TOOL USER GUIDE

SUPPLIER AUDIT MANAGER

CONTENTS

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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

Step 2: Then select *Admin*

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

1.1 TERMINOLOGY

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

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.

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*.

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

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*

ℹ 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.

ℹ 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	✎ 🗑

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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		✎ 🗑

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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		✎ 🗑

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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.

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.

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

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

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

Step 5: The options now look like this below

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Custom Category Setup   ✕

ℹ 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	
☐	1			1	0	✎
☐	2			2	1	✎
☐	3			3	1	✎
☐	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

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

Terminology		Display Name	Active	Display in Table	Display in Emails	Show in Received Table	Mandatory	
Visible Columns								
Outcomes & Scoring	Customisable Category 1 Field	Audit Outcome	☐	☐	☐	☐	☐	▤
Audit Types								
Audit Type Approvers	Customisable Category 2 Field	Custom 2	☑	☑	☐	☐	☑	▤
Custom Fields	Customisable Category 3 Field	Group 3	☐	☐	☐	☐	☐	▤
Schedules								

[Save Settings]

Custom Free-text fields:

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

Export To PDF		Display Name	Active	Display in Table	Display in Emails	Show in Received Table	Mandatory	
Internal Review								
Additional Settings	Text Field 1	Custom Field - Product Ty	☑	☐	☐	☐	☐	
Supplier Provided Visible Columns	Text Field 2	Text Field 2	☐	☐	☐	☐	☐	
	Text Field 3	Text Field 3	☐	☐	☐	☐	☐	

[Save Settings]

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Step 2: Select Edit Audit Categories

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

Step 4: And to edit select the edit button beside

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

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

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

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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	☑	☑	☐	☐	☑	
Text Field 2	Text Field 2	☐	☐	☐	☐	☐	
Text Field 3	Text Field 3	☐	☐	☐	☐	☐	

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

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	
☐	09/09/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Cold Storage			0 - Grade AA (APPROVED)	In Progress	☰
☐	09/09/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Abattoir & Boning Room Audit			0 - Grade AA (APPROVED)	In Progress	☰

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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

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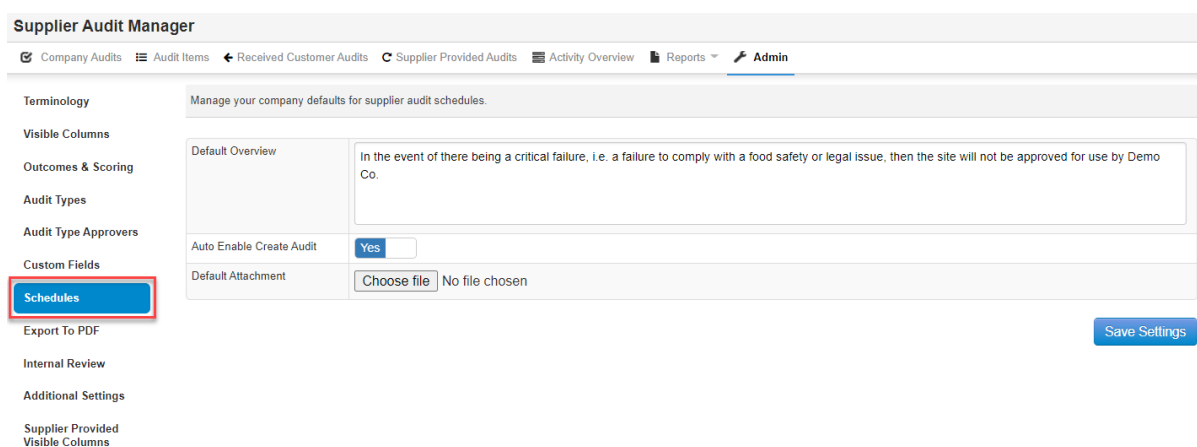
1.5 AUDIT SCHEDULE DEFAULT SETTINGS

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.

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

Step 3: When done select *Save.*

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.

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

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

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.

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

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.

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

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.

Step 2: Select *Add Approvers* button

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

Select the site the audit relates to

Select either the individual audit or leave as 'All'

Select either 'All Selected Users' or 'One of the Selected Users'

Select the User(s) for the approval

The view of this record will show as below

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

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

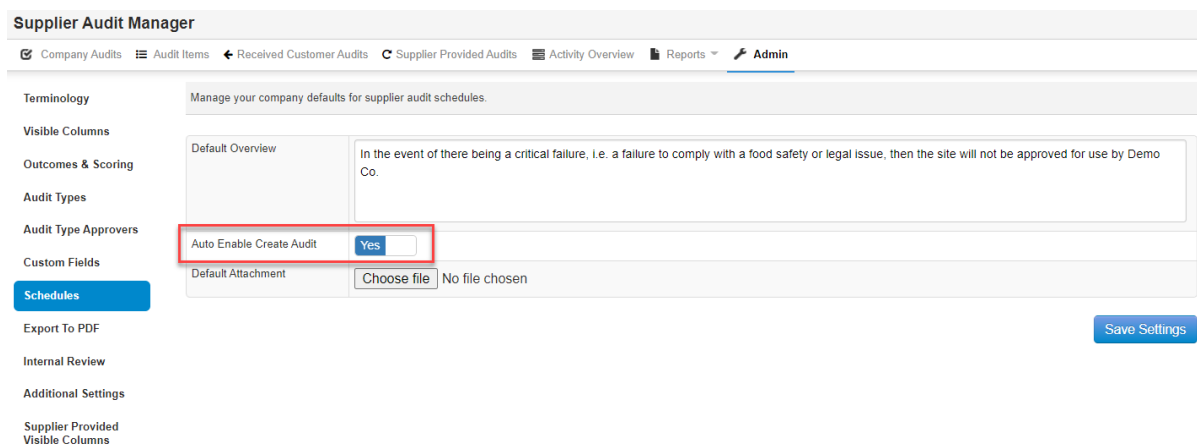Additional Settings

Supplier Provided Visible Columns

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

Audit Date	☑
Auditor	☑
Lead Technical Manager	☑
Third Party	☑
Factory Code	☑
Third Party Type	☑
Audit Type	☐
Audit Score	☐
Audit Outcome	☐
Audit Checklist	☐
Status	☑

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

Visible Columns

Outcomes & Scoring

Audit Types

Audit Type Approvers

Custom Fields

Schedules

Export To PDF

Internal Review

Additional Settings

Supplier Provided Visible Columns

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

Audit Date	☑
Auditor	☑
Lead Technical Manager	☑
Third Party	☑
Factory Code	☑
Third Party Type	☑
Audit Type	☐
Audit Score	☐
Audit Outcome	☐
Audit Checklist	☐
Status	☑

Save Settings

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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

☐	Site	Date	Audit Type	Locations	Outcomes	Supplier Type(s)	Scoring Enabled	Version	Status	In Use	
☐	Group	06/01/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	1	Approved	Yes	☰▾
☐	Group	15/11/2018	Cold Storage	No Locations	Minor, Major	Meat , Ingredients, Bakery, Dairy, Vegetables, Salt, Seafood, Fruit	Yes	1	Approved	Yes	☰▾
☐	Group	29/01/2021	Farm	No Locations	Minor, Major	Farm	Yes	1	Approved	Yes	☰▾
☐	Group	03/02/2021	Generic Meat Audit	7 Locations	Minor, Major	Meat	Yes	1	Approved	Yes	☰▾
☐	Group	15/11/2018	Ingredients	No Locations	Minor, Major	Ingredients	Yes	1	Approved	Yes	☰▾
☐	Group	18/08/2020	Packaging	No Locations	Minor, Major	Packaging	Yes	1	Approved	Yes	☰▾
☐	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	☰▾
☐	Group	06/01/2021	Supplier Visit Audit	No Locations	Minor, Major	All	Yes	1	Approved	Yes	☰▾

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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			

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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.

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

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.

2.1.3 ADD TYPES

Types are the questions or defined areas within the locations

Step 1: Select Types

Step 2: Select *Add New Type*

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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.

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

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.

2.1.5 ADD CATEGORIES

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

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

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

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

| ❶ Audit Type | ☰ Locations | ☰ Types | ☰ Categories | 💬 Pre-Defined Items Comments | ⊘ Checklists | 💬 Checklist Comments | ★ Score Ratings | ✔ Corrective Actions |

❶ Audit Item Category e.g. Major/Minor etc

⊕ Add New Category   ⇕ Reorder Categories

Category	Type	Points	Order		
Minor	• CCP Control	1	1	✎	🗑
Major	• CCP Control	10	2	✎	🗑

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

| ❶ Audit Type | ☰ Locations | ☰ Types | ☰ Categories | 💬 Pre-Defined Items Comments | ⊘ Checklists | 💬 Checklist Comments | ★ Score Ratings | ✔ Corrective Actions |

❶ Audit Item Category e.g. Major/Minor etc

⊕ Add New Category   ⇕ Reorder Categories

Category	Type	Points	Order		
Minor	• CCP Control	1	1	✎	🗑
Major	• CCP Control	10	2	✎	🗑

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
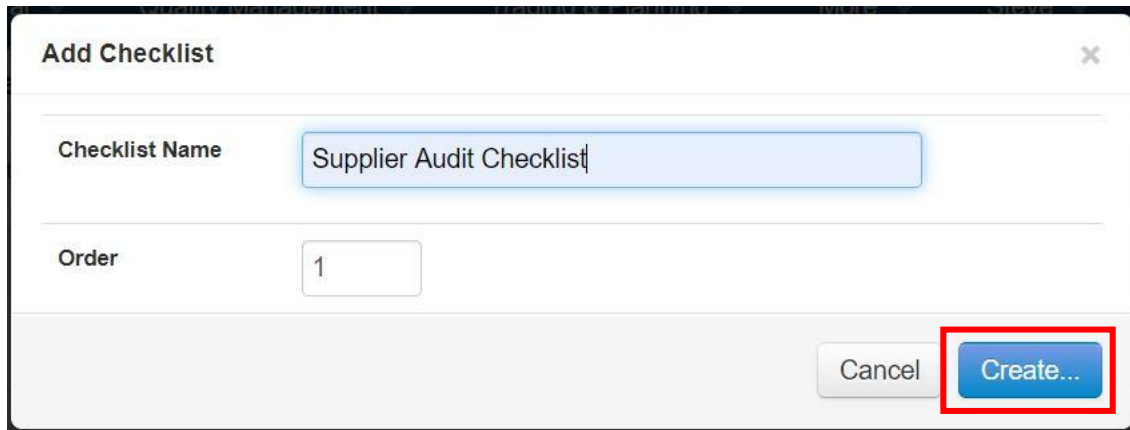
| ❶ Audit Type | ☰ Locations | ☰ Types | ☰ Categories | 💬 Pre-Defined Items Comments | ⊘ Checklists | 💬 Checklist Comments | ★ Score Ratings | ✔ Corrective Actions |

❶ Manage Audit Checklists

⊕ Add New Checklist

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

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

Add Checklist   ✕
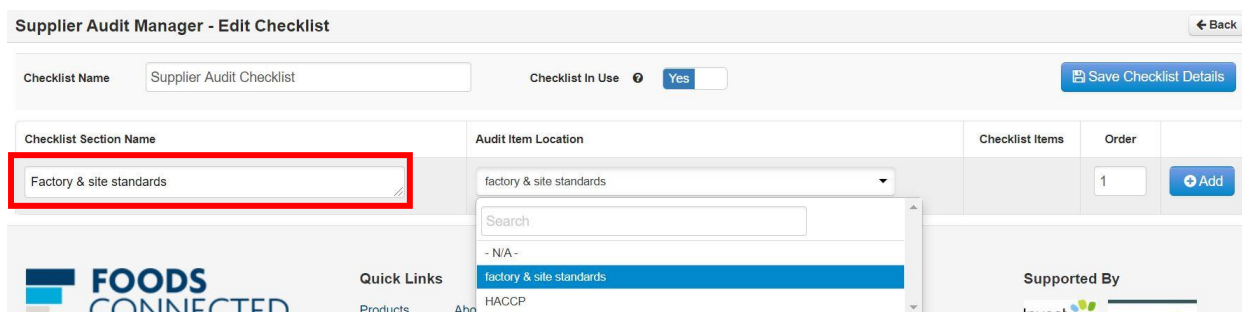
| Checklist Name | Supplier Audit Checklist |
| Order | 1 |

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.

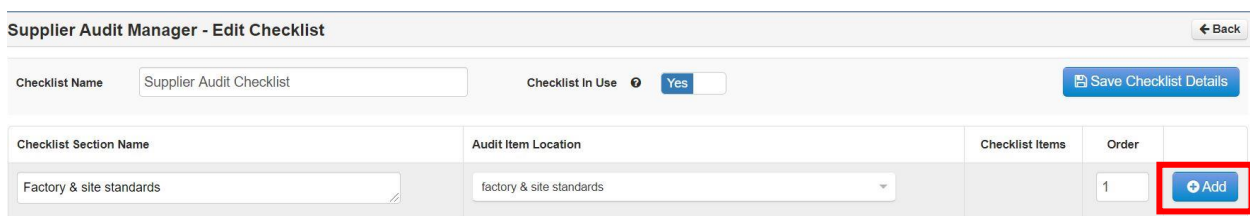**Supplier Audit Manager - Edit Checklist**   ← Back

Checklist Name   Supplier Audit Checklist   Checklist In Use ? Yes   🖫 Save Checklist Details

Checklist Section Name	Audit Item Location	Checklist Items	Order	
Factory & site standards	factory & site standards ▾		1	⊕ Add

Search
- N/A -
factory & site standards
HACCP

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                        Products   Abo

Step 4: Select *Add* when done.

Supplier Audit Manager - Edit Checklist   ← Back

Checklist Name   Supplier Audit Checklist   Checklist In Use ? Yes   🖫 Save Checklist Details

Checklist Section Name	Audit Item Location	Checklist Items	Order	
Factory & site standards	factory & site standards ▾		1	⊕ Add

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

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

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

2.1.8 EDIT CHECKLIST (AND DELETE SECTIONS IN A CHECKLIST)

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

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

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.

2.1.10 DELETE A FULL CHECKLIST

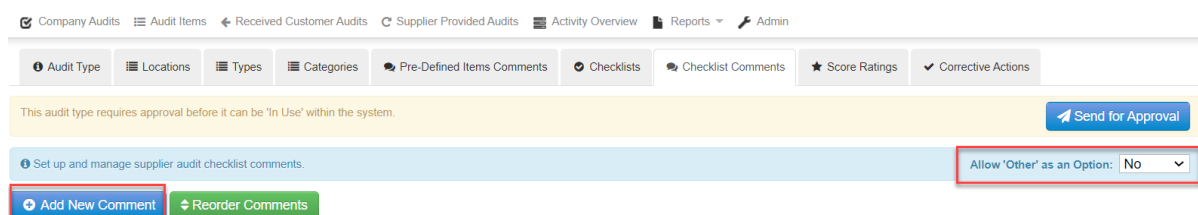**Step 1:** To delete a full checklist, in the admin section under audit types scroll to Checklists, then select *Delete*
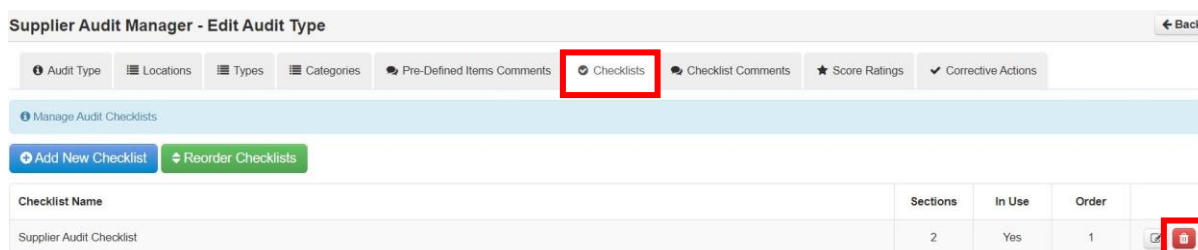
2.1.11 USE/ADD CHECKLIST COMMENTS

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? ❶	Yes
Audit Item Category	Minor ⌄
Open Comment Box? ❶	Yes
Open Corrective Action Additional Info Box? ❶	Yes

Cancel   **Save**

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

❶ 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

❶ 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	✎	🗑

2.1.12 EDIT 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.

❶ 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

❶ 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	✎	🗑

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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*

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.

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

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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.

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

Step 2: When done select *Save Actions*

2.1.16EDIT OR DESELECT OPTIONS IN CORRECTIVE ACTIONS

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

Step 2: When done select *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

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

Step 3: Your duplicated copy will look like this below

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

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)

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

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	
Visible Columns	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.

➕ Add New Type   🗑 Delete Selected

	Site	Date	Audit Type	Locations	Outcomes	Supplier Type(s)	Scoring Enabled	Version	Status	In Use	
☐	Group	09/02/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	2	Pending Approval	No	☰▾
☐	Group	06/01/2021	Abattoir & Boning Room Audit	No Locations	Minor, Major	Abattoirs	Yes	1	Approved	Yes	☰▾

Sidebar items:
- Terminology
- Visible Columns
- Outcomes & Scoring
- **Audit Types**
- Audit Type Approvers
- Custom Fields
- Schedules
- Export To PDF

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 Proscuitto - Gate 4.1 - Post Validation of Product (4 weeks)'

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

🕐 You have been asked to complete workflow step 'NPD Proscuitto - 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**

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

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

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)

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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

Step 2: Select *Add New Section*

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

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

Edit Options
⊕ Add New ▾   ⇕ Reorder ▾

Supplier Audit 1 - Form Preview

Quick Add Section Fields

☑ Audit Reason   ⚙   C ▾

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 ▾	☐	☐
	-- Please Select -- ▾	☐	☐
	-- Please Select -- ▾	☐	☐
	-- Please Select -- ▾	☐	☐
	-- Please Select -- ▾	☐	☐
	-- Please Select -- ▾	☐	☐
	-- Please Select -- ▾	☐	☐
	-- Please Select -- ▾	☐	☐
	-- Please Select -- ▾	☐	☐
	-- Please Select -- ▾	☐	☐

Cancel   **Update Section**

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

Supplier Audit Manager - Update Form   ← Back

Edit Options
⊕ Add New ▾   ⇕ Reorder ▾

Supplier Audit 1 - Form Preview

☑ Audit Reason   ⊕   C ▾

☑ Reason   --Please Select--   ▾

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

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

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.

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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

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

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 ten 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	☐ Meat
	☐ Ingredients

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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*

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

Audit Details

Site	Demo Co Group (Group)
Audit Type	Please note changing the Audit Type of an existing audit, even to a newer version, will result in a loss of data
	Abattoir & Boning Room Audit
Checklists	Please note changing the Checklists of an existing audit will result in a loss of data
	☐ Abattoir & Boning Room Audit
Auditor	Steve Jones
Supplier	○ Internal Audit
	○ Abattoir 1
Confidential Share ⓘ	No
Audit Date	04/02/2021 📅
Attendees	
Custom Field - Product Type*	
Custom 2	-- Please Select --

Close   Save

Select your site that the audit relates too.

Select the Audit Type

Select the checklist if you want to use it

Select the supplier from the list

Select the audit date

Add any attendees for your records

If you have custom fields activated, you can add the info here

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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.

Pic above

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

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

Step 6: Now select the *Checklists* tab

Supplier Audit Manager   ← Back

| | | | | | Save ▾ |

Section	Check Details	Checked	Category		Comment
1. Supplier Audit Checklist					
Factory & site standards	CCP Control	☐	- Select - ⌄		
HACCP	HACCP	☐	- 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	☑	Compliant ⌄		
HACCP	HACCP	☑	Non-Compliant ⌄ - Select - Non-Compliant Compliant Other		Enter comment here

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	☑	Compliant ⌄		
HACCP	HACCP	☑	Non-Compliant ⌄ - Select - Non-Compliant Compliant Other		Enter comment here

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	☑	Compliant ⌄		
HACCP	HACCP	☑	Non-Compliant ⌄		Enter comment here

Save

Step 10: Select the *Audit Items* tab

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

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*

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

3.1.2 EDITING AN AUDIT ITEM

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

Step 2: To edit the details select the edit button

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*

3.1.3 DELETE AN AUDIT ITEM

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

Step 2: To edit the details select the edit button

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

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.

3.1.5 DELETE A FULL AUDIT

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

Step 2: The full audit is now deleted.

3.2 COMPLETING AN AUDIT ON APP

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

Step 2: Then choose settings

Settings

⚙ Settings

↪ Logout

✕ View ▾ Files & Extras ▾

Team Tasks

...udits

Supplier Checks

...roduct ...hecks

Internal Checks

...rkflows

...ceability ...hecks

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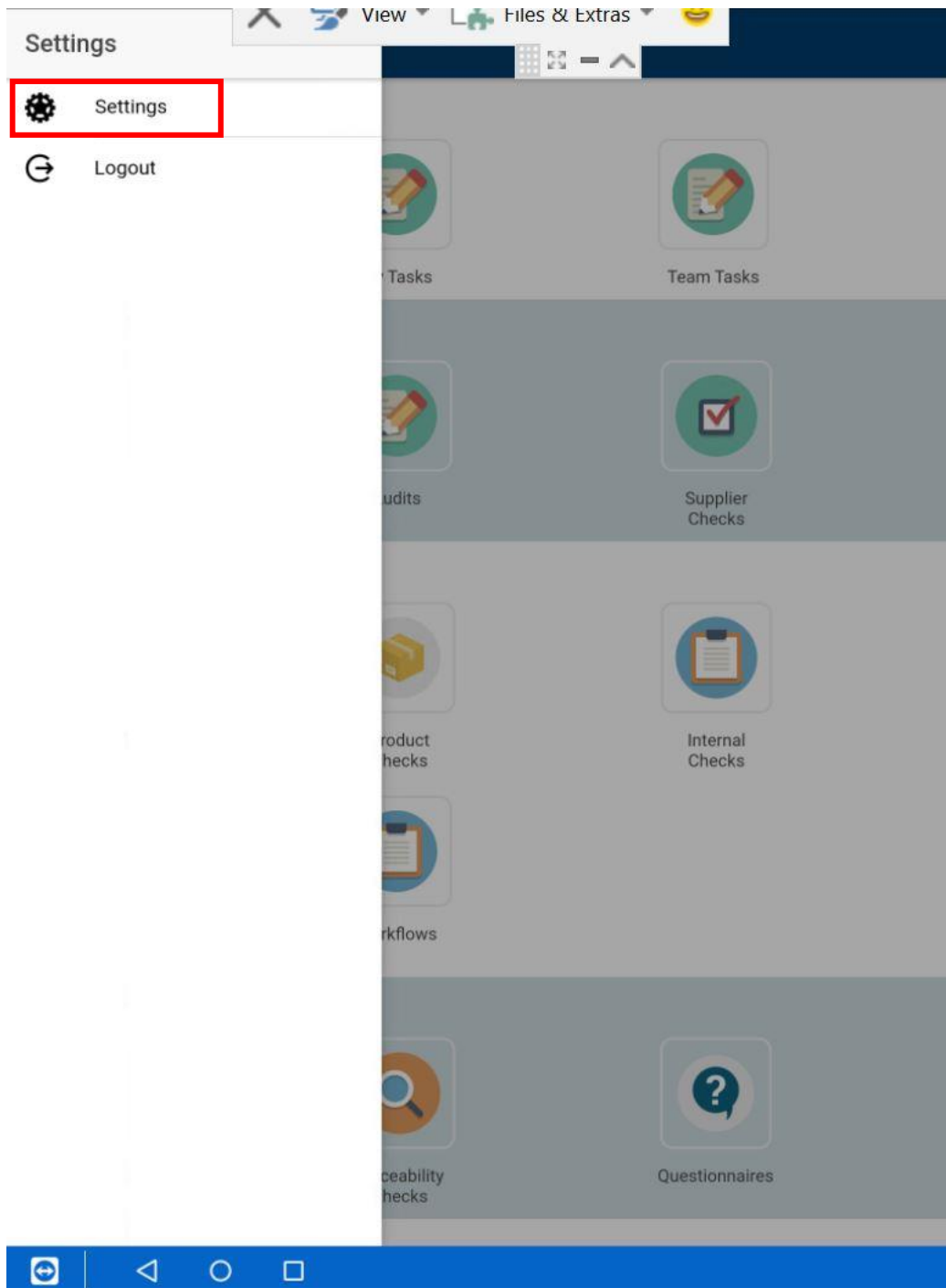
Step 3: Now download your suppliers to the app/tablet by selecting *Suppliers*

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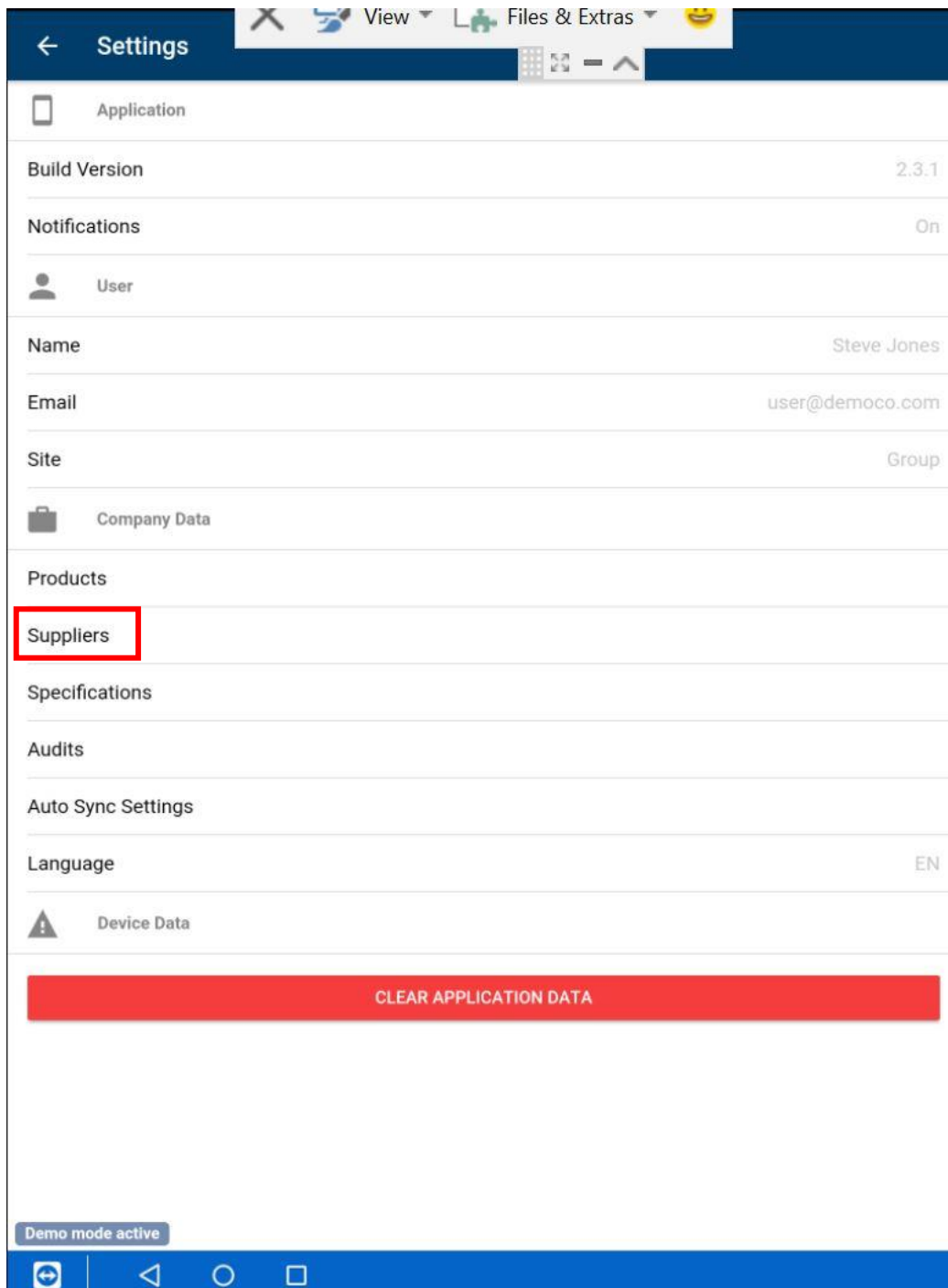
Step 4: Now select the **Cloud** icon to download your supplier list

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Suppliers

Tap the cloud download icon to sync suppliers

Demo mode active
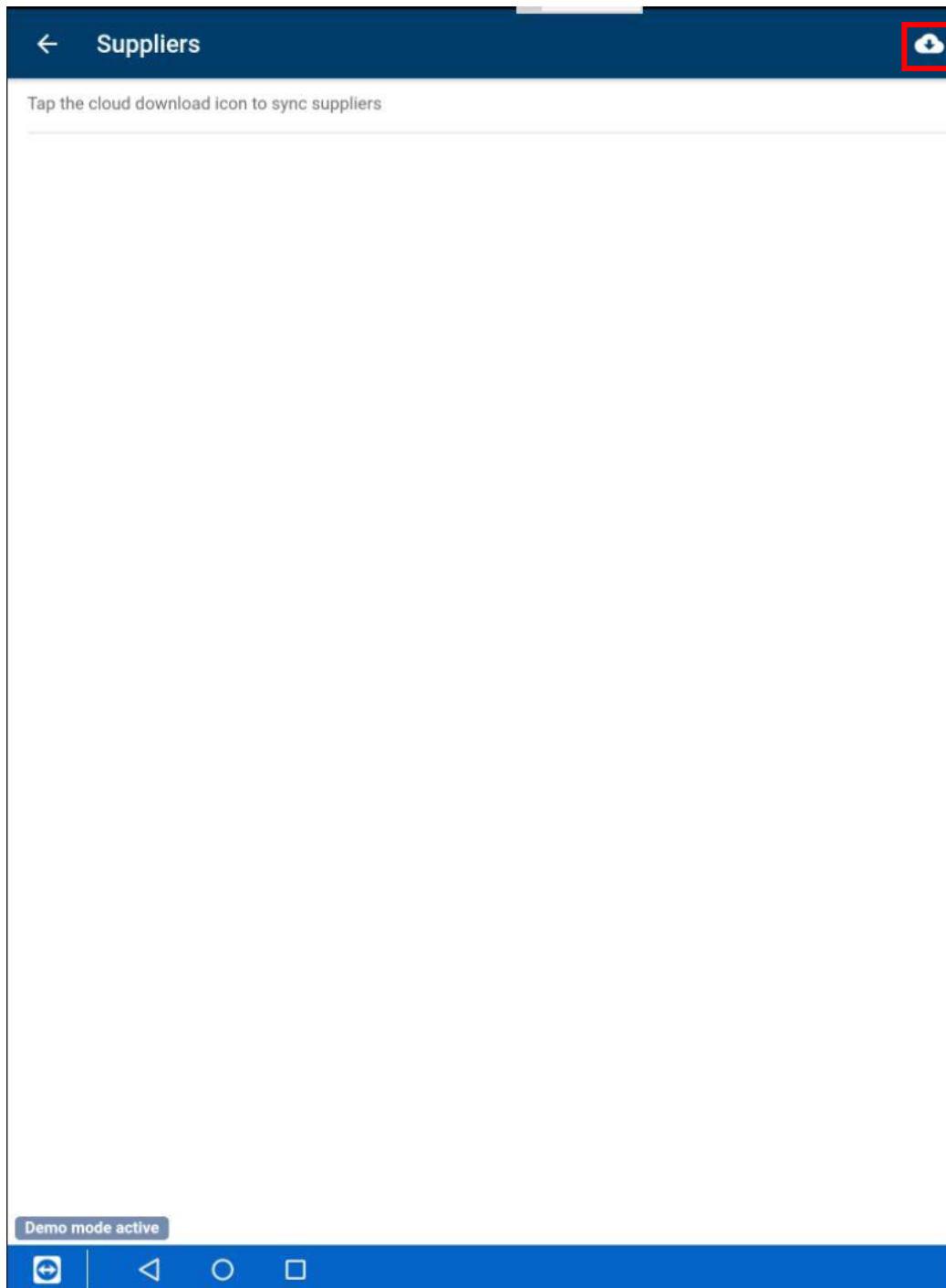
Step 5: The suppliers have now downloaded

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Step 6: Now select back

Step 7: Select back again

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

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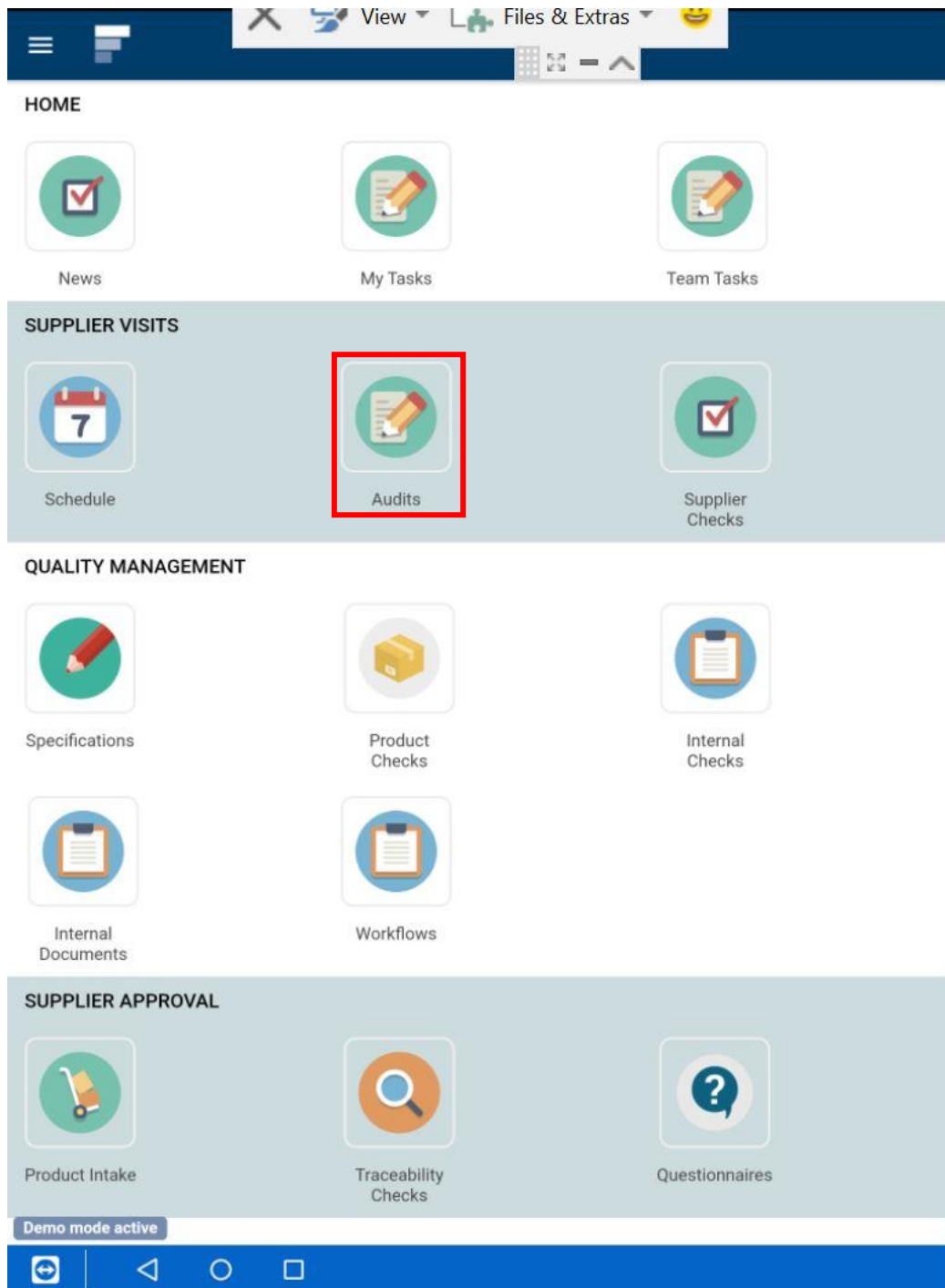
Step 9: Now download your templates to the App/tablet by select the Cloud icon

FOODS CONNECTED
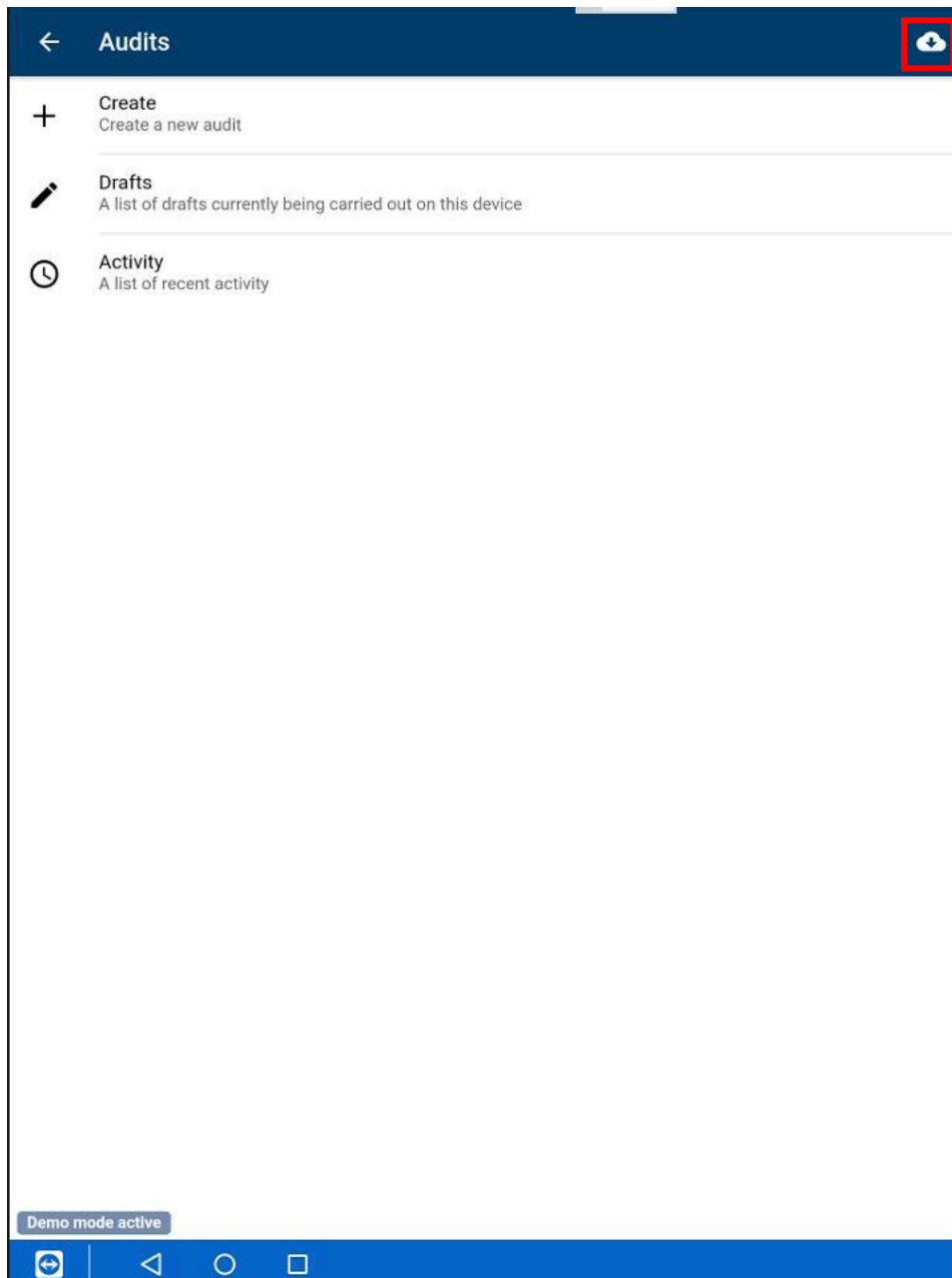
Step 10: When they download ok you'll see this notification
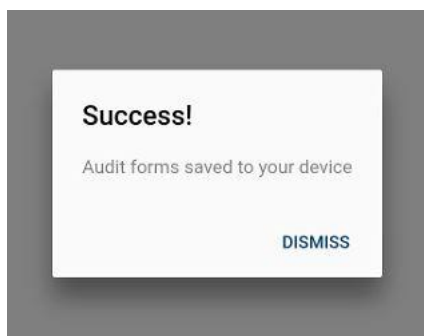
Step 11: Now select *Create*
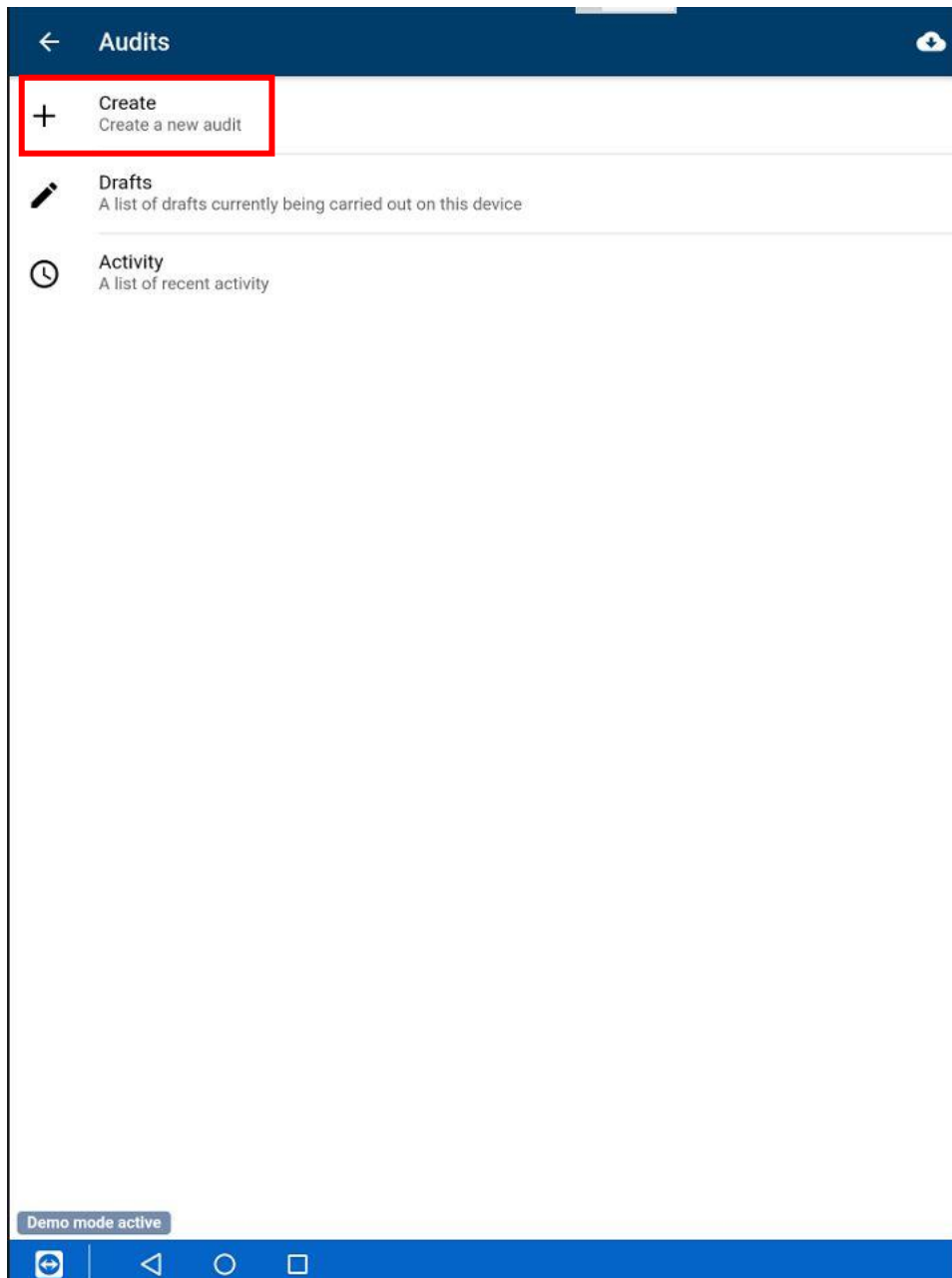
Step 12: Select the details below, taking care to select your checklist too.

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Step 13: Select *Save* when done

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

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**

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

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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.

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

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

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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*

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

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

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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

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

Step 2: Select the details below

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

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 🕐

Cancel Share

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

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

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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

Or

Go to *Supplier Approval*, *Received Audits*

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):	Rec'd From (Company):	Status:		Filter
	📅	All ▾	All ▾	All ▾		Clear Filters
	📅	Shared With (User):	Rec'd From (Person):			
		All ▾	All ▾			

🗑 Delete Selected   Viewing 1 results | Page 1 of 1

	Audit Date	Respond By	Site	Auditor	Shared With	Status	
☐	01/10/2020	15/10/2020	Apo Fruit	Steve Jones Demo Co	User 1 Abattoir - Apo Fruit	Requires Action	Full Report Summary 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):	Rec'd From (Company):	Status:		Filter
	📅	All ▾	All ▾	All ▾		Clear Filters
	📅	Shared With (User):	Rec'd From (Person):			
		All ▾	All ▾			

🗑 Delete Selected   Viewing 1 results | Page 1 of 1

	Audit Date	Respond By	Site	Auditor	Shared With	Status	
☐	01/10/2020	15/10/2020	Apo Fruit	Steve Jones Demo Co	User 1 Abattoir - Apo Fruit	Requires Action	Full Report Summary Respond

Step 4: View full audit

Back	Hide Updates History	Export to PDF

Audit Summary

COMPANY NAME
Slogan Here

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)

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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	✔	Compliant
HACCP	HACCP	✔	Non-Compliant - Issue

Step 5: Select *back* when done

Back | Hide Updates History | Export to PDF

Audit Summary

COMPANY NAME

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)

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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**

Step 2: Select Export to PDF

3.4.3 RESPOND TO THE AUDIT ITEMS & NCS

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

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

Step 3: Review and select *Back* when done

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		ⓘ
1	Major	HACCP shall have senior management commitment and shall be implemented	HACCP	Requires Response	Issue		15/10/2020	No	Click to add Response ⊕ Add Response	

Select Language

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

Step 7: Your added response looks like this below

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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		✎

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**

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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

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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*

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

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

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

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

Step 3: Add further detail here select *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				☑

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

Step 6: Include message

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

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**

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

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*

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

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

Or

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

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)		Audit Site		Supplier		Supplier Associated Site	
		All		All		All	

Date (To)	Auditor	Supplier Type	Supplier Sub Type
	All	All	All

Status	Audit Type	Lead Technical Manager	Sort
All	All	All	Audit Created

Audit Score Rating	Custom 2	Internal Review Status	Search
All	All	All	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 |

➕ 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	Statu	Requi Action
☐	01/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1	Corn	1	0 - Grade AA (APPROVED)	Requ Action	

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Step 2: Select Export to PDF

3.7.3 RESPOND TO THE AUDIT ITEMS OR NCS

Step 1: Now select the *Audit Items* tab

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

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

3.7.3.1   AWAITING SUPPLIER ACTION RESPONSE

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

Step 2: The status reverts to this below

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

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*

	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	🔍

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3.7.3.2   FURTHER DETAIL REQUIRED RESPONSE

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

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

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

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

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*

Step 6: The status now reverts to *Completed*

	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*

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

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*

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

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

5.1 APPROVE/CONFIRM AN INTERNAL REVIEW

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

Or

or go to the Company Audits view in Supplier Audit Manager

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

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

Step 4: Then select *Confirm* on the audit

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*

Step 2: Now select *Ok*

demo.foodsconnected.com says

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

OK   Cancel

Step 3: The audit is now fully complete

| | 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*

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

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

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

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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*

Step 2: Now select *Ok*

demo.foodsconnected.com says

Are you sure you would like to recall this Audit?

OK   Cancel

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.

| | 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*

	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	
☐	05/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1			0 - Grade AA (APPROVED)	Completed	Confirmed	☰
☐	01/10/2020	Group	Steve Jones	Apo Fruit	EC 323232	Steve Jones	Fruit	Supplier Audit 1	Corn	1	0 - Grade AA (APPROVED)	Comple	View	
☐	01/10/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Supplier Audit 1	Corn		0 - Grade AA (APPROVED)	In Progr	View Summary	
☐	09/09/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Cold Storage			0 - Grade AA (APPROVED)	In Progr	Update Audit	
☐	09/09/2020	Group	Steve Jones	Acorn Produce	EC 343434	Steve Jones	Fruit	Abattoir & Boning Room Audit			0 - Grade AA (APPROVED)	In Progr	Request Internal Review / Notify Team Members / Send PDF Report	
☐	28/01/2020	Group	Steve Jones	Internal				Abattoir & Boning Room Audit			0 - Grade AA (APPROVED)	In Progr	**Edit Share Visibility** / Send Reminder / Recall Audit	
☐	18/08/2020	Group	Steve Jones	Veg Supplier	EC 161616	Steve Jones	Vegetables	Supplier Visit Audit			1 - Grade AA (APPROVED)	In Progr	Audit Links / **Reopen Audit** / Mark as Complete	

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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.

| | 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 | |

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 Type	Action By:	Filter
	All ▾	All ▾	All ▾	Clear Filters
	Supplier:	Action Type:		
	All ▾	All ▾		

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	→	Select either 'Daily' or 'Weekly' and the time
Time	09:00 🕐	→	
Action Type	All ▾	→	e.g. Updated Details, Shared Audit, Deleted Audit, Responded
Action By	All ▾	→	e.g. A specific user or selection of users
Supplier Type	All ▾	→	
Supplier	All ▾	→	Options here will show based on the Supplier Types set up in Supplier Manager
Site	All ▾	→	
	Add Subscription		e.g. A specific supplier or selection of suppliers

| Timescale | Time | Day | Site | Supplier | Supplier Type | |
| You currently have no records... | | | | | | 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	● Daily ○ 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 🗑

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14. SUPPLIER PROVIDED AUDITS

14.1 VIEW AUDITS IN PROGRESS

Step 1: From 'Company Audits' view select the **Supplier Provided Audits** tab.
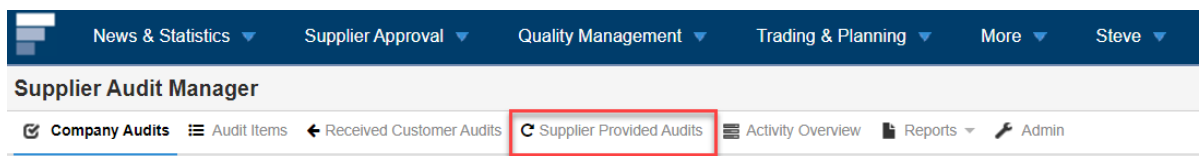
Step 2: The view of audits will show as below, this can be filtered using the options at the top of the screen to assist finding a specific record (if required). Select the menu button for the audit you would like to view and then select **View** from the options presented.
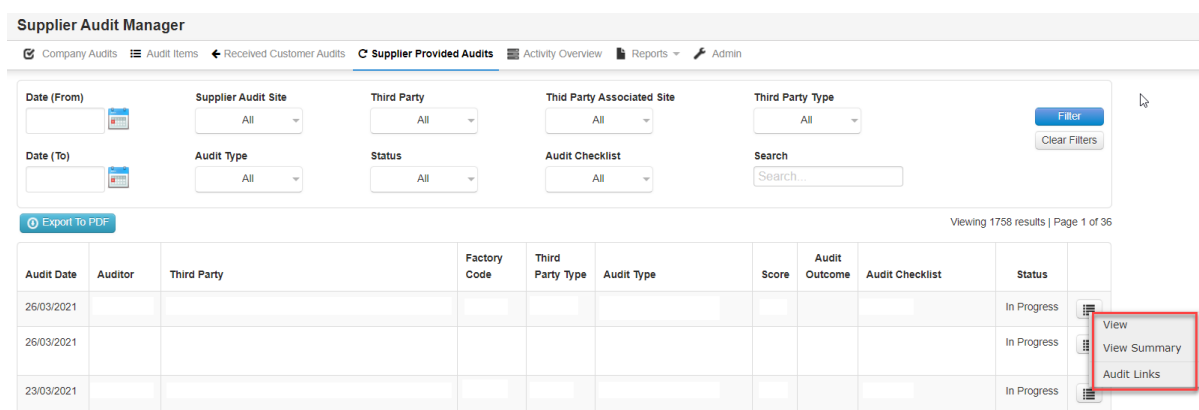
14.2 FINALISING COMPLETED AUDITS

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.

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

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