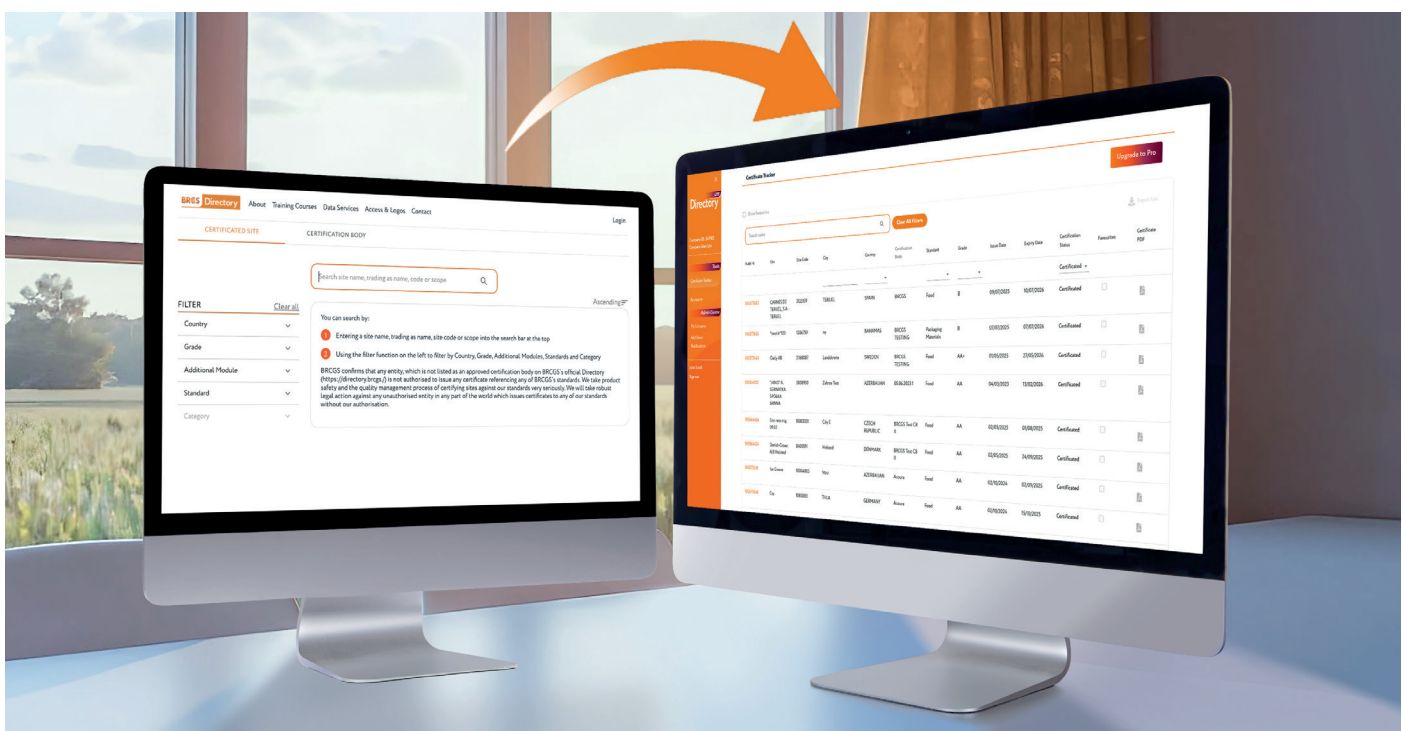# BRCGS Directory PRO

User guide for BRCGS audit owners

This guide provides guidance to BRCGS audit owners on how to manage their BRCGS Directory account.

Contents

Introduction

The BRCGS Directory hosts all audits conducted against a BRCGS Standard, with associated certificate documents where applicable.

Audit content within Directory is updated exclusively by BRCGS approved certification bodes.

Directory allows verification of certification status and scope for any BRCGS audited site.

New company accounts

Companies that own a certificated status BRCGS audit are eligible for a Directory Pro account in their company's name.

This section describes how to create an account for your company in Directory. This process should be completed by an employee of the company entering a contract to be audited by a BRCGS approved certification body.

Completion of this step allows certification bodies to assign audit records to your and how to convert that account to Directory Pro. Directory account. This will occur after the audit has concluded and the certification decision made.

If your company has an existing BRCGS Directory account, please do not create a new one.

Requirements
- Accounts should be created using the name and address of the company that is referenced as the certification body's client in the contract for audit services.
- BRCGS will validate the accuracy of the name and address provided prior to permitting audit records to be assigned to the account.
- An email address relating to and accessible to a company employee must be provided.

STEP 1	STEP 2	STEP 3
Visit the Directory to create a free Directory Lite account.	Tag your appointed certification body in the 'Sharing' tool.	Provide your unique Company ID to your certification body.

Your appointed certification body will coordinate upgrade of your account to Directory Pro with BRCGS, following Step 3. BRCGS will notify you when completed.

Your certification body will create Directory 'site' records for all locations to be audited as part of your audit contract and assign those sites to your Directory account.

After conclusion of the audit process and following the certification decision, your certification body will assign audit reports and associated documents to your Directory account, making them accessible to user profiles linked to it.

All steps are described in more detail in the 'New Company account creation' document.

Directory Pro overview

The BRCGS Directory hosts all audits conducted against a BRCGS Standard.

During audit administration, records are assigned to the Directory Pro account of the entity considered to be the owner of the report and certificate, by the auditing certification body.

Those with a user profile linked to a Directory Pro account can access any audit record assigned to that account by the administrating certification body, so all audits are accessible from one account.

Your Directory Pro account also allows you to configure:
• Display of key contact details for your sites.
• The level of data relating to your sites and their audits that can be accessed by other Directory users.

Directory Pro tools

Directory Pro features an extended toolkit facilitating efficient supplier approval activities. A Directory Pro account allows linked user profiles to access:
• Certification status detail and PDF certificates where applicable for sites audited against a BRCGS Standard.
• Audit records (reports and certificates) for any audit owned by your company.
• Audit records for any audit shared with your company by the owners.

The BRCGS Directory is used by retailers, manufacturers and other specifiers to validate the scope and status of an individual site's BRCGS certification status.

Favourite tagging

The Certificate Tracker tool in Directory Pro allows BRCGS audit owners to tag up 250 sites as a 'Favourite'. Once tagged as a favourite, users receive notification alerts relating to certification status changes at the site and can export certificate data relating to the site to Microsoft Excel.

The limit of 250 sites can be extended by arrangement.

Access to confidential content

Audit reports contain confidential, commercially sensitive information.

Certification bodies are required to assign audit reports to the Directory account holding the company name and address as their 'client', as referenced in the audit contract.

The accurate allocation of audits to the corresponding Directory account, is the exclusive responsibility of the certification body acting under contract. Where discrepancies occur, a copy of the audit contract held between a company and the appointed certification body may be requested by BRCGS to validate client identity.

Directory only allows access to confidential audit content where shared by the audit owner.

Configuring your site's details and content availability

Those with a user profile linked to a Directory Pro account can configure the following content for their sites and audits, where those records are assigned to the company's account.

Site contact details
Individual site records can display name and email details for a technical and commercial contact. To configure:
- Access the 'Site' tab in 'My Company' and open the individual site record to be updated.
- Select the 'Menu' tool in the top right corner, followed by 'Edit'.
- After updating the details required, select 'Submit' to complete the process.

Audit sharing
Audit reports contain confidential information and can only be accessed by the company that owns them, or following sharing by a user related to the owning company. Sharing is configured on an individual audit record basis:
- Access 'My Audits' and identify the audit record to be shared.
- From the 3-dot quick menu in the right-hand column, select 'Sharing'.
- Search Company ID or name to locate the recipient company.
- Tick the 'Share' box in the right-hand column.
- Access can be instantly rescinded by removal of sharing tick.

Certificate Tracker configuration
Directory's Certificate Tracker tool displays the name, address, scope and status for sites audited against a BRCGS Standard. If a site has 'Certificated' status, the corresponding PDF certificate can be downloaded by all Directory Pro users.

No audit report content can be accessed via Certificate Tracker and access to site identification details and certificate download availability can be restricted as follows:
- Access 'My Audits' and identify the audit record to be shared.
- Click the orange Audit ID link to open the record.
- Select the 3-dot quick menu tool in the top right corner, followed by 'Sharing'.
- From the 'Certificate Tracker Access' tab, select the level of display required.

If *Basic Display only* is selected, the record is 'restricted'. The site name, address and certification parameters are inaccessible to users, the record cannot be tagged as a favourite, and any associated certificate is inaccessible. Users can view the certificate status value and site code only, anonymising the site.

Adding user profiles

New user profiles can be added by a company's existing user. To add new users, open the 'Users' area and use the 'Add User' tool.

User profiles should only be created for persons employed by your company. Profile creation for consultants and other third parties is not permissable.

A Directory Pro account allows up to five user profiles to be linked to it by default. Additional profiles are available on request via the in-application 'Assistance' feature. Charges may apply.

New user profiles can also be created by appointed certification bodies and BRCGS on request.

Note: If a user profile activation email is not received, please check junk/spam folders or add msonlineservicesteam@microsoftonline.com to your safe senders list. Activation emails can be re-triggered at any time via the 'Forgot Password' feature.

Extending Favourites limit

Directory Pro's Certificate Tracker tool allows the tagging of up to 250 sites as a 'Favourite' at any given time. This limit can be extended on request, via the 'Upgrade Favourites' option within Certificate Tracker. Charges may apply, subject to status.

Configuring notifications

Directory sends notification alerts relating to certification status changes for audit records owned by or shared with your company or where tagged as a 'Favourite' in Certificate Tracker.

Notification trigger events can be configured or turned off as required. Visit the 'Notifications' tool in the main menu to apply updates.

Notification emails are enabled for all events and categories by default and configuration changes must be applied by the individual user.

Directory Pro API

BRCGS offer an API service for Directory Pro account holders, following purchase.

The API allows programmatic acquisition of certification data for sites tagged as a Favourite in Certification Tracker.

API is offered on a self-service implementation basis, with purchase enabling access to supporting technical documentation and client registration.

Further information is available via the 'API Upgrade' feature within Certificate Tracker.

Support

BRCGS has a dedicated support team that can help with queries about the Directory.

• To raise a query, please use the 'Assistance' feature following sign in.
• If access to the platform is not possible, general queries can be raised here.

Service levels and expected response times will be advised within the query form and may differ depending on volume of queries received and team availability.

Please do not submit queries via email unless specifically requested by BRCGS. Queries raised via email may not be accessible by the correct support team in a timely manner which will delay response times.

BRCGS support parameters
BRCGS support cannot complete the following actions:
• Edit audit records
• Edit site records
• Extend or adjust certification periods
• Share site, company or audit records with a certification body
• Re-assign audit records from one Directory account to another
• Add user profiles to a Directory account without supporting evidence

The above actions must be executed by appointed certification bodies or by individual users.

Eligibility

Companies identifiable as the owner, or future owner, of a BRCGS audit are eligible for a Directory Pro account without additional charge above the Service Fee paid to their appointed certification body as part of the arrangement for that audit to be conducted.

This company is expected to be described as the client in the audit contract held with the appointed certification body and will be referred to as the 'audit owner' by BRCGS where clarification is required. Directory Pro access for audit owning companies is offered as a 100% discount on the retail product cost, as available on the BRCGS Store. BRCGS reserves the right to review the parameters of that discount and eligibility for it.

Directory Pro access and eligibility on this basis requires validation from a BRCGS approved certification body.

Where claims of eligibility for Directory access or audit ownership require further verification, BRCGS may request a copy of the audit contract formed between the certification body and their client.

A company ceases to be eligible for Directory Pro access three months after the expiration of their final BRCGS certificate. To maintain Directory Pro access after that point, a purchased upgrade is required via the BRCGS Store.

Where eligibility via certification status or purchase is not present, Directory Pro accounts will be transferred to Directory Lite accounts, with access to owned and shared audits. Directory Pro features in Certificate Tracker will be removed until Directory Pro eligibility is re-established via status or purchase.

Entities who are not BRCGS audit owners can obtain Directory Pro accounts via purchased upgrade.

Permissible uses

Directory Pro and the content accessible within it, is made available for the exclusive use by persons employed by the account holding company and for compliance administration purposes only.

Resale or wider distribution of content acquired from Directory, or of user profiles, is not permitted. Acquisition of data or other content via tools other than those natively available in the application, is not permitted. This includes automated or programmatic acquisition of data via locally implemented compilation tools.

Further information regarding permissible utilisation of Directory is available in Terms and Conditions accessible via the log in page.

Definitions

Company – organisation that owns or intends to own one or more certificated status BRCGS audit. This company is expected to be described as the certification body's client on the audit contract and may not itself be a site subject to audit. May alternatively be described as the 'audit owner'.

Directory Account – service allowing access to Directory for a specific company. Accessible content, tools and services vary by account type.

Company ID – unique identifier allowing immediate location of a company's account in Directory.

Contract – formal agreement held between a company and a certification body for audit services to be provided for defined sites.

Site – unique location subject to audit. Typically owned by the company.

Site record – name and address record of an individual site, linked to the account of a company on a parent/child basis.

Site code – unique identifier allowing immediate location of a site record in Directory. Listed on all valid BRCGS certificates and audit reports.

Audit record – audit report and certification history relating to a specific site and a Standard. Audit records are maintained by certification bodies acting under contract and are assigned to the Directory account of the owning company.