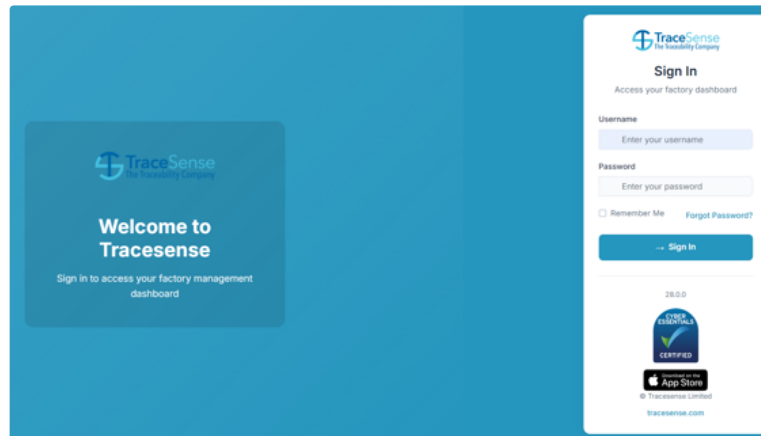


# SETTING UP CHECKS ON THE TRACESENSE PORTAL

In this guide we will look at Setting up Checks on the Tracesense Portal

Access the portal via <https://ferrero.tracesense.com/en-gb/>

Login to your account



## SETTING UP A CHECK FORM TEMPLATE

ADDING QUESTIONS DURING CHECK SET UP

SETTING UP QUESTIONS PRIOR TO CHECK SET UP

BASIC INFORMATION

QUESTION BEHAVIOUR

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MEDIA

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ADDING CHOICES TO A QUESTION

IMPORTING QUESTION FROM A CSV FILE

SCHEDULING A CHECK FROM THE QUALITY MENU

SCHEDULING A CHECK FROM THE CALENDAR

MOVING A CHECK TO ANOTHER DAY

DELETING A CHECK

DELETING ON THE CALENDAR

DELETING FROM THE QUALITY MENU

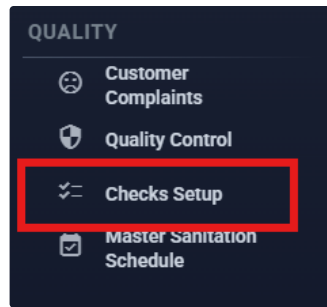
VIEWING SCHEDULED CHECKS

VIEWING CHECK INSTANCES ON THE CALENDAR

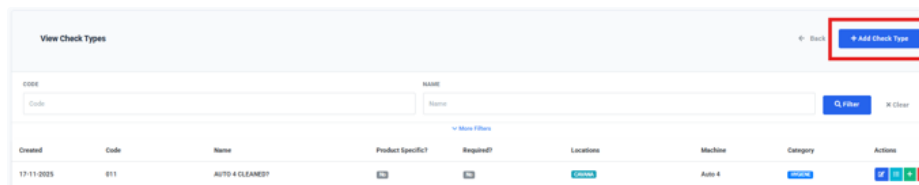
VIEWING CHECK INSTANCES FROM THE QUALITY MENU

## SETTING UP A CHECK FORM TEMPLATE

In order to schedule a check it must first be set up as a check form template, in order to access this from the sidebar menu, navigate to the 'Quality' section and then select 'Checks Setup'



Now select the '+Add Check Type' button to setup a new check



This will open the Check Type Form with the below details able to be filled in to set the check up

Basic Information	Code	Enter the code of the check type (must be unique)
	Name	Enter the name of the check type
	Category	Quality / Production / H&S / Maintenance / Hygiene/ Machine / Oven / Wrapping / Other / QC Check
	Machine	Select the machine - If check is for specific machine
Schedule & Timing	Is Check Type scheduled	Yes / No
	Exclude Saturday	Yes / No
	Exclude Sunday	Yes / No

	Expected Hours	Enter the expected hours for the check
	Check Occurrence Time (minutes)	Enter the time threshold in minutes. If set and > 0, checks if last check was completed within this time period. If exceeded, prompts for reason.
	Is Open Ended	Yes / No
	Open Ended Frequency (minutes)	Enter the frequency in minutes. If empty, the check will not prompt for next check.
Check Configuration	Is Product Specific - Will be selected as part of a Requirement	Yes / No
	Is Recipe Select Only - Will only show the recipe select screen and not be part of a PO	Yes / No
	Is Area Check	Yes / No
	Is Check Required	Yes / No
	Is Start-up Check	Yes / No
	Start-up Recurrence (hours)	For start-up checks only: require this check again every this many hours (e.g. 8 for per-shift, 12 for day/night).

		Once lapsed, user must give a reason before starting again.
	Use plant shift start times	For start-up checks: when set, require this check again at each shift start (from plant Production Shifts). If startup was not done since the current shift start (e.g. 06:00 dayshift, 14:00 backshift), it is forced again.
	CCP Check Type	Yes / No
Locations & Files	Production Locations	Select the production locations
	Files	Select the files associated to the check (if available)
Template Questions	Add Questions:	Either create new questions during the check setup using 'Create New Question' button / Add questions already added via the quality menu by using search box to find and add questions
	Enable Ordering	use this feature to drag and drop the order of

**Check Type Template**

Define the form structure and questions that all checks of this type will inherit.

**Basic Information**

Code  Name  Category  Machine

**Schedule & Timing**

Is Check Type scheduled  Exclude Saturday  Exclude Sunday  Expected Hours  Check Occurrence Time (minutes)  Is Open Ended  Open Ended Frequency (minutes)

**Check Configuration**

How this check is used (products/area/required) and start-up behavior.

Is Product Specific - Will be selected as part of a Requirement  Is Recipe Select Only - Will only show the recipe select screen and not be part of a PO

Is Area Check  Is Check Required

**Start-up options**

Is Start-up Check  Start-up Recurrence (hours)  Use plant shift start times  CCP Check Type

**Locations & Files**

Production Locations

Files

**Template Questions**

Template questions

Add Questions:

Search and select a question to add...

No questions selected. Use the dropdown above to add questions.

Select the default questions that new checks will inherit

### ADDING QUESTIONS DURING CHECK SET UP

To add a question to a check whilst setting up the check, whilst at the Add Questions section select the green 'Create New Question' button

Add Questions:

Search and select a question to add...

A pop up will appear to 'Create New Question'

Numeric Question - select this if the answer to the question is numerical

Initials Question - select this if you want the person completing the check to add their initials to the answer

ANSWER TYPES - the relevant answer types for Hygiene checks would be

Free text answer

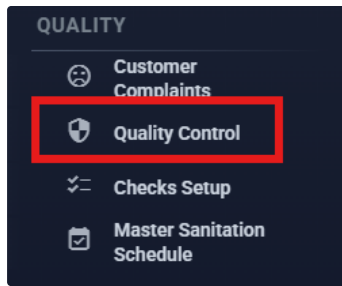
Signature Question - this requires a signature as a response to the question

Image Question - this requires an image to be taken as a response to the question

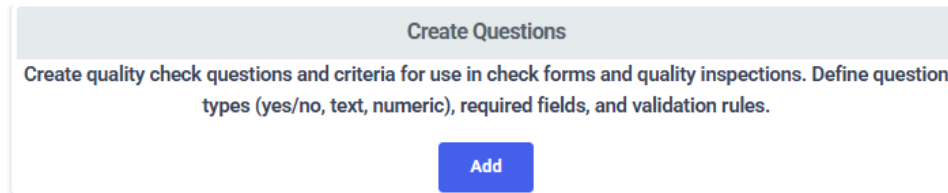
#### SETTING UP QUESTIONS PRIOR TO CHECK SET UP

Questions can also be set up via the Quality section on the portal, this means you will only need to search and add the questions

To set up the questions before setting up the check, head to the side menu and select 'Quality Control'



Then select the 'Add' option under the 'Create Questions' section



You will now be taken into the Question Form, the relevant sections to fill in on this page for Hygiene Checks are:

**BASIC INFORMATION**

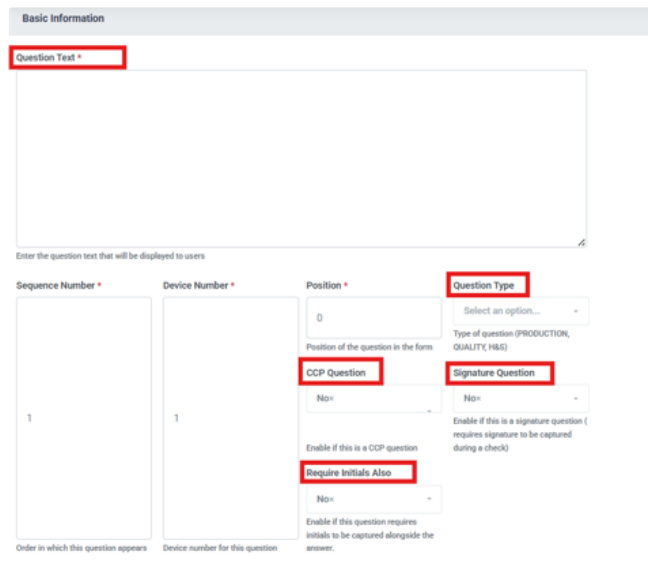
Question Text - input the question here

Question Type - set for Hygiene

CCP Question - set to yes if this is a CCP question

Signature Question - set to yes if you require a signature as part of the response

Requires Initials Also - set to yes if you want initials as a response

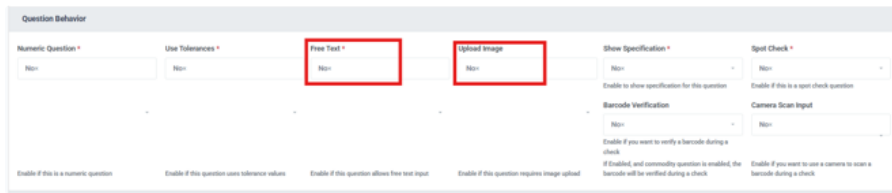


**QUESTION BEHAVIOUR**

In this section you will only have 2 relevant sections for question response choices for hygiene

Free Text

Upload image



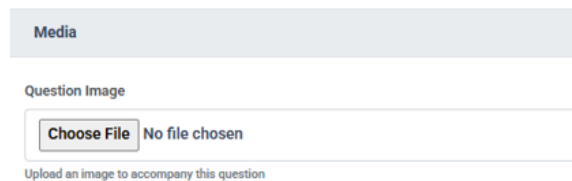
### ASSOCIATED FILES

In this section you can associate files (SOP , CIC) to the question, use the 'Select an Option' box to find the relevant files



### MEDIA

In this section you can add an image that may be relevant to the question

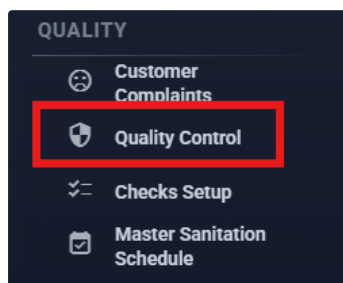


After setting up the requirements for the question remember to hit 'Save Question'

Save Question

### AMENDING A CURRENT QUESTION

To amend a current question, head to the side menu and select 'Quality Control'



Then select the 'View' button under the 'View Questions' section

**View Questions**

View and manage all quality check questions in the system. Edit questions, review question types, see usage statistics, and organize questions by category or check type.

[View](#)

then find the question you want to amend and from the Menu buttons next to the question pick the Orange 'Edit' button to edit the question

Created	Sequence	Question	For Category	CCP Question	For Commodity	For Recipe	Global	Type	Menu
27-11-2025	1	Cavana- Auto 4 cleaned?	None	No	None	None	Yes	HYGIENE	

**Menu**

This will take you into the Question Form where you can edit the question

### ADDING CHOICES TO A QUESTION

From the 'View Questions' section, see above section on amending a question to find this section.

To add questions choices select the blue 'Add Choices' button from the Menu buttons next to the question you are adding choices to

**Menu**

Then select the 'Add Question Choice' button at the top

QUESTION: Cavana- Auto 4 cleaned?

[Return to Questions](#) [Enable Sorting](#) [Save Sequence](#) [Add Question Choice](#) [Cancel](#)

Position	Choice	Is Numeric	Average Weight Check	Menu
No question choices added...				

You will then be taken into a screen to set the 'Choice',

Is Choice Numeric:  
No

Choice:

Position:  
1

Average weight check:  
No

Delete:

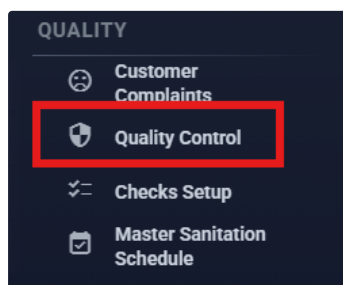
Set the choice then hit 'Save'

If you have multiple choices and you want to sort them in a specific order, you can do this by setting the position number when adding the choice or you can select the choice and then drag and drop into place, to do this select the 'Enable Sorting' button, sort the choices into the order you want and then you must select 'Save Sequence'.

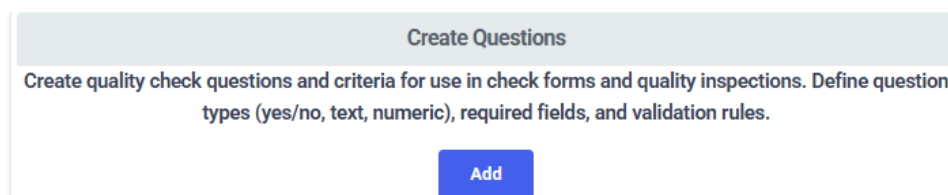


## IMPORTING QUESTION FROM A CSV FILE

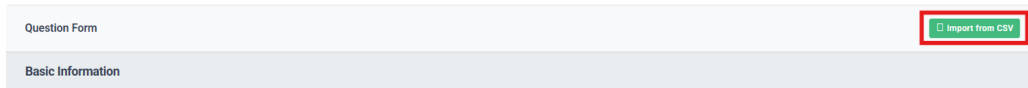
Questions can be imported into the system by uploading them via a csv, this can be done from the Question Form section, to access this section, head to the side menu and select 'Quality Control'



Then select the 'Add' option under the 'Create Questions' section



You will now be taken into the Question Form, to import select the green 'Import from CSV' button



The CSV must be in an exact format to be able to upload,

**CSV Format Requirements**

**Required columns:**

- `question` - Question text (required)
- `sequenceno` - Sequence number (default: 1)

**Optional columns:**

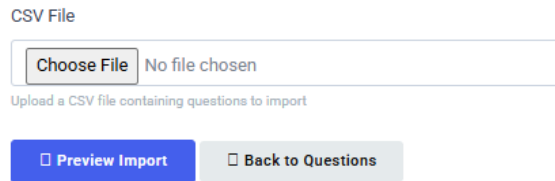
- `recipe_code` - Recipe code (e.g., F5328) - will lookup recipe by code
- `ingredient_code` - Ingredient/Commodity code
- `ingredient_category` - Ingredient category name
- `prod_area` - Production area name
- `assign_to` - Department name
- `for_machine` - Machine name
- `question_type` - Question type (PRODUCTION, QUALITY, H&S, etc.)
- `device_no` - Device number (default: 1)
- `position` - Position (default: 0)
- `numeric` - Numeric question (True/False)
- `use_tolerances` - Use tolerances (True/False)
- `target_quantity` - Target quantity (if numeric and use\_tolerances)
- `lower_limit` - Lower limit (if numeric and use\_tolerances)
- `upper_limit` - Upper limit (if numeric and use\_tolerances)
- `freetext` - Free text (True/False)
- `upload_image` - Upload image (True/False)
- `show_spec` - Show specification (True/False)
- `spot_check` - Spot check (True/False)
- `audit_question` - Audit question (True/False)
- `ccp_question` - CCP question (True/False)
- `barcode_verification` - Barcode verification (True/False)
- `camera_scan_input` - Camera scan input (True/False)
- `signature_question` - Signature question (True/False)
- `require_initials_also` - Require initials also (True/False)

**Note:** If a question with the same text exists, it will create a new version and mark the old one as not latest.

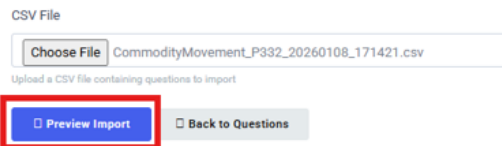
**Example CSV:**

```
question,sequenceno,recipe_code,question_type,ccp_question,numeric,use_tolerances
What is the temperature?,1,F5328,QUALITY,True,True,True
Is the batch complete?,2,F5328,PRODUCTION,False,False,False
```

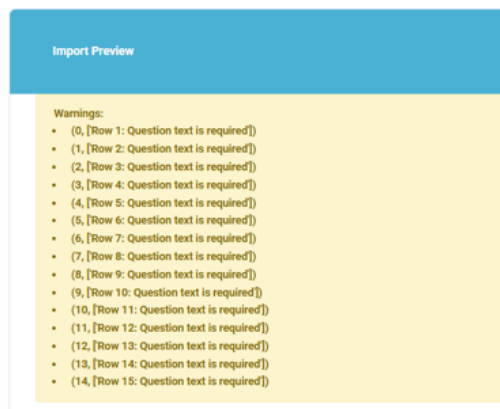
Once you have created your CSV and are ready to import, select the choose file option and then select the relevant CSV file to be uploaded



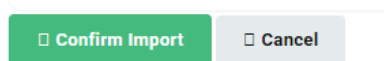
After selecting the file select 'Preview Import', if there are any errors with the sheet it will flag at this point



If the file has errors in its format the system will tell you at this point, please see the example below

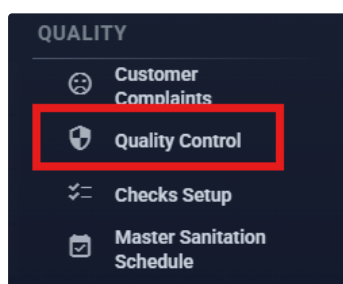


If no errors appear then scroll to the bottom and select 'Confirm Import'

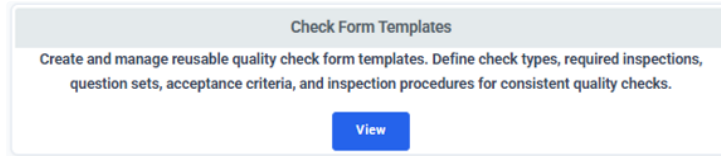


## SCHEDULING A CHECK FROM THE QUALITY MENU

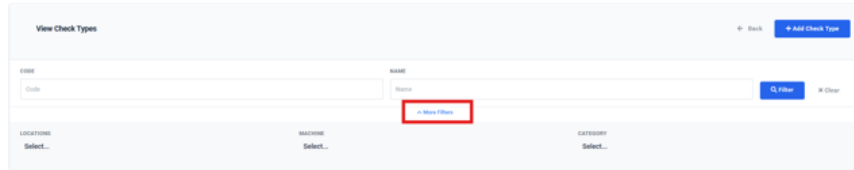
Once logged in, from the side menu find and select the 'Quality Control' tab



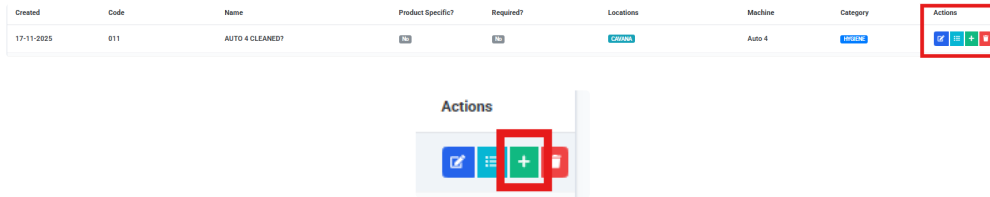
Then select the 'View' button under the 'Check Form Templates' option



You can now find the check you wish to schedule using the search feature to search by Check Code / Check Name, you can also open more filters to search by Locations/Machine/Check Category



Once you have found the check you want to schedule, from the action buttons at the side select the green 'Add Check' button.



Now set up the schedule for the check:

Check

Schedule Frequency:

Enter the schedule frequency

Auto schedule:

Start Date:  
  
Format: YYYY-MM-DD

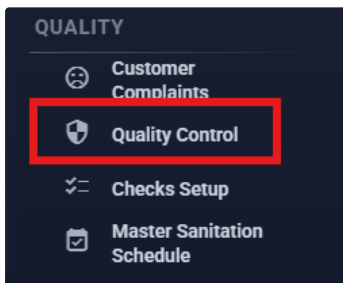
End Date:  
  
Format: YYYY-MM-DD

Schedule Frequency - Daily/Weekly/Monthly/Fortnightly

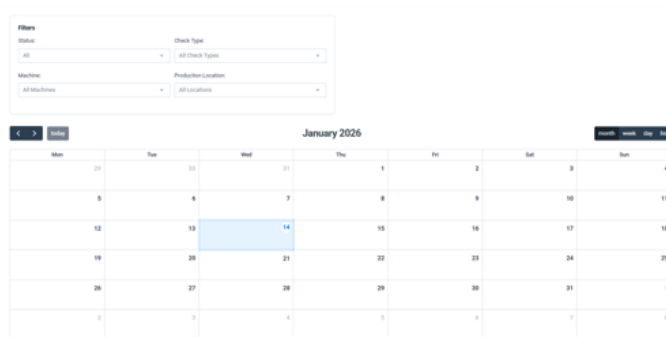
Auto Schedule - If set to yes then depending on the frequency you choose it will automatically schedule the next job within the start and end date set.

### SCHEDULING A CHECK FROM THE CALENDAR

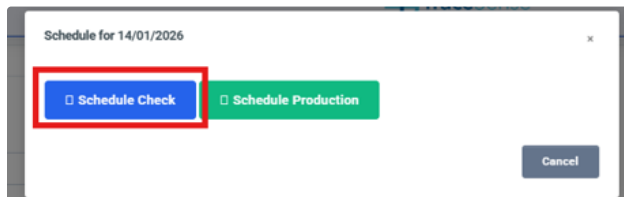
From the sidebar menu, find the 'Scheduling' section and select the 'Calendar'



Now from the calendar select the day you want to schedule you check for and click on it



After selecting the day a pop up will appear with 2 options, Schedule Check and Schedule Production. Select the Schedule Check option,



a further pop up will appear where you can set the check up

**Schedule Check**

Check Type \*

Click to search check types...

Only scheduled, non-product-specific check types are shown

Start Date \*

14/01/2026

End Date \*

14/01/2026

Schedule Frequency \*

Daily

Checks will be created for each occurrence between start and end dates

Auto Schedule

No

If enabled, new checks will be automatically created after completion

Cancel Schedule Check

You can use the box under the check type option to search either through the list of checks or by starting to type the check name or code in to the box and it will filter down

Once you have filled in the details remember to hit Schedule Check, the check will now be scheduled on the calendar

January 2026						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14 CHECK #11 - AUTO SCHEDULED CHECK	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

## MOVING A CHECK TO ANOTHER DAY

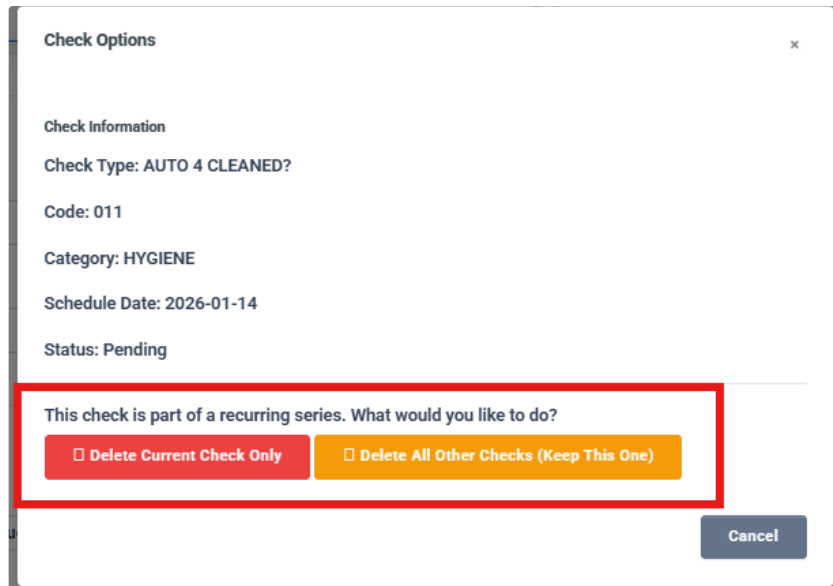
If you want to change the day the check is scheduled for then the easiest way to do this is from the calendar, all you need to do is select the check and drag and drop it to the day you want to move it too

## DELETING A CHECK

There is 2 ways to delete a check, either by the calendar or the quality menu

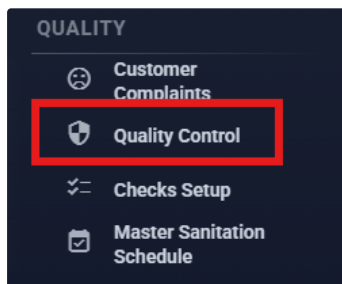
### DELETING ON THE CALENDAR

to delete a job via the calendar select the job on the calendar, a pop up will appear with 2 options, you can either delete the current check you are looking at, or, if you have the checks set up on auto schedule you can delete all further checks whilst keeping the current one.

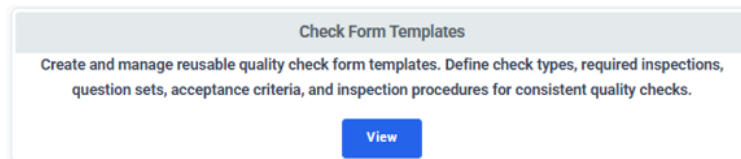


## DELETING FROM THE QUALITY MENU

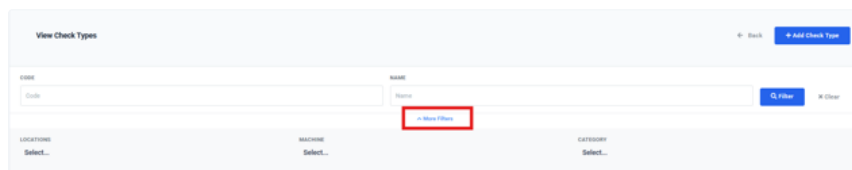
To delete a check from the quality menu, on the sidebar menu find and select 'Quality Control'



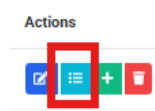
then select 'View' check form templates



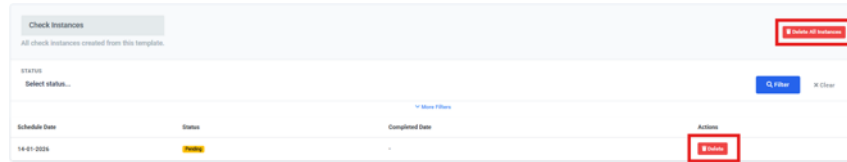
You can now find the check you want delete using the search feature to search by Check Code / Check Name, you can also open more filters to search by Locations/Machine/Check Category



Once you have found the check you want to delete, from the action buttons at the side select the blue 'View Checks' button.



At the bottom of the page you will see all the scheduled instances of the check, from here you can delete all the instances or the individual instance

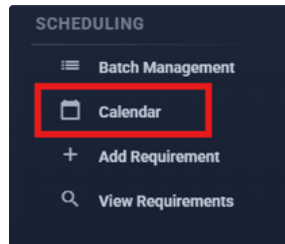


## VIEWING SCHEDULED CHECKS

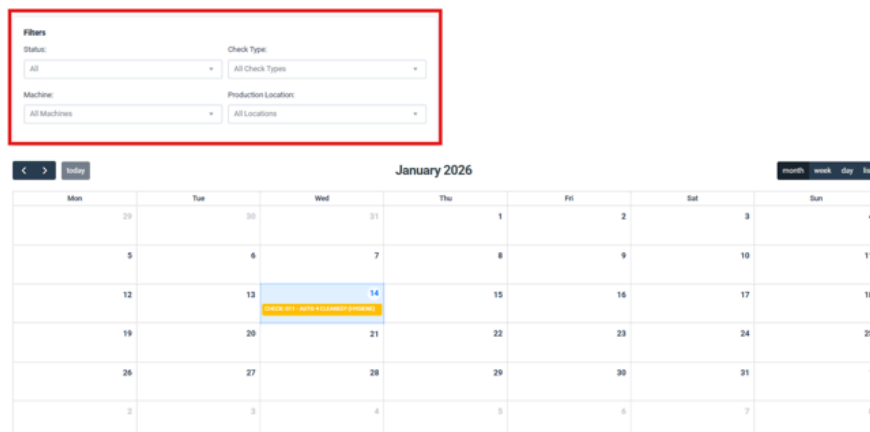
there are 2 ways of viewing scheduled checks, via the calendar or the Quality menu

### VIEWING CHECK INSTANCES ON THE CALENDAR

to view scheduled checks on the calendar, from the sidebar menu, find the 'Scheduling' section and select the 'Calendar'

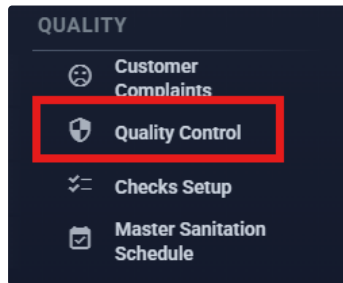


You can find your check by simply looking through the calendar, however if there are lots of jobs scheduled then it may be better to use the filters by Status of the job / check type / machine / location

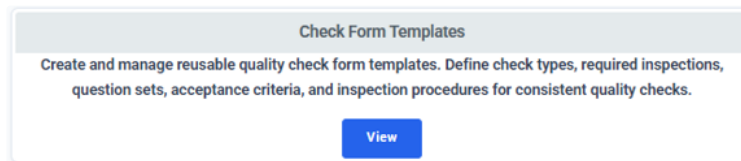


## VIEWING CHECK INSTANCES FROM THE QUALITY MENU

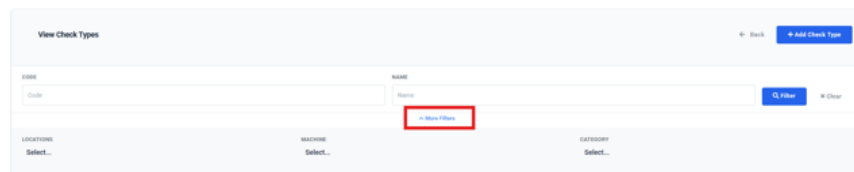
To view a check from the quality menu, on the sidebar menu find and select 'Quality Control'



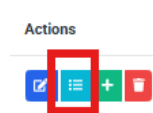
then select 'View' check form templates



You can now find the check you want to view using the search feature to search by Check Code / Check Name, you can also open more filters to search by Locations/Machine/Check Category



Once you have found the check you want to view, from the action buttons at the side select the blue 'View Checks' button.



At the bottom of the page you will see all the scheduled instances of the check

