

TOOL USER GUIDE

SUPPLIER AUDIT MANAGER



CONTENTS

TOOL USER GUIDE.....	1
1. INITIAL SETUP	5
1.1 TERMINOLOGY	6
1.2 VISIBLE COLUMNS.....	7
1.3 OUTCOMES & SCORING	7
1.3.1 ENABLE OR DISABLE AUDIT OUTCOMES & SCORING SYSTEM.....	8
1.3.2 SET AUDIT OUTCOMES.....	9
1.3.3 ADD NEW SCORE RATING	10
1.4 CUSTOM FIELDS	12
1.4.1 CUSTOM DROPDOWNS.....	13
1.4.2 EDIT OR DELETE OPTIONS IN CUSTOM FIELDS.....	15
1.4.3 CUSTOM FREE TEXT FIELDS.....	19
1.5 AUDIT SCHEDULE DEFAULT SETTINGS	21
1.6 EXPORT TO PDF SETTINGS	22
1.7 INTERNAL REVIEW SETTING	22
1.8 ADDITIONAL SETTINGS.....	23
1.9 SETTING UP AUDIT TYPE APPROVERS	25
1.10 SETTING SUPPLIER PROVIDED AUDITS VISIBLE COLUMNS	26
2. BUILDING A CUSTOM AUDIT	28
2.1 AUDIT TYPES.....	28
2.1.1 ADD LOCATIONS.....	28
2.1.2 EDIT OR DELETE LOCATIONS	31
2.1.3 ADD TYPES.....	31
2.1.4 EDIT OR DELETE TYPES	33
2.1.5 ADD CATEGORIES	33
2.1.6 EDIT OR DELETE CATEGORIES	34
2.1.7 ADD NEW CHECKLIST	34
2.1.8 EDIT CHECKLIST (AND DELETE SECTIONS IN A CHECKLIST)	37
2.1.9 TURN CHECKLIST OFF	37
2.1.10 DELETE A FULL CHECKLIST.....	38
2.1.11 USE/ADD CHECKLIST COMMENTS.....	38
2.1.12 EDIT OR DELETE COMMENTS.....	39
2.1.13 ADD SCORE RATINGS	40
2.1.14 EDIT OR DELETE SCORE RATINGS.....	41

2.1.15	SETTING CORRECTIVE ACTIONS	41
2.1.16	EDIT OR DESELECT OPTIONS IN CORRECTIVE ACTIONS	42
2.1.17	DUPLICATE AN AUDIT.....	43
2.1.18	SENDING AN AUDIT TEMPLATE FOR APPROVAL.....	44
2.1.19	APPROVING AN AUDIT TEMPLATE FOR USE	45
2.2	AUDIT FORM	47
2.3	CHANGING/UPDATING AN AUDIT TEMPLATE	50
3.	USING AND COMPLETING AN AUDIT	52
3.1	COMPLETING ON DESKTOP.....	52
3.1.1	ADDING AN AUDIT ITEM ON ITS OWN.....	57
3.1.2	EDITING AN AUDIT ITEM	57
3.1.3	DELETE AN AUDIT ITEM	58
3.1.4	VIEW AUDIT ITEMS.....	59
3.1.5	DELETE A FULL AUDIT.....	60
3.2	COMPLETING AN AUDIT ON APP	60
3.3	SENDING THE AUDIT TO YOUR SUPPLIERS FOR RESPONSE	84
3.4	SUPPLIER SIDE RESPONDING TO AN AUDIT	86
3.4.1	VIEW AUDIT.....	86
3.4.2	EXPORT TO PDF	89
3.4.3	RESPOND TO THE AUDIT ITEMS & NCS	90
3.4.4	EDIT A RESPONSE	93
3.4.5	DELETE A RESPONSE.....	94
3.4.6	SEND THE RESPONSE.....	95
3.4.7	RESPONDING TO FURTHER DETAIL REQUIRED	96
3.5	SEND REMINDER TO RECIPIENTS	99
3.6	EDIT SHARE VISIBILITY	100
3.7	RESPONDING TO THE SUPPLIERS RESPONSE	101
3.7.1	VIEWING THE RESPONSE.....	101
3.7.2	EXPORT TO PDF	102
3.7.3	RESPOND TO THE AUDIT ITEMS OR NCS.....	103
4.	UPDATE AN AUDIT.....	109
5.	REQUEST AN INTERNAL REVIEW	110
5.1	APPROVE/CONFIRM AN INTERNAL REVIEW	111
6.	MARK AUDIT AS COMPLETE.....	112
7.	NOTIFY TEAM MEMBERS	113
8.	SEND PDF REPORT	115

9.	EXPORT FULL AUDIT TABLE TO PDF	116
10.	EXPORT FULL AUDIT TABLE TO EXCEL.....	116
11.	RECALL AUDIT	116
12.	REOPEN AUDIT	117
13.	MANAGING ACTIVITY SUBSCRIPTIONS.....	118
14.	SUPPLIER PROVIDED AUDITS	120
14.1	VIEW AUDITS IN PROGRESS	120
14.2	FINALISING COMPLETED AUDITS	120

1. INITIAL SETUP

Before you begin to use the tool you need to setup the admin section which are the main setting of the tool.

Step 1: Sign in go to the Supplier Audit Manager

The screenshot shows the 'Supplier Approval' dropdown menu. The 'Supplier Audit Manager' option is highlighted with a red box. The dashboard also displays 'Overall Compliance' charts for 'Ingredients' (88.8%) and 'Packaging' (88.4%), along with a table of compliance status counts.

Compliance Status	Count
Compliant	91
Non-Compliant	55
Requires Action	10

Step 2: Then select *Admin*

The screenshot shows the 'Admin' tab selected in the 'Supplier Audit Manager' section. It displays a filter panel on the left and a table of audit results. The 'Admin' tab is highlighted with a red box.

Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Score	Status
09/09/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Cold Storage		0 - Grade AA (APPROVED)	In Progress

Step 3: The Admin page opens and looks like this below

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Activity Overview Reports **Admin**

Terminology Set up the terminology to apply when creating and viewing your audit items.

Default Setting	Preferred Term
Audit Item Location e.g. Boning Hall/Documentation etc	<input type="text" value="Section"/>
Audit Item Types e.g. Dark Meat/Packaging etc	<input type="text" value="Clause"/>
Audit Item Category e.g. Major/Minor etc	<input type="text" value="Category"/>

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Save Settings

1.1 TERMINOLOGY

Step 1: Set the terminology for parts of the Audit, add a name in the boxes when done select **Save Settings**

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports **Admin**

Terminology Set up the terminology to apply when creating and viewing your audit items.

Default Setting	Preferred Term
Audit Item Location e.g. Boning Hall/Documentation etc	<input type="text" value="Section"/>
Audit Item Types e.g. Dark Meat/Packaging etc	<input type="text" value="Clause"/>
Audit Item Category e.g. Major/Minor etc	<input type="text" value="Category"/>

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

Save Settings

1.2 VISIBLE COLUMNS

These are the details from the audits that you want to see as a summary in the main table list.

Step 1: Select *Visible Columns* on the left

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports Admin

Terminology

Visible Columns

Select which columns you would like displayed in the main List page in addition to the Supplier column below.

Column Name	Display in Table
Audit Date	<input checked="" type="checkbox"/>
Auditor	<input checked="" type="checkbox"/>
Supplier	<input checked="" type="checkbox"/>
Supplier Type	<input checked="" type="checkbox"/>
Supplier Sub Type	<input type="checkbox"/>
Audit Type	<input checked="" type="checkbox"/>
Audit Score	<input checked="" type="checkbox"/>
Status	<input checked="" type="checkbox"/>
Primary Technical Manager	<input checked="" type="checkbox"/>
Factory Code	<input checked="" type="checkbox"/>
Audit Site	<input checked="" type="checkbox"/>
Audit Outcome	<input type="checkbox"/>
Audit Checklist	<input type="checkbox"/>

Save Settings

Step 2: Select the items from the audits that you would like displayed in the main table by ticking and select *Save Settings* when done.

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports Admin

Terminology

Visible Columns

Select which columns you would like displayed in the main List page in addition to the Supplier column below.

Column Name	Display in Table
Audit Date	<input checked="" type="checkbox"/>
Auditor	<input checked="" type="checkbox"/>
Supplier	<input checked="" type="checkbox"/>
Supplier Type	<input checked="" type="checkbox"/>
Supplier Sub Type	<input type="checkbox"/>
Audit Type	<input checked="" type="checkbox"/>
Audit Score	<input checked="" type="checkbox"/>
Status	<input checked="" type="checkbox"/>
Primary Technical Manager	<input checked="" type="checkbox"/>
Factory Code	<input checked="" type="checkbox"/>
Audit Site	<input checked="" type="checkbox"/>
Audit Outcome	<input type="checkbox"/>
Audit Checklist	<input type="checkbox"/>

Save Settings

1.3 OUTCOMES & SCORING

This is where you choose the Outcome and Scoring settings for the audits.

1.3.1 ENABLE OR DISABLE AUDIT OUTCOMES & SCORING SYSTEM

Step 1: Select if you want to use *Audit Outcomes* or Use *Scoring System*.

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports **Admin**

Terminology Enable / Disable Audit Outcomes and Scoring System. Audit Outcomes can be turned off if you are using scoring ratings instead

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

Audit Outcomes Enabled ☐ No

Scoring System Enabled ☒ Yes

Save Settings

Common Outcomes - these will be available in all Audit Types, in addition to their own custom outcomes (if any)

Add New Audit Outcome **Reorder Audit Outcomes**

Audit Outcome	Colour	Points	Order	
Minor	Green	1	1	<input checked="" type="checkbox"/> <input type="checkbox"/>
Major	Amber	5	2	<input checked="" type="checkbox"/> <input type="checkbox"/>
Critical	Red	10	3	<input checked="" type="checkbox"/> <input type="checkbox"/>

Common Score Ratings - these will be available in all Audit Types, in addition to their own custom ratings (if any)

Add New Score Rating

Rating Name	Low Rating	High Rating	Colour	
Grade AA (APPROVED)	0	5		<input checked="" type="checkbox"/> <input type="checkbox"/>
Grade A (APPROVED)	6	10		<input checked="" type="checkbox"/> <input type="checkbox"/>
Grade B (APPROVED)	11	42		<input checked="" type="checkbox"/> <input type="checkbox"/>

Step 2: Here you simply select by tuning one on. Select *Save Settings* when done.

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports **Admin**

Terminology Enable / Disable Audit Outcomes and Scoring System. Audit Outcomes can be turned off if you are using scoring ratings instead

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

Audit Outcomes Enabled ☐ No

Scoring System Enabled ☒ Yes

Save Settings

Common Outcomes - these will be available in all Audit Types, in addition to their own custom outcomes (if any)

Add New Audit Outcome **Reorder Audit Outcomes**

Audit Outcome	Colour	Points	Order	
Minor	Green	1	1	<input checked="" type="checkbox"/> <input type="checkbox"/>
Major	Amber	5	2	<input checked="" type="checkbox"/> <input type="checkbox"/>
Critical	Red	10	3	<input checked="" type="checkbox"/> <input type="checkbox"/>

Common Score Ratings - these will be available in all Audit Types, in addition to their own custom ratings (if any)

Add New Score Rating

Rating Name	Low Rating	High Rating	Colour	
Grade AA (APPROVED)	0	5		<input checked="" type="checkbox"/> <input type="checkbox"/>
Grade A (APPROVED)	6	10		<input checked="" type="checkbox"/> <input type="checkbox"/>
Grade B (APPROVED)	11	42		<input checked="" type="checkbox"/> <input type="checkbox"/>

1.3.2 SET AUDIT OUTCOMES

Step 1: To set your audit outcomes you can do so here as default outcomes for all audits. Select **Add New Audit Outcomes**

Common Outcomes - these will be available in all Audit Types, in addition to their own custom outcomes (if any)

Add New Audit Outcome Reorder Audit Outcomes

Audit Outcome	Colour	Points	Order	
Minor	Green	1	1	 

Step 2: Add the name, points & colour. When done select **Save**.

Add Audit Outcome

Name

Major

Order

2

Points

10

Colour

Amber





Close

Save

Step 3: Your outcomes begin to look like this below. Repeat these steps to add further outcomes.

Common Outcomes - these will be available in all Audit Types, in addition to their own custom outcomes (if any)

Add New Audit Outcome Reorder Audit Outcomes

Audit Outcome	Colour	Points	Order	
Minor	Green	1	1	 
Major	Amber	10	2	 

Step 4: To edit these, select the edit button and change the detail as in the steps above. Or to delete, simply select the delete button.

Common Outcomes - these will be available in all Audit Types, in addition to their own custom outcomes (if any)

+ Add New Audit Outcome

↕ Reorder Audit Outcomes

Audit Outcome	Colour	Points	Order	
Minor	Green	1	1	 
Major	Amber	10	2	 

1.3.3 ADD NEW SCORE RATING

Step 1: Your score rating may look need to look like this below

Common Score Ratings - these will be available in all Audit Types, in addition to their own custom ratings (if any)

+ Add New Score Rating

Rating Name	Low Rating	High Rating	Colour	
Grade AA (APPROVED)	0	5		 
Grade A (APPROVED)	6	10		 
Grade B (APPROVED)	11	42		 
Grade C (UNDER REVIEW)	43	65		 

Step 2: To add a new rating simple select **Add New Score Rating**

Common Score Ratings - these will be available in all Audit Types, in addition to their own custom ratings (if any)

+ Add New Score Rating

Rating Name	Low Rating	High Rating	Colour	
Grade AA (APPROVED)	0	5		 
Grade A (APPROVED)	6	10		 
Grade B (APPROVED)	11	42		 
Grade C (UNDER REVIEW)	43	65		 

Step 3: Add the rating name, the scores and select the colour. Select **Save** when done.

Score Rating

Rating Name

Grade d (Delisted)

Low Rating

66

High Rating

88

Colour









Cancel

Save

Step 4: To edit these, select the edit button and change the detail as in the steps above. Or to delete, simply select the delete button.

Common Score Ratings - these will be available in all Audit Types, in addition to their own custom ratings (if any)

+ Add New Score Rating

Rating Name	Low Rating	High Rating	Colour	
Grade AA (APPROVED)	0	5		 
Grade A (APPROVED)	6	10		 
Grade B (APPROVED)	11	42		 
Grade C (UNDER REVIEW)	43	65		 

1.4 CUSTOM FIELDS

Custom fields are used to bring more customisation & categorisation to your audit process.

Step 1: Sign in, go to the Supplier Audit Manager, go to Admin, then Select **Custom Fields** from the left.

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports **Admin**

Terminology Create custom dropdown fields to categorise an audit and show in the audit table.

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

	Display Name	Active	Display in Table	Display in Emails	Show in Received Table	Mandatory	
Customisable Category 1 Field	Audit Outcome	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Customisable Category 2 Field	Custom 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Customisable Category 3 Field	Group 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

[Save Settings](#)

Custom Free-text fields: Create custom text fields to categorise an audit and show in the audit table.

	Display Name	Active	Display in Table	Display in Emails	Show in Received Table	Mandatory	
Text Field 1	Custom Field - Product Ty	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Text Field 2	Text Field 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Text Field 3	Text Field 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

[Save Settings](#)

1.4.1 CUSTOM DROPDOWNS

Step 1: Give a dropdown a name and set as **Active & Display in Table**, select **Save Settings** when done. If required, custom dropdowns can be made mandatory.

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports **Admin**

Terminology
Create custom dropdown fields to categorise an audit and show in the audit table.

	Display Name	Active	Display in Table	Display in Emails	Show in Received Table	Mandatory	
Customisable Category 1 Field	Audit Outcome	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Customisable Category 2 Field	Custom 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Customisable Category 3 Field	Group 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Custom Free-text fields:
Create custom text fields to categorise an audit and show in the audit table.

	Display Name	Active	Display in Table	Display in Emails	Show in Received Table	Mandatory	
Text Field 1	Custom Field - Product Ty	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Text Field 2	Text Field 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Text Field 3	Text Field 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Save Settings

Step 2: Select Edit categories to add the options in your custom dropdown

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports **Admin**

Terminology
Create custom dropdown fields to categorise an audit and show in the audit table.

	Display Name	Active	Display in Table	Display in Emails	Show in Received Table	Mandatory	
Customisable Category 1 Field	Audit Outcome	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Customisable Category 2 Field	Custom 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Customisable Category 3 Field	Group 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Custom Free-text fields:
Create custom text fields to categorise an audit and show in the audit table.

Save Settings

Step 3: Select **Add new** to add new categories

Custom Category Setup ✕

Below are the current custom categories available for you to use. Please note deleting or editing a category will affect any Audits that are currently linked to that category.

Add New **Delete Selected**

	Category Name	Parents	Colour	Order	Points	
<input type="checkbox"/>	1			1	0	
<input type="checkbox"/>	2			2	1	
<input type="checkbox"/>	3			3	1	

Close Update Categories

Step 4: Add the details & if it is a child of a parent please link them here. Select **Save** when done

Custom Category Setup ✕

Name

Order

Colour

Points

Parents

- ☐ Grade A
- ☐ Grade B
- ☐ Grade C
- ☐ Grade D

Close Save

Step 5: The options now look like this below

Custom Category Setup

Below are the current custom categories available for you to use. Please note deleting or editing a category will affect any Audits that are currently linked to that category.

[Add New](#)
[Delete Selected](#)

	Category Name	Parents	Colour	Order	Points	
<input type="checkbox"/>	1			1	0	
<input type="checkbox"/>	2			2	1	
<input type="checkbox"/>	3			3	1	
<input type="checkbox"/>	4			4	1	

[Close](#)
[Update Categories](#)

1.4.2 EDIT OR DELETE OPTIONS IN CUSTOM FIELDS

Step 1: Sign in, go to the Supplier Audit Manager, go to Admin, then Select **Custom Fields** from the left.

Supplier Audit Manager

[Company Audits](#)
[Audit Items](#)
[Received Customer Audits](#)
[Supplier Provided Audits](#)
[Activity Overview](#)
[Reports](#)
[Admin](#)

Terminology Create custom dropdown fields to categorise an audit and show in the audit table.

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

	Display Name	Active	Display in Table	Display in Emails	Show in Received Table	Mandatory	
Customisable Category 1 Field	Audit Outcome	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Customisable Category 2 Field	Custom 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Customisable Category 3 Field	Group 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Save Settings

Custom Free-text fields: Create custom text fields to categorise an audit and show in the audit table.

	Display Name	Active	Display in Table	Display in Emails	Show in Received Table	Mandatory	
Text Field 1	Custom Field - Product Ty	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Text Field 2	Text Field 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Text Field 3	Text Field 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Save Settings

Step 2: Select Edit Audit Categories

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports **Admin**

Terminology Create custom dropdown fields to categorise an audit and show in the audit table.

	Display Name	Active	Display in Table	Display in Emails	Show in Received Table	Mandatory	
Customisable Category 1 Field	Audit Outcome	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Customisable Category 2 Field	Custom 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Customisable Category 3 Field	Group 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

Custom Free-text fields: Create custom text fields to categorise an audit and show in the audit table.

	Display Name	Active	Display in Table	Display in Emails	Show in Received Table	Mandatory	
Text Field 1	Custom Field - Product Ty	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Text Field 2	Text Field 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Text Field 3	Text Field 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Save Settings

Step 3: Select *Add New* to add further options. Select option by ticking, then select *Delete Selected* to delete.

Custom Category Setup

Below are the current custom categories available for you to use. Please note deleting or editing a category will affect any Audits that are currently linked to that category.

Add New **Delete Selected**

	Category Name	Parents	Colour	Order	Points	
<input checked="" type="checkbox"/>	1			1	0	
<input type="checkbox"/>	2			2	1	
<input type="checkbox"/>	3			3	1	
<input type="checkbox"/>	4			4	1	





Close **Update Categories**

Step 4: And to edit select the edit button beside

Custom Category Setup ×

Below are the current custom categories available for you to use. Please note deleting or editing a category will affect any Audits that are currently linked to that category.

[Add New](#) [Delete Selected](#)

	Category Name	Parents	Colour	Order	Points	
<input checked="" type="checkbox"/>	1			1	0	
<input type="checkbox"/>	2			2	1	
<input type="checkbox"/>	3			3	1	
<input type="checkbox"/>	4			4	1	

[Close](#) [Update Categories](#)

Step 5: Edit details as above per your requirements, select **Save** when done

Custom Category Setup ×

Name

Order

Colour

Points

Parents

- ☐ Grade A
- ☐ Grade B
- ☐ Grade C
- ☐ Grade D

[Close](#) [Save](#)

Step 6: This is what the field looks like in your finished table

Supplier Audit Manager

Company Audits | Audit Items | Received Customer Audits | Activity Overview | Reports | Admin

Date (From)
 Date (To)
 Status
 Audit Score Rating
 Audit Site
 Auditor
 Audit Type
 Custom 2
 Supplier
 Supplier Type
 Lead Technical Manager
 Search
 Supplier Associated Site
 Supplier Sub Type
 Sort
 Filter
 Clear Filters

Add New Audit | Delete Selected | Export...

Viewing 12 results | Page 1 of 1

	Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom 2	Score	Status	
<input type="checkbox"/>	09/09/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Cold Storage		0 - Grade AA (APPROVED)	In Progress	
<input type="checkbox"/>	09/09/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Abattoir & Boning Room Audit		0 - Grade AA (APPROVED)	In Progress	

Step 7: This is what this looks like when you go to do/complete an audit.

Audit Details

Audit Type

Checklists ☐ Abattoir & Boning Room Audit

Auditor

Supplier ☐ Internal Audit

Confidential Share

Audit Date

Attendees

Custom 2

-- Please Select --
 -- Please Select --
 1
 2
 3
 4

Close Save

1.4.3 CUSTOM FREE TEXT FIELDS

Step 1: Give the Custom free text field a name and set as **Active & Display in Table**, select **Save Settings** when done. Fields can also be set as mandatory if required.

Custom Free-text fields:

Create custom text fields to categorise an audit and show in the audit table.

	Display Name	Active	Display in Table	Display in Emails	Show in Received Table	Mandatory
Text Field 1	Custom Field - Product Ty	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Text Field 2	Text Field 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Text Field 3	Text Field 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Settings

Step 2: This then activates then free text field and is used when you first add a new audit.

Step 3: This is what the field looks like in your finished table

Supplier Audit Manager

Company Audits | Audit Items | Received Customer Audits | Activity Overview | Reports | Admin

Date (From) [] Date (To) [] Status: All Auditor: All Audit Type: All Custom 2: All Supplier: All Supplier Type: All Supplier Sub Type: All Supplier Associated Site: All Sort: Audit Created Search: []

Filter Clear Filters

Add New Audit Delete Selected Export...

Viewing 12 results | Page 1 of 1

	Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Custom 2	Score	Status	
<input type="checkbox"/>	09/09/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Cold Storage			0 - Grade AA (APPROVED)	In Progress	
<input type="checkbox"/>	09/09/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Abattoir & Boning Room Audit			0 - Grade AA (APPROVED)	In Progress	

Step 4: This is what this looks like when you go to do/complete an audit.

Audit Details

Checklists

☐ Abattoir & Boning Room Audit

Auditor

Steve Jones

Supplier

☐ Internal Audit

Confidential Share

No

Audit Date

30/09/2020

Attendees

Custom Field - Product Type*

Custom 2

-- Please Select --

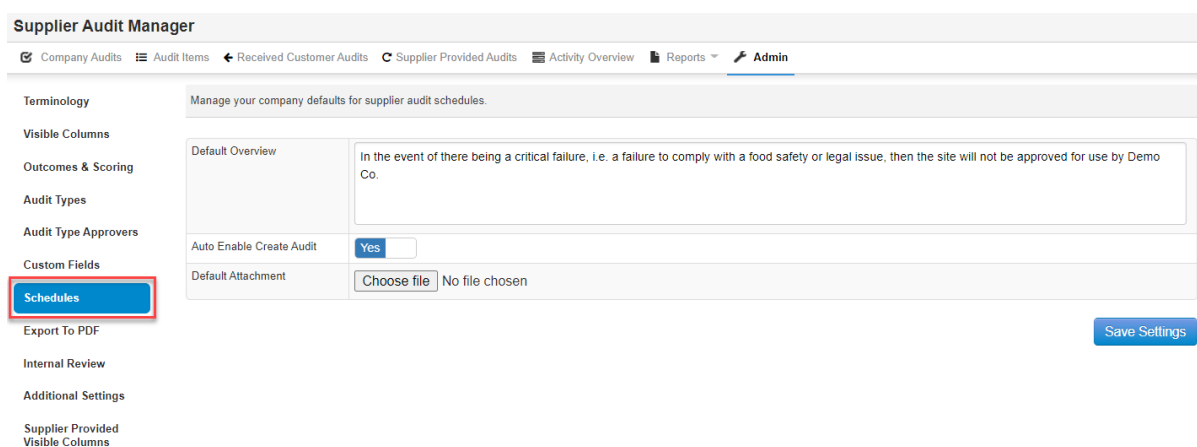
Close

Save

1.5 AUDIT SCHEDULE DEFAULT SETTINGS

This allows you to create a statement for the audit schedule and auto create an audit from a schedule in the calendar.

Step 1: Sign in, go to the Supplier Audit Manager, go to Admin, then Select **Schedules** from the left.



Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports **Admin**

Terminology Manage your company defaults for supplier audit schedules.

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

Default Overview

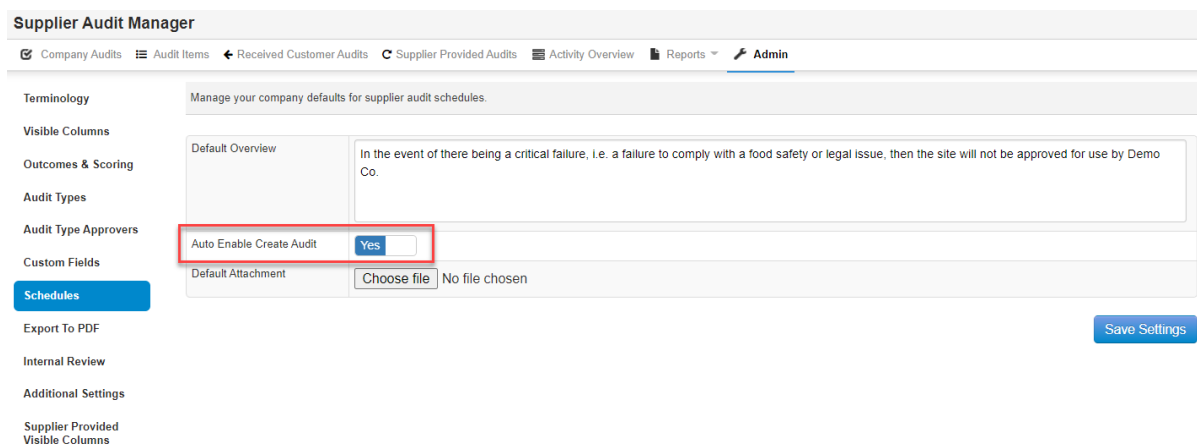
In the event of there being a critical failure, i.e. a failure to comply with a food safety or legal issue, then the site will not be approved for use by Demo Co.

Auto Enable Create Audit **Yes**

Default Attachment Choose file No file chosen

Save Settings

Step 2: Add your statement and select **Auto Enable Create Audit** to 'Yes' or 'No'



Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports **Admin**

Terminology Manage your company defaults for supplier audit schedules.

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

Default Overview

In the event of there being a critical failure, i.e. a failure to comply with a food safety or legal issue, then the site will not be approved for use by Demo Co.

Auto Enable Create Audit **Yes**

Default Attachment Choose file No file chosen

Save Settings

Step 3: When done select **Save**.

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports Admin

Terminology Manage your company defaults for supplier audit schedules.

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

Default Overview In the event of there being a critical failure, i.e. a failure to comply with a food safety or legal issue, then the site will not be approved for use by Demo Co.

Auto Enable Create Audit ☒ Yes

Default Attachment No file chosen

1.6 EXPORT TO PDF SETTINGS

These are default settings for exporting to PDF

1.7 INTERNAL REVIEW SETTING

Allows internal reviews of audits to be requested from a team or user in your company. The reviewer can then mark the internal review status as confirmed.

The internal review status will appear alongside each audit in the Company Audits list.

Step 1: Sign in, go to the Supplier Audit Manager, go to Admin, then Select **Internal Review** from the left.

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports Admin

Terminology Allows internal reviews of audits to be requested from a team or user in your company. The reviewer can then mark the internal review status as confirmed.

Visible Columns The internal review status will appear alongside each audit in the Company Audits list.

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

Internal Review Enabled ☒ Yes

Step 2: Choose to turn it on or off then select **Save Settings** when done

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports Admin

Terminology
Allows internal reviews of audits to be requested from a team or user in your company. The reviewer can then mark the internal review status as confirmed. The internal review status will appear alongside each audit in the Company Audits list.

Visible Columns

Outcomes & Scoring
Internal Review Enabled ☒ Yes ☐ No

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

Save Settings

Step 3: Internal review turned in will look like this now in the main table

Add New Audit Delete Selected Export...

Viewing 12 results | Page 1 of 1

	Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Custom 2	Score	Status	Internal Review Status
<input type="checkbox"/>	09/09/2020	Group	Steve Jones	Acom Produce	EC 343434	Steve Jones	Fruit	Cold Storage			0 - Grade AA (APPROVED)	In Progress	Not Applicable

1.8 ADDITIONAL SETTINGS

Audit Templates can be shared with 3rd parties to conduct Audits on your behalf. Enabling this option will allow you to Finalise audits with a status of Completed in the Supplier Provided Audits tab

Step 1: Sign in, go to the Supplier Audit Manager, go to Admin, then Select **Additional Settings** from the left.

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits **Supplier Provided Audits** Activity Overview Reports Admin

Terminology Audit Templates can be shared with 3rd parties to conduct Audits on your behalf. Enabling this option will allow you to Finalise audits with a status of Completed in the Supplier Provided Audits tab

Visible Columns

Outcomes & Scoring Finalise Step Enabled ☒ Yes

Audit Types Enable Lock On Completion ☐ No

Audit Type Approvers

Custom Fields [Save Settings](#)

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

Step 2: (if required) Use the toggle button to enable the Finalise Step.

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits **Supplier Provided Audits** Activity Overview Reports Admin

Terminology Audit Templates can be shared with 3rd parties to conduct Audits on your behalf. Enabling this option will allow you to Finalise audits with a status of Completed in the Supplier Provided Audits tab

Visible Columns

Outcomes & Scoring Finalise Step Enabled ☒ Yes

Audit Types Enable Lock On Completion ☐ No

Audit Type Approvers

Custom Fields [Save Settings](#)

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

Step 3: (if required) use the toggle button to enable the Lock On Completion function. Note – this function prevents completed audits carried out by third parties from being deleted after completion.

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits **Supplier Provided Audits** Activity Overview Reports Admin

Terminology Audit Templates can be shared with 3rd parties to conduct Audits on your behalf. Enabling this option will allow you to Finalise audits with a status of Completed in the Supplier Provided Audits tab

Visible Columns

Outcomes & Scoring Finalise Step Enabled ☒ Yes

Audit Types Enable Lock On Completion ☐ No

Audit Type Approvers

Custom Fields [Save Settings](#)

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

Step 4: Once settings are as required select the **Save Settings** button

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits **Supplier Provided Audits** Activity Overview Reports Admin

Terminology Audit Templates can be shared with 3rd parties to conduct Audits on your behalf. Enabling this option will allow you to Finalise audits with a status of Completed in the Supplier Provided Audits tab

Visible Columns

Outcomes & Scoring Finalise Step Enabled ☐ Yes

Audit Types Enable Lock On Completion ☐ No

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

Save Settings

1.9 SETTING UP AUDIT TYPE APPROVERS

This function is available to allow an approval step between the creation of an audit template and this template being available for use, to set up the approvers follow the steps below.

Step 1: Sign in, go to the Supplier Audit Manager, go to Admin, then Select **Audit Type Approvers** from the left.

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits **Supplier Provided Audits** Activity Overview Reports **Admin**

Terminology Manage internal audit type approvers for each company site. Audit types must be approved by an approver before audits can be recorded against it.

Visible Columns **Add Approvers**

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

Site	Audit Type	Approval Required By	Audit Type Approvers
Group	Abattoir & Boning Room Audit	One of the selected users	Steve Jones
Group	Standard Audit	All selected users	Steve Jones

Step 2: Select **Add Approvers** button

Step 3: The modal screen is shown below, once the fields are populated select **Save**

The modal screen 'Audit Type Approvers' contains the following fields and options:

- Site:** Demo Co Group (Group) (Dropdown menu)
- Audit Type:** All (Dropdown menu)
- Approval Required By:** All Selected Users (Dropdown menu)
- Users:** Search By Name... (Search bar)
 - Group Users -- (Section header)
 - ☐ Eugene Delacroix
 - ☐ Steve Jones
 - ☐ Eric Knowles
 - ☐ Tina Mead

Callouts from the right side of the image point to the following fields:

- Select the site the audit relates to (points to Site)
- Select either the individual audit or leave as 'All' (points to Audit Type)
- Select either 'All Selected Users' or 'One of the Selected Users' (points to Approval Required By)
- Select the User(s) for the approval (points to the Users list)

Buttons at the bottom: Cancel, Save

The view of this record will show as below

Supplier Audit Manager				
Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports Admin				
Terminology	Manage internal audit type approvers for each company site. Audit types must be approved by an approver before audits can be recorded against it.			
Visible Columns	Add Approvers			
Outcomes & Scoring				
Audit Types				
Audit Type Approvers				
Custom Fields				
Schedules				
Export To PDF				
Internal Review				
Additional Settings				
Supplier Provided Visible Columns				

Site	Audit Type	Approval Required By	Audit Type Approvers	
Group	Abattoir & Boning Room Audit	One of the selected users	Steve Jones	
Group	Standard Audit	All selected users	Steve Jones	

1.10 SETTING SUPPLIER PROVIDED AUDITS VISIBLE COLUMNS

Step 1: Sign in, go to the Supplier Audit Manager, go to Admin, then Select **Supplier Provided Visible Columns**

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports Admin

Terminology

Select which columns you would like displayed in the Supplier Provided Audits Page below.

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided
Visible Columns

Audit Date	<input checked="" type="checkbox"/>
Auditor	<input checked="" type="checkbox"/>
Lead Technical Manager	<input checked="" type="checkbox"/>
Third Party	<input checked="" type="checkbox"/>
Factory Code	<input checked="" type="checkbox"/>
Third Party Type	<input checked="" type="checkbox"/>
Audit Type	<input type="checkbox"/>
Audit Score	<input type="checkbox"/>
Audit Outcome	<input type="checkbox"/>
Audit Checklist	<input type="checkbox"/>
Status	<input checked="" type="checkbox"/>

Save Settings

Step 2: Select the items from the audits that you would like displayed in the Supplier Provided Audits Page by ticking and select **Save Settings** when done.

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports Admin

Terminology

Select which columns you would like displayed in the Supplier Provided Audits Page below.

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided
Visible Columns

Audit Date	<input checked="" type="checkbox"/>
Auditor	<input checked="" type="checkbox"/>
Lead Technical Manager	<input checked="" type="checkbox"/>
Third Party	<input checked="" type="checkbox"/>
Factory Code	<input checked="" type="checkbox"/>
Third Party Type	<input checked="" type="checkbox"/>
Audit Type	<input type="checkbox"/>
Audit Score	<input type="checkbox"/>
Audit Outcome	<input type="checkbox"/>
Audit Checklist	<input type="checkbox"/>
Status	<input checked="" type="checkbox"/>

Save Settings

2. BUILDING A CUSTOM AUDIT

2.1 AUDIT TYPES

2.1.1 ADD LOCATIONS

This is where you build & setup your actual audit now.

Step 1: Select **Audit Types** on the left-hand side. Then select **Add New Type**

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Activity Overview Reports Admin

Terminology You can define specific Audit Types your company carries out, this will then allow you to setup specific Audit Item locations etc. for these types.

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Add New Type **Delete Selected**

<input type="checkbox"/>	Site	Date	Audit Type	Locations	Outcomes	Supplier Type(s)	Scoring Enabled	Version	Status	In Use
<input type="checkbox"/>	Group	06/01/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	1	Approved	Yes
<input type="checkbox"/>	Group	15/11/2018	Cold Storage	No Locations	Minor, Major	Meat , Ingredients, Bakery, Dairy, Vegetables, Salt, Seafood, Fruit	Yes	1	Approved	Yes
<input type="checkbox"/>	Group	29/01/2021	Farm	No Locations	Minor, Major	Farm	Yes	1	Approved	Yes
<input type="checkbox"/>	Group	03/02/2021	Generic Meat Audit	7 Locations	Minor, Major	Meat	Yes	1	Approved	Yes
<input type="checkbox"/>	Group	15/11/2018	Ingredients	No Locations	Minor, Major	Ingredients	Yes	1	Approved	Yes
<input type="checkbox"/>	Group	18/08/2020	Packaging	No Locations	Minor, Major	Packaging	Yes	1	Approved	Yes
<input type="checkbox"/>	Group	06/10/2020	Supplier Audit 1	2 Locations	Minor, Major	Meat , Ingredients, Bakery, Dairy, Packaging, Oil, Vegetables, Salt, Seafood, Fruit, Farm , Services, Agent / Broker, Abattoirs, Distribution centres, Cold stores, Transport, Finished Foods, Internal , Customer , Meat Retail Packer, Meat Processor, Primal Processor	Yes	1	Approved	Yes
<input type="checkbox"/>	Group	06/01/2021	Supplier Visit Audit	No Locations	Minor, Major	All	Yes	1	Approved	Yes

Step 2: Select the details below

Supplier Audit Manager - Create Audit Type ← Back

Audit Type

Site: Demo Co Group (Group) ← Select the site the audit relates to

Audit Type Name: Enter Audit Type Name... ← Name the audit

Latest Version: 1

This Version: 1

In Use: Yes ← Select if the audit is in use or not

Scoring Enabled: Yes ← Select if scoring should be enabled

Attach Document: --Select-- ← (if required) Select from the dropdown option for a reference document (this list is populated from Supplier Document Manager)

Restricted By Supplier Type

- ☐ Meat
- ☐ Ingredients
- ☐ Bakery
- ☐ Dairy
- ☐ Packaging
- ☐ Oil
- ☐ Vegetables
- ☐ Salt
- ☐ Seafood
- ☐ Fruit
- ☐ Farm
- ☐ Services
- ☐ Agent / Broker
- ☐ Abattoirs
- ☐ Distribution centres
- ☐ Cold stores
- ☐ Transport
- ☐ Finished Foods
- ☐ Internal
- ☐ Customer
- ☐ Meat Retail Packer
- ☐ Meat Processor
- ☐ Primal Processor
- ☐ Poultry Farm

← Select the supplier types that this audit can be used against

Cancel Save Details

Step 3: When done select **Save Details**, then **Save & Edit Locations**

Cancel Save Details

Save & Edit Locations

Save & Exit

Step 4: Select **Add New Location**

Supplier Audit Manager - Edit Audit Type ← Back

Audit Type **Locations** **Types** **Categories** **Pre-Defined Items Comments** **Checklists** **Checklist Comments** **Score Ratings** **Corrective Actions**

Audit Item Location e.g. Boning Hall/Documentation etc

← Add New Location

Location	Types	Points	Order
No Location records have been added			

Step 5: The locations are the main areas that you are auditing. So this might be your clauses from a document or areas in a factory. Name the locations and set the points depending on the score settings you are using. Select **Save** when done.

Add Location

Name

factory & site standards

Order

1

Points

0

Types

No Types currently setup

Close

Save

Step 6: Your locations begin to look like this as you build them up

Supplier Audit Manager - Edit Audit Type

Audit Type

Locations

Types

Categories

Pre-Defined Items Comments

Checklists

Checklist Comments





Score Ratings

Corrective Actions

Audit Item Location e.g. Boning Hall/Documentation etc

Add New Location

Reorder Locations

Location	Types	Points	Order	
factory & site standards	----	0	1	 
HACCP	----	0	2	 

2.1.2 EDIT OR DELETE LOCATIONS





Step 1: To edit these location simply select the edit button and change the details as above. And to delete select delete.

Supplier Audit Manager - Edit Audit Type ← Back

[Audit Type](#)
[Locations](#)
[Types](#)
[Categories](#)
[Pre-Defined Items Comments](#)
[Checklists](#)
[Checklist Comments](#)
[Score Ratings](#)
[Corrective Actions](#)

Audit Item Location e.g. Boning Hall/Documentation etc

[Add New Location](#)
[Reorder Locations](#)

Location	Types	Points	Order	
factory & site standards	----	0	1	 
HACCP	----	0	2	 

2.1.3 ADD TYPES

Types are the questions or defined areas within the locations

Step 1: Select Types

Supplier Audit Manager - Edit Audit Type ← Back

[Audit Type](#)
[Locations](#)
[Types](#)
[Categories](#)
[Pre-Defined Items Comments](#)
[Checklists](#)
[Checklist Comments](#)
[Score Ratings](#)
[Corrective Actions](#)

Audit Item Types e.g. Dark Meat/Packaging etc

[Add New Type](#)

Type	Locations	Categories	Points	Order
No Type records have been added				

Step 2: Select *Add New Type*

Supplier Audit Manager - Edit Audit Type ← Back

[Audit Type](#)
[Locations](#)
[Types](#)
[Categories](#)
[Pre-Defined Items Comments](#)
[Checklists](#)
[Checklist Comments](#)
[Score Ratings](#)
[Corrective Actions](#)

Audit Item Types e.g. Dark Meat/Packaging etc

[Add New Type](#)

Type	Locations	Categories	Points	Order
No Type records have been added				

Step 3: Now add the name or question and set the points depending on the score settings you are using. Then link the Type/Question to the location as this is where it is found. Select **Save** when done.

Add Type

Name

CCP Control

Order

1

Points

0

Locations

Search...

☒ factory & site standards
 ☐ HACCP

Categories

No Categories currently setup

Close

Save

Step 4: Your Types begin to look like this as you build them up

Supplier Audit Manager - Edit Audit Type					
<div> <div>Audit Type</div> <div>Locations</div> <div>Types</div> <div>Categories</div> <div>Pre-Defined Items Comments</div> <div>Checklists</div> <div>Checklist Comments</div> <div>Score Ratings</div> <div>Corrective Actions</div> </div>					
<div> <div>Audit Item Types e.g. Dark Meat/Packaging etc</div> <div> <div>Add New Type</div> <div>Reorder Types</div> </div> </div>					
Type	Locations	Categories	Points	Order	
CCP Control	<ul style="list-style-type: none"> factory & site standards 	---	0	1	<div> <div></div> <div></div> </div>

2.1.4 EDIT OR DELETE TYPES



Step 1: To edit these Types, simply select the edit button and change the details as above. And to delete select delete.

Supplier Audit Manager - Edit Audit Type

Audit Type Locations Types Categories Pre-Defined Items Comments Checklists Checklist Comments Score Ratings Corrective Actions

Audit Item Types e.g. Dark Meat/Packaging etc

Add New Type Reorder Types

Type	Locations	Categories	Points	Order	
CCP Control	factory & site standards	---	0	1	 

2.1.5 ADD CATEGORIES

Categories or outcomes could be Minor, major, critical etc.

Step 1: Select Categories and then **Add New Category**

Supplier Audit Manager - Edit Audit Type

Audit Type Locations Types Categories Pre-Defined Items Comments Checklists Checklist Comments Score Ratings Corrective Actions

Audit Item Category e.g. Major/Minor etc

Add New Category

Category	Type	Points	Order
No Category records have been added			

Step 2: Now add the category name, the points if you are using this scoring setup and link the types that this Category/outcome is an option for. So Under CCP control question the outcome from the audit might be Minor. Select **Save** when done

Add Category

Name Minor

Order 1

Points 1

Types Search...

☒ CCP Control

Close Save

Step 3: Repeat these steps to build up the categories or outcomes you might want to use. The categories will begin to look like this below.

Supplier Audit Manager - Edit Audit Type

← Back

[Audit Type](#)
[Locations](#)
[Types](#)
[Categories](#)
[Pre-Defined Items Comments](#)
[Checklists](#)
[Checklist Comments](#)
[Score Ratings](#)
[Corrective Actions](#)

Audit Item Category e.g. Major/Minor etc

[Add New Category](#)

[Reorder Categories](#)

Category	Type	Points	Order	
Minor	• CCP Control	1	1	Edit Delete
Major	• CCP Control	10	2	Edit Delete

2.1.6 EDIT OR DELETE CATEGORIES

Step 1: To edit these Categories, simply select the edit button and change the details as above. And to delete select delete.

Supplier Audit Manager - Edit Audit Type

← Back

[Audit Type](#)
[Locations](#)
[Types](#)
[Categories](#)
[Pre-Defined Items Comments](#)
[Checklists](#)
[Checklist Comments](#)
[Score Ratings](#)
[Corrective Actions](#)

Audit Item Category e.g. Major/Minor etc

[Add New Category](#)

[Reorder Categories](#)

Category	Type	Points	Order	
Minor	• CCP Control	1	1	Edit Delete
Major	• CCP Control	10	2	Edit Delete

2.1.7 ADD NEW CHECKLIST

The audit manager has an option for users to audit by checklist if they so choose. You setup the checklist here.

Step 1: Select Checklists then **Add New Checklist**

Supplier Audit Manager - Edit Audit Type

← Back

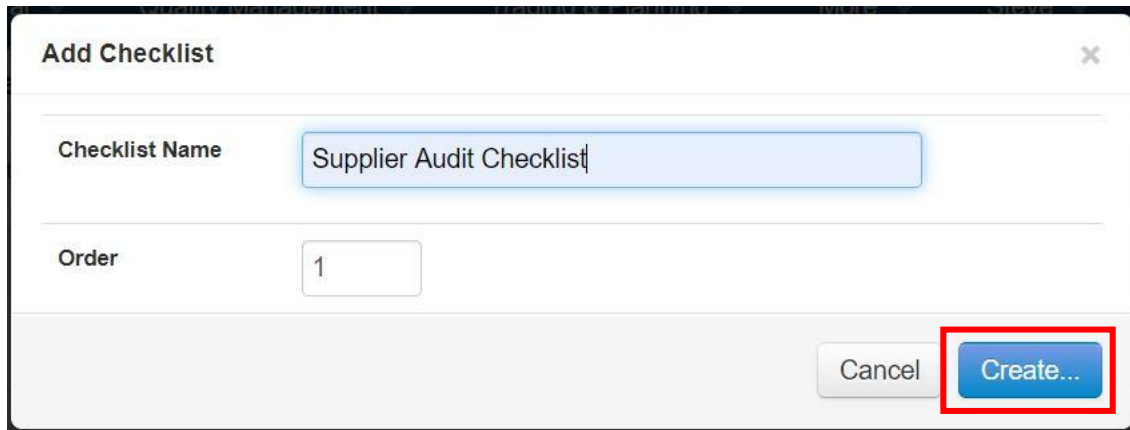
[Audit Type](#)
[Locations](#)
[Types](#)
[Categories](#)
[Pre-Defined Items Comments](#)
[Checklists](#)
[Checklist Comments](#)
[Score Ratings](#)
[Corrective Actions](#)

Manage Audit Checklists

[Add New Checklist](#)

Checklist Name	Sections	In Use	Order	
No checklist records have been added				

Step 2: Give the checklist a name so that it relates to an actual audit. Select **Create** when done



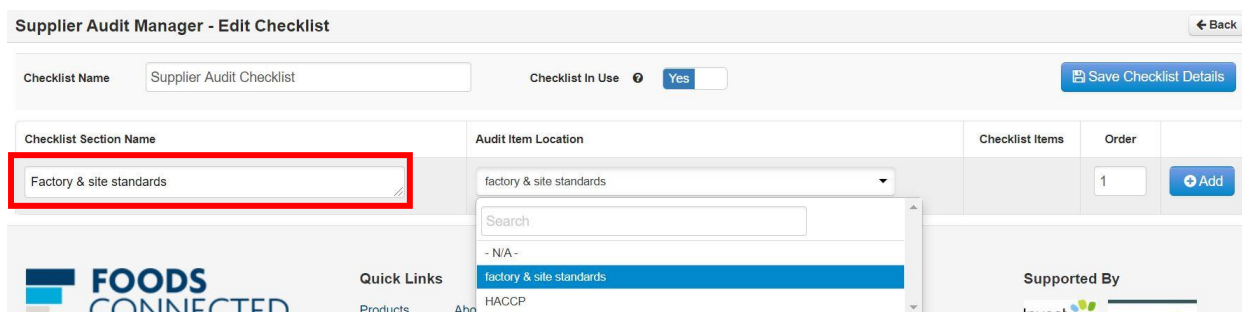
Add Checklist

Checklist Name:

Order:

Cancel **Create...**

Step 3: Now add the name of the checklist that relates to the actual audit location. Then choose that location in the audit from the dropdown.



Supplier Audit Manager - Edit Checklist [← Back](#)

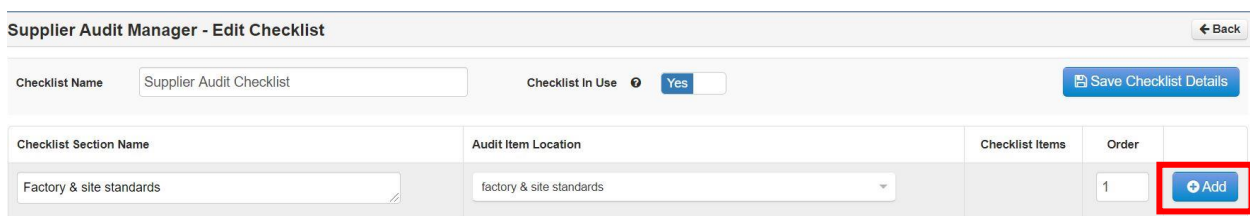
Checklist Name: Checklist In Use: ☒ [Save Checklist Details](#)

Checklist Section Name	Audit Item Location	Checklist Items	Order	
<input type="text" value="Factory & site standards"/>	factory & site standards		1	Add

FOODS CONNECTED Quick Links: Products, About

Supported By: Invest

Step 4: Select **Add** when done.



Supplier Audit Manager - Edit Checklist [← Back](#)

Checklist Name: Checklist In Use: ☒ [Save Checklist Details](#)

Checklist Section Name	Audit Item Location	Checklist Items	Order	
<input type="text" value="Factory & site standards"/>	factory & site standards		1	Add

Step 5: This is how your added sections will look.

Supplier Audit Manager - Edit Checklist ← Back

Checklist Name: Checklist In Use ☐ No Save Checklist Details

↕ Reorder Checklist Sections

Checklist Section Name	Audit Item Location	Checklist Items	Order	
<input type="text" value="Enter Section Name..."/>	<input type="text" value="- N/A -"/>		<input type="text" value="3"/>	+ Add
Factory & site standards	factory & site standards	1	1	✎ ✖
HACCP	HACCP	0	2	✎ ✖

Step 6: When you have added all the sections names select the **Checklist In Use**. And then Select **Save Checklist Details**

Supplier Audit Manager - Edit Checklist ← Back

Checklist Name: Checklist In Use ☒ Yes Save Checklist Details

↕ Reorder Checklist Sections

Checklist Section Name	Audit Item Location	Checklist Items	Order	
<input type="text" value="Enter Section Name..."/>	<input type="text" value="- N/A -"/>		<input type="text" value="3"/>	+ Add
Factory & site standards	factory & site standards	1	1	✎ ✖
HACCP	HACCP	0	2	✎ ✖

Step 7: Your fully completed saved checklist will look like this below in the checklist table

Supplier Audit Manager - Edit Audit Type ← Back

☒ Audit Type
 ☐ Locations
 ☐ Types
 ☐ Categories
 ☐ Pre-Defined Items Comments
 ☒ Checklists
 ☐ Checklist Comments
 ☐ Score Ratings
 ☐ Corrective Actions

Manage Audit Checklists

+ Add New Checklist ↕ Reorder Checklists

Checklist Name	Sections	In Use	Order	
Supplier Audit Checklist	2	Yes	1	✎ ✖

2.1.8 EDIT CHECKLIST (AND DELETE SECTIONS IN A CHECKLIST)



Step 1: To Edit or Delete checklist sections simply select the edit button

Supplier Audit Manager - Edit Audit Type ← Back

[Audit Type](#)
[Locations](#)
[Types](#)
[Categories](#)
[Pre-Defined Items Comments](#)
[Checklists](#)
[Checklist Comments](#)
[Score Ratings](#)
[Corrective Actions](#)

Manage Audit Checklists

[Add New Checklist](#)
[Reorder Checklists](#)





Checklist Name	Sections	In Use	Order	
Supplier Audit Checklist	2	Yes	1	 

Step 2: Then change the details like in the steps above to setup. To delete simply select delete.

Supplier Audit Manager - Edit Checklist ← Back

Checklist Name:
 Checklist In Use: ☒ Yes Save Checklist Details

[Reorder Checklist Sections](#)

Checklist Section Name	Audit Item Location	Checklist Items	Order	
<input type="text" value="Enter Section Name..."/>	<input type="text" value="- N/A -"/>		3	Add
Factory & site standards	factory & site standards	1	1	 
HACCP	HACCP	0	2	 





2.1.9 TURN CHECKLIST OFF

Step 1: If you do not want to use a checklist for your audit and a checklist has been setup and in use simply select the checklist as Not in use by selecting it off.

Supplier Audit Manager - Edit Checklist ← Back

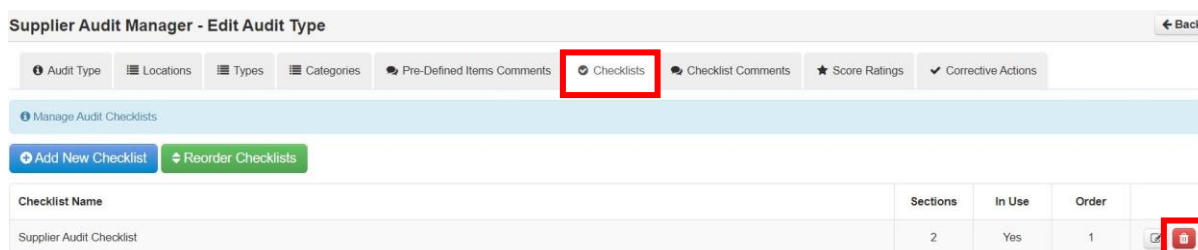
Checklist Name:
 Checklist In Use: ☐ No Save Checklist Details

[Reorder Checklist Sections](#)

Checklist Section Name	Audit Item Location	Checklist Items	Order	
<input type="text" value="Enter Section Name..."/>	<input type="text" value="- N/A -"/>		3	Add
Factory & site standards	factory & site standards	1	1	 
HACCP	HACCP	0	2	 

2.1.10 DELETE A FULL CHECKLIST

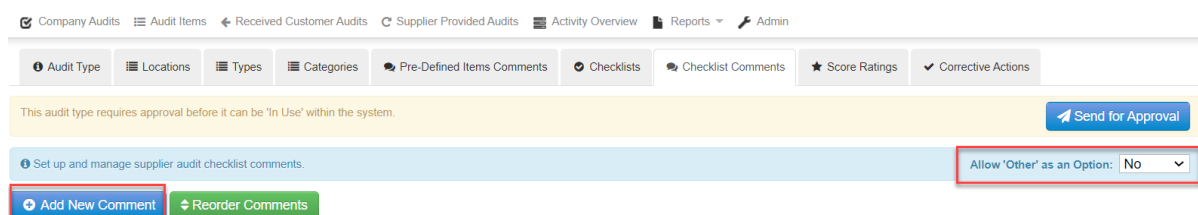
Step 1: To delete a full checklist, in the admin section under audit types scroll to Checklists, then select **Delete**



2.1.11 USE/ADD CHECKLIST COMMENTS

Checklist comments are used to state if a checklist point is compliant/non-compliant.

Step 1: Select Checklist Comments then **Add New Comment**



N.B 'Other' can be set as a checklist option by setting the dropdown on the right to Yes / No.

Step 2: Add the comment which will be something like Compliant/Non-Compliant. Then choose if you want that comment to automatically create an audit item/NC. If you do then select what category of NC it might create as in Minor, Major or critical, whatever categories you have setup. Select yes/no if you want that comment to open up a comment box so you can input a note to that checklist. Lastly, select whether you would like this comment to open a corrective action additional info box which will allow you to input immediate corrective action, as well as sustainable corrective action & monitoring. Once done select **Save**

Checklist Comment

Comment

Non-Compliant

Order

7

Creates Audit Item?

Yes

Audit Item Category

Minor

Open Comment Box?

Yes

Open Corrective Action
Additional Info Box?

Yes

Cancel

Save







Step 3: Your comments will look like this in your table. Simply repeat the steps above to add more comment options.

Audit Type
Locations
Types
Categories
Pre-Defined Items Comments
Checklists
Checklist Comments
Score Ratings
Corrective Actions

This audit type requires approval before it can be 'In Use' within the system.
 Send for Approval

Set up and manage supplier audit checklist comments.
 Allow 'Other' as an Option: No

Add New Comment
Reorder Comments

Comment	Creates Audit Item	Audit Item Category	Opens Comment Box	Opens Corrective Action Additional Info Box	Order	
Compliant	No	---	Yes	No	1	 
Critical	Yes	Critical	Yes	Yes	2	 
Major	Yes	Major	Yes	Yes	3	 

2.1.12EDIT OR DELETE COMMENTS

Step 1: To edit a comment simply select the edit button then follow the steps above the change. To Delete simply select delete.

Audit Type
Locations
Types
Categories
Pre-Defined Items Comments
Checklists
Checklist Comments
Score Ratings
Corrective Actions

This audit type requires approval before it can be 'In Use' within the system.
 Send for Approval

Set up and manage supplier audit checklist comments.
 Allow 'Other' as an Option: No

Add New Comment
Reorder Comments

Comment	Creates Audit Item	Audit Item Category	Opens Comment Box	Opens Corrective Action Additional Info Box	Order	
Compliant	No	---	Yes	No	1	<div> <div></div> <div></div> </div>
Critical	Yes	Critical	Yes	Yes	2	<div> <div></div> <div></div> </div>
Major	Yes	Major	Yes	Yes	3	<div> <div></div> <div></div> </div>

2.1.13 ADD SCORE RATINGS

Score ratings is the system you use to rate an audit from the points you set against each category if you do not want to use the default setting in the Admin section. A score rating might be, Red, Amber, Green or Pass, Fail.

Step 1: Select *Score Ratings* then *Add New Score Rating*

Supplier Audit Manager - Edit Audit Type

← Back

Audit Type Locations Types Categories Pre-Defined Items Comments Checklists Checklist Comments **Score Ratings** Corrective Actions

Manage company audit scoring ratings.

Add New Score Rating

Rating Name	Low Rating	High Rating	Colour
No score ratings have been added			

Step 2: Add the name of the rating then the low point to the high points that that rating is measured between. Then select the colour. Select **Save** when done.

Score Rating

Rating Name: Green

Low Rating: 0

High Rating: 10

Colour:

Cancel Save

Step 3: This is what your score ratings will look like in your table when you are done. Repeat these steps to add more.

Supplier Audit Manager - Edit Audit Type

← Back

Audit Type Locations Types Categories Pre-Defined Items Comments Checklists Checklist Comments **Score Ratings** Corrective Actions

Manage company audit scoring ratings.

Add New Score Rating

Rating Name	Low Rating	High Rating	Colour
Green	0	10	
Amber	11	35	

2.1.14 EDIT OR DELETE SCORE RATINGS







Step 1: To edit a Score Rating simply select the edit button then follow the steps above the change. To Delete simply select delete.

Supplier Audit Manager - Edit Audit Type ← Back

[Audit Type](#)
[Locations](#)
[Types](#)
[Categories](#)
[Pre-Defined Items Comments](#)
[Checklists](#)
[Checklist Comments](#)
[★ Score Ratings](#)
[✓ Corrective Actions](#)

Manage company audit scoring ratings.

[+ Add New Score Rating](#)

Rating Name	Low Rating	High Rating	Colour	
Green	0	10		 
Amber	11	35		 

2.1.15 SETTING CORRECTIVE ACTIONS

Corrective actions are the options you choose that the supplier will answer in a Non-conformance form. You can pick and choose what options.

Step 1: Select **Corrective Actions**, then choose your options

Supplier Audit Manager - Edit Audit Type ← Back

[Audit Type](#)
[Locations](#)
[Types](#)
[Categories](#)
[Pre-Defined Items Comments](#)
[Checklists](#)
[Checklist Comments](#)
[★ Score Ratings](#)
[✓ Corrective Actions](#)

Manage required fields for the supplier audits corrective action response templates for this audit type.

Fields	Description	Required
Corrective Action	Action taken to prevent reoccurrence	<input checked="" type="checkbox"/>
Immediate Correction	The immediate fix (this may include action taken at the time of the audit)	<input checked="" type="checkbox"/>
Root Cause	Non-Conformities will require further investigation to understand what went wrong and why it went wrong. Consideration should also be given to assessing whether it was an isolated incident or if there are wider implications	<input checked="" type="checkbox"/>
Preventative Action	Actions taken or procedures put in place to prevent the issue reoccurring, this is especially important as the Standard requires non-conformities to be closed and makes provision for raising further non-conformities in the following audit against management commitment if this is not done and demonstrable	<input checked="" type="checkbox"/>
Control Measure	The checks put in place to ensure that the Preventative Action has solved the problem identified	<input type="checkbox"/>

[Save Actions](#)

Step 2: When done select **Save Actions**

Supplier Audit Manager - Edit Audit Type ← Back

[Audit Type](#)
[Locations](#)
[Types](#)
[Categories](#)
[Pre-Defined Items Comments](#)
[Checklists](#)
[Checklist Comments](#)
[★ Score Ratings](#)
[✓ Corrective Actions](#)

Manage required fields for the supplier audits corrective action response templates for this audit type.

Fields	Description	Required
Corrective Action	Action taken to prevent reoccurrence	<input checked="" type="checkbox"/>
Immediate Correction	The immediate fix (this may include action taken at the time of the audit)	<input checked="" type="checkbox"/>
Root Cause	Non-Conformities will require further investigation to understand what went wrong and why it went wrong. Consideration should also be given to assessing whether it was an isolated incident or if there are wider implications	<input checked="" type="checkbox"/>
Preventative Action	Actions taken or procedures put in place to prevent the issue reoccurring, this is especially important as the Standard requires non-conformities to be closed and makes provision for raising further non-conformities in the following audit against management commitment if this is not done and demonstrable	<input checked="" type="checkbox"/>
Control Measure	The checks put in place to ensure that the Preventative Action has solved the problem identified	<input type="checkbox"/>

[Save Actions](#)

2.1.16 EDIT OR DESELECT OPTIONS IN CORRECTIVE ACTIONS

Step 1: Select *Corrective Actions*, then choose your options

Supplier Audit Manager - Edit Audit Type ← Back

[Audit Type](#)
[Locations](#)
[Types](#)
[Categories](#)
[Pre-Defined Items Comments](#)
[Checklists](#)
[Checklist Comments](#)
[Score Ratings](#)
[✓ Corrective Actions](#)

Manage required fields for the supplier audits corrective action response templates for this audit type.

Fields	Description	Required
Corrective Action	Action taken to prevent reoccurrence	<input checked="" type="checkbox"/>
Immediate Correction	The immediate fix (this may include action taken at the time of the audit)	<input checked="" type="checkbox"/>
Root Cause	Non-Conformities will require further investigation to understand what went wrong and why it went wrong. Consideration should also be given to assessing whether it was an isolated incident or if there are wider implications	<input checked="" type="checkbox"/>
Preventative Action	Actions taken or procedures put in place to prevent the issue reoccurring, this is especially important as the Standard requires non-conformities to be closed and makes provision for raising further non-conformities in the following audit against management commitment if this is not done and demonstrable	<input checked="" type="checkbox"/>
Control Measure	The checks put in place to ensure that the Preventative Action has solved the problem identified	<input type="checkbox"/>

[Save Actions](#)

Step 2: When done select *Save Actions*

Supplier Audit Manager - Edit Audit Type ← Back

[Audit Type](#)
[Locations](#)
[Types](#)
[Categories](#)
[Pre-Defined Items Comments](#)
[Checklists](#)
[Checklist Comments](#)
[Score Ratings](#)
[✓ Corrective Actions](#)

Manage required fields for the supplier audits corrective action response templates for this audit type.

Fields	Description	Required
Corrective Action	Action taken to prevent reoccurrence	<input checked="" type="checkbox"/>
Immediate Correction	The immediate fix (this may include action taken at the time of the audit)	<input checked="" type="checkbox"/>
Root Cause	Non-Conformities will require further investigation to understand what went wrong and why it went wrong. Consideration should also be given to assessing whether it was an isolated incident or if there are wider implications	<input checked="" type="checkbox"/>
Preventative Action	Actions taken or procedures put in place to prevent the issue reoccurring, this is especially important as the Standard requires non-conformities to be closed and makes provision for raising further non-conformities in the following audit against management commitment if this is not done and demonstrable	<input checked="" type="checkbox"/>
Control Measure	The checks put in place to ensure that the Preventative Action has solved the problem identified	<input type="checkbox"/>

[Save Actions](#)

2.1.17 DUPLICATE AN AUDIT

If you need to build a new audit from scratch and it is very similar to another one, you can duplicate it and use it as the basis.

Step 1: Sign in, go to the **Supplier Audit Manager**, then select **Admin** then **Audit Types** on the left

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Activity Overview Reports **Admin**

Terminology
You can define specific Audit Types your company carries out, this will then allow you to setup specific Audit Item locations etc. for these types.

Visible Columns
Add New Type Delete Selected

Outcomes & Scoring
Audit Types
Audit Type Approvers
Custom Fields
Schedules
Export To PDF
Internal Review
Additional Settings

	Site	Date	Audit Type	Locations	Outcomes	Supplier Type(s)	Scoring Enabled	Version	Status	In Use	
<input type="checkbox"/>	Group	06/01/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	1	Approved	Yes	
<input type="checkbox"/>	Group	15/11/2018	Cold Storage	No Locations	Minor, Major	Meat , Ingredients, Bakery, Dairy, Vegetables, Salt, Seafood, Fruit	Yes	1	Approved	Yes	
<input type="checkbox"/>	Group	29/01/2021	Farm	No Locations	Minor, Major	Farm	Yes	1	Approved	Yes	
<input type="checkbox"/>	Group	03/02/2021	Generic Meat Audit	7 Locations	Minor, Major	Meat	Yes	1	Approved	Yes	
<input type="checkbox"/>	Group	15/11/2018	Ingredients	No Locations	Minor, Major	Ingredients	Yes	1	Approved	Yes	
<input type="checkbox"/>	Group	18/08/2020	Packaging	No Locations	Minor, Major	Packaging	Yes	1	Approved	Yes	
<input type="checkbox"/>	Group	06/10/2020	Supplier Audit 1	2 Locations	Minor, Major	Meat , Ingredients, Bakery, Dairy, Packaging, Oil, Vegetables, Salt, Seafood, Fruit, Farm , Services, Agent / Broker, Abattoirs, Distribution centres, Cold stores, Transport, Finished Foods, Internal , Customer , Meat Retail Packer, Meat Processor, Primal Processor	Yes	1	Approved	Yes	
<input type="checkbox"/>	Group	06/01/2021	Supplier Visit Audit	No Locations	Minor, Major	All	Yes	1	Approved	Yes	

Step 2: Select the menu button beside the audit you want to duplicate, then select **Duplicate Audit Type** from this list

Visible Columns
Add New Type Delete Selected

Outcomes & Scoring
Audit Types
Audit Type Approvers
Custom Fields
Schedules
Export To PDF
Internal Review

	Site	Date	Audit Type	Locations	Outcomes	Supplier Type(s)	Scoring Enabled	Version	Status	In Use	
<input type="checkbox"/>	Group	06/01/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	1	Approved	Yes	
<input type="checkbox"/>	Group	15/11/2018	Cold Storage	No Locations	Minor, Major	Meat , Ingredients, Bakery, Dairy, Vegetables, Salt, Seafood, Fruit	Yes	1	Approved	Yes	
<input type="checkbox"/>	Group	29/01/2021	Farm	No Locations	Minor, Major	Farm	Yes	1	Approved	Yes	

Update Details
Update Form
Duplicate Audit Type
Update History

Step 3: Your duplicated copy will look like this below

Visible Columns
Add New Type Delete Selected

Outcomes & Scoring
Audit Types
Audit Type Approvers
Custom Fields
Schedules
Export To PDF
Internal Review
Additional Settings

	Site	Date	Audit Type	Locations	Outcomes	Supplier Type(s)	Scoring Enabled	Version	Status	In Use	
<input type="checkbox"/>	Group	06/01/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	1	Approved	Yes	
<input type="checkbox"/>	Group	04/02/2021	Abattoir & Boning Room Audit - Copy	No Locations	Minor, Major	Abattoirs	Yes	1	Approved	Yes	
<input type="checkbox"/>	Group	15/11/2018	Cold Storage	No Locations	Minor, Major	Meat , Ingredients, Bakery, Dairy, Vegetables, Salt, Seafood, Fruit	Yes	1	Approved	Yes	

2.1.18 SENDING AN AUDIT TEMPLATE FOR APPROVAL

Step 1: From the view of *Audit Types* select the menu button beside the audit to be approved. Select **Update Details** option

Supplier Audit Manager

Company Audits | Audit Items | Received Customer Audits | Supplier Provided Audits | Activity Overview | Reports | **Admin**

Terminology
You can define specific Audit Types your company carries out, this will then allow you to setup specific Audit Item locations etc. for these types.

Visible Columns
Add New Type | Delete Selected

Outcomes & Scoring
Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

	Site	Date	Audit Type	Locations	Outcomes	Supplier Type(s)	Scoring Enabled	Version	Status	In Use	
<input type="checkbox"/>	Group	09/02/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	2	In Progress	No	<ul style="list-style-type: none"> Update Details Update Form Duplicate Audit Type Updates History
<input type="checkbox"/>	Group	06/01/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	1	Approved	Yes	
<input type="checkbox"/>	Group	04/02/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	1	Approved	Yes	

Step 2: Select the **Send for Approval** button (note – for ease this button is available on each of the tabs in the editing audit function)

Supplier Audit Manager - Edit Audit Type Back

Audit Type | Locations | Types | Categories | Pre-Defined Items Comments | Checklists | Checklist Comments | Score Ratings | Corrective Actions

This audit type requires approval before it can be 'In Use' within the system. Send for Approval

Site: Demo Group Co (Group)

Audit Type Name: Abattoir & Boning Room Audit

Latest Version: 2

This Version: 2

Scoring Enabled: Yes

Attach Document: Supplier Audit Procedure

Restricted By Supplier Type: ☐ Meat ☐ Ingredients

Step 3: Add any comment to the approver(s) and select the **Send for Approval** button

Audit Type Approval

Comment: Enter comment... (Optional)

Cancel Send for Approval

Notification will be sent to the user(s) that are required to carry out the approval, and the status of the audit will move from *In Progress* to *Pending Approval*

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports Admin

Audit Type successfully sent for Approval

Terminology

You can define specific Audit Types your company carries out, this will then allow you to setup specific Audit Item locations etc. for these types.

Visible Columns

Add New Type Delete Selected

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

<input type="checkbox"/>	Site	Date	Audit Type	Locations	Outcomes	Supplier Type(s)	Scoring Enabled	Version	Status	In Use
<input type="checkbox"/>	Group	09/02/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	2	Pending Approval	No
<input type="checkbox"/>	Group	06/01/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	1	Approved	Yes

2.1.19 APPROVING AN AUDIT TEMPLATE FOR USE

Step 1: From the users task list click on the task stating that an audit requires approval

My Tasks

214 outstanding

An audit type 'Abattoir & Boning Room Audit' requires your approval.

You have been asked to complete workflow step 'NPD Prosciutto - Gate 4.1 - Post Validation of Product (4 weeks)'

You have been asked to complete workflow step 'NPD Prosciutto - Gate 4.2 - Post Validation of Product (8 weeks)'

You have been asked to complete workflow step 'NPD Prosciutto - Gate 0 - Project Brief'

Steve Jones has requested to add Audit Certification Body as a Supplier - Requires Approval

View All Tasks

Or

Step 1: From the view of *Audit Types* (within Admin of Supplier Audit Manager) select the menu button and click on **Update Details**

Supplier Audit Manager

Company Audits | Audit Items | Received Customer Audits | Supplier Provided Audits | Activity Overview | Reports | **Admin**

Terminology You can define specific Audit Types your company carries out, this will then allow you to setup specific Audit Item locations etc. for these types.

Visible Columns Add New Type | Delete Selected

Outcomes & Scoring

Audit Types

	Site	Date	Audit Type	Locations	Outcomes	Supplier Type(s)	Scoring Enabled	Version	Status	In Use	
<input type="checkbox"/>	Group	09/02/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	2	Pending Approval	No	⋮
<input type="checkbox"/>	Group	06/01/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	1	Approved	Yes	
<input type="checkbox"/>	Group	04/02/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	1	Approved	Yes	

Update Details | Update Form | Duplicate Audit Type | Updates History

Step 2: From this view the approver is able to review all of the audit details and can select the **Approve Audit Type** button when satisfied with the changes

Supplier Audit Manager - Edit Audit Type Back

Audit Type | Locations | Types | Categories | Pre-Defined Items Comments | Checklists | Checklist Comments | Score Ratings | Corrective Actions

Once this audit type is fully approved it can be 'In Use' within the system. Approve Audit Type

Site: Demo Group Co (Group)

Audit Type Name: Abattoir & Boning Room Audit

Latest Version: 2

This Version: 2

Scoring Enabled: Yes

Step 3: Add a comment (if required) and select the **Approve** button

Audit Type Approval

Comment: Enter comment... (Optional)

Cancel Approve

The audit will then have the status of *Approved* and will be the version of that template in use when new audits are carried out (and audits started on the previous version of the template will continue without change)

Supplier Audit Manager

Company Audits | Audit Items | Received Customer Audits | Supplier Provided Audits | Activity Overview | Reports | **Admin**

Audit Type successfully Approved.

Terminology You can define specific Audit Types your company carries out, this will then allow you to setup specific Audit Item locations etc. for these types.

Visible Columns Add New Type | Delete Selected

Outcomes & Scoring

Audit Types

	Site	Date	Audit Type	Locations	Outcomes	Supplier Type(s)	Scoring Enabled	Version	Status	In Use	
<input type="checkbox"/>	Group	09/02/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	2	Approved	Yes	⋮

2.2 AUDIT FORM

The Audit form is a customised form that you can use or setup, to add information to your audit.

Step 1: Once the audit is built select the edit button beside the audit and select the **Update Form** option

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

	Site	Date	Audit Type	Locations	Outcomes	Supplier Type(s)	Scoring Enabled	Version	Status	In Use	
<input type="checkbox"/>	Group	06/01/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	1	Approved	Yes	<div> <div></div> <div>Update Details</div> <div>Update Form</div> <div>Duplicate Audit Type</div> <div>Updates History</div> </div>
<input type="checkbox"/>	Group	15/11/2018	Cold Storage	No Locations	Minor, Major	Meat, Ingredients, Bakery, Dairy, Vegetables, Salt, Seafood, Fruit	Yes	1	Approved	Yes	
<input type="checkbox"/>	Group	29/01/2021	Farm	No Locations	Minor, Major	Farm	Yes	1	Approved	Yes	

Step 2: Select **Add New Section**

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾

Supplier Audit Manager - Update Form

← Back

Edit Options

Supplier Audit 1 - Form Preview

You have not added any elements to your form yet. To get started, click 'Add New Section'.

Step 3: Name the section the select **Add Section**

Add New Section

Section Name

Page Break After ☐ No

Expand / Collapse ☐ No

Intro Text (Optional)
Instructions regarding completing section

Quick Add Section Fields

Label	Type	Hide Label	Required
<input type="text"/>	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>

Step 4: The section will look like this below. Now to add the questions/fields or options select the + icon.

Supplier Audit Manager - Update Form ← Back

Supplier Audit 1 - Form Preview

Audit Reason

Edit Options
 Add New Reorder

Quick Add Section Fields

Step 5: Now add the question under **Label** and choose from the **Type** the kind of way to answer the question. Select **Update Section** when done

Update Section - Audit Reason

Quick Add Section Fields

Label	Type	Hide Label	Required
Reason	Standard Dropdown - Single	<input type="checkbox"/>	<input type="checkbox"/>
	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>

Cancel **Update Section**

Step 6: Your section with question will look like this below.

Supplier Audit Manager - Update Form ← Back

Supplier Audit 1 - Form Preview

Audit Reason

Reason --Please Select--

Edit Options
 Add New Reorder

Step 7: As it's a dropdown you chose as the field type, you need to add the options in that dropdown. Select the edit button beside the question

Supplier Audit Manager - Update Form ← Back

Supplier Audit 1 - Form Preview

Edit Options
 + Add New - Reorder -

☒ Audit Reason ⚙️ ↻

☒ Reason --Please Select-- ▾

Step 8: Now add the options and select add each time. Once done select **Update Field**

Update Field ✕

Field Label Reason Show

Section Audit Reason ▾

Field Type Standard Dropdown - Single ▾

Options
 ↑ Onboarding ⚙️ ✕

New Supplier Add

Help Text

Help Image Choose file No file chosen

Required ⓘ ☒ No ☐ Always ☐ Condition Based

Visible ⓘ ☒ Always ☐ Condition Based

Delete Field Cancel Update Field

Step 9: Your options in the form will now look like this below. Repeat the steps above to build up the sections and questions as you need them.

Supplier Audit Manager - Update Form ← Back

Supplier Audit 1 - Form Preview

Edit Options
 + Add New - Reorder -

☒ Audit Reason ⚙️ ↻

☒ Reason

--Please Select--
 --Please Select--
 Onboarding
 New Supplier

Step 10: The form is now active and will appear when you go to audit. If you do not need to use a form do not create anything in it.

2.3 CHANGING/UPDATING AN AUDIT TEMPLATE

When existing audit templates require updates follow the steps below

Step 1: From the Audit Admin page select ***Audit Types*** from the left hand side

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Activity Overview Reports Admin

Terminology Set up the terminology to apply when creating and viewing your audit items.

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Default Setting

Audit Item Location e.g. Boning Hall/Documentation etc

Audit Item Types e.g. Dark Meat/Packaging etc

Audit Item Category e.g. Major/Minor etc

Preferred Term

Section

Clause

Category

Save Settings

Step 2: From the audits select the one that requires amending and from the menu button select the ***Update Details*** option

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits Activity Overview Reports Admin

Terminology You can define specific Audit Types your company carries out, this will then allow you to setup specific Audit Item locations etc. for these types.

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Table:

	Site	Date	Audit Type	Locations	Outcomes	Supplier Type(s)	Scoring Enabled	Version	Status	In Use	
<input type="checkbox"/>	Group	06/01/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	1	Approved	Yes	⋮
<input type="checkbox"/>	Group	04/02/2021	Abattoir & Boning Room Audit - Copy	No Locations	Minor, Major	Abattoirs	Yes	1	Approved	Yes	

Dropdown Menu:

- Update Details
- Update Form
- Duplicate Audit Type
- Updates History

Step 3: Select the *Create New Version* button

Supplier Audit Manager - Edit Audit Type [← Back](#)

[Audit Type](#)
[Locations](#)
[Types](#)
[Categories](#)
[Pre-Defined Items Comments](#)
[Checklists](#)
[Checklist Comments](#)
[Score Ratings](#)
[Corrective Actions](#)

Changes to this audit type require approval, therefore only the enabled fields below are editable. To make further adjustments for new Audits please create a newer version. [Create New Version](#)

Site	Demo Group Co (Group)
Audit Type Name	Abattoir & Boning Room Audit
Latest Version	1
This Version	1
In Use	Yes
Scoring Enabled	Yes
Attach Document	Supplier Audit Procedure
Restricted By Supplier Type	Abattoirs

Step 4: The audit can then be amended as required (as per the steps used to build the audit in the first place), ensure to select to **Save** each change before moving to the next step. The version number will automatically update. If the audit type requires approval this will be shown with the heading and button to *Send for Approval*, if there isn't an approval step required then the updated version can be used straightaway.

Supplier Audit Manager - Edit Audit Type [← Back](#)

[Audit Type](#)
[Locations](#)
[Types](#)
[Categories](#)
[Pre-Defined Items Comments](#)
[Checklists](#)
[Checklist Comments](#)
[Score Ratings](#)
[Corrective Actions](#)

This audit type requires approval before it can be 'In Use' within the system. [Send for Approval](#)

Site	Demo Group Co (Group)
Audit Type Name	Abattoir & Boning Room Audit
Latest Version	2
This Version	2
Scoring Enabled	Yes
Attach Document	Supplier Audit Procedure
Restricted By Supplier Type	<input type="checkbox"/> Meat <input type="checkbox"/> Ingredients

3. USING AND COMPLETING AN AUDIT

3.1 COMPLETING ON DESKTOP

Step 1: Sign in go to the *Supplier Audit Manager*, then select *Add New Audit*

The screenshot shows the 'Supplier Audit Manager' interface. The left sidebar contains a list of tools, with 'Supplier Audit Manager' highlighted in blue. Below the sidebar, there is a table of audit results. The table has columns for Audit Date, Audit Site, Auditor, Supplier, Factory Code, Lead Technical Manager, Supplier Type, Audit Type, Custom Field - Product Type, Custom 2, Score, Status, and Internal Review Status. The first row shows an audit on 09/09/2020 at Group, conducted by Steve Jones for Acorn Produce, with a score of 0 - Grade AA (APPROVED) and a status of In Progress.

Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Custom 2	Score	Status	Internal Review Status
09/09/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Cold Storage			0 - Grade AA (APPROVED)	In Progress	Not Applicable

Step 2: Add details of the audit below. And select **Save** when done

The screenshot shows the 'Audit Details' form with the following fields and annotations:

- Site:** Demo Co Group (Group) [v]. Annotation: Select your site that the audit relates too.
- Audit Type:** Abattoir & Boning Room Audit [v]. Annotation: Select the Audit Type. A red warning message is displayed: "Please note changing the Audit Type of an existing audit, even to a newer version, will result in a loss of data".
- Checklists:** Abattoir & Boning Room Audit [checkbox]. Annotation: Select the checklist if you want to use it. A red warning message is displayed: "Please note changing the Checklists of an existing audit will result in a loss of data".
- Auditor:** Steve Jones [v]. Annotation: Select the supplier from the list.
- Supplier:** Internal Audit [radio], Abattoir 1 [radio]. Annotation: Select the audit date.
- Confidential Share:** No [toggle]. Annotation: Add any attendees for your records.
- Audit Date:** 04/02/2021 [calendar icon].
- Attendees:** [text area]. Annotation: If you have custom fields activated, you can add the info here.
- Custom Field - Product Type*:** [text input].
- Custom 2:** -- Please Select -- [v].
- Buttons:** Close, Save.

Step 3: In the audit overview tab you can attach documents and add comments. Select **Save** when done. If you need to change the audit details, select the **Update Audit Details** and follow the steps as above again.

Supplier Audit Manager - Internal ← Back

[Audit Overview](#) [Audit Data Form](#) [Checklists \(1\)](#) [Audit Items](#) [Document](#) Save

Audit Details Update Audit Details

Site	Group	Audit Type	Test Abattoir & Boning Room Audit
Auditor	Ian Collins	Checklists	Abattoir & Boning Room Audit
Supplier	Internal	Audit Score	0 - Grade AA (APPROVED)
Audit Date	02/11/2022		
Attendees			

File Attachments

[Choose files](#) | No file chosen (20 Files - 200mb Max upload at once)

Other Comments

Cancel Save

Pic above

Step 4: Now select the **Audit Data Form** tab

Supplier Audit Manager ← Back

[Audit Overview](#) [Audit Data Form](#) [Checklists \(1\)](#) [Audit Items](#) Save

Audit Reason

Reason --Please Select--

Save

Step 5: Answer the questions on this page and select **Save**

Supplier Audit Manager ← Back

[Audit Overview](#) [Audit Data Form](#) [Checklists \(1\)](#) [Audit Items](#) Save

Audit Reason

Reason New Supplier

Save

Step 6: Now select the **Checklists** tab

Supplier Audit Manager ← Back

✎ Audit Overview 📄 Audit Data Form **✓ Checklists (1)** ☰ Audit Items Save

Section	Check Details	Checked	Category	Comment
1. Supplier Audit Checklist				
Factory & site standards	CCP Control	<input type="checkbox"/>	- Select -	
HACCP	HACCP	<input type="checkbox"/>	- Select -	

Save

Step 7: Complete the checklist. Depending on your checklist setup it may open a comment box and create an audit item or NC

Supplier Audit Manager ← Back

✎ Audit Overview 📄 Audit Data Form **✓ Checklists (1)** ☰ Audit Items Save

Section	Check Details	Checked	Category	Comment
1. Supplier Audit Checklist				
Factory & site standards	CCP Control	<input checked="" type="checkbox"/>	Compliant	
HACCP	HACCP	<input checked="" type="checkbox"/>	<div> Non-Compliant - Select - Non-Compliant Compliant Other </div>	<div>Enter comment here</div>

Save

Step 8: After you complete the checklist select **Save** when done.

Supplier Audit Manager ← Back

✎ Audit Overview 📄 Audit Data Form **✓ Checklists (1)** ☰ Audit Items Save

Section	Check Details	Checked	Category	Comment
1. Supplier Audit Checklist				
Factory & site standards	CCP Control	<input checked="" type="checkbox"/>	Compliant	
HACCP	HACCP	<input checked="" type="checkbox"/>	<div> Non-Compliant - Select - Non-Compliant Compliant Other </div>	<div>Enter comment here</div>

Save

Step 9: As you can see when you save it has created an audit item automatically. This is because of the way you have setup. You can create an audit item in the next tab and complete the details of that one.

Supplier Audit Manager ← Back

✎ Audit Overview 📄 Audit Data Form **✓ Checklists (1)** **☰ Audit Items (1)** Save

Section	Check Details	Checked	Category	Comment
1. Supplier Audit Checklist				
Factory & site standards	CCP Control	<input checked="" type="checkbox"/>	Compliant	
HACCP	HACCP	<input checked="" type="checkbox"/>	Non-Compliant	<div>Enter comment here</div>

Save

Step 10: Select the **Audit Items** tab

Supplier Audit Manager ← Back

[Audit Overview](#)
[Audit Data Form](#)
[Checklists \(1\)](#)
[Audit Items \(1\)](#)

Audit Items

[+ Add Audit Item](#)
[Mark Selected as...](#)
[Save Audit Items](#)

<input type="checkbox"/>	#	Category	Location	Type	Comments	Status	Responses
<input type="checkbox"/>	1	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	Enter comment here	Requires Response	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>

[Request Additional Info \(All Items\)](#)

Step 11: To add further details to the audit item or edit the details select the edit button

Supplier Audit Manager ← Back

[Audit Overview](#)
[Audit Data Form](#)
[Checklists \(1\)](#)
[Audit Items \(1\)](#)

Audit Items

[+ Add Audit Item](#)
[Mark Selected as...](#)
[Save Audit Items](#)

<input type="checkbox"/>	#	Category	Location	Type	Comments	Status	Responses
<input type="checkbox"/>	1	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	Enter comment here	Requires Response	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>

[Request Additional Info \(All Items\)](#)

Step 12: This is the audit item form, you can change or correct the details here, add comments and add pictures. When done select **Update**

Edit Audit Item

Location: HACCP

Type: HACCP shall have senior management commitment a

Category: Major

Comment: Enter comment here

Attach Image(s):

 No file chosen

 No file chosen

 No file chosen

 No file chosen

 No file chosen

 No file chosen

Step 13: You can change the **Status** here as well from the dropdown. When done select **Save Audit Items**

Supplier Audit Manager ← Back

[Audit Overview](#) [Audit Data Form](#) [Checklists \(1\)](#) [Audit Items \(1\)](#)

Audit Items

[Add Audit Item](#) [Mark Selected as...](#) [Save Audit Items](#)

#	Category	Location	Type	Comments	Status	Responses
1	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	Enter comment here	Requires Response	

[Request Additional Info \(All Items\)](#)

3.1.1 ADDING AN AUDIT ITEM ON ITS OWN

Step 1: If you just want to add an Audit Item without using the checklist simply select **Add Audit Item**

Supplier Audit Manager ← Back

[Audit Overview](#) [Audit Data Form](#) [Checklists \(1\)](#) [Audit Items \(1\)](#)

Audit Items

[Add Audit Item](#) [Mark Selected as...](#) [Save Audit Items](#)

#	Category	Location	Type	Comments	Status	Responses
1	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	Enter comment here	Requires Response	

[Request Additional Info \(All Items\)](#)

3.1.2 EDITING AN AUDIT ITEM

Step 1: In the supplier audit manager Select the **Audit Items** tab

Supplier Audit Manager ← Back

[Audit Overview](#) [Audit Data Form](#) [Checklists \(1\)](#) [Audit Items \(1\)](#)

Audit Items

[Add Audit Item](#) [Mark Selected as...](#) [Save Audit Items](#)

#	Category	Location	Type	Comments	Status	Responses
1	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	Enter comment here	Requires Response	

[Request Additional Info \(All Items\)](#)

Step 2: To edit the details select the edit button

Supplier Audit Manager ← Back

[Audit Overview](#) [Audit Data Form](#) [Checklists \(1\)](#) [Audit Items \(1\)](#)

Audit Items

[Add Audit Item](#) [Mark Selected as...](#) [Save Audit Items](#)

<input type="checkbox"/>	#	Category	Location	Type	Comments	Status	Responses	
<input type="checkbox"/>	1	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	Enter comment here	Requires Response		<div>✖</div> <div>Edit Audit Item</div>

[Download Additional Items \(100 items\)](#)

Step 3: This is the audit item form, you can change or correct the details here, add comments and add pictures. When done select **Update**

Edit Audit Item

Location: HACCP

Type: HACCP shall have senior management commitment a

Category: Major

Comment: Enter comment here

Attach Image(s):

Choose file No file chosen

Choose file No file chosen

Choose file No file chosen

Choose file No file chosen

Choose file No file chosen

Choose file No file chosen

Choose file No file chosen

Cancel Delete **Update**

3.1.3 DELETE AN AUDIT ITEM

Step 1: In the supplier audit manager Select the **Audit Items** tab

Supplier Audit Manager ← Back

[Audit Overview](#)
[Audit Data Form](#)
[Checklists \(1\)](#)
[Audit Items \(1\)](#)

Audit Items

[Add Audit Item](#)
[Mark Selected as...](#)
[Save Audit Items](#)

<input type="checkbox"/>	#	Category	Location	Type	Comments	Status	Responses
<input type="checkbox"/>	1	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	Enter comment here	Requires Response	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>

[Request Additional Info \(All Items\)](#)

Step 2: To edit the details select the edit button

Supplier Audit Manager ← Back

[Audit Overview](#)
[Audit Data Form](#)
[Checklists \(1\)](#)
[Audit Items \(1\)](#)

Audit Items

[Add Audit Item](#)
[Mark Selected as...](#)
[Save Audit Items](#)

<input type="checkbox"/>	#	Category	Location	Type	Comments	Status	Responses
<input type="checkbox"/>	1	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	Enter comment here	Requires Response	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>

[Request Additional Info \(All Items\)](#)

Step 3: This is the audit item form, select **Delete**

Edit Audit Item

Location: HACCP

Type: HACCP shall have senior management commitment a

Category: Major

Comment: Enter comment here

Attach Image(s):

[Choose file](#) No file chosen
[Choose file](#) No file chosen
[Choose file](#) No file chosen
[Choose file](#) No file chosen
[Choose file](#) No file chosen
[Choose file](#) No file chosen

[Cancel](#)
[Delete](#)
[Update](#)

3.1.4 VIEW AUDIT ITEMS

To view all your audit items in any status from all your audits

Step 1: Select **Audit items** and view all from here selecting each one to view responses.

Supplier Audit Manager

Company Audits **Audit Items** ← Received Customer Audits Activity Overview Reports Admin

Audit Date (From) Required By Date (From) Audit Site Auditor Supplier Lead Technical Manager Audit Status Filter
 Audit Date (To) Required By Date (To) Category Location Type Item Status Supplier Type Clear Filters

▼ Mark Selected as Complete Viewing 10 results | Page 1 of 1

<input type="checkbox"/>	Audit Date	Auditor	Supplier	Audit Status	Audit Item Category	Audit Item Location	Audit Item Type	Response Required By Date	Proposed Completion Date	Audit Item Status	
<input type="checkbox"/>	18/08/2020	Steve Jones	Veg Supplier (EC 161616)	Requires Response (Overdue)	---	---	---	04/06/2020 17:00:00	---	Requires Response	Q
<input type="checkbox"/>	01/10/2020	Steve Jones	Acorn Produce (EC 343434)	Requires Response	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	---	---	Requires Response	Q
<input type="checkbox"/>	31/03/2020	Steve Jones	Meat Supplier (EC 343434)	Completed	Major	Buildings, External Areas, Process, Layout, and Equipment	External and internal areas shall be maintained in good order to minimize the risk of pests.	04/02/2019 17:00:00	28/01/2019 00:00:00	Completed	Q

Select Language

3.1.5 DELETE A FULL AUDIT

Step 1: Select the audit you want to delete then select **Delete Selected**

Supplier Audit Manager

Company Audits **Audit Items** ← Received Customer Audits Activity Overview Reports Admin

Date (From) Audit Site Supplier Supplier Associated Site
 Date (To) Auditor Supplier Type Supplier Sub Type
 Status All Audit Type Lead Technical Manager Sort
 Audit Score Rating All Custom 2 Internal Review Status Search
 Search...

Add New Audit **Delete Selected** Export...

Viewing 13 results | Page 1 of 1

<input type="checkbox"/>	Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Custom 2	Score	Status	Internal Review Status	
<input checked="" type="checkbox"/>	01/10/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Supplier Audit 1	Corn		0 - Grade AA (APPROVED)	In Progress	Not Applicable	
<input type="checkbox"/>	09/09/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Cold Storage			0 - Grade AA (APPROVED)	In Progress	Not Applicable	

Step 2: The full audit is now deleted.

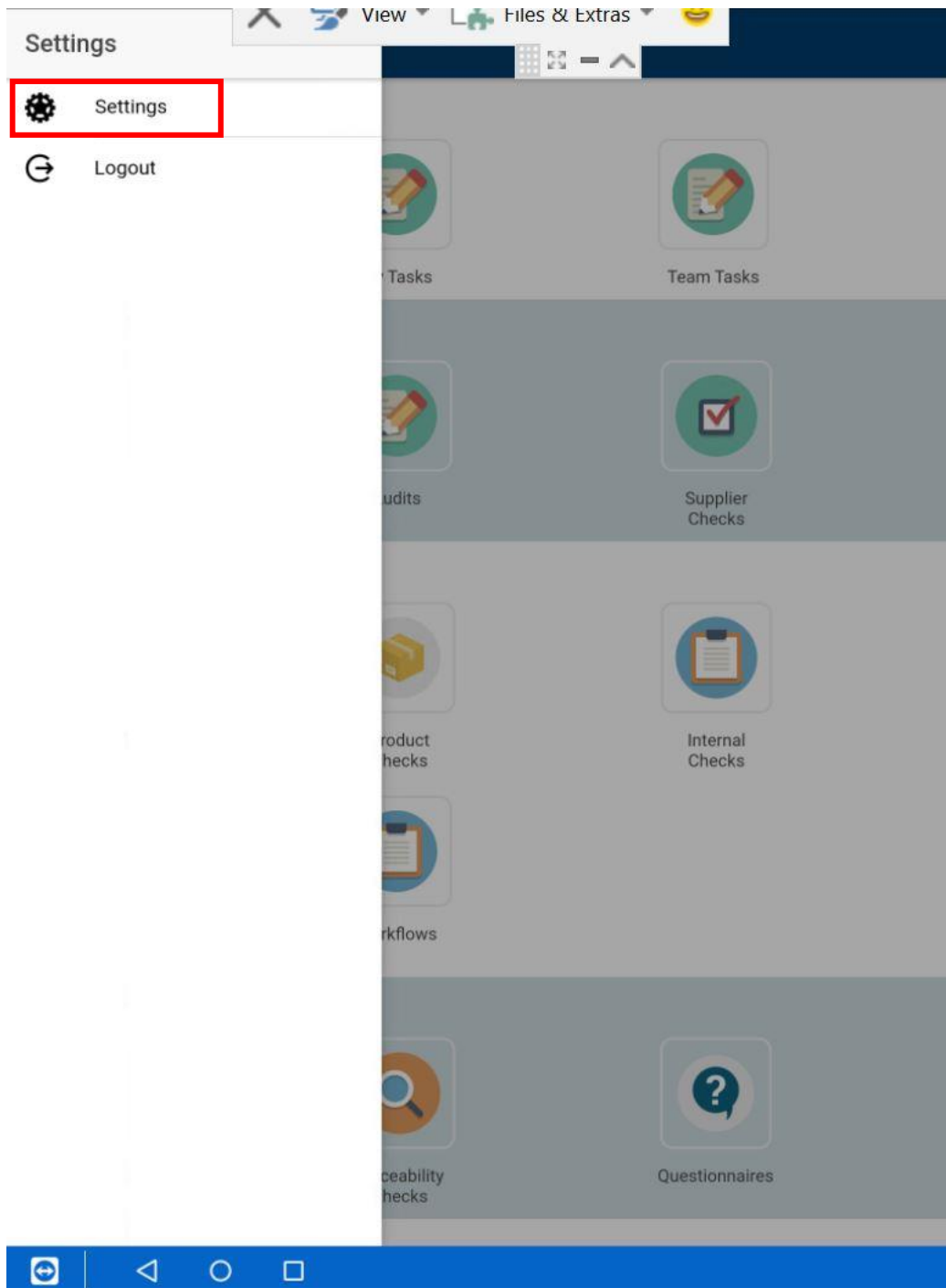
3.2 COMPLETING AN AUDIT ON APP

Step 1: When signed in go to the app select the lines icon

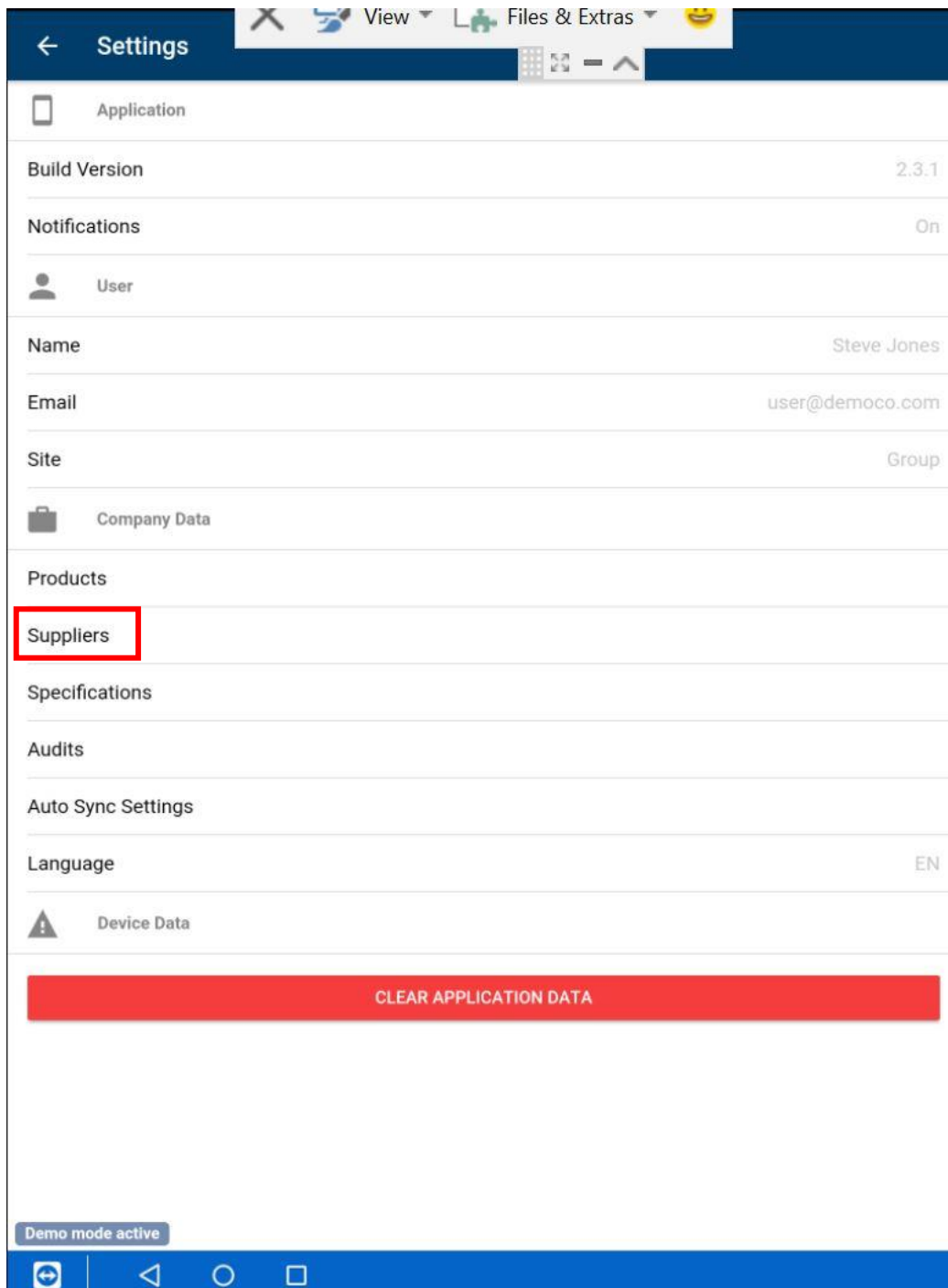




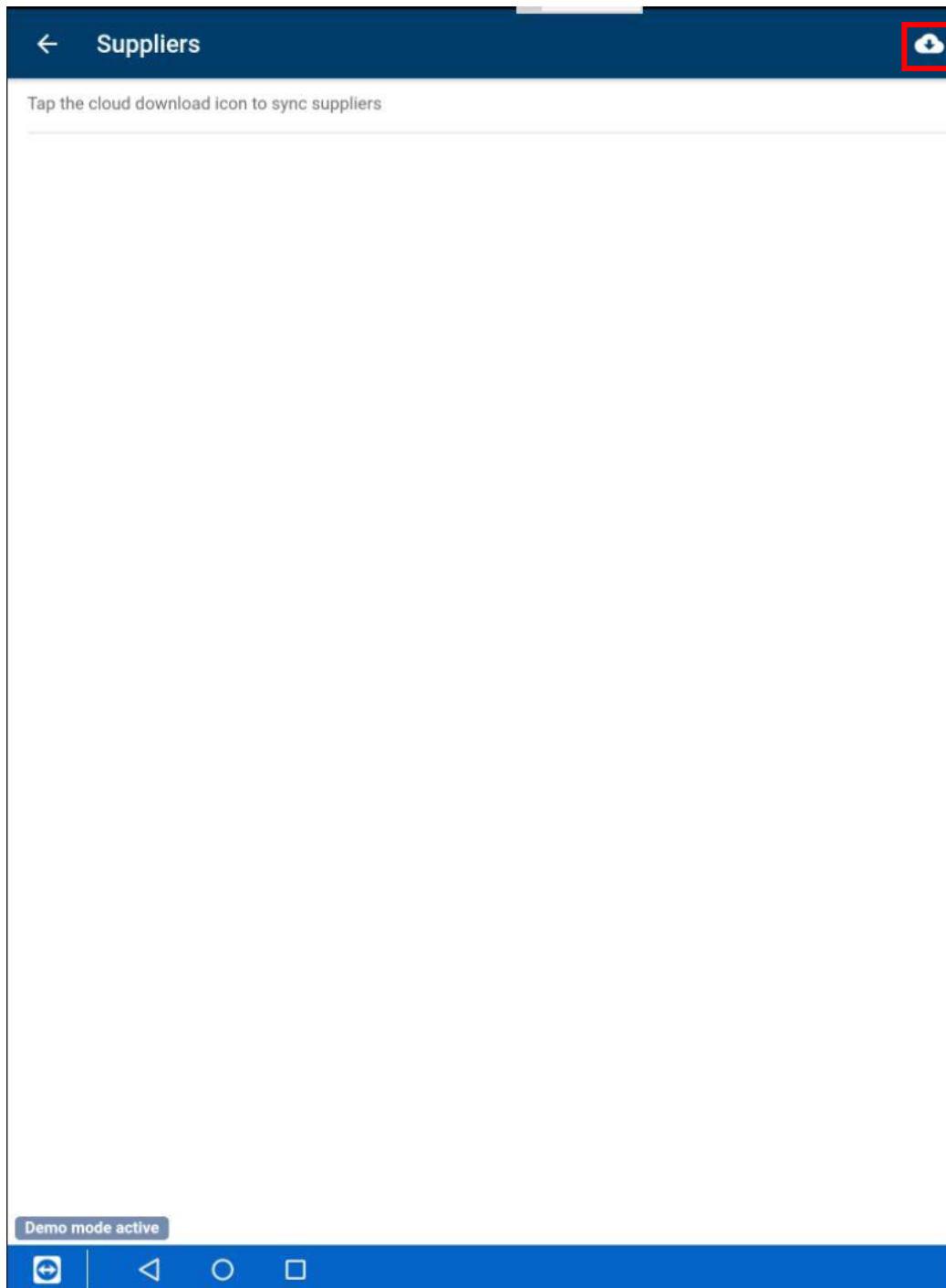
Step 2: Then choose settings



Step 3: Now download your suppliers to the app/tablet by selecting **Suppliers**



Step 4: Now select the *Cloud* icon to download your supplier list




Step 5: The suppliers have now downloaded


Suppliers
Acorn Produce (EC 343434)
Acorn Produce (EC 343434)
Apo Fruit (EC 323232)
Apo Fruit (EC 323232)
Arganto Produce (EC 333333)
Arganto Produce (EC 333333)
Ava Cheese Supplier (EC 272727)
Bakery Supplier (EC 141414)
Cheese supplier (EC 222222)
Cleaning services (EC 262626)
Cold Store (EC 363636)
Cold Store (EC 363636)
Customer 1 (EC 343434)
Dairy supplier (EC 212121)
Distribution Centre 1 (EC 353535)
Distribution Centre 1 (EC 353535)
FC Farm (FC 101010)
Finished Foods (EC 292929)
Fruit Supplier (EC 151515)
Ingredient Trading Agent (Agent)
Demo mode active Ingredient Supplier (EC 202020)

Step 6: Now select back



Step 7: Select back again


 Settings



Application

Build Version2.3.1

NotificationsOn




User

NameSteve Jones

Emailuser@democo.com

SiteGroup



Company Data

Products


Suppliers

Specifications

Audits

Auto Sync Settings


LanguageEN



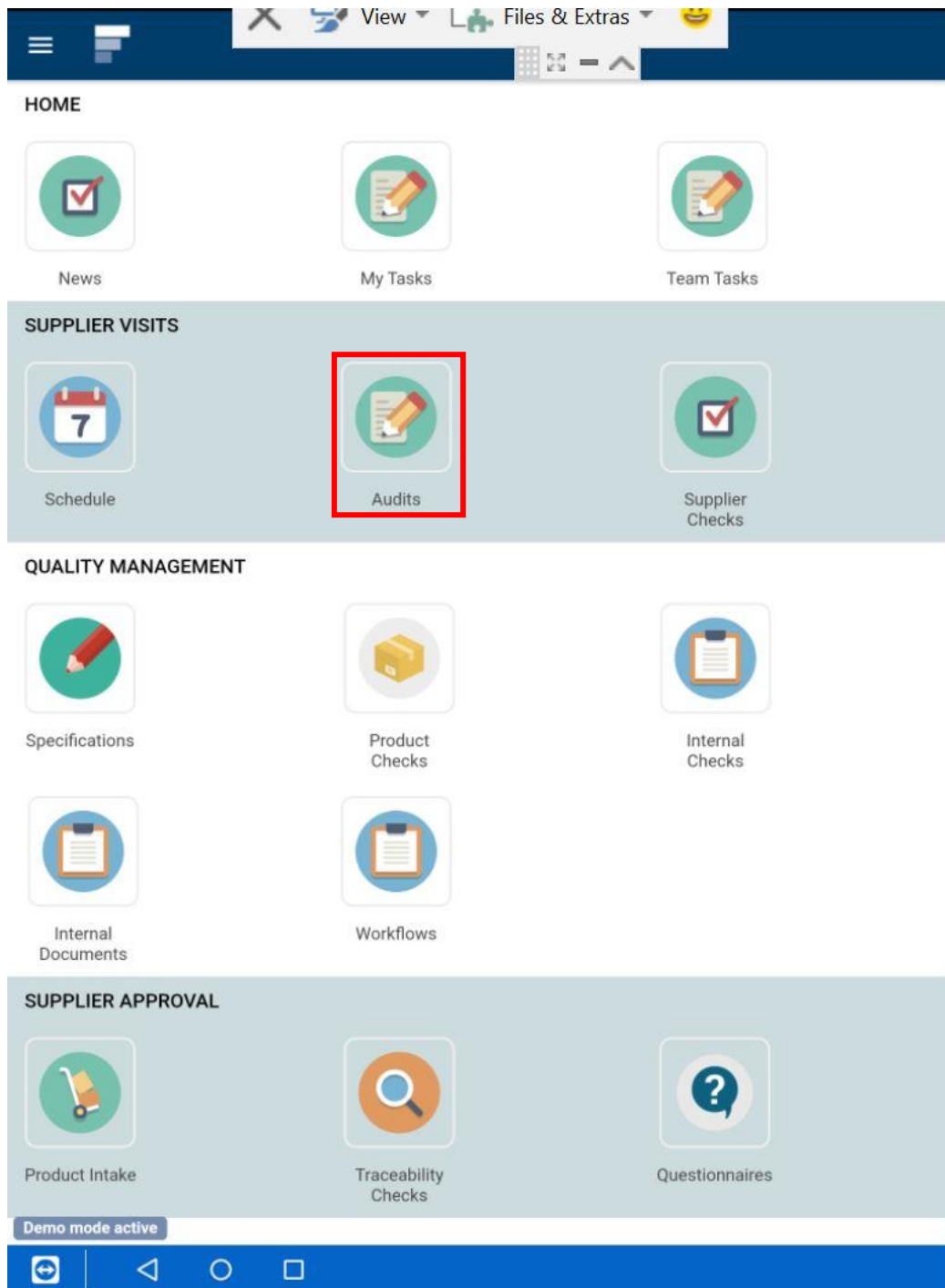
Device Data

CLEAR APPLICATION DATA

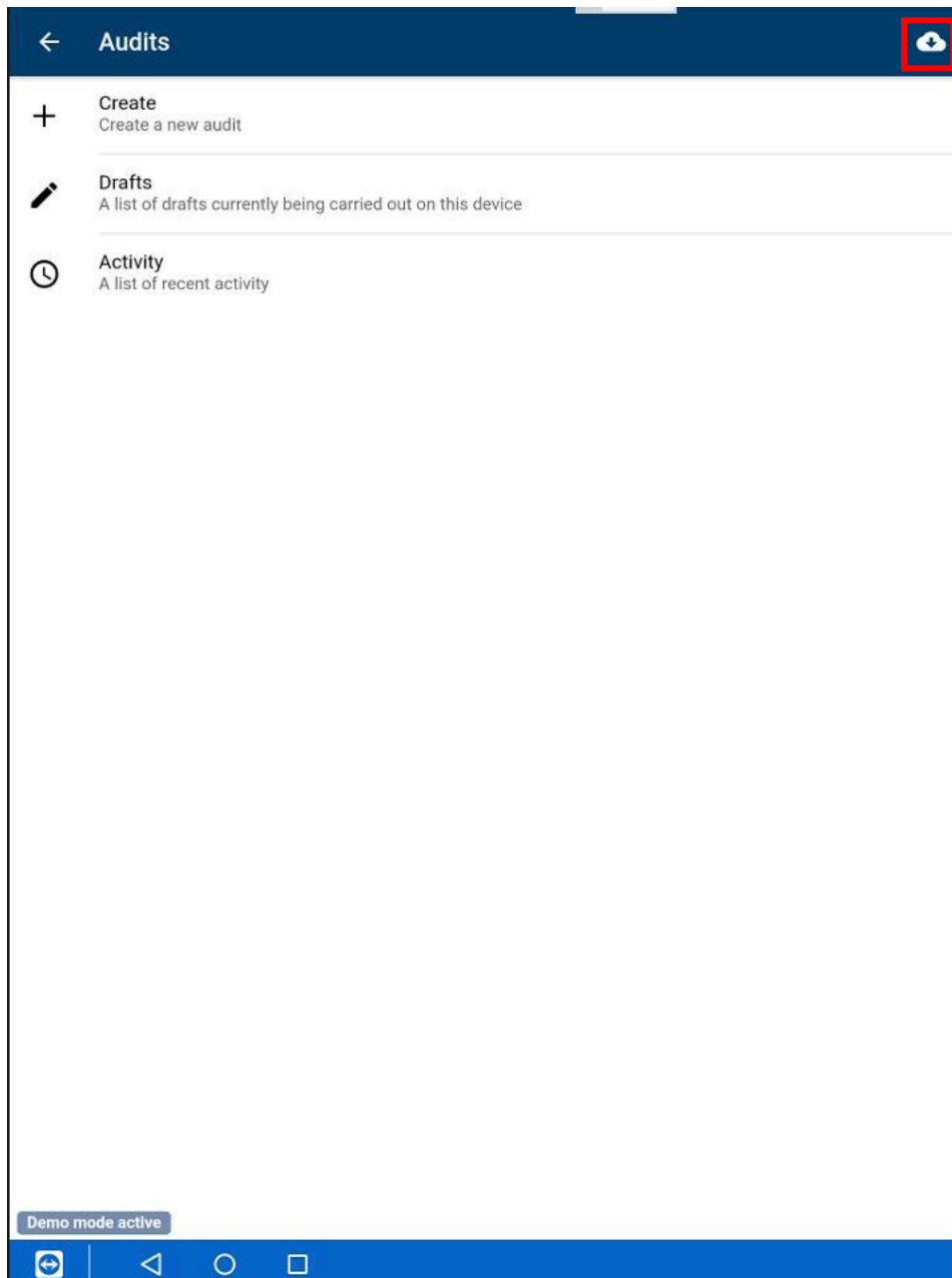
Demo mode active



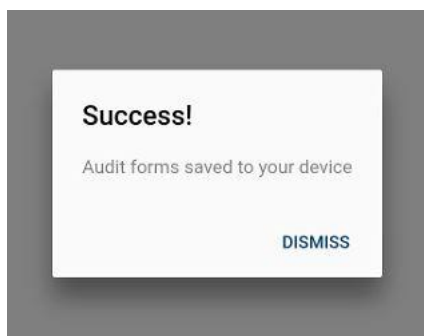
Step 8: You are back at the home screen. Now select **Audits**



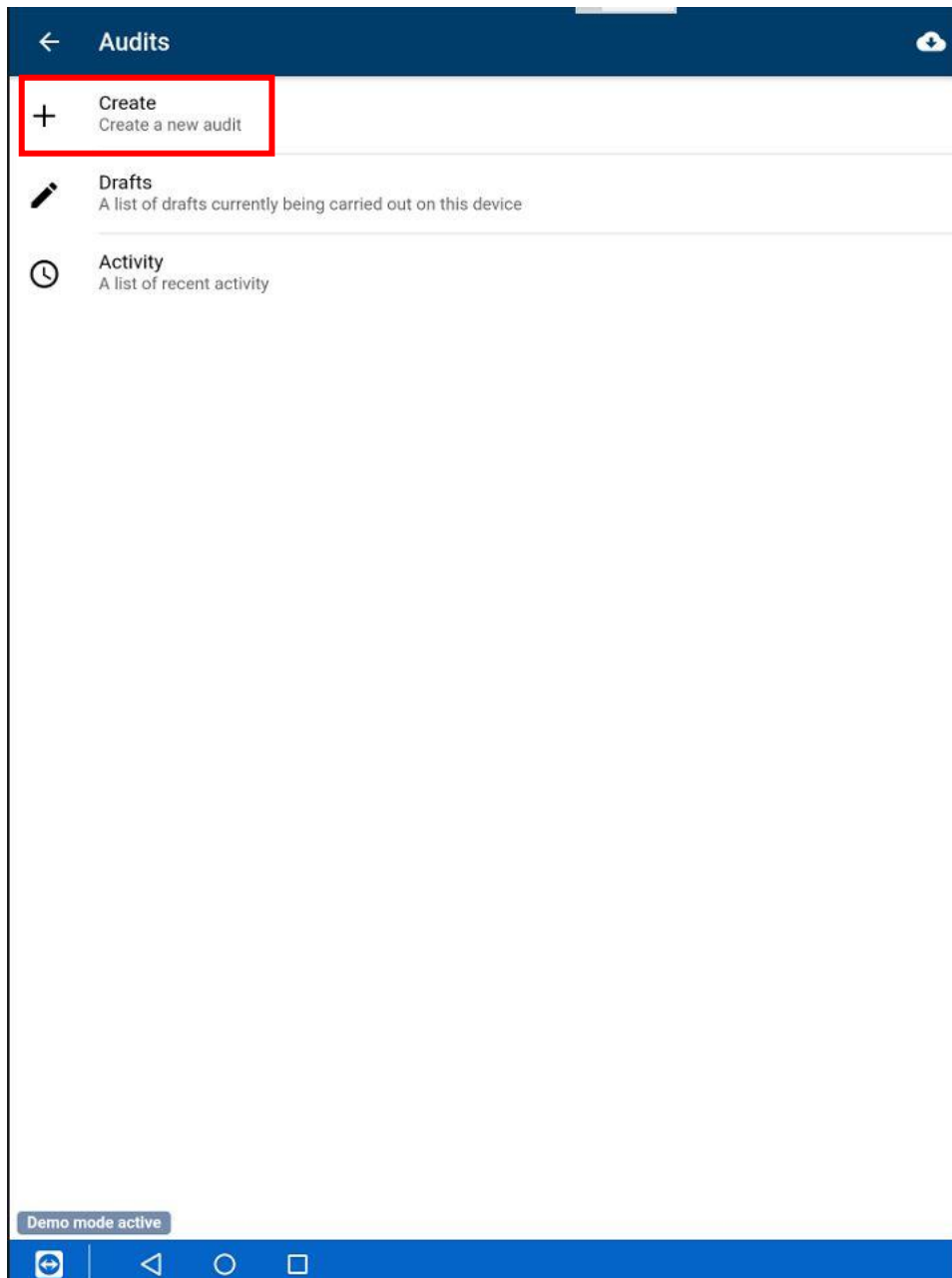
Step 9: Now download your templates to the App/tablet by select the Cloud icon



Step 10: When they download ok you'll see this notification



Step 11: Now select *Create*



Step 12: Select the details below, taking care to select your checklist too.

← Audit Form

SAVE

Company Site *	
Demo Co (Group)	▼
Audit Type *	
Supplier Audit 1	▼
Checklist	
Supplier Audit Checklist	<input checked="" type="checkbox"/>
Auditor *	
Steve Jones	▼
Supplier *	
Apo Fruit	▼
Audit Date *	
05/10/2020	
Custom Field - Product Type	
Tap To Enter...	
Custom 2	
Tap To Select...	▼
Attendees	
Tap To Enter...	
Other Comments	

Demo mode active

↔

◀

○

◻

Step 13: Select **Save** when done

Audit Form SAVE

Company Site *

Demo Co (Group)

Audit Type *

Supplier Audit 1

Checklist

Supplier Audit Checklist ☒

Auditor *

Steve Jones

Supplier *

Apo Fruit

Audit Date *

05/10/2020

Custom Field - Product Type

Tap To Enter...

Custom 2

Tap To Select...

Attendees

Tap To Enter...

Other Comments

Demo mode active

Step 14: Further tabs now appear at the bottom, start with the **Data Form** if you have activated one

Audit Detail

Company Site

Demo Co (Group)

Audit Type

Supplier Audit 1

Checklist

Supplier Audit Checklist

Auditor

Steve Jones

Supplier

Apo Fruit

Audit Date

05/10/2020

Custom Field - Product Type

Custom 2

Attendees


Other Comments

Bottom Navigation Bar:

- Demo mode active
- Data Form
- Checklist
- Items


Pen Icon: A blue circular button with a white pen icon, located in the bottom right corner of the screen.




Step 15: Select the pen icon to answer this part of the audit

← Supplier Audit 1 

Audit Reason

Reason



Demo mode active  Data Form  Checklist  Items

Step 16: Choose answer from whatever questions are before you. When done select **Save**

← Audit Checklist

SAVE

Audit Reason ✓

Reason

New Supplier ▼

MARK SECTION AS COMPLETE

Demo mode active

Step 17: Now choose **Checklist** at the bottom, and then to begin the checklist choose the edit button

← Audit Checklist

Factory & site standards EDIT

× CCP Control

HACCP EDIT

× HACCP

Details Data Form Checklist Items

Step 18: Now select your answer and **Save** when done. If you choose **Non-Compliant** this will open a comments box and will create an Audit Item or NC automatically as this is the setting.

←

Audit Checklist

SAVE

Factory & site standards

☒

CCP Control

Non-Compliant

☒

Compliant

☐

Commenst go here

Demo mode active

↔

◀

○

□

Step 19: Your checklist will look like this as you go through it.

The screenshot shows a mobile application interface for an 'Audit Checklist'. At the top, a dark blue header bar contains a back arrow, the title 'Audit Checklist', and a cloud icon. Below the header, the main content area is divided into sections. The first section, 'Factory & site standards', has a light grey background and an 'EDIT' button with a pencil icon. It contains a checklist item with a checkmark, 'CCP Control', and 'Non-Compliant'. The second section, 'HACCP', also has a light grey background and an 'EDIT' button. It contains a checklist item with a checkmark, 'HACCP', and 'Compliant'. At the bottom, a light grey navigation bar features four icons: a document, a checklist, a checkmark, and a list. Below these icons are the labels 'Demo mode active', 'Data Form', 'Checklist', and 'Items'. The very bottom of the screen shows a blue Android-style navigation bar with standard icons.

← Audit Checklist

Factory & site standards EDIT

✓ CCP Control
Non-Compliant

HACCP EDIT

✓ HACCP
Compliant

Demo mode active Data Form Checklist Items

Step 20: To view your audit items, edit them or add one ad hoc select **Items** at the bottom



Step 21: To view your audit item that was created automatically by the checklist & edit it, select it. You can change the answers below Set Category or Status and add pictures. When done select **Save**

← Audit Item SAVE

Location

Factory & site standards ▼

Type

CCP Control ▼

Category

Major ▼

Status

Requires Response ▼

Comments

Commenst go here

Image 1

Image 2

Image 3

Demo mode active

Step 22: To add an audit item ad hoc select the pen icon

← Audit Items

Major
Factory & site standards
CCP Control
Commenst go here

+

Demo mode active Data Form Checklist Items

Step 23: Fill in your answers from the dropdown lists, select **Save** when done

← Audit Item **SAVE**

Location

Factory & site standards ▼

Type

CCP Control ▼

Category

Minor ▼

Status

No Action Required ▼

Comments

Tap To Enter...

Image 1

Image 2

Image 3

Step 24: Repeat these steps above to complete your checklist and add or edit audit items

Step 25: When you are finished you need to upload the audit to the main system/desktop.
To do this select the cloud icon

← Audit Items

☐ Major
Factory & site standards
CCP Control
Requires Response
Comment go here

☐ Minor
Factory & site standards
CCP Control
No Action Required

Demo mode active | Data Form | Checklist | Items

Step 26: And the box below appears select **Yes**

Are you sure?

Do you want to submit this audit?

NO YES

Step 27: You will now see this notification. After this it is back to the desktop to complete your audit steps

Success!

Audit has been submitted

OK

3.3 SENDING THE AUDIT TO YOUR SUPPLIERS FOR RESPONSE

Step 1: In the supplier audit manager select the audit you want to send to your supplier the select **Send**

Supplier Audit Manager

Company Audits | Audit Items | Received Customer Audits | Activity Overview | Reports | Admin

Date (From)
 Audit Site
 Supplier
 Supplier Associated Site

Date (To)
 Auditor
 Supplier Type
 Supplier Sub Type

Status
 Audit Type
 Lead Technical Manager
 Sort

Audit Score Rating
 Custom 2
 Internal Review Status
 Search

Add New Audit | Delete Selected | Export...

	Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Custom 2	Score	Status	Actions
<input type="checkbox"/>	01/10/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Supplier Audit 1	Corn		0 - Grade AA (APPROVED)	In Progress	View View Summary Update Audit Request Internal Review Notify Team Members Send PDF Report Send Send Reminder Recall Audit Audit Links Reopen Audit Mark as Complete
<input type="checkbox"/>	09/09/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Cold Storage			0 - Grade AA (APPROVED)	In Progress	Not Applicable

Step 2: Select the details below

Supplier Audit Manager

Send Audit

Follow Up Action Required ☒ Yes

Share Data Form ☒ Yes

Share Checklist ☒ Yes

Share Document ☒ Yes

Include Message

Confidential Share ☒ Yes

Share With ☒ Company User ☐ Email Address

Company User Acorn Produce -- Select -- 1 Users Can Respond Add..

Company User/Email Address	Company	Access
Acorn Company Team	Acorn Produce	Can Respond

Audit Items

Response Required By Date ☐ Single Date for all Audit Items ☒ Specific Date for each Audit Item

#	Category	Location	Type	Comment	Status	Required By Date
1	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	Enter comment here	Requires Response	15/10/2020 17:00

Select if follow up action is required

Share your data form or not

Share your checklist or not

Share attached documents or not

Select if this should be confidential

Select the user to share with & if they can respond or read, then select add.

Select the response for the audit items is the same date or individual dates for each

Cancel Share

Step 3: Select **Share** when done the status will now be **Awaiting Response**

Supplier Audit Manager

Company Audits | Audit Items | Received Customer Audits | Activity Overview | Reports | Admin

The Audit has been successfully shared.

Date (From)
 Date (To)
 Status
 Audit Score Rating
 Audit Site
 Auditor
 Audit Type
 Custom 2
 Supplier
 Supplier Type
 Lead Technical Manager
 Internal Review Status
 Supplier Associated Site
 Supplier Sub Type
 Sort
 Search

Add New Audit | Delete Selected | Export...

Viewing 13 results | Page 1 of 1

	Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Custom 2	Score	Status	Internal Review Status
<input type="checkbox"/>	01/10/2020	Group	Steve Jones	Acom Produce	EC 343434	Steve Jones	Fruit	Supplier Audit 1	Corn		0 - Grade AA (APPROVED)	Awaiting Response	Not Applicable

3.4 SUPPLIER SIDE RESPONDING TO AN AUDIT

3.4.1 VIEW AUDIT

Step 1: You will receive an email & notification in your task manager like this

Home | Interactive Dashboards

Latest News

It would require a 'monumental shift' for sustainability to top the corporate agenda

Significant commitments on issues like food waste or plastic pollution would suggest that sustainability is moving up the corporate priority list. However, with consumer sentiment sliding and upward pricing pressure on the horizon, it would require a "monumental shift" for sustainability to continue its ascent in the boardroom.

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My Tasks 10 outstanding

- Steve Jones sent you an Audit - Response Required
- Steve Jones shared a Document (Sign-Off Req-)
- Steve Jones sent you a document exception - (Sign-Off Required)
- Steve Jones shared a Document (Sign-Off Req-)
- Steve Jones shared a Document (Sign-Off Req-)

View All Tasks

Or

Go to **Supplier Approval, Received Audits**

News & Statistics | Supplier Approval | Quality Management | Trading & Planning | More | User 1

Home | Interactive Dashboards

Latest News

It would require a 'monumental shift' for sustainability to top the corporate agenda

Significant commitments on issues like food waste or plastic pollution would suggest that sustainability is moving up the corporate priority list. However, with consumer sentiment sliding and upward pricing pressure on the horizon, it would require a "monumental shift" for sustainability to continue its ascent in the boardroom.

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Supplier Approval

- Customer Tools
 - Received Questionnaires
 - Received Audits**
 - Received Supplier Checks
 - Received Traceabilities
 - Received Product Intakes
 - Received Supplier Documents
 - Received Risk Assessments
 - Received Incidents
 - Upcoming Supplier Visits
 - Received Remote Audits
- Supplier Tools
 - Company / Approval Documents
 - Customer Required Documents
 - Linked Customers
 - Customer Activity Overview

My Tasks 10 outstanding

- Steve Jones sent you an Audit - Response Required
- Steve Jones shared a Document (Sign-Off Req-)
- Steve Jones sent you a document exception - (Sign-Off Required)
- Steve Jones shared a Document (Sign-Off Req-)
- Steve Jones shared a Document (Sign-Off Req-)

View All Tasks

Step 2: The audit opens where you can view

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Activity Overview Reports

Received Between:

Shared With (Site): All

Shared With (User): All

Rec'd From (Company): All

Rec'd From (Person): All

Status: All

Delete Selected

Viewing 1 results | Page 1 of 1

	Audit Date	Respond By	Site	Auditor	Shared With	Status	
<input type="checkbox"/>	01/10/2020	15/10/2020	Apo Fruit	Steve Jones Demo Co	User 1 Abattoir - Apo Fruit	Requires Action	<input type="button" value="Full Report"/> <input type="button" value="Summary"/> <input type="button" value="Respond"/>

Step 3: To view select **Full Report**

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Activity Overview Reports

Received Between:

Shared With (Site): All

Shared With (User): All

Rec'd From (Company): All

Rec'd From (Person): All

Status: All

Delete Selected

Viewing 1 results | Page 1 of 1

	Audit Date	Respond By	Site	Auditor	Shared With	Status	
<input type="checkbox"/>	01/10/2020	15/10/2020	Apo Fruit	Steve Jones Demo Co	User 1 Abattoir - Apo Fruit	Requires Action	<input type="button" value="Full Report"/> <input type="button" value="Summary"/> <input type="button" value="Respond"/>

Step 4: View full audit

Audit Summary



Supplier	Apo Fruit
Audit Type	Supplier Audit 1
Auditor	Steve Jones
Audit Date	01/10/2020
Audit Respond By Date	15/10/2020
Attendees	Ravi
Custom Field - Product Type	Corn
Custom 2	1
Audit Items	1 (1 - Major)
Audit Score	0 - Grade AA (APPROVED)

Shared With	User 1 Abattoir - Apo Fruit
Status	Requires Action
Internal Technical Contacts	Steve Jones

Supplier Details

Linked FC Company	Apo Fruit
Factory Code	EC 323232
Telephone	12345678910
Email	info@apofruit.com
Website	apofruit.com
Address	123 Demo Street, Demo City, B21 45R
Country	United Kingdom
Supplied Via	
Supplied Via Access	No
Associated Sites	Group
Approval Document Status	Compliant
Accreditations	BRC Global Standard: 1234567

Audit Data Form

Audit Reason

Reason: New Supplier

Audit Items

Sort by: Location Type Category

	Location	Type	Category	Status	Comments	Score	Response Required By	Proposed Completion
1	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	Major	Requires Response	Issue	0	15/10/2020 17:00:00	---


Checklists

Section	Check Details	Checked	Comment
1. Supplier Audit Checklist			
Factory & site standards	CCP Control	<input checked="" type="checkbox"/>	Compliant
HACCP	HACCP	<input checked="" type="checkbox"/>	Non-Compliant - Issue

Step 5: Select *back* when done

Back	Hide Updates History	Export to PDF
------	----------------------	---------------

Audit Summary



Supplier	Apo Fruit
Audit Type	Supplier Audit 1
Auditor	Steve Jones
Audit Date	01/10/2020
Audit Respond By Date	15/10/2020
Attendees	Ravi
Custom Field - Product Type	Corn
Custom 2	1
Audit Items	1 (1 - Major)
Audit Score	0 - Grade AA (APPROVED)

3.4.2 EXPORT TO PDF

To export the audit to a PDF.

Step 1: Sign in go to the Supplier Audit Manager, select **Full Report**

Supplier Audit Manager

Company Audits Audit Items **Received Customer Audits** Activity Overview Reports

Received Between: Shared With (Site): Rec'd From (Company): Status: Filter
 Clear Filters

Shared With (User): Rec'd From (Person):


Delete Selected Viewing 1 results | Page 1 of 1

	Audit Date	Respond By	Site	Auditor	Shared With	Status
<input type="checkbox"/>	01/10/2020	15/10/2020	Apo Fruit	Steve Jones Demo Co	User 1 Abattoir - Apo Fruit	Requires Action Full Report Summary Respond

Step 2: Select Export to PDF

Back Hide Updates History **Export to PDF**

Audit Summary



Supplier	Apo Fruit
Audit Type	Supplier Audit 1
Auditor	Steve Jones
Audit Date	01/10/2020
Audit Respond By Date	15/10/2020
Attendees	Ravi
Custom Field - Product Type	Corn
Custom 2	1
Audit Items	1 (1 - Major)
Audit Score	0 - Grade AA (APPROVED)

3.4.3 RESPOND TO THE AUDIT ITEMS & NCS

Step 1: Sign in go to the Supplier Audit Manager, select **Respond**

Supplier Audit Manager

Company Audits | Audit Items | **Received Customer Audits** | Activity Overview | Reports

Received Between: Shared With (Site): All Shared With (User): All Rec'd From (Company): All Rec'd From (Person): All Status: All

[Filter](#) [Clear Filters](#)

[Delete Selected](#) Viewing 1 results | Page 1 of 1

	Audit Date	Respond By	Site	Auditor	Shared With	Status	
<input type="checkbox"/>	01/10/2020	15/10/2020	Apo Fruit	Steve Jones Demo Co	User 1 Abattoir - Apo Fruit	Requires Action	Full Report Summary Respond

Step 2: View the audit data form if it is been shared with you by selecting **Audit Data Form**

Supplier Audit Manager - Respond to Audit [Back](#)

Respond to the relevant **Audit Items** & **Audit Attachments** using the forms below. Once you have added all your responses please click **Send Response** to send these responses back to the Auditor.

[Audit Details](#) **[Audit Data Form](#)** [Document](#)

Audit Date: 01/10/2020
 Respond By Date: 15/10/2020
 Auditor: Steve Jones - Demo Co
 Shared With: User 1 Abattoir - Apo Fruit
 Attachments: No Attachments

[Cancel](#) [Save and Exit](#) [Send Response](#)

Audit Items

#	Category	Type	Location	Status	Comments	Img(s)	Respond By Date	Responses		
1	Major	HACCP shall have senior management commitment and shall be implemented through the	HACCP	Requires Response	Issue		15/10/2020	No	Add Response	i

[Select Language](#)

Step 3: Review and select **Back** when done

Supplier Audit Manager - Respond to Audit [Back](#)

Respond to the relevant **Audit Items** & **Audit Attachments** using the forms below. Once you have added all your responses please click **Send Response** to send these responses back to the Auditor.

[Audit Details](#) [Audit Data Form](#) [Document](#)

Audit Reason

Reason New Supplier

Step 4: Now view the checklist & document the same way as above if it has been shared with you. When complete select **Audit Details** again

Supplier Audit Manager - Respond to Audit

[← Back](#)

Respond to the relevant **Audit Items** & **Audit Attachments** using the forms below. Once you have added all your responses please click **Send Response** to send these responses back to the Auditor.

Audit Details [Audit Data Form](#) [Document](#)

Audit Reason

Reason

New Supplier

Step 5: Now view the audit items & when ready to respond select **Add Response**

Supplier Audit Manager - Respond to Audit

[← Back](#)

Respond to the relevant **Audit Items** & **Audit Attachments** using the forms below. Once you have added all your responses please click **Send Response** to send these responses back to the Auditor.

Audit Details [Audit Data Form](#) [Document](#)

Audit Date:	01/10/2020
Respond By Date:	15/10/2020
Auditor:	Steve Jones - Demo Co
Shared With:	User 1 Abattoir - Apo Fruit
Attachments:	No Attachments
Cancel Save and Exit Send Response	

Audit Items

#	Category	Type	Location	Status	Comments	Img(s)	Respond By Date	Responses	Click to add Response	
1	Major	HACCP shall have senior management commitment and shall be implemented	HACCP	Requires Response	Issue		15/10/2020	No	Add Response	

Step 6: Select the responsible person, the date and add your responses in the text areas below. When done select **Add Response**

Add Response

Responsible Person

User 1 Abattoir

Completion / Proposed Completion Date

01/10/2020

Attach File

Choose file

No file chosen

Choose file

No file chosen

Choose file

No file chosen

Choose file

No file chosen

Choose file

No file chosen

Choose file

No file chosen

Corrective Action *

Corrective action

Immediate Correction *

Immediate action

Root Cause *

Root cause

Preventative Action *

Preventative action

Cancel

Add Response

Step 7: Your added response looks like this below

Audit Items									
#	Category	Type	Location	Status	Comments	Img(s)	Respond By Date	Responses	
1	Major	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	HACCP	Requires Response	Issue		15/10/2020	Yes (1)	<div>Add Response</div>

Responses								
#	Person Responsible	Completion Date	Corrective Action	Immediate Correction	Root Cause	Preventative Action	Attachments	
1	User 1 Abattoir	01/10/2020	Corrective action	Immediate action	Root cause	Preventative action		

3.4.4 EDIT A RESPONSE

To edit a response

Step 1: Sign in go to the Supplier audit manager, then **Respond**, then select the edit button

Audit Items									
#	Category	Type	Location	Status	Comments	Img(s)	Respond By Date	Responses	
1	Major	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	HACCP	Requires Response	Issue		15/10/2020	Yes (1)	Add Response

Responses								
#	Person Responsible	Completion Date	Corrective Action	Immediate Correction	Root Cause	Preventative Action	Attachments	
1	User 1 Abattoir	01/10/2020	Corrective action	Immediate action	Root cause	Preventative action		Edit

Step 2: Now edit your response as you did above & select **Add Response** when done.

Add Response

Responsible Person

User 1 Abattoir

Completion / Proposed Completion Date

01/10/2020

Attach File

Choose file

No file chosen

Choose file

No file chosen

Choose file

No file chosen

Choose file

No file chosen

Choose file

No file chosen

Choose file

No file chosen

Corrective Action *

Corrective action

Immediate Correction *

Immediate action

Cancel

Delete


Add Response

3.4.5 DELETE A RESPONSE

To delete a response:

Step 1: Sign in go to the Supplier audit manager, then **Respond**, then select the edit button

Audit Items									
#	Category	Type	Location	Status	Comments	Img(s)	Respond By Date	Responses	
1	Major	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	HACCP	Requires Response	Issue		15/10/2020	Yes (1)	Add Response

Responses								
#	Person Responsible	Completion Date	Corrective Action	Immediate Correction	Root Cause	Preventative Action	Attachments	
1	User 1 Abattoir	01/10/2020	Corrective action	Immediate action	Root cause	Preventative action		

Step 2: Now edit your response as you did above & select **Delete** when done.

Add Response

Responsible Person

User 1 Abattoir

Completion / Proposed Completion Date

01/10/2020

Attach File

Choose file

No file chosen

Choose file

No file chosen

Choose file

No file chosen

Choose file

No file chosen

Choose file

No file chosen

Choose file

No file chosen

Corrective Action *

Corrective action

Immediate Correction *

Immediate action

Cancel

Delete

Add Response

3.4.6 SEND THE RESPONSE

You are now ready to send the response

Step 1: Review your information and when ready select *Send Response*

Supplier Audit Manager - Respond to Audit ← Back

Respond to the relevant **Audit Items** & **Audit Attachments** using the forms below. Once you have added all your responses please click **Send Response** to send these responses back to the Auditor.

[Audit Details](#) [Audit Data Form](#) [Document](#)

Audit Date:	01/10/2020
Respond By Date:	15/10/2020
Auditor:	Steve Jones - Demo Co
Shared With:	User 1 Abattoir - Apo Fruit
Attachments:	No Attachments

Audit Items

#	Category	Type	Location	Status	Comments	Img(s)	Respond By Date	Responses	Click to add Response
1	Major	HACCP shall have senior management commitment and shall be implemented	HACCP	Requires Response	Issue		15/10/2020	No	<input type="button" value="Add Response"/>

Select Language

Step 2: Include a message if necessary, then select *Send Response*

Send Response ×

Message to include:

Include message |

Step 3: Your audit status now reverts to *Awaiting Response*

Supplier Audit Manager

Company Audits | Audit Items | **Received Customer Audits** | Activity Overview | Reports

Received Between: Shared With (Site): All Shared With (User): All Rec'd From (Company): All Rec'd From (Person): All Status: All [Filter](#) [Clear Filters](#)

[Delete Selected](#) Viewing 1 results | Page 1 of 1

	Audit Date	Respond By	Site	Auditor	Shared With	Status	
<input type="checkbox"/>	01/10/2020	15/10/2020	Apo Fruit	Steve Jones Demo Co	User 1 Abattoir - Apo Fruit	Awaiting Response	Full Report Summary Respond

3.4.7 RESPONDING TO FURTHER DETAIL REQUIRED

If you have sent your response back and the customer asks you to add further info you will get an email & another task in your task manager.

Step 1: Select the task

Home Interactive Dashboards

Latest News

« Previous Next »

It would require a 'monumental shift' for sustainability to top the corporate agenda
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My Tasks 236 outstanding

- Steve Jones has requested additional information for an audits item(s) - EC 323232 - Apo Fruit - Supplier Audit 1
- Steve Jones sent you an Audit - Response Required
- Steve Jones requested a required document
- Steve Jones declined a Document Sign Off Comment (Re-sign Off Req.)
- Steve Jones shared a Document (Sign-Off Req.)

[View All Tasks](#)

Step 2: See the status below to add a new further detail select *Add Response*

Audit Items

#	Category	Type	Location	Status	Comments	Img(s)	Respond By Date	Responses	
1	Major	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	HACCP	Further Detail Required	Issue		15/10/2020	Yes (1)	Add Response

Additional Information Requested

Request Date	Requested By	Requested Information
01/10/2020	Steve Jones	Additional information request

Step 3: Add further detail here select **Add Response**

Add Response

Responsible Person

User 1 Abattoir

Completion / Proposed Completion Date

01/10/2020

Attach File

Choose file

No file chosen

Choose file

No file chosen

Choose file

No file chosen

Choose file

No file chosen

Choose file

No file chosen

Choose file

No file chosen

Corrective Action *

Add further detail

Immediate Correction *

Add further detail

Cancel

Add Response

Step 4: The further detail responses looks like this below

Responses

#	Person Responsible	Completion Date	Corrective Action	Immediate Correction	Root Cause	Preventative Action	Attachments
1	User 1 Abattoir	01/10/2020	Corrective action	Immediate action	Root cause	Preventative action	
1	User 1 Abattoir	01/10/2020	Add further detail	Add further detail			

Step 5: When done and ready to send back select **Send Response**

Supplier Audit Manager - Respond to Audit ← Back

Respond to the relevant **Audit Items** & **Audit Attachments** using the forms below. Once you have added all your responses please click **Send Response** to send these responses back to the Auditor.

[Audit Details](#) [Audit Data Form](#) [Document](#)

Audit Date:	01/10/2020
Respond By Date:	15/10/2020
Auditor:	Steve Jones - Demo Co
Shared With:	User 1 Abattoir - Apo Fruit
Attachments:	No Attachments

Audit Items

#	Category	Type	Location	Status	Comments	Img(s)	Respond By Date	Responses		
1	Major	HACCP shall have senior management commitment and shall be implemented through the	HACCP	Further Detail Required	Issue		15/10/2020	Yes (2)	Add Response	Info

Select Language

Step 6: Include message

Send Response ×

Message to include:

Include message |

Step 7: Once sent the status reverts to **Awaiting Response**

	Audit Date	Respond By	Site	Auditor	Shared With	Status	
<input type="checkbox"/>	01/10/2020	15/10/2020	Apo Fruit	Steve Jones Demo Co	User 1 Abattoir - Apo Fruit	Awaiting Response	Full Report Summary Respond

Step 8: Once they respond and completes to Status reverts to **Completed**

3.5 SEND REMINDER TO RECIPIENTS

You can send a reminder to your recipient to remind them to complete the audit.

Step 1: Select the audit you want to remind the person about then select **Send Reminder**

Supplier Audit Manager

Company Audits | Audit Items | Received Customer Audits | Activity Overview | Reports | Admin

Date (From): Date (To): Status: All Audit Score Rating: All

Audit Site: All Auditor: All Audit Type: All Custom 2: All

Supplier: All Supplier Type: All Lead Technical Manager: All Internal Review Status: All

Supplier Associated Site: All Supplier Sub Type: All Sort: Audit Created Search:

Filter Clear Filters

Add New Audit Delete Selected Export...

	Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Custom 2	Score	Status	Action
<input type="checkbox"/>	05/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1			0 - Grade AA (APPROVED)	In Progress	View View Summary Update Audit Request Internal Review Notify Team Members Send PDF Report Edit Share Visibility Send Reminder Recall Audit Audit Links Reopen Audit Mark as Complete
<input type="checkbox"/>	01/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1	Corn	1	0 - Grade AA (APPROVED)	Completed	

Step 2: Select ok on this and the reminder has been sent.

Supplier Audit Manager

News & Statistics | Supplier Approval

demo.foodsconnected.com says
Are you sure you would like to send a reminder email to the recipient?

OK Cancel

Company Audits | Audit Items | Received Customer Audits

Date (From): Date (To): Status: All Audit Score Rating: All

Audit Site: All Auditor: All Audit Type: All Custom 2: All

Supplier: All Supplier Type: All Lead Technical Manager: All Internal Review Status: All

Supplier Associated Site: All Supplier Sub Type: All Sort: Audit Created Search:

Filter Clear Filters

Add New Audit Delete Selected Export...

	Factory	Lead Technical	Supplier	Custom Field -	Custom	Action
						View View Summary Update Audit Request Internal Review Notify Team Members Send PDF Report Edit Share Visibility Send Reminder

3.6 EDIT SHARE VISIBILITY

This allows you to change what the recipient can see if you need to do that

Step 1: Select the audit you want to change the share visibility with, then select **Edit Share Visibility**

The screenshot shows the 'Supplier Audit Manager' interface. At the top, there are navigation tabs: 'Company Audits', 'Audit Items', 'Received Customer Audits', 'Activity Overview', 'Reports', and 'Admin'. Below these are various filters for Date (From/To), Audit Site, Auditor, Supplier, Supplier Type, Supplier Sub Type, Status, Audit Score Rating, Custom 2, Lead Technical Manager, Internal Review Status, Sort, and Search. A context menu is open over a table row, with 'Edit Share Visibility' highlighted in red. The table has columns: Audit Date, Audit Site, Auditor, Supplier, Factory Code, Lead Technical Manager, Supplier Type, Audit Type, Custom Field - Product Type, Custom 2, Score, and Status. The first row shows an audit from 05/10/2020 for 'Group' by 'Steve Jones' at 'Apo Fruit' with a score of '0 - Grade AA (APPROVED)'.

Step 2: Select on or off for the items you want to share or not add a comment if necessary. When done select **Save**.

The 'Edit Share Visibility' dialog box is shown. It contains a message: 'Modify the visibility of what the supplier can see in the audit. The supplier will receive an email notifying them of the changes made, including the optional message.' Below this, there are three settings: 'Shared With' (User 1 Abattoir - Apo Fruit), 'Share Data Form' (set to 'No' and highlighted with a red box), and 'Share Checklist' (set to 'Yes'). There is also a text area for 'Include Message (Optional)' with the placeholder 'Enter message...'. At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

Step 3: This will now limit or increase their visibility of the audit details

3.7 RESPONDING TO THE SUPPLIERS RESPONSE

3.7.1 VIEWING THE RESPONSE

Step 1: You will receive an email & task in your task manager like this

Home | Overall Compliance | More ▾

Latest News

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My Tasks 133 outstanding

- User 1 Abattoir responded to an Audit
- You have received a remote audit standard for review (test)
- You have received a remote audit standard for review (test)
- Steve Jones assigned an Internal Check Issue to you
- Steve Jones assigned an Internal Check Issue to you

View All Tasks

Or

Go to the supplier audit manager, select edit beside the audit then select **View**

Supplier Audit Manager

Company Audits | Audit Items | Received Customer Audits | Activity Overview | Reports | Admin

Date (From) [] Date (To) [] Status [All] Audit Score Rating [All]

Audit Site [All] Auditor [All] Audit Type [All] Custom 2 [All]

Supplier [All] Supplier Type [All] Lead Technical Manager [All] Internal Review Status [All]

Supplier Associated Site [All] Supplier Sub Type [All] Sort [Audit Created] Search [Search...]

+ Add New Audit | Delete Selected | Export...

	Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Custom 2	Score	Status
<input type="checkbox"/>	01/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1	Corn	1	0 - Grade AA (APPROVED)	Require Action

View Summary
Update Audit
Request Internal Review
Notify Team Members
Send PDF Report
Edit Share Visibility
Send Reminder
Recall Audit
Audit Links
Reopen Audit
Mark as Complete

Step 2: Scroll down to view the response or responses when done select **Back** at the top

Audit Data Form

Audit Reason

Reason: New Supplier

Audit Items Sort by: Location Type Category

	Location	Type	Category	Status	Comments	Score	Response Required By	Proposed Completion
1	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	Major	Requires Response	Issue	0	15/10/2020 17:00:00	01/10/2020

Responsible Person: User 1 Abattoir

Completion Date: 01/10/2020

Corrective Action: Corrective action

Immediate Correction: Immediate action

Root Cause: Root cause

Preventative Action: Preventative action

Evidence:

3.7.2 EXPORT TO PDF

To export the audit to a PDF.

Step 1: Sign in go to the Supplier Audit Manager, select the audit then **View**

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Activity Overview Reports Admin

Date (From): Date (To): Status: All Audit Score Rating: All

Audit Site: All Auditor: All Audit Type: All Custom 2: All

Supplier: All Supplier Type: All Lead Technical Manager: All Internal Review Status: All

Supplier Associated Site: All Supplier Sub Type: All Sort: Audit Created Search: Search...

Filter

View

View Summary

Update Audit

Request Internal Review

Notify Team Members

Send PDF Report

Edit Share Visibility

Send Reminder

Recall Audit

Audit Links

Reopen Audit

Mark as Complete


	Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Custom 2	Score	Status
<input type="checkbox"/>	01/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1	Corn	1	0 - Grade AA (APPROVED)	Requires Action

Add New Audit Delete Selected Export...

Step 2: Select Export to PDF

Back Hide Updates History **Export to PDF**

Audit Summary



Supplier	Apo Fruit
Audit Type	Supplier Audit 1
Auditor	Steve Jones
Audit Date	01/10/2020
Audit Respond By Date	15/10/2020
Attendees	Ravi
Custom Field - Product Type	Corn
Custom 2	1
Audit Items	1 (1 - Major)
Audit Score	0 - Grade AA (APPROVED)

3.7.3 RESPOND TO THE AUDIT ITEMS OR NCS

Step 1: Now select the *Audit Items* tab

Supplier Audit Manager

Company Audits **Audit Items** ← Received Customer Audits Activity Overview Reports Admin

Audit Date (From) Required By Date (From) Audit Site Auditor Supplier Lead Technical Manager Audit Status Filter
 [] [] [All] [All] [All] [All] [All] Clear Filters
 Audit Date (To) Required By Date (To) Category Location Type Item Status Supplier Type
 [] [] [All] [All] [All] [All] [All]

✓ Mark Selected as Complete Viewing 11 results | Page 1 of 1

	Audit Date	Auditor	Supplier	Audit Status	Audit Item Category	Audit Item Location	Audit Item Type	Response Required By Date	Proposed Completion Date	Audit Item Status	
<input type="checkbox"/>	18/08/2020	Steve Jones	Veg Supplier (EC 161616)	Requires Response (Overdue)	---	---	---	04/06/2020 17:00:00	---	Requires Response	Q
<input type="checkbox"/>	01/10/2020	Steve Jones	Acorn Produce (EC 343434)	Requires Response	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	15/10/2020 17:00:00	---	Requires Response	Q
<input type="checkbox"/>	01/10/2020	Steve Jones	Apo Fruit (EC 323232)	Requires Response	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	15/10/2020 17:00:00	01/10/2020 00:00:00	Requires Response	Q

Select Language

Step 2: Then select the audit item or items to respond too you can see the status states **Requires Response**

Supplier Audit Manager

Company Audits **Audit Items** ← Received Customer Audits Activity Overview Reports Admin

Audit Date (From) Required By Date (From) Audit Site Auditor Supplier Lead Technical Manager Audit Status [Filter](#)
 Audit Date (To) Required By Date (To) Category Location Type Item Status Supplier Type [Clear Filters](#)

✓ Mark Selected as Complete Viewing 11 results | Page 1 of 1

	Audit Date	Auditor	Supplier	Audit Status	Audit Item Category	Audit Item Location	Audit Item Type	Response Required By Date	Proposed Completion Date	Audit Item Status	
<input type="checkbox"/>	18/08/2020	Steve Jones	Veg Supplier (EC 161616)	Requires Response (Overdue)	---	---	---	04/06/2020 17:00:00	---	Requires Response	Q
<input type="checkbox"/>	01/10/2020	Steve Jones	Acorn Produce (EC 343434)	Requires Response	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	15/10/2020 17:00:00	---	Requires Response	Q
<input type="checkbox"/>	01/10/2020	Steve Jones	Apo Fruit (EC 323232)	Requires Response	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	15/10/2020 17:00:00	01/10/2020 00:00:00	Requires Response	Q

Select Language

Step 3: Here you can view Attached Files/Images any comments but select **Responses** to view the response

Audit Item [X](#)

Attached Files/Images **Comments** **Responses**

There are currently no files/images attached to this audit item

[Close](#) [✓ Complete](#) [Awaiting Supplier Action](#) [? Further Detail Required](#)

3.7.3.1 AWAITING SUPPLIER ACTION RESPONSE

Step 1: If you are awaiting supplier action you can select **Awaiting Supplier**

Audit Item

Attached Files/Images

Comments

Responses

Responsible Person

User 1 Abattoir

Completion / Expected Completion Date

01/10/2020

Corrective Action

Corrective action

Immediate Correction

Immediate action

Root Cause

Root cause

Preventative Action

Preventative action

Evidence

Close

✓ Complete

Awaiting Supplier Action

? Further Detail Required

Step 2: The status reverts to this below

<input type="checkbox"/>	01/10/2020	Steve Jones	Apo Fruit (EC 323232)	Awaiting Supplier Action	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	15/10/2020 17:00:00	01/10/2020 00:00:00	Awaiting Supplier Action	
--------------------------	------------	-------------	-----------------------	--------------------------	-------	-------	--	---------------------	---------------------	--------------------------	--

Step 3: When the suppliers responds you get a notification, go to your **Audit Items** then select it

Supplier Audit Manager

Company Audits

Audit Items

Received Customer Audits

Activity Overview

Reports

Admin

Audit Date (From)

Required By Date (From)

Audit Site

Auditor

Supplier

Lead Technical Manager

Audit Status

Filter

Clear Filters

Audit Date (To)

Required By Date (To)

Category

Location

Type

Item Status

Supplier Type

✓ Mark Selected as Complete

Viewing 11 results | Page 1 of 1

<input type="checkbox"/>	Audit Date	Auditor	Supplier	Audit Status	Audit Item Category	Audit Item Location	Audit Item Type	Response Required By Date	Proposed Completion Date	Audit Item Status	
<input type="checkbox"/>	18/08/2020	Steve Jones	Veg Supplier (EC 181616)	Requires Response (Overdue)	---	---	---	04/06/2020 17:00:00	---	Requires Response	
<input type="checkbox"/>	01/10/2020	Steve Jones	Acorn Produce (EC 343434)	Requires Response	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	15/10/2020 17:00:00	---	Requires Response	
<input type="checkbox"/>	01/10/2020	Steve Jones	Apo Fruit (EC 323232)	Awaiting Supplier Action	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	15/10/2020 17:00:00	05/10/2020 00:00:00	Awaiting Supplier Action	

Step 4: Select the **Responses** tab, then scroll to see the latest response when done select **Complete** to confirm

Audit Item
×

Responsible Person	User 1 Abattoir
Completion / Expected Completion Date	01/10/2020
Corrective Action	Add further detail
Immediate Correction	Add further detail
Root Cause	
Preventative Action	
Evidence	

Responsible Person	User 1 Abattoir
Completion / Expected Completion Date	05/10/2020
Corrective Action	Further responses to awaiting supplier action
Immediate Correction	Further responses to awaiting supplier action
Root Cause	Further responses to awaiting supplier action
Preventative Action	Further responses to awaiting supplier action
Evidence	

Close

✓ Complete

? Further Detail Required

Step 5: The status now reverts to **Completed**

<input type="checkbox"/>	01/10/2020	Steve Jones	Apo Fruit (EC 323232)	Completed	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	15/10/2020 17:00:00	01/10/2020 00:00:00	Completed	Q
--------------------------	------------	-------------	-----------------------	-----------	-------	-------	--	---------------------	---------------------	-----------	---

3.7.3.2 FURTHER DETAIL REQUIRED RESPONSE

Step 1: If you require further detail select **Further Detail Required**

Audit Item

Attached Files/Images

Comments

Responses

Responsible Person

User 1 Abattoir

Completion / Expected Completion Date

01/10/2020

Corrective Action

Corrective action

Immediate Correction

Immediate action

Root Cause

Root cause

Preventative Action

Preventative action

Evidence

Close

Complete

Awaiting Supplier Action

Further Detail Required

Step 2: Now add the additional information & select **Confirm Request**

Audit Item

Additional information request

Cancel

Confirm Request

Step 3: The status now reverts to **Further Detail Required**

<input type="checkbox"/>	01/10/2020	Steve Jones	Apo Fruit (EC 323232)	Further Detail Required	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	15/10/2020 17:00:00	01/10/2020 00:00:00	Further Detail Required	
--------------------------	------------	-------------	-----------------------	-------------------------	-------	-------	--	---------------------	---------------------	-------------------------	--

Step 4: If you select the audit item again you can now see the additional information requested

Audit Item

Attached Files/Images

Comments

Responses

Additional Information Requested

Requested Date	Requested Information	Requested By
01/10/2020	Additional information request	Steve Jones

Close

✓ Complete

Awaiting Supplier Action

Step 5: The supplier will get another notification to add further details and these will come back to you the same way as above to Approve/Complete. Now select **Complete**

Audit Item

Attached Files/Images

Comments

Responses

Additional Information Requested

Requested Date	Requested Information	Requested By
01/10/2020	Additional information request	Steve Jones

Close

✓ Complete

Awaiting Supplier Action

Step 6: The status now reverts to **Completed**

<input type="checkbox"/>	01/10/2020	Steve Jones	Apo Fruit (EC 323232)	Completed	Major	HACCP	HACCP shall have senior management commitment and shall be implemented through the company's quality management system	15/10/2020 17:00:00	01/10/2020 00:00:00	Completed	
--------------------------	------------	-------------	-----------------------	-----------	-------	-------	--	---------------------	---------------------	-----------	--

4. UPDATE AN AUDIT

You may use this before an audit is completed and confirmed. You may need to change an answer or some part of the details for a particular reason.

Step 1: Sign in, go to the supplier audit manager, then select the edit button beside the audit and select **Update Audit**

Supplier Audit Manager

Company Audits | Audit Items | Received Customer Audits | Activity Overview | Reports | Admin

Date (From) [] Date (To) [] Status: All | Audit Site: All | Auditor: All | Audit Type: All | Audit Score Rating: All | Supplier: All | Supplier Type: All | Supplier Sub Type: All | Lead Technical Manager: All | Custom 2: All | Internal Review Status: All | Sort: Audit Created | Search: []

+ Add New Audit | Delete Selected | Export...

	Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Custom 2	Score	Status
<input type="checkbox"/>	05/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1			0 - Grade AA (APPROVED)	In Progress

View | View Summary | **Update Audit** | Request Internal Review | Notify Team Members | Send PDF Report | Send | Send Reminder | Recall Audit | Audit Links | Reopen Audit | Mark as Complete

Step 2: Here you can go through the audit as you did earlier when completing it. Follow the steps above.

Supplier Audit Manager - Apo Fruit | Back

Audit Overview | Audit Data Form | Checklists (1) | Audit Items (2)

Audit Details | Update Audit

Site	Group	Audit Type	Supplier Audit 1
Auditor	Steve Jones	Checklists	Supplier Audit Checklist
Supplier	Apo Fruit	Audit Score	0 - Grade AA (APPROVED)
Audit Date	05/10/2020		
Attendees			

File Attachments

Choose file | No file chosen

Choose file | No file chosen

Choose file | No file chosen

Choose file | No file chosen

Choose file | No file chosen

Choose file | No file chosen

Select Language

Save | Save & Exit

5. REQUEST AN INTERNAL REVIEW

If you have this feature turned on in the admin section, you can request an internal review with a colleague.

Step 1: When in the Supplier audit manager, select the audit then select **Request Internal Review**

The screenshot shows the 'Supplier Audit Manager' interface. At the top, there are navigation tabs: 'Company Audits', 'Audit Items', 'Received Customer Audits', 'Activity Overview', 'Reports', and 'Admin'. Below these are various filters for Date (From/To), Status, Audit Score Rating, Audit Site, Auditor, Supplier, Supplier Type, Supplier Sub Type, Lead Technical Manager, and Internal Review Status. A table of audit items is displayed at the bottom. The first row of the table is highlighted, and a context menu is open over it, with 'Request Internal Review' highlighted in red.

	Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Custom 2	Score	Status
<input type="checkbox"/>	05/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1			0 - Grade AA (APPROVED)	In Progress

Step 2: Now select a reviewer and enter any comment if necessary. When done select **Request Review**

The screenshot shows the 'Request Internal Review' dialog box. It has a title bar with a close button. Below the title bar, there is a 'Select Reviewer' dropdown menu with 'Steve Jones' selected. Below that is an 'Include Message (Optional)' section with a text area containing 'Enter message...'. At the bottom right, there are two buttons: 'Cancel' and 'Request Review', with 'Request Review' highlighted in red.

Step 3: The status now reverts to **Requires Review**

<input type="checkbox"/>	05/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1			0 - Grade AA (APPROVED)	In Progress	Requires Review
--------------------------	------------	-------	-------------	-----------	-----------	-------------	-------	------------------	--	--	-------------------------	-------------	-----------------

5.1 APPROVE/CONFIRM AN INTERNAL REVIEW

Step 1: The approver will get a notification like this below, select the task

Home | Overall Compliancy | More ▾

Latest News « Previous Next »

It would require a 'monumental shift' for sustainability to top the corporate agenda
Significant commitments on issues like food waste or plastic pollution would suggest that sustainability is moving up the corporate priority list. However, with consumer sentiment sliding and upward pricing pressure on the horizon, it would require a "monumental shift" for sustainability to continue its ascent in the boardroom.

Experts weigh in on digestive health in Kerry Health and Nutrition Institute webinar
Gut health is becoming increasingly popular among consumers. In this wide-ranging health area, the gut-brain axis (GBA) is a key area of interest, along with the sort of probiotic bacteria that aid wider gut health, Dairy & Food Culture Technologies Consultant, Dr. Mary Ellen Sanders, tells NutritionInsight.

My Tasks 138 outstanding

- Steve Jones requested an internal review of an audit
- User 1 Abattoir responded to an Audit
- User 1 Abattoir responded to an Audit
- User 1 Abattoir responded to an Audit
- User 1 Abattoir responded to an Audit
- User 1 Abattoir responded to an Audit

[View All Tasks](#)

Or

or go to the Company Audits view in Supplier Audit Manager

<input type="checkbox"/>	05/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1		0 - Grade AA (APPROVED)	In Progress	Requires Review	Confirm
--------------------------	------------	-------	-------------	-----------	-----------	-------------	-------	------------------	--	-------------------------	-------------	-----------------	-------------------------

Step 2: Now view or review the audit by selecting **View**

Supplier Audit Manager

Company Audits | Audit Items | Received Customer Audits | Activity Overview | Reports | Admin

Date (From) Date (To)

Status

Audit Score Rating

Audit Site

Auditor

Audit Type

Custom 2

Supplier

Supplier Type

Lead Technical Manager

Internal Review Status

Supplier Associated Site

Supplier Sub Type

Sort

Search

[Add New Audit](#) [Delete Selected](#) [Export...](#)


	Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Custom 2	Score	Status	
<input type="checkbox"/>	05/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1			0 - Grade AA (APPROVED)	In Progress	View

View Summary
Update Audit
Request Internal Review
Notify Team Members
Send PDF Report
Send
Send Reminder
Recall Audit
Audit Links
Reopen Audit
Mark as Complete

Step 3: View audit in full and select **Back** when done

Back
Hide Updates History
Export to PDF

Audit Summary



Supplier	Apo Fruit	Previous Audit	View
Audit Type	Supplier Audit 1	Previous Audit Date	N/A
Auditor	Steve Jones	Previous Audit Items	1 (1 - Major)
Audit Date	05/10/2020	Previous Audit Outcome	
Audit Respond By Date	N/A	Previous Audit Score	0 - Grade AA (APPROVED)
Attendees			
Custom Field - Product Type			
Custom 2			
Audit Items	2 (2 - Minor)		
Audit Score	0 - Grade AA (APPROVED)		

Step 4: Then select **Confirm** on the audit

<input type="checkbox"/>	05/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1		0 - Grade AA (APPROVED)	In Progress	Requires Review	Confirm	
--------------------------	------------	-------	-------------	-----------	-----------	-------------	-------	------------------	--	-------------------------	-------------	-----------------	-------------------------	--

6. MARK AUDIT AS COMPLETE

Step 1: When you are happy and you want to mark the audit as fully complete select the audit the select **Mark as Complete**

The Audit has been successfully closed and marked as complete.

Date (From)
Date (To)
Status
Audit Score Rating

Audit Site
Auditor
Audit Type
Custom 2

Supplier
Supplier Type
Lead Technical Manager
Internal Review Status

Supplier Associated Site
Supplier Sub Type
Sort
Search

Add New Audit
Delete Selected
Export

	Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Custom 2	Score	Status	Action
<input type="checkbox"/>	05/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1			0 - Grade AA (APPROVED)	Complete	View
<input type="checkbox"/>	01/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1	Corn	1	0 - Grade AA (APPROVED)	Requires Review	Mark as Complete

Step 2: Now select **Ok**

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Are you sure you want to mark this audit as complete?

OK

Cancel

Step 3: The audit is now fully complete

<input type="checkbox"/>	05/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1			0 - Grade AA (APPROVED)	Completed	Confirmed	
--------------------------	------------	-------	-------------	-----------	-----------	-------------	-------	------------------	--	--	-------------------------	-----------	-----------	--

7. NOTIFY TEAM MEMBERS

You can notify team members of an audit

Step 1: Select the audit you want to notify your colleagues about, then select **Notify Team Members**

Supplier Audit Manager

Company Audits | Audit Items | Received Customer Audits | Activity Overview | Reports | Admin

The Audit has been successfully closed and marked as complete.

Date (From)
 Date (To)
 Status
 Audit Score Rating

Audit Site
 Auditor
 Audit Type
 Custom 2

Supplier
 Supplier Type
 Lead Technical Manager
 Internal Review Status

Supplier Associated Site
 Supplier Sub Type
 Sort
 Search

Add New Audit | Delete Selected | Export...

	Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Custom 2	Score	Status
<input type="checkbox"/>	05/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1			0 - Grade AA (APPROVED)	Completed

View
 View Summary
 Update Audit
 Request Internal Review
Notify Team Members
 Send PDF Report
 Edit Share Visibility
 Send Reminder
 Recall Audit
 Audit Links
 Reopen Audit
 Mark as Complete

Step 2: Select the person (s) to notify, add a comment if necessary. When done select **Notify Team Members**

Notify Team Members

Company Users

Include Message (Optional)

Search team members...

	Name	Site
<input type="checkbox"/>	Commercial	Group
<input type="checkbox"/>	HR	Group
<input type="checkbox"/>	Maintenance	Group
<input type="checkbox"/>	Night Shift	Group
<input type="checkbox"/>	Production Team	Group
<input type="checkbox"/>	Quality	Group
<input type="checkbox"/>	Technical	Group
<input type="checkbox"/>	Eugene Delacroix	Group
<input checked="" type="checkbox"/>	Eric Knowles	Group
<input type="checkbox"/>		

Cancel

Notify Team Members

Step 3: You will see this notification.

Your selected team members have been emailed.

8. SEND PDF REPORT

You can send a PDF report of the audit to someone outside the business

Step 1: Select the audit you want to send, then select the Send Pdf Report

The screenshot shows the 'Supplier Audit Manager' interface. At the top, there are navigation tabs: 'Company Audits', 'Audit Items', 'Received Customer Audits', 'Activity Overview', 'Reports', and 'Admin'. Below these are various filters for Date (From/To), Status, Audit Score Rating, Audit Site, Auditor, Audit Type, Supplier, Supplier Type, Lead Technical Manager, Internal Review Status, Supplier Associated Site, Supplier Sub Type, Sort, and a Search bar. A dropdown menu is open on the right, showing options like 'View', 'View Summary', 'Update Audit', 'Request Internal Review', 'Notify Team Members', 'Send PDF Report' (highlighted with a red box), 'Edit Share Visibility', 'Send Reminder', 'Recall Audit', 'Audit Links', 'Reopen Audit', and 'Mark as Complete'. Below the filters is a table with columns: Audit Date, Audit Site, Auditor, Supplier, Factory Code, Lead Technical Manager, Supplier Type, Audit Type, Custom Field - Product Type, Custom 2, Score, and Status. The first row of data shows an audit from 05/10/2020 for 'Group' by 'Steve Jones' at 'Apo Fruit' (Factory Code: EC 323232) with a score of '0 - Grade AA (APPROVED)'.

Step 2: Add the email address any comments then select **Send**

The screenshot shows the 'Send PDF Report' dialog box. It has a title bar with a close button. The 'Email Address' field contains 'user@user.com'. The 'Comments/Notes' field has a placeholder 'Add comment'. There is a 'Copy' section with a checkbox 'Send copy to me' which is currently unchecked. At the bottom right, there are two buttons: 'Cancel' and 'Send' (highlighted with a red box).

Step 3: The PDF report will be sent within the email.

9. EXPORT FULL AUDIT TABLE TO PDF

You can export the full audit table to PDF

Step 1: Sign in go the supplier audit manager, then select **Export** then select **to PDF**. The PDF then downloads

10.EXPORT FULL AUDIT TABLE TO EXCEL

You can export the full audit table to Excel

Step 1: Sign in go the supplier audit manager, then select **Export** then select **to Excel**. The Excel file then downloads

11.RECALL AUDIT

If you need to recall an audit for any reason you can do so here

Step 1: Sign in, go to the supplier audit manager then select the audit you want to recall, then select **Recall Audit**

[Add New Audit](#)
[Delete Selected](#)
[Export...](#)

Viewing 15 results | Page 1 of 1

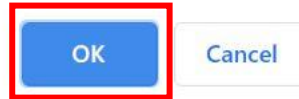
<input type="checkbox"/>	Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Custom 2	Score	Status	Internal Review Status
<input type="checkbox"/>	05/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1			0 - Grade AA (APPROVED)	Completed	
<input type="checkbox"/>	01/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1	Corn	1	0 - Grade AA (APPROVED)	Completed	
<input type="checkbox"/>	01/10/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Supplier Audit 1	Corn		0 - Grade AA (APPROVED)	Awaiting Response	
<input type="checkbox"/>	09/09/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Cold Storage			0 - Grade AA (APPROVED)	In Progress	
<input type="checkbox"/>	09/09/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Abattoir & Boning Room Audit			0 - Grade AA (APPROVED)	In Progress	
<input type="checkbox"/>	28/01/2020	Group	Steve Jones	Internal				Abattoir & Boning Room Audit			0 - Grade AA (APPROVED)	In Progress	

[View](#)
[View Summary](#)
[Update Audit](#)
[Request Internal Review](#)
[Notify Team Members](#)
[Send PDF Report](#)
[Edit Share Visibility](#)
[Send Reminder](#)
[Recall Audit](#)
[Audit Links](#)
[Reopen Audit](#)
[Mark as Complete](#)

Step 2: Now select **Ok**

demo.foodsconnected.com says

Are you sure you would like to recall this Audit?



Step 3: The audit has now been recalled. You will see this notification. The status now reverts back to **In Progress**

The selected Audit has been successfully recalled.

<input type="checkbox"/>	01/10/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Supplier Audit 1	Corn		0 - Grade AA (APPROVED)	In Progress	Not Applicable	
--------------------------	------------	-------	-------------	---------------	-----------	-------------	-------	------------------	------	--	-------------------------	-------------	----------------	--

12. REOPEN AUDIT

If an audit has been closed and confirmed, you do have the option to open it again to edit and send back to your supplier.

Step 1: Sign in, go to the supplier audit manager then select the audit you want to Reopen, then select **Reopen Audit**

<input type="checkbox"/>	Audit Date	Audit Site	Auditor	Supplier	Factory Code	Lead Technical Manager	Supplier Type	Audit Type	Custom Field - Product Type	Custom 2	Score	Status	Internal Review Status	
<input type="checkbox"/>	05/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1			0 - Grade AA (APPROVED)	Completed	Confirmed	
<input type="checkbox"/>	01/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1	Corn	1	0 - Grade AA (APPROVED)	Completed		
<input type="checkbox"/>	01/10/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Supplier Audit 1	Corn		0 - Grade AA (APPROVED)	In Progress		
<input type="checkbox"/>	09/09/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Cold Storage			0 - Grade AA (APPROVED)	In Progress		
<input type="checkbox"/>	09/09/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Abattoir & Boning Room Audit			0 - Grade AA (APPROVED)	In Progress		
<input type="checkbox"/>	28/01/2020	Group	Steve Jones	Internal				Abattoir & Boning Room Audit			0 - Grade AA (APPROVED)	In Progress		
<input type="checkbox"/>	18/08/2020	Group	Steve Jones	Veg Supplier	EC 161616	Steve Jones	Vegetables	Supplier Visit Audit			1 - Grade AA (APPROVED)	In Progress		

- View
- View Summary
- Update Audit
- Request Internal Review
- Notify Team Members
- Send PDF Report
- Edit Share Visibility**
- Send Reminder
- Recall Audit
- Audit Links
- Reopen Audit**
- Mark as Complete

Step 2: The audit has been reopened. You will see this notification and the status reverts to **Requires your Action**, were you are back to the steps above to complete and send

The Audit has been successfully reopened.

<input type="checkbox"/>	01/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1	Corn	1	0 - Grade AA (APPROVED)	Requires Action	Not Applicable	
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13. MANAGING ACTIVITY SUBSCRIPTIONS

This functionality allows the lead technical contact to receive notifications about actions that have occurred in the Audit Manager tool. Multiple subscriptions can be added.

Step 1: Navigate to the *Activity Overview* tab

Step 2: Select the **Activity Subscriptions** button

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits Supplier Provided Audits **Activity Overview** Reports Admin

Action Between:

Site:

Supplier:

Supplier Type:

Action Type:

Action By:

Activity Subscriptions

Step 3: Select the terms required for the notifications using the dropdown menus, note that a user can select multiple at each dropdown

Supplier Audit Manager - User Activity Subscriptions - Admin Admin

[Back to Activity Overview](#)

Timespan: ☒ Daily ☐ Weekly

Time:

Action Type:

Action By:

Supplier Type:

Supplier:

Site:

Timescale	Time	Day	Site	Supplier	Supplier Type
You currently have no records...					

Select either 'Daily' or 'Weekly' and the time
e.g. Updated Details, Shared Audit, Deleted Audit, Responded

e.g. A specific user or selection of users

Options here will show based on the Supplier Types set up in Supplier Manager

e.g. A specific supplier or selection of suppliers

e.g. A specific site or selection of sites

Step 4: Select the **Add Subscription** button

Supplier Audit Manager - User Activity Subscriptions - Admin Admin

Timespan	<input checked="" type="radio"/> Daily <input type="radio"/> Weekly
Time	09:00
Action Type	Responded ▾
Action By	All ▾
Supplier Type	All ▾
Supplier	All ▾
Site	All ▾

[Add Subscription](#)

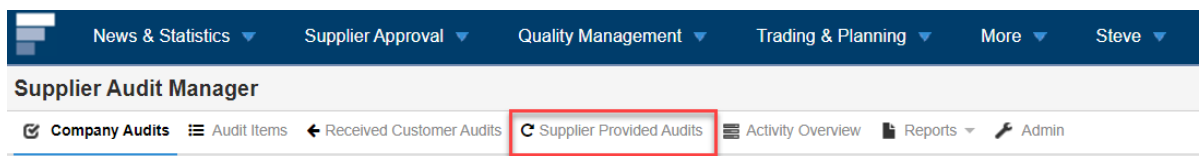
The record will show as below, this can be amended or updated using the **Update** button

Timescale	Time	Day	Site	Supplier	Supplier Type	Action By	Action Type	
Daily	09:00	N/A	All	All	All	All	Responded,	Update

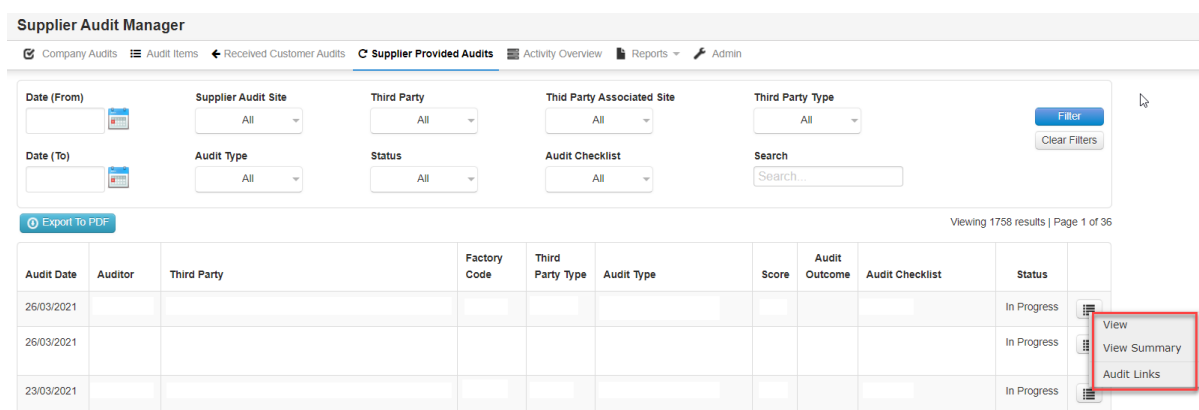
14. SUPPLIER PROVIDED AUDITS

14.1 VIEW AUDITS IN PROGRESS

Step 1: From 'Company Audits' view select the **Supplier Provided Audits** tab.



Step 2: The view of audits will show as below, this can be filtered using the options at the top of the screen to assist finding a specific record (if required). Select the menu button for the audit you would like to view and then select **View** from the options presented.



14.2 FINALISING COMPLETED AUDITS

The function of finalising Supplier Provided Audits can be switched on in the Admin settings, once it is enabled the following steps can be carried out.

Note – this can only be done once an audit has the status of being 'Completed'

Step 1: Select the menu button beside the audit you want to finalise. Select the **Finalise** option from this menu.

Supplier Audit Manager

Company Audits Audit Items Received Customer Audits **Supplier Provided Audits** Activity Overview Reports Admin

Date (From) Supplier Audit Site Third Party Thid Party Associated Site Third Party Type
 Date (To) Audit Type Status Audit Checklist Search
 Filter Clear Filters

Export To PDF Viewing 1259 results | Page 1 of 51

Audit Date	Auditor	Third Party	Factory Code	Third Party Type	Audit Type	Score	Audit Outcome	Audit Checklist	Status	
05/02/2021									Completed	View
04/02/2021									Completed	View Summary
03/02/2021									Completed	Finalise Audit Links

Step 2: A confirmation option will be presented, select the **OK** button to confirm the finalise step

t3wj7lmg.foodsconnected.com says

Are you sure you want to mark this audit as Finalised?

OK Cancel

The audit status will now move to showing as 'Finalised'.