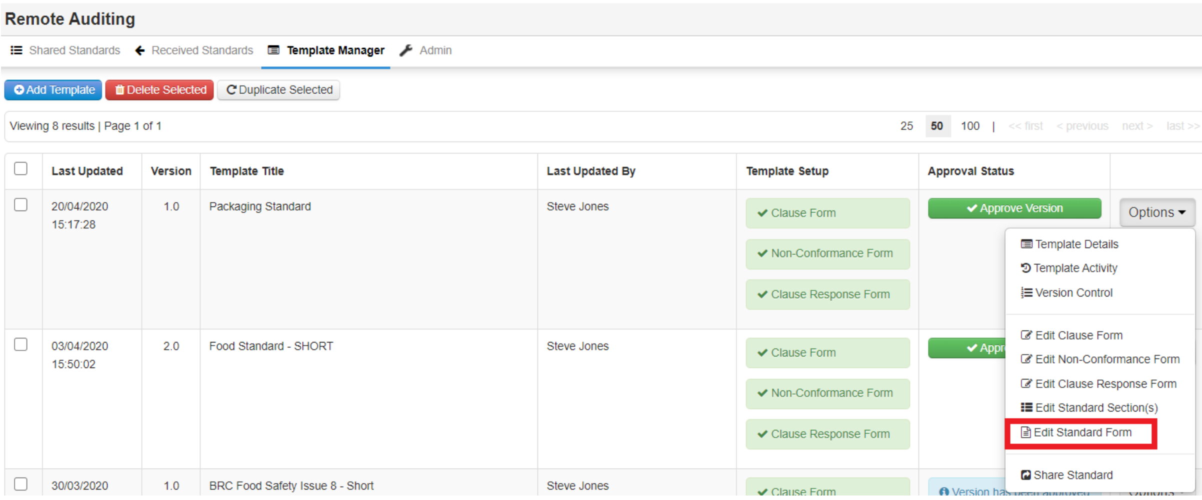
Step 4: Add Child sections to the parent section if relevant. Clicking the *Add Child Section* against the parent section and follow Step 3.

Step 5: The parent sections can be reordered by dragging them to the correct position taking the associated child sections with it. The children sections can only be rearranged in their parent section. Once all sections are arranged in order press *Save Section Order.*

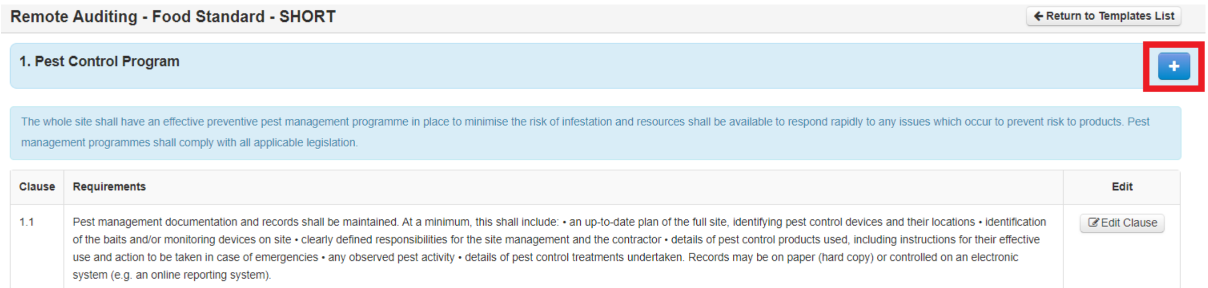


2.6 STANDARD FORM

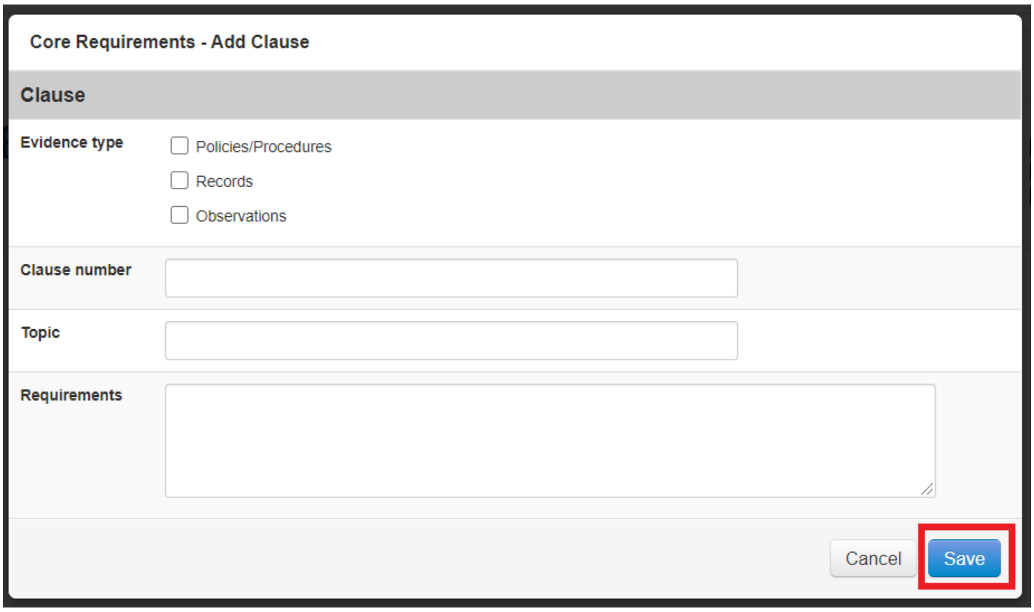
Step 1: Click on the options button for the new template and select *Edit Standard Form.*



Step 2: Add the clauses by selecting the blue plus sign against each section.



Step 3: Fill out the Clause template that you created in point 2.2 Clause form and press *Save*.



Step 4: Continue adding clauses until the template is finished.

2.7 APPROVING STANDARD

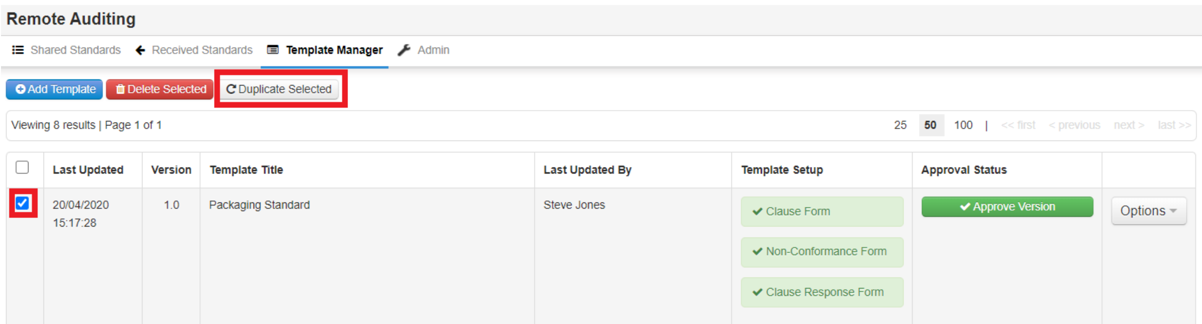
The standard must be approved by the set-up approver(s) before it can be shared to a supplier. This then starts the version of the remote audit standard to 1.

Step 1: Set-up approver(s) clicks the Green *Approve Version* button.

If more than one approver is required to approve the standard, then you must wait until all approvers have approved before sharing to suppliers.

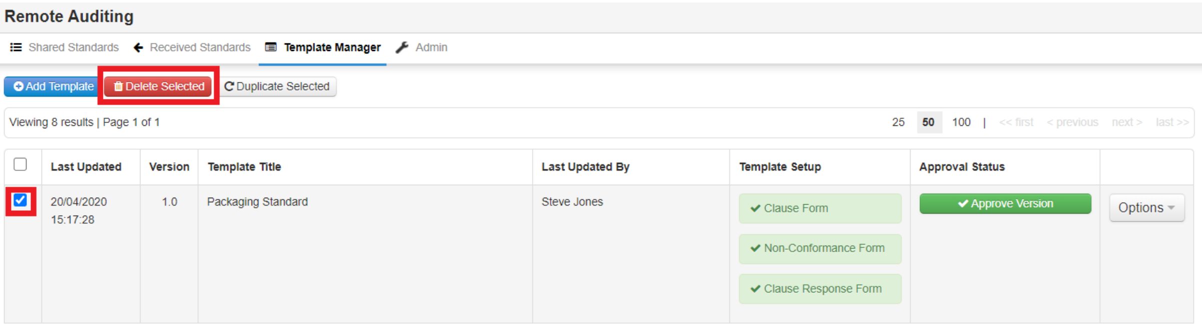
2.8 DUPLICATING STANDARDS

Step 1: Select a similar template you have previously created by ticking the box and press the *Duplicate Selected.*



2.9 DELETING STANDARDS

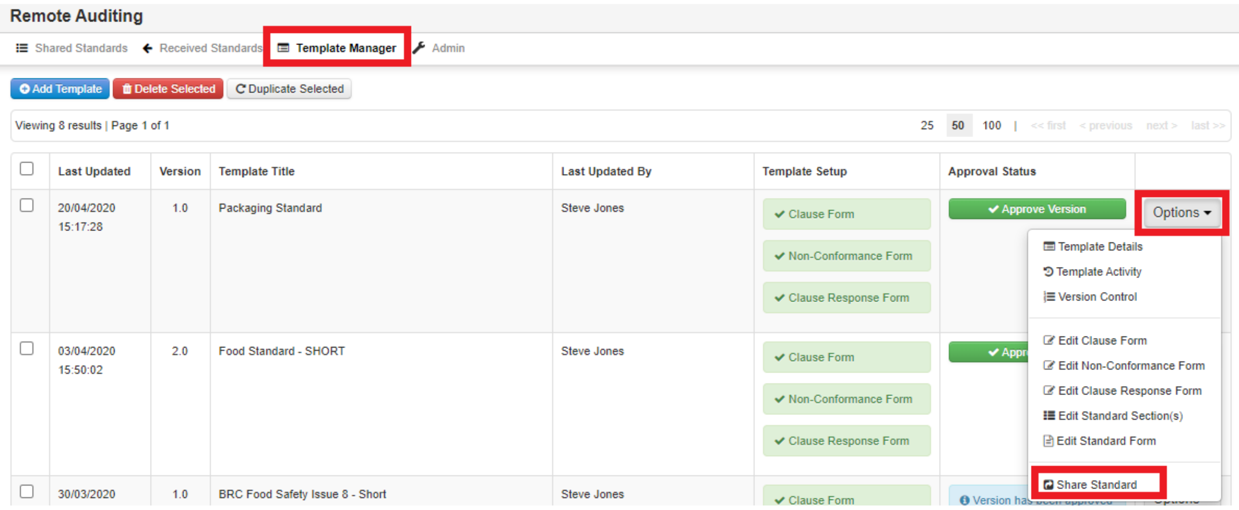
Step 1: Select the template you want to delete and press the *Delete Selected* button.



3. SHARING STANDARD TEMPLATE

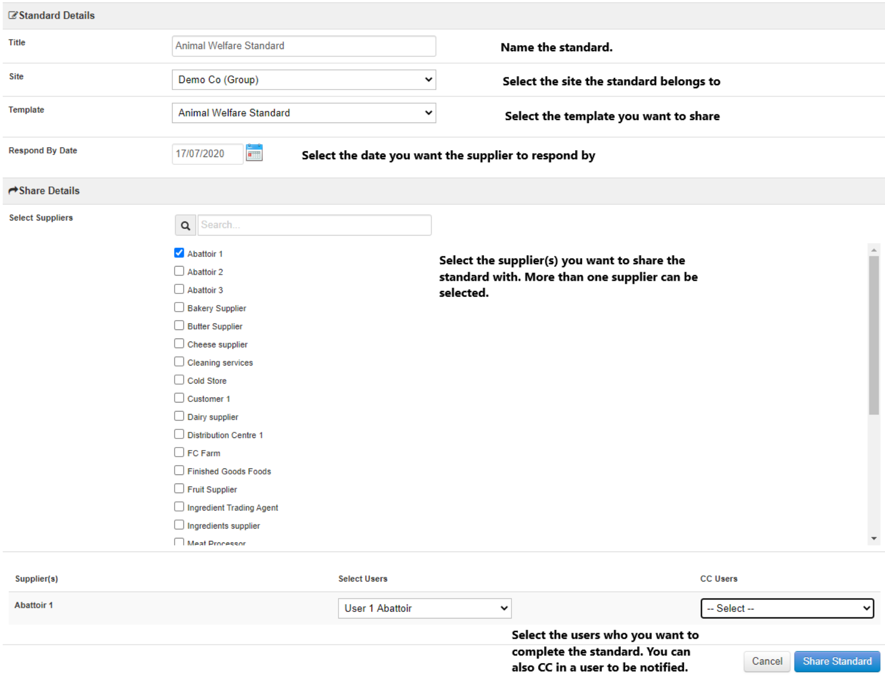
Once the remote audit is built you can share the standard within your company or to suppliers to complete. All shared audits are available in the 'Shared Standards' Tab.

Step 1: In Template Manager select *Options* button against the relevant approved remote audit template and select *Share Standard.*



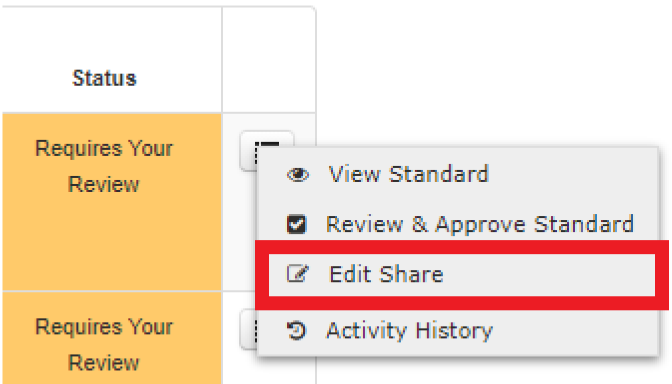
Step 2: Fill in the standard details, the supplier you want to share the standard with and the user you want to notify and click the *Share Standard* button.

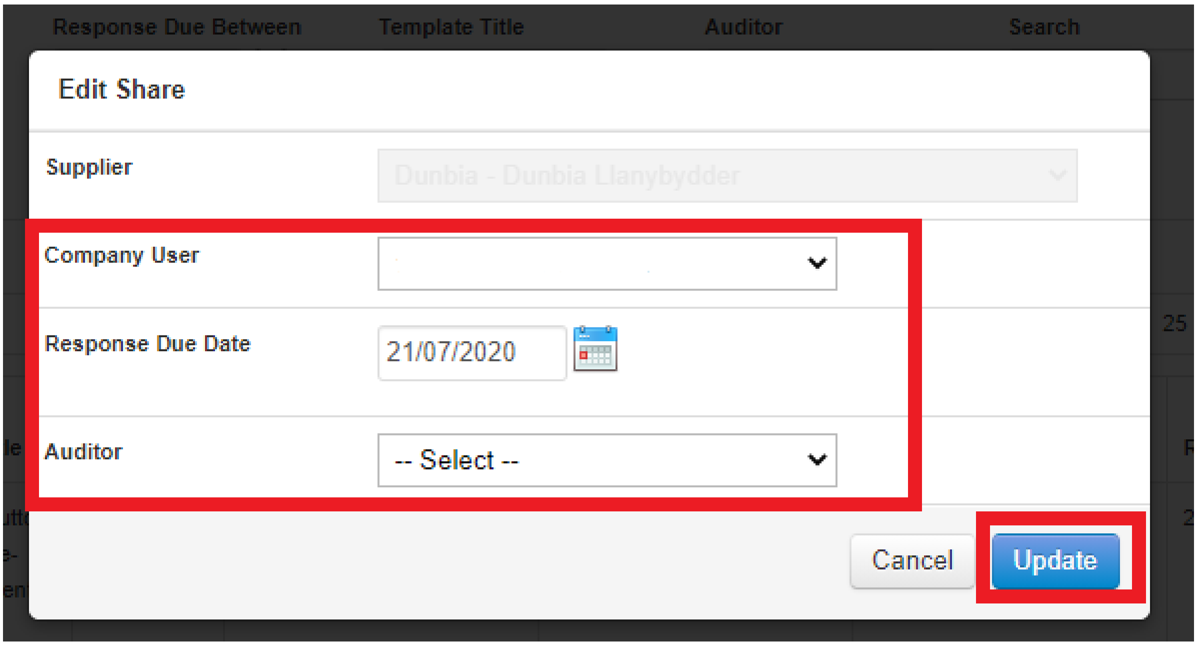
The user you shared the standard with will be notified via email and a task generated in their task bar.



Alternatively, you can select to send to the agent of that supplier if you have supplied via set up in Supplier Manager (Please refer to Supplier Manager Guide to set up supplied vias).

Step 3: Once the standard is shared you can change the Recipient, Due Date and Auditor by selecting 'Edit Share' against the shared standard in the 'Shared standard' section.



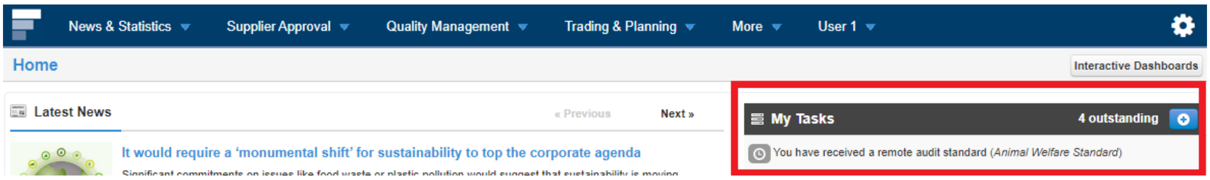


4. RECEIVING A SHARED STANDARD

You will be notified by email and a task will be generated when a remote audit standard has been shared with you.

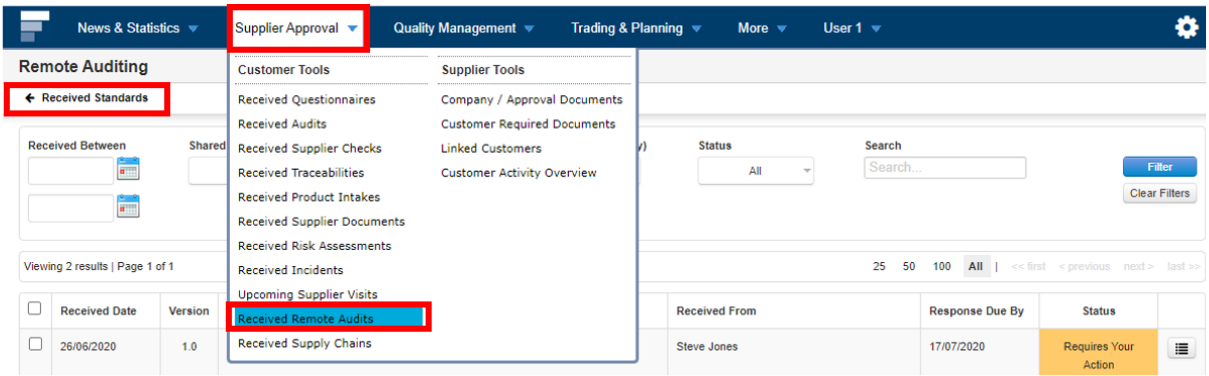
4.1 ACCESSING STANDARD

Step 1: Access the shared standard by clicking on the task in *My Task* tool bar and this will take you to *Received standards.*

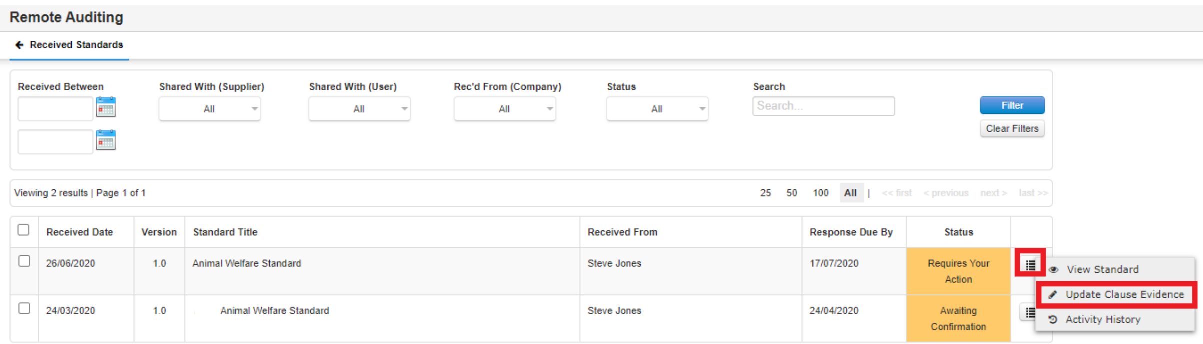


OR

Step 1: Select *Received Remote Audits* from the *Supplier Approval* tab and select the *Received standards* tab. If you have no subscription to Remote Audit Manager, it will take you straight to the Received standards tab.



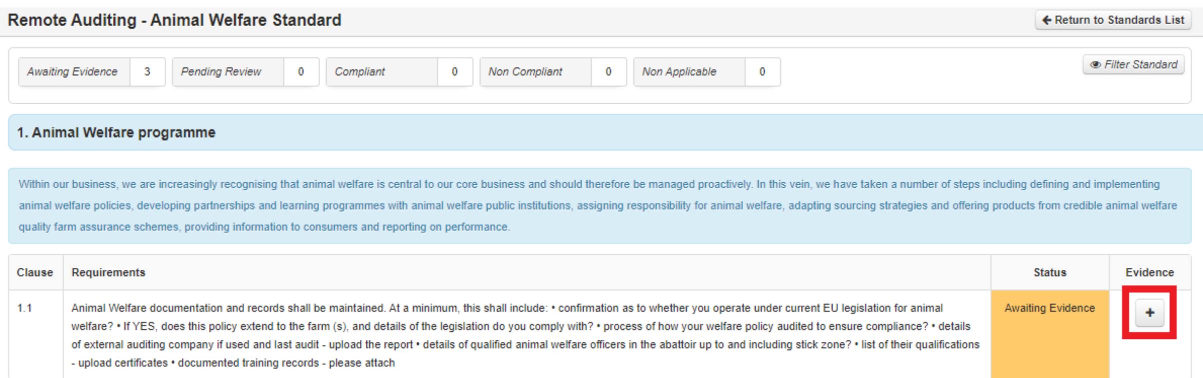
Step 2: Click on the Icons button and select *Update Clause Evidence.*



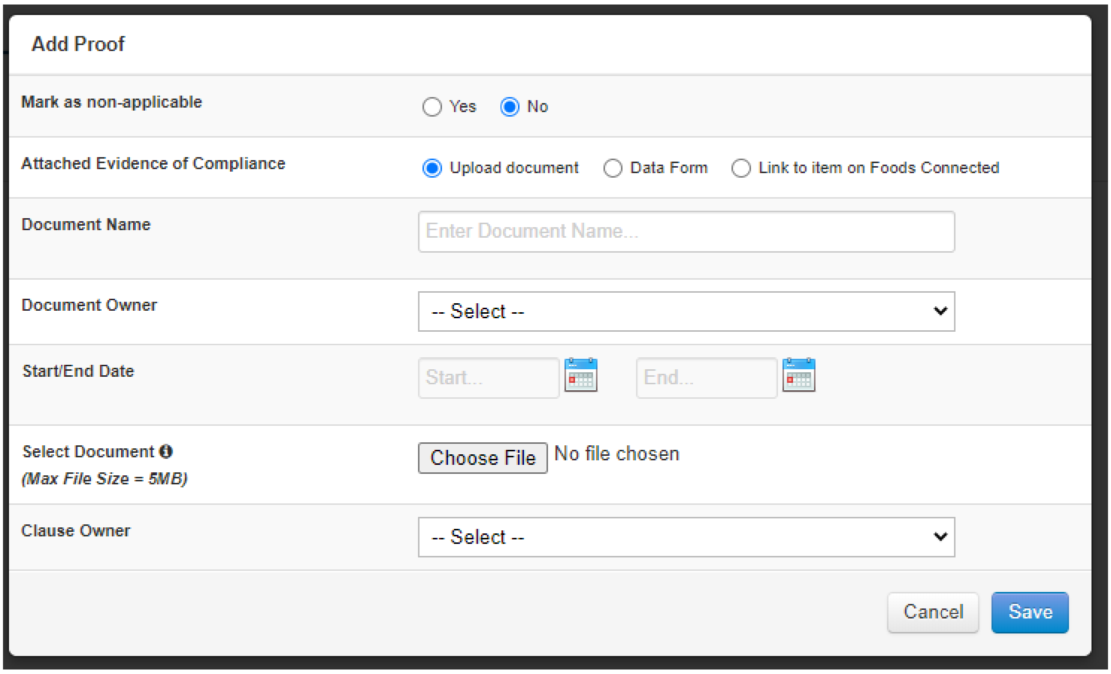
4.2 UPLOADING EVIDENCE

There are 3 options you can chose from when uploading evidence; upload document, data form & link to item on Foods Connected. You can upload as many types of evidence you want to a single clause to show your compliance.

Step 1: Click the '+' button beside the clause you want to upload evidence to.



Step 2 – Document Upload: A Modal will pop up for you to select what evidence you are uploading. If uploading a document, the following modal will show. Fill out the detail and press *Save.* If you want to attach more evidence to this clause press the 'Save & Add New' button.



***Mark as non-applicable**:* If the clause is not applicable to your site select *Yes* and fill in the reason why.

Attached Evidence of Compliance: Select *Upload Document*

Document Name: Name your document

Document Owner: Select the user that is the owner of this document.

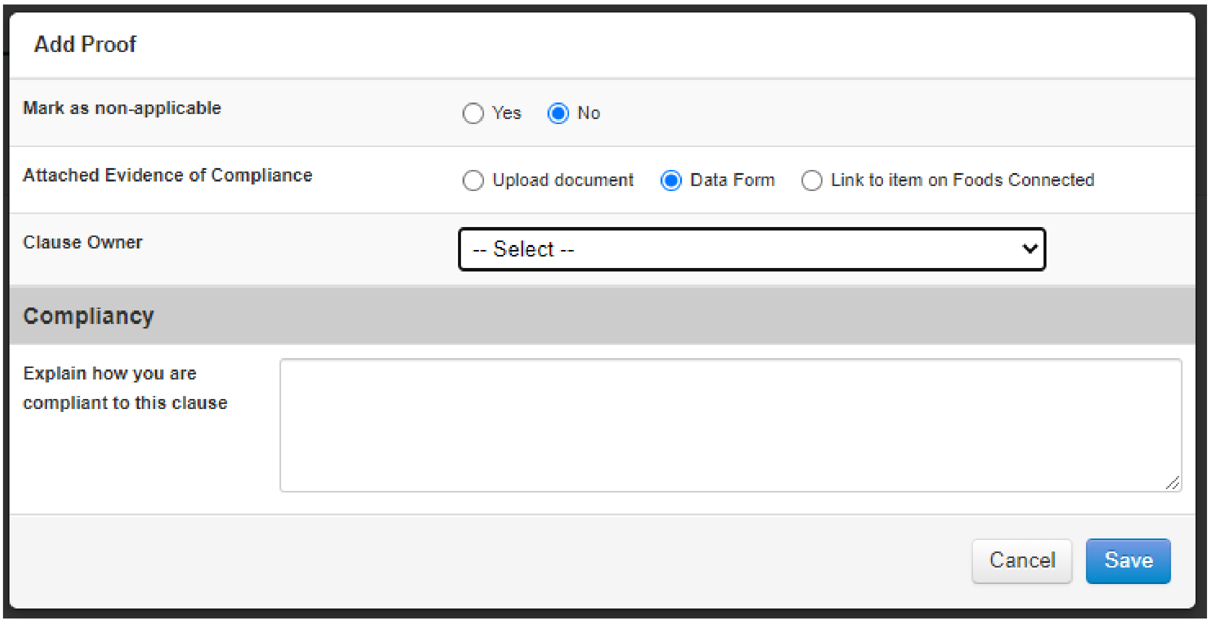
Start/End Date: Select when the document starts and expires.

Select Document: Upload the document, picture, or video.

Clause Owner: Select the user that will be the owner of that clause.

Step 2 – Data Form: The following modal will show if completing the Data form. NB. This view can change due to the set up of the data form on the customer side.

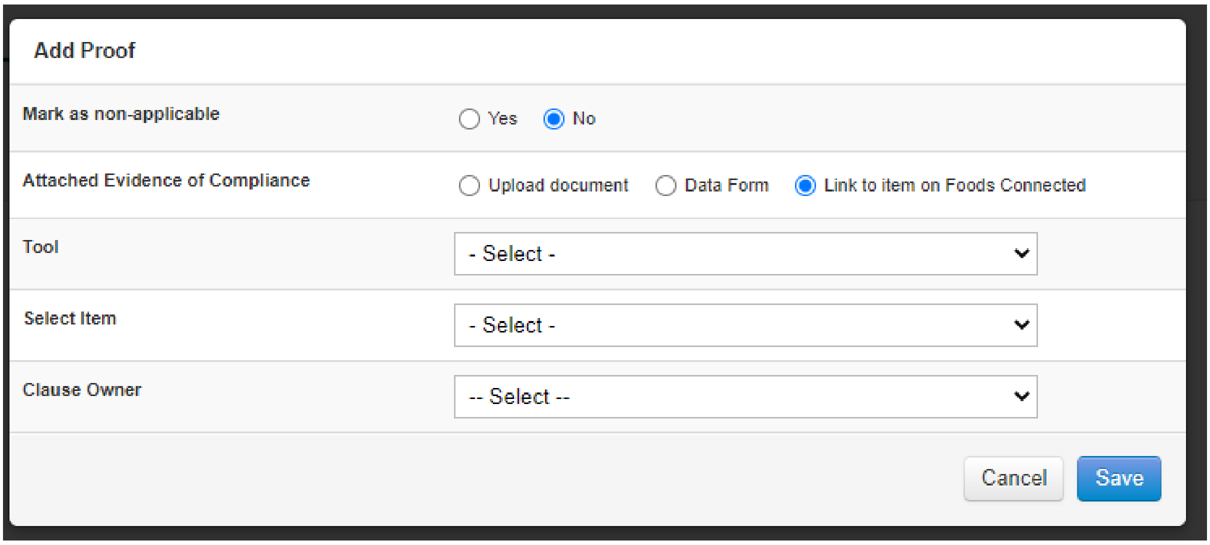
Fill in the data form that the customer has created and press the *Save* button. This will attach as evidence to the clause.



Step 2 – Link to item on Foods Connected: The following modal will show if linking an existing document on Foods Connected to the clause.

Select the tool you want to link to e.g. document manager and select the item that is available in your document manager.

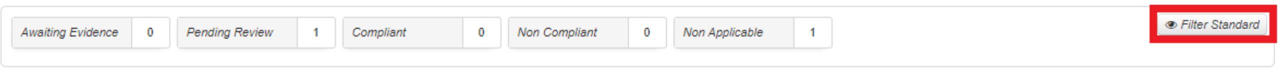
Select the clause owner and press *Save.*



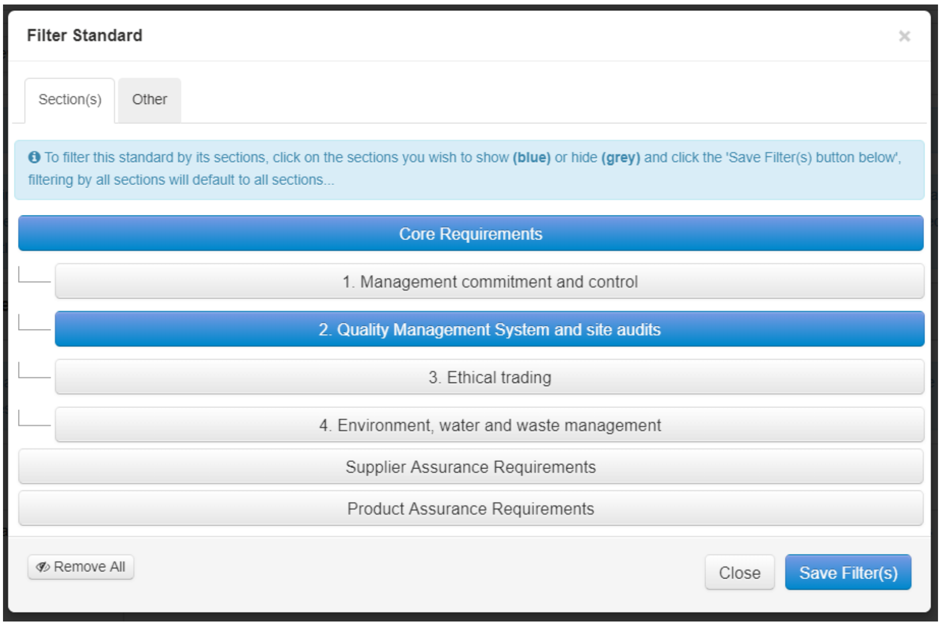
4.3 FILTERING BY SECTIONS

This allows the user to filter the standard by sections, sub-sections, clause status and evidence status.

Step 1: Select *Filter Standard* at the top of the page in the selected standard.

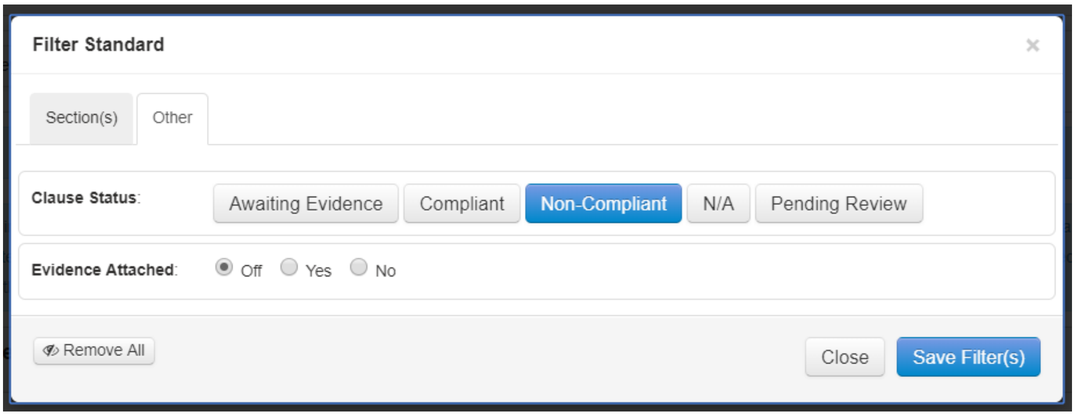


Step 2: To filter by sections click *Section(s)* tab in the pop-up modal and select which parent and child section you want to filter to.



OR

Step 2: To filter by clauses or evidence click the *Other* tab in the pop-up modal and select the type of status and/or if evidence is attached and press *Save Filter(s).*



Step 3: To clear the filters click *Remove all* at the bottom of the pop-up modal.

4.4 SUBMITTING FOR REVIEW

Once all evidence is attached to all clauses or non-relevant clauses marked as N/A, you can submit the standard for review. The submit for review button will be greyed out until all clauses have evidence attached to them.

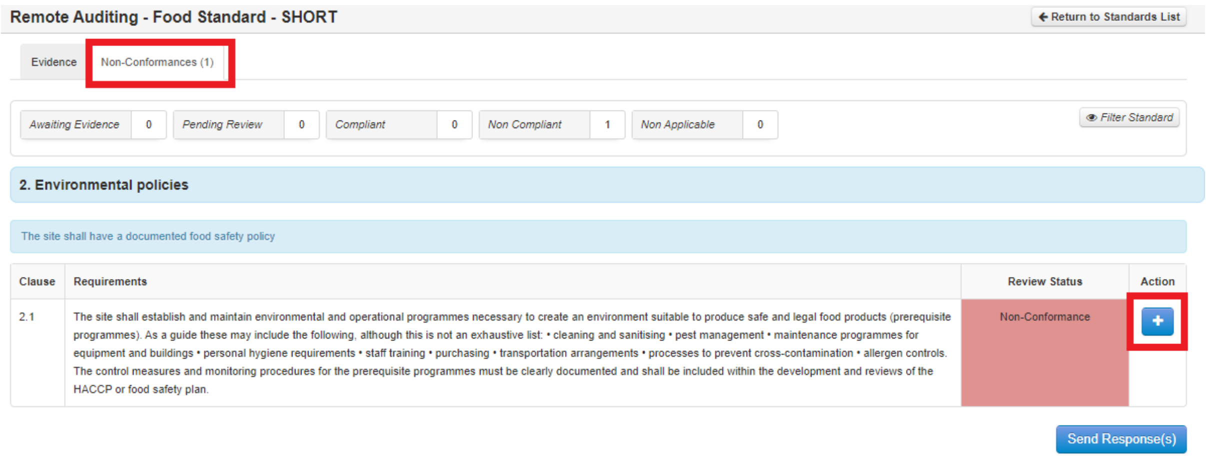
Step 1: Click *Submit for Review* button at the bottom of the page.

This will send the standard back to the customer for review and change the status of the standard from *Requires your Action* to *Awaiting Action.*

4.5 RESPONDING TO NON-CONFORMANCES

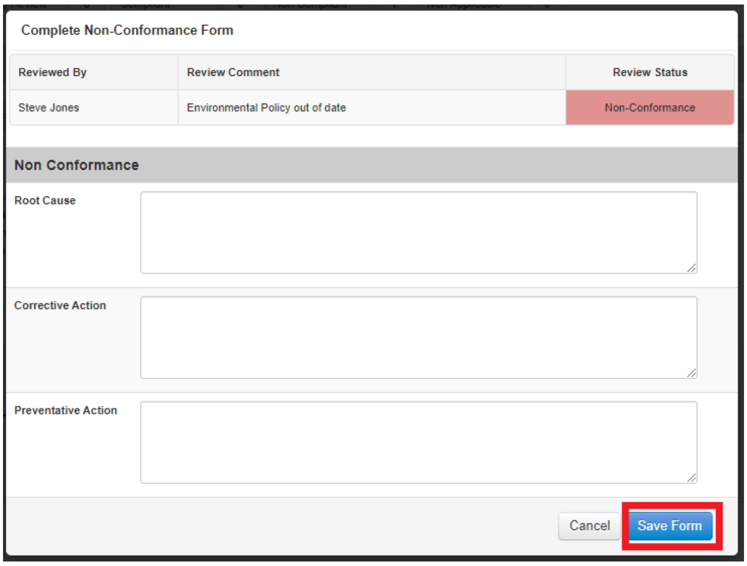
Step 1: Select the *Non-Conformance* tab at the top of the Remote Audit Standard (This will only be available if there are non-conformances against the standard).

Step 2: Click the '+' button under action against the clause.



A modal will pop-up with the non-conformance comment and a form for you to respond to the non-conformance.

Step 3: Fill in the non-conformance response template and press *Save Form*.

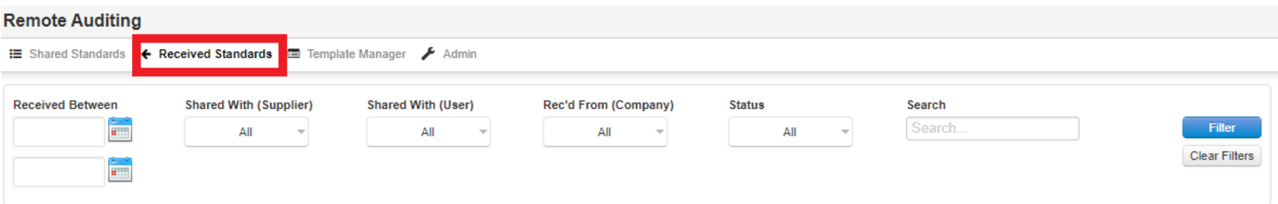


Step 4: Once all the clauses have been updated and the Non-conformance form has been complete you can then send the remote audit standard back by pressing the *Send Response(s)* button.

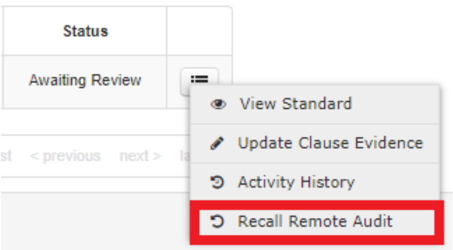
5. RECALLING A SHARED STANDARD

When a standard has been shared back with the customer for review, you can recall the standard back. This can only be done with shared standards that have a status of 'Awaiting Review'

Step 1: Navigate to the 'Received Standards' tab.



Step 2: Select the icon button against the shared standard you want to recall with a status of 'Awaiting Review' and select 'Recall Remote Audit'.



Step 3: When the standard has been recalled the status will revert to 'Requires Your Action' and any tasks generated for the customer to review will be removed.

Status	
Requires Your Action	

6. REVIEWING & APPROVING

Step 1: Click on the new task in *My Tasks* and this will take you to the *Shared Standard* or select *Remote Audit Manager* within *Supplier Approval* tab and navigate to the *Shared Standard* tab.

Step 2: Click the icon button against the standard that 'Requires Confirmation' and select *Review & Approve Standard.*

6.1 REVIEWING CLAUSE EVIDENCE

NB. If the document expiry toggle is selected when setting up the template details, then the shared evidence from the supplier will expire after the audit is reviewed and confirmed.

Step1: Click the magnifying glass icon to view the evidence attached to a clause.

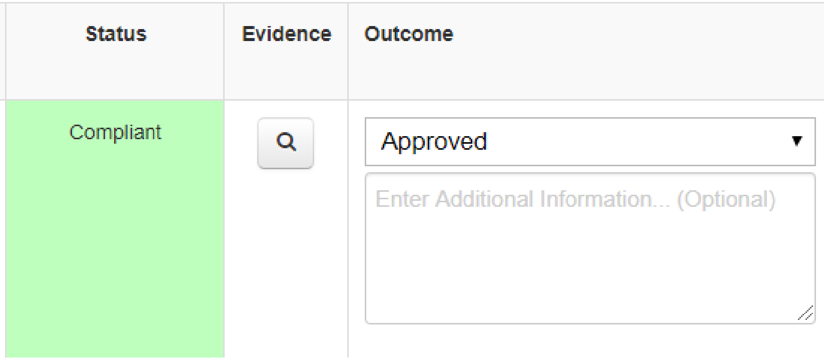
6.2 SELECTING OUTCOMES

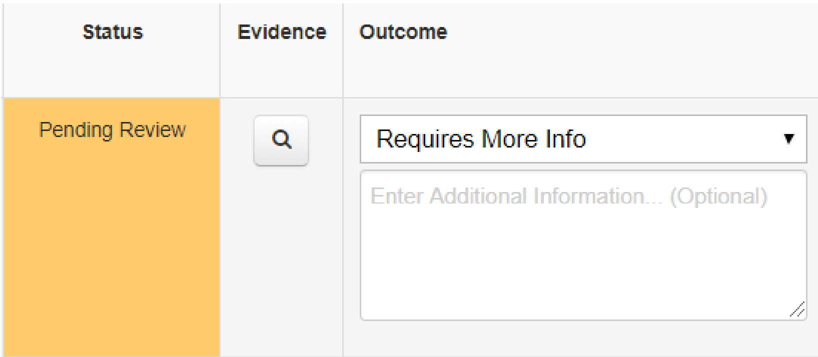
Step 1: In the outcome section select from the dropdown whether the evidence is Approved, Requires more information or Non-conformance.

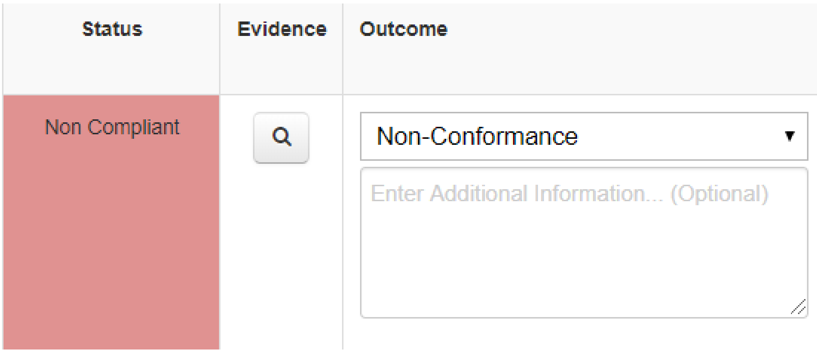
Step 2: Enter your comment about the evidence and compliancy in the comments section under the outcome dropdown. This comment is tracked will appear under the clause with the date, reviewer name, comment, and status for the supplier to view.

Evidence Type	Clause Number	Topic	Requirements	Status	Evidence	Outcome
Policy/Procedure	1.1	Quality Policy	The site must have a documented quality policy which states the site's intention to consistently produce safe and legal products of the specified quality, whilst ensuring that all customer obligations and requirements are met. This must be: ☐ signed by the person with overall responsibility for the site ☐ effectively communicated to all site employees	Pending Review		Pending Review Enter Additional Information... (Optional)

Step 3: When you save progress, the status will change depending on the outcome you have selected.

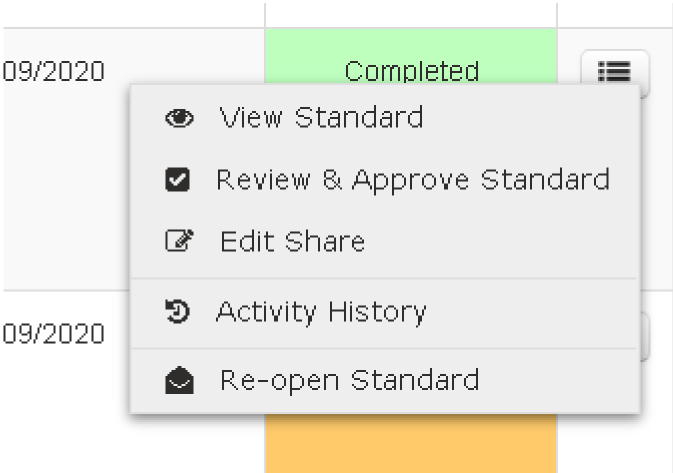






Step 4: When all clauses have been reviewed press the *Submit Review* button to send back to the supplier or *Completed & Approved* if no further action is required.

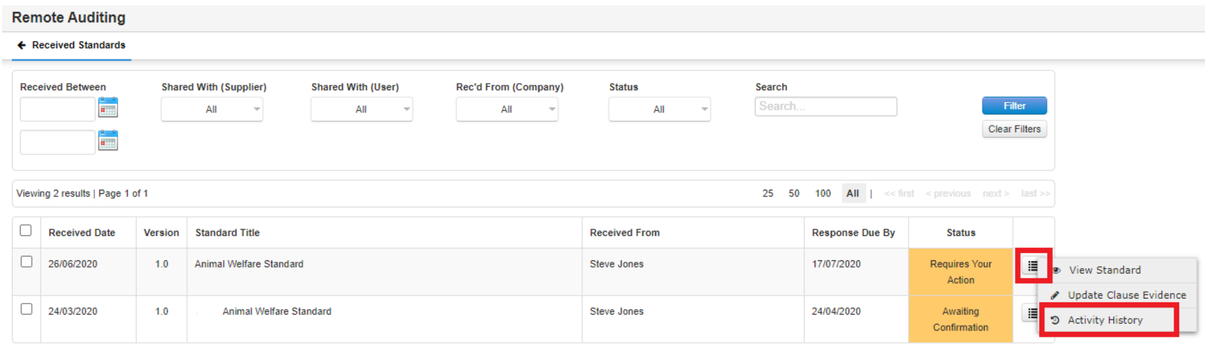
Step 5: If the standard is set to *Completed & Approved* and the standard needs re-opened then press the icon against the selected standard and select *Re-open Standard*.



7. ACCESSING ACTIVITY HISTORY

This will show all the history from when the standard was shared to a supplier to when evidence was uploaded & when clauses are reviewed.

Step 1: Click the icon button against the relevant remote audit standard and select the *Activity History*.

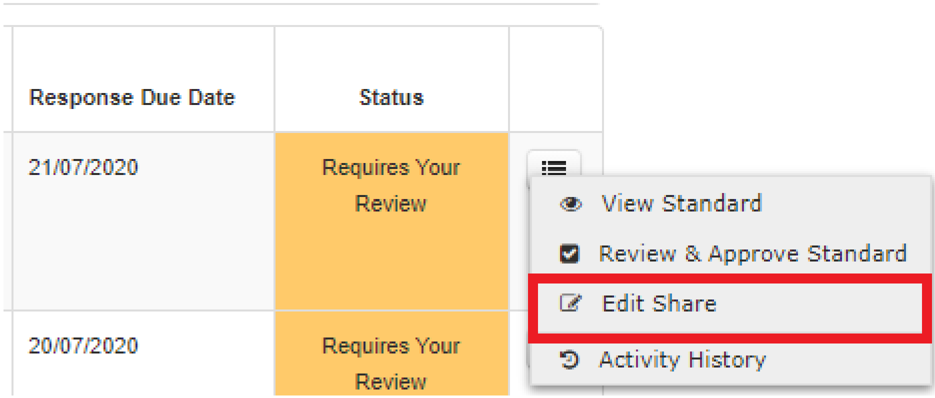


Step 2: You can view the history in here and search by user, dates or by typing in the seach bar.

8. UPDATING STANDARD

This will allow you to edit the response due date and the auditor assigned to the shared standard.

Step 1: Click the icon button against the relevant remote audit standard and select the *Edit Share* option.



Step 2: This will open a modal where you can change the supplier, company user, due date, or auditor.

Step 3: When you have updated the relevant section press *Update*.