



SBP Audit Portal

User Guide

Sustainable Biomass Program
sbp-cert.org



Version 1.2

Formal status of document: Active

For further information on the SBP certification system and to view the full set of documentation see

www.sbp-cert.org

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Document history

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In the case of inconsistency between translations, the official English language version shall always take precedence.

SBP welcomes comments and suggestions for changes, revisions and/or clarifications on all of its Standards documentation. Please contact: info@sbp-cert.org

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Background

The SBP Audit Portal is a place for all SBP Certificate Holders (CHs), SBP accredited Certification Bodies (CBs) and SBP certification applicants to manage the whole certification process. The Portal enables SBP CHs and applicants to complete the Supply Base Report in-system by completing smart checklists, submitting them for review by their CB and tracking the progress and schedule of CB audits, as well as reviewing certificate details. The Portal also enables SBP CHs to connect to other CHs for the purpose of data exchange. Through the Portal, CBs can manage their SBP CHs, track audits and non-conformances, and complete SBP audit reports directly in-system using online forms.

There are two systems: Test and Live. The URLs are as follows:

Live	https://portal.sbp-cert.org/
Test environment	https://sbp.chainpoint.com

The Test system account can be activated by contacting portal@sbp-cert.org.

1. Access to SBP Audit Portal

The SBP Audit Portal can be accessed at <https://portal.sbp-cert.org>.

Use of the SBP Audit Portal is mandatory for preparing SBP audit reports (Public Summary Report (PSR)) and SBP Supply Base Reports (SBR) for all SBP evaluation audits. SBP Audit Portal shall also be used by Certification Bodies to manage certificates.

1.1 Applicant access

SBP certification applicants are granted access to SBP Audit Portal after their Certification Body has registered them as official applicant in the Portal. An automated email will be sent to the primary contact person of the applicant company, which includes login details to the Portal, username and instructions to set the account password and a link to sign SBP Trade Mark Licence Agreement (TMLA). SBP TMLA can also be signed using this URL: <https://sbp-cert.org/sbp-trade-mark-licence-agreement/>. The applicant account will be automatically upgraded to Certificate Holder account after the Certification Body has issued the certificate.

1.2 SBP Certificate Holder access

All existing SBP Certificate Holders (CHs), active and suspended, have access to the Portal.

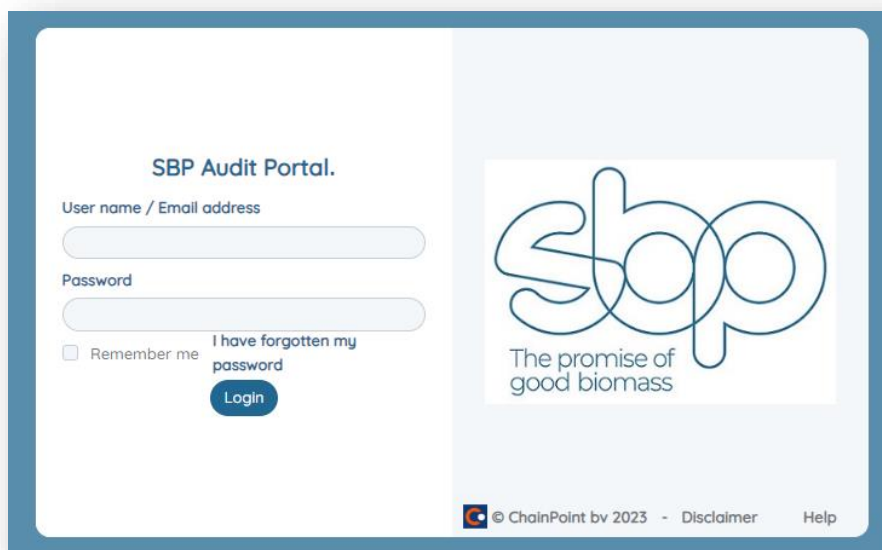
Please send an email to portal@sbp-cert.org if you do not have access to your Audit Portal account. An email will then be sent by the system to the primary contact person of the CH, which includes login details to the Portal, username and instructions to set the account password. The primary contact person will be the admin user for the company. Each CH can add additional system users to the Portal.

1.3 Certification Body access

All accredited SBP Certification Bodies (CBs) have access to the Portal. The primary contact person of the CB will be the admin user. Each CB can add additional system users to the Portal.

1.4 Login procedure

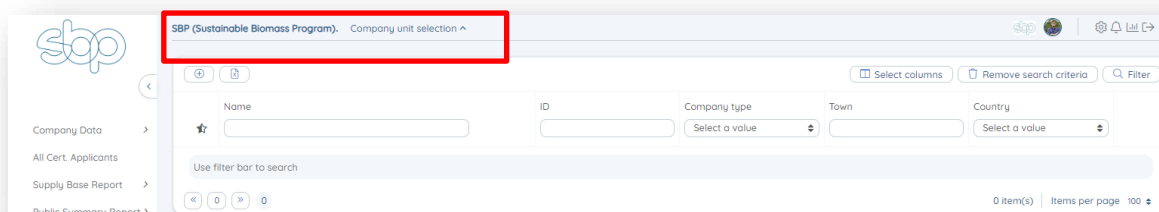
Since the system is web-based it can be accessed any place, anywhere provided an internet connection is available. After having entered the URL portal.sbp-cert.org, the login screen below will be shown.



The user must enter the username/email address and password provided. Each company can have multiple internal users of the system. If desired, username and password data can be stored on the computer by clicking the option 'Remember me on this computer'. For safety reasons, the user must request a new password after three unsuccessful attempts of using the 'I have forgotten my password' link.

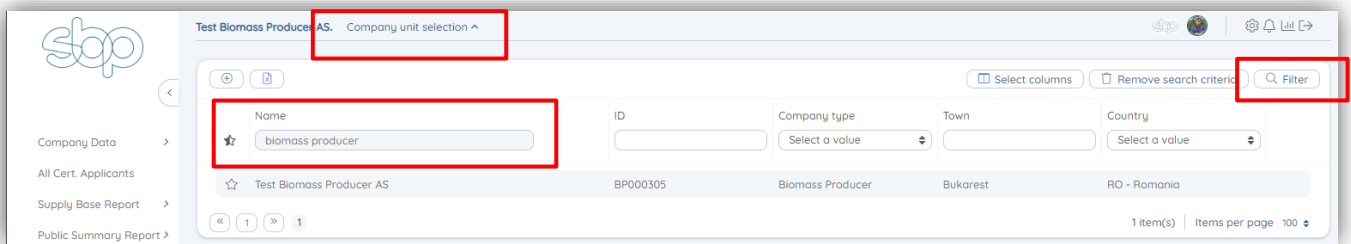
1.5 Company selector

The company selector is only available for users managing multiple accounts/certificates. This means Certificate Holders or Certification Bodies who manage multiple accounts with one login email can switch between accounts by using this functionality. The company selector is located as shown below:

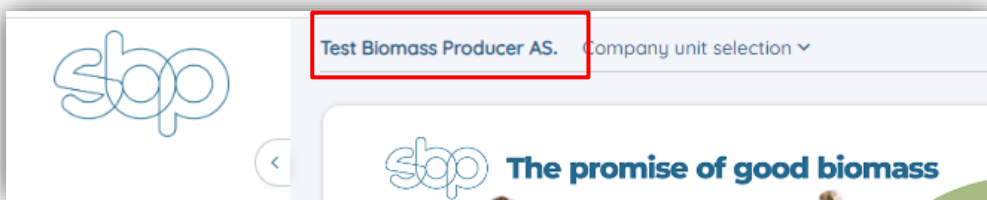


In cases where the user is managing multiple accounts, the company name in use is shown. To change the company, click on the selector and search for the company that you want to switch to. You can use search by company name, company type or country to find the company.

To switch to another company, click on the company name – this will expand the company selector. Then enter the company name and hit 'enter' or click on the 'Filter' button:



You have successfully switched the company if the company name in the selector has changed:



To switch back to the main company, simply click on the SBP logo on the top left corner at any time.

Certification Bodies need to use this functionality to work with their SBP Certificate Holders.

2 User management

2.1 User authorisation roles

Each user in the system has a specific authorisation role assigned.

SBP Certificate Holders have two different authorisation roles available to them:

- **CH Admin** – this is an admin user with permission to add other users to the Portal
- **CH User** – has the same permissions as the CH Admin, but cannot add any new users to the system

By default, all the primary SBP contact persons for the Certificate Holders are granted 'CH Admin' role status. This is an admin role, that allows the user to add other users and contacts to the system. User roles can be changed by the admin user.

SBP Certification Bodies have three different authorisation roles available to them:

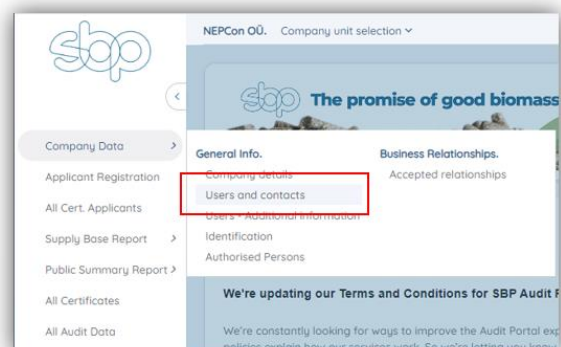
- **CB Admin** - this is an admin user with permission to add other auditors accounts to the Portal. The CB Admin user can also change the authorisation roles for all existing users. Note that the CB Admin user, by default, cannot conduct report reviews, for that purpose, the user must be allocated a second role – 'CB Report Reviewer' role.
- **CB User** – this is a regular auditor account. The user cannot add new users and cannot review audit reports.
- **CB Report Reviewer** – the same as 'CB User' but in addition has permission to review Public Summary Reports internally before they are submitted to CH review.

2.2 Overview of users

To get an overview of all the users and contacts registered with the company, navigate to the **Company Data** menu and click **Users and contacts**.

This opens a page with all the users and contacts for the organisation. NB! Remember to check which company's account you are currently using from the company selector.

To view user/contact details, click on the relevant row. Not all contacts in the system have an associated user account – it is possible to just add a contact to the system. User records have a 'Username'; contacts without a user account do not.

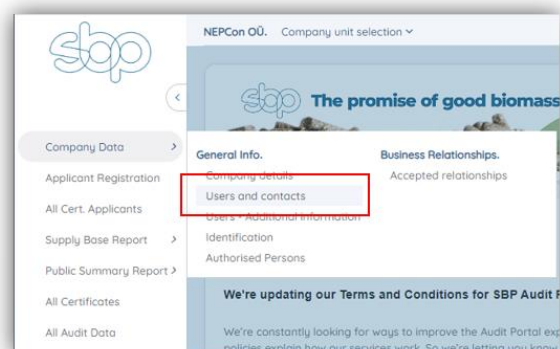


All active users shall have at least one **Authorisation role** selected (see section 2.1 for authorisation role details).

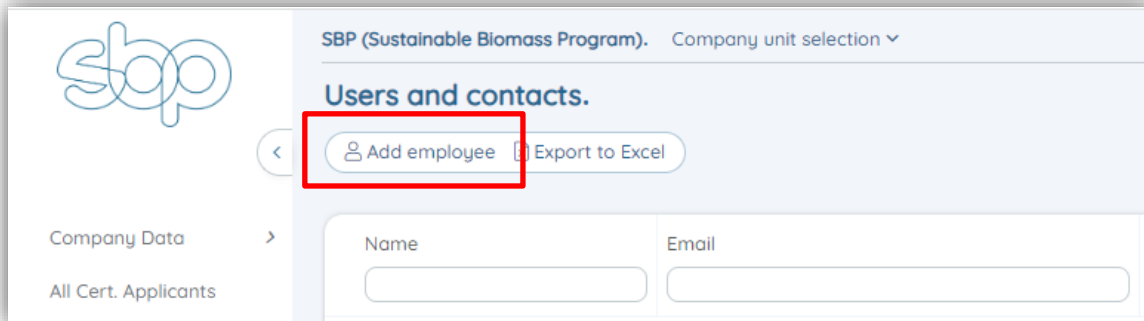
2.3 Adding new users

To add a new user, navigate to **Company Data** menu and click **Users and contacts**.

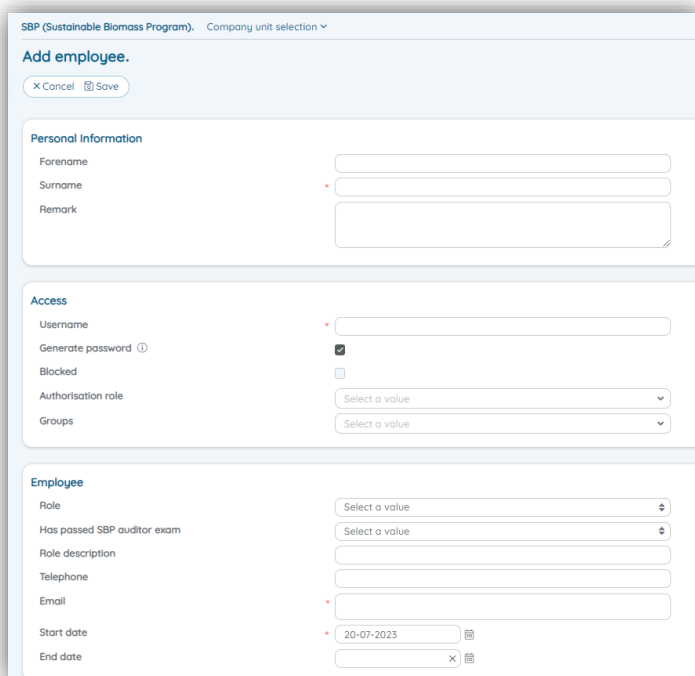
This opens a page with all the users and contacts for the organisation. NB! Remember to check which company's account you are currently using from the company selector.



To add a new user or a contact, click **Add employee** button.



This opens a new window where the user details need to be filled in:



Fill in all required fields in minimum and choose the 'Authorisation role'. Without the authorisation role, the user will not be able to use the account.

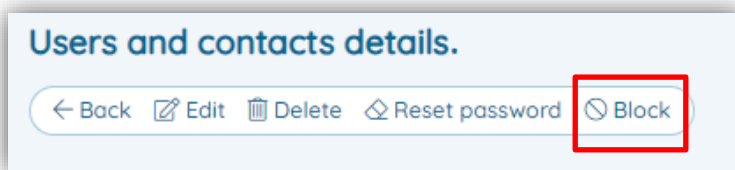
The last section, 'Employee' details include role, role description, phone, email address and user account's activation/deactivation dates (start date/end date). This means you can add a user for specific time period if necessary. If you do not want to limit the user account's validity period, just leave 'end date' blank and save the form. "Primary" role is only assigned to the main SBP contact person of the company and this will also appear on the public SBP website. Note that only one primary contact can be assigned for the company.

Employee

Role	Select a value
Role description	
Telephone	
Email	*
Start date	* 17-09-2020
End date	x

2.4 Disabling users

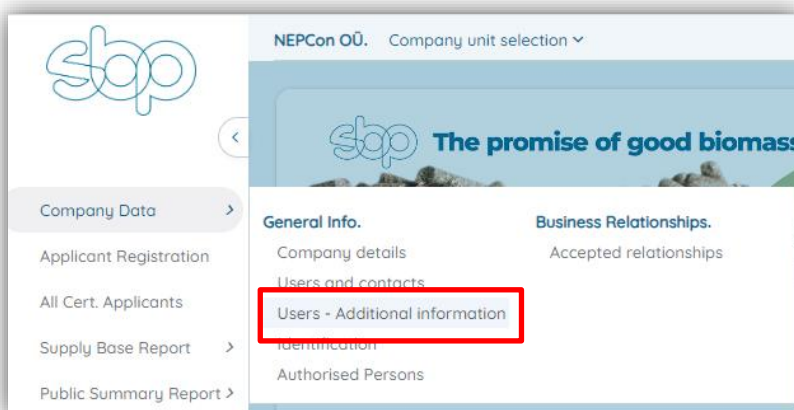
Only the admin user can disable users. To disable the user, navigate to the **Users and contacts** menu and open the user profile that you want to disable. On the top menu, click on the **Block** button.



2.5 Additional user settings for CBs

Certification Bodies have additional settings available for their auditor accounts. This includes limiting specific auditor access to certain geographical regions and defining auditor qualification description, so that the auditor's qualification is automatically filled in the audit reports.

Additional user settings can be accessed in the 'Users – Additional information' menu:



After opening this section, a list of all users is displayed. To set these additional settings for the user, please open the user and click 'Edit' button.

By default, new auditor user accounts have access to all CB's clients in all regions. To limit that, change the default value '**User can see all Countries**' from 'yes' to 'no' and add countries which clients are visible to this auditor account manually.

Edit Users - Additional information.

X Cancel Save

Users - Additional information

Auditor Name

User can see all Countries: No

Countries: Estonia, Latvia

Qualification: Test Auditor has an extensive experience in SBP auditing across three Baltic countries. He has carried out over 300 audits since 2015. He is also qualified FSC, PEFC and SFI Chain of Custody and Forest Management auditor.

“Qualification” section allows users to set the qualification to a default value. In that case auditors do not need to manually enter their qualification in the Public Summary Reports (PSR). Note that users can still edit the qualification description in the PSR if necessary.

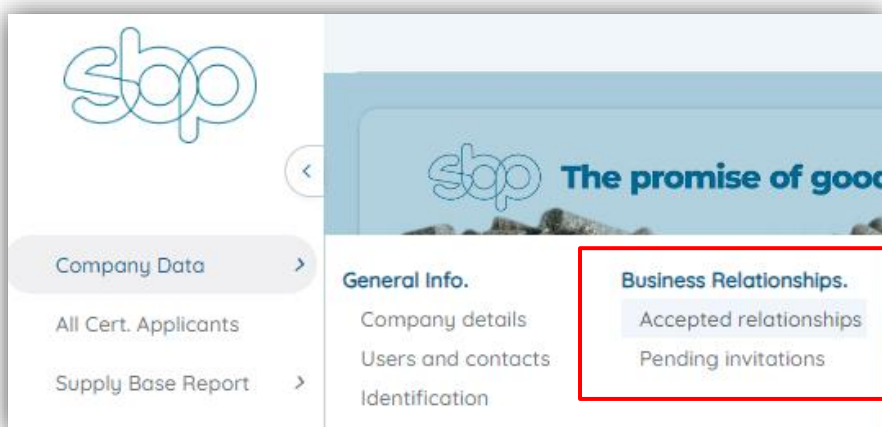
3 Business Relationships

A Business Relationship (BR) concept in the SBP Audit Portal is similar to the Business Relationship in the Data Transfer System (DTS), although for the time-being these two systems are not connected. A Business Relationship is required between a SBP Certificate Holder (CH) and the Certification Body (CB) – this defines the access permissions for the CB. This BR is automatically created by the system at the time when the CB registers new certification applicant.

Optional Business Relationships can also be created between CHs. This connection enables companies to run aggregated data reports on the Supply Base Report data. For example, an End-user can connect to their suppliers to run a report on the SBR data and export their supplier's SBR data to Excel for data analysis.

3.1 Overview of Business Relationships

To view all existing Business Relationships, click on the **Company Data** menu. This opens a submenu, where you can see “Business Relationships”.

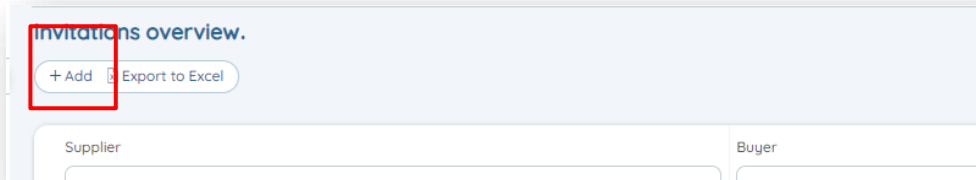


Business Relationships are divided into two:

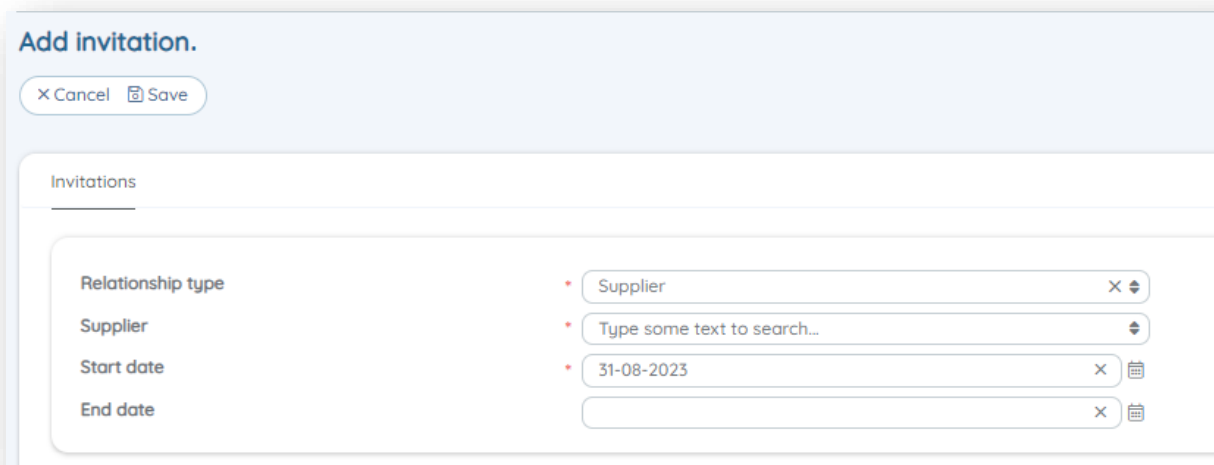
- **Accepted** – Business Relationships that are already established
- **Pending invitations** – either incoming or outgoing invitations that are not yet accepted

3.2 Adding new Business Relationships

To add a new Business Relationship, click on the “+Add” button in the **Pending invitations** page, which opens a new page, where you can add the details.



After clicking **Save**, a new confirmation window appears, where you can add custom invitation text and submit the invitation. This will trigger an email notification to your business partner.



The screenshot shows the 'Add invitation' form. At the top left, the text 'Add invitation.' is displayed. Below it, there are two buttons: 'Cancel' and 'Save'. Below the buttons, there is a section titled 'Invitations' with a list of fields: 'Relationship type' (dropdown menu), 'Supplier' (search field), 'Start date' (date field), and 'End date' (date field).

Your customer needs to accept the Business Relationship invitation before the company is added to the Business Relationships list.

To accept the invitation, open the invitation by clicking on the row, then review if all the details are correct and hit **Review** button.

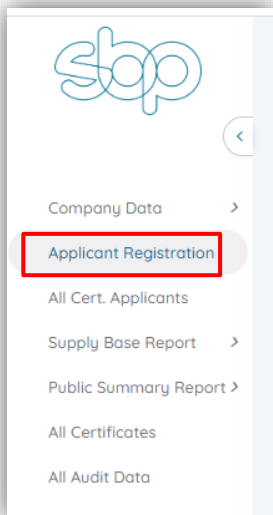
Status history is available on all records in the system and it includes full activity history, including date stamp, user making the changes and all changes to individual fields (old field value and new field value).

4 SBP certification applicants

All SBP certification applicants shall be registered through SBP Audit Portal by the Certification Body. This requirement also includes registering of re-assessments and scope change audits for those companies already certified.

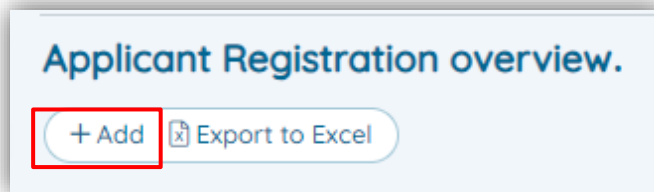
All Portal users will always see a list of currently active SBP certification applicants, this also includes companies applying for re-assessment or scope-change audits.

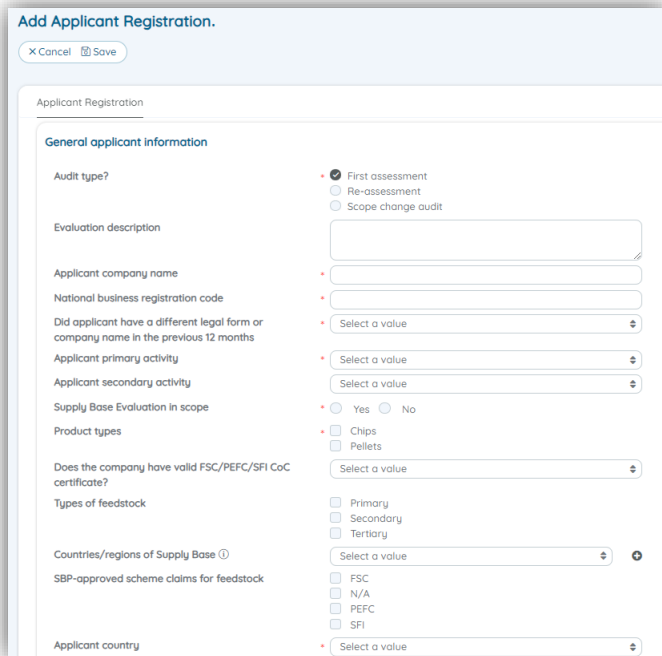
4.1 Registering new certification applicant



New certification applicants, re-assessments and scope change audits can only be registered by the Certification Body (CB). To register a new application, log into the Portal and navigate to **Applicant Registration** menu.

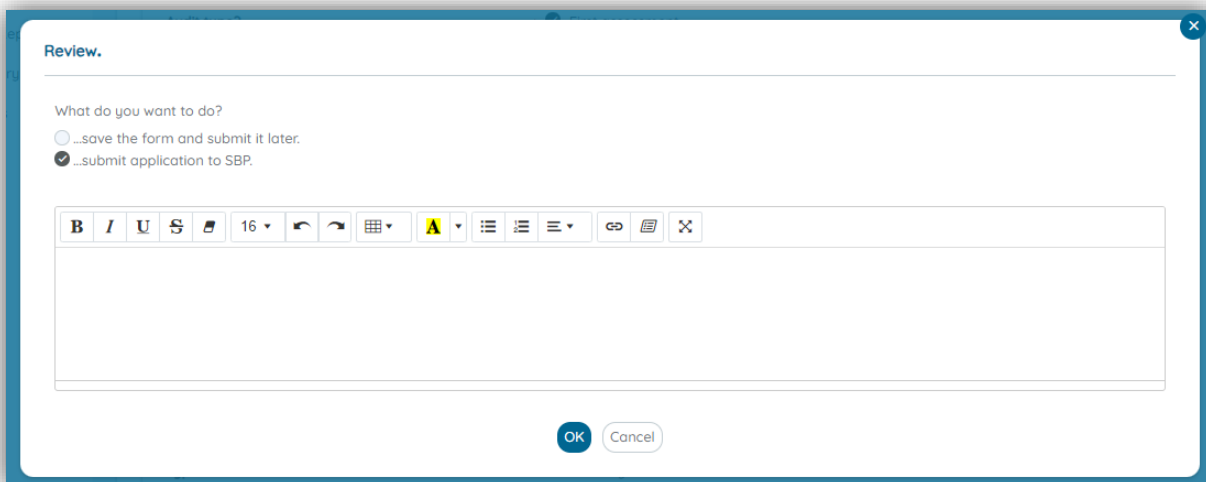
This opens a page with a full overview of all applicants registered by the CB. To add a new applicant, click **+ Add** button.





The certification registration form shall be completed by the CB in cases of a main evaluation audit, re-assessment or scope-change audit. In the case of the first assessment, the applicant company will receive login details to the Audit Portal after the application has been confirmed by SBP. Where the application is made for re-assessment, the CB needs to select the existing company from the system as the Certificate Holder is already a system user. In addition, for re-assessments, the system pre-fills all fields based on the existing data.

Next, click **Save** and choose from the options to submit the application to SBP or just save and submit later. You can also add a message (optional) for the application reviewer.



If you submit the application to SBP, then the form is saved and can be reviewed at any time from the Applicant's overview page. You can also track the status of the application – after submitting the application, it will appear as “Submitted” until it has been confirmed by SBP. In some cases, it is also possible that the application is withdrawn due to incorrect or missing information. In that case, the CB should review the rejected application, make corrections, and submit it again. After the application has been confirmed by SBP, the status will be updated to “Confirmed”.

Approved applications will be visible for all companies until the companies receive their SBP certificate, or they are older than 15 months and still not certified or the application is withdrawn.

4.2 Applicant access to the portal

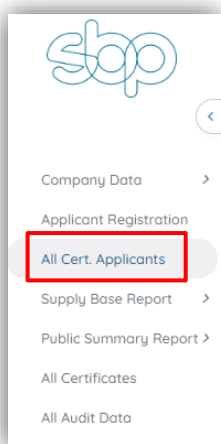
After the application has been confirmed by the SBP, the applicant company is added to SBP Audit Portal – the person indicated on the application will receive an invitation email to the system. The first welcome email also includes a link to the applicant company to sign a Trade Mark Licence Agreement with SBP.

All applicants can log into the Portal and track their certification progress, Biomass Producer applicants can, in addition, start preparing the Supply Base Report (SBR).

4.3 Withdrawing applicant

For variety of reasons, it is possible that the applicant company decides to stop the certification process and withdraw the application. In such cases, the CB should contact SBP to withdraw the application, after which the company is removed from the public applications list.

4.4 Overview of all applicants



All Portal users can see all active SBP certification applicants. All applicants can be viewed by clicking the **All Cert. Applicants** menu.

The public view of all applicants includes limited details for each applicant and does not include personal data.

It is possible to sort and filter applicants by application date, applicant name, type and country.

5 Managing SBP certificates (CB only)

5.1 Overview of SBP Certificates

Certification Bodies can get an overview of all their SBP certificates by clicking on the 'All Certificates' button on the left side menu.

This opens a list view of all SBP Certificate Holders, where it is possible to search, filter and access detailed information about each certificate.

SBP (Sustainable Biomass Program). Company unit selection

Certificate Data overview.

+ Add Export to Excel

Certificate holder	Certificate Code	Status	Date...	Certification BODY	Date of issue	Expiry date	SBP Products
NEW FEB 23	SBP-00-00	Active		NEPCon OÜ	15-02-2023	14-02-2028	Pellets
PEER's REVIEW	SBP-09-21	Active		NEPCon OÜ	18-05-2022	17-05-2027	Chips
Archer Forest Products LLC	SBP-04-39	Active		ChainPoint	16-05-2026	15-05-2031	Chips
Show Resources Belledune	SBP-03-02	Active		DNV GL Business Assuran...	11-05-2022	10-05-2027	Chips

Click on the row to open the details of the certificate.

SBP (Sustainable Biomass Program). Company unit selection

Certificate Data details.

Edit Review

Certificate Data

Certificate Details

Certificate code	SBP-00-99
Certificate Holder	Larry Pellets Inc
Certification Body	SCS Global Services
Certificate issued	28-08-2021
Certificate expiry ⓘ	27-08-2026
Certificate version	01
Former SBP certificate code	

Certificate Holder details

Primary contact person	Lauri Karmas
Primary contact role	
Primary contact email	dts@sbp-cert.org
Primary contact phone	56456435
Office address	United Kingdom
Production address	Käbi 4, Elva, 43532323, United Kingdom
Country	United Kingdom
Production site coordinates	Latitude: 45.23423400 Longitude: 45.34053500
Office site coordinates	Latitude: Longitude:

5.2 Issuance of new certificates

Certification Bodies are responsible for issuing new certificates after the certification audit has been completed. The system automatically creates a new pending certificate for all new certification applicants. All required field shall be filled in under the certificate record before the certificate can be made active. To access the certificate, navigate to the **Certificate Data** section, open the certificate detail view and click **Edit**.

BioProducer 123 AS. Company unit selection ▾

Edit certificate.

X Cancel Save

Certificate Data

Certificate Details

Certificate code

Certificate Holder BioProducer 123 AS

Certification Body SCS Global Services

Certificate issued X 🗄

Certificate expiry [ⓘ] 🗄

Certificate version

Former SBP certificate code

Certificate Holder details

Production site coordinates

Office site coordinates

Certificate Scope

Primary activity ⌵

SBP products Chips Pellets

Certificate scope X 🗄

SBP Standards SBP Standard 1: Feedstock Compliance v2.0 SBP Standard 2: Feedstock Verification v2.0 SBP Standard 4: Chain of Custody v2.0 SBP Standard 5: Collection and Communication of Data v2.0

DBS approved

Includes Group Scheme

BP Includes NL Cat2 RBA

RED II in the scope

Milestones

Date suspended X 🗄

Suspension reason ⌵ ⌵

Date terminated X 🗄

Termination reason ⌵ ⌵

Transfer date

TMLA signed

Documents

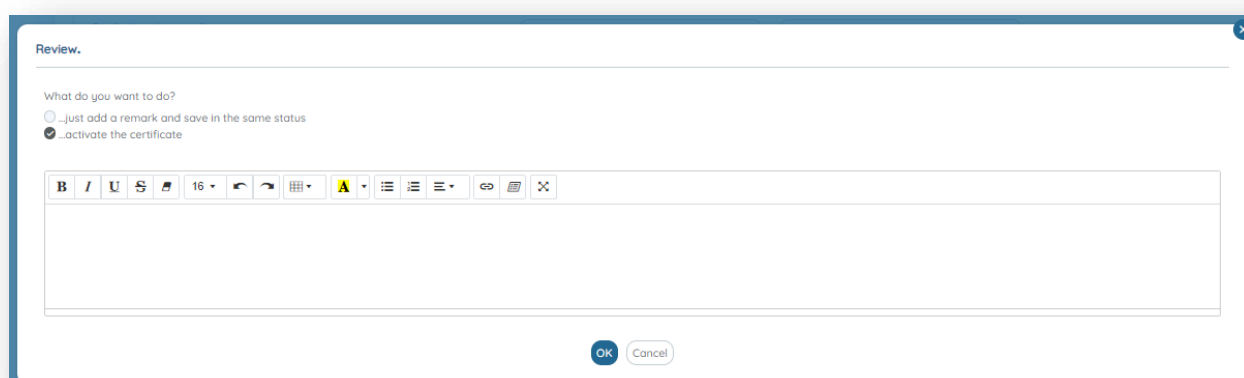
SBP Trade Mark Licence Agreement/TMLA (pdf)

SBP Certificate (pdf)

Note that the certification applicant shall sign the SBP Trade Mark Licence Agreement (link to sign this is sent to the applicant company when the application is registered in the Audit Portal) before the certificate can be activated. Once this is signed, the agreement is uploaded to the **Documents** section by SBP.

In addition, the main assessment reports (PSR and SBR if applicable) shall be completed/closed before the certificate is issued.

When all relevant details are filled and the certificate can be issued, click on the **Save** (in edit mode) or **Review** (in view mode) button to activate the certificate.



This activates the certificate and the Certificate is automatically listed on SBP Certificate Holders section: <https://sbp-cert.org/certifications/certificate-holders/>

5.3 Re-issuance of the certificates

All re-certification audits shall be registered in the Audit Portal at least two weeks prior to the re-assessment audit is taking place. Re-certifications audits can be registered in the **Applicant registration** section (see section 6.4 below). After the re-assessment is registered, the system will automatically generate a new pending certificate for the existing Certificate Holders. This means that there will be separate certificate records for each certification cycle.

The certificate record for the new certification cycle shall be completed before the certificate can be re-issued. The certificate's validity period shall not overlap with the previous certificate.

It is permitted to fill in all details, including re-issue date for the pending certificate and leave it in the 'pending' status – once the (re)issue date is reached, the system will automatically activate the certificate.

SBP Trade Mark Licence Agreement would not need to be re-signed for the new certification cycle – already signed agreement will be transferred to the new certificate in these cases.

Similar to the first issuance of the certificate, the re-assessment PSR and SBR (if applicable) shall be completed before the re-issuance of the certificate.

5.5 Termination of the certificate

The Certification Body is responsible for terminating the certificate when required. The certificate status can be changed by the Certification Body user. To terminate the certificate, open the certificate in edit mode, enter the date and reason of the termination and click save (in edit mode) or review (in view mode) and choose the new certificate status from the picklist:

Milestones

Date suspended	<input type="text"/>
Suspension reason	Select a value
Date terminated	01-09-2023
Termination reason	Lack of SBP feedstock
Transfer date	<input type="text"/>
TMLA signed	01-12-2021

Review.

What do you want to do?

_just add a remark and save in the same state
 _suspend the certificate
 _terminate the certificate

After this, the certificate is terminated and the certificate is moved to the terminated certificate holders section in SBP website.

6 SBP certification audits

The SBP Audit Portal includes records for each audit taking place. Audits are managed by SBP Certification Bodies (CB), but SBP Certificate Holders (CH) have read-only access to their audit data to keep track of the audit's progress.

The SBP certificate is issued for five (5) years, the certification cycle consists of five standard SBP audits.

Before the certificate expiry date is reached, a re-assessment shall be conducted to extend the validity of the certificate for another five (5) years.

In addition, CBs may need to carry out additional audits for scope change or to close open non-conformities.

During each audit the CB generates a Public Summary Report (PSR) and in cases where the Certificate Holder is a Biomass Producer, the Biomass Producer generates a Supply Base Report (SBR).

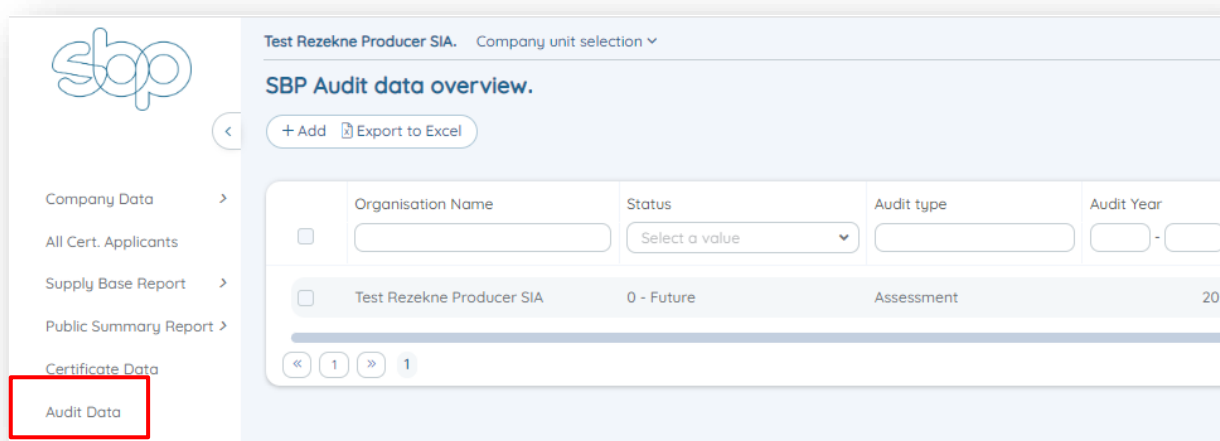
6.1 Standard certification cycle audits

The SBP certificate is issued for five (5) years, the certification cycle consists of five standard SBP audits:

- Main assessment (or re-assessment)
- First surveillance audit
- Second surveillance audit
- Third surveillance audit
- Fourth surveillance audit

Upon registration of the applicant in the Audit Portal, the main assessment record is automatically created for the company.

To view the assessment record, click on “Audit data” on the left side menu.



Click on the Assessment row to view more details about the specific assessment. The level of detail of the audit fields is different for the CBs and the CHs. Certificate Holders have read-only permissions, whilst the CBs can edit the details and have additional buttons available, for example, an option to create a Public Summary Report for that audit.

SBP Audit data details.

[Edit](#)
[Delete](#)
[Review](#)
[Print](#)
[Copy](#)

SBP Audit data

Audit details

Organisation name	Test Rezekne Producer SIA
Certification Body	NEPCon OÜ
Description	
Audit year	2023
Audit scope	Includes SBE
Standard audit type	Assessment
PSR Status	
SBR Status	

Milestones

Planned audit date	01-08-2023
Audit closing meeting	
SBP audit report submitted to SBP ⓘ	
Audit waive date	
Field work target date	

COVID-19 procedure

COVID-19 remote audit date	
COVID-19 part II onsite audit date	
COVID-19 audit notes ⓘ	

Documents

Final public PSR (pdf)	
PSR Upload date	
Final public SBR (pdf)	
SBR Upload date	

Peer review

Peer review?	Yes
--------------	-----

After the assessment is completed and the certificate has been issued, the system will generate all the standard audits in the certification cycle and calculate the audit field work target dates for each audit.

Test Rezekne Producer SIA. Company unit selection ▾

SBP Audit data overview.

+ Add Export to Excel

	Organisation Name	Status	Audit type	Audit Year	Closing meeting	Field Work Targ..
<input type="checkbox"/>	Test Rezekne Producer SIA	3 - Closed/ audit completed	Assessment	2023	31-08-2023	
<input type="checkbox"/>	Test Rezekne Producer SIA	0 - Future	First surveillance audit	2024		31-08-2024
<input type="checkbox"/>	Test Rezekne Producer SIA	0 - Future	Second surveillance audit	2025		31-08-2025
<input type="checkbox"/>	Test Rezekne Producer SIA	0 - Future	Third surveillance audit	2026		31-08-2026
<input type="checkbox"/>	Test Rezekne Producer SIA	0 - Future	Fourth surveillance audit	2027		31-08-2027

6.2 Other audit types

In some cases, the Certification Body may need to conduct additional audits, that are not included in the standard certification cycle. These audits can be:

- **Scope Change Audit** – in cases where the Certificate Holder needs to change the scope of its certificate during standard surveillance audits. For example – inclusion of a Supply Base Evaluation or expanding the Supply Base.
- **Transfer Audit** – in cases where the Certificate Holder decides to change the Certification Body between standard surveillance audits.
- **Reinstatement Audit** – in cases where the certificate of the company has been suspended, the Certification Body may need to conduct an additional audit to reinstate the certificate.
- **NCR-verification audit** – an additional audit to close non-conformities before the non-conformity due date is reached.

Any non-standard audits would need to be created manually by the auditor by first switching to the company profile, navigating to the Audit data menu and the clicking on the **'+Add'** button. All additional audits will appear on the list of audits, including audits for the next certification cycle after re-assessment.

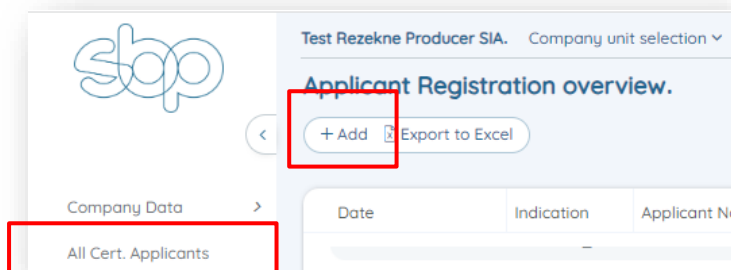
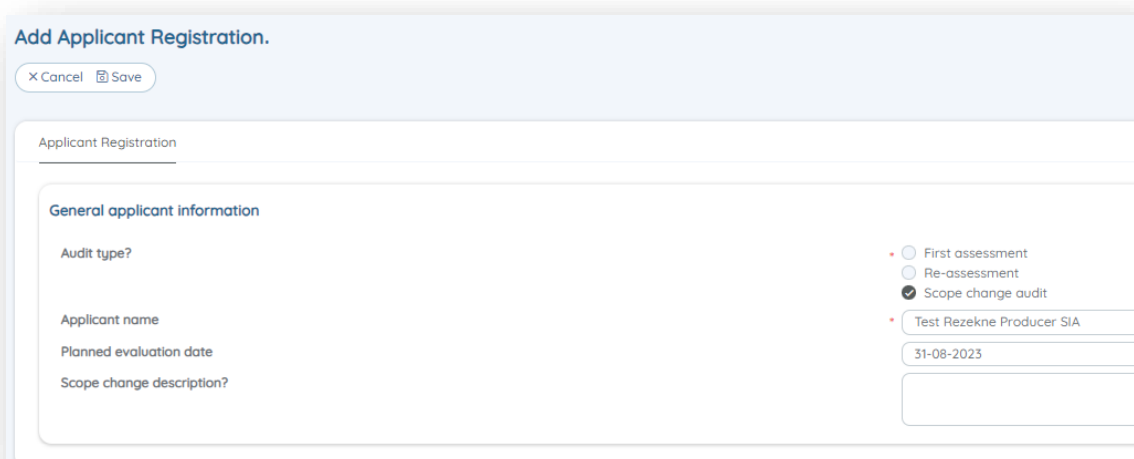
Test Rezekne Producer SIA. Company unit selection ▾

SBP Audit data overview.

+ Add Export to Excel

	Organisation Name	Status	Audit type	Audit Year	Closing meeting	Field Work Targ..
<input type="checkbox"/>	Test Rezekne Producer SIA	3 - Closed/ audit completed	Assessment	2023	31-08-2023	
<input type="checkbox"/>	Test Rezekne Producer SIA	0 - Future	First surveillance audit	2024		31-08-2024
<input type="checkbox"/>	Test Rezekne Producer SIA	0 - Future	Second surveillance audit	2025		31-08-2025
<input type="checkbox"/>	Test Rezekne Producer SIA	0 - Future	Third surveillance audit	2026		31-08-2026
<input type="checkbox"/>	Test Rezekne Producer SIA	0 - Future	Fourth surveillance audit	2027		31-08-2027

CBs shall register scope change audits that also require stakeholder consultation, through entering a form in the applicant registration page. Example:

6.3 Field work target dates

Certification Bodies are required to conduct surveillance audits according to a specific timeframe that is set by the close of the main assessment audit. This requirement does not apply to main assessments and re-assessments or scope change audits. The due dates to conduct the audit (complete the on-site/remote audit) are called 'Field Work Target Dates (FWTD)'

FWTDs are calculated by the following formula:

- 'First Surveillance Audit' FWTD = Main Assessment audit closing meeting date + 12 months;
- 'Second Surveillance Audit', FWTD = Main Assessment audit closing meeting date + 24 months;
- 'Third Surveillance Audit', FWTD = Main Assessment audit closing meeting date + 36 months; and
- 'Fourth Surveillance Audit', FWTD = Main Assessment audit closing meeting date + 48 months.

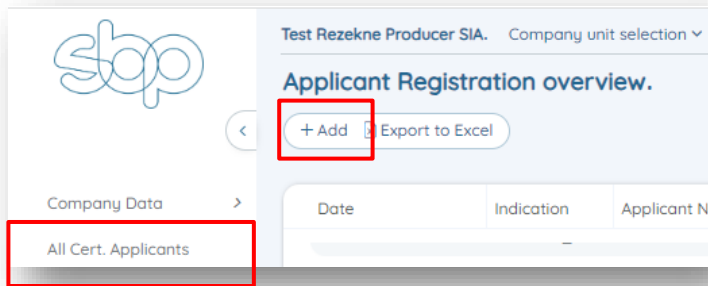
FWTDs are calculated automatically in the SBP Audit Portal after the main assessment or re-assessment is completed by the Certification Body and the certificate is activated.

In exceptional cases, Certification Bodies may ask for a change to the audit schedule or to a specific audit, in which case they should contact SBP for approval after which (if granted) the dates are changed in the Portal.

FWTD is not applicable for scope change, transfer, NCR-verification or additional audits.

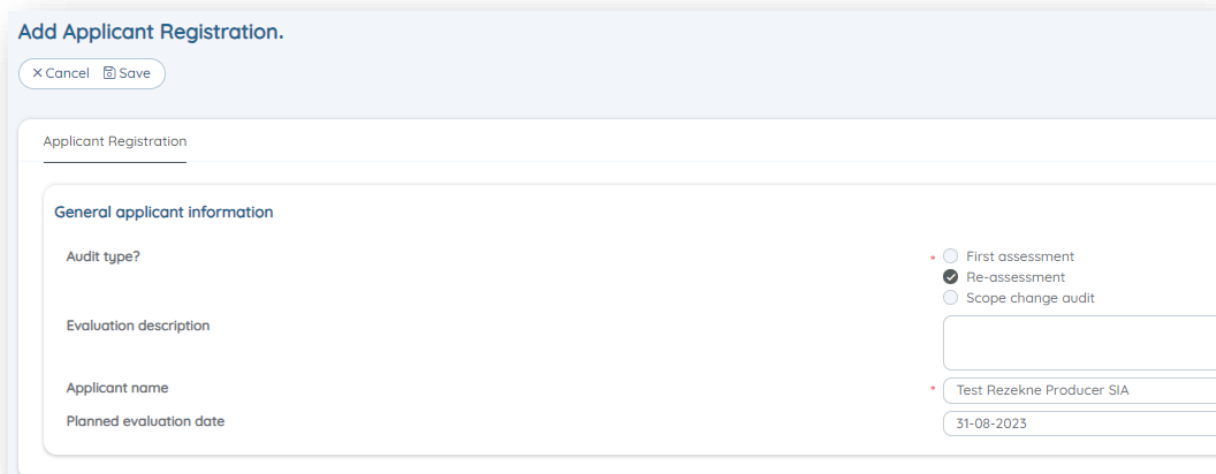
6.4 Re-assessments

Re-assessments shall be registered in the Portal in a similar way to registering main assessments or scope change audits, that is, through the applicant registration form. This also triggers the SBP stakeholder consultation on the new applicant.



The application form is different for first assessments, re-assessments and scope change audits.

For re-assessments, the CB needs to choose the existing Certificate Holder by typing the name of the company in the 'applicant' field. This prefills the fields with the existing data from the system.



On saving the applicant registration form it is submitted to SBP for review. After approval of the applicant, a re-assessment record will be added to the Audit data list for the Certificate Holder and a new pending certificate will also be created for this company.

Review.

What do you want to do?

- ...save the form and submit it later.
- ...submit the application for review by SBP.



A rich text editor toolbar with the following icons from left to right: Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Bulleted List, Numbered List, Indent Left, Indent Right, Undo, Redo, Table, Text Color (A), Background Color, Bulleted List, Numbered List, Indent Left, Indent Right, Link, Unlink, and Close (X).

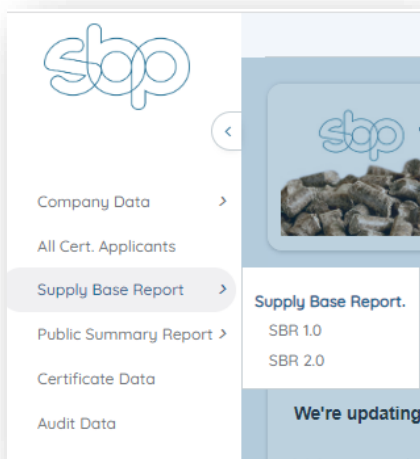
OK Cancel

7 Supply Base Report (SBR) template

Certification applicant companies and SBP Certificate Holders of type “Biomass Producer” are required to fill in a Supply Base Report form before the main assessment and annually before the surveillance audit takes place. The SBR template in the SBP Audit Portal will always be the latest available version. If a new version of the template is released, the form is automatically updated and made available for use.

All Biomass Producers are required to fill in a new full SBR each year, there isn't a separate section for annual updates only. To make this process more efficient, copying a previous SBR is an option when only certain fields are to be updated.

7.1 Creating a new SBR

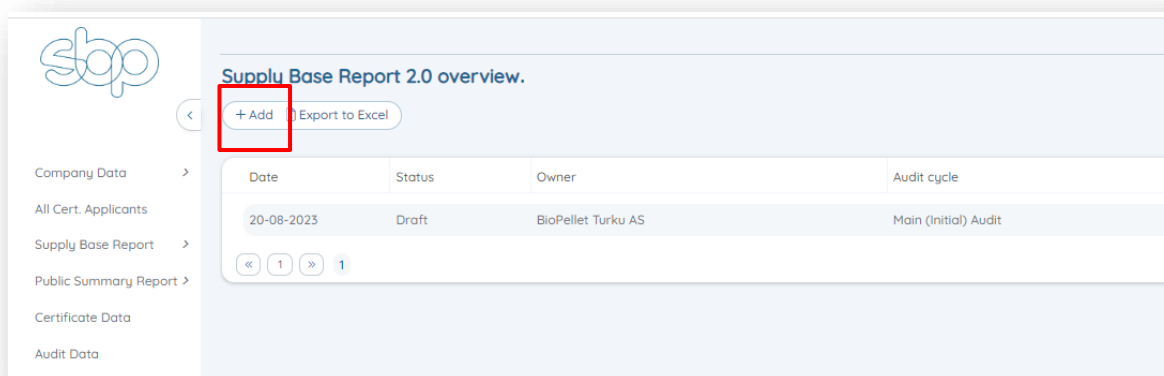


SBP certification applicants of type ‘Biomass Producer’ will have a draft SBR available at the time their account is activated. This allows the company to start filling in the required template relatively early in the certification process. All such applicants and existing SBP Certificate Holders of type ‘Biomass Producer’ can access Supply Base Reports by clicking on the “**Supply Base Report**” menu on the left sidebar. This section has two sub-sections – SBR 1.0 and SBR 2.0. SBR 1.0 shows all SBRs that are created for SBP Standards v1.0 and SBR 2.0 section shows all SBRs created in accordance with SBP Standards v2.0.

Certificate Holders who have previously completed SBR templates can see existing records of the SBRs with status “Approved”.

To view details of a specific SBR, click on the row. This opens the form giving all the details and history.

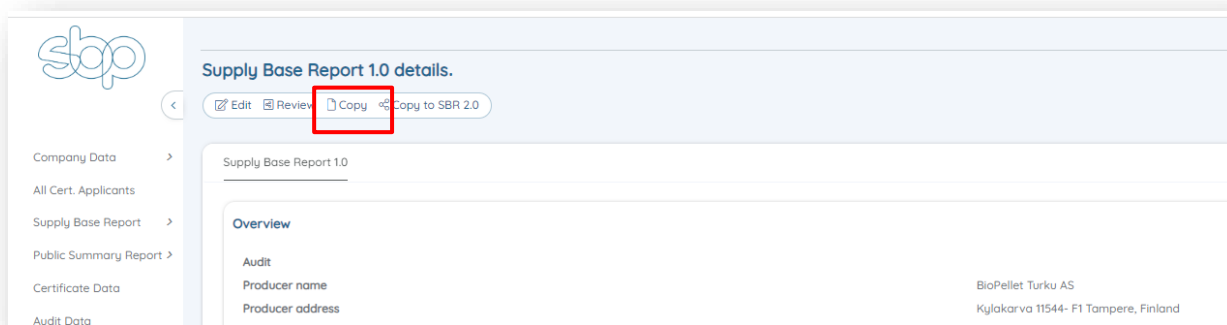
In case you want to start filling in the SBR template from scratch, click on the “+ Add” button.



7.2 Copy SBR from last year

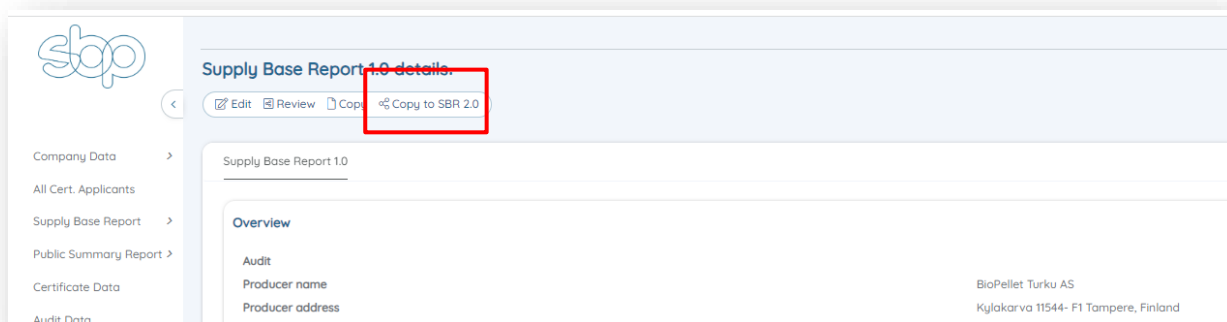
It is possible to re-use the SBR form that has been previously filled in by copying it and updating only those fields that have changed during the year.

To copy an existing SBR template, open the SBR from the list and click **Create copy** button. This will copy the full SBR with the findings and allow the user to update only specific fields, so avoiding spending time on re-writing findings from last year. To avoid unintentional mistakes by using this method to produce the SBR, some findings are not copied and will always require manual updates.



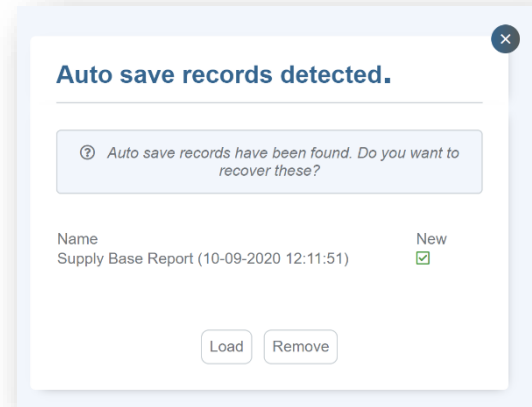
7.3 Copy SBR v1.0 to v2.0 template

It is also possible to copy the SBR v1.0 to SBR v2.0 template. To do so, open the previously approved SBR v1.0 and click "Copy to SBR 2.0" button. Since the content of SBR 2.0 is significantly different to SBR v1.0, only matching sections in both templates are copied to the newest template.



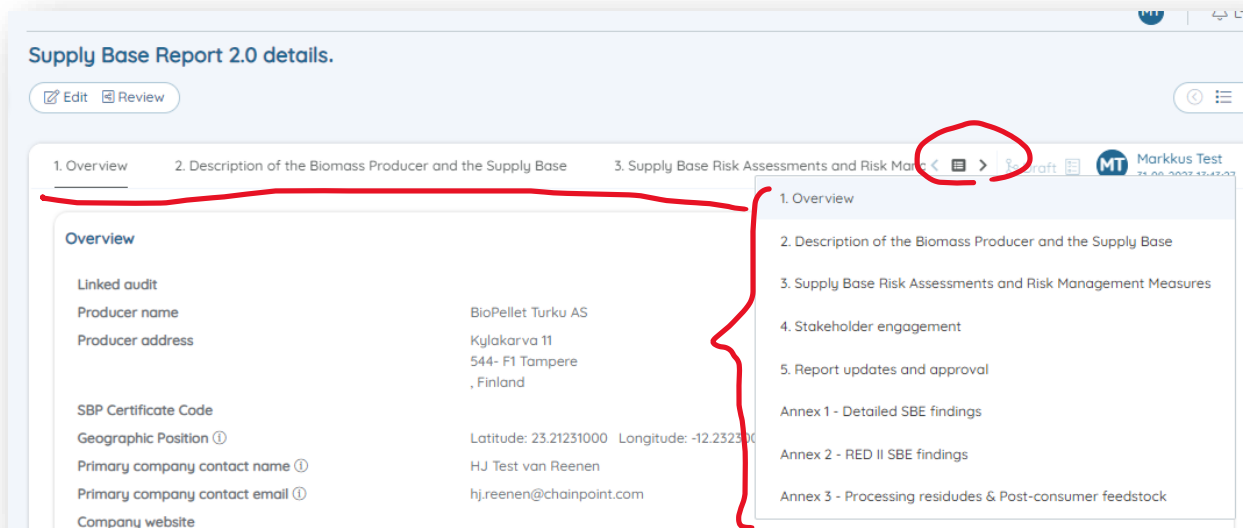
7.4 SBR template autosave

The system will automatically save the SBR form every five minutes to prevent any data loss due to accidental closing of the browser, possible network disruption etc. If you return to the Portal and want to continue working on the SBR, but there are some unsaved changes on the form that were auto-saved last time the system will notify you and offer to recover those changes.



7.5 SBR v2.0 structure and navigation

SBR 2.0 template has a new structure and method to navigate between sections. To navigate between sections, click on the section name on the navigation bar. You can scroll through all sections using the small arrows or click on the bookmarks button highlighted below to jump to a specific section.



7.6 SBR v2.0 workflows

SBR 2.0 has built-in dependencies and workflow, where answers to one field determine the content for the following sections.

7.6.1 SBR v2.0 - feedstock origin and supply base details

In the SBR v2.0 'Overview' section the user has to enter all countries, where the feedstock is sourced. New countries can be added by using the '+' button.

For each country selected in the section 1 – Overview, the system automatically creates detail tables to section 2 – Description of the Biomass Producer and the Supply Base.

In this detail page, the user selection for each country defines which details are to be entered in the following sections in the SBR. For example, Annex 1 – Detailed SBE findings is created separately for a country, if Biomass Producer’s own risk assessment is used in the sourcing country. In case RRA is used or only processing residues with SBP recognised claim or post-consumer material is used, Annex 1 is not created.

Risk assessment(s)

- N/A - Only processing residues with SBP recognised claim
- N/A - Post-consumer feedstock
- Yes - Biomass Producer's own risk assessment used (SBE)
- Yes - Regional Risk Assessment (RRA) used

Similar logic is used in the 'Includes RED II SBE' field – if 'yes' is chosen, Annex 2 – RED II SBE findings is created for this country.

Includes RED II SBE * No Yes

7.7 SBR Annex 1 - Detailed Findings for Supply Base Evaluation Indicators

SBR Annex 1 – Detailed Findings for Supply Base Evaluation Indicators has been incorporated into the SBR template and relevant additional fields will be visible based on the user selection, if Supply Base Evaluation is used and if Regional Risk Assessment (RRA) has been used or not.

In the SBR v2.0, Annex 1 is created for each country/region separately.

The screenshot shows the 'Annex 1 - Detailed SBE findings' form in the SBR. The form is divided into several sections:

- Country:** Latvia
- Area:** (Empty)
- Indicator:** 111 Operations related to feedstock sourcing and biomass production shall comply with all existing applicable laws and regulations.
- Supply Base Verifiers:** (Empty)
- Finding:** (Empty)
- Risk rating:** Low Risk (Selected)

The form also includes a rich text editor for the finding and a risk rating dropdown menu.

7.8 Sending SBR to CB review

The SBR is visible only to the company until this is submitted to the CB for review. To submit the SBR to a CB for a review, open the SBR and click on the **Review** button. In case not all required fields are filled in, the system will prompt you with a warning and highlights sections where deficiencies are detected:

In case all required sections and fields are completed, an optional message can be added before the report is sent to the Certification Body.

7.9 Approval of the SBR

The SBR needs to be approved by the report author and senior management of the company. In addition, the CB shall review and approve the report.

The report author and senior management can sign off the SBR by adding their name, title and date of signature to sections 5.1 in the SBR v2.0.

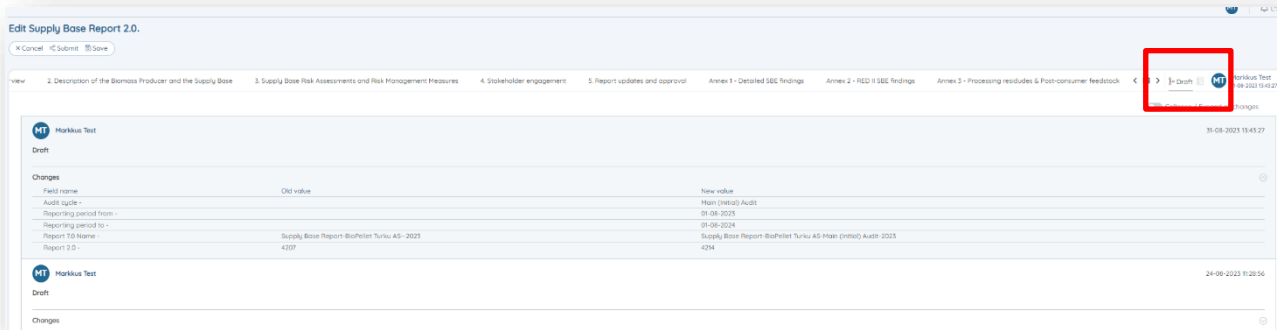
It is possible to add multiple signatures by clicking the **Add row** button.

When the company sends the SBR to the CB for review, the CB can access the SBR from multiple locations:

- Homepage Tasks Dashboard
- Clicking on the All SBRs menu and filtering SBRs with status “CB Review”
- Switching to the company profile through company selector and navigating to the Supply Base Report menu

The CB can review the SBR by clicking the **Edit** button, and add comments or make changes directly in the report, then saving the SBR and choosing the status and adding any remarks:

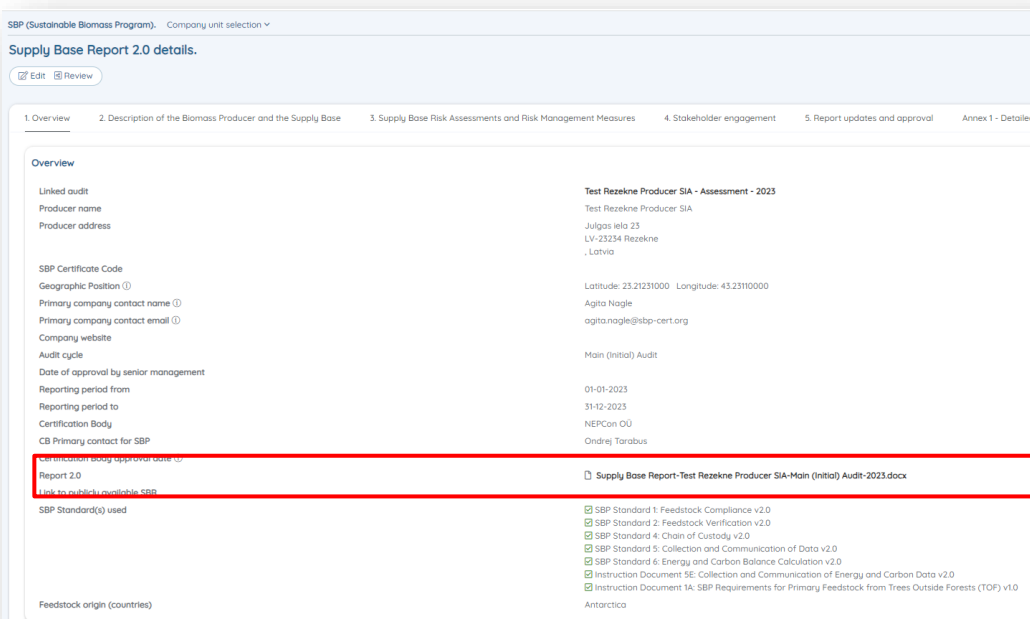
All changes that each user makes in the SBR form will be visible under the **Status History** page. Clicking the **Changes** button expands all the changes at the field level that the user has made. This enables tracking of the changes made by different users and the CB.



7.10 Generating the final SBR PDF document

Once the SBR has been completed by the company, signed off and approved by the CB, the system will generate the final PDF version of the SBR automatically. The final pdf report will be attached to the SBR form and will be also available under the related audit 'Documents' section.

To access the final SBR pdf document from the SBR, open the relevant SBR from the list and then open the link 'Report 2.0' under the 'Overview' section. Word version of the SBR is available until the SBR has been approved.



To access the final SBR pdf document from the audit record, navigate to the relevant audit record and scroll to the 'Documents' section:

SBP Audit data overview.

+ Add Export to Excel

Indication	Organisation Name	Peer...	Audit type	Final public PSR (pdf)	Final public SBR (pdf)	PSR up...
20210412_10...	TEST COMPANY APR21		Assessment	Public Summary Report-Pellets Power 2-Re-a...	Supply Base Report-Hazlehurst Wood Pellets, LLC-Fourth S...	

Documents

Final public PSR (pdf)	PSR v.2.0_2023_Test Producer.pdf	31-08-2023 14:19:22
PSR Upload date		
Final public SBR (pdf)	SBR v.2.0_2023_Test Producer.pdf	31-08-2023 14:19:27
SBR Upload date		

8 Generating Public Summary Report (PSR) – CB only

Only Certification Body users can create PSRs.

Creation, review and submission of the PSR follows a specific path in the Audit Portal, as follows:

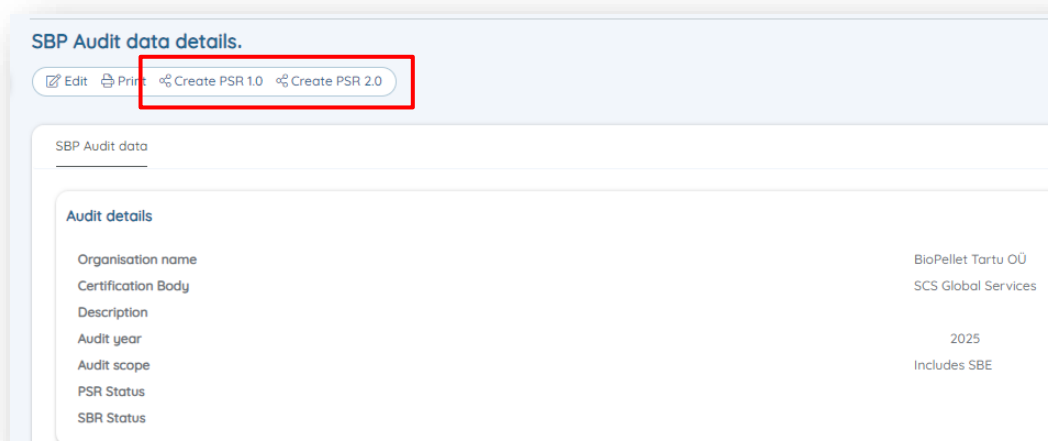
- The first step is always the creation of the PSR from the relevant audit record;
- After the PSR is completed by the auditor, the PSR shall go under internal CB quality review;
- PSR quality review – when the PSR is approved, the auditor can send the PSR for Certificate Holder review;
- PSR quality review – when the PSR is not approved, the auditor needs to make relevant changes and resubmit this to the quality reviewer;
- Client review – the CH can submit comments on the PSR until the auditor finalises the PSR (optional);
- When the CH does not provide any comments or the comments have been received, the auditor needs to finalise the PSR – this generates the final pdf version of the PSR and saves the file under the PSR and audit records.

Each step is described in more detail in the following paragraphs.

8.1 Creating a new PSR/selecting PSR version

To create a new Public Summary Report (PSR) form for the company, the CB shall first switch to the CH's profile by using the company selector.

When you have switched to the CH's profile, navigate to the **Audit data** on the left side menu. Then, open the relevant audit, where the PSR needs to be created.



On the audit detail view, make sure that the required details are filled in on the audit record. Click **Edit** to make any changes to the audit record. Then choose either to create PSR for SBP Standards v1.0 or SBP Standards v2.0.

It is not possible to create multiple PSRs for an audit. Each individual PSR shall be linked with a unique audit record.

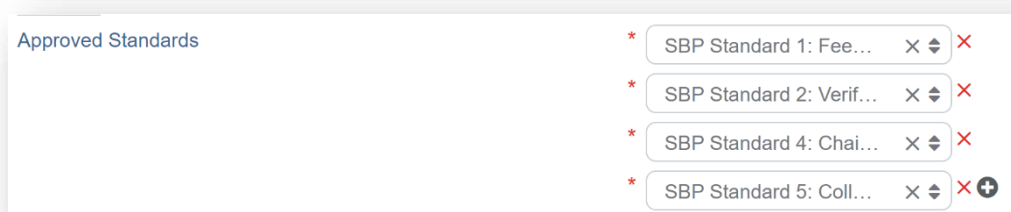
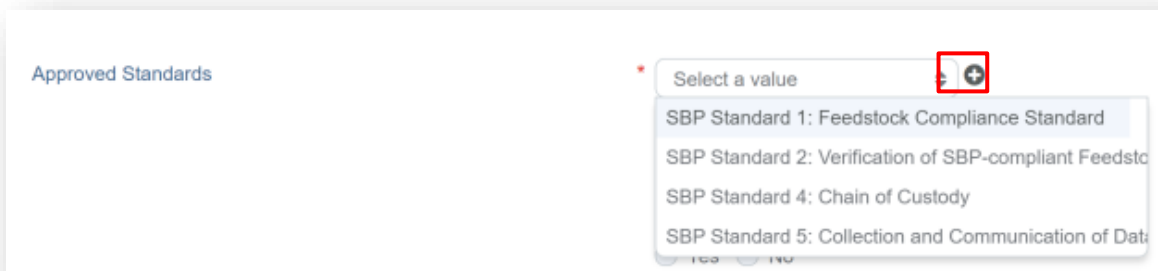
If all the validations are met and the system generates the PSR for an audit, a notification will be displayed, where you can click to start filling in the PSR form immediately.

A PSR was created based on last year's PSR. Click [here](#) to go to the PSR.

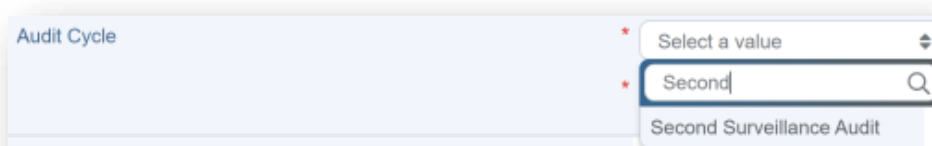
The PSR form includes a variety of different fields, field sets, sub-forms and validations. Required fields are marked with a red asterisk. Wherever possible, the system will generate the field values automatically. This includes PSR fields such as: Certification Body, Primary CB contact for SBP, Primary CB contact mail, Company contact for SBP, Audit cycle. The field values for these fields are automatically generated from related records – primary contact person for a CB, primary contact for the company, etc. To update the values, the changes need to be made to the related records directly.

The most common field types used in the PSR form are the following:

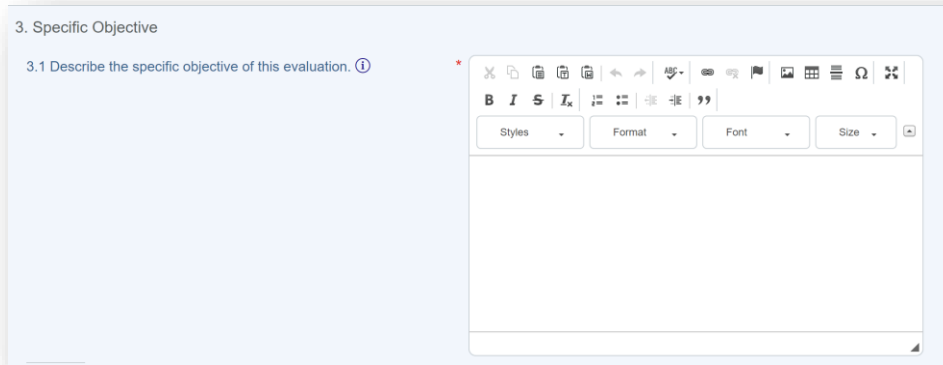
- o **Multi-select picklist** – you can add more values by clicking on the black '+' icon next to the dropdown menu.



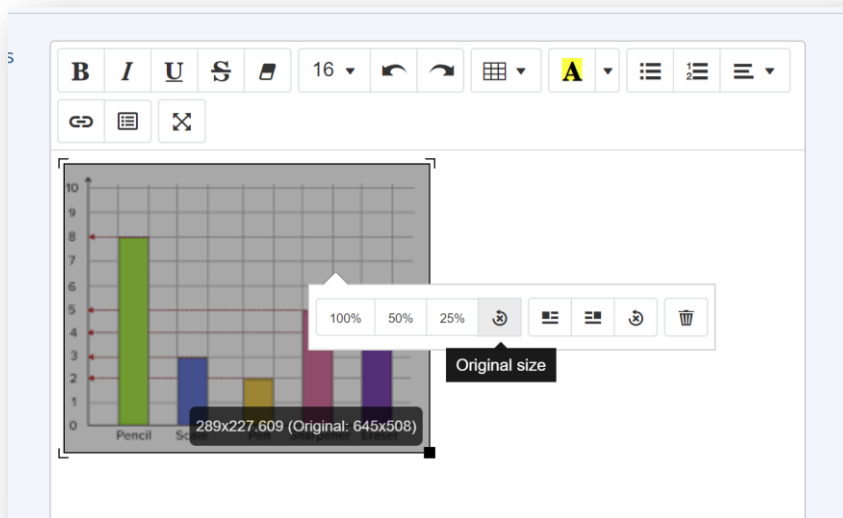
- o **Multi-select picklist with the search box.**



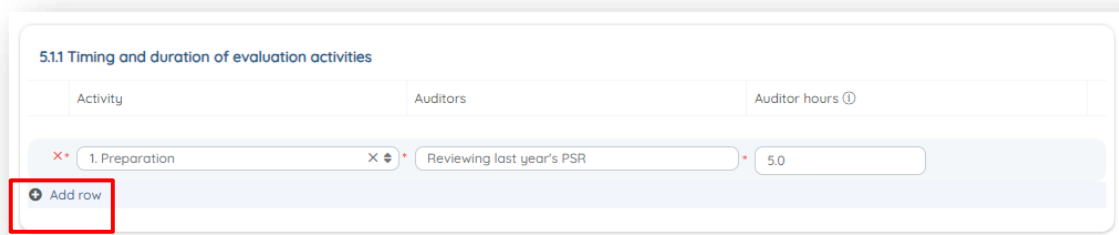
- o **Text area** – a free text area, where you can paste text, images, add tables, etc. You can resize the text area by dragging the box from the bottom right corner.



When pasting an image, click on the image to change its size – you can quickly choose between a 100%, 50% or 25% picture size:



- o **Set of fields in a sub-form** – clicking **Add row** below the fields will add a new set of fields.

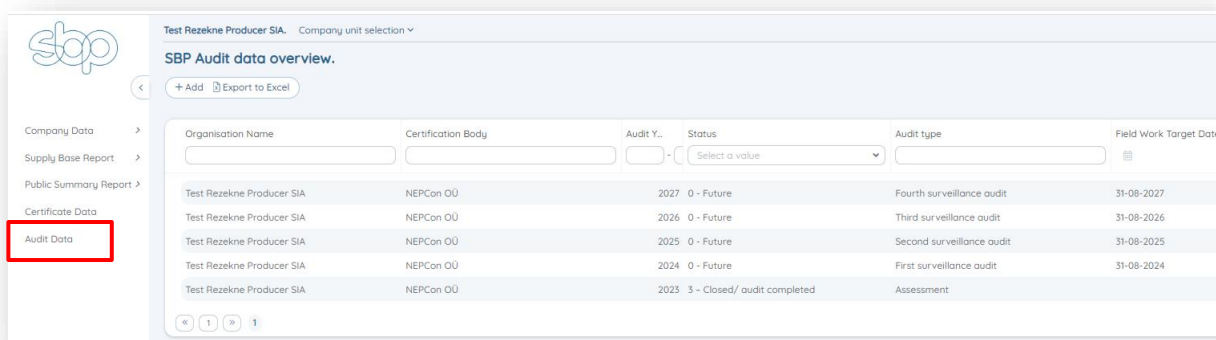


- o **Sub-forms** – clicking the **Add** button adds a whole new section. You can add multiple sections.

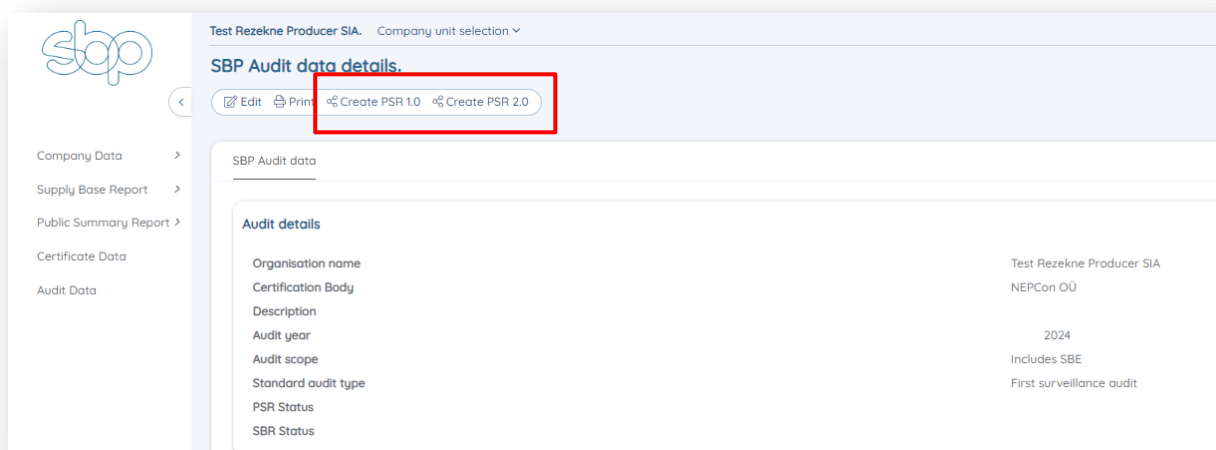
8.2 Copy PSR from last year

It is possible to re-use a PSR form that has been previously filled in by copying it and updating only those fields that have changed during the year.

To generate a new draft PSR for an audit by copying the last year's PSR, switch first to the relevant company using the company selector. Then navigate to **Audit data** and open the audit record to which you want to create the new PSR.



In the audit detail view, click on the **Create PSR** button. If you are creating the PSR v2.0 for the first time, it will only copy the open NCR-s, if any, from the PSR v1.0.



This operation always checks the latest available finalised PSR and generates a copy of it. The copied PSR is then linked with the audit record it was generated from.

Note that whilst the copy function generates the PSR with most of the findings from last year, it does not copy all sections and the user will always need to update specific sections of the PSR. In addition, only non-conformances with 'open' status are copied.

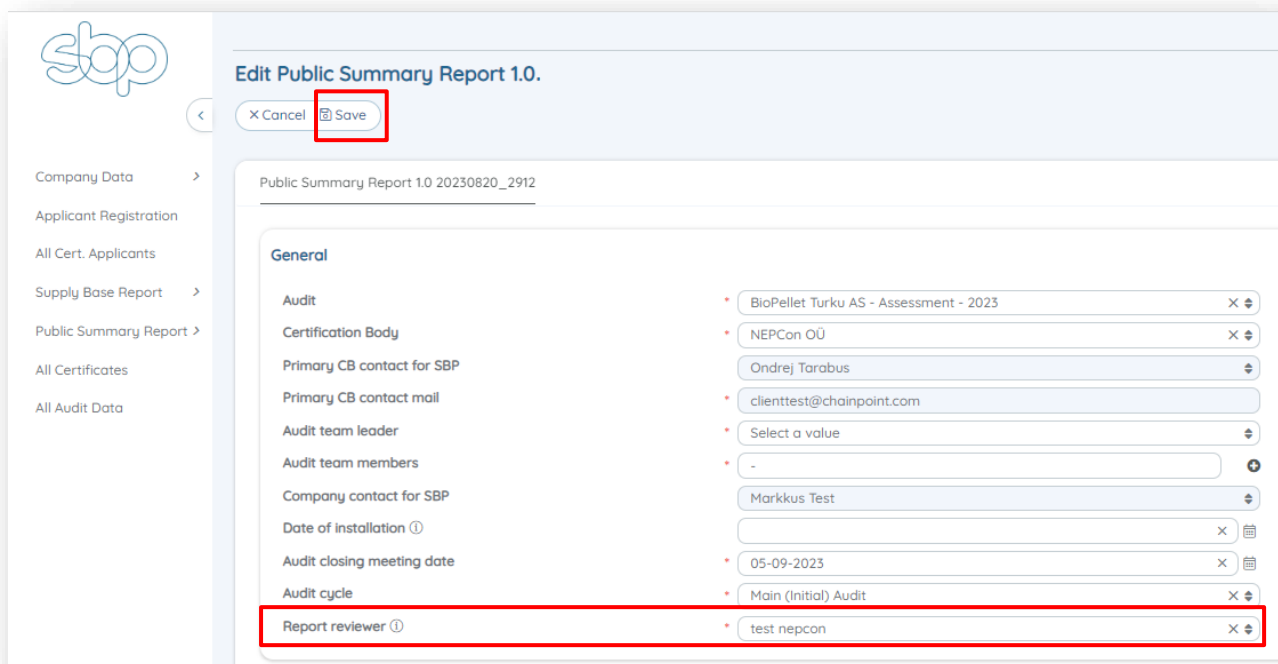
8.3 PSR Internal quality review

The PSR shall be reviewed internally by the CB quality reviewer before the PSR is sent for the Certificate Holder review and/or finalised. The user filling in the PSR shall select the person reviewing the PSR in the “Report reviewer” field under the General section of the PSR. The PSR form includes validation rules that prevent sending the PSR for review before all required fields are filled in. When all the required fields are completed and the report reviewer field is filled, the PSR form can be submitted for the internal quality review.

The internal quality review can only be done by CB users with the role “CB-Reviewer”. The person conducting the review shall be made a user of the Portal before the PSR can be submitted for review.

8.3.1 Submitting PSR for internal quality review

To send the PSR for review, make sure that the “Report reviewer” field is filled in with the internal quality reviewer name and then click on the “Save” (in edit mode) or “Review” (in view mode) button on the detailed view of the PSR.



The screenshot shows the 'Edit Public Summary Report 1.0' interface. On the left is a navigation menu with items like 'Company Data', 'Applicant Registration', and 'Public Summary Report'. The main area is titled 'Public Summary Report 1.0 20230820_2912' and contains a 'General' section with various fields. The 'Save' button at the top is highlighted with a red box. The 'Report reviewer' field at the bottom is also highlighted with a red box and contains the text 'test nepcon'.

Field	Value
Audit	BioPellet Turku AS - Assessment - 2023
Certification Body	NEPCon OÜ
Primary CB contact for SBP	Ondrej Tarabus
Primary CB contact mail	clienttest@chainpoint.com
Audit team leader	Select a value
Audit team members	-
Company contact for SBP	Markkus Test
Date of installation	
Audit closing meeting date	05-09-2023
Audit cycle	Main (Initial) Audit
Report reviewer	test nepcon

Edit Public Summary Report 2.0.

X Cancel **Save**

1 Overview 2 Audit conclusions 3 Scope of the audit and SBP certific < > PSR started ST SCS test 18-09-2023 10:08:19

General

Certification Body * SCS Global Services X

Primary CB contact for SBP Maggie Schwartz

Audit * BioPellet Tartu OÜ - Fourth surveillance audit - 2025 X

Primary CB contact mail * clienttest@chainpoint.com

Audit team leader * SCS test X

Audit team members * - +

Company contact for SBP Test Test X

Audit cycle * Scope Change Audit X

Date of installation ⓘ X

Audit closing meeting date * 04-01-2022 X

Report reviewer ⓘ * SCS test X

Report 2.0 Public Summary Report-BioPellet Tartu OÜ-Scope Change Audit-2025.docx

Add any comments or notes to the reviewer and then submit the PSR for review.

Review.

What do you want to do?

save the form and submit it later.

...submit for review by CB reviewer.

B I U S 16 [undo] [redo] [list] [bullet] [link] [unlink] [table]

Please review this PSR. |

OK Cancel

The PSR is then set to status 'Ready for review' and is locked for editing by the report author.

8.3.2 Conducting CB internal PSR review

The PSR quality review can be conducted only by users with the 'CB-reviewer' role. When the reviewer logs into the Portal and there are some PSRs to review, a task appears on the homepage with the number of PSRs to review. The same 'Tasks' section also includes the link to all SBR's that are waiting for the approval of the CB.

Tasks	
Supply Base Report 1.0	8/10
Public Summary Report 1.0	4/6

Clicking the template name will open the list of reports to be reviewed.

To start the review, open the PSR by clicking on the relevant row. The PSR is open for editing for the PSR reviewer at this point, so the user can make direct changes if required. Each change is logged in the status history and can be viewed later by the auditor or by the company.

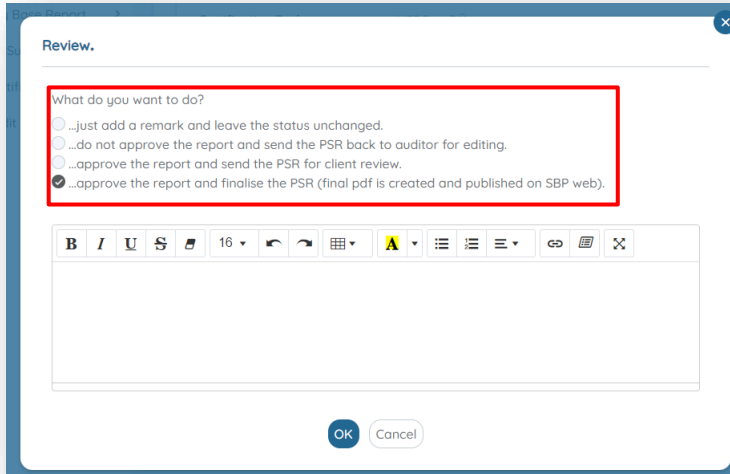
After the review is done, the reviewer needs to fill in the Approval/Certification decision section and choose either to approve or reject the report.

21 Certification decision

Based on the auditor's recommendation and the Certification Body's quality review, the following certification decision is taken:

Certification decision	• <input type="text" value="Certification approved"/> x ↕
Decision made by	• <input type="text" value="Report Reviewer"/>
Other comments	<input style="width: 100%;" type="text"/>
Date of decision	• <input type="text" value="14-09-2023"/> x 📅

Options after save:



8.4 PSR review by the Certificate Holder

The PSR can be sent for the CH review after the internal CB quality review is done and the reviewer has approved the PSR. **The CH cannot see the PSR until it is submitted for their review.**

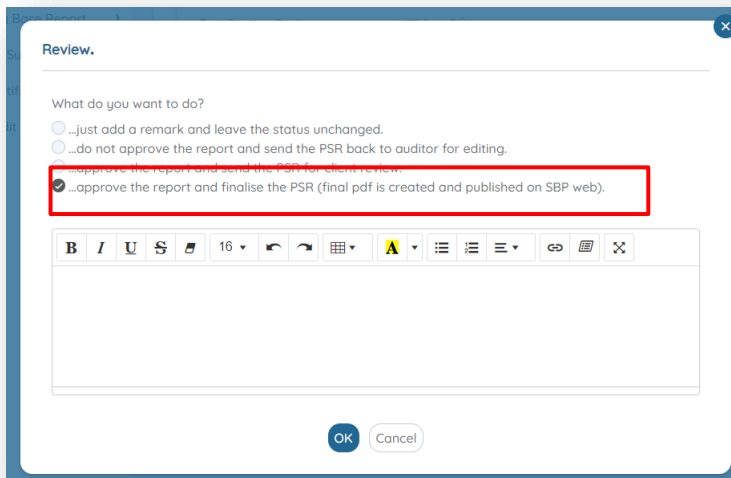
To submit the PSR to the CH review, navigate to the relevant PSR, which should be in the stage **“Approved by Reviewer”**, then click on the **“Review”** button, add a custom message and choose the relevant option to send the PSR for the CH review.

After sending the PSR for the client review, the company will receive an email notification and be asked to log into the Portal to review the report.

The company cannot edit the report directly, but can add any comments to the review section.

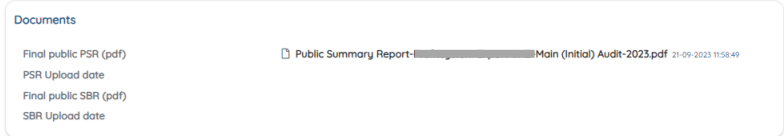
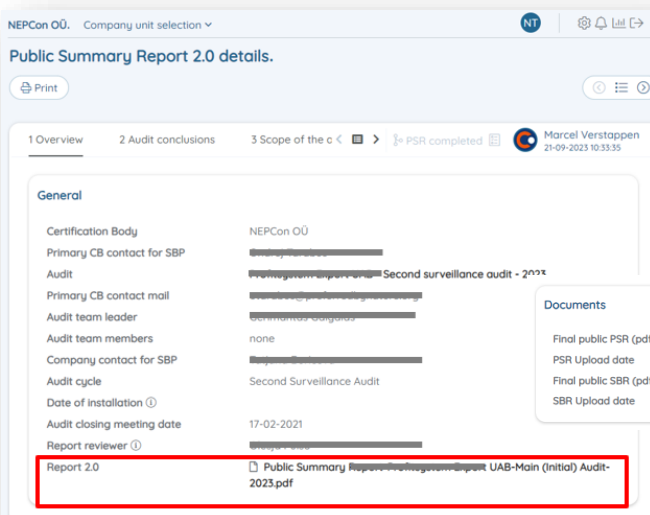
8.5 Generating final PSR (pdf)

The CB shall finalise the PSR by setting the status to ‘Finish PSR’ status. This can be done by the report author/auditor after the CB internal quality review has been completed. In cases where the CH does not respond to the request for review or has already submitted comments, the auditor can finalise the PSR at any point. In cases where the CH has reviewed the PSR, the status of the PSR at that point is “Additional information received”, if there is no feedback, the PSR is still in the “Ready for client review” stage.



To finalise the PSR and generate the final pdf document, click on the **Review** button and choose the option shown on the left side screenshot.

After clicking OK, the system generates a final pdf report from the PSR form and saves it as a final document in two places – under the PSR itself and under the audit record's 'Documents' section.



9 CB Peer Review Process

All CB Peer Reviews shall be registered in the Audit Portal by using the Peer Review checklist under the related Audit record.

All SBP approved Peer Reviewers have access to the Audit Portal and access to relevant SBP reports is granted after the CB assigns the Peer Reviewer a new task to review the audit reports.

9.1 Assigning Peer Reviewer

Prior to making the certification decision, the Certification Body (CB) shall submit the draft certification report to a formal peer review process, for the following audit scopes:

- Main and re-assessment of Biomass Producers (BPs) against Standard 1, that is, BPs with Supply Base Evaluation;
- Extension of scope of the Supply Base Evaluation; and
- First assessment and re-instatement of any suspended SBP BP certificate with Supply Base Evaluation.

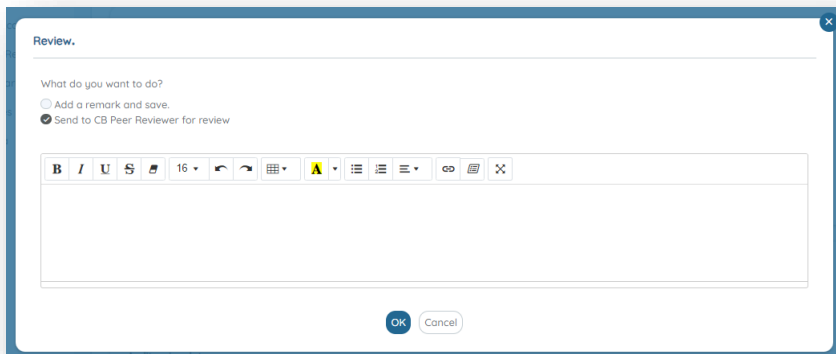
After the reports are ready for the review in the AP, the CB can assign the Peer Reviewer in the AP by navigating to the related 'Audit' record of the company and navigating to the 'Peer review' section:

The screenshot shows a 'Peer review' form with the following elements:

- Peer review?**: Radio buttons for 'No' and 'Yes'.
- Peer reviewer**: A dropdown menu with the text 'Select a value' and a list of names: Erik Lammerts van Bueren, Jeremy Williams, Kathryn Fernholz, Nicolas Blanchette.
- Peer review date**: A text input field.

Note: Peer Reviewer selection is only displayed when the 'Peer review?' field value is 'Yes' AND the PSR for this audit has been filled in.

Once the Peer Reviewer is chosen, please save the audit record and click on the 'Review' button and choose "Send to CB Peer Reviewer for review" option. You may add an optional message for the peer reviewer in the text box.



After this has been done, the system automatically sends an email to the selected Peer Reviewer with a notification, that they have been assigned a new peer review and also a link to the relevant audit record in the Audit Portal.

The Audit status is updated to “CB Peer Review in process”.

Note that the Peer Reviewer user is then also granted permissions to access all audit related documents in the Audit Portal. In case the Peer Reviewer is not assigned as the peer reviewer on the audit, he/she will not have access to the company.

9.2 Peer Review process

After the Certification Body has assigned a new audit for the Peer Reviewer for the review, following email is sent to the Peer reviewer:

Subject: SBP Audit ready for peer review

Email body:

Hello {Peer Reviewer name}

This {Audit year} audit for {Certificate Holder/applicant name} regarding {Audit type} is ready for peer review.

Please follow this {Link} in the email to log into the SBP Audit Portal and complete the peer review.

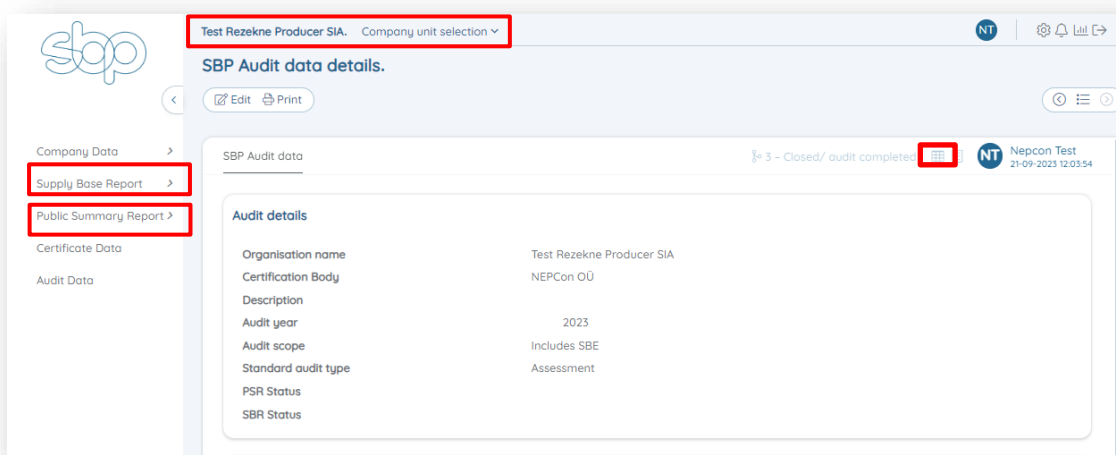
Regards,

{Certification Body Name}

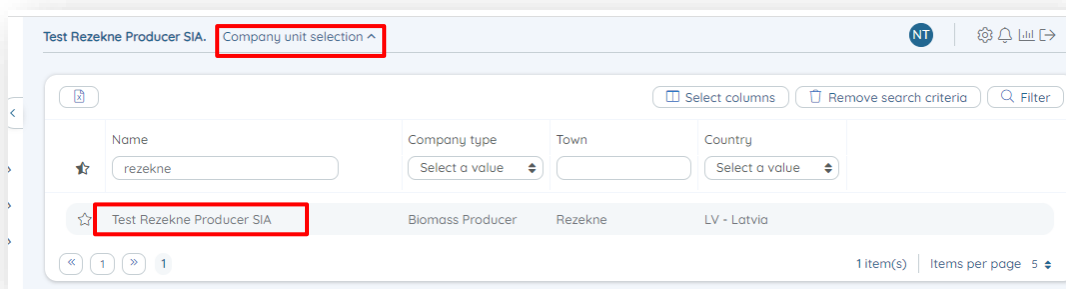
9.2.1 Accessing relevant Audit details and forms

Clicking the link in the email will redirect the Peer Reviewer to the Audit Portal's login page. After login, the user is automatically directed to the relevant Audit record, which shows the main details about the evaluation.

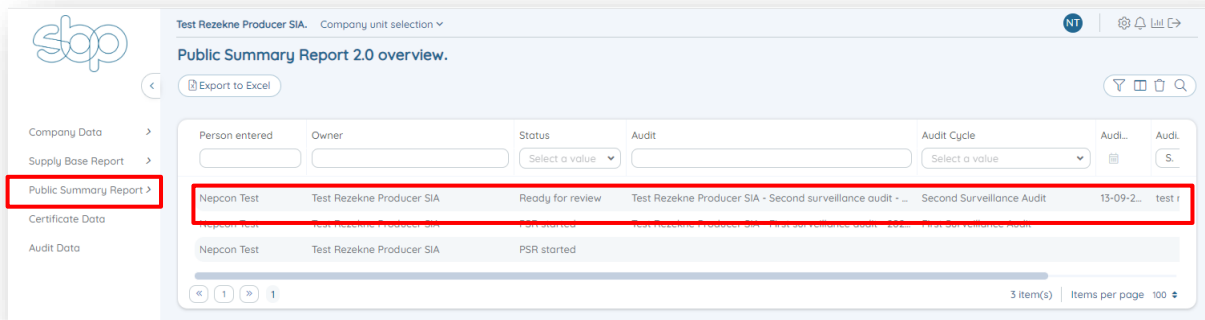
To access related audit reports – Public Summary Report and Supply Base Report, the Peer Reviewer shall either click on the “Related reports” menu on the audit record or navigate to “Supply Base Report” and “Public Summary Report” menu on the left side of the screen.



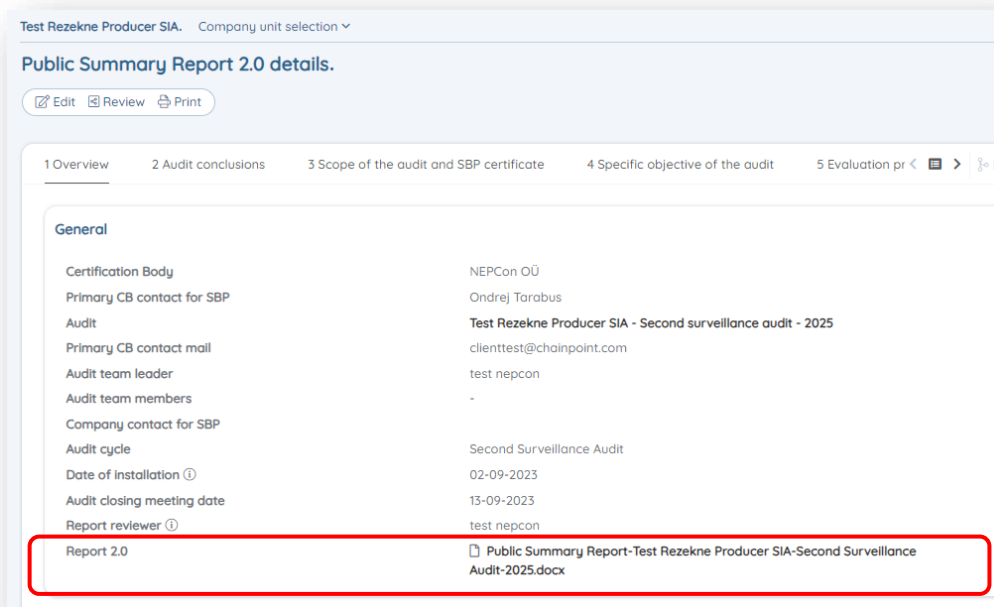
When the Peer Reviewer logs into the Audit Portal without using the link in the email, but just following the URL portal.sbp-cert.org, then it is required to first switch to the correct company by using the company selector on top of the page and searching by the company name. Leaving the name field blank and hitting the enter button will display a list of all companies that the Peer Reviewer has been assigned as a reviewer.



The Public Summary Report (PSR) can be reviewed directly in the Audit Portal as a form as well as downloading a pdf. To access the PSR, navigate to the ‘Public Summary Report’ section and click on the relevant PSR on the list. This will open the PSR form.



To download the PSR as a pdf, open the PSR form and click on the 'Report 2.0(pdf)' link:



The Supply Base Report (SBR) can also be reviewed directly in the Audit Portal as a form as well as downloading a pdf. To access the SBR, navigate to the 'Supply Base Report' section and click on the relevant SBR on the list. This will open the SBR form. To download the SBR as a pdf, open the SBR form and click on the 'Report(pdf)' link.

9.2.2 Filling In peer review checklist

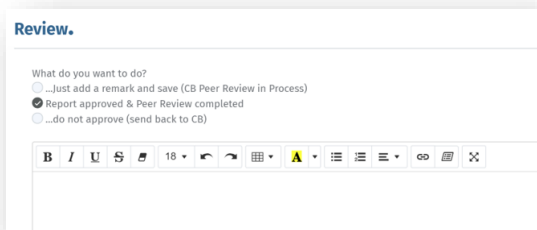
Peer Review standard checklist is integrated to the Audit Portal and can be accessed on the audit record. The checklist is only visible when the peer review for the audit is required, and the peer reviewer has been selected.

For each peer review, the Peer Reviewer is required to fill in a standard checklist.

The checklist consists of Yes/No/N/A options and optional comment fields. For each peer review question/comment field, there is a Certification Body response field, which allows CBs to provide Peer Reviewer additional clarifications in case the review recommendation is not to approve the reports.

- Peer review Date
- The clarity of presentation of the observations in the report as the basis for a certification decision – Yes/No
 - Peer reviewer findings: HTML box
 - Certification Body response: HTML box
- Stakeholder consultation requirements were followed – Yes/No/N/A
 - Peer reviewer findings: HTML box
 - Certification Body response: HTML box
- Competence of audit team was adequate – Yes/No
 - Peer reviewer findings: HTML box
 - Certification Body response: HTML box
- Determination of feedstock origin was audited properly – Yes/No
 - Peer reviewer findings: HTML box
 - Certification Body response: HTML box
- Risk Assessment quality and conclusions were audited properly – Yes/No
 - Peer reviewer findings: HTML box
 - Certification Body response: HTML box
- Effectiveness of risk mitigation was audited properly – Yes/No/N/A
 - Peer reviewer findings: HTML box
 - Certification Body response: HTML box
- The adequacy of the field work (time and sampling) as the basis for making a certification decision - Yes/No
 - Peer reviewer findings: HTML box
 - Certification Body response: HTML box
- The proposed certification decision is justified by the observations presented – Yes/No
 - Peer reviewer findings: HTML box
 - Certification Body response: HTML box
- **Peer Reviewer recommendation:** Certification approved/Certification not approved
 - Peer reviewer findings: HTML box
 - Certification Body response: HTML box

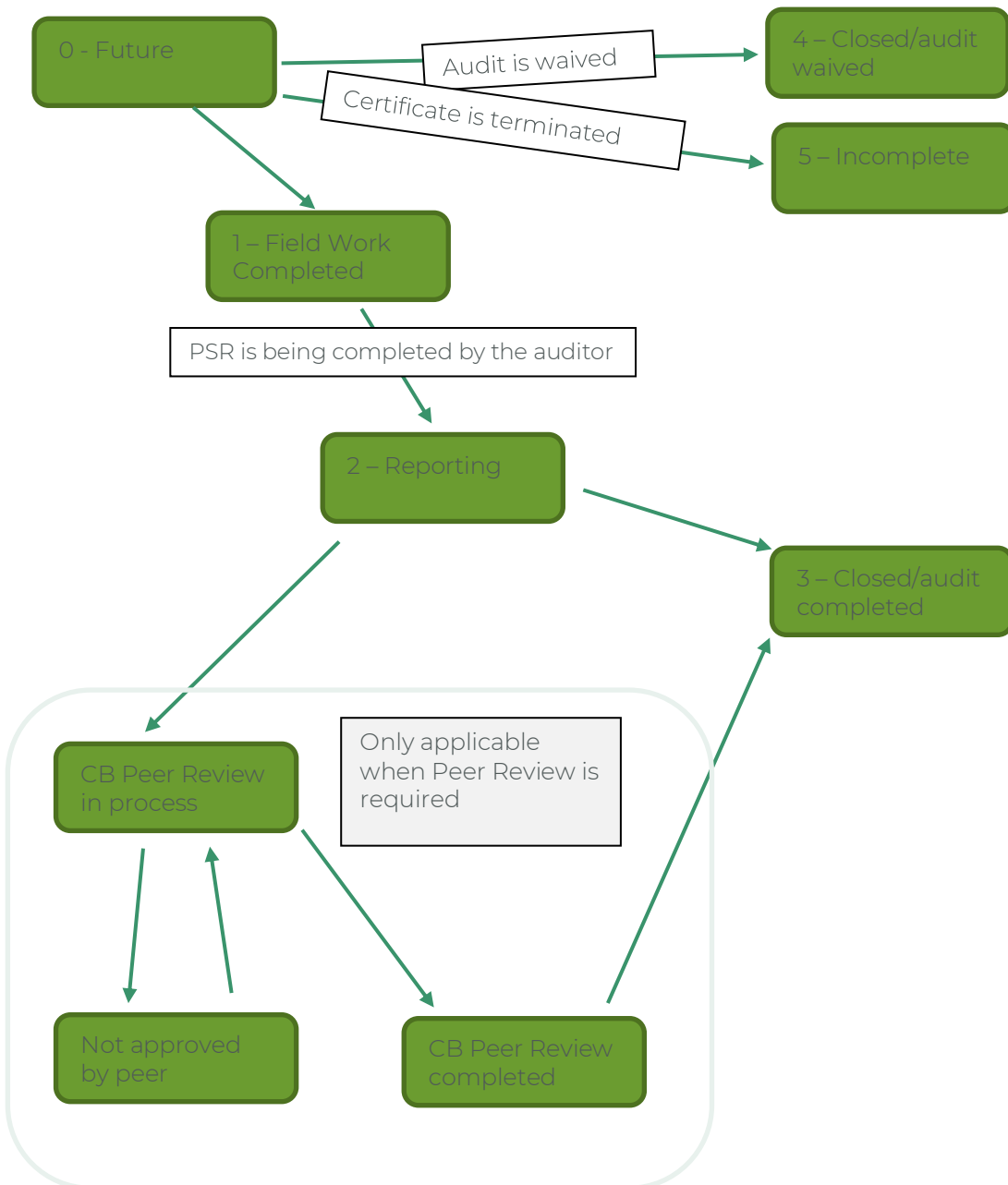
The peer review recommendation can be either ‘certification approved’ or ‘certification not approved’. Depending on the peer review outcome, Peer Reviewer should click the “Review” button on the audit record after filling in and saving the form and choose the next step.



In case the recommendation is positive, “Report approved & Peer Review completed” option should be chosen. This will then update the audit to the “CB Peer Review completed” status and the Certification Body is notified by email about the positive peer review outcome.

In case the recommendation is not to approve the reports, “...do not approve (send back to CB)” option should be used by the Peer Reviewer. This notifies the Certification Body about this decision, the audit is updated to the status “Not approved by peer reviewer” and the Certification Body is required to update the reports based on the Peer Review comments. Depending on the specific case, this might include updating the SBR, PSR or provide additional clarifications in the Peer Review checklist. After these updates are done, the Certification Body should open the Audit record and re-submit the Audit to the Peer Reviewer for another review. The audit is only considered completed, if the Peer Reviewer has indicated a positive certification recommendation and has updated the audit to “CB Peer Review completed” status.

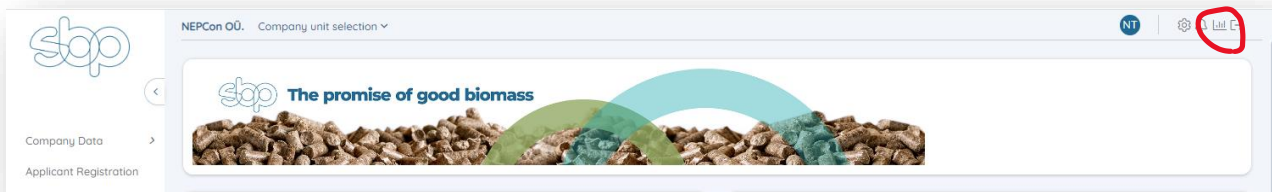
9.2.3 Audit workflow



10 Data reporting

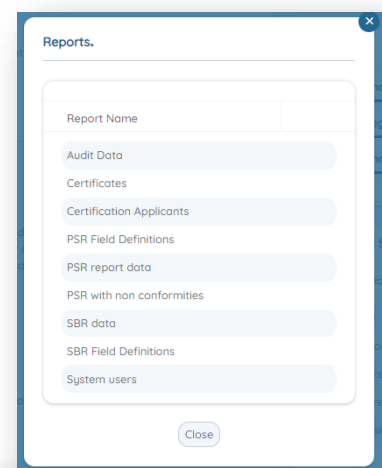
Users can generate data reports on different levels depending on their user permissions.

Chainpoint BI can be accessed by clicking on the  button on the top right section of the screen:



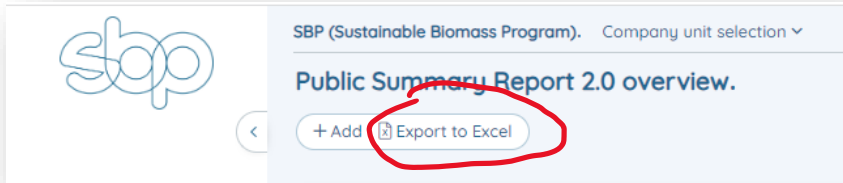
This will open a list of available reports for the specific user.

Clicking on the report name will open the report directly in the Audit Portal. To download the report, click on the save button and choose the download format:

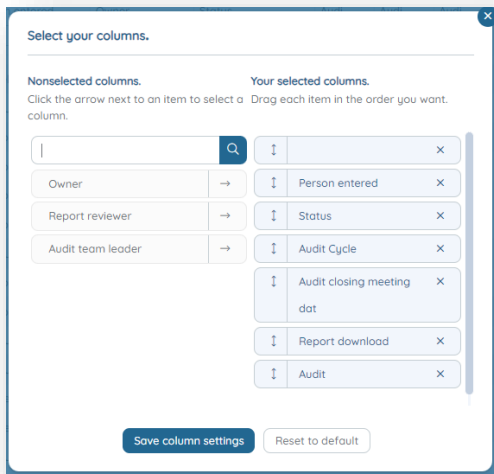
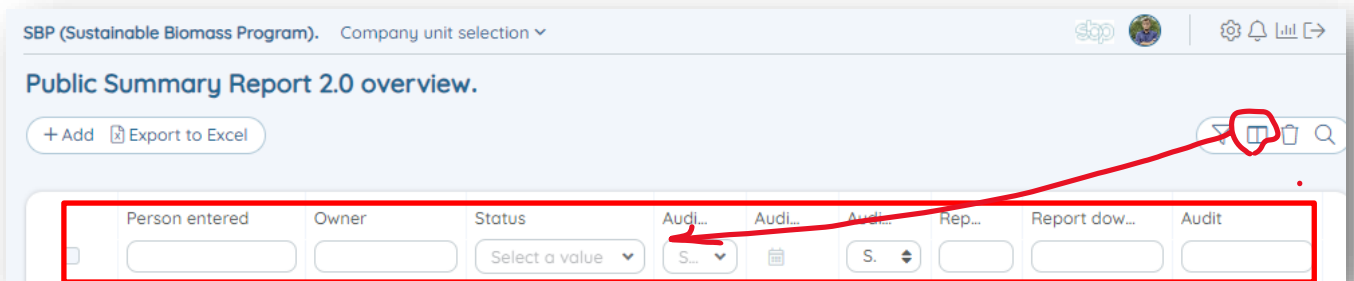


Certificate Holder	Certificate Status	Certificate Code	
Blue Point Pellets Denmark ApS	Terminated	SBP-06-17	XML file with report data
Pusbroliai UAB	Active	SBP-07-39	CSV (comma delimited)
Comsa Renovables	Active	SBP-08-16	PDF
Axpo Iberia S.L.	Terminated	SBP-07-13	MHTML (web archive)
Alameda Torrent S.L.U.	Active	SBP-06-27	Excel
Plantation Energy Australia Pty Ltd	Active	SBP-04-56	TIFF file
Granule 777, Inc.	Active	SBP-04-42	Word
RTK WP DEV Canada, ULC (Rentech – Wawa Facility)	Terminated	SBP-03-18	LLP

Another option to export data is to navigate to the section which you want to export information from – for example “All PSRs” and click on “Export to Excel” option. This will export all data visible in the current view to an Excel worksheet.



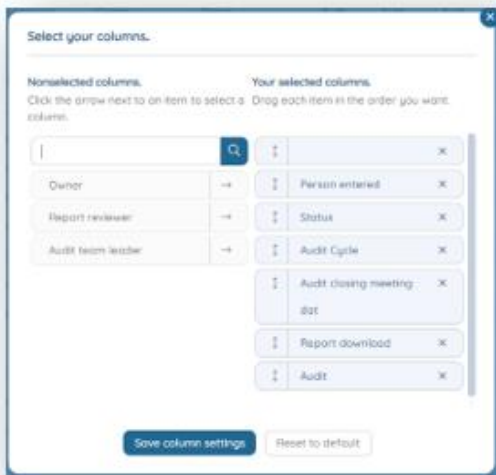
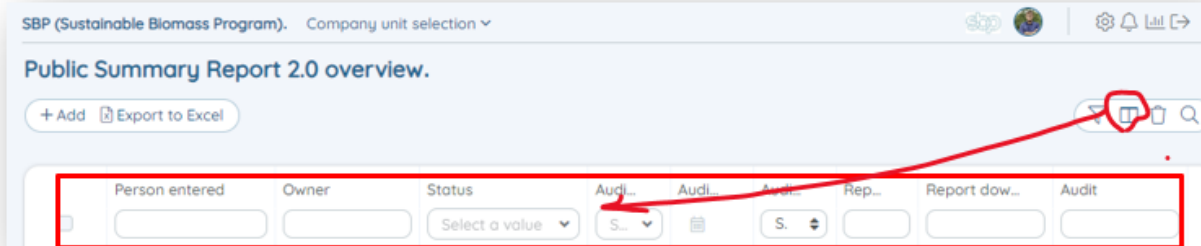
Before exporting data with this method, you may change which data columns are displayed and included in the export:



11 Customising list views

Each user can customise the order of data columns and choose which data to show on pages such as Certificates, Audits, PSRs, SBRs or applicants.

To change the order of displayed columns, simply drag the column to the desired location. To change which columns are shown, click on the 'Select columns' button. You can also reorder the columns shown in the column selector view.



12 Dashboards

The Home page dashboards are shown after logging in to the Portal and include the main items of interest. By default, this includes a message board, list of tasks and support desk contacts. The dashboards are dynamic, meaning different user groups may see different components and visible dashboards may also change depending on the current status of SBP audits, certificates, etc.

For example, the dashboard may show users a list of open SBP audit non-conformities with due dates, a list of expiring certificates or upcoming audits, overdue audits or the most recent new applicants etc.

Dashboard content cannot be changed directly by Portal users. Please submit any comments, ideas or requests for new dashboard items to portal@sbp-cert.org.

13 Support

Please submit all questions and enquiries regarding the SBP Audit Portal to: portal@sbp-cert.org

With urgent enquiries, please contact us by phone (+372 58 601 229).