

# SQAS 2.0 User guide for assessors

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# **Table of Contents**

2	Introduction	. 3
3	The SQAS Member Portal	. 5
4	Open the SQAS Member Portal	. 5
5	Register your user account	. 6
6	Log in on the SQAS Member Portal	. 8
7	Pre-notifications for planned assessments	10
8	Planned assessments	12
9	The SQAS Assessor Software	14
10	Report invoices	26
11	Further information	28

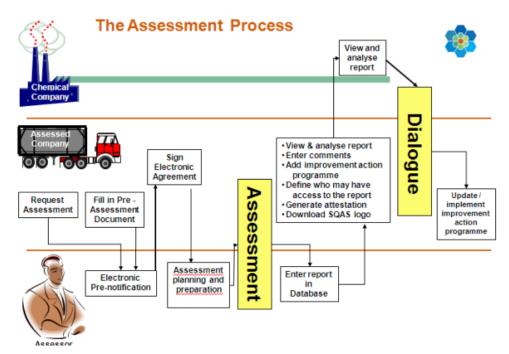


## **1** Introduction

This user guide is primarily intended for the assessors. The goal is to introduce them to the assessor functionalities provided by the SQAS 2.0 system.

If you have any questions, issues or if you need assistance after reading this document, do not hesitate to contact the SQAS Helpdesk. See the contact section of this user guide for more information.

## 1.1 The SQAS Assessment Process



The general working procedure is as follows:

#### 1. Company to be SQAS assessed

- Navigates to the PAD section of the SQAS member portal (<u>https://members.sqas.org</u>)
- Registers the user account (if no account registered yet)
- Completes the Online PAD
- Selects one (or more) assessor(s) to share the PAD and sends and automated e-mail notification
- Optionally: re-selects one (or more) assessor(s) to share a modified PAD and sends an automated e-mail notification.

#### 2. SQAS Assessor

- Gets an e-mail notification about the received (or modified) PAD
- Opens and evaluates the PAD in the SQAS Report Editor
- The assessor can modify the PAD.
- When the assessment is agreed, the assessor registers the pre-notification of the planned assessment.

#### 3. Company to be SQAS assessed

• Receives the pre-notification and electronically confirms it

#### 4. SQAS Assessor



• Imports the PAD in the report of the planned assessment

#### 5. The Assessment takes place

#### 6. After the assessment

- The SQAS Assessor submits the report
- The assessed company can
  - View the report and grant/deny access to customers.
  - $\circ \quad \text{Include comments in the report} \\$
  - o Upload an Improvement Program

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# 2 The SQAS Member Portal

On the SQAS Member Portal, accredited SQAS assessors have access to:

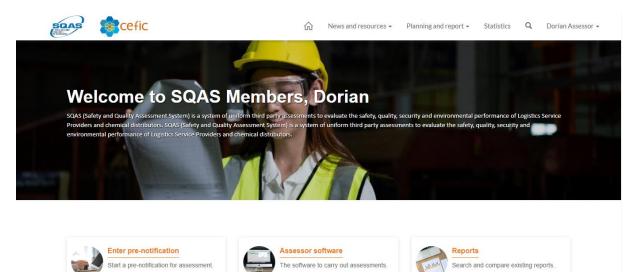
- Entering, viewing, and editing pre-notifications of planned assessments
- List of planned assessments
- List of assessed companies
- View and edit Pre-Assessment documents sent to the assessor
- Create and submit assessment reports
- Search and view assessor's reports
- Request access to other assessment reports
- Download the assessor software
- Viewing / updating assessor's contact information

# 3 Open the SQAS Member Portal

With the browser of your choice, navigate to the <u>www.sqas.org</u> website and click on the SQAS Member Portal in the top menu. Alternatively, you can navigate directly to the SQAS Member Portal by opening the following url: <u>https://members.sqas.org</u>.

<image of public website>

#### Homepage of the SQAS Member Portal:



When logged in, the following quick links are available on the SQAS Member Portal Homepage:

- Start a pre-notification for an assessment
- The software to carry out assessments
- Search and compare existing reports

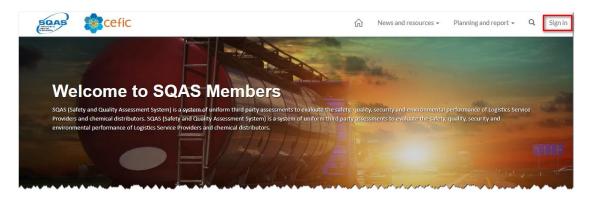
## 4 Register your user account

To secure the data that resides on SQAS 2.0 **Multi-Factor Authentication (MFA)** is enabled during the registration and sign-in process. MFA is a process in which users are prompted during the sign-in process for an additional form of authentication.

Before you can access the SQAS Member Portal, you will first need to create a user account.

If you didn't register your user account yet,

1. click on the "Sign in"-button on the SQAS Member Portal (upper right corner).



2. On the Sign in page, click the "Sign up now"-link under the Sign in button.

SGAS Abdrast Oktif Ar Statianity	
Sign in	
Sign in with your email address	
Email Address	
Password	
Forgot your password?	
Sign in Don't have an account? <mark>Sign up now</mark>	

3. On the User Details form, enter your e-mail address in the corresponding field. *Important: if you were a user of SQAS 1.0, use the same e-mail address.* 



#### 4. Click on **Send verification code**

< Cancel	
User Details	
Verification code has been sent to your inbox. Please copy it to the input box below.	
john.doe@microsoft.com *	
Verification Code	
Verify code Send new code	
New Password	
Confirm New Password *	
Create	

- 5. A verification code has been sent to your inbox. Copy it to the **Verification Code** field and click the "**Verify code**"-button.
- 6. Enter a password in the **New Password** field Note: The password must be between 8 and 64 characters and must have at least 3 of the following: a lowercase letter, an uppercase letter, a digit, or a symbol.
- 7. Enter the same password in the **Confirm New Password** field.
- 8. Click Create

After clicking "Create", the MFA-process is launched.

9. Click the "Send verification code" button.

< Cancel	
User Details	
Verification is necessary. Please click Send button Email Address	
ar	*
Send verification code	
Continue	



- 10. A verification code is sent to your inbox. Copy it to the "Verification code" field and click "Verify code"
- 11. Once the e-mail address is verified, you can click "Continue".

< Cancel													
User Details													
Verification code has been sent to your inbox. Please copy it to the input box below. Email Address													
*													
Verification code													
880369													
Verify code Send new code													
Continue													

After your user has been created, you arrive on the **profile** page

12. Enter your first and last name in the designated fields and click the Update button

SGAS Minister Minister Minister Minister	cefic	ώ	About us	Our network 🗸	News and resources -	Planning and report 👻	Statistics	Q	Profile name			
Home	> Profile											
Pro	ofile											
	-		Please provi	de some information	about yourself.							
	Profile name		The First Name and Last Name you provide will be displayed alongside any comments, forum posts, or ideas you make on the site.									
_	-		The Email Address and Phone number will not be displayed on the site.									
Profile	e		_		otional. They will be displayed	I with your comments and fo	rum posts.					
Favorite L&D			Your Info First Na			Last Name *						
			John			Doe						
			E-mail			Business Phone						
			john.	doe@microsoft.com		Provide a telephone nu	mber					
			Organiz	ation Name		Title			_			
mm	Marka A Marka Andrew Marka	vunu	Nr Nm	mannan	and mark products	man marken som	monn	m	NAM			

Afterwards you are redirected to the homepage of the SQAS Member Portal.

## 5 Log in on the SQAS Member Portal

To secure the data that resides on SQAS 2.0 **Multi-Factor Authentication (MFA)** is enabled during the registration and sign-in process. MFA is a process in which users are prompted during the sign-in process for an additional form of authentication.



If you already have a user account, navigate to <u>https://members.sqas.org</u> and **click the sign in** link in the top menu.

- 1. You can now **enter your credentials and click the sign in button**. After clicking the Sign in button, **the MFA-process is launched**.
- 2. Click the "Send verification code" button.
- 3. A verification code is sent to your inbox. Copy it to the "Verification code" field and click "Verify code"
- 4. Once the e-mail address is verified, you can **click "Continue"**.
- 5. Afterwards you are redirected to the homepage of the SQAS Member Portal.

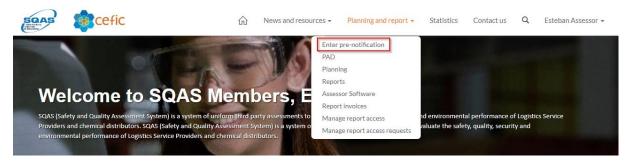
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# 6 Pre-notifications for planned assessments

In the Planning section of the SQAS system the assessor can register pre-notifications for planned assessments (including pre-notifications for remote assessments) and view/modify the existing pre-notifications in the SQAS system.

#### **Register pre-notifications for planned assessments**

Please navigate to <u>https://members.sqas.org</u> and log in. In the top menu, select "**Planning and report**" and click "**Enter pre-notification**" in the submenu.



The assessor must register a pre-notification for each planned assessment. The contact person and e-mail address are very important, because this person will receive a confirmation of planned assessment, with the invitation to electronically authorize the agreement:

	on for asses	sine	nı	
Company to be asse	ssed			
Company Name *				
Contact Name *			Contact Email *	
Company Address				
Company Zip			Company Location *	
Out Of Territory Assessment				
Company Country *				
Company Phone *				
Provide a telephone number				
lanned assessment				
Intermediate Assessment			Previous Report For Intermediate Assessment	
			Previous Report Por Interniteduate Assessment	
Road Transport	Including Food Section			
Intermodal Terminal				
Tank Cleaning				
Warehouse	Including Food Section			
Rail Transport				
Chemical Distribution	Core/Di		🗆 S	
	_ G		D.F.	
			End Date *	
Start Date * DD/MM/YYYY		<b></b>	DD/MM/mm	

The registered pre-notifications will appear on the public list of planned assessments. The actual assessment can only take place after the company to be assessed has authorized the electronic agreement.

After the assessment report is submitted to the SQAS database, the pre-notification will be archived, and the report will become available in the list of assessed companies.



#### **Register pre-notifications for remote assessments**

A remote SQAS assessment is a partial assessment which includes the part of the assessment which can be carried out remotely, for example via MS Teams. The remainder part of the assessment will be carried out on-site later.

The electronic pre-notification form contains a section labeled "Remote Assessment":

Remote Assessment	
Partial/Full Remote Assessment     Jm     (Full remote assess—ents are only allowed for "Office Only" companies. In this case, please, request the approval of the SQAS Manager)	
Remote Assessment Date	
DD/MM/YYYY HH:mm	
	)

Remote Assessment Completed Note: after the remote assessment has been marked as completed, this assessment will become visible in the list of reports.

also set the planned "Remote assessment date.

In this section the assessor must mark the assessment as a "Partial Remote Assessment". The assessor must

Please note that it is NOT possible to submit ('publish') a partially completed remote assessment report to the SQAS database: only fully completed assessment reports can be submitted and published on the SQAS database.

#### Marking remote assessments as "carried out"

After the remote part of the SQAS assessment, the assessor must indicate in the pre-notification of the planned assessment that the remote part has been carried out.

The assessor must mark the check box "Remote Assessment has been completed":

Remote Assessment
Partial/Full Remote Assessment     (Full remote assessments are only allowed for "Office Only" companies. In this case, please, request the approval of the SQAS Manager)
Remote Assessment Completed     Note: after the remote assessment has been marked as completed, this assessment will become visible in the list of reports.

After the assessor has marked the "Remote Assessment has been completed" check box, and has saved the Pre-Notification form, the remote assessment will become visible in the list of reports on the SQAS website.

However, it will not be possible yet to open and view the assessment report since the assessment report has not yet been submitted and published to the SQAS database.



# 7 Planned assessments

The list of planned assessments shows all your assessments. Intermediate assessments will be marked light blue, remote assessments are marked as green and out of territory assessments are marked with an orange color.

Planned assessments	
In the following list you'll find all the planned assessments. You can filter the list using the dropdowns provided on top of	the list.

Assessor	~	Module T		Status		~					
Planned asse	essments <del>-</del>							Search		Q OC	
Company Name	Company Country	Company Location	Status	Start Time ↓	End Time	Assessor	ls Remote Assessment	Intermediate Assessment	Out Of Territory Assessment		
Transport Company I	Belgium	Nivelles	Authorized	07/06/2023	07/06/2023	Dorian Assessor	No	No	No	e	•
Transport Company II	Belgium	Nivelles	Pre- notified	02/06/2023	02/06/2023	Dorian Assessor	No	No	No	6	•
Transport Company III	Belgium	Leuven	Pre- notified	01/05/2023	01/05/2023	Dorian Assessor	No	Νο	No	e	•
Transport Company IV	Belgium	Leuven	Pre- notified	21/04/2023	21/04/2023	Dorian Assessor	No	No	No	6	•
Transport Company V (Draft)	Belgium	Leuven	Pre- notified	20/04/2023	20/04/2023	Dorian Assessor	No	No	No	6	•
Transport Company VI	Belgium	Leuven	Pre- notified	14/02/2023	14/02/2023	Dorian Assessor	No	No	No	6	•
Transport Company VII	Croatia	test	Pre- notified	01/01/2023	01/01/2023	Dorian Assessor	No	No	No	e	•

## 7.1 Filter the list of Planned assessments

Filters are available to refine the list of planned assessments:

- Assessor: the dropdown displays all assessors. Select an assessor to use it as a filter.
- Module: Select a module to use it as a filter
- Status: filter the list based on the report Status

Complete one or more filters to use and click "Apply" to refine the list. A combination of filters is possible.

## 7.2 Search the list of Planned assessments

Use the **search box** on top of the list to filter the list by searching on specific text. To search on partial text, use the asterisk (\*) wildcard character. Click the search icon (Q) to display the search results.

### 7.3 Toggle between Planned assessments and All assessments

When opening the Planned assessments page, the list only shows the planned assessments. You can toggle between **Planned assessments** and **All assessments** by clicking the list icon ( $\equiv$ ).



You have the option to create, view or edit all these planned assessments:

- To create, click on the "Create"-button ( Create )
- To view, click on the company name or the "i"-icon (<sup>1</sup>) of the selected planned assessment. ٠
- To **edit**, click on the on the "edit"-icon ( •

#### 7.4 Filter the list of Planned assessments

Filters are available to refine the list of planned assessments:

- Assessor: the dropdown displays all assessors. Select an assessor to use it as a filter.
- Module: Select a module to use it as a filter •
- Status: filter the list based on the report Status •

Complete one or more filters to use and click "Apply" to refine the list. A combination of filters is possible.

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Planned assessments -							Search		۹	Create
Planned assessments	1									
All assessments								Out Of		
Company Name Country	Company Location	Status	Start Time ↓	End Time	Assessor	ls Remote Assessment	Intermediate Assessment	Territory Assessment		

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## 8 The SQAS Assessor Software

### 8.1 Online and Offline version

The assessor software can be used with or without an internet connection. Both versions are identical. The offline version uses the same technology and shares all functionalities.

## 8.2 Opening the Online SQAS Assessor Software

Please navigate to <u>https://members.sqas.org</u> and log in. In the top menu, select "**Planning and report**" and click "**Assessor Software**" in the submenu.



You will be presented with a loading screen while the software downloads all the data it needs. If the software is currently offline, this step will be skipped, and instead continue directly to the list, with data downloaded earlier from the SQAS internet database.

Active pre-assessment documents					Search list	9
Status	Company	Location	Created 🕶	Saved		
Pre-notified	Bearco	Antwerp	25-05-2023	17-04-2023	( ) (	View 🖉 Edit 🖻 Archive
re-notified	Cefic	Brussels	25-05-2023	13-04-2023	( ) (	View 🖉 Edit 🖻 Archive
re-notified	Easi	Leuven	10-02-2023	13-04-2023	( ) (	View 🖉 Edit 🖻 Archive
						« < <b>1</b> >
rehived pro-acc	essment documents				Search list	Q

Once loaded, the Assessor Software will show all active and PADs sent to your user.

Note that you also can navigate directly to <u>https://members.sqas.org/planning-and-report/assessor-software/</u> to open the Online Assessor Software.

While working with the online version of the SQAS Assessor Software, your changes are continuously saved and synchronized with the SQAS Database.

## 8.3 Download the SQAS Assessor Software for offline usage

To use the SQAS Assessor Software without an active internet connection, you will need to download the software on your computer.

This can be done as follows:

Once you have opened the online SQAS Assessor Software, you can install the SQAS Assessor Software app onto your computer.



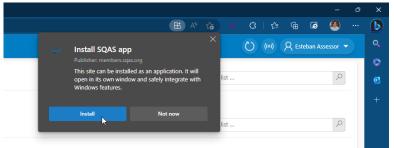
#### Using Google Chrome

- Ľ 1. Navigate to the top right of your browser screen and click the following icon: ← → C 
   members.sqas.org/Planning-and-report/assessor-software/ ۲. ☆ 🗯 🖬 🚨 🗄 B SQAS Assessor Software PADs 🔂 Reports ((0)) 🞗 Féaux Dorian 🔻 2. Click "Install": ← → C ( members.sqas.org/Planning-and-report/assessor-software/ 12 12 ☆ \* 🖬 😩 🗄 × Install app? SQAS Assessor Software PADs Féaux Dorian 🔻 SQAS Assessment reports in progress Q Cancel Install Status Report number Customer
- 3. The app should be automatically installed onto your device, for PC users a shortcut to the app has also been added to your desktop:



#### Using Microsoft Edge

- 1. Navigate to the top right of your browser screen and click the following icon:
- 2. Click "Install":



- 3. Choose whether to pin the app to your Windows start screen and/or add it to your desktop.
- 4. The app is now installed onto your device.

#### 8.4 Using the SQAS Assessor Software offline

Note that for offline usage, you can **only see and work with the reports you have already retrieved from the SQAS database while you were online**.

Before executing an SQAS assessment, it is important to open the SQAS Assessor Software while having an active internet. When online, the software will continuously download and store PAD's & Reports and their data locally.



Once done, you can work offline and open the SQAS Assessor Software from the Windows Start Screen or Desktop icon. The first time you open the software while having an active internet connection, the locally stored data will be synchronized with the server.

## 8.5 The PAD and Report list

After opening the SQAS Assessor Software you will arrive at the PAD (Pre-Assessment Document) section. This screen will show you all the PAD's which have been sent by the assessed companies to you as an assessor.

You can toggle between the PADs and Report list by clicking the appropriate button.

SQAS Assessor Software	PADs	🛱 Reports	SQAS Assessor Software	PADs	🛱 Reports

When working online, the list of PAD's and Reports is automatically refreshed. When no internet connection is available, a previously stored list of PAD's and Reports will be shown.

#### The PAD list

As an assessor you can not only open and view the PAD, but also edit it (New functionality in SQAS 2.0). Click the "View"-button ( view ) to open a PAD, click Edit ( dit ) to edit it.

Active pre-	assessment documents			Search list		9
tatus	Company	Location	Created 🔻	Saved		
re-notified	Easi Transport III	Nivelles	07-06-2023	07-06-2023	○ View	🖉 Edit 🖻 Archive
re-notified	Easi Transport II	Nivelles	06-06-2023	06-06-2023	○ View	🖉 Edit 🖻 Archive
re-notified	Easi Leuven Transport	Leuven	05-06-2023	05-06-2023	○ View	🖉 Edit 🔲 Archive
re-notified	Easi Nivelles Transport	Nivelles	02-06-2023	02-06-2023	○ View	🖉 Edit 🔲 Archive
re-notified	Easi Leuven	Leuven	25-05-2023	25-05-2023	○ View	🖉 Edit 🖻 Archive
re-notified	CONAP SCRL	Fiorenzuola d'Arda (PC)	25-04-2023	05-06-2023	○ View	🖉 Edit 🖻 Archive
re-notified	Transport company 3	ххх	25-04-2023	23-05-2023	ি View	🖉 Edit 🖻 Archive
						« ( <b>1</b> )
Archived p	re-assessment docume	nts		Search list		Q

#### The Report list

The Report list has different sections:

- "Assessment reports in progress": These are the newly planned reports (for pre-notified/authorized planned assessments) which the assessor has not yet worked on, and the reports the assessor is currently working on.
- "Submitted assessment reports": These are the reports which have been sent/submitted to the SQAS database by the assessor.

#### User guide for assessors

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Assessn	nent reports in prog	ress		Search list	٩,
tatus	Report number	Customer	Begin Date 🔻	End Date	
lew	91080	Brenntag UK - North East	13-03-2023	14-03-2023	🖉 Edit 🛛 🗙 Cancel
lew	90831	Panalon Multimodal S.A.	07-04-2023	13-04-2023	🖉 Edit 🛛 🗙 Cancel
lew	90832	Distributor 1	17-05-2023	18-05-2023	🖉 Edit 🛛 🗙 Cancel
lew	91147	Distributor 4	29-05-2023	01-06-2023	🖉 Edit 🛛 🗙 Cancel
lew	91146v2	Transport company 3	01-06-2023	01-06-2023	🖉 Edit 🛛 🗙 Cancel
lew	91159	Transport company 7	11-06-2023	11-06-2023	🖉 Edit 🛛 🗙 Cancel
					« < <b>1</b> > :
Submit	ted assessment repo	irts		Search list	م



## 8.6 Menu options and functions

The menu bar of the Assessor Software has the following options:

SQAS Assessor Software 🔋 🛱 Reports	(·•)
🗎 PADs 🔂 Reports	Used to navigate between the list of PADs and the list of Reports available for the assessor.
O	Click the "Refresh"-button to refresh the list of PAD's and the list of Reports
((o)) Active internet connection ((o)) No internet connection	This icon indicates that you have an active internet connection and that your data will be automatically saved in to the SQAS database. In case there is not active internet connection, the icon will be grayed out.

## 8.6.1 Options on the PAD-list screen

Search list	Use the Search-field to quickly find specific PADs in your list. Simply enter your search term and hit "Enter" or click the Search icon. Please note that you can clear the search results by emptying the search field and click the Search icon.
2 Edit	Press this button to edit the selected PAD
T Archive	Click this button to archive the selected PAD. After pressing "Archive", a pop-up message will ask for your confirmation
○ View	For Archived PAD's, click this button to show the content of the PAD. Please note that once archived, a PAD is no longer editable.
⊖ Restore	For Archived PAD's, press the Restore-button to reactivate the PAD. A pop-up message will ask for your confirmation.
Delete	For Archived PAD's, press the Delete-button to remove the PAD from your list. A pop-up message will ask for your confirmation.
	The list of PAD's is paginated. When applicable, use the arrows or page indicator to show more PAD's.

#### 8.6.2 Options on the Report-list screen

Search list	Use the Search-field to quickly find specific Reports in your list. Simply enter your search term and hit "Enter" or click the Search icon. Please note that you can clear the search results by emptying the search field and click the Search icon.
🖉 Edit	Press this button to edit the selected Report/PAD.
× Cancel	Press this button to cancel your report. A pop-up message will ask for your confirmation.
ত View	For submitted reports PAD's, click this button to show the content of the report/PAD. Please note that once submitted, a report is no longer editable.



Delete	For submitted reports, press the delete button to remove the report from your list. A pop-up message will ask for your confirmation.
	The list of PAD's is paginated. When applicable, use the arrows or page indicator to show more PAD's.



## 8.7 Editing an Online SQAS PAD

As an assessor it is possible to view or edit PADs that were sent to you.

## 8.7.1 Menu options

The menu bar of the Assessor Software (PAD) has the following options:

SQAS Assessor Software	🚯 English 🗸 📮 (iei)
自 PADs C Reports	By clicking either one of these buttons, you will return to the list of PADs or the list of Reports.
🚯 English 🗸 🗸	The dropdown menu can be used to switch between the available languages. By clicking on the "globe"-icon, the dropdown menu also unfolds.
ê	You can quickly save your input by pressing the save button. Note that the PAD info will also be saved automatically.
((o)) Active internet connection ((o)) No internet connection	This icon indicates that you have an active internet connection and that your data will be automatically saved in to the SQAS database. In case there is not active internet connection, the icon will be grayed out.



## 8.8 Editing an Online SQAS Report

As an assessor it is possible to view or edit reports after you have created a pre-notification for assessment.

## 8.8.1 Menu options

The menu bar of the Assessor Software (PAD) has the following options:

SQAS Assessor Software 🗎 PADs 🔓 Reports	😚 English 🗸 📮 🍥
會 PADs 意 Reports	By clicking either one of these buttons, you will return to the list of PADs or the list of Reports.
🚱 English 🗸	The dropdown menu can be used to switch between the available languages. By clicking on the "globe"-icon, the dropdown menu also unfolds.
Import 🕶	This dropdown menu can be used to import the PAD or Core questionnaire from another PAD/report.
<u> </u>	<b>Save</b> your input by pressing the save button. Note that the PAD info will also be saved automatically.
e	<b>Export the current report to a PDF file</b> , you can choose to export the complete report or a subsection.
	<b>Submit the report</b> . Note that this button is only active if the entire report has been filled in and the pre-notification has been approved.
((o)) Active internet connection	This icon indicates that you have an active internet connection and that your data will be automatically saved in to the SQAS database. In case there is not active internet connection, the icon will be grayed out.



## 8.9 Entering reports

After clicking on a report in the list of reports, the report will appear on screen:

QAS Assessor Software	📋 PADs 😭			🚯 English	🕶 Import 🕶 📮 📄 🖹 (**) 🞗 Esteban Assessor 🔹
npany: Easi	Location: Leuven	Report number: 91151	Status: New	Created: 31-05-2023	Saved: 31-05-2023
17/315	43	0.1.1 - Assessed Company			<b>Y (</b> )
Assessment Information and Scope	92				
0.1 Assessment Information		Company Name     This name will be shown in the assessment report		Easi	
0.1.1 Assessed Company	-	*Location (=Town/City)		Leuven	
<ul> <li>0.1.2 Assessor</li> <li>0.1.3 Activities Assessed</li> </ul>	J	*Country		Belgium	~
<ul> <li>0.1.4 Assessment</li> <li>0.1.5 Assessment dates and duration</li> </ul>	1	* Postal code		3000	
0.1.6 Scope of assessment - Core Activit	ty –	* Postal Address		Havenkar	nt 6
0.2 Assessed company profile	•				
0.3 Transport services	•				
0.4 Tank cleaning	•	* Phone		+32 123 4	15 67 89
🗈 Status	~	* Website			
Transport Services	30	Please obtain from the Assessed Company 3 persons (with the	correct email addresses) who will get access to the rep	ort	
Tank Cleaning	232	1. Contact Person			
General Comments	~	* Name		Esteban B	Seerens
		* Email		e.beeren	s@easi.net
		2. Contact Person Register this person if you want him/her to receive a copy of the assessmen	t report		
		Name			
		Email		email	
		3. Contact Person Register this person if you want him/her to receive a copy of the assessmen	t report		
		Name			

On the left side the table of contents of the report is shown. You can select the assessment information, questionnaire sections, chapters, or general comments by clicking the appropriate menu option. On the right side the questions of the selected section are shown.

The report editor shows a progress bar, which indicates the percentage of report questions the user has completed.

The section list shows the numbers of questions to be answered and a check sign as the indication of which sections already have been completed.

### 8.10 Importing PAD or Core

The scope of the assessment will be based on the Pre-Assessment Document ("PAD"). After the import of the PAD, the appropriate questionnaire sections and/or questions are activated in the assessment report.

In the menu bar of the SQAS Report Editor you can press the 'Import' menu option and select "Import PAD" to select and import the completed Pre-Assessment Document ('PAD') of the assessed company:



In case of multi-site assessments, you also can use the "Import Core" option to import Core part of another report. The core of that report will then be imported into the new SQAS report. The core import option will be enabled only under specific conditions, core import is only possible for companies which are subsidiaries.



## 8.11 Answering questions

After clicking on a questionnaire section, the following screen will appear:

QAS Assessor Softwa				🚯 English 👻			२ Esteban Asse	
npany: -	Location: -	Report number: 91141a	Status: Active	Created: 08-05-2023	Saved: 18-05-20.	3		
9/x31	2.3	7.1 Equipment Specification					0	00
Assessment Information and Sco	spe 🔳	7.1.1. Does the purchasing procedure include:						
🔁 Rail Carrier		Check for the existence of a procedure and responsibilities for pur	irchasing, leasing or renting.					
D 6. Subcontracting of Transport	~	7.1.1a customer demands?			O Yes	O No	() N/A	E
🗁 7. Equipment	3	7.1.1b QSSHE requirements?			⊖ Yes	⊖ No	O N/A	(1
7.1. Equipment Specification     7.2. Equipment Inspection and     rolling stock	d Maintenance of all	7.1.2. Are there written specifications for the purchase or leas Check the specification for a recently purchased or leased equipm			⊖ ¥es	O No	⊖ N/A	(
<ul> <li>8. Behaviour Based Safety (BBS programme) and Training</li> </ul>	5 or equivalent 🛛 😕	7.1.3. Are new delivered locomotives and wagons (purchased Ask how this is done (checklist used?) and by whom. Verify from a			⊖ Yes	O No	O N/A	(
9. Security in Transport	0	Public note						
10. Operating Procedures and I	interfaces 🙁							
11. Order Process and Operation	ons 🙂	Private assessor comment						1
12. Specific types of services at	nd activities	Private assessor comment.						
13. Site Inspection	•							
🗅 General Comments	4	Attachments +						

The answering of the questions is done by selecting the Yes, No or N/A answer box. Only the available answer areas are selectable. Required questions are marked with an asterisk (\*).

The question comments can be entered for each question answer by clicking on the Comments button on the far right of each question.

For some questions, comments are mandatory. The insertion of comments is mandatory for questions with N/A answers and questions with a "Comment is required" indication.

If a certain section is completed (all questions are answered) then this is made visible in the questionnaire by means of the section completeness indication (check sign).

The question guidelines are integrated in the SQAS Assessor application in the available languages. The guidelines are shown underneath the questions. In the profile menu you can select to show the full guidelines, only show an excerpt, or hide the guidelines.

Import 🔻	📮 🖻 🗄 (0) 🛛 Assessor Dorian 🔻
d: 07-04-202	Settings
	Show Guidelines:
	Full 🗸
	Logout

#### 8.11.1 Adding Public notes or Private assessor comments

When applicable, you can click the "Details"-button ( ) to add a Public note or Private comments.

- Comments entered in the "Public note"-field will be visible to all users who have access to the submitted/active report. For some questions the public note is mandatory when a question is scored N/A. In that case the comment field will be visible automatically (no need to click the details button).
- Comments entered in the "Private assessor comment"-field remain visible only for the assessor. Private assessor comments are a new functionality in SQAS 2.0.



.1.1.Is the restriction for non-smoking respected? It has to be clearly indicated that smoking is prohibited and that this is also followed and controlled. Check that there are no cigarette butts on the floor of the areas where smoking is prohibited.	⊖ Yes	○ No	⊖ n/a	41h
Public note				
				li
Private assessor comment				
				1

#### 8.11.2 Adding attachments

To support your answer, you can add one or more attachments by clicking the "Details"-button.

With the details section expanded, click "**Attachments** +" and select one or more files on your computer to add to this question.

Once added, you can remove an attachment by clicking the red X.



Please note:

- Before you can add attachments, you need to score the question first by selecting Yes, No or N/A.
- The maximum size allowed for the file is 128 Mb

## 8.12 Exporting the report to PDF

You can export the current report to PDF using the icon (៉) in the menu bar.

In the "Export PDF"-screen, you can select the items you want to export, and click "Yes"

Company info	
General information	
Questionnaire info	
Core Questionnaire	
Specific Questionnaire	
Questionnaire Guidelines	
Question comments	
Include Question Comments	
Include Private Assessor Comments	
Add Empty Mandatory Comment Box	
General comments	
Comments of Assessor	
Comments of Assessed Company	
	Yes

*Important note*: Once all items have been exported, the PDF will open in **a pop-up window**. It is possible that this is **blocked by your browser**.

#### To unblock this, follow these steps: (For Microsoft Edge and Google Chrome)

An extra icon (<sup>1</sup>) will appear in the address bar. Click on it and select "Always allow pop-ups and redirects from https://members.sqas.org". Click "Done" afterwards.

← → C	t/assessor-software/ 🕞 🖻 🖄 🖈 🗖 🏩 🗄
SQAS Assessor 🖹 PADs 🛱 Reports 🐼 Software Company: Panalon Multimodal S.A.Location: Constanti (Tarrage	Pop-ups blocked: Eng blob:https://member4afd-877e-7b9467b1d4dc Always allow pop-ups and redirects from https:// members.sqas.org Continue blocking Saved: 08-05-2023
409/409 10	Manage Done

From now on, all pop-ups from the SQAS Member Portal will be allowed. The first time, you will need to select the "Export PDF" button once again to get the PDF.

### 8.13 Spell checker

The Online SQAS PAD Editor relies on the built-in spell check of your browser. General note: By default, all spell checkers will always ignore words typed in capital letters. For the most popular browsers, you can activate the spell check as follows:

# easi

## 8.13.1 Google Chrome

- Click the Settings and more (three-dotted) button in the upper right corner and select **Settings**. In the settings menu, select **Languages**.
  - Alternatively, open a new tab and go to chrome://settings/languages
- Next to "Check for spelling errors, enable the toggle.
- Now spell check is enabled, or if it was already enabled, Chrome displays additional options for this feature.
- You can choose between "Basic" and "Enhanced" spell check.
  - **Basic spell check**: Chrome or your operating system provides the spell check. It doesn't send the text you enter in your browser to Google
  - Enhanced spell check: this spell check is used in Google Search. It sends the text you enter in your browser to Google for improved spelling suggestions.
     We do not encourage to use this option.
- You can select the languages you want Chrome to check the spelling
- Click **Customize spell check** to add or remove words to your personal dictionary.

## 8.13.2 Microsoft Edge

- Click the Settings and more (three-dotted) button from the top-right corner.
- Click the Settings option and click on Languages.
   Alternatively: open a new tab and go to edge://settings/languages
- Under the "Use writing assistance" section, choose between "Microsoft Editor" and "Basic" spell check
  - Microsoft Editor provides enhanced grammar, spelling, and style suggestions. Data is sent to Microsoft for processing.
  - $\circ$   $\;$  With Basic spell check, data is processed locally and is not sent over the internet.
- Under the "Use writing assistance" section, turn on the toggle switch for the languages you want Microsoft Edge to check spelling. If the language of your choice is not available, you will need to add it first using the "Add languages"-button.
- Under the "Customize dictionary" section, you can add or remove words to your personal directory.

### Other browsers

• Check the settings / languages section on the browser of your choice to enable or disable spell checking.

# 9 Report invoices

Once a year you will be asked to approve all your reports for invoicing. You can do this under the **report invoices section** (Planning and report\Report invoices).

A list report invoices to be approved will be shown. Select the reports you want to approve and click the green "Approve"-button.

If you choose to decline one or more reports, select them, and click "Decline". In that case, please contact the Cefic SQAS Invoice Responsible to explain your dispute.



Report invoices to be approved			Status		✓ ✓ Search list	<i>ب</i>		
	Report number	•	Assessor	Customer	Location	Assessment Date	Submitted Date	Status
	90826		Esteban Assessor	Easi	Leuven	30/12/9999	-	Submitted for Approval
	90827v2		Esteban Assessor	Test	Test	30/12/9999	-	Submitted for Approval
	90828v4		Esteban Assessor	Easi Test EBEE	Leuven		25/05/2023	Submitted for Approval
								Selected 0/3 items.
								Approve Decline

easi

# **10 Further information**

If you need any other information, don't hesitate to contact us.

### **10.1 For questions**



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28/ 28