

Company & Site sharing

A Certification Body (CB) can;

- Edit, and upload audit reports for any site shared with them
- Edit, assign audit ownership and create users for any Company shared with them

If a site is not shared with a CB it will not be possible for that CB to create and maintain an audit record for that site.

Companies & sites created by a CB are shared by default (until such a time sharing is revoked by the company).

In the event of a site transferring to a new CB, the company that owns the site must share their site with the new CB before an audit report can be uploaded or edits made to the site record by that CB.

Companies can also share their own company record with a CB, which on completion will allow the CB to make edits to the companies name, address & contact details for that company.

If a company is not able to complete sharing configuration of itself or associated sites, BRCGS will complete the process on request from the new CB.

Identifying if a site or company is shared with your CB

The functionality to identify if a site or company is shared with a CB will be expanded soon after go-live. In the interim

1. Open the Menu tool in the top right corner. If the only option shown is "Change log", sharing is not configured



2. Locate and open the company or site record in question

Sharing a company record with a CB (to be completed by the company or BRCGS on request)

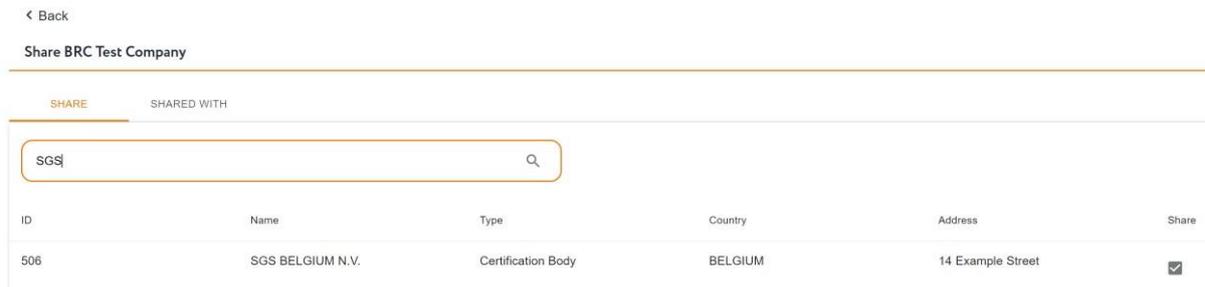
1. From the *Companies* area – click on the orange company name in the *Company* column to open the record
2. From the *Associated Sites* area in the company record, locate and open the site to be shared by clicking on the orange site name text
3. From the *Menu* tool in the top right corner, select *Sharing*

Doc ref	Version	Last edit date	Last author
NGD0007	1.0	25 March 2021	Antony Harrison

Next Generation Directory user guide

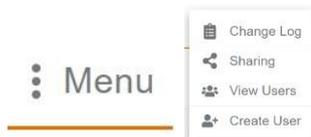


4. From the *SHARE* tab, enter the name of the required CB and press enter to complete the search
5. When the correct CB record has been located, select the *Share* box in the far right column to complete the process a green confirmation message will appear in the bottom right corner of the page and the newly selected CB will be added to the SHARED WITH tab

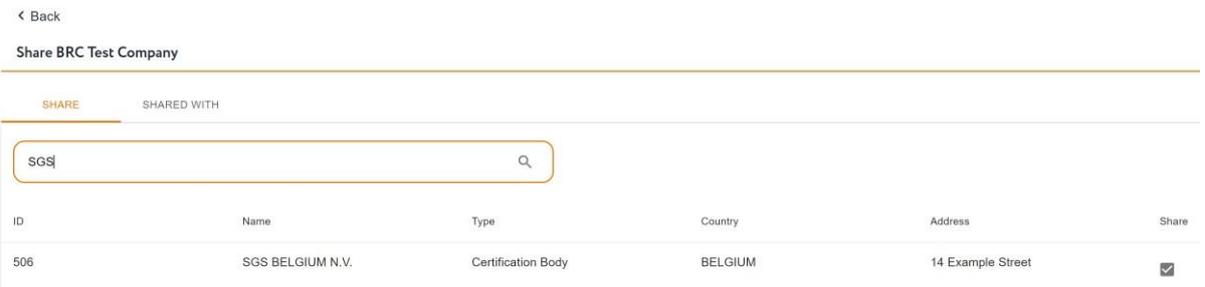


Sharing a company record with a CB

6. From the *Companies* area – click on the orange company name in the *Company* column to open the record
7. From the *Menu* tool in the top right corner, select *Sharing*



8. From the *SHARE* tab, enter the name of the required CB and press enter to complete the search
9. When the correct CB record has been located, select the *Share* box in the far right column to complete the process a green confirmation message will appear in the bottom right corner of the page and the newly selected CB will be added to the SHARED WITH tab



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