

# TEMPLATE OPERATING MANUAL



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## 2. ABOUT THIS MANUAL

- This Manual is intended for all users of the TAPA auditing Templates.
- It is divided into sections that reference audit type and the necessary steps to complete the audit tasks.
- The manual will be frequently updated to reflect improvements and knowledge gained when using the tool.
- **Precaution: Content of these Templates are copyright protected and cannot be reproduced in any way without the permission of TAPA EMEA.**

## TAPA Self Certification on New Template User Guide

Kindly follow these easy steps to Create, Share and Archive your Audits.

**System Requirement :** a. Microsoft Office

b. Microsoft Windows / Apple Product

### FSR 2020 Template

Step No.	Details to be Followed
	File Name : TAPA EMEA FSR 2020 Audit Form (Mother Sheet)
1	Copy it to a folder on your convenient
2	Open the file
3	File may ask to enable Micros and Edit mode, select ok and allow
4	File contains Different Sheets a. Instruction b. BI c. Central Function d. FSR Level A e. FSR Level B f. FSR Level C
5	Go to BI Sheet, Select it
6	Provide the required detail as mentioned
7	Kindly make a note of these fields 1. In the Audit Body You may kindly write "No" 2. Name of the Auditor will be "No" 3. Email Address : Contact person Email Address 4. Trained LSP AA Name : TAPA Authorised Trained Person of your organisation. 5. Audit Category : Please select as dropdown
8	Kindly remember not to answer those questions which are not for you Previous TAPA Tracking Number : Can be left blank if it's a new certification, if it is a Re-certification then kindly provide the earlier TAPA Tracking Number associated with your old audit.
9	Kindly remember not to answer those questions which are not for you Previous TAPA Tracking Number : Can be left blank if it's a new certification, if it is a Re-certification then kindly provide the earlier TAPA Tracking Number associated with your old audit
10	Audit Review Date and Audit Status is for TAPA Internal Use Only.
11	Row number 29 " Single Site Certification" is your last question to answer in BI Sheet Select the "FSR Level C" button
12	Upon Selecting the above button, a new sheet will be popup with following details on it.

13	Sheet Details are as Follows 1. Instructions 2. BI 3. FSR Level C
14	Please select FSR Level C
15	See all the details are automatically populated from BI Sheet to the FSR Sheet
16	Go to questionnaire section starting from Row number 33
17	On column C Row Number 33 you will select your answer as per requirement
18	On Column D you can provide / write the details you hold for this question
19	If you want to attach a file in any question, then the Shortcut key is provided in the Row Number 32 Column D (Red Colour)
20	Column E Row Number Starting from 32 to be filled by TAPA EMEA Official Team Only
20	For Waivers Follow These Steps 1. Go to BI Sheet 2. On the Right-Side Waiver is attached, Click That 3. Word File Will popup with waiver requirements 4. Fill all the required details and save it some folder 4. Attach that file as described in Point No. 19
21	For SCAR's Follow These Steps 1. Go to BI Sheet 2. On the Right-Side SCAR file is attached, Click That 3. Excel File Will pop up with SCAR requirements 4. Fill all the required details and save it some folder 4. Attach that file as described in Point No. 19
22	Upon Successfully Answering all the question kindly follow these steps 1. Save this file. 2. Rename as (Your Organisation name following with TAPA Standard with the TAPA Tracking Number). XYZ TAPA FSR C 30122XXXX. 3. Submit this entire Excel Sheet to TAPA EMEA ( <a href="mailto:satya.roy@tapaemea.org">satya.roy@tapaemea.org</a> ) on email attachment. 4. Upon proper validation and review of the document submitted 5. Email Communication with Certificate will be shared in due Course from TAPA EMEA
23	No Need to share the <b>mother sheet</b> (TAPA EMEA FSR 2020 Audit Form) with TAPA EMEA and No need to save the entry on it.

**\*\* If you have any doubts or query please feel free to contact ([Satya.Roy@tapaemea.org](mailto:Satya.Roy@tapaemea.org))**

### TSR 2020 Template

Step No.	Details to be Followed
	File Name : TAPA EMEA TSR 2020 Audit Form (Mother Sheet)
1	Copy it to a folder on your convenient
2	Open the file
3	File may ask to enable Micros and Edit mode, select ok and allow
4	File contains Different Sheets a. Instructions b. BI
5	Go to BI Sheet, Select it
6	Provide the required detail as mentioned
7	Kindly make a note of these fields 1. In the Audit Body You may kindly write "No" 2. Name of the Auditor will be "No" 3. Email Address : Contact person Email Address 4. Trained LSP AA Name : TAPA Authorised Trained Person of your organisation. 5. Row Number 22 Specify the TSR Category : Depending upon the Number of trucks provided it will automatically display (nothing to Change on it)
8	Kindly remember not to answer those questions which are not for you Previous TAPA Tracking Number : Can be left blank if it's a new certification, if it is a Re-certification then kindly provide the earlier TAPA Tracking Number associated with your old audit.
9	Kindly remember not to answer those questions which are not for you Previous TAPA Tracking Number : Can be left blank if it's a new certification, if it is a Re-certification then kindly provide the earlier TAPA Tracking Number associated with your old audit
10	Audit Review Date and Audit Status is for TAPA Internal Use Only.
11	Provide the details asked in the Row number starting from 24 to 33 "Audit information TAPA Detail" by selecting the dropdown "YES" in Column C Row Number starting from 24 to 33 match to your requirement
12	Row number 34 " Generate Sheet as per above choices" is your last question to answer in BI Sheet Select this button
13	Upon Selecting the above button a new sheet will be popup with following details on it.
14	Sheet Details are as Follows 1. Instructions 2. BI 3. As per your selection in Step Number 11
15	Please move to the sheet with your selections "e.g Rigid Van, Hard Sided Trucks...."

16	See all the details are automatically populated from BI Sheet to the requirement Sheet Remember not to enter anything in the Optional Enhancement Section as by Default its selected as NO
17	Go to questionnaire section starting from Row number 37
18	On column C Row Number 37 you will select your answer as per requirement
19	On Column D you can provide / write the details you hold for this question
20	If you want to attach a file in any question then the Shortcut key is provided in the Row Number 36 Column D (Red Colour)
21	Column E Row Number Starting from 32 to be filled by TAPA EMEA Official Team Only
22	For Waivers Follow These Steps 1. Go to BI Sheet 2. On the Right Side Waiver is attached, Click That 3. Word File Will popup with waiver requirements 4. Fill all the required details and save it some folder 4. Attach that file as described in Point No. 20
23	For SCAR's Follow These Steps 1. Go to BI Sheet 2. On the Right Side SCAR file is attached, Click That 3. Excel File Will popup with SCAR requirements 4. Fill all the required details and save it some folder 4. Attach that file as described in Point No. 20
24	Upon Successfully Answering all the question kindly follow these steps 1. Save this file. 2. Rename as (Your Organisation name following with TAPA Standard with the TAPA Tracking Number). XYZ TAPA TSR 3 30122XXXX. 3. Submit this entire Excel Sheet to TAPA EMEA (satya.roy@tapaemea.org) on email attachment. 4. Upon proper validation and review of the document submitted 5. Email Communication with Certificate will be shared in due Course from TAPA EMEA
25	No Need to share the <b>mother sheet</b> (TAPA EMEA TSR 2020 Audit Form) with TAPA EMEA and No need to save the entry on it.

**\*\* If you have any doubts or query please feel free to contact ([Satya.Roy@tapaemea.org](mailto:Satya.Roy@tapaemea.org))**

### PSR 2018 Template

Step No.	Details to be Followed
	File Name: TAPA EMEA PSR 2018 Audit Form ( <b>Mother Sheet</b> )
1	Copy it to a folder on your convenient
2	Open the file
3	File may ask to enable Micros and Edit mode, select ok and allow
4	File contains Different Sheets a. Instruction b. BI c. PSR Level 1 (IAB) d. PSR Level 2 (IAB) e. PSR Level 3 (IAB) f. PSR Level 3 (PPO/BPO) Self
5	Go to BI Sheet, Select it
6	Provide the required detail as mentioned
7	Kindly make a note of these fields 1. In the Audit Body You may kindly write "No" 2. Name of the Auditor will be "No" 3. Email Address: Contact person Email Address 4. Trained LSP AA Name: TAPA Authorised Trained Person of your organisation. 5. Audit Category: Please select as dropdown
8	Kindly remember not to answer those questions which are not for you Previous TAPA Tracking Number: Can be left blank if it's a new certification, if it is a Re-certification then kindly provide the earlier TAPA Tracking Number associated with your old audit.
9	Kindly remember not to answer those questions which are not for you Previous TAPA Tracking Number: Can be left blank if it's a new certification, if it is a Re-certification then kindly provide the earlier TAPA Tracking Number associated with your old audit
10	Audit Review Date and Audit Status is for TAPA Internal Use Only.
11	Row number 30 " Single Site Certification" is your last question to answer in BI Sheet Select the "PSR Level 3 (PPO/BPO) Self" button
12	Upon Selecting the above button, a new sheet will be popup with following details on it.
13	Sheet Details are as Follows 1. Instructions 2. BI 3. PSR Level 3 (PPO BPO) (Self Ct)
14	Please select PSR Level 3 (PPO BPO) (Self Ct)
15	See all the details are automatically populated from BI Sheet to the PSR Sheet
16	Go to questionnaire section starting from Row number 33
17	On column c Row Number 33 you will select your answer as per requirement



18	On Column D you can provide / write the details you hold for this question
19	If you want to attach a file in any question, then the Shortcut key is provided in the Row Number 32 Column D 9 (Red Colour)
20	Column E Row Number Starting from 32 to be filled by TAPA EMEA Official Team Only
20	For Waivers Follow These Steps 1. Go to BI Sheet 2. On the Right-Side Waiver is attached, Click That 3. Word File Will pop up with waiver requirements 4. Fill all the required details and save it some folder 4. Attach that file as described in Point No. 19
21	For SCAR's Follow These Steps 1. Go to BI Sheet 2. On the Right-Side SCAR file is attached, Click That 3. Excel File Will popup with SCAR requirements 4. Fill all the required details and save it some folder 4. Attach that file as described in Point No. 19
22	Upon Successfully Answering all the question kindly follow these steps 1. Save this file. 2. Rename as (Your Organisation name following with TAPA Standard with the TAPA Tracking Number). XYZ TAPA PSR 3 30122XXXX. 3. Submit this entire Excel Sheet to TAPA EMEA (satya.roy@tapaemea.org) on email attachment. 4. Upon proper validation and review of the document submitted 5. Email Communication with Certificate will be shared in due Course from TAPA EMEA
23	No Need to share the <b>mother sheet</b> (TAPA EMEA PSR 2018 Audit Form) with TAPA EMEA and No need to save the entry on it.

**\*\* If you have any doubts or query please feel free to contact ([Satya.Roy@tapaemea.org](mailto:Satya.Roy@tapaemea.org))**