TOOL USER GUIDE

DOCUMENT REQUEST MANAGER

VERSION 1.6

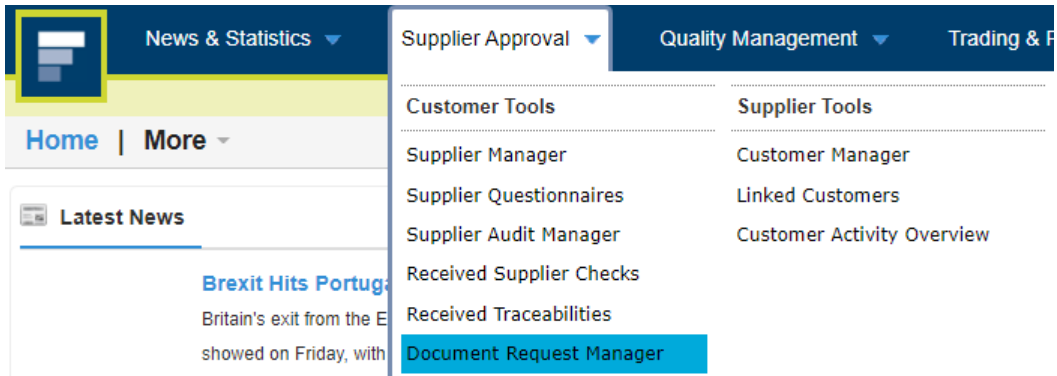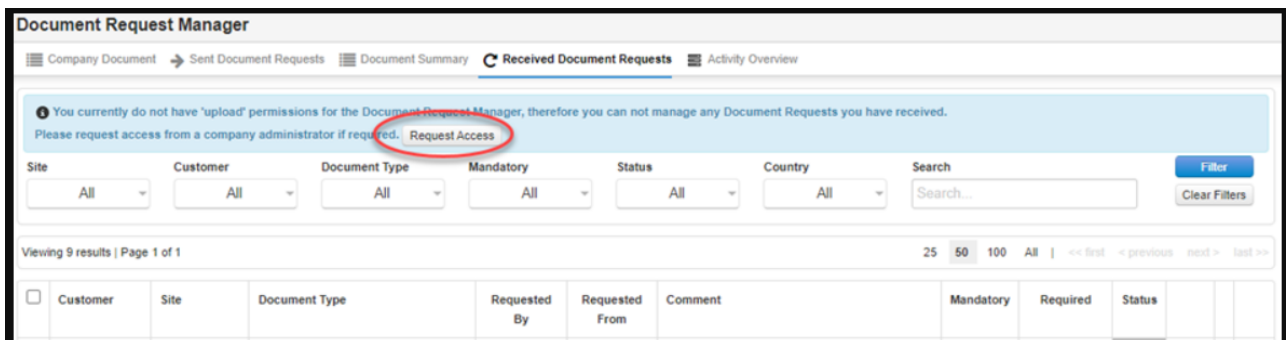# CONTENTS

1. INITIAL SETUP OF SUPPLIER DOCUMENT MANAGER

1.1 INITIAL SET UP

Step 1: Select *Document Request Manager* from the Supplier Approval tab.

Should you not have the correct access to this module, access can be requested by click on Request Access as per below. This will send an email to your company admin to action.

Step 2: Summary of each of the tabs within *Document Request Manager*

Note: some of the tabs below may not be visible due to subscription / admin rights.
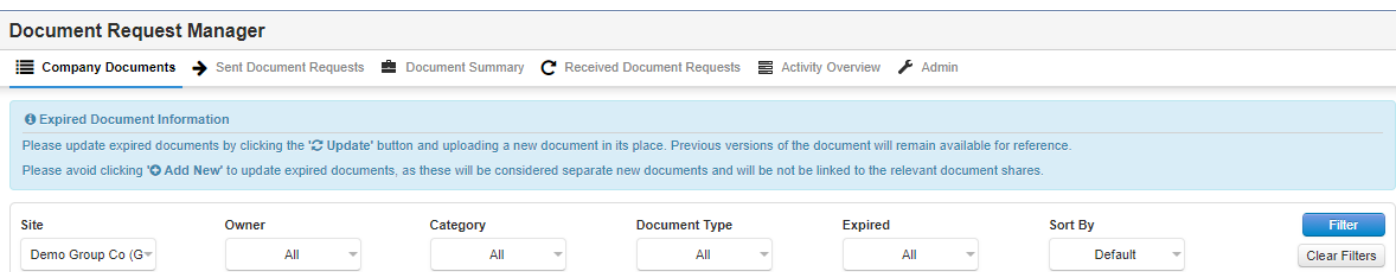
1. **Company Documents**   ☰ Company Documents
   a. This is where each of your internal company documents should be uploaded.
   b. Once the documents have been uploaded, these can be shared with your customers.

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2. **Sent Document Requests** → Sent Document Requests
   a. This is a summary of all the documents which has been requested from you to other users or suppliers.
3. **Document Summary** 💼 Document Summary
   a. This is an overall summary of each of the documents which has been requested, received etc. with compliancy info as well as the ability to filter using various search options.
4. **Received Document Requests** ↻ Received Document Requests
   a. When a customer requests a new document from you, it will appear here for you to upload.
5. **Activity Overview** ▤ Activity Overview
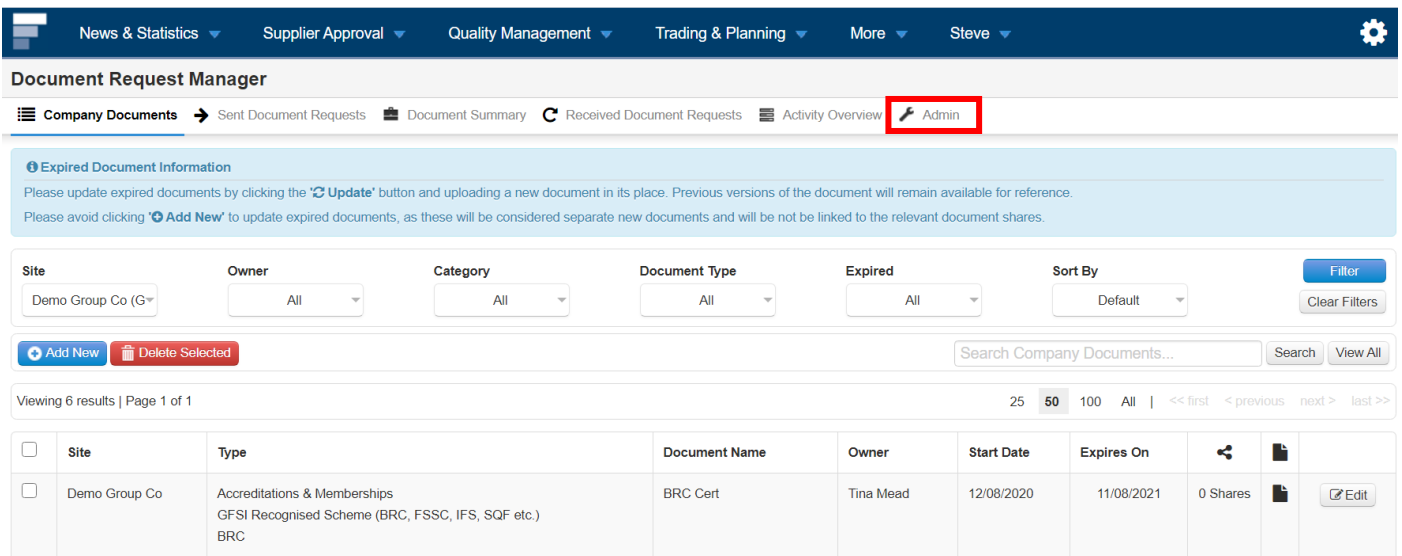   a. This is a summary of all the activities which have been carryout within this tool.
6. **Admin** 🔧 Admin
   a. This is the administration section for this tool.

1.2 SETTING VISIBLE COLUMNS

Visible columns allow you to set what fields from the documents are visible in the main table that displays your document library. *Please Note these are only applicable when you have a subscription to Supply Chain Manager*

Step 1: Select *Admin*

Step 2: Then select *Visible Columns* on the left. From here you can select what columns you want to show in the main table by selecting them.

Step 3: Once done, select *Save Settings*

2. COMPANY DOCUMENTS

This section allows you to upload all relevant company documents which can then be shared with your customers. Examples of the types of documents which can be uploaded are as follows:

- Accreditations & Memberships
- Factory Documents
- Product Approval

2.1 UPLOADING A COMPANY DOCUMENT

To upload a new company document, follow the steps below:

Step 1: Go to the *Company Documents* and click on *Add New*

Step 2: Fill in the required details as below and click on **Save**

Document Request Manager - Edit Document	← Back

☰ Company Documents → Sent Document Requests 🗎 Document Summary ↻ Received Document Requests ☰ Activity Overview 🔧 Admin

Associated Site	Demo Group Co (Group) ▾	← **Choose the relevant site(s)**
Document Name		← **Add document name**
Document Owner	-- Select -- ▾	← **Choose the document owner**
Category	Accreditations & Memberships ▾	← **Add the relevant category**
Document Type	--Please Select-- ▾	← **Choose the document type**
Document Grade	-- N/A -- ▾	← **Add the document grade (if applic.)**
Start Date	📅 (If not applicable then leave blank)	← **Add start date (if applic.)**
Expiry Date	📅 (If doesn't expire then leave blank)	← **Add expiry date (if applic.)**
Certificate Number		← **Add cert number (if applic.)**
Attach Document (Maximum Size: 50MB)	⬆ Upload File No file selected	**Upload File** Document file required? No
	Save Cancel	← **Once complete click on save**

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2.2 UPDATING AN EXPIRED COMPANY DOCUMENT

When a company document is due to expire a notification will be sent to the owner of the document to update to a new version. Follow the steps below to update a company document.

Step 1: Click on the Update modal as below to open the document details.

Step 2: To update the document, follow the steps below:

- Change the expiry date to the date of the new document.
- Click on Update Expired Document and choose the new document.
- **Click on Save**
- All previous versions of the document will be saved and can be previewed.

2.3 EDITING A COMPANY DOCUMENT

Step 1: Select Edit to update the document or document details (you can also update the owner)

Step 2: Once you have updated the details Select Save

2.4 DELETING A COMPANY DOCUMENT

Step 1: To delete a document, select the one you want to delete, then select *Delete Selected*

3. DOCUMENT REQUEST

3.1 REQUESTING A NEW DOCUMENT FROM YOUR SUPPLIER/S

To request a document from a supplier(s) you must select all the required supplier(s). This is done by ticking on the box to the left of the Supplier Name.

1) Go to **Document Summary**

2) Choose the relevant suppliers.

3) Select *Multi Request*

4) Complete the requested info

3.2 REQUESTING A DOCUMENT AND RESPONDING TO A DOCUMENT REQUES

3.2.1.   ADD NEW DOCUMENT REQUEST

1.   Select '**Supplier Approval'** and select '**Document Request Manager'** from dropdown

2.   Select '**Document Summary'**

3.   Select **Multi request**

	Total Requested	Total Uploaded	Total Outstanding	Total Marked Not Applicable	Total Expired	Suppliers Compliant	Suppliers Non-Compliant
	56	78.57 %	12.5 %	0 %	8.93 %	83 (89.25 %)	10 (10.75 %)

	Supplier Name		Requested	Uploaded *In Date*	Uploaded *Expired*	Uploaded *Info Requested*	Outstanding	Supplier Marked N/A	Manual Docs *Uploaded/Expired*	Compliance Status
☐	Abattoir 1 (US 323232)	View	3	2	0	0	1	0	1 / 1	✖

4.   Complete the details as per below and select **request**

**Document Request Manager - Multi Request**   ← Back

Company Documents → Sent Document Requests 🚢 Document Summary C Received Document Requests ▤ Activity Overview 🔧 Admin

Site	Multiple Sites (Group)	
Category	Accreditations & Memberships ⌄	← Choose Category
Document Type	Aberdeen Angus Scheme ⌄	← Choose Document Type
Comments	Comments relating to the required document...	← Add any comments
Mandatory	Yes	← Choose if Mandatory – Yes or No
Must have Expiry Date	Yes	← Choose if Document has an expiry date – Yes or No
Must have Document Grade	No	← Choose if Document has Grade – Yes or No
Required By	📅 (If not applicable then leave blank)	

Add Required by Date if applicable ↗

Choose the supplier contact you would like to request document from

Supplier	Via	User
Acorn Produce	---	User 1 Abattoir 3 (Technical Conta ⌄
Abattoir 1	---	User 1 Abattoir (Technical Contac ⌄

Request

OR

5. Search for the required supplier and select '**view**'

Request By	Associated Site	Lead Technical	Supplier Type	Supplier Status	Status	
Democo (Group) ⌄	All ⌄	All ⌄	All ⌄	All ⌄	All ⌄	Filter
Mandatory	**Expired**	**Accreditation Request**	**Factory Doc Request**			Clear Filters
All ⌄	All ⌄	All ⌄	All ⌄			

Total Requested	Total Uploaded	Total Outstanding	Total Marked Not Applicable	Total Expired	Suppliers Compliant	Suppliers Non-Compliant
56	78.57 %	12.5 %	0 %	8.93 %	83 (89.25 %)	10 (10.75 %)

⟳ Multi Request   ⊕ Export To PDF   Q Search...   Go
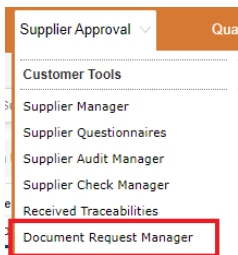
☐	Supplier Name		Requested	Uploaded In Date	Uploaded Expired	Uploaded Info Requested	Outstanding	Supplier Marked N/A	Manual Docs Uploaded/Expired	Compliance Status
☐	Abattoir 1 (US 323232)	View	3	2	0	0	1	0	1 / 1	✖
☐	Abattoir 2 - Abattoir 2 site 1 (Foods Connected)	View	0	0	0	0	0	0	0	▬

6. You can view current added document requests and add new requests by selecting '**Add Document'** and **'Add Required Document'.**

*N.B. You can manually upload a document on behalf of a supplier by selecting **'Add Manual Document'***

Document Request Manager - Supplier Document Search   ← Back

Supplier	Foods Connected	
Site	Democo (Group) ⌄	
Mandatory	-- Select -- ⌄	

⊕ Add Document ▾   🗑 Delete Selected

Add Required Document

Required Documents	Manual Documents						
☐ Document Type	Requested By	Requested From	Start Date	Expiry Date			

Add Manual Document

You have no requested required documents matching the selected options...

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7. Complete fields as mentioned above
   - Category
   - Document Type
   - Comments
   - Manatory (Select 'Yes' if the document is required for compliance)
   - Expiry Date (Select 'Yes' to enable supplier to get reminders when the uploaded document needs renewed)
   - Must have Document Grade
   - Certificate Number Required
   - Document File Required
   - Required By
   - Request From (Please select your company if providing information on the behalf of the supplier)
   - Request From User (Please select the relevant individual to be notified)

*If requesting from a supplier, they must first be setup on Foods Connected with assoicated users.

8. The document request will now be added and this process can be repeated for the required documents

Document Request Manager - Supplier Document Search   ← Back

Supplier	Foods Connected
Site	Democo (Group)
Mandatory	-- Select --

Required Documents | Manual Documents   ➕ Add Document ▾   🗑 Delete Selected

☐	Document Type	Requested By	Requested From	Start Date	Expiry Date	Mandatory	Status	Docs
☐	GFSI Recognised Scheme (BRC, FSSC, IFS, SQF etc.)	Steve Jones	User 1 Abattoir 2			Yes	✖	↪

3.2.2.   UPLOADING DOCUMENTATION

When current Documentation on the system expires, new expiry dates/ certificate numbers need to be added.

1. Select '**Supplier Approval'** and select '**Document Request Manager'** from dropdown options or access through the task list on the home page.

2. Select '**Received Document Requests'**. This will show all documents request which have been assigned. The filters and search funtion will help navigate this list.

Document Request Manager

☰ Company Document   ➜ Sent Document Requests   ☰ Document Summary   ↻ Received Document Requests

3. Select the filters to help assemble a list of documents expired or not uploaded for suppliers. You can use the 'document type' filter to select certain documents, Status filter and 'Country' filter.

If you want to pull a list of any documents that are not up to date and therefore affecting compliancy, select filter **"Mandatory = Yes"** and **"Status = Info Requested, Pending, Expired and Outstanding"**

Once the documents have loaded after selecting filter. Select the 'all button' and the 'click to select all'. This is the top tick box beside 'customer' column on the table. Then select export selected to excel.

Once the Excel file exports, complete the blank columns, or update expired dates. All cells in red are mandatory.

Document Name: The name you want to call the document information you are uploading.
Document Owner: The person who wants to be alerted when the Document is expiring.
Document Grade
Start Date: The start date for the document.
Expiry Date: The expiry date for the document
Certificate Number: The certificate number of the document.

Site Name	Country	Category	Document Type	Document Name	Document Owner	Document Grade	Start Date	Expiry Date	Certificate Number
Democo (Group)	United Kingdom	Accreditations & Memberships	GFSI Recognised Scheme (BRC, FSSC, IFS, SQF etc.)		Ruth McBride	BRC - AA/AA+	12/05/2022		

*Once the excel sheet has been exported there is **no time limit to import** the excel sheet and the full excel sheet <u>does not</u> need to be completed before importing. This means you can upload the documents when you have the information available.*

4. Save the Excel document and then select '**Import Documents from Excel**' button.

5. A modal will pop up prompting you to choose the file you want to upload. Select the save excel sheet and press the '**Import Documents**' button.

*The compliancy status will **update every night**. However, if you need a supplier status to update immediately: Go to Supplier Manager- Supplier list and select 'view' beside the supplier in question and under the compliancy tab select refresh compliancy.

If you import documents individually or incorrectly the compliancy status of the document will be 'Pending'with a grey tick. See example below. To correct this issue, export the documents to excel again and ensure all the mandatory columns have been completed and re-import.

3.2.3.   RESPONDING TO A RECEIVED DOUCMENT REQUEST

Step 1 Go to **Received Documents Requests** or **click on the task link**

Step 2 Find your request and click the blue plus

NB. Document requests can be filtered by supplier type, sub type, business activity and sub business activity. These options will be available when the Customer filter is applied for a single customer.

Document Request Manager

Select Document - GFSI Recognised Scheme (BRC, FSSC, IFS, SQF etc.)

Step 3 Select your document and Save. The document status will turn **Grey** and tell you the file was successfully uploaded.

Repeat these steps for each of the documents which have been requested.

3.2.4 APPROVING A DOCUMENT

When suppliers respond to document requests, the requestor will receive an email, and a notification in their Foods Connected Task bar to say that the document has been received.

When they click on this, they will then have the option to approve the upload or request more information.

Step 1: Click on the dropdown arrow to be able to view the document, and then click on the little file icon to download it

Step 2: Using the menu beside the document, either approve the document or you can request more info from the supplier:

You can also update the requested by, and view history of more info requests, along with supplier responses.

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3.2.5 DOCUMENT SUMMARY

The Document Summary tab allows you to filter the documents by status, supplier type, supplier name, expiry status, type of accreditation request and other useful fields to narrow down the list.

With any given set of filters, it will show the number of documents that have been requested and the percentage of these that have been uploaded and expired. It will also reference the percentage of suppliers who have compliancy linked to document requests that are non-compliant or compliant.

The compliancy status will show red, amber, or green based on the compliancy status of any given supplier. For example, if a rule is set to say that a supplier must upload a BRC document to be compliant, the status will show green if a up to date BRC document is uploaded, while remain red if this is expired or not uploaded.

Amber with a tick = this is ready for your review to either approve or request information

Amber with a hyphen = nothing has been requested yet

Red with an 'x' = supplier is non-compliant as they either have not uploaded a document or it has expired

Green with a tick = compliant supplier

4 LINKING DOCUMENTS TO A PRODUCT

4.2 LINKING A PRODUCT TO A DOCUMENT – SUPPLIER VIEW

In doc request manager admin section there is an option to 'Enable Document Product Links'

When this is set to yes – there will then be two drop down options available in document summary section.

If this option is not enabled there will be no drop-down option in the document summary section, it will default to supplier view when selected.

If the linked product option is toggled on new features will appear when adding a required document or adding a manual document.

Navigate to document summary > select supplier view to add a new document > select the supplier (s) which the documents are associated with > select multi request.

When multi request is selected, a new modal will open enabling the user to select the document and enter the associated information asper current process. In this window there is a new addition 'Link Products?'. This will be toggled to No by default. If the user would like to link the document to a particular product (s) change the toggle to yes.

A new option will appear allowing the user to select all the products which they would link to link to that particular document. A search bar has also been included.

The products which appear in this list are based on the items stored in the 'company product file' Any products which have been selected will appear on the top of the search for clear visibility.

Once all the required products have been selected request the document from the supplier as normal.

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One the request has been made the status will be as below:

Document Status: Red & 'Not Uploaded'
Product Status: Amber & 'Pending Confirmation'

☐	FDA		Claire McCrory	Joe George			Yes	✖	⌄ (3)

4.3   SUPPLIER END – RESONDING TO A REQUEST

When the supplier receives the request for a document – in received document requests/task list, they will also have visibility of the linked products which the customer has stated are associated with the required document.

By using the expand collapse option as highlighted below will display the products which will be linked to the document.

	Customer	Path Point 1	Site	Document Type	Requested By	Requested From	Comment	Mandatory	Required	Status	Docs	Products		
☐	Foods Connected Ltd (Group)		Demo Company 1 Group	*Accreditations & Memberships - FDA	Claire McCrory	Joe George 07/02/2023	requested by claire	Yes		✖		⌃	➕	☰

Linked Product Details	Product Status	Approval Date
10010 - Burger Mince	–	
10012 - Beef Topside	–	
10013 - Beef Rump	–	

 The supplier will then have the ability to attached a document (as per the current process) and they will then also have the ability to 'Confirm the linked products'.

When confirming the linked products, a new modal will open enabling the supplier to select some or all of the products, add a comment and submit this back to the customer.

A product activity tab will also be available.

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If all linked products are checked and submitted the status will update to green. Any products not selected will update to red and the status will read changes requested. An approval date will then also be listed adjacent to the product.

Customer View – Following Supplier Confirmation/Amends

If the products are confirmed by the supplier, the colour will be green and no further action will be required.

If the supplier has not confirm all products the colour will be red. The company user must then select the manage products icon:

Any product that the supplier has not confirmed will automatically be deselected – meaning the company user does not have to find the product to deselect it.

If the company user is in agreement with the suppliers amends they can then select submit.

Alternatively, they can add additional products and submit back to the supplier for confirmation as per the above process.

The product count will update, and the status will be green & confirmed.

4.4   DOCUMENT SUMMARY – PRODUCT VIEW

When this option is selected it will display each of the products which have a linked document.

Clicking on the request option will expand to show how many documents are linked to that product.

It will detail the supplier, document name, the status and will also offer the user the ability to view the linked document.

The colour will amend to amber if the linked products have been amended and are going through confirmation between the customer and supplier. The status will be red if changes have been requested to the chosen linked products.

4.5   LINKED PRODUCT ADDITIONS & AMENDS TO ALREADY UPLOADED DOCUMENTS

When the linked product option is enabled in the admin section there are additional columns displayed in the 'Document Summary > Supplier View > Select Supplier'.

1. Products

2. Manage Products

The manage products option will give users the ability to add additional products to link to the document or remove currently linked products.

If changes are made these will be submitted to the supplier for confirmation

The colour will move from green (currently approved linked documents) to amber and the status will state 'pending confirmation'.

4.5.1 SUPPLIER CONFIRMATION TO A LINKED DOCUMENT MODIFICATION

If a company user then wishes to add or remove a product the supplier will be informed of the change.

The user at the supplier end will receive an email and an item in their task informing them a modification has been made to the linked product associated with the document they had uploaded.

When the supplier follows the task link there will be redirected to 'received document requests'.

In this view the colour will have also changed to amber the status will read awaiting confirmation. Upon expanding the product view, it will display the current linked products.

Using the edit option they can select 'confirm linked products'

4.5.2 USER FINALISATION TO LINKED PRODUCT AMENDS

At this point the system will send an email and generate a task informing the user who made the amends to linked products that the supplier has confirmed the linked products on the associated document request.

When the user clicks on the URL/ task, the colour will have updates to green and the status will be 'confirmed'.

☐	FDA		Claire McCrory	Joe George			Yes	✔	⌄ (1)	⌄ (4)	✎	☰

If any changes are made at this stage, the process will go through the confirmation steps as detailed above.

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