

Configuring transfers in Directory

A guide for BRCGS audit owners

Introduction

This document describes how to share your company, site and audit records with a certification body in the BRCGS Directory. Completion allows a certification body to:

- Link audit reports to your company account, enabling you to access them and refreshing certification statuses.
- Edit your site and company name and address details.
- Review previous audit reports issued by other certification bodies.

To begin the process, sign in to the BRCGS Directory.

Company sharing

Allows the selected certification body to assign audit records to your Directory account.

1. Select 'My Company' from the left-hand menu.
2. From the Company tab, click the orange Company name to open the 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.

Site record sharing

Allows a certification body to create new audit records referencing the shared site record. This process does not share previously created audit records.

1. Select 'My Company' from the left-hand menu.
2. From the Sites tab, click the orange site name to open the relevant 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.

Audit record sharing

To allow the selected certification body to view the shared audit report in full. No editorial or configuration permissions are made available.

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.

Assistance

Directory password reset

To re-activate a Directory User account, or reset a password, use the 'Forgot Password' feature from the [Directory Login page](#).

New user profile required

New user profiles for your company account can be created by:

- Existing user profile holders linked to your company.
- Any certification body with whom your company account is shared.
- BRCGS on request, following provision of supporting documentation.

No user profile activation email received.

1. Check your email account junk folders.
2. If no activation email has been received, add msonlineserviceteam@microsoftonline.com to your safe senders list and use the 'forgot password' option on the Directory sign-in page to retrigger.

Locating your company ID and site codes

All company accounts have a unique reference number, allowing immediate identification of that company in Directory. Company ID's can be found in the top left corner, under the Directory logo.



All sites have a unique, permanent 'site code' that is an identifier for that location. Site codes are published on BRCGS certificates and audit reports and can be viewed in Certificate Tracker or in 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 Directory, re-configuration may be required. In this instance, BRCGS can provide assistance on request, following provision of supporting documentation.

Site records

BRCGS can assign site records to your company account on provision of supporting documentation.

1. Sign-in to Directory and select the 'Assistance' tool in the left-hand menu.
2. Select the 'Request site access' option.
3. Detail the name, address and site codes of the site to be added.
4. Attach supporting documents (as described on page 3).
5. 'Submit' the request

The BRCGS support team will process the request within three business days (unless otherwise advised), providing a response on conclusion, or if further information is required.

Assigning a site to a company account does not allow access to previously created audit records referencing that site.

Audit records

Assigning an audit record to the correct company account is the exclusive responsibility of the certification body acting under contract to conduct the audit. BRCGS cannot re-assign an audit on behalf of a certification body, but where appropriate will request a certification body considers the accuracy of configuration applied.

1. Sign in to Directory and select the 'Assistance' tool in the left-hand menu.
2. Select the 'Request owned Audit access' option and complete the requested content.
3. Attach supporting documents, as described below.
4. 'Submit' the request.

Certification bodies are required to configure Directory audit access in accordance with the audit contract held between themselves and the instructing client. Any requirement that contradicts that position must be arranged directly between the certification body and their client with no BRCGS support available.

Supporting documentation and assessment

Prior to assigning a site to a company account or requesting consideration of audit re-assignment by a certification body, BRCGS require documentation to support the request. The process aims to verify the relationship between the client's Directory account, the requested records and the authority of the individual to make the request.

A copy of the audit contract held between a client and the appointed certification body is preferred.

- Documentation should be provided via attachment in the request, with no content can be accepted via email.
- Documentation must be originally issued by a BRCGS approved certification body.
- Documentation must clearly reference the client's company name, address and the individual sites relevant to the request.
- Where specific site details are excluded from that document, additional audit application content as issued by the certification body is required.
- If the 'client' name and address detailed in the document are substantially different to those detailed in the Directory company account, BRCGS will request additional validation from the certification body referenced.
- BRCGS will consider requests submitted by employees of the entity referenced as the client in the audit contract only.
- Requests submitted by consultants and other persons not directly employed by the client cannot be considered.