

# TOOL USER GUIDE

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## DOCUMENT REQUEST MANAGER

VERSION 1.6



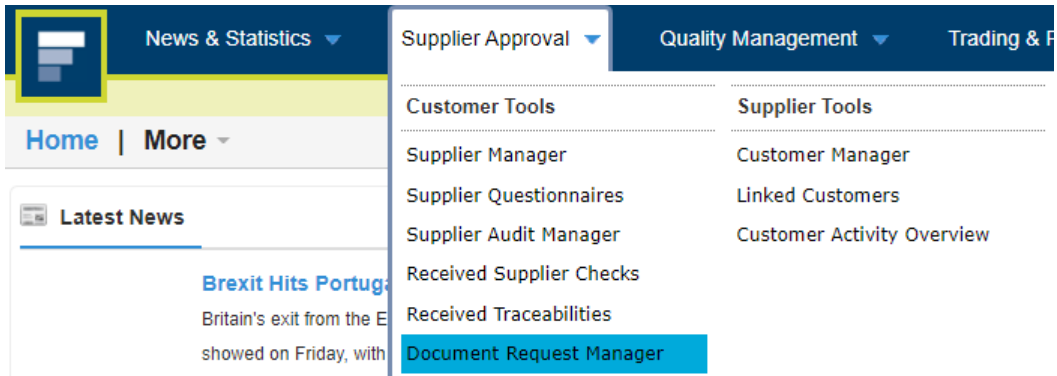
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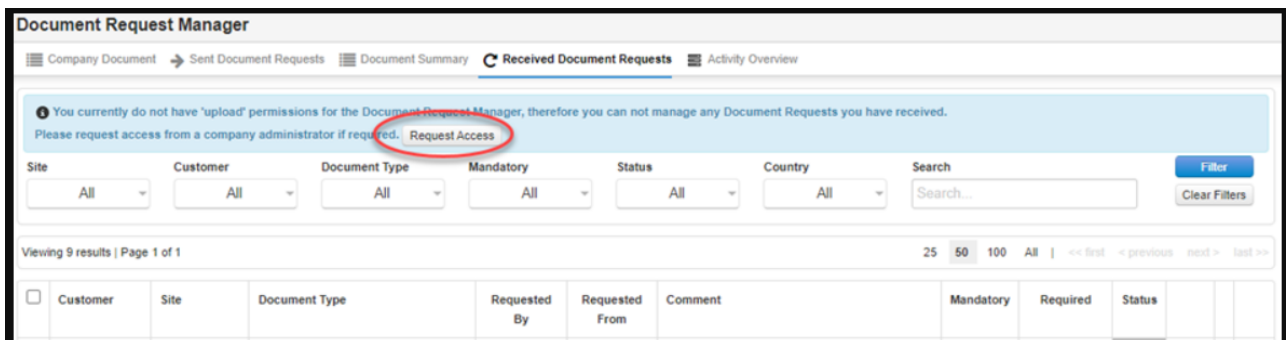
## 1. INITIAL SETUP OF SUPPLIER DOCUMENT MANAGER

### 1.1 INITIAL SET UP

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

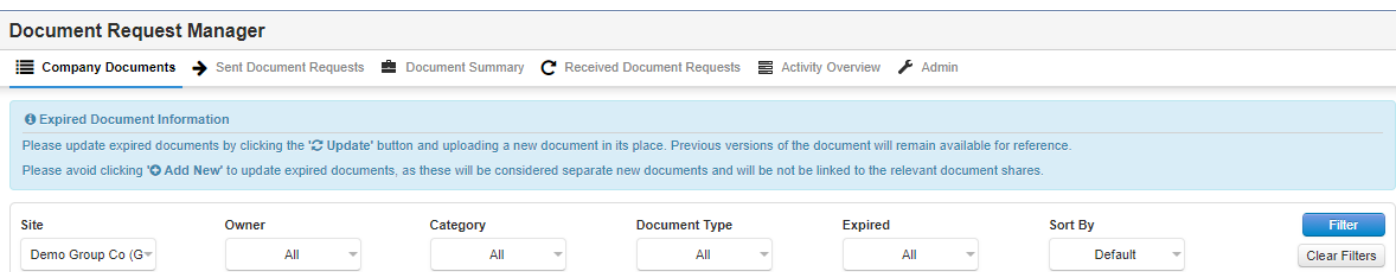


Should you not have the correct access to this module, access can be requested by click on Request Access as per below. This will send an email to your company admin to action.



**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

- This is where each of your internal company documents should be uploaded.
- Once the documents have been uploaded, these can be shared with your customers.

## 2. Sent Document Requests Sent Document Requests

- This is a summary of all the documents which has been requested from you to other users or suppliers.

## 3. Document Summary Document Summary

- 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

- When a customer requests a new document from you, it will appear here for you to upload.

## 5. Activity Overview Activity Overview

- This is a summary of all the activities which have been carryout within this tool.

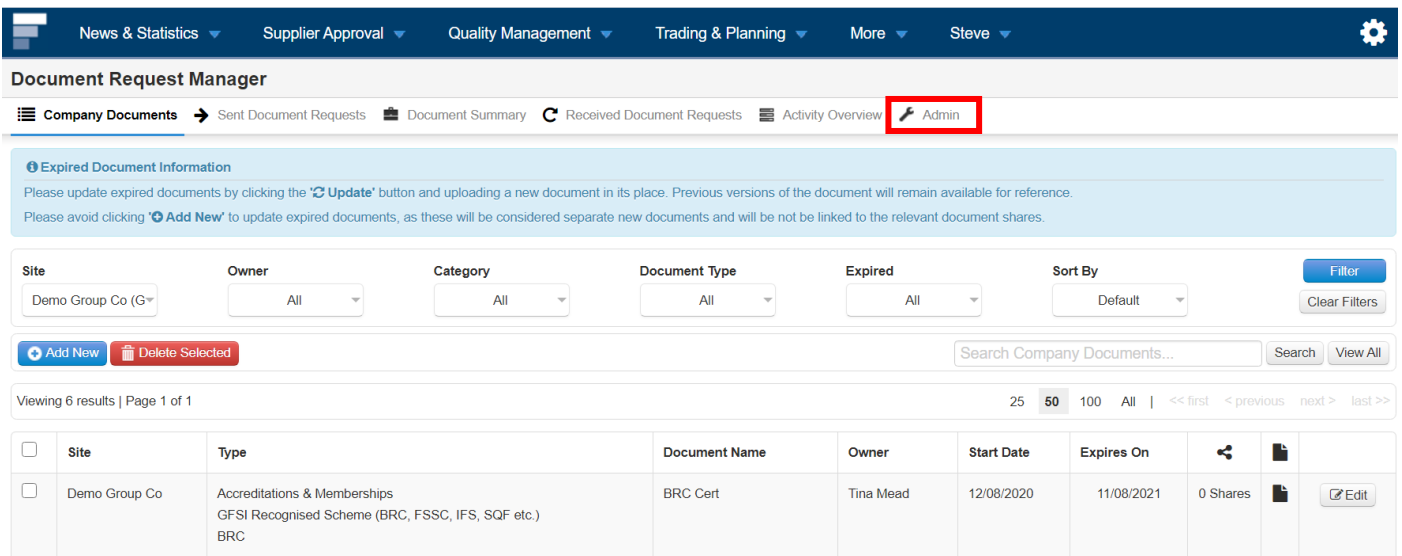
## 6. Admin Admin

- 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**



The screenshot shows the 'Document Request Manager' interface. At the top, there is a navigation bar with tabs: News & Statistics, Supplier Approval, Quality Management, Trading & Planning, More, and Steve. Below this, the 'Document Request Manager' header is visible. A sub-navigation bar contains several options: Company Documents, Sent Document Requests, Document Summary, Received Document Requests, Activity Overview, and Admin. The 'Admin' option is highlighted with a red box. Below the navigation bar, there is a section for 'Expired Document Information' with instructions. Underneath, there are filters for Site, Owner, Category, Document Type, Expired, and Sort By. A 'Filter' button and a 'Clear Filters' button are also present. Below the filters, there are buttons for 'Add New' and 'Delete Selected', and a search bar labeled 'Search Company Documents...'. The main content area shows 'Viewing 6 results | Page 1 of 1'. A table displays the results with columns: Site, Type, Document Name, Owner, Start Date, Expires On, Shares, and an Edit button. The table contains one row for 'Demo Group Co' with details about BRC Certifications.

Site	Owner	Category	Document Type	Expired	Sort By
Demo Group Co (G)	All	All	All	All	Default

Site	Type	Document Name	Owner	Start Date	Expires On	Shares	Edit
Demo Group Co	Accreditations & Memberships GFSI Recognised Scheme (BRC, FSSC, IFS, SQF etc.) BRC	BRC Cert	Tina Mead	12/08/2020	11/08/2021	0 Shares	Edit

**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.

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾

### Document Request Manager

Company Documents → Sent Document Requests Document Summary Received Document Requests Activity Overview **Admin**

Visible Columns

Select which custom columns you would like displayed in addition to the default columns below. **Please Note:** These columns must also be enabled from their source tool.

ⓘ These settings will apply to **Document Summary** (within your company and for third parties) and **Received Document Requests** (when viewed by a third party only)

Column Name	
Test	
Apple Trial	

Save Settings

**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**

Document Request Manager

Company Documents → Sent Document Requests Document Summary Received Document Requests Activity Overview Admin

ⓘ Expired Document Information

Please update expired documents by clicking the "Update" button and uploading a new document in its place. Previous versions of the document will remain available for reference.

Please avoid clicking "Add New" to update expired documents, as these will be considered separate new documents and will not be linked to the relevant document shares.



Site	Owner	Category	Document Type	Expired	Sort By	
Demo Group Co (G	All	All	All	All	Default	Filter
						Clear Filters

Search Company Documents... Search View All

## 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	<input type="text"/>	←	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	<input type="text"/>  (If not applicable then leave blank)	←	Add start date (if applic.)
Expiry Date	<input type="text"/>  (If doesn't expire then leave blank)	←	Add expiry date (if applic.)
Certificate Number	<input type="text"/>	←	Add cert number (if applic.)
Attach Document (Maximum Size: 50MB)	<input type="button" value="Upload File"/> <span>No file selected</span>	←	Upload File
	<input type="button" value="Save"/> <input type="button" value="Cancel"/>	←	Once complete click on save

Document file required? ☐ No

## 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.

**Document Request Manager**

Company Documents → Sent Document Requests → Document Summary → Received Document Requests → Activity Overview → Admin

**Expired Document Information**

Please update expired documents by clicking the 'Update' button and uploading a new document in its place. Previous versions of the document will remain available for reference.  
Please avoid clicking 'Add New' to update expired documents, as these will be considered separate new documents and will not be linked to the relevant document shares.

Site: Demo Group Co (G) Owner: All Category: All Document Type: All Expired: All Sort By: Default Filter Clear Filters

+ Add New Delete Selected Search Company Documents... Search View All

Viewing 9 results | Page 1 of 1 25 50 100 All | << first < previous next > last >>

<input type="checkbox"/>	Site	Type	Document Name	Owner	Start Date	Expires On			
<input type="checkbox"/>	Demo Group Co	Accreditations & Memberships GFSI Recognised Scheme (BRC, FSSC, IFS, SQF etc.) BRC	BRC Cert	Tina Mead	12/08/2020	11/08/2021	0 Shares		
<input type="checkbox"/>	Demo Group Co	Accreditations & Memberships Red Tractor Assurance Certificate	Red Tractor Cert	Steve Jones	07/01/2020	06/01/2021	0 Shares		

**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.

**Document Request Manager - Update Expired Document** ← Back

Company Documents → Sent Document Requests → Document Summary → Received Document Requests → Activity Overview → Admin

**This Document has Expired**  
Please adjust the expiry date and upload a new document by clicking the 'Update Expired Document' button below. Previous versions of the document will remain available for reference.

Associated Site: Demo Group Co (Group)

Document Name: Red Tractor Cert

Document Owner: Steve Jones

Category: Accreditations & Memberships

Document Type: Red Tractor Assurance Certificate

Document Grade: -- N/A --

Start Date: 07/01/2020 (If not applicable then leave blank)

Expiry Date: 06/01/2021 (If document expires then leave blank)

Certificate Number:

Attach Document (Maximum Size: 50MB)  
If you would like to override the current document, please select a new file, then click the 'Save' button.

Document Document: Red Tractor Cert.pdf  
file selected... Document file required? No

**Update Expired Document** Save Cancel

**Previous Versions**

Filename	Start Date	Expiry Date	Document Name	Certificate Number
Red tractor cert.png	01/11/2018	01/11/2019	---	---
Red tractor.pdf	01/01/2019	01/01/2020	---	---

## 2.3 EDITING A COMPANY DOCUMENT

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

**Document Request Manager**


Company Documents → Sent Document Requests → Document Summary → Received Document Requests → Activity Overview → Admin

**Expired Document Information**  
Please update expired documents by clicking the 'Update' button and uploading a new document in its place. Previous versions of the document will remain available for reference.  
Please avoid clicking 'Add New' to update expired documents, as these will be considered separate new documents and will not be linked to the relevant document shares.

Site: Demo Group Co (G) Owner: All Category: All Document Type: All Expired: All Sort By: Default Filter Clear Filters

+ Add New Delete Selected Search Company Documents... Search View All

Viewing 9 results | Page 1 of 1 25 50 100 All | << first < previous next > last >>

<input type="checkbox"/>	Site	Type	Document Name	Owner	Start Date	Expires On	Shares	Actions
<input type="checkbox"/>	Demo Group Co	Accreditations & Memberships GFSI Recognised Scheme (BRC, FSSC, IFS, SQF etc.) BRC	BRC Cert	Tina Mead	12/08/2020	11/08/2021	0 Shares	 <b>Edit</b>

**Step 2:** Once you have updated the details Select 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)

Document Name: Anti slavery Policy

Document Owner: Steve Jones

Category: Factory Document

Document Type: Anti Slavery Policy

Document Grade: -- N/A --

Start Date: 01/12/2020 (if not applicable then leave blank)

Expiry Date: 01/12/2021 (if doesn't expire then leave blank)

Certificate Number: 12345

Attach Document (Maximum Size: 50MB)  
If you would like to override the current document, please select a new file, then click the 'Save' button

Current Document: Anti slavery policy doc\_2.pdf

Upload File No file selected...

Document file required? No

**Save** Cancel

### Previous Versions

Filename	Start Date	Expiry Date	Document Name	Certificate Number	
Anti slavery policy doc.pdf	01/11/2018	01/11/2019	---	---	
Anti slavery policy doc_unbranded.pdf	01/11/2018	01/11/2019	---	---	
Anti slavery policy doc_1.pdf	02/12/2019	01/12/2020	Anti slavery Policy	---	



## 2.4 DELETING A COMPANY DOCUMENT

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

**Document Request Manager**

Company Documents → Sent Document Requests Document Summary Received Document Requests Activity Overview Admin

**Expired Document Information**  
Please update expired documents by clicking the 'Update' button and uploading a new document in its place. Previous versions of the document will remain available for reference.  
Please avoid clicking 'Add New' to update expired documents, as these will be considered separate new documents and will not be linked to the relevant document shares.

Site: Demo Group Co (G) Owner: All Category: All Document Type: All Expired: All Sort By: Default Filter Clear Filters

Add New Delete Selected Search Company Documents... Search View All

Viewing 9 results | Page 1 of 1 25 50 100 All | << first < previous next > last >>

<input type="checkbox"/>	Site	Type	Document Name	Owner	Start Date	Expires On			
<input type="checkbox"/>	Demo Group Co	Accreditations & Memberships GFSI Recognised Scheme (BRC, FSSC, IFS, SQF etc.) BRC	BRC Cert	Tina Mead	12/08/2020	11/08/2021	0 Shares		Edit
<input type="checkbox"/>	Demo Group Co	Accreditations & Memberships Red Tractor Assurance Certificate	Red Tractor Cert	Steve Jones	07/01/2020	06/01/2021	0 Shares		Update

## 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**

**Document Request Manager**

Company Documents → Sent Document Requests **Document Summary** Received Document Requests Activity Overview Admin

2) Choose the relevant suppliers.

<input type="checkbox"/>	Supplier Name		Requested	Uploaded In Date	Uploaded Expired	Uploaded Info Requested	Outstanding	Supplier Marked N/A	Manual Docs Uploaded/Expired	Compliance Status
<input type="checkbox"/>	Abattoir 1 (EC 323232)	<a href="#">View</a>	4	4	0	0	0	0	1 / 0	
<input type="checkbox"/>	Acorn Produce (EC 343434)	<a href="#">View</a>	3	0	2	0	1	0	0	

3) Select **Multi Request**

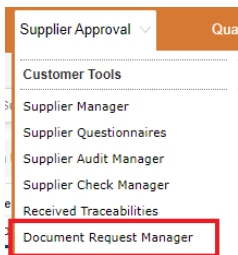
<input checked="" type="checkbox"/> Multi Request	<input type="checkbox"/> Export To PDF									
<input type="checkbox"/>	Supplier Name		Requested	Uploaded In Date	Uploaded Expired	Uploaded Info Requested	Outstanding	Supplier Marked N/A	Manual Docs Uploaded/Expired	Compliance Status
<input type="checkbox"/>	Abattoir 1 (EC 323232)	<a href="#">View</a>	4	4	0	0	0	0	1 / 0	

#### 4) Complete the requested info

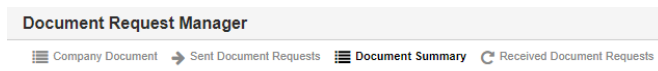
### 3.2 REQUESTING A DOCUMENT AND RESPONDING TO A DOCUMENT REQUEST

#### 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

**Document Request Manager**

Company Document → Sent Document Requests → **Document Summary** → Received Document Requests → Activity Overview → Admin

Request By: Democo (Group) | Associated Site: All | Lead Technical: All | Supplier Type: All | Supplier Status: All | Status: All | Filter | Clear Filters

Mandatory: All | Expired: All | Accreditation Request: All | Factory Doc Request: 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 | 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) <a href="#">View</a>	3	2	0	0	1	0	1 / 1	<span style="background-color: red; color: white;">✗</span>

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

## Document Request Manager - Multi Request

Company Documents → Sent Document Requests → **Document Summary** → Received Document Requests → Activity Overview → Admin

Site: Multiple Sites (Group)

Category: Accreditations & Memberships ← Choose Category

Document Type: Aberdeen Angus Scheme ← Choose Document Type

Comments:  ← 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:  ← Add Required by Date if applicable (If not applicable then leave blank) ← Choose the supplier contact you would like to request document from

Supplier	Via	User
Acom Produce	---	User 1 Abattoir 3 (Technical Cont...
Abattoir 1	---	User 1 Abattoir (Technical Contac...

**Request**

OR

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

Request By: Democo (Group) | Associated Site: All | Lead Technical: All | Supplier Type: All | Supplier Status: All | Status: All Filter Clear Filters

Mandatory: All | Expired: All | Accreditation Request: All | Factory Doc Request: 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 Search... Go

<input type="checkbox"/>	Supplier Name	Requested	Uploaded In Date	Uploaded Expired	Uploaded Info Requested	Outstanding	Supplier Marked N/A	Manual Docs Uploaded/Expired	Compliance Status
<input type="checkbox"/>	Abattoir 1 (US 323232)	3	2	0	0	1	0	1 / 1	<span>✗</span>
<input type="checkbox"/>	Abattoir 2 - Abattoir 2 site 1 (Foods Connected)	0	0	0	0	0	0	0	<span>—</span>

## 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 --

Required Documents Manual Documents

+ Add Document + Add Required Document + Add Manual Document ✗ Delete Selected

<input type="checkbox"/>	Document Type	Requested By	Requested From	Start Date	Expiry Date	M...
You have no requested required documents matching the selected options...						

## 7. Complete fields as mentioned above

- Category
- Document Type
- Comments
- Mandatory (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 associated 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:

Mandatory:

<input type="checkbox"/>	Document Type	Requested By	Requested From	Start Date	Expiry Date	Mandatory	Status	Docs
<input type="checkbox"/>	GFSI Recognised Scheme (BRC, FSSC, IFS, SQF etc.)	Steve Jones	User 1 Abattoir 2			<input type="button" value="Yes"/>	<input type="button" value="X"/>	<input type="button" value="G"/>

### 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 function will help navigate this list.

**Document Request Manager**

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”**

Site: All Customer: All Document Type: All Mandatory: Yes Status: 4 selected Country: All Search: Search...

In Country PMO: All

Viewing 568 results | Page 1 of 12

Export Selected to Excel

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.

#### Document Request Manager

Company Document Sent Document Requests Document Summary **Received Document Requests** Activity Overview Admin

Site: All Customer: All Document Type: All Mandatory: All Status: Info Requested Country: All Search: Search... Filter Clear Filters

Exact Phrase Only

Viewing 1 results | Page 1 of 1 25 50 100 All << first < previous next > last >>

Export Selected to Excel Import Documents From Excel

<input type="checkbox"/>	Customer	Site	Document Type	Requested By	Requested From	Comment	Mandatory	Required	Status	Docs	
<input type="checkbox"/>	Abattoir 1 (Group)	Democo Group	Accreditations & Memberships - GFSI Recognised Scheme (BRC, FSSC, IFS, SQF etc.)	User 1 Abattoir	Paul Armstrong 17/05/2023		Yes	19/05/2023 00:00:00	✖	▼	+

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 **does not** 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.

**Document Request Manager**

Company Document → Sent Document Requests → Document Summary → **Received Document Requests** → Activity Overview → Admin

Site: All Customer: All Document Type: All Mandatory: All Status: Info Requested Country: All Search:  Filter Clear Filters

☐ Exact Phrase Only

Viewing 1 results | Page 1 of 1 25 50 100 All | << first < previous next > last >>

[Export Selected to Excel](#) [Import Documents From Excel](#)

<input type="checkbox"/>	Customer	Site	Document Type	Requested By	Requested From	Comment	Mandatory	Required	Status	Docs		
<input type="checkbox"/>	Abattoir 1 (Group)	Democo Group	Accreditations & Memberships - GFSI Recognised Scheme (BRC, FSSC, IFS, SQF etc.)	User 1 Abattoir	Paul Armstrong 17/05/2023		Yes	19/05/2023 00:00:00	✗	▼	+	☰

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.

**Foods Connected Ltd** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location **Compliance** Contacts Notes Accessible Data Data Forms Supply Chain Map

Associated Site:

[Refresh Compliance](#)

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.

Import Documents From Excel						
nt	Mandatory	Required	Status			
	Yes		✓	▼	+	☰

### 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

Company Documents → Sent Document Requests → Document Summary → **Received Document Requests** → Activity Overview → Admin

Site: All | Customer: Foods Connected | Document Type: All | Mandatory: All | Status: All | Country: All | Search: Search...   
 Supplier Type: All | Supplier Sub Type: All | Business Activity: All | Business Sub Activity: All

Filter | Clear Filters

Export Selected to Excel

Import Documents From Excel

<input type="checkbox"/>	Customer	Site	Document Type	Requested By	Requested From	Comment	Mandatory	Required	Status		
<input type="checkbox"/>	Demo Company 1 (Group)	Foods Connected Ltd Group	Accreditations & Memberships - GFSI Recognised Scheme (BRC, FSSC, IFS, SQF etc.) - BRC	N/A	N/A 20/02/2018		Yes		✗	+	
<input type="checkbox"/>	Demo Company 1 (Group)	Foods Connected Ltd Group	Accreditations & Memberships - GFSI Recognised Scheme (BRC, FSSC, IFS, SQF etc.) - BRC	N/A	N/A 20/02/2018		Yes		✗	+	
<input type="checkbox"/>	Demo Company 1 (Group)	Foods Connected Ltd Group	Accreditations & Memberships - GFSI Recognised Scheme (BRC, FSSC, IFS, SQF etc.) - BRC	N/A	N/A 20/02/2018		Yes		✗	+	

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

Upload New Document

<input type="checkbox"/>	Site	Document Name	Document Owner	Expiry Date
<input type="checkbox"/>		ISO22000		10/06/2023
<input type="checkbox"/>		IFS FOOD certificate		04/06/2021

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

## Document Request Manager

Company Documents → **Received Document Requests**

File successfully updated

Site: Foods Connected | Customer: All | Document Type: All | Mandatory: All | Status: All | Country: All | Search: Search...   
 Filter | Clear Filters

Viewing 3 results | Page 1 of 1

25 50 100 All | &lt;&lt; first &lt; previous next &gt; last &gt;&gt;

Export Selected to Excel

Import Documents From Excel

<input type="checkbox"/>	Customer	Site	Document Type	Requested By	Requested From	Comment	Mandatory	Required	Status		
<input type="checkbox"/>	Demo Group Co (Group)	Bakery Supplier (Group)	Accreditations & Memberships - GFSI Recognised Scheme (BRC, FSSC, IFS, SQF etc.) - BRC	Steve Jones	John Downey 16/11/2018		Yes	21/12/2018 00:00:00	✓	▼	+
<input type="checkbox"/>	Demo Group Co (Group)	Bakery Supplier (Group)	Factory Document - Hygiene Control Procedure	Steve Jones	John Downey 03/12/2018		Yes	31/12/2018 00:00:00	✗	▼	+
<input type="checkbox"/>	Demo Group Co (Group)	Bakery Supplier (Group)	Factory Document - Allergen Control Procedure	Steve Jones	John Downey 03/12/2018		Yes	31/12/2018 00:00:00	✓	▼	+

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

**Document Request Manager - Supplier Document Search** ← Back

Supplier: Ingredients Supplier

Site: Democo (Group) ▼

Mandatory: -- Select -- ▼

Required Documents Manual Documents Add Document ▼ Delete Selected

<input type="checkbox"/>	Document Type	Requested By	Requested From	Start Date	Expiry Date	Mandatory	Status	Docs
<input type="checkbox"/>	BRC	Steve Jones	Elaine Rogers	01/01/2023	01/01/2025	Yes <input type="checkbox"/>	✓	▼ (1)
<input type="checkbox"/>	Organic Certified	Bethany McDowell	Elaine Rogers		23/01/2025	Yes <input type="checkbox"/>	✓	▲ (1)

<input type="checkbox"/>	Document Name	Cert No.	Uploaded By	Grade	Start Date	End Date	Previous Versions
	Organic Certified		Elaine Rogers	N/A		23/01/2025	

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

**Document Request Manager - Supplier Document Search** ← Back

Supplier: Ingredients Supplier

Site: Democo (Group) ▼

Mandatory: -- Select -- ▼

Required Documents Manual Documents Add Document ▼ Delete Selected

<input type="checkbox"/>	Document Type	Requested By	Requested From	Start Date	Expiry Date	Mandatory	Status	Docs
<input type="checkbox"/>	BRC	Steve Jones	Elaine Rogers	01/01/2023	01/01/2025	Yes <input type="checkbox"/>	✓	▼ (1)
<input type="checkbox"/>	Organic Certified	Bethany McDowell	Elaine Rogers		23/01/2025	Yes <input type="checkbox"/>	✓	▲ (1)

<input type="checkbox"/>	Document Name	Cert No.	Uploaded By	Grade	Start Date	End Date	Previous Versions
	Organic Certified		Elaine Rogers	N/A		23/01/2025	<div> Approve  Request Info  Hide  Update Requested By  View History </div>

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



### 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.

**Document Request Manager**

Company Document → Sent Document Requests → **Document Summary** → Received Document Requests → Activity Overview → Admin

Request By: Democo (Group) Associated Site: All Lead Technical: All Supplier Type: All Supplier Status: All Status: All Filter Clear Filters

Mandatory: All Expired: All Accreditation Request: All Factory Doc Request: All

Total Requested	Total Uploaded	Total Outstanding	Total Marked Not Applicable	Total Expired	Suppliers Compliant	Suppliers Non-Compliant
57	77.19 %	14.04 %	0 %	8.77 %	82 (88.17 %)	11 (11.83 %)

Multi Request Export To PDF Search... Go

<input type="checkbox"/>	Supplier Name		Requested	Uploaded In Date	Uploaded Expired	Uploaded Info Requested	Outstanding	Supplier Marked N/A	Manual Docs Uploaded/Expired	Compliance Status
<input type="checkbox"/>	Abattoir 1 (US 323232)	<a href="#">View</a>	3	2	0	0	1	0	1 / 1	✗
<input type="checkbox"/>	Abattoir 2 - Abattoir 2 site 1 (Foods Connected)	<a href="#">View</a>	1	0	0	0	1	0	0	✗
<input type="checkbox"/>	ABC Laboratories (1234)	<a href="#">View</a>	1	1	0	0	0	0	0	✓
<input type="checkbox"/>	ABC Snacks Ltd (NZ 347761)	<a href="#">View</a>	1	1	0	0	0	0	0	✓

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.

The screenshot shows the 'Document Request Manager' Admin interface. A red box highlights the 'Document Request Settings' link in the left sidebar. Another red box highlights the 'Document Summary' dropdown menu, which has 'Supplier View' and 'Product View' options. A third red box highlights the 'Option' field for 'Enable Document Product Links', which is set to 'Yes'. A 'Save Settings' button is visible at the bottom right.

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.

The screenshot shows the 'Document Request Manager' interface. A red box labeled '1' highlights the 'Document Summary' dropdown menu, which has 'Supplier View' and 'Product View' options. Another red box labeled '2' highlights the 'Multi Request' button. A third red box labeled '3' highlights the 'Export To PDF' button. The interface also shows a table with columns for 'Request By', 'Associated Site', 'Supplier Type', 'Supplier Status', 'Status', 'Total Requested', 'Total Uploaded', 'Total Outstanding', 'Total Marked Not Applicable', 'Total Expired', 'Suppliers Compliant', and 'Suppliers Non-Compliant'. The table data is as follows:

Request By	Associated Site	Supplier Type	Supplier Status	Status	Total Requested	Total Uploaded	Total Outstanding	Total Marked Not Applicable	Total Expired	Suppliers Compliant	Suppliers Non-Compliant
Foods Connect	All	All	All	All	23	0 %	60.87 %	0 %	39.13 %	19 (70.37 %)	8 (29.63 %)

When multi request is selected, a new modal will open enabling the user to select the document and enter the associated information as per 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.



Current Linked Products

✕

Confirm Products

Products Activity

Review and confirm linked products for this document request

<input type="checkbox"/>	Product Code	Product Name	Alternative Details
<input checked="" type="checkbox"/>	10010	Burger Mince	
<input checked="" type="checkbox"/>	10012	Beef Topside	
<input type="checkbox"/>	10013	Beef Rump	

Comments

Only 2 approved - 3rd products is n/a for this document.

Cancel

Submit

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.

<input type="checkbox"/>	Foods Connected Ltd (Group)	Demo Company 1 Group	Accreditations & Memberships - FDA	Claire McCrory	Joe George 07/02/2023	requested by claire	Yes	<div><div>✓</div></div>	<div><div>⌵</div></div>	<div><div>⬆</div></div>	<div><div>+</div></div>	<div><div>☰</div></div>
Linked Product Details			Product Status			Approval Date						
10010 - Burger Mince			✓			07/02/2023						
10012 - Beef Topside			✓			07/02/2023						
10013 - Beef Rump			ⓘ									

### 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:

[illegible]

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.

Manage Linked Products

Linked Products Activity

Any modifications made to Linked Products will have to be confirmed by the Supplier

Supplier

Demo Company 1

Request To

Joe George

Products

Currently Selected: 100110 - burger Mince, 100112 - Beef topside

☐ 00 - 00
   
☐ 00005atic - turkey
   
☐ 0012 - New N'd Product
   
☐ 001307-0 - Beef Burgers x2
   
☐ 010203 - BC test Product
   
☐ 025 - test B2
   
☐ 010 - test B2

Cancel

Submit

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.

<input type="checkbox"/>	FDA	Claire McCrory	Joe George			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> (1)	<input checked="" type="checkbox"/> (2)	<input type="checkbox"/>	<input type="checkbox"/>
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#### 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.

Document Request Manager

Company Document
Sent Document Requests
Document Summary
Received Document Requests
Activity Overview
Admin

Request By  
Foods Connect

Product  
All

Product Category  
All

Status  
All

Mandatory  
All

Expired  
All

Path Point 1  
All

Filter

Clear Filters

Total Requested	Total Uploaded	Total Outstanding	Total Marked Not Applicable	Total Expired
1	100 %	0 %	0 %	0 %

Export To PDF
Search...
Go

<input type="checkbox"/>	Product Name	Requested	Uploaded In Date	Uploaded Expired	Uploaded Info Requested	Outstanding	Supplier Marked N/A	Manual Docs Uploaded/Expired
<input type="checkbox"/>	1184 - Liver	<div> <div></div> <div>(1)</div> </div>	1	0	0	0	0	1 / 0

Supplier Name	Document Type	Product Status	Attached Docs
Demo Company 1	View Accreditations & Memberships - Aberdeen Angus Scheme	<div></div>	<div></div>

#### 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

Supplier Demo Company 1										
Site		Foods Connected Ltd (Group) ▼								
Mandatory		-- Select -- ▼								
Required Documents		Manual Documents		<a href="#">Add Document</a> <a href="#">Delete Selected</a>						
<input type="checkbox"/>	Document Type	Requested By	Requested From	Start Date	Expiry Date	Mandatory	Status	Docs	Products	
<input type="checkbox"/>	GFSI Recognised Scheme (BRC, FSSC, IFS, SQF etc.)	Barry Creaney	demo 1	14/12/2020	31/12/2021	<a href="#">Yes</a>	✗	▼ (2)		<a href="#">Manage</a>
<input type="checkbox"/>	Ethical Audits completed by Tesco Recognised Ethical Audit Bodies- 80045 (a)	Barry Creaney	demo 10			<a href="#">Yes</a>	✗			<a href="#">Manage</a>
<input type="checkbox"/>	FDA	Claire McCrory	Joe George			<a href="#">Yes</a>	✓	▼ (1)	▼ (2)	<a href="#">Manage</a>

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'.

<input type="checkbox"/>	FDA	Claire McCrory	Joe George			<a href="#">Yes</a>	✓	▼ (1)	▼ (3)	<a href="#">Manage</a>
--------------------------	-----	----------------	------------	--	--	---------------------	---	-------	-------	------------------------

#### 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.

<input type="checkbox"/>	FDA	Claire McCrory	Joe George			<a href="#">Yes</a>	✓	▼ (1)	▲ (3)	<a href="#">Manage</a>
Linked Product Details		Product Status		Approval Date						
10010 - Burger Mince		✓		07/02/2023						
10012 - Beef Topside		✓		07/02/2023						
00005a1bc - turkey		-								

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

Mandatory	Required	Status		
Yes		✗	▲	<a href="#">+</a>

Mark As Not Applicable  
 Change Requested From  
 Attach Document  
 View History  
 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'.

<input type="checkbox"/>	FDA	Claire McCorry	Joe George			<input type="button" value="Yes"/>	<div>✓</div>	<div>▼ (1)</div>	<div>▼ (4)</div>		
--------------------------	-----	-------------------	------------	--	--	------------------------------------	--------------	------------------	------------------	--	--

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