TraQtion Member User Reference Guide

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

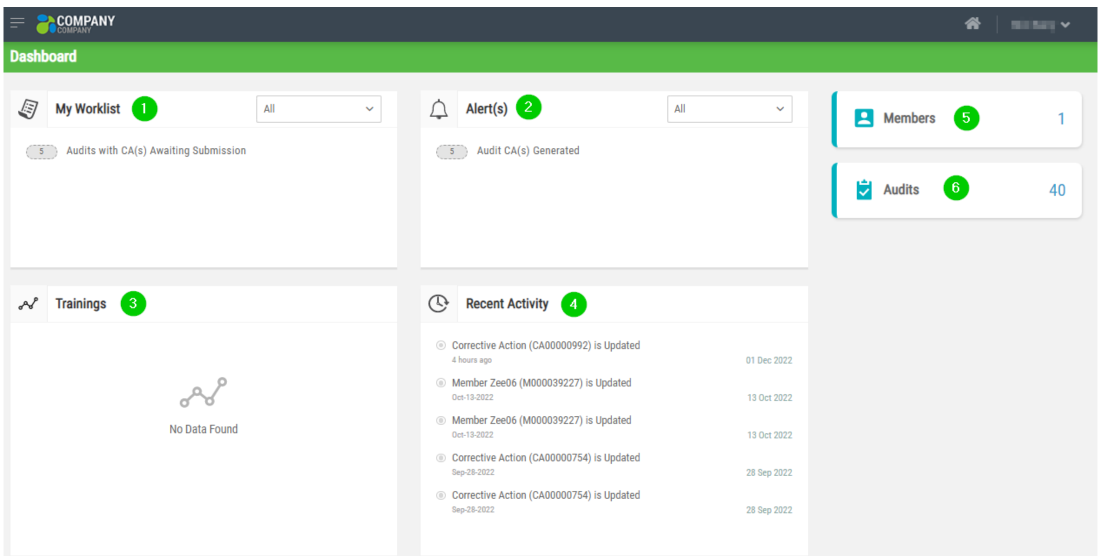
Initial Login and Account Set Up

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

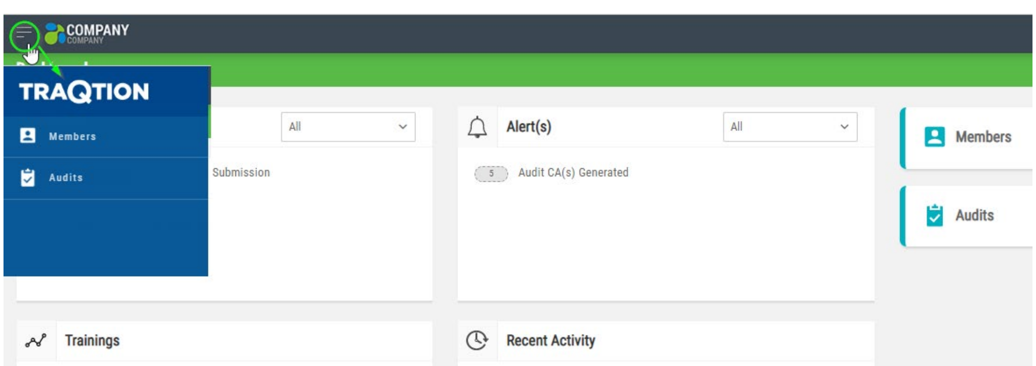
After logging in, the home dashboard appears. You can access it at any time by clicking on the Home button in the upper right corner. It will show:



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.

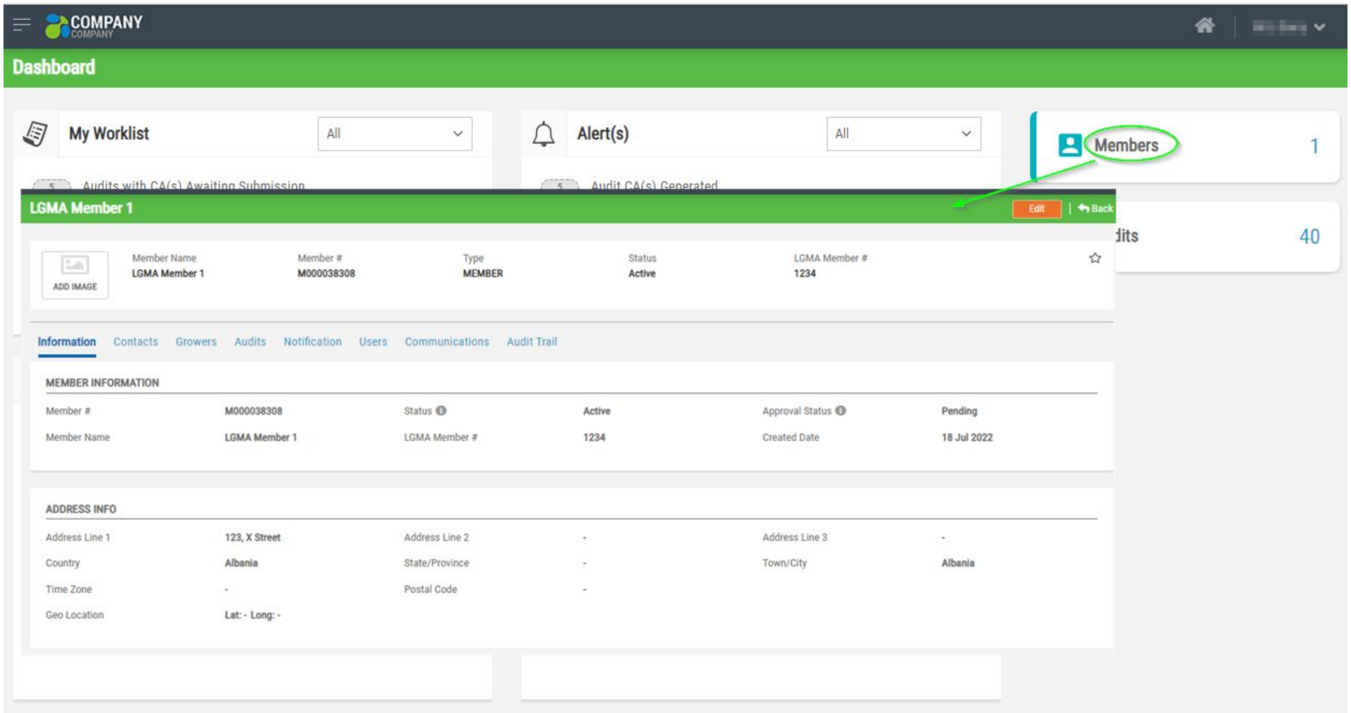


You will have access to the following items:

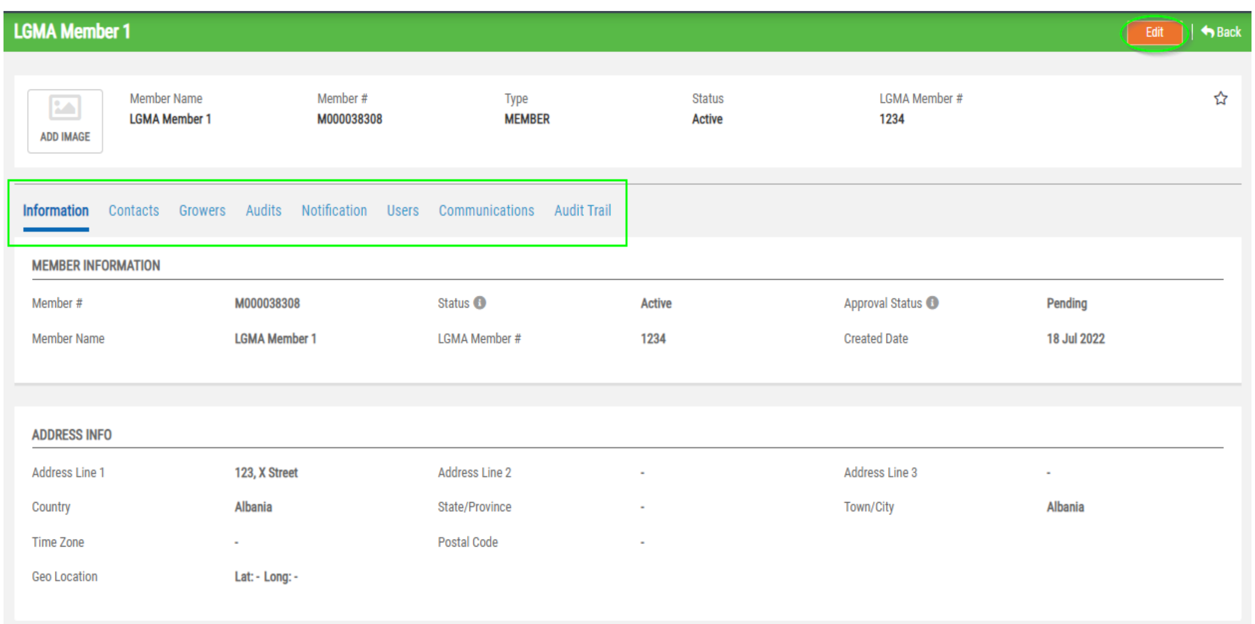
1. Member Module – this will direct you to the Member Landing Page
2. Audit Module – this will direct you to the Audit Landing Page

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.



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



- 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

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

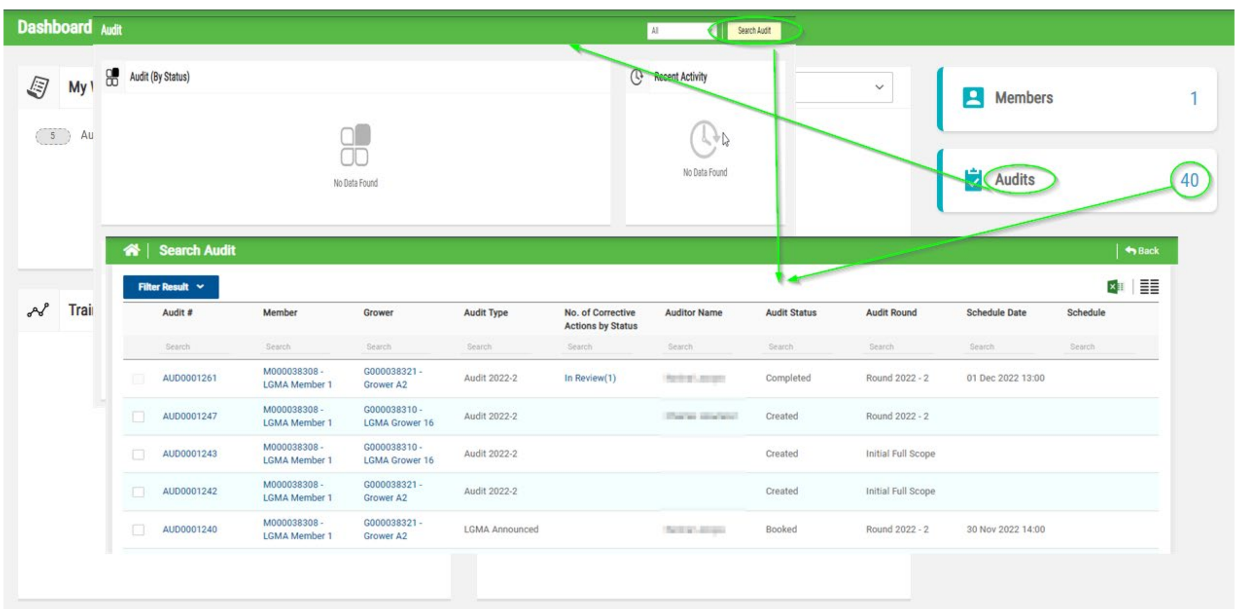
- Grower – you can view the growers that are associated to your member. You can also view the Valid From and Valid To dates. You can select a grower ID and then view the details for that grower.
- Audits –these are the Audits associated to the member. Each Audit will have a link to the Audits module 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

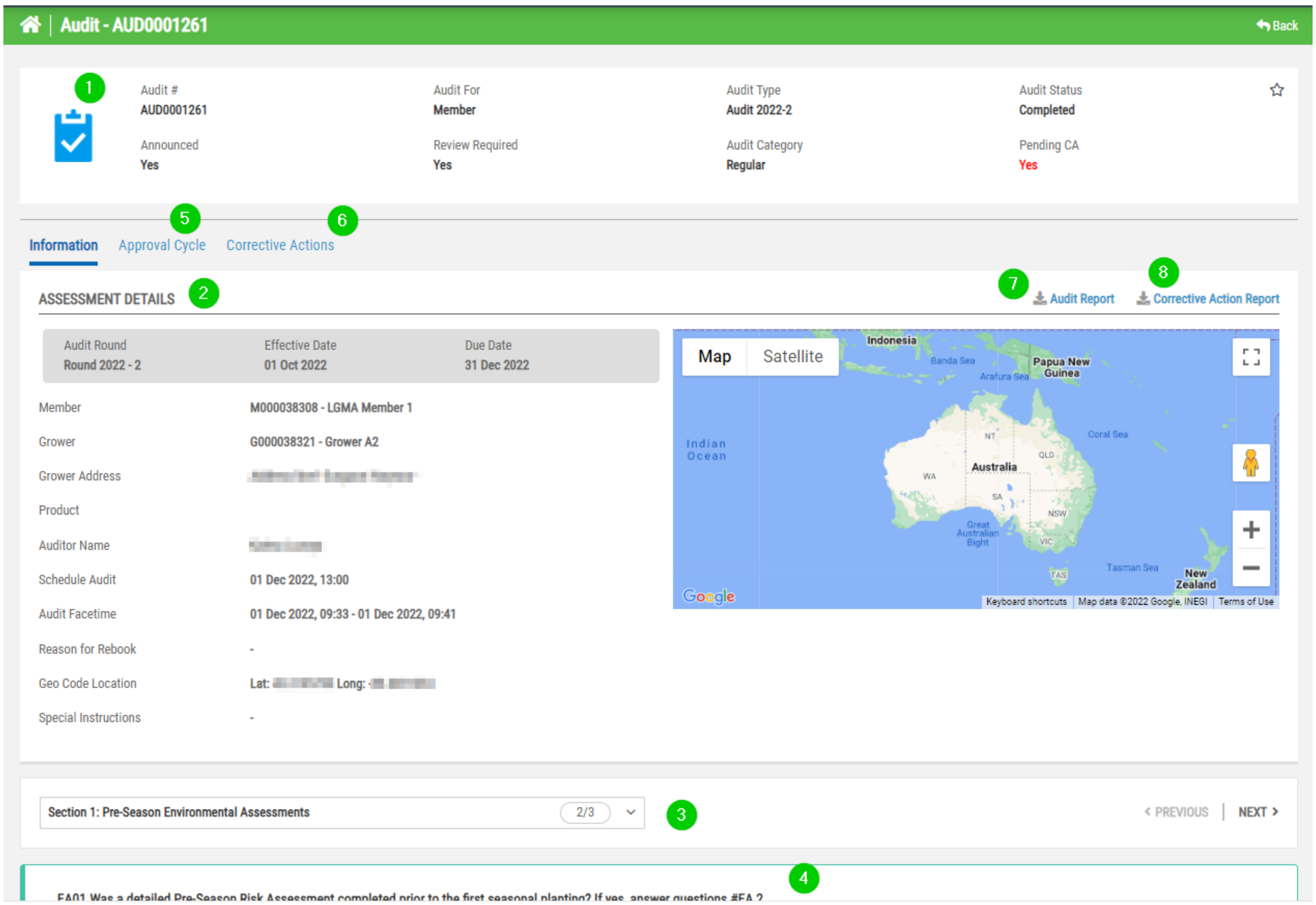
Within the Audit dashboard, you can select the Search Audit button, this will bring you to a list of all of your audits, you can also access this list by selecting the number from the main dashboard within the Audit button. Here you can sort/access your audits, view corrective action statues.



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

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

   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



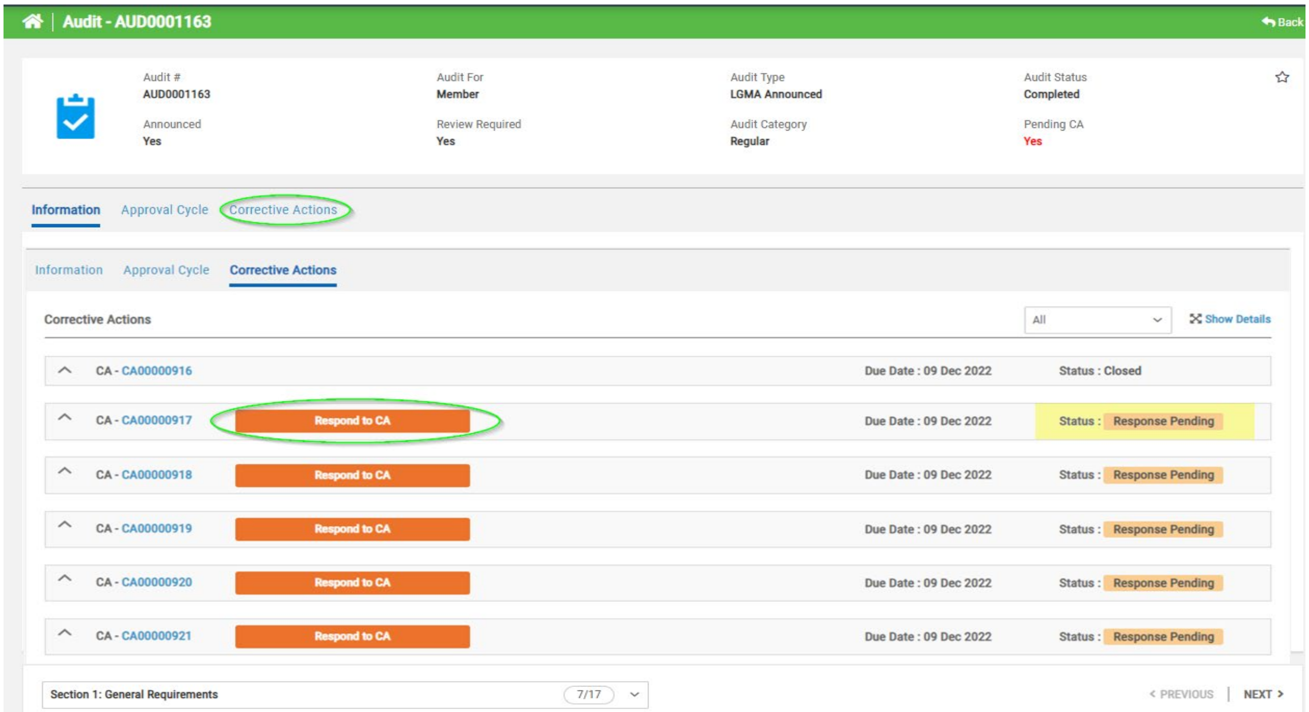
NSF Confidential

Corrective Actions

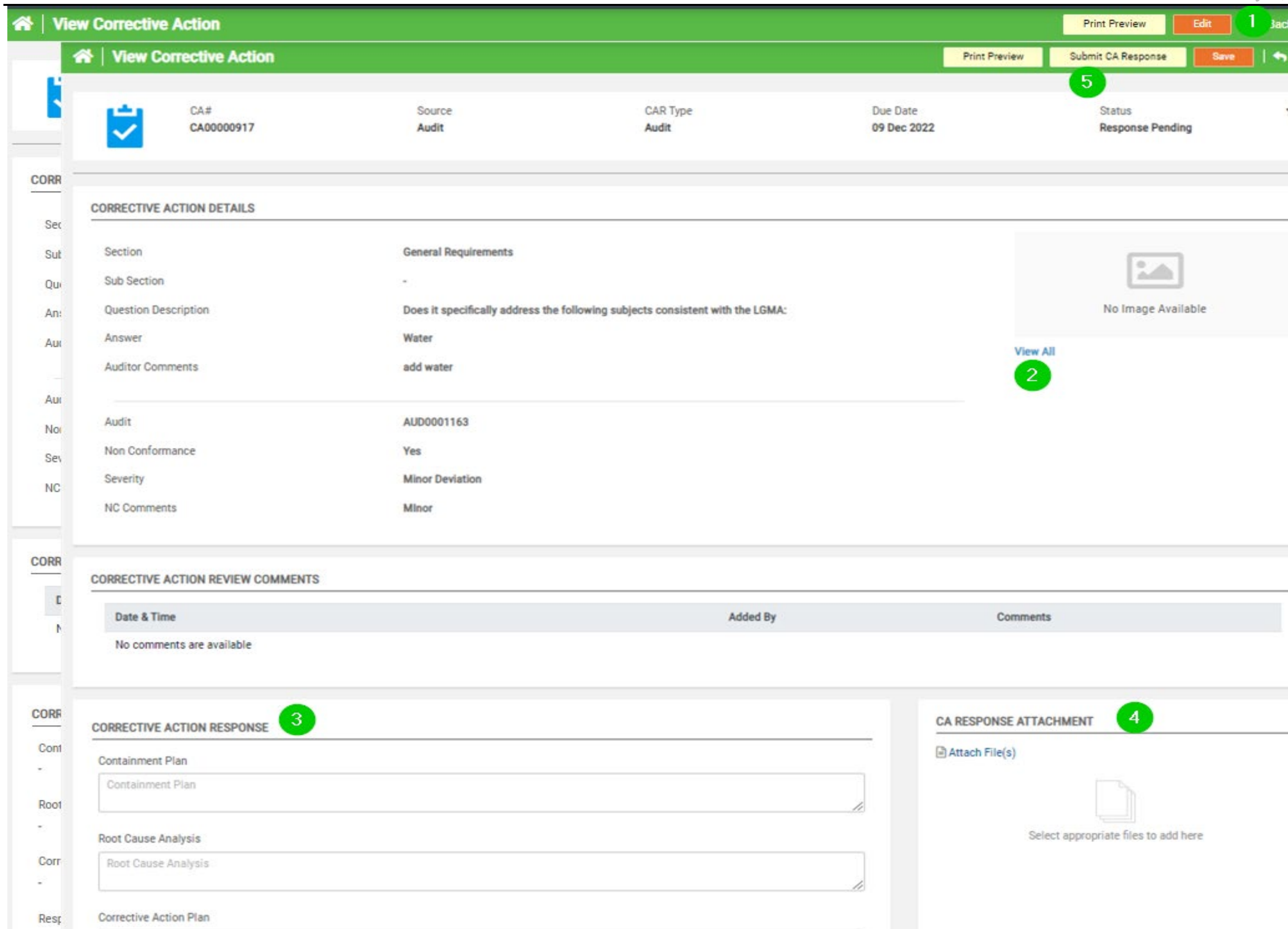
Once an audit has been performed and reviewed, corrective actions might be generated. An email notification will be sent indicating that action is necessary. You can access the corrective action in multiple ways:

- 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.



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



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 acccepted 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.