BRCGS Directory PRO

Configuring transfers in Directory

A guide for BRCGS audit owners

Introduction

This document describes how to share your company's Directory account, and Site and Audit records with a certification body in the BRCGS Directory.

DO NOT CREATE A DIRECTORY LITE ACCOUNT
If your site has been audited before, your company has an existing Directory Pro account.

The certification body that conducted your site's last BRCGS audit is responsible for:
- Confirming your Directory Pro account details.
- Adding new User profiles so the account can be accessed.
- Linking site and audit records to the correct account.
- Amending company name and address details as required.

For account access, or for sites and audits to be linked your account, contact the certification body that conducted the site's last audit.

When you have account access with relevant site and audit records linked, those records can be shared with your newly appointed certification body.

Three record types should be shared: Site, Company account and Audit.

▶ Watch a demo video showing the transfer process

Share Company and Site records

1. Select **My Company** from the left-hand menu.
2. Click on the orange company name to open the Company record.
3. From the top right corner, select the **Menu** tool, followed by **Sharing**.
4. Enter the first three letters of the certification body and select the magnifying glass to search.
5. On location of your appointed certification body, tick the Share box in the right-hand column.
6. Click **Back** (top left corner) to return to the Company record.
7. Scroll through the company detail to the section titled **Associated Sites**. All Site records which are linked to your company's account are listed.
8. Open the Site record you wish to share via the orange site name.
9. From the top right corner, select the **Menu** tool, followed by **Sharing**.

Follow steps 4 and 5 above to complete the sharing process.

Audit record sharing

1. Select **My Audits** from the left-hand menu.
2. Use the search bar and unique site code to locate the audit to be shared.
3. Select the 3-dot quick menu in the right-hand column followed by **Sharing**.
4. Enter the first three letters of the certification body and select the magnifying glass to search.
5. On location of your appointed certification body, tick the **Share** box in the right-hand column.

Sharing a company account, site and audit records, allows a selected certification body to:
- Assign new audit reports to that account.
- Create new site records for that account.
- View shared audit records.

Assistance

Directory password reset
Select the **Forgot Password** feature from the Directory login page.

New User profile required
New User Profile's for a Company account can be created by:

- Your current certification body that completed your site's last audit.
- Existing User Profile holders linked to the Company account.
- BRCGS on request (requires provision of audit contract.

No user profile activation email received
1. Check your email accounts junk folders.
2. If no activation email is received, add msonlineservicesteam@microsoftonline.com to your safe senders list and use the **Forgot Password** option on the Directory sign-in page to retrigger.

Lite account deletion
If a Directory Lite account has been created in error and removal is required, sign in to that account and use the **Assistance** feature in the left-hand column to raise a **Remove Lite account** request.

Locating your Company ID and Site Codes
Company ID's can be viewed in the top left corner of the page, after signing in.

Site Codes are published on all BRCGS certificates and audit reports and can be viewed in **Certificate Tracker** or on the 'Sites' tab of **My Company**.

Gaining access to records that are not assigned to your account

If a site or audit record owned by your company is not accessible following sign-in to your Directory account, re-configuration may be required.

In the first instance, contact the certification body that conducted the most recent audit for that site. If that certification body no longer has access to the Directory, BRCGS can provide assistance as follows:

Site records: Following provision of a valid audit contract held between your company and a BRCGS approved certification body, BRCGS will assign sites referenced in that contract to a Directory account sharing the same name as the company referenced as the client in that contract document.

Audit records: BRCGS can only re-assign audits from one account to another if the certification body that submitted the audit report is no longer BRCGS approved and has no access to the Directory.

A copy of the audit contract held by your company to instruct the audit records in question is required to enable validation of your company's association with and right to access those records.

For both Site and Audit record re-configuration, a request should be raised via the **Assistance** feature following Directory sign in.

BRCGS cannot accept a certificate document as evidence of an individual person's relationship with a site, audit or company account.