



# **SIZA DATA PLATFORM**

## **AUDIT BODY MANUAL**

V1.0 Feb 2016

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# 1. Introduction

The SIZA Data Platform has recently been launched, allowing members to interact with SIZA through this new platform. This manual will assist you, the member, to understand how various sections of the data platform works. The various screens and sections are broken down as per the table of contents to allow you to view and understand the instructions related to a particular section at a time. While this manual acts as a guideline to allow you to interact with the platform, it may not answer to specific problems you may encounter. Should you require any additional, please contact the SIZA administrator ([info@siza.co.za](mailto:info@siza.co.za))

It is important to know that the system works most effective when Google CHrome is used as a browser. DO NOT USE Internet Explorer.

Take care when uploading images to ensure that the size of images and documents is reduced as this will have an impact on the speed of synchronization.

Your audit will be saved at all times when working online. When working offline it is only saved on your local drive.

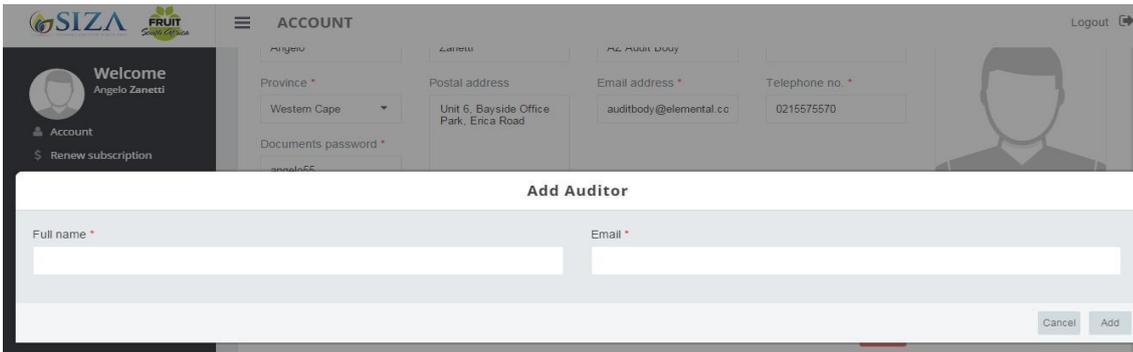
## 2. Account Section

The screenshot displays the 'Account' section of the SIZA Data Platform. The user is logged in as Angelo Zanetti. The page shows account details for account number 7027091115011352. Key information includes: Account expires on 2016-11-23, Industries: Citrus, Member type: Level 7, VAT no.: -, and Registration no.: -. The user's profile information is shown, including first name (Angelo), last name (Zanetti), business/association (AZ Audit Body), trading name, province (Western Cape), postal address (Unit 6, Bayside Office Park, Erica Road), email address (auditbody@elemental.co.za), and telephone number (0215575570). There is a section for adding and managing auditors, schedulers, and reviewers. The 'Add Auditor' button is highlighted with a red '5', 'Add Scheduler' with a red '6', and 'Add Reviewer' with a red '7'. The 'Update' button at the bottom right is highlighted with a red '4'. The left sidebar contains a 'Renew subscription' button highlighted with a red '1'.

Figure 1

- Once you have logged into your profile, the navigation menu will be present in the left hand side column.  
In order to renew your subscription, you will need to click the **Renew Subscription Button**. This will take you to the payment gateway where you can make payment for your subscription amount via credit, debit or EFT payment. For EFT payments please ensure that you email the proof of payment to [info@siza.co.za](mailto:info@siza.co.za)
- This is an additional navigational section which allows you to view where you are within the platform and allows you the ability to navigate to other sections of the platform. It also displays which section you are currently in, within the system.
- The logout button is ever present on the top right hand corner, for you to log out of your profile. Ensure you always log out of the platform
- You can update your profile by updating the various fields. For the update to take effect hit the **Update**
- You can manage multiple auditors in this section.
- You can manage multiple schedulers in this section.

7. You can manage multiple reviewers in this section.



The screenshot displays the SIZA ACCOUNT interface. At the top left, there are logos for SIZA and FRUIT. The main header area includes a 'Welcome' message for Angelo Zanetti, an 'Account' icon, and a 'Renew subscription' button. The account details section shows fields for Province (Western Cape), Postal address (Unit 6, Bayside Office Park, Erica Road), Email address (auditbody@elemental.co), and Telephone no. (0215575570). A 'Logout' button is visible in the top right corner. A modal window titled 'Add Auditor' is open in the foreground, featuring two input fields: 'Full name' and 'Email'. At the bottom right of the modal, there are 'Cancel' and 'Add' buttons.

### 3. Add users

1. When you click the **“Add Auditor”** button this will display a popup window that will allow you to enter the details of the new reviewer. Once entered and saved the system will email the auditor to inform them of their account creation.
2. When you click the **“Add Reviewer”** button this will display a popup window that will allow you to enter the details of the new reviewer. Once entered and saved the system will email the auditor to inform them of their account creation.
3. When you click the **“Add Scheduler”** button this will display a popup window that will allow you to enter the details of the new auditor. Once entered and saved the system will email the auditor to inform them of their account creation.