

TraQtion Member User Reference Guide

Printed: May 1, 2023

LGMA has partnered with TraQtion for Member Audit Management. To begin, log into TraQtion per the instructions below.

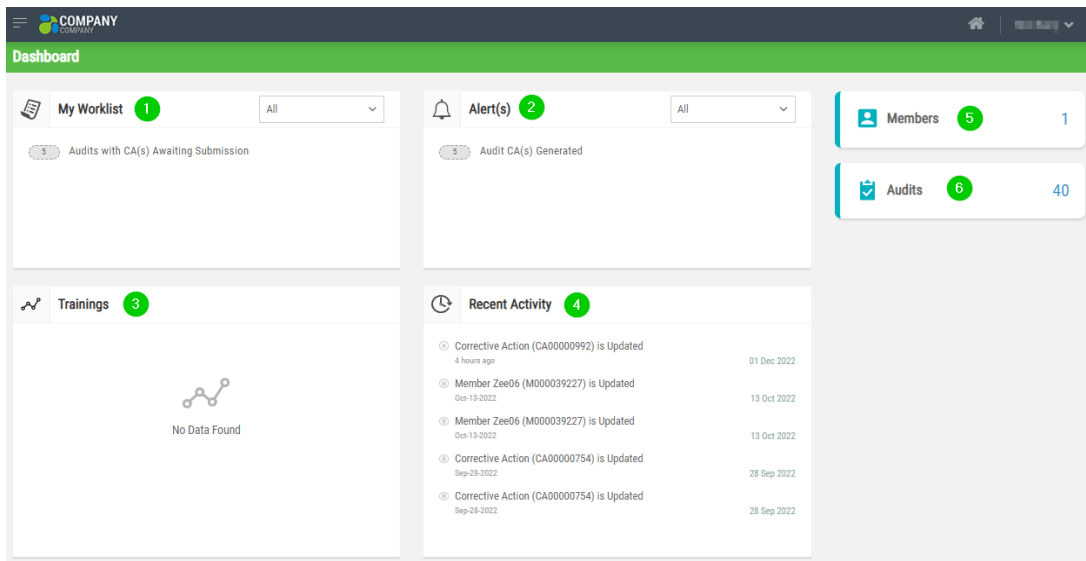
Initial Login and Account Set Up

The first step is for LGMA to create their member record in TraQtion. Next, the member's designated TraQtion user will receive an invitation via e-mail to register as an active user; this is a multi-step authentication process. Once the user registration is completed successfully, the user(s) will have access to the portal via the link below and can upload facility Auditation.

Link to TraQtion portal: <https://apps.traqtion.com/sqsapp/#/login>

Home Dashboard

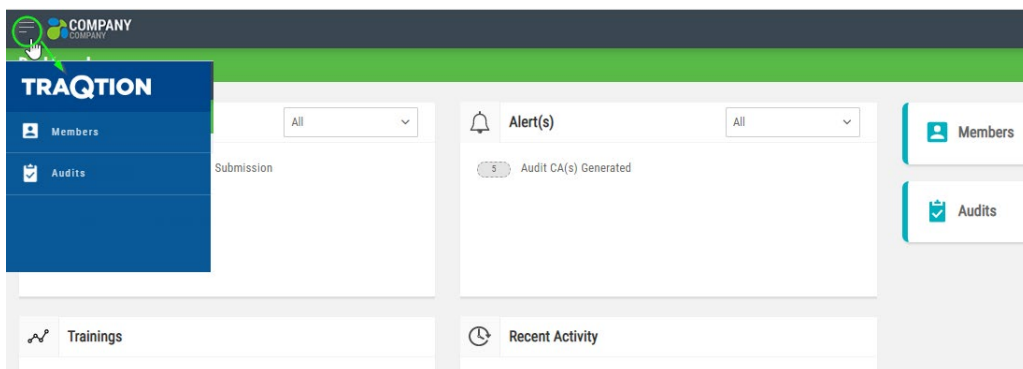
After logging in, the home dashboard appears. You can access it at any time by clicking on the Home button in the upper right corner. It will show:



1. Items that require action
2. Items that may need attention
3. Training guides, manuals, etc.
4. Any recent activity performed in the system
5. A full count of all members for this user.
6. A full count of audits for member(s)

Main Menu

At any point during your navigation of the TraQtion system, you can access the main menu by hovering your cursor over the menu icon in the upper left corner of the screen.



You will have access to the following items:

1. Member Module – this will direct you to the Member Landing Page
2. Audit Module – this will direct you to the Audit Landing Page

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Member screen

From the Home screen, you can click on the Member section on the right side of the screen, or click on the Member module from the main menu, you will be taken to your assigned member record.

The screenshot shows the TraQtion dashboard. At the top, there's a header with 'COMPANY' and a home icon. Below the header is a green 'Dashboard' bar. The main area has a 'My Worklist' section with a dropdown menu set to 'All'. To the right is an 'Alert(s)' section with a dropdown menu set to 'All'. On the far right, there's a 'Members' section with a green circle around the 'Members' text and a green arrow pointing to the 'Edit' button. Below this, there's a 'LGMA Member 1' section with a green bar at the top. It contains a table with member information and a tabbed interface with 'Information' selected. The 'Information' tab shows member details like Member #, Member Name, Type, Status, and LGMA Member #. Below this is an 'ADDRESS INFO' section with fields for Address Line 1, Address Line 2, Address Line 3, Country, State/Province, Town/City, Time Zone, and Geo Location.

It will direct you to the member record screen and it will allow you to view and manage the following after you select Edit:

The screenshot shows the 'LGMA Member 1' record screen. At the top, there's a green bar with 'LGMA Member 1' and an 'Edit' button. Below this is a table with member information. The 'Information' tab is selected, showing member details like Member #, Member Name, Type, Status, and LGMA Member #. Below this is an 'ADDRESS INFO' section with fields for Address Line 1, Address Line 2, Address Line 3, Country, State/Province, Town/City, Time Zone, and Geo Location.

- Information – the member detail information, i.e. address
- Contacts – the contact associated to the Member. Additional contacts can be added to the members address, or if the additional contact has a different address, you can add a new address as well for that contact. You can also

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select whether that new contact will receive email notifications and/or if they will also get an account created for login.

- Grower – you can view the growers that are associated to your member. You can also view the Valid From and Valid To dates. You can select a grower ID and then view the details for that grower.
- Audits –these are the Audits associated to the member. Each Audit will have a link to the Audits module where you will have full access to the Audit details, as well as the option to submit the required corrective actions.
- Notification – a history of all the communications sent from the system to the Member
- Users – all users with access to this member only.
- Communications – LGMA can create Member comments visible to Member users.
- Audit Trail – a history of changes for the Member, broken down by each tab.

Audits

If you select Audits from the button on the left, you will be brought to your Audit Dashboard. You will see the following details:

- Audits by Status
- Recent Activity
- My Worklist
- Alerts

Within the Audit dashboard, you can select the Search Audit button, this will bring you to a list of all of your audits, you can also access this list by selecting the number from the main dashboard within the Audit button. Here you can sort/access your audits, view corrective action statuses.

The screenshot displays the TraQtion Member User Interface. At the top, there is a green header bar with 'Dashboard' and 'Audit' tabs. Below the header, the main dashboard area is divided into several sections. On the left, there is a sidebar with icons for 'My', 'Audit (By Status)', and 'Audit Trail'. The central area shows 'Audit (By Status)' with a 'No Data Found' message. To the right, there is a 'Recent Activity' section with a 'No Data Found' message. Further right, there are two summary cards: 'Members' with a count of 1, and 'Audits' with a count of 40. A green circle highlights the 'Audits' card. Below the dashboard, there is a 'Search Audit' section. It features a 'Filter Result' dropdown and a table of audit results. The table has columns for Audit #, Member, Grower, Audit Type, No. of Corrective Actions by Status, Auditor Name, Audit Status, Audit Round, Schedule Date, and Schedule. The table contains five rows of audit data. A green arrow points from the 'Search Audit' button in the top right of the dashboard to the 'Search Audit' section below.

Audit #	Member	Grower	Audit Type	No. of Corrective Actions by Status	Auditor Name	Audit Status	Audit Round	Schedule Date	Schedule
AUD0001261	M000038308 - LGMA Member 1	G000038321 - Grower A2	Audit 2022-2	In Review(1)	Member 1	Completed	Round 2022 - 2	01 Dec 2022 13:00	
AUD0001247	M000038308 - LGMA Member 1	G000038310 - LGMA Grower 16	Audit 2022-2		Member 1	Created	Round 2022 - 2		
AUD0001243	M000038308 - LGMA Member 1	G000038310 - LGMA Grower 16	Audit 2022-2		Member 1	Created	Initial Full Scope		
AUD0001242	M000038308 - LGMA Member 1	G000038321 - Grower A2	Audit 2022-2		Member 1	Created	Initial Full Scope		
AUD0001240	M000038308 - LGMA Member 1	G000038321 - Grower A2	LGMA Announced		Member 1	Booked	Round 2022 - 2	30 Nov 2022 14:00	

When you select an Audit number, you will be taken to that audit and are able to see the following:

1. Audit Information
 - a. Audit Number
 - b. Audit Type
 - c. Audit Status
 - d. Pending CA
2. Assessment Details


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- a. Member Audited
 - b. Grower Audited
 - c. Grower Address
 - d. Product(s)
 - e. Auditor Name
 - f. Date
 - g. Duration of Audit
 - h. Geo Location
3. List of Audit Categories
 4. Selected Category Questions
 5. Approval Cycle
 6. Corrective Actions
 7. Download Audit Report
 8. Download Corrective Action Report

[Home](#) | **Audit - AUD0001261** [Back](#)

1



Audit #

AUD0001261

Audit For

Member

Audit Type

Audit 2022-2

Audit Status

Completed

Announced

Yes

Review Required

Yes

Audit Category

Regular

Pending CA

Yes

5

Information

6

Approval Cycle

6

Corrective Actions

2

ASSESSMENT DETAILS

7

[Audit Report](#)

8


[Corrective Action Report](#)

Audit Round	Effective Date	Due Date
Round 2022 - 2	01 Oct 2022	31 Dec 2022

Member	M000038308 - LGMA Member 1
Grower	G000038321 - Grower A2
Grower Address	[Redacted]
Product	
Auditor Name	[Redacted]
Schedule Audit	01 Dec 2022, 13:00
Audit Facetime	01 Dec 2022, 09:33 - 01 Dec 2022, 09:41
Reason for Rebook	-
Geo Code Location	Lat: [Redacted] Long: [Redacted]
Special Instructions	-

Map

Satellite



Section 1: Pre-Season Environmental Assessments

2/3

3

[PREVIOUS](#) | [NEXT](#)

4

FA01 Was a detailed Pre-Season Risk Assessment completed prior to the first essential planting? If yes, answer questions #FA 2

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Corrective Actions

Once an audit has been performed and reviewed, corrective actions might be generated. An email notification will be sent indicating that action is necessary. You can access the corrective action in multiple ways:

- My Worklist
- Alerts
- Audit

When you enter an audit with pending corrective actions, select the Corrective Actions tab, then select the Respond to CA button.

The screenshot displays the 'Audit - AUD0001163' interface. At the top, a green header bar contains a home icon, the audit ID, and a 'Back' button. Below this, a summary section shows audit details: Audit # AUD0001163, Audit For Member, Audit Type LGMA Announced, Audit Status Completed, Announced Yes, Review Required Yes, Audit Category Regular, and Pending CA Yes. The 'Corrective Actions' tab is selected and highlighted with a green circle. Below the tabs, a table lists corrective actions. The first row shows CA - CA00000916 with a 'Respond to CA' button. The second row shows CA - CA00000917 with a 'Respond to CA' button highlighted by a green circle. The third row shows CA - CA00000918 with a 'Respond to CA' button. The fourth row shows CA - CA00000919 with a 'Respond to CA' button. The fifth row shows CA - CA00000920 with a 'Respond to CA' button. The sixth row shows CA - CA00000921 with a 'Respond to CA' button. The table also includes columns for Due Date (09 Dec 2022) and Status (Closed or Response Pending). At the bottom, a section titled 'Section 1: General Requirements' is visible, along with a page indicator '7/17' and navigation buttons '< PREVIOUS' and 'NEXT >'.

You will be taken to the corrective action that needs addressing. Select the Edit button to enable the response sections.

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The screenshot shows the 'View Corrective Action' interface. At the top, a green header bar contains the title and navigation buttons. Below this, a summary row displays key information: CA# CA00000917, Source Audit, CAR Type Audit, Due Date 09 Dec 2022, and Status Response Pending. The main content area is divided into three sections: 'CORRECTIVE ACTION DETAILS', 'CORRECTIVE ACTION REVIEW COMMENTS', and 'CORRECTIVE ACTION RESPONSE'. The 'DETAILS' section includes fields for Section, Sub Section, Question Description, Answer, Auditor Comments, Audit, Non Conformance, Severity, and NC Comments. The 'REVIEW COMMENTS' section shows a table with columns for Date & Time, Added By, and Comments. The 'RESPONSE' section contains text areas for Containment Plan, Root Cause Analysis, and Corrective Action Plan. To the right of the response section is the 'CA RESPONSE ATTACHMENT' area with an 'Attach File(s)' button. Numbered callouts are placed over the interface: 1 points to the 'Edit' button in the top right; 2 points to the 'View All' link below the image placeholder; 3 points to the 'CORRECTIVE ACTION RESPONSE' section header; 4 points to the 'Attach File(s)' button; and 5 points to the 'Submit CA Response' button in the top right.

View Corrective Action [Print Preview] [Edit] 1 Jack

View Corrective Action [Print Preview] [Submit CA Response] [Save] 5

CA# CA00000917 Source Audit CAR Type Audit Due Date 09 Dec 2022 Status Response Pending

CORRECTIVE ACTION DETAILS

Section	General Requirements
Sub Section	-
Question Description	Does it specifically address the following subjects consistent with the LGMA:
Answer	Water
Auditor Comments	add water
Audit	AUD0001163
Non Conformance	Yes
Severity	Minor Deviation
NC Comments	Minor

No Image Available [View All] 2

CORRECTIVE ACTION REVIEW COMMENTS

Date & Time	Added By	Comments
No comments are available		

CORRECTIVE ACTION RESPONSE 3

Containment Plan
Containment Plan

Root Cause Analysis
Root Cause Analysis

Corrective Action Plan

CA RESPONSE ATTACHMENT 4

[Attach File(s)]

Select appropriate files to add here

5

1. Edit button – enables response fields
2. View All – view any images attached to the CA from the audit
3. Corrective Action Response – respond with the plan to correct the nonconformance
4. CA Response Attachment – attach any necessary files
5. Submit CA Response – select Submit CA Response button to send plan response

Once the CA response is submitted, it will be reviewed and accepted or returned with comments. If returned, an email and notification in My Worklist will be sent.

Please contact TraQtion Support at support@traqtion.com with any questions or issues in the application.