TOOL USER GUIDE

SPECIFICATION MANAGER





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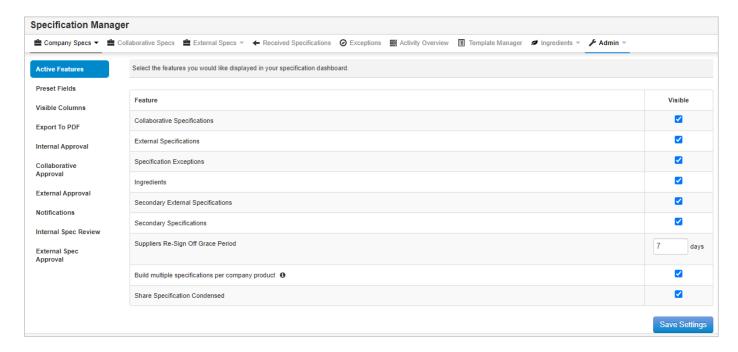


1. INITIAL SETUP FOR SPECIFICATION MANAGER

The company product file needs to be set up before being able to build specifications on the system. Refer to the company product file user guide for setup steps.

1.1. SETTING SPECIFICATION FEATURES AND VISIBLE COLUMNS

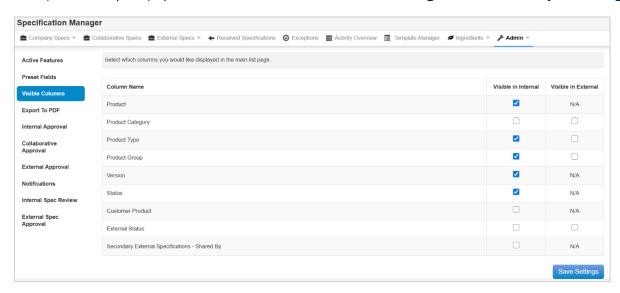
Step 1: Select Quality Management tab and select Specification Manager. Select the Admin tab then select General Admin.



Step 2: The Active Features section allows you to tick the checkboxes for which parts of the tool you will be using so the relevant functions show as tabs across the Specification Manager toolbar. Here you can also set the grace period for suppliers when they are being asked to re-sign off a specification after the set review period. Click on the Save Settings button to save your changes.



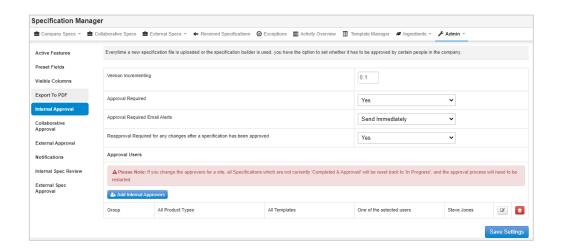
Step 3: The Visible Columns section allows you to tick the checkboxes for the columns you would like to include in the specification list view with different options for the internal (company specs) and external (external specs) specifications. Click on the Save Settings button to save your changes.



1.2. SETTING UP INTERNAL AND COLLABORATIVE REVIEW AND APPROVAL SETTINGS

Step 1: Select **Quality Management** *tab* and select **Specification Manager**. Select **Admin** tab, selecting **General Admin**.

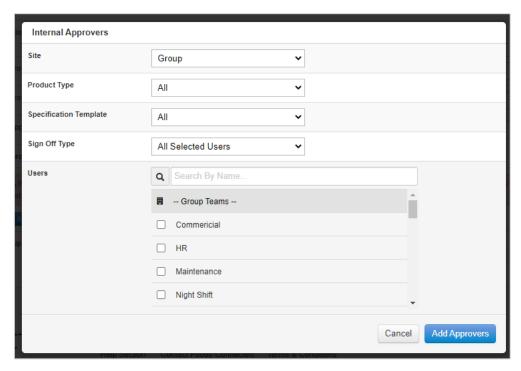
Step 2: The Internal Approval and Collaborative Approval sections allow you to set the version incrementing for new specifications (a specification's version will update when a change is made to an approved specification). You can also select the settings for turning on whether approval is required. Make sure to click on Save Settings at the bottom of the page after selecting your options.





Step 3: If the internal/collaborative approval has been turned on, add on approvers by clicking on the **Add Internal Approvers.** This will open a window with the approver options:

- Site select site for specifications.
- Product type you can set different approvers for different product types or leave as 'All'.
- Specification template you can set different approvers for different specification templates or leave as 'All'.
- Sign off type if you are selecting more than one approver, the *All Selected Users* option will force all the selected users to sign off the specification before becoming approver, or the *One Selected Users* option will update the specification to approved after one user signs off the specification.
- Users select the user(s) who will be asked to sign off specifications that match the selected settings.



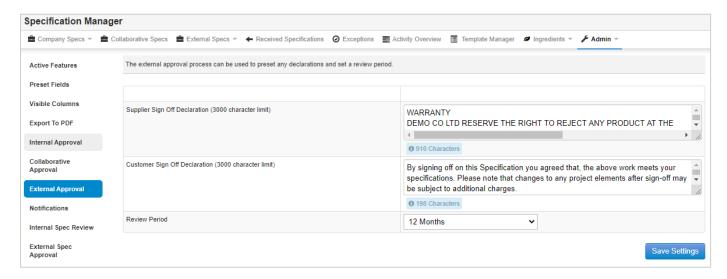
Step 4: To save click on **Add Approvers** and these can be edited or deleted by clicking on the buttons to the right of them.



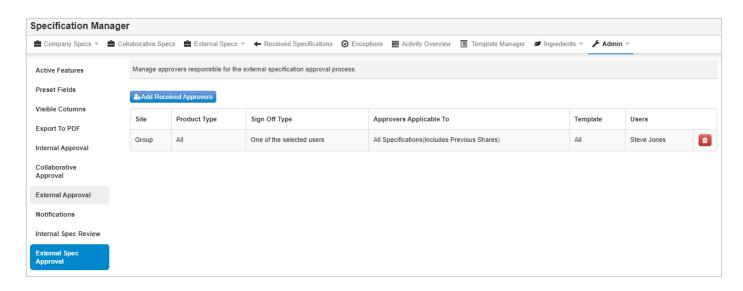
1.3. SETTING UP EXTERNAL APPROVAL SETTINGS

Step 1: Select Quality Management tab and select Specification Manager. Select the Admin tab, selecting *General Admin*.

Step 2: The External Approval section allows you to set the sign off declaration that your customers and suppliers will see when you share a specification with them for sign off. If you make changes, make sure to click on Save Settings.



Step 3: Select **External Spec Approval** to set up approvers for signing off specifications that have been completed by your suppliers.

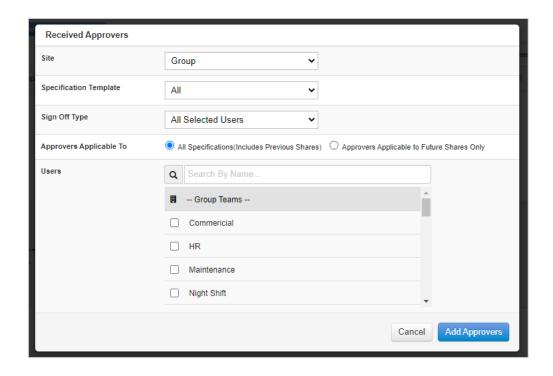




Step 4: Click on **Add Received Approvers** to add new approvers, this will open a window with the approver options:

- Site select site for specifications.
- Specification template you can set different approvers for different specification templates or leave as 'All'.
- Sign off type if you are selecting more than one approver, the *All Selected Users* option will force all the selected users to sign off the specification before becoming approver, or the *One Selected Users* option will update the specification to approved after one user signs off the specification.
- Approvers applicable to select whether you want these approvers to be set for previous and future specifications or only future.
- Users select the user(s) who will be asked to sign off specifications that match the selected settings.

Step 5: To save click on **Add Approvers** and these can be deleted by clicking on the button to the right of them.

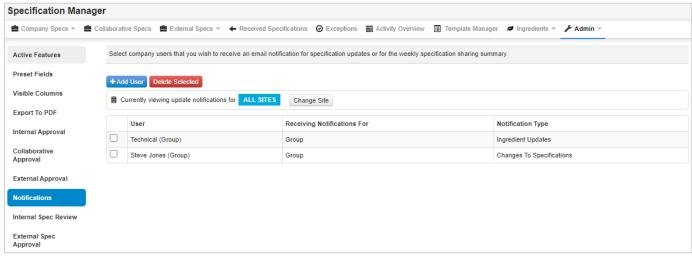




1.4. SETTING UP NOTIFICATIONS

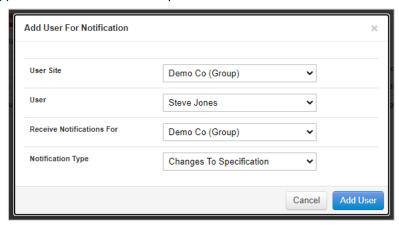
Step 1: Select Quality Management tab and select Specification Manager. Select the Admin tab, selecting General Admin.

Step 2: Select the **Notifications** section to set up email notifications for various actions taken on the system.



Select on Add User to add a new notification and this will open up a window with the options:

- User Site select the user's site to filter to the user dropdown.
- User select the user who will receive the notification.
- Receive Notifications for select the relevant site of the specifications that the notifications will be sent for
- Notification Type select one of the options or all.



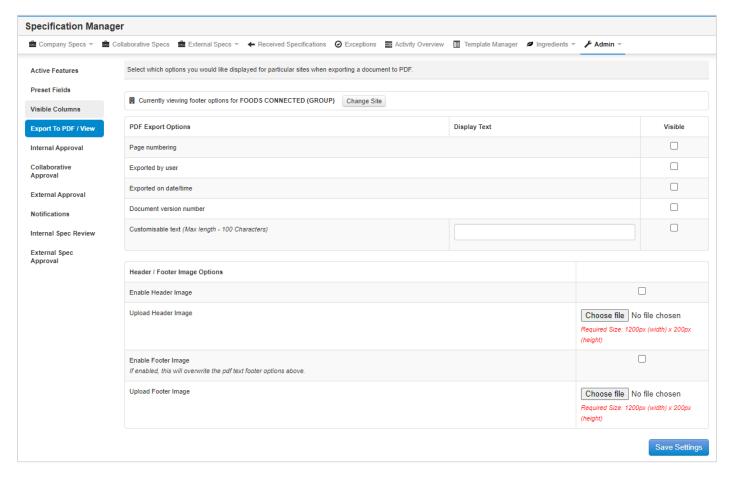
Step 3: To save click on **Add User** and these can be deleted by ticking the checkbox to the left of the notification and clicking on **Delete Selected**.



1.5. SETTING UP EXPORT TO PDF OPTIONS

Step 1: Select **Quality Management** tab and select **Specification Manager**. Select the **Admin** tab, selecting **General Admin**.

Step 2: Select the Export to PDF section to set up PDF options for your specifications.



Step 3: To turn on any of the *PDF Export Options*, tick the relevant checkbox(es) and click on **Save Settings** to save your selection.

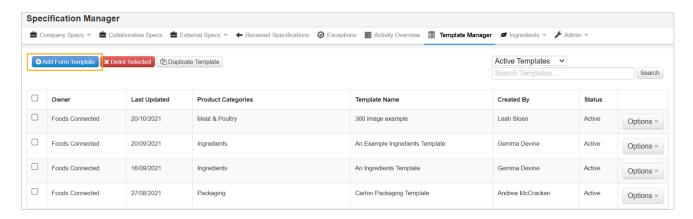
Step 4: To set up a header or footer image, tick the relevant checkbox(es) and click on **Choose File** to upload your header/footer image. Make sure to click on **Save Settings** to save your setup.



2. CREATING SPECIFICATION TEMPLATES

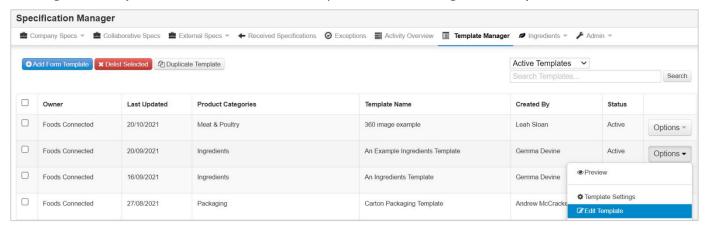
2.1. CREATING A SPECIFICATION TEMPLATE

Step 1: Select Quality Management tab and select Specification Manager. Select the Template Manager tab, selecting Add Form Template to create a new template.



Step 2: Fill in the template name, clicking on **Save Title** to save it. Build the specification template using the form builder functionality.

Step 3: Once the template is complete it can updated by selecting **Template Manager** page by clicking on the **Options** button beside the template and selecting **Edit Template**.



*You can search for specific templates using the search bar on the right-hand side of the page.

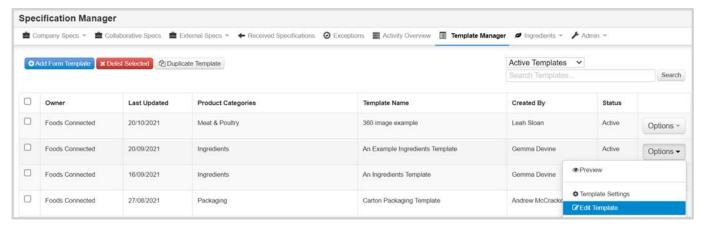




2.2. SETTING SECONDARY SPECIFICATION FIELDS

A template must first be created to select fields which must populate in the secondary specification. When fields are selected any information complete in the primary will populate in the secondary specification.

Step 1: Select Quality Management tab and select Specification Manager. Select the Template

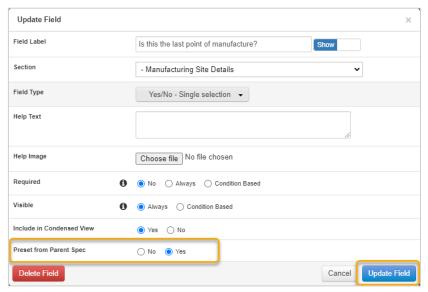


Manager tab, click on the Options button beside the template and selecting Edit Template.

Step 2: Select the **Edit** icon at the field required to populate from the primary specification into the secondary specification



Step 3: Select Yes in the pre-set from parent spec and select Update Field.

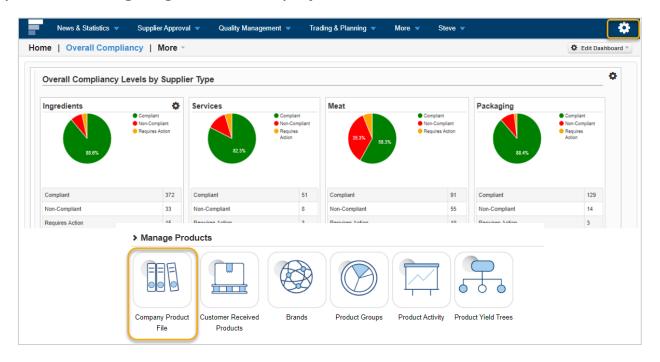




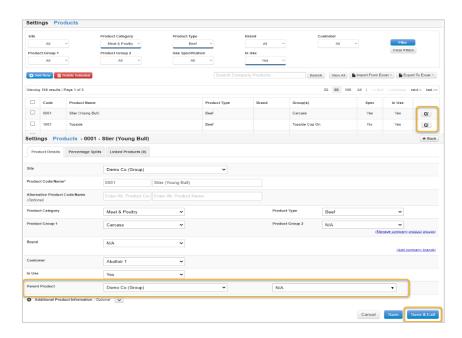
2.3. LINKING SECONDARY EXTERNAL SPECIFICATIONS

To create a secondary external spec the primary specification must be linked to the secondary external specification – this is complete in the product file.

Step 1: Select Settings Cog and select Company Product File.



Step 2: Select the Edit icon at the secondary external specification product. At Parent Product select the site and product which the external specification has been complete against. Select Save & Exit.



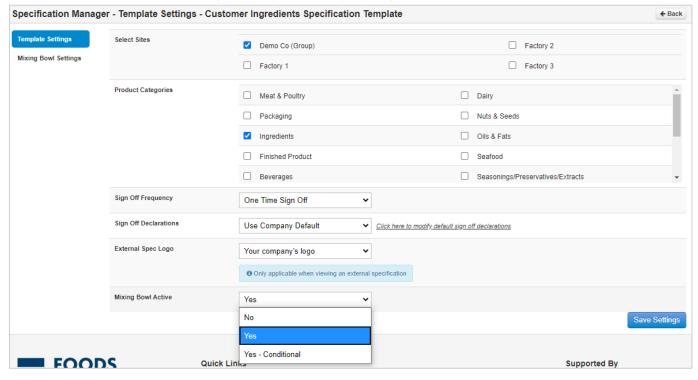


2.4. SETTING UP INGREDIENT SPECIFICATION

A template must first be created to set up the ingredients section. The Ingredient Specification includes captures product detail at an ingredient level.

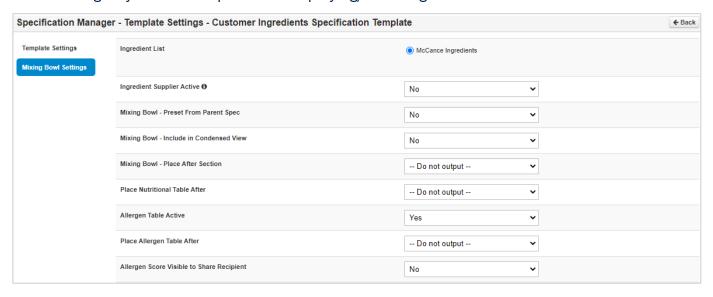
Step 1: Select Quality Management tab and select Specification Manager. Select the Template Manager tab, click on the *Options* button beside the template you want to edit the settings of and select Template Settings.

Step 2: Set the Mixing Bowl Active option to Yes or Yes – Conditional. Yes – Conditional, determines whether the mixing bowl options display dependant on the selected field.





Step 3: A new section on the right-hand side called **Mixing Bowl Settings** will display and clicking into it will give you a list of options for displaying/including certain functions.



Step 4: Use the dropdown fields to select the relevant options for your template, if you are using scoring within your template, you can also set the scoring options on this page. Click on *Save Settings* to apply your changes to the template.

Percentages or Weights

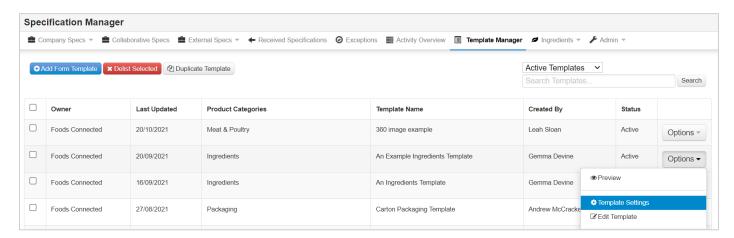
In the Mixing Bowl settings of the Template Settings, you can choose whether you would prefer the components in your recipe to be measured by weight or percentage. Then you can also choose whether to display mixing bowl % and/or finished product % and whether to use g, Kg. ml or L.



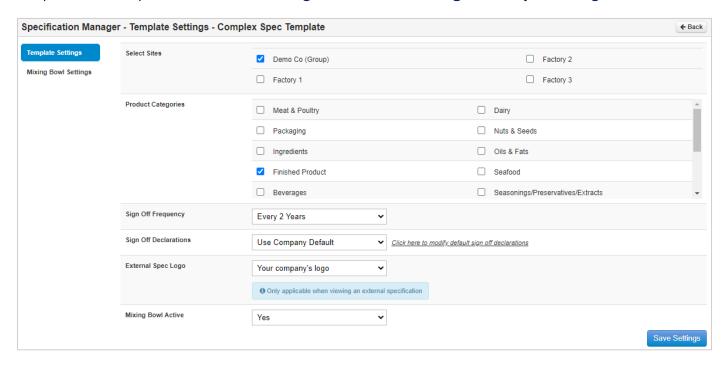


2.5. EDITING SPECIFICATION TEMPLATE DETAILS

Step 1: Select Quality Management tab and select Specification Manager. Select Template Manager tab, click on the Options button beside the template you want to edit the settings of and select Template Settings.



Step 2: The sites, product categories, frequency and sign off/logo settings that are relevant for this template can be updated within the settings. Select Save Settings to save your changes.

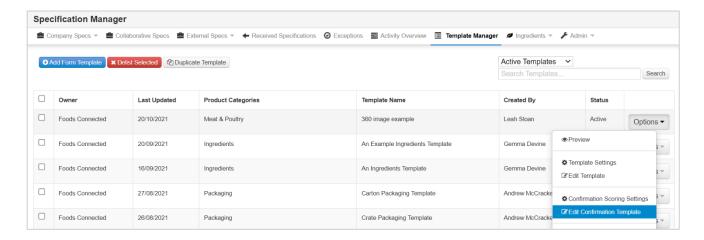




2.6. CREATING A CONFIRMATION TEMPLATE

A confirmation template can be built for a user to fill in when a specification is being approved.

Step 1: Select Quality Management tab and select Specification Manager. Select the Template Manager tab, click on the Options button beside the template you want to create a confirmation template for and select Edit Confirmation Template.



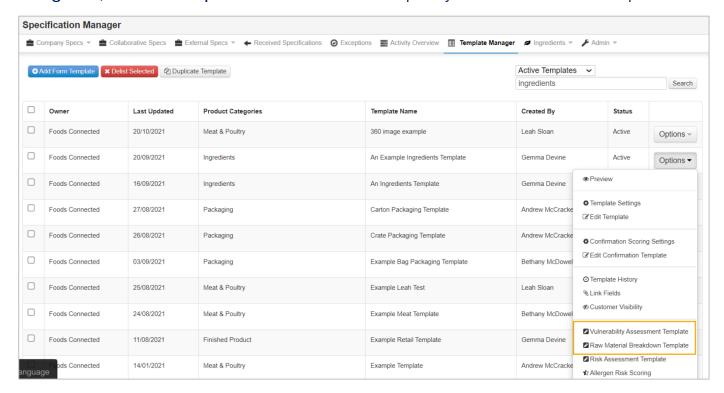
Step 2: Follow the *Form Builder* user guide for creating the template.

2.7. CREATING VULNERABILITY ASSESSMENT AND RAW MATERIAL BREAKDOWN TEMPLATES

With the ingredient specification templates, when the mixing bowl setting is switched on for the template, you have the option to use additional templates that are completed for each ingredient component within the specification.



Step 1: Select Quality Management tab and select Specification Manager. Select the Template Manager tab, click on the Options button beside the template you want to edit these templates for.



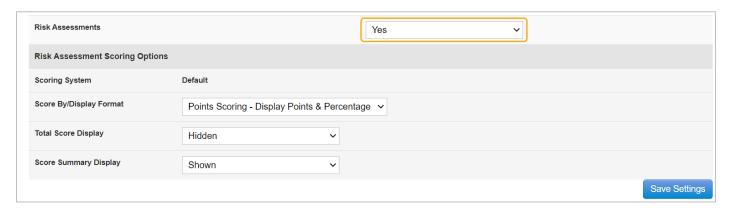
Step 2: You can build the vulnerability assessment and raw material breakdown templates by clicking on the relevant option and using the standard form builder functionality.



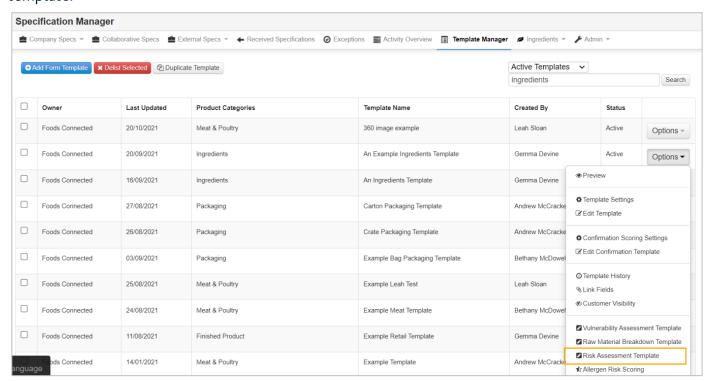
2.8 CREATING RISK ASSESSMENT TEMPLATES

With the ingredient specification templates, when the mixing bowl setting is switched on for the template, you have the option to use a risk assessment template that is completed for each ingredient component within the specification.

Step 1: When editing the template settings, you can switch on the option for Risk Assessments and further fields will open up below to allow you to select which type of scoring you'd like to use. Click on Save Settings to save any changes made.

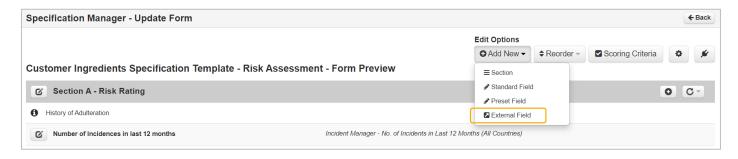


Step 2: The risk assessment template can be edited from the **Options** button beside your ingredients template.



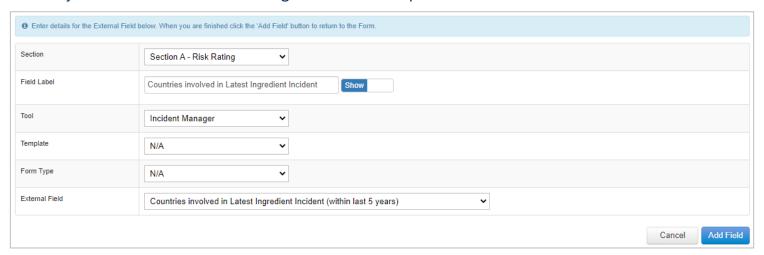


Step 3: The risk assessment template uses the standard form builder functionality, but you can also pull external fields into this template. To do this click on **Add New** and select the **External Field** option.



Step 4: You can select an external field from various tools as seen below (these are the current available options), once you select a tool it will show the available field options for that tool in the next dropdown fields. Select the options relevant for the field you want to pull into the risk assessment.

Step 5: Click on **Add Field** to add the external field into your risk assessment template. When completing this risk assessment for each ingredient component within your specification, it will pull in any relevant information according to the selected options.

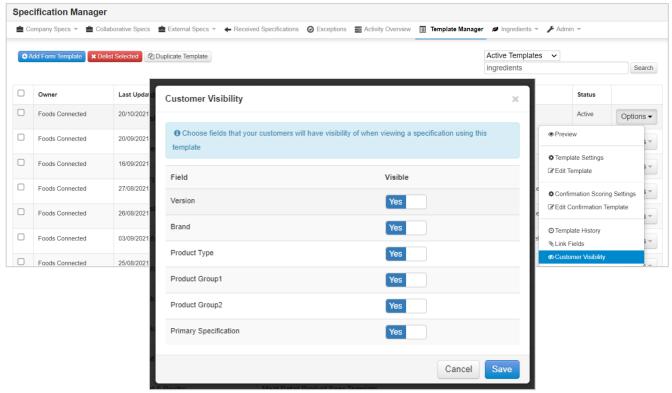


2.9 EDITING CUSTOMER VISIBILITY OF A TEMPLATE

A customer first must be provided with access to view linked specifications. Once access has been provided their visibility can be limited as required.



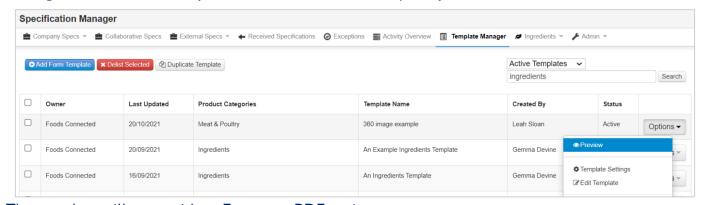
Step 1: Select Quality Management tab and select Specification Manager. Select the Template Manager tab, click on the Options button beside the template you want to edit the customer visibility for and select Customer Visibility.



Step 2: A pop-up window will open displaying some turn on/off options for what your customer will see when they are viewing specifications created using this template, click on **Save** after making any changes.

2.10. PREVIEWING A SPECIFICATION TEMPLATE AND ITS HISTORY

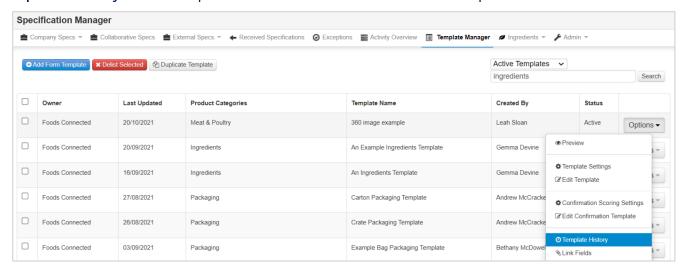
Step 1: Select Quality Management tab and select Specification Manager. Select the Template Manager tab, click on the Options button beside the template you want to view and select Preview.



The template will open with an Export to PDF option.

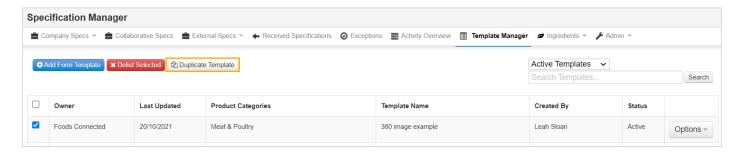


Step 2: To view a template's history, click on the Options button beside the template and select Template History. This will open a list of all the edits made to the template.



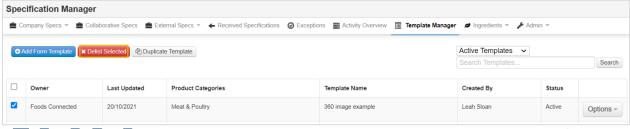
2.11. DUPLICATING A SPECIFICATION TEMPLATE

Step 1: Select Quality Management tab and select Specification Manager. Select the Template Manager tab, the checkbox beside the template that you would like to duplicate and click on the Duplicate Template button at the top of the page.



2.12 DELISTING A SPECIFICATION TEMPLATE

Step 1: Select Quality Management tab and select Specification Manager. Select the Template Manager tab, tick the checkbox beside the template that you would like to delist and click on the





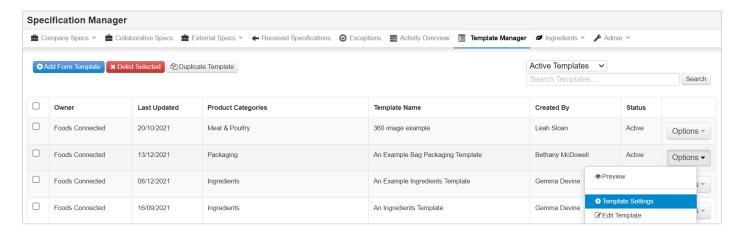
Delist Selected button at the top of the page. The specification template will now be delisted and no longer available to use for new specifications.

Step 2: To view delisted templates, from the **Template Manager** page, change the dropdown at the top right-hand corner from **Active Template** to **Delisted Templates**. You can also activate a delisted template by using the **Activate Selected** button at the top of the page.

2.13 ADDING TRANSLATIONS INTO A SPECIFICATION TEMPLATE

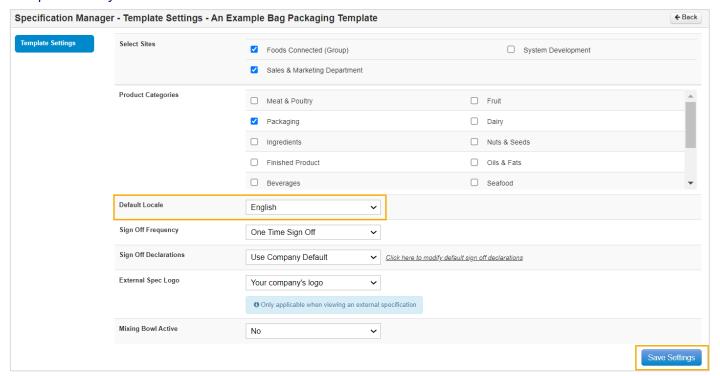
For each specification template, you can add translations so the template will display in the user's default locale.

Step 1: Select Quality Management tab and select Specification Manager. Select the Template Manager tab and from the Options menu beside your specification, click on Template Settings.



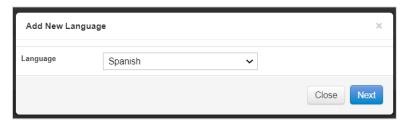


Step 2: Select your default locale and click on **Save Settings**. This will be the main language of the template that you translate from.



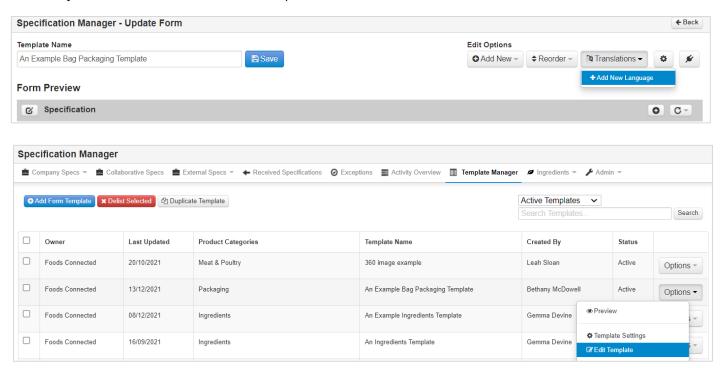
Step 3: From the **Template Manager** tab of **Specification Manager**, select **Edit Template** from your template options menu.

Step 4: Click on the translations button at the top of the page and select **Add New Language**. A popup window will open for you to select your language, pick the language from the dropdown and click on **Next**.



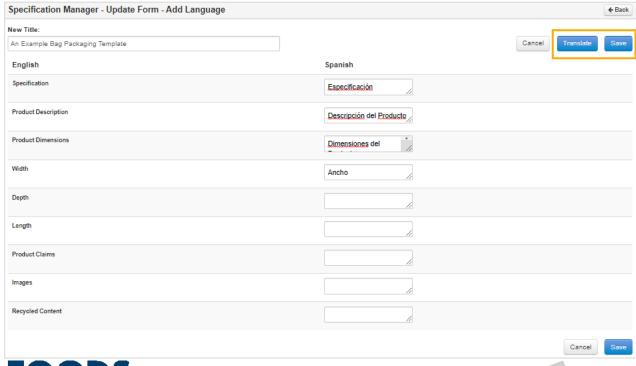


Step 5: A page will open with your field names and a textbox to complete the translation; this can be filled in manually or you can use the **Translate** button. If you use the translate button, you can still manually edit the translations where required.



*Clicking on **Translate** after you have manually filled in translations will overwrite what has already been filled in.*

Step 6: Once you have filled in the translations, click on Save to complete adding on the translation.





Step 7: After you have added on a translation, it will show under the **Translations** button for you to edit and update as required. Also, every time new fields/sections are added into the form, the translate page will open automatically for you to add the relevant translations.



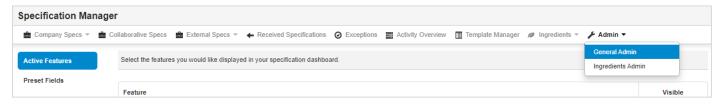
Once you have set up your translation, if a user has that language set as their default locale in their user profile settings, the specification will display in that language.

The same setup can be completed for the other linked specification forms - confirmation, risk assessment, vulnerability and raw material breakdown.

2.14 ADDING CUSTOM VIEWS INTO A SPECIFICATION TEMPLATE

Custom views for your specification can be created from the template setup. These allow users to create views of their specifications with different layouts and exclude fields/sections where applicable for certain views.

Step 1: Go to the Quality Management menu and select Specification Manager. Select the Admin tab and click on General Admin.

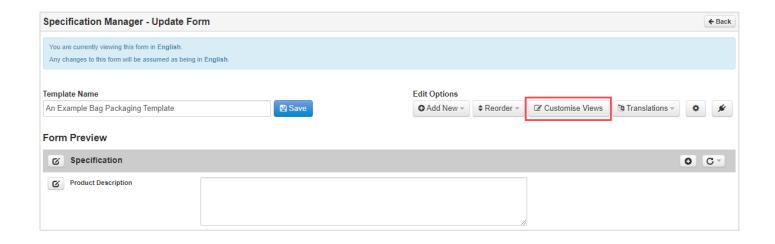




- **Step 2:** In the **Active Features** section, tick the checkbox for **Template Custom Views** to activate this option. Click on **Save Settings** to save the change.
- Step 3: A new tab will appear in the Admin page for Template Custom Views. Here you can add the names of your custom views by typing them into the textbox and clicking on the save icon to save them.

Specification Manag	er	
⚠ Company Specs ▼ 👜	Collaborative Specs 🐞 External Specs 🔻 🗲 Received Specifications 🥝 Exceptions 🚆 Activity Overview 📳 Template Manager 🥒 Ingredients 🔻 🗡 Admin 🔻	
Active Features	Manage custom views available when building templates.	
Preset Fields		
Visible Columns	Custom View Name	
Export To PDF / View	Custom View 1	
Internal Approval	Enter new view name	
Collaborative Approval	Litter flew view flatife	
External Approval		
Notifications		
Internal Spec Review		
External Spec Approval		
Template Custom Views		
	Share Specification Condensed	✓
	Template Custom Views	~
		Save Settings

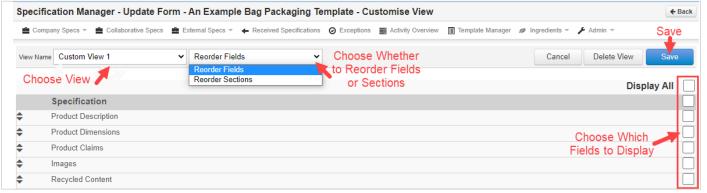
Step 4: Once you have added in your custom view name(s), you can create your custom views in the specification template setup. Go to the **Template Manager** tab, search for the specification template that you would like to create a custom view for, click on the **Options** menu beside the template and select **Edit Template**.





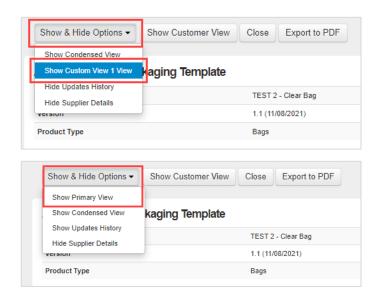
Step 5: Click on the Customise Views button at the top of the page.

Step 6: Select the name of the view you would like to create/edit. You can choose to reorder fields/sections for your view as well as select which fields will display in the view. Once you have made your changes click on **Save** to save the setup. Follow the same steps if you have multiple views to create. You can edit/delete custom views from this same page. *The setup selected will only apply to that view, it will not affect the initial setup of the template*



Step 7: When viewing one of your specifications that has been built using the template you added the custom views into, you will have the option to view the custom view. Click on Show & Hide Options and here you will see the option to view your custom view(s). You can then view/export this view as required.

Step 8: To revert back to the main view, click on **Show & Hide Options** and select **Show Primary View**.





3. CREATING AND MANAGING COMPANY SPECIFICATIONS

3.1. CREATING A COMPANY SPECIFICATION

Step 1: Select Quality Management tab and select Specification Manager. Select the Company Specs tab and click on New Specification. Customers will see the various options:

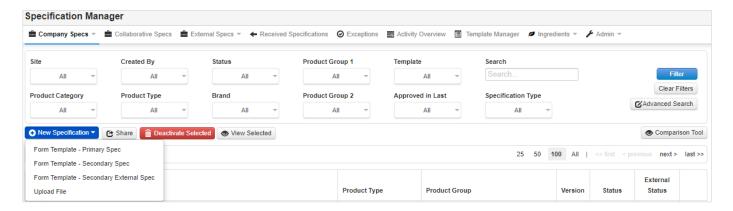
Primary Spec – create a specification with no prepopulated information specifications or, complete specific fields to populate information required for a **Secondary Spec**.

Secondary Spec – prepopulates information from a Primary Spec that has been created.

Secondary External Spec - prepopulates selected information from external specs.

Upload File - upload specification files into Foods Connected.

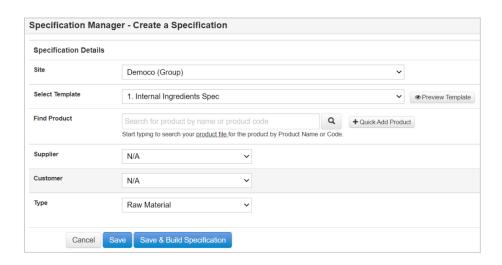
Suppliers will only have the option to create a primary spec from customer shared templates.



Step 2: Select your relevant option and then a page will open to set your specification details. Select the specification site, template, and product. The supplier and customer options are not mandatory.



If you are creating a specification in response to a request from your customer, you will select the template and product that your customer shared with you through the system. You can link your own product details to the specification by using the Quick Add Product button.



If you have the **auto generate product codes** option switched on in your product file settings, when you use the **Quick Add Product** function, the product code will automatically generate based of the prefix and seed you have set.

*Select 'Raw Material' for **Type** unless you are creating a specification for a finished product, see section 3.12 for steps on creating a finished product specification.

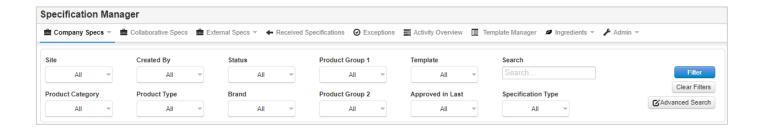
Step 3: Click on **Save & Build Specification** to open the template, fill in your specification details using the **Save** button to save your progress.



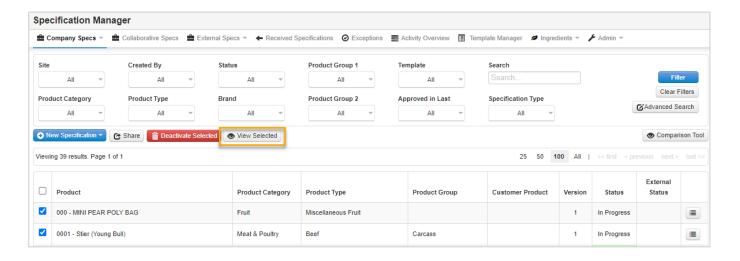


3.2. VIEWING AND SEARCHING FOR A COMPANY SPECIFICATION

Step 1: From the Company Specs page, you can use the filters along the top of the page to refine your results when searching for a specification. You can use the search box for searching for product names/codes, alternative product names/codes and linked product information. You also have the Advanced Search option for a more in-depth search through all the completed specifications.

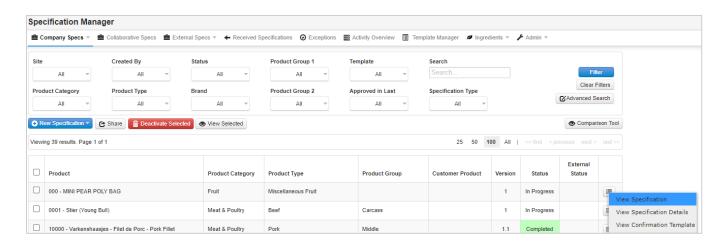


Step 2: When you have found the specification you would like to view, click on the menu button to the right of the specification and select View Specification. You can also select the View Specification Details option from this menu to see the details of the specification.



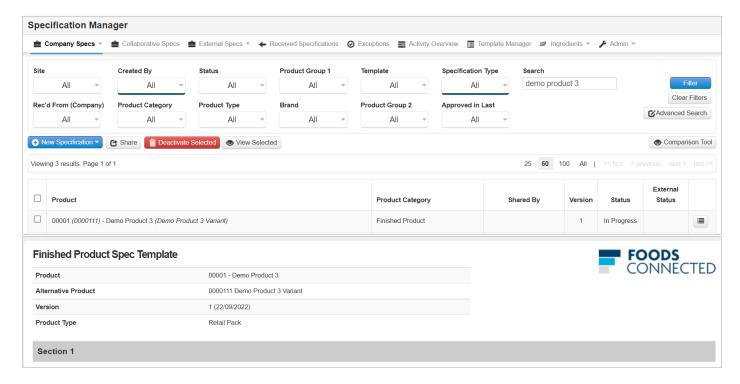


Step 3: To view more than one specification at once, tick the checkboxes of your selected specifications and click on the **View Selected** button to open one window with all the selected specifications.



*If you have added an alternative product code/name for your product in the product file, this will display in the Company Specs list and within the specification itself.

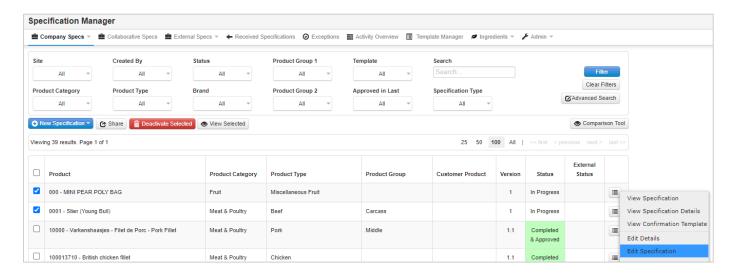
The alternative code/name displays in brackets after the main code/name within the Company Specs list and at the top of the specification when viewing the specification.





3.3. EDITING A COMPANY SPECIFICATION

Step 1: From the **Company Specs** page, click on the menu button to the right of the specification you would like to edit and select **Edit Specification**.



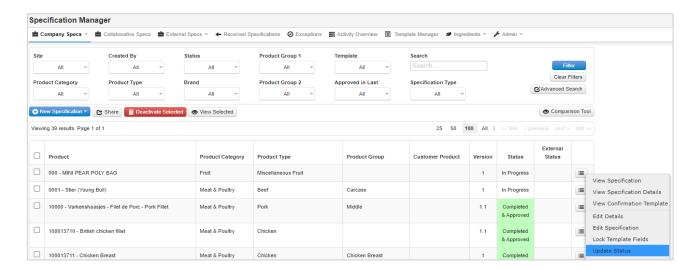
- **Step 2:** When the specification opens you can make the required changes then click on **Save** to update the specification.
- **Step 3**: You can also edit the specification details by selecting the **Edit Details** option from the menu to the right of the specification, making sure to click on *Save*.

3.4. UPDATING THE STATUS OF A COMPANY SPECIFICATION

When saving a specification, a pop-up window will open asking you to review the specification status, you can click on the Close / Leave as Current Status button until you are ready to change the status.



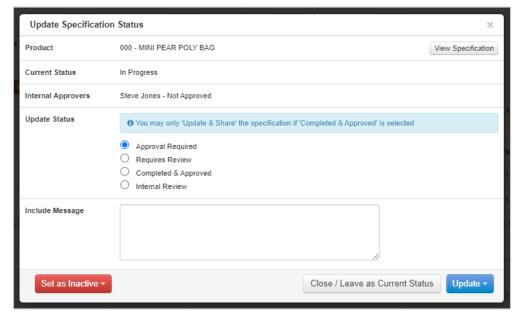
Step 1: From the **Company Specs** page, click on the menu button to the right of the specification you would like to update the status for and select **Update** *Status*.



You have various status options:

- Completed & Approved you can select this if no approvers are set up or you are an approver, and this will set the specification as approved.
 A Specification can only be marked as Completed & Approved when all mandatory fields have been complete
- Approval Required if you are not an approver, you can set the specification to this status to notify the approver(s) that the specification requires approval.
- Requires Review / Internal Review these statuses can be used when the specification has not been approved yet.

Step 2: Select the relevant status and click on Update Status to save it.

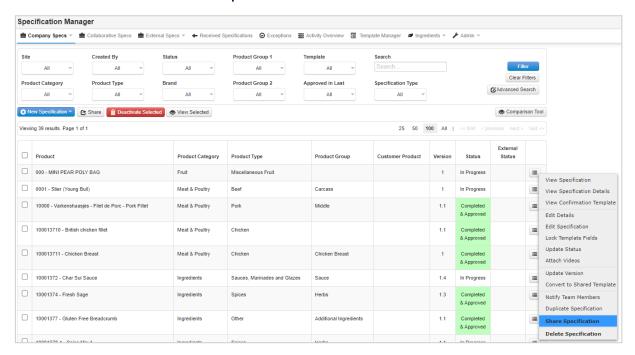




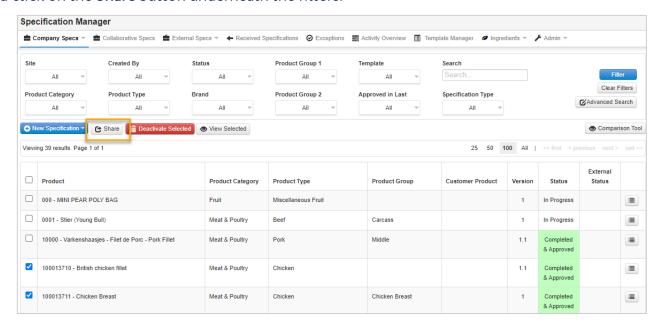
3.5. SHARING A COMPANY SPECIFICATION AND VIEWING THE SIGN OFF REVIEW

Specifications can only be shared when they have a status of Completed & Approved.

Step 1: From the **Company Specs** page, click on the menu button to the right of the specification you would like to share and select **Share Specification**.



When sharing more than one specification, you can tick the checkboxes of the relevant specifications and click on the **Share** button underneath the filters.

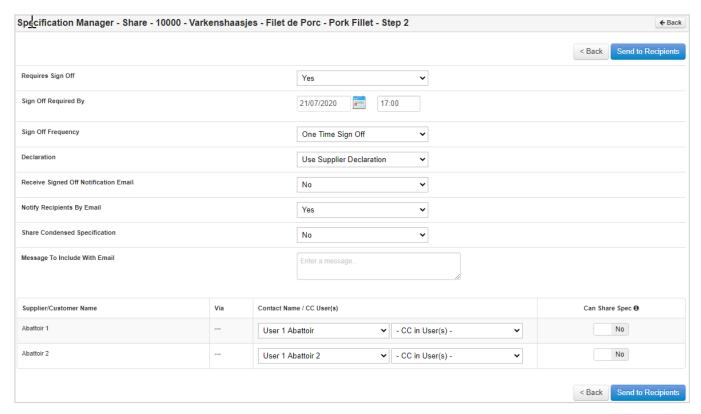




- Step 2: A list of your suppliers and customers will show, select the ones you would like to share the specification with and click on Next Step.
- **Step 3**: Select the relevant sign off settings (this frequency set here will determine how often the system prompts the supplier/customer to re-sign off the specification) and the user.

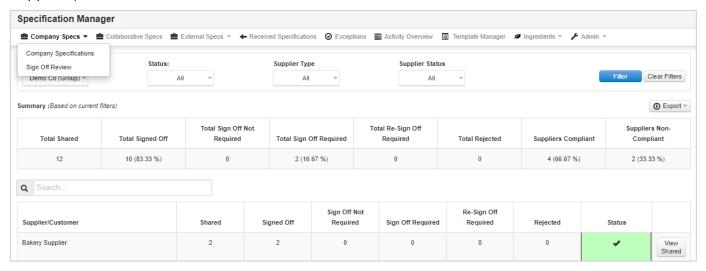


Step 4: Click on **Send to Recipients** to share the specifications, the selected user(s) will receive notification from the system, and they will be able to view the shared specification(s) from their account.

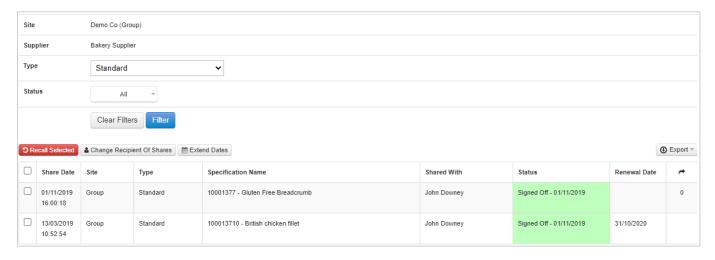




Step 5: To review specification shares and sign offs from the **Sign Off Review** option you will see when clicking on the **Company Specs** tab. Use the filters and search box to find your suppliers/customers and review what has been shared with them.

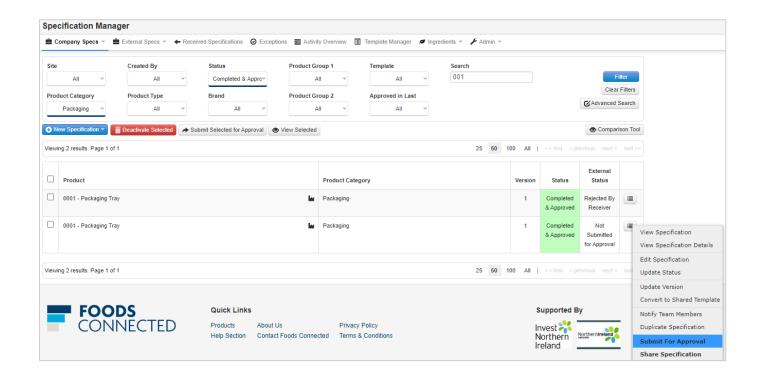


Step 6: If you click on the **View Shared** option beside any of the suppliers/customers, you can see a full list of the specifications shared with them. You also have options for recalling shares, changing who the specification was shared with and extending the sign off date.



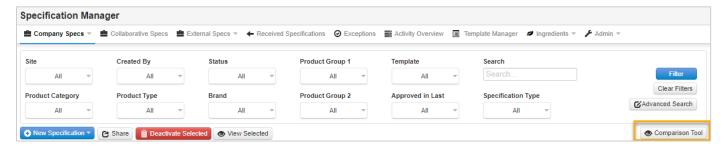
If sharing a completed specification back to your customer, you can select the **Submit for Approval** option from the menu to the right of your specification. This will open a page for you to select which customer user to notify and then you can share it.





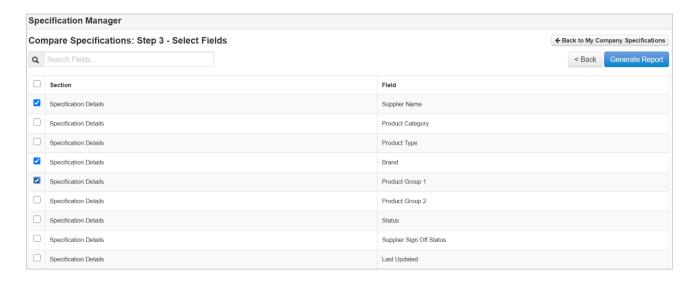
3.6. COMPARING SELECTED COMPANY SPECIFICATIONS

Step 1: From the Company Specs page, click on the Comparison Tool button underneath the filters.





- **Step 2:** Select the template used for the specifications you want to compare as well as any relevant site/product options, then click on **Next Step**.
- Step 3: Select the specifications you would like to compare, click on Next Step.
- Step 4: Select the specification fields you would like to compare and click on Generate Report.

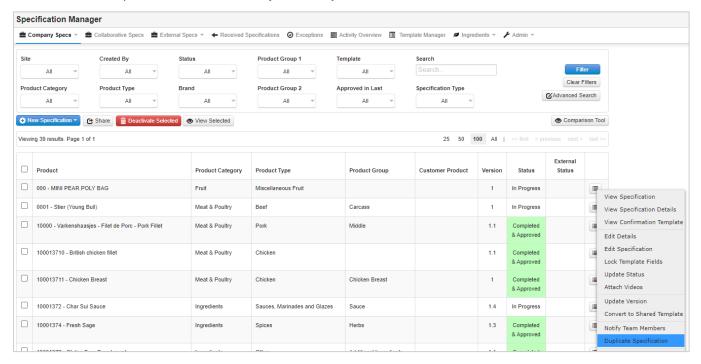


Step 5: A table will be generated pulling in the selected information, this can be exported to excel by clicking on the **Export to Excel** option at the top of the page.

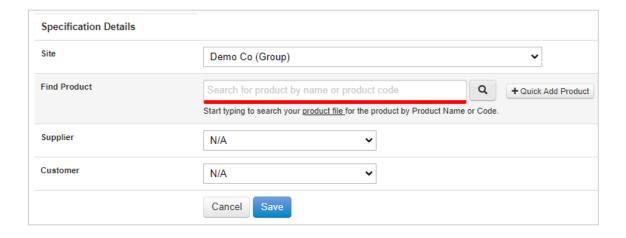


3.7. DUPLICATING A COMPANY SPECIFICATION

Step 1: From the **Company Specs** page, click on the menu button to the right of the specification you would like to duplicate and select **Duplicate Specification**.



Step 2: Select the **Site / Product** for the specification and optionally the **Supplier / Customer** and click on **Save**.

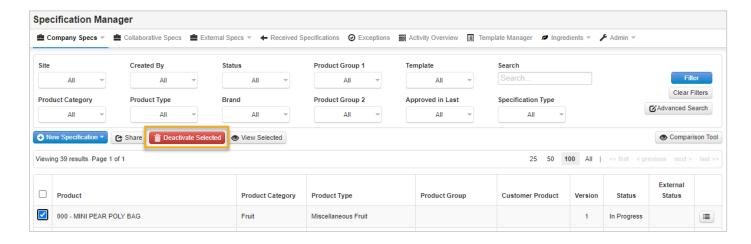


Step 3: A duplicate specification will be created with the same content as the original with the new site/product.

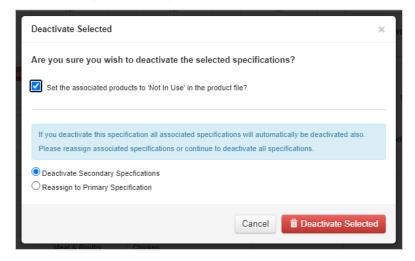


3.8. DEACTIVATING A COMPANY SPECIFICATION

Step 1: From the **Company Specs** page, tick the checkbox of the specification you would like to deactivate and select the **Deactivate Selected** underneath the filters.



Step 2: This will open a pop-up window to select to also set the associated product to **Not in Use**, click on **Deactivate Selected** to update the specification's status.



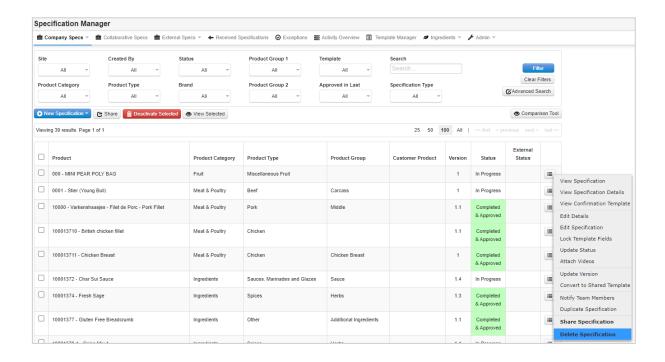
Step 3: If this is a parent spec that you are deactivating you will have the option to deactivate all related secondary specifications or to reassign them to another primary specification.



3.9. DELETING A COMPANY SPECIFICATION

Deleted specifications will be permanently removed – Deactivating should be used for specifications which are no longer needed but a record is still required.

Step 1: From the **Company Specs** page, click on the menu button to the right of the specification you would like to delete and select **Delete Specification**.

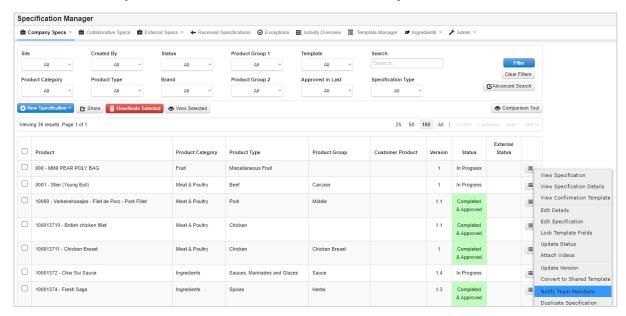


Step 2: This will open a pop-up window to confirm your action, click on Delete Specification.

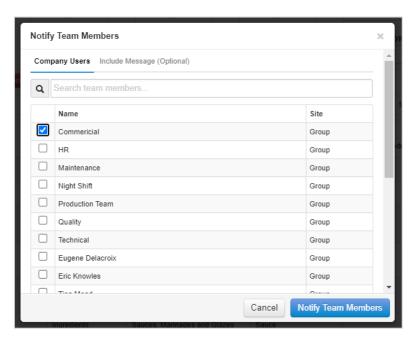


3.10. NOTIFYING TEAM MEMBERS ABOUT A COMPANY SPECIFICATION

Step 1: From the **Company Specs** page, click on the menu button to the right of the specification you would like to notify team members about and select **Notify Team Members**.



Step 2: Select the users you would like to send a notification to and input an optional message, click on **Notify Team Members** to send the notification.

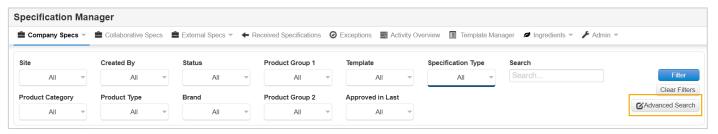




3.11. USING THE ADVANCED SEARCH

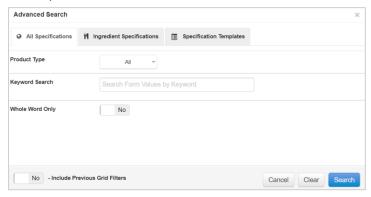
The advanced search option is available for Company Specs and External Specs, it allows you to carry out a more detailed search within your specifications.

Step 1: Within the Company Specs or External Specs section of Specification Manager, you will find the Advanced Search button with the filter options.



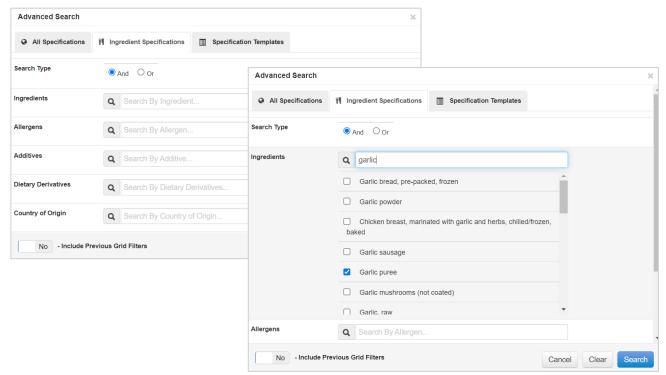
Step 2: You have three options for advanced searching:

 All Specifications – Use this option for a keyword search, this will search through all your specification fields for the input word. You can adjust the product type and whole word only settings as required.



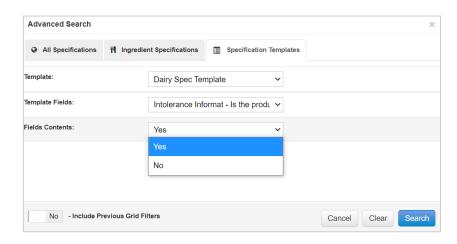
2. Ingredient Specifications – This option can be used for your ingredient specifications, when you start to type into these search boxes, it will display a list of available options for you to select. You can use the search type option to modify whether all your selected criteria need to apply to the specification or any of the selected criteria can apply.





3. Specification Templates – This option can be used for searching for a specific response to a dropdown/checkbox field within your specification template.

Step 4: Once you have selected the option you would like to use and set the settings, you can select whether to include the previous filters you had set or not. I.e., before you clicked on the advanced search button, if you had filters set you can switch this option on to maintain those filters in your advanced search. Click on **Search** to find your results.



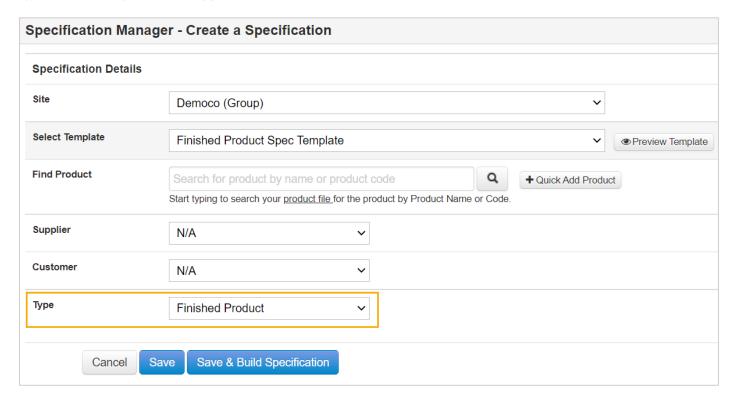


3.12. CREATING A FINISHED PRODUCT SPECIFICATION

A finished product specification can be created with a mixing bowl which pulls in detail from raw material specifications that have been built in Foods Connected internally or by suppliers.

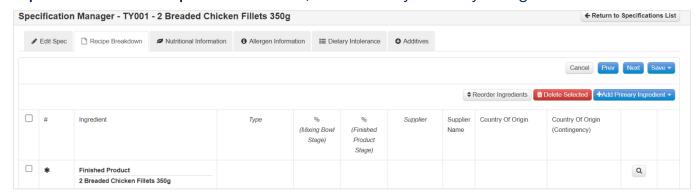
Step 1: Go to the Quality Management tab and select Specification Manager. Select the Company Specs tab and click on New Specification (Primary Spec).

Step 2: A page will open to set your specification details. Select the specification site, template, and product. The supplier and customer options are not mandatory. As this is a finished product specification, update the **Type** field to 'Finished Product'.



Step 3: Click on Save & Build Specification to open the template, the Edit Spec tab can be completed as a normal form.

Step 4: Click on the Recipe Breakdown tab, this is where you fill in your ingredient list.



*If you have set your ingredient measurement to be weight, you will see a weight column in the recipe table and a weight field to complete in the 'Add Ingredient' page instead of the %s.

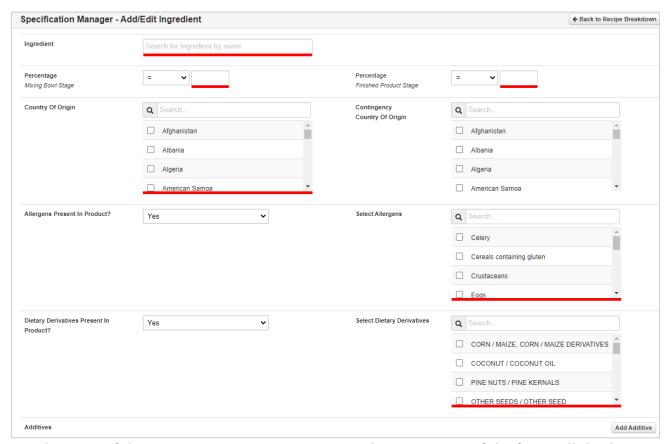


Step 3: The finished product will display in the table, click on **Add Primary Ingredient** then **Add Single Ingredient** to add ingredients into the ingredient list of the product.

A form will open with various 'Ingredient Search Source' Options. Depending on the option you choose the form displayed below will alter.

If you select 'Ingredient Table' or 'Internal Product File', you will see the full form to complete:

- Type in the ingredient/ product name and select it from the list which appears (if you cannot find your ingredient from the database, you can add one on manually).
- Input the percentages for the mixing bowl stage and the finished product stage (or weight if weight has been selected as the measurement type).
- Select the country of origin and contingency country if applicable.
- Select which allergens are present in the product.
- Select which dietary derivatives are applicable for the product.
- If the ingredient contains additives, click on *Add Additive* and a pop-up window will open, then select and fill in the relevant information and click on *Save*.



If you select one of the specs options as your source, a shorter version of the form will display because the system will automatically pull in the rest of the information from the source specification that has already been created on Foods Connected.



- Type in the product code/name for your specification and select it from the list which appears
 (only specifications which have the mixing bowl option turned on will appear in this list).
- Input the percentages for the mixing bowl stage and the finished product stage (or weight if weight has been selected as the measurement type).

Specification Manager - Add/Edit Ingredient Ingredient Search Source O Ingredient Table O Internal Specs										
Ingredient Search Source										
	Internal Specs External Specs									
	O Collaborative Specs									
	O Internal Product File									
Ingredient	Search for Ingredient by name	Supplier	Enter supplier name							
Percentage Mixing Bowl Stage	=	Percentage Finished Product Stage	=							

When the ingredient information is complete, click on *Save* and *Save* & *Exit* which will take you back to the *Recipe Breakdown* tab. You can continue to add ingredients into your recipe until it is complete. The table will display the source of each component in the *Type* column.



Click on the arrow beside specification source component to view the sub-components. You can also click on the specification name to directly open the source specification.





Step 4: If a vulnerability assessment is being used, to complete it for an ingredient, click on the dropdown arrow to the right and select **Vulnerability Assessment**.

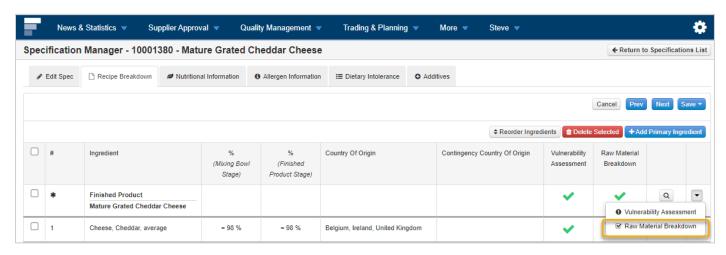
- Select the ingredient touch points and their risk level by clicking on Select beside each
 relevant point. The selected touch points will appear to the right, reorder them by clicking on
 the arrows and dragging them into the correct position, delete points by clicking on the delete
 icon.
- Complete the vulnerability assessment form and click on Save & Exit to return to the Recipe Breakdown tab. The red X under the Vulnerability Assessment beside the ingredient will turn to a green tick once you save.

*Complete the Vulnerability Assessment for each ingredient as applicable.



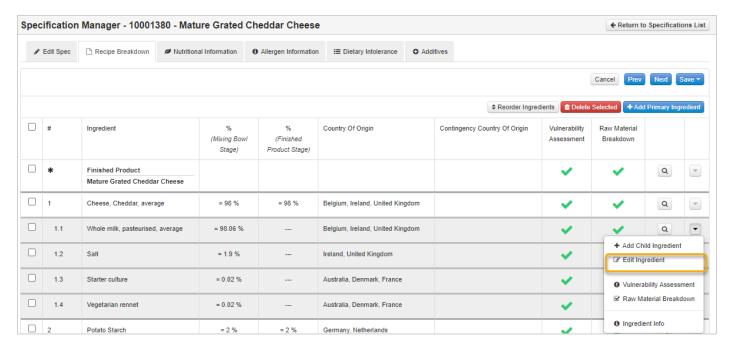
Step 5: To complete a raw material breakdown for an ingredient if relevant, click on the dropdown arrow to the right and select Raw Material Breakdown. Complete the raw material breakdown form and click on Save & Exit.

*Complete the Raw Material Breakdown for each ingredient if applicable.





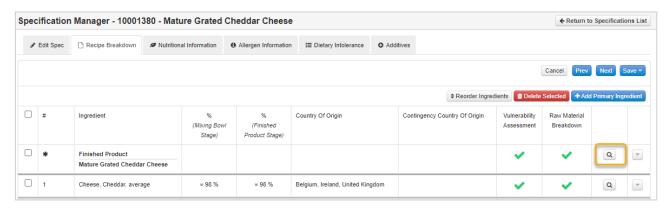
Step 6: To edit ingredient information, click on the dropdown arrow to the right and select **Edit Ingredient**; making sure to click on **Save** for any changes made.



Step 7: To delete an ingredient from the recipe breakdown, tick the checkbox beside it and click on **Delete Selected**.



Step 8: To view the information you have completed for an ingredient click on the **magnifying glass** beside the product.

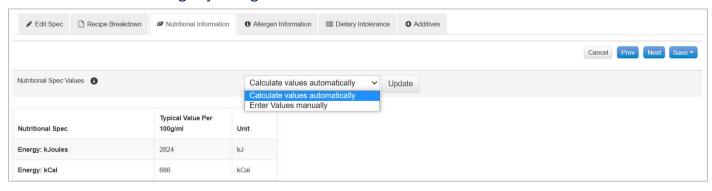




Step 9: To change the order of the ingredients in the list, click on **Reorder Ingredients**. A new page will open, click on the arrows to the left of the ingredient and drag into the correct position. When you are finished click on **Done**.

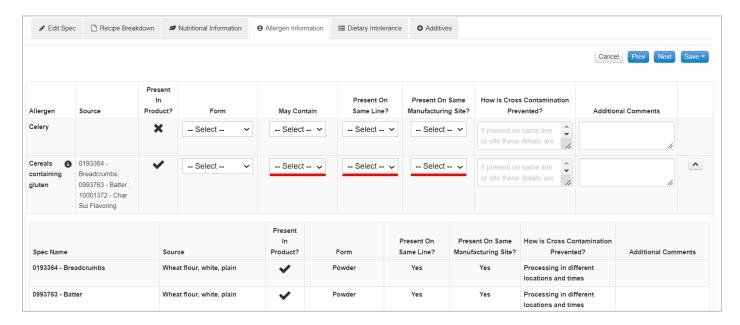


Step 10: All the ingredients added into the Recipe Breakdown will be automatically added into the Ingredient List and their nutritional values will be automatically calculated in the Nutritional Information tab from the sources input into the recipe table. If you want to manually input your nutritional values, from the Nutritional Information tab, change the dropdown to Enter values manually and click on Update then it will open boxes to input the values manually. Remember to click on Save after making any changes.

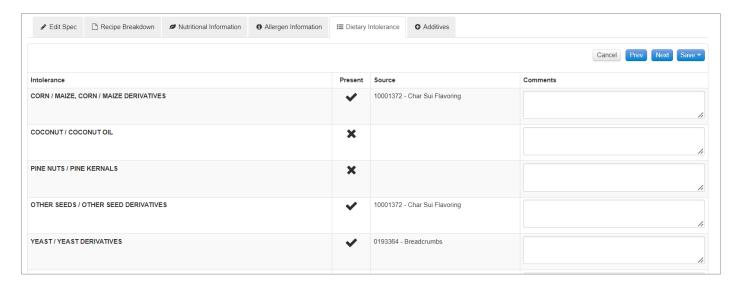


Step 11: If you select an allergen for one of the product's ingredients, it will pull through to the **Allergen Information** tab and display as present in the product with the ingredient stated as the source. If allergens are contained within one of the source raw material specifications, this will display with a dropdown arrow so you can view the specification detail. Click on this tab, complete the information on the allergen and click on *Save*.





Step 12: If you select a dietary intolerance for one of the product's ingredients, it will pull through to the Dietary Intolerance tab and display as present in the product with the ingredient stated as the source. It will do the same if a dietary intolerance was highlighted in one of the source raw material specifications. Click on this tab, complete the information on the dietary intolerance and click on Save.



Step 13: The additive information for the ingredient product will be automatically added into the **Additives** tab based on the information you have input into the recipe breakdown.

Step 14: Click on Save to save all the information that has been input into the template.

*Once a finished product specification has been created, sections 3.3-3.11 are all relevant for carrying out those specific actions.

If a specification included in an approved finished product specification's recipe as a source is updated, the status of the finished product specification will update. If an approver is set up the

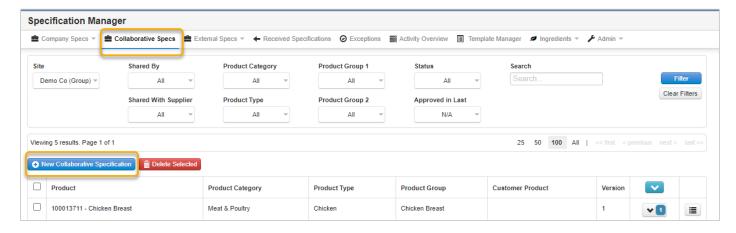


status will update to *Approval Required* and an email and task will be sent to the set approver. If there is no approver for the finished product specification, the status will update to *Requires Review* and the specification creator will receive an email and task.

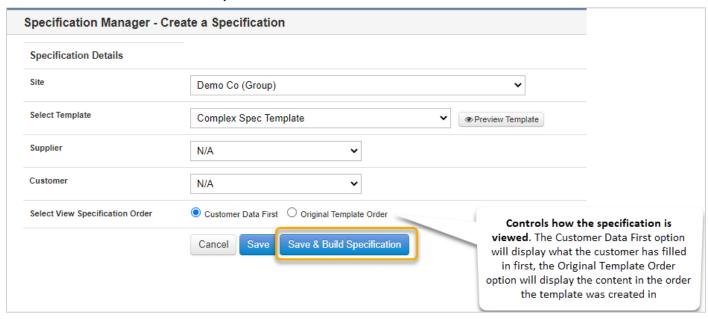
4. CREATING AND MANAGING COLLABORATIVE SPECIFICATIONS

4.1. CREATING A COLLABORATIVE SPECIFICATION

Step 1: Select Quality Management tab and select Specification Manager and select the Collaborative Specs tab.



Step 2: Click on **New Collaborative Specification** and a page will open to set your specification details. Click on **Save & Build Specification**.



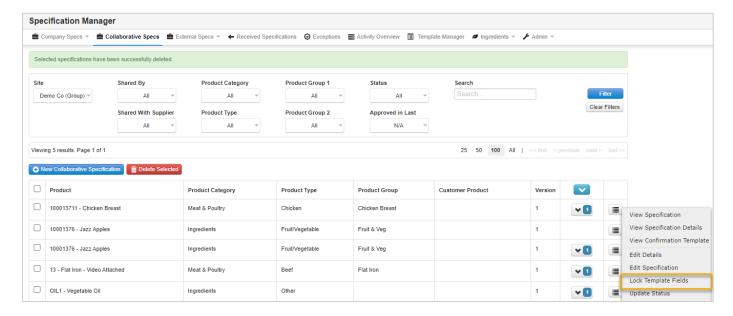
Step 3: The specification template will open, fill in the required information and click on **Save** to save the inputted information.



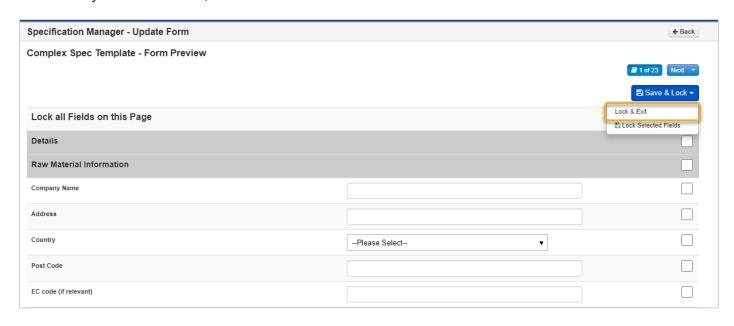
4.2. LOCKING TEMPLATE FIELDS FOR A COLLABORATIVE SPECIFICATION

This functionality allows you to 'lock' certain fields within your template that you as the customer want to complete but do not want your supplier to be able to edit. A supplier will be able to see a locked when they are completing the specification but it will be greyed out so they cannot edit it.

Step 1: From the **Collaborative Specs** page, click on the menu button beside the specification that you want to lock the fields for and select **Lock Template Fields**.



Step 2: A page will open showing the full specification template, tick the checkboxes beside the fields that you want to lock, then click on **Save & Lock** and **Save & Exit**.





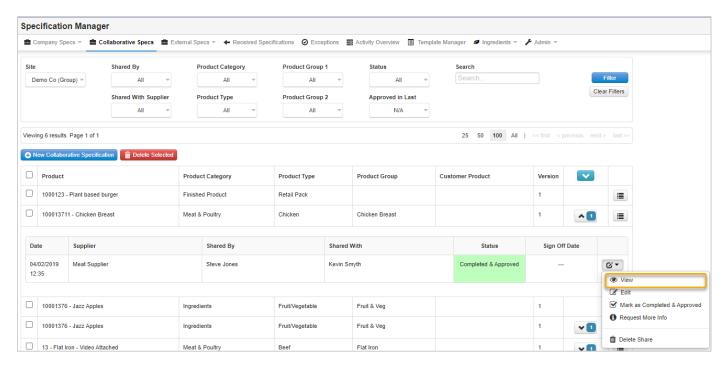
4.3. VIEWING AND SEARCHING FOR A COLLABORATIVE SPECIFICATION

Step 1: From the **Collaborative Specs** page, you can use the filters along the top of the page to refine your results when searching for a specification.

Step 2: When you have found the specification, you would like to view, click on the menu button to the right of the specification and select *View Specification*. You can also select the **View**

Specification Details option from this menu to see the details of the specification.

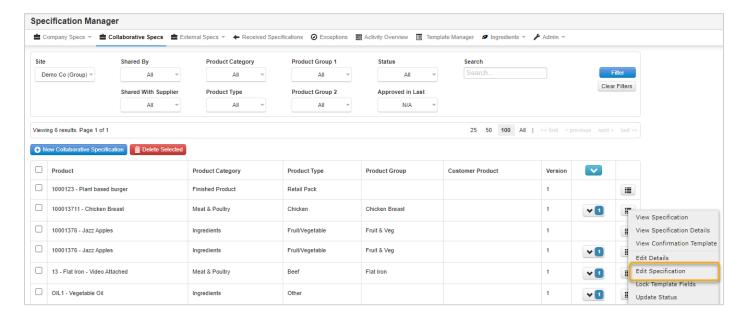
When you have shared a collaborative specification with a supplier click on the edit button to the right of the share to view the specification content for both the customer and supplier.





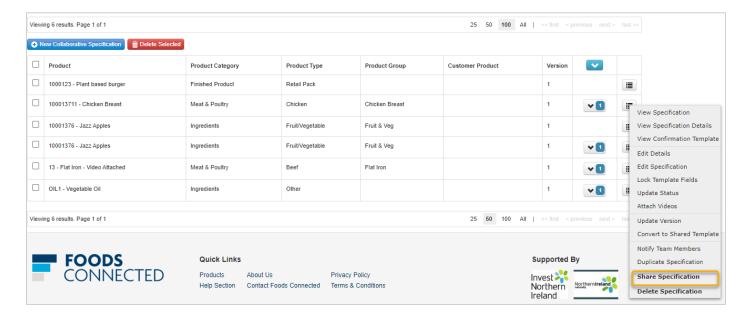
4.4. EDITING A COLLABORATIVE SPECIFICATION TEMPLATE

Step 1: From the **Collaborative Specs** page, click on the menu button beside the specification template that you would like to edit and select **Edit Specification**. This will open the specification template, make sure to click on **Save** to save the changes.



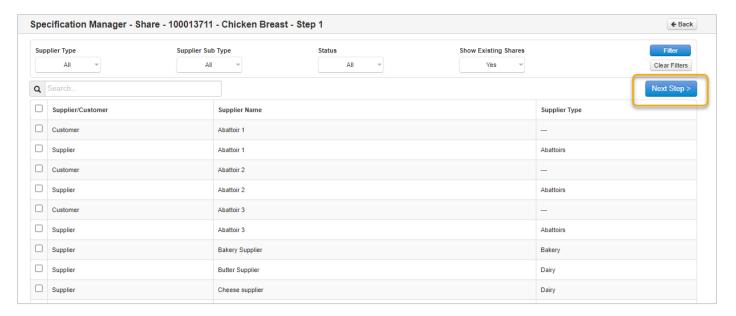
4.5. SHARING A COLLABORATIVE SPECIFICATION

Step 1: From the **Collaborative Specs** page, click on the menu button beside the specification template that you would like to share and select **Share Specification**.

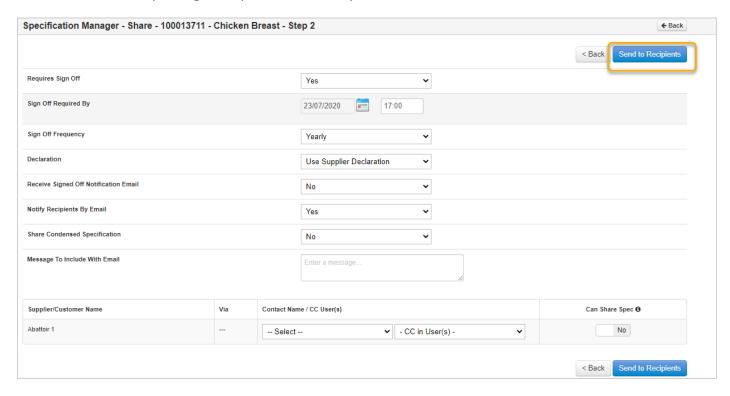




- Step 2: A page will open for you to select the supplier, click on Next Step.
- **Step 3**: Fill in details of the share, selecting the sign off detail and the user to receive the specification with for completion.

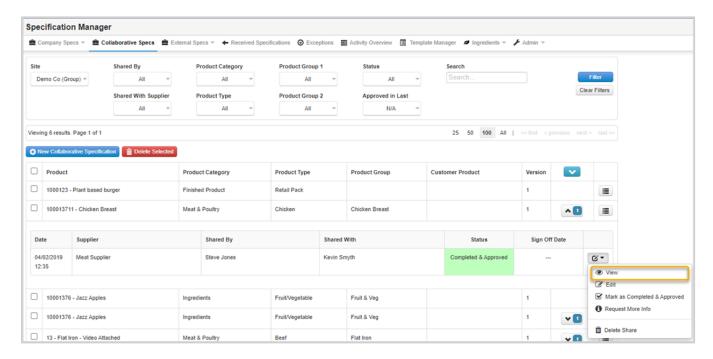


Step 4: Click on **Send to Recipients** and the supplier user will receive notification of the request and be able to start completing their parts of the template.





After sharing a template with a supplier, an expand arrow option will show to the right of the specification, opening this will show the share. All actions for actioning this shared specification will now be done from the edit menu to the right of the share.



4.6. EDITING A SHARED COLLABORATIVE SPECIFICATION

Step 1: From the *Collaborative Specs* page, click on the expand button beside the specification you have shared and from the edit button to the right of the share select the **Edit** option. This will open the shared specification, make sure to click on **Save** to apply the changes.

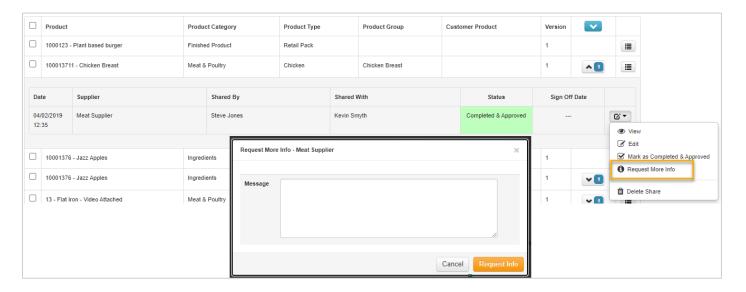




4.7. REQUESTING MORE INFORMATION ON A SHARED COLLABORATIVE SPECIFICATION

Step 1: From the **Collaborative Specs** page, click on the expand button beside the specification you have shared and from the edit button to the right of the share select the **Request More Info** option.

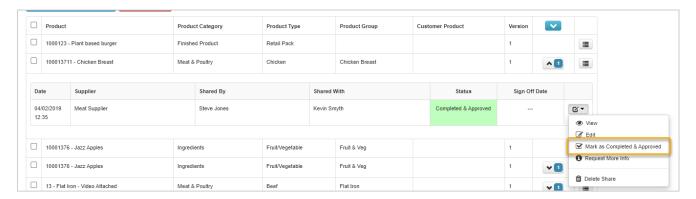
Step 2: Fill the details of your request into the pop-up window and click on Request Info to send the notification to the supplier.



4.8. APPROVING A COLLABORATIVE SPECIFICATION

Step 1: From the Collaborative Specs page, click on the expand button beside the specification you have shared and from the edit button to the right of the share select the Mark as Completed & Approved option.

Selecting this option will send a notification to the relevant supplier and they can also sign off the specification, the date they do this will show in the Sign Off Date box beside the share.

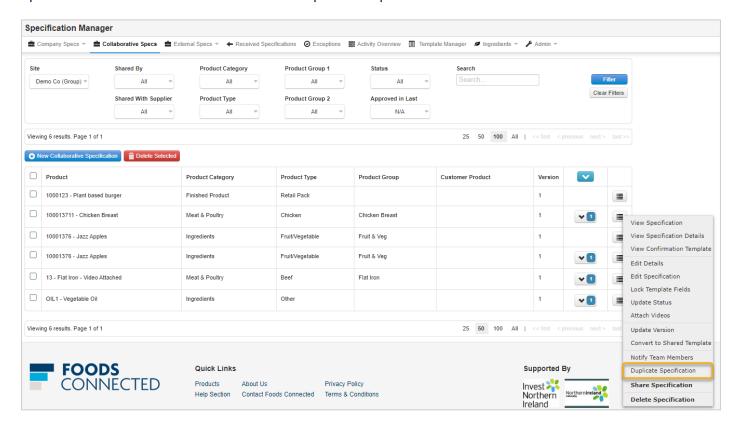




4.9. DUPLICATING A COLLABORATIVE SPECIFICATION TEMPLATE

Step 1: From the Collaborative Specs page, click on the menu button beside the specification template that you would like to duplicate and select Duplicate Specification.

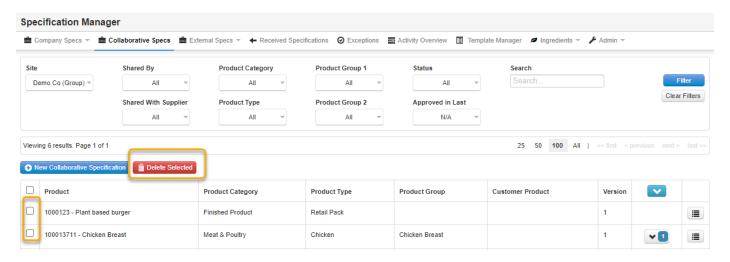
Step 2: Select the Site / Product and template order details, the Supplier / Customer fields are optional and click on Save to create the duplicated specification.



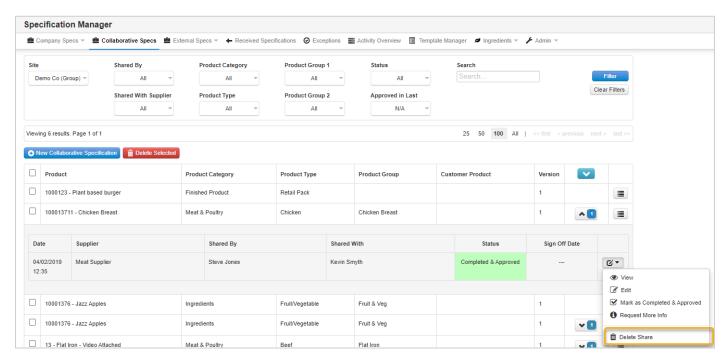


4.10. DELETING A COLLABORATIVE SPECIFICATION TEMPLATE OR SHARE

Step 1: From the **Collaborative Specs** page, click on the menu button beside the specification template that you would like to delete and select **Delete Specification**. This will delete the template and any related shares.



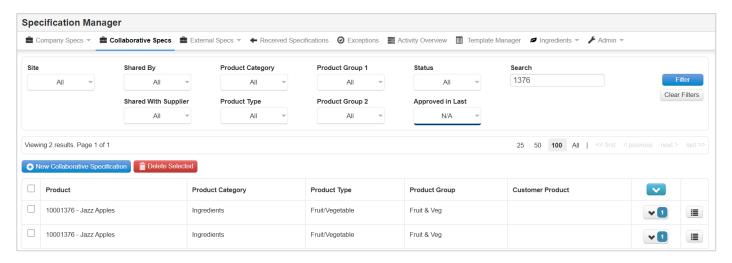
Step 2: To only delete a share, from the edit menu button to the right of the share, select **Delete Share** and this will only remove that share from the relevant supplier.



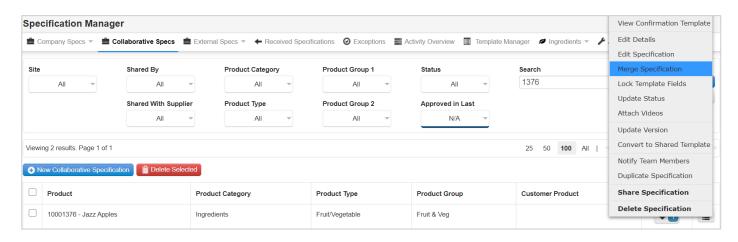


4.11 MERGING COLLABORATIVE SPECIFICATIONS

If two collaborative specifications have been created/shared under separate templates for the same product and they use the same template, you can merge these together to sit under one template. For example, see below:



Step 1: From the **Collaborative Specs** page, click on the menu button beside one of the specification templates that you would like to merge and select **Merge Specification**.

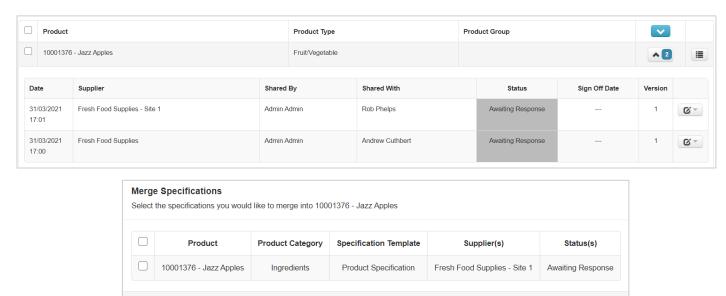




Merge

Close

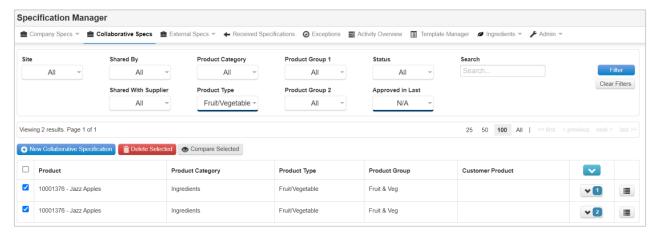
Step 2: A pop-up window will open with the details of any specifications that have the same product and template. Select the specifications you want to merge and click on **Merge**. The specifications will now show under the same template header.



This merge function will join the edit history of both templates for the customer to see but the supplier will still only see the edits made by them

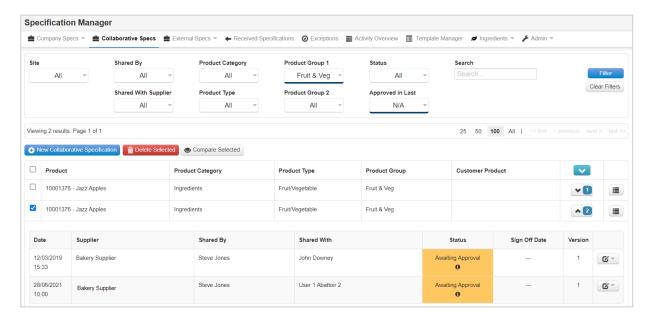
4.12 COMPARING COLLABORATIVE SPECIFICATIONS

Step 1: From the **Collaborative Specs** page, select the specifications you would like to compare and click on the **Comparison Tool** button underneath the filters. You can compare any specifications built using the same template.

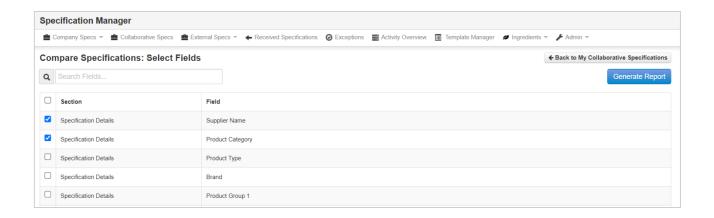




*If a collaborative specification has been shared with more than one supplier you can select just that one specification template and the system will compare both versions of the specification with the differing supplier responses.



Step 2: Select the specification fields you would like to compare and click on Generate Report.



Step 3: A table will be generated pulling in the selected information, this can be exported to excel by clicking on the **Export to Excel** option at the top of the page.

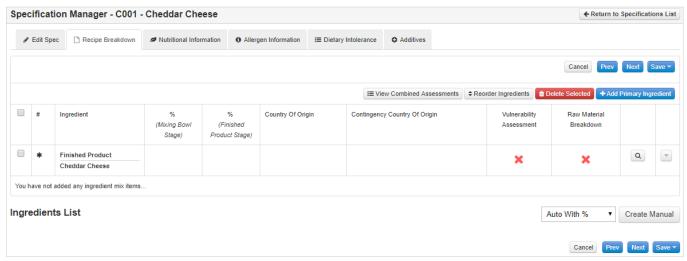


5. CREATING AND MANAGING INGREDIENT SPECIFICATIONS

5.1. CREATING AN INGREDIENT SPECIFICATION

Step 1: Follow the steps in section 3.1 to create your specification and fill in the Edit Spec tab.

Step 2: Click on the Recipe Breakdown tab, this is where you fill in your ingredient list.



*If you have set your ingredient measurement to be weight, you will see a weight column in the recipe table and a weight field to complete in the 'Add Ingredient' page instead of the %s.

Step 3: The finished product will display in the table, click on **Add Primary Ingredient** to add ingredients into the ingredient list of the product.

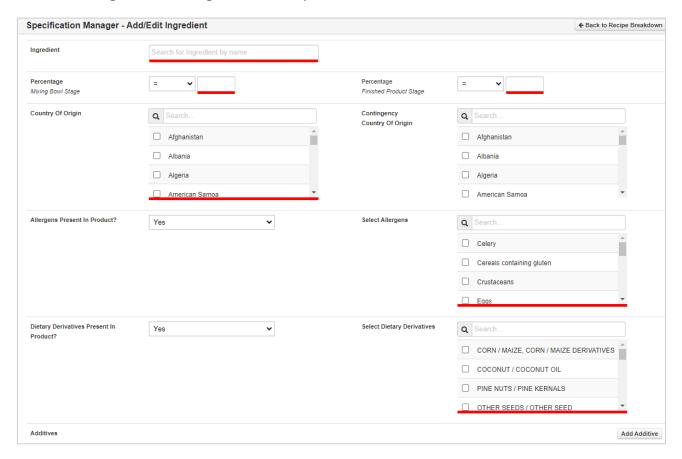
A form will open to set your ingredient information:

- Type in the ingredient name and select it from the list which appears (if you cannot find your ingredient from the database, you can add one on manually).
- Input the percentages for the mixing bowl stage and the finished product stage (or weight if weight has been selected as the measurement type).
- Select the country of origin and contingency country if applicable.
- Select which allergens are present in the product.
- Select which dietary derivatives are applicable for the product.
- If the ingredient contains additives, click on *Add Additive* and a pop-up window will open, then select and fill in the relevant information and click on *Save*.

When the ingredient information is complete, click on Save and Save & Exit which will take you back to the Recipe Breakdown tab.



*Add in all the ingredients using the same steps.



Step 4: To complete a vulnerability assessment for an ingredient, click on the dropdown arrow to the right and select **Vulnerability Assessment**.

- Select the ingredient touch points and their risk level by clicking on Select beside each
 relevant point. The selected touch points will appear to the right, reorder them by clicking on
 the arrows and dragging them into the correct position, delete points by clicking on the delete
 icon.
- Complete the vulnerability assessment form and click on Save & Exit to return to the Recipe Breakdown tab. The red X under the Vulnerability Assessment beside the ingredient will turn to a green tick once you save.



*Complete the Vulnerability Assessment for each ingredient.



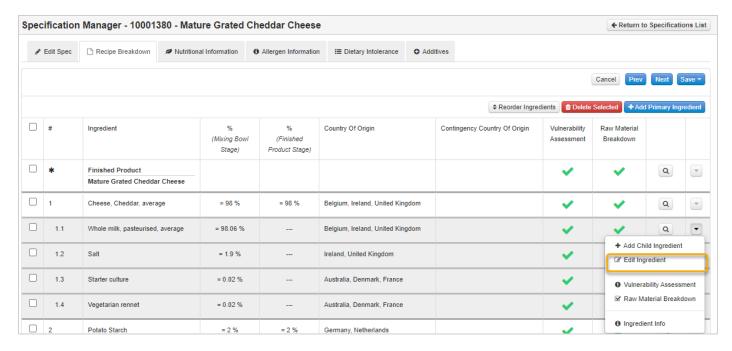
Step 5: To complete a raw material breakdown for an ingredient, click on the dropdown arrow to the right and select **Raw Material Breakdown**. Complete the raw material breakdown form and click on **Save & Exit**.

*Complete the Raw Material Breakdown for each ingredient.





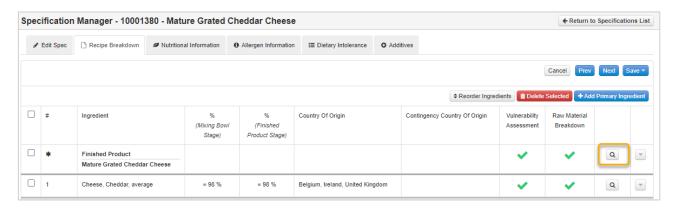
Step 6: To edit ingredient information, click on the dropdown arrow to the right and select **Edit Ingredient**; making sure to click on **Save** for any changes made.



Step 7: To delete an ingredient from the recipe breakdown, tick the checkbox beside it and click on **Delete Selected**.



Step 8: To view the information you have completed for an ingredient click on the **magnifying glass** beside the product.

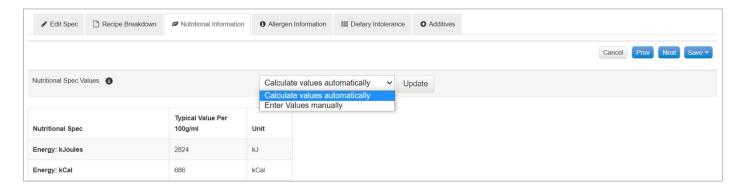




Step 9: To change the order of the ingredients in the list, click on **Reorder Ingredients**. A new page will open, click on the arrows to the left of the ingredient and drag into the correct position. When you are finished click on **Done**.

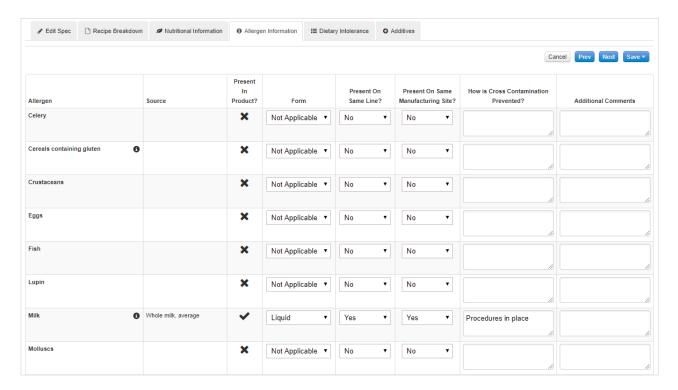


Step 10: All the ingredients added into the Recipe Breakdown will be automatically added into the Ingredient List and their nutritional values will be automatically calculated in the Nutritional Information tab. If you want to manually input your nutritional values, from the Nutritional Information tab, change the dropdown to Enter values manually and click on Update then it will open boxes to input the values manually. Remember to click on Save after making any changes.





Step 11: If you select an allergen for one of the product's ingredients, it will pull through to the Allergen Information tab and display as present in the product with the ingredient stated as the source. Click on this tab, complete the information on the allergen and click on *Save*.



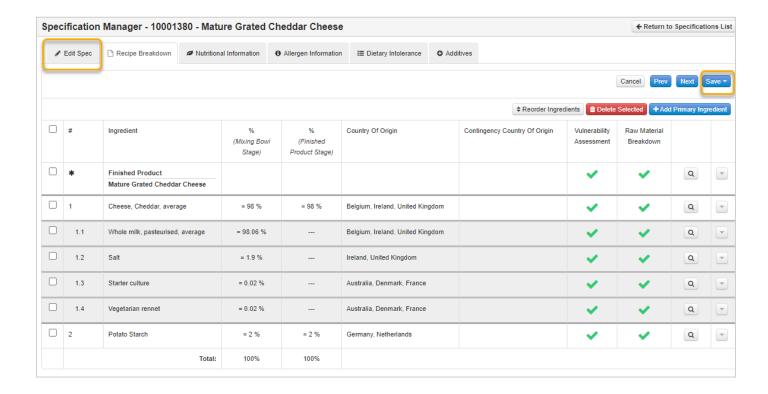
Step 12: If you select a dietary intolerance for one of the product's ingredients, it will pull through to the **Dietary Intolerance** tab and display as present in the product with the ingredient stated as the source. Click on this tab, complete the information on the dietary intolerance and click on **Save**.

Step 13: The additive information for the ingredient product will be automatically added into the **Additives** tab based on the information you have input into the recipe breakdown.



Step 14: Click on Save to save all the information that has been input into the template.

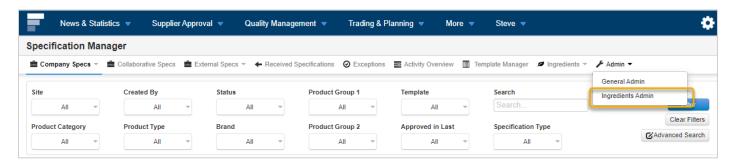
	Recipe Breakdown	Nutritional Information	Allergen Information	≡ Dietary II	ntolerance	Additives		
							Cancel Prev Next S	Save ▼
Intolerance					Present	Source	Comments	
CORN / MAIZE, CORN / MAIZE DERIVATIVES			×					
COCONUT / COCONUT OIL			×					
PINE NUTS / PINE	KERNALS				×			
OTHER SEEDS / C	OTHER SEED DERIVATIVE	S			×			
YEAST / YEAST DERIVATIVES			×					
FRUIT / FRUIT DE	RIVATIVES				×			
VEGETABLES / V	EGETABLE DERIVATIVES				×			
OTHER DAIRY / D	AIRY DERIVATIVES				~	Whole milk, average		



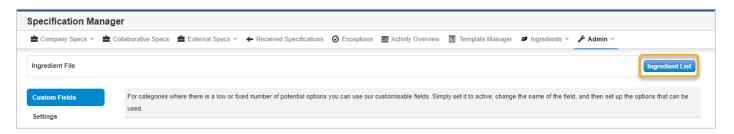


5.2. MANAGING THE INGREDIENT LIST FOR YOUR INGREDIENT SPECIFICATIONS

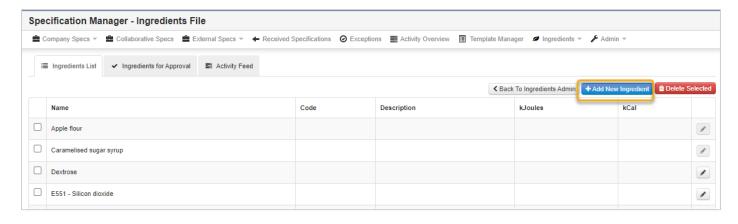
Step 1: Select **Quality Management** *tab* and select **Specification Manager** then from the **Admin** select **Ingredients Admin**.



Step 2: Click on the **Ingredient List** button at the top of the page and a page with all the ingredients from your specifications will open.



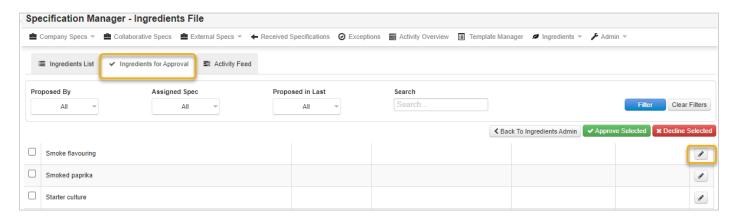
Step 3: Ingredients can be added/edited/deleted from the Ingredient List tab. If you are adding a new ingredient, you will be able to fill in details about the ingredient including nutritional values.





Step 4: If a supplier has filled in a specification and requested a new ingredient, the **Ingredients for Approval** tab is where you will find these to review.

Step 5: From the Ingredients for Approval tab, you can approve/decline/merge ingredients. You can use the merge option to merge the new ingredient with another existing ingredient from the database.



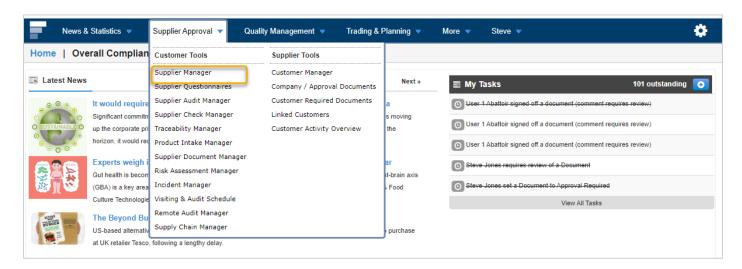
^{*}Where possible it is best to use the merge option for requested ingredients to prevent duplication of ingredients in the database*

6. SHARING AND MANAGING EXTERNAL SPECIFICATIONS

6.1. SHARING TEMPLATES AND PRODUCTS WITH A SUPPLIER OR AN AGENT

Both a specification template and the relevant products need to be shared with suppliers for them to be able to upload their specification files. Products must first be added to the product file.

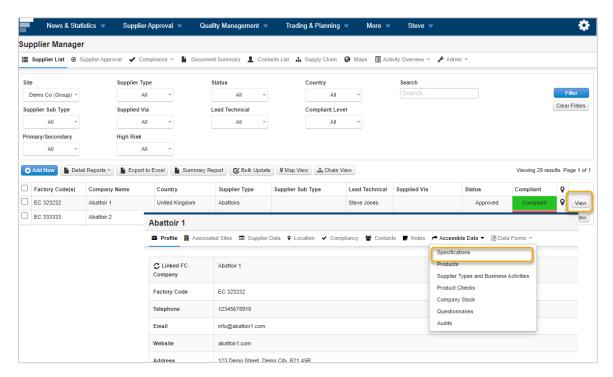
Step 1: Go to the **Suppler Approval** menu and select **Supplier Manager**, this will open your supplier list.





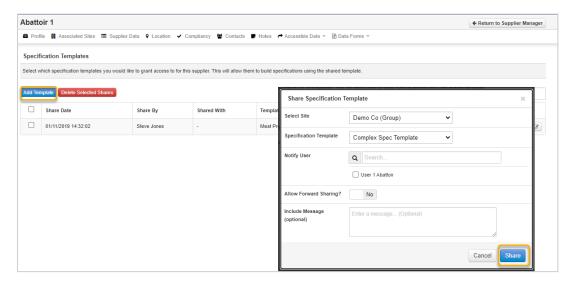
Step 2: Use the filters to find the supplier you want to share the template and products with and click on the **View** button beside their name.





Step 4: Click on Add Template and a pop-up window will open; select the site you are sharing the template for as well as the template and supplier user. You can select Allow Forward Sharing if your supplier is going to request specifications from their supplier. Click on Share and this will notify the selected user(s) of the share.

From this page, you can also edit and delete template shares.

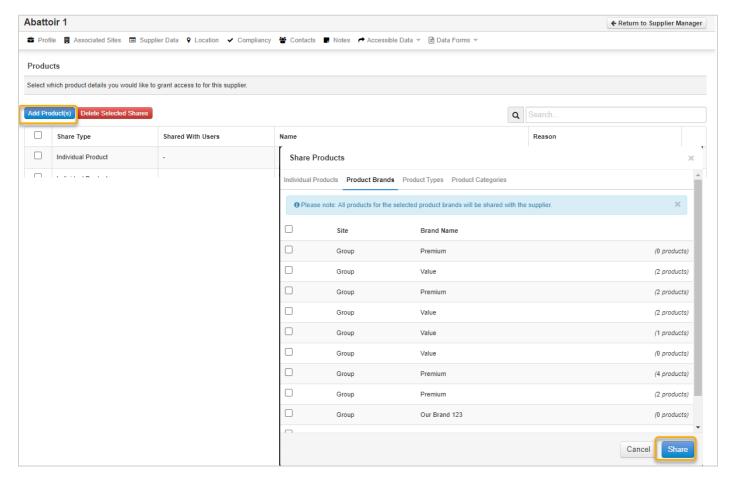




Step 5: Clicking on the **Accessible Data** section select *Products* (you will not be able to share products without first sharing a template).

Step 6: Click on **Add Product** and a pop-up window will open, select the product(s) you would like your supplier to create specifications for and click on *Share*. A second window will open to select the user, reason for sharing (build external specification) and required by date, click on *Share* again to send the request to the supplier user(s).

From this page, you can also edit and delete product shares.



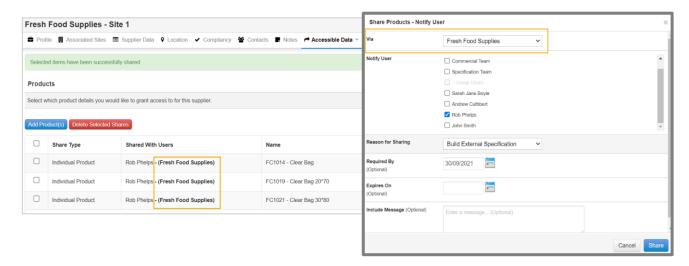
Sharing with an agent

If you have a supplier that supplies to you through an agent, you can share the template and products with the agent to complete on behalf of the supplier. Follow steps 1-4 (section 6.1) to share the template with the agent through the agent's profile; sharing once with the agent will allow them to complete specifications for multiple suppliers if applicable.

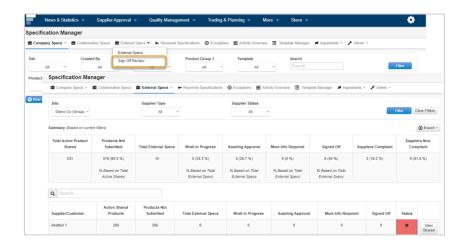
Then, you would add the products through the supplier's profile as shown in steps 5 and 6 (section 6.1). When selecting the user to notify, you will have a 'Via' dropdown to select the relevant agent which will update the notify user list to the agent's users. The list of shared products will highlight if



they have been shared with an agent in the 'Shared With Users' column. Sharing in this way will notify the agent and enable them to complete the specifications on behalf of the supplier. The completed specification will display both the manufacturer and agent name in the specification details.



Step 7: To view which products have been shared with which suppliers along with how many specifications have been created from these shared products, from the Quality Management tab, click on Specification Manager and then the Sign Off Review section under the External Specs tab.

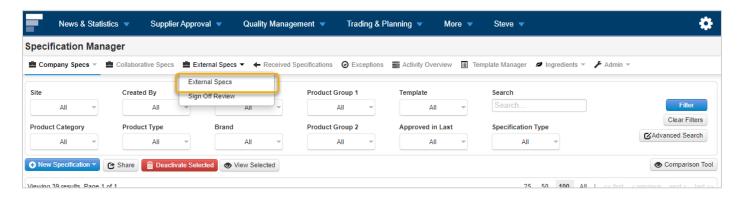




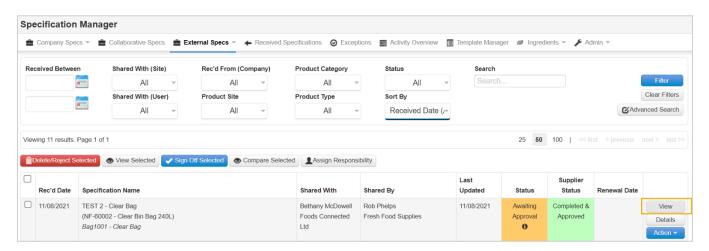
6.2. VIEWING AND SEARCHING FOR AN EXTERNAL SPECIFICATION

When a supplier fills in the specification template and sends it for sign off, you will receive an email notification and a task on your Foods Connected account.

- **Step 1:** From the **Quality Management** tab, click on **Specification Manager** and then the External Specs tab.
- Step 2: You can use the filters along the top of the page to refine your results when searching for a specification. You can use the searchbox for searching for product names/codes, alternative product names/codes and linked product information. You also have the **Advanced Search** option for a more in-depth search through all the completed specifications.

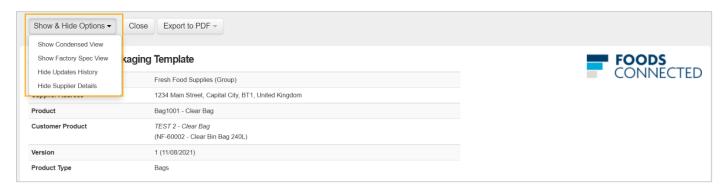


Step 3: When you have found the specification, you would like to view, click on the *View* button beside it. You can also select the **Details** button to see the details of the specification.





Step 4: When the specification opens to view, you have the option to hide information within the specification. You can select to show the condensed view according to your template setup, hide the updates history from the end of the specification or hide the supplier details from the top of the specification.

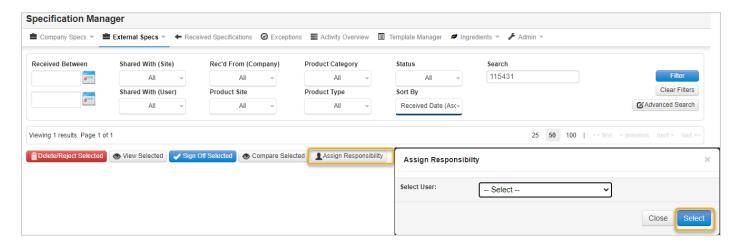


*If a linked product has been added to your specification product in the product file, it will display in brackets under the main product in the External Specs list and when viewing the specification.

6.3. RE-ASSIGNING RESPONSIBILITY FOR AN EXTERNAL SPECIFICATION

Step 1: From the **External Specs** tab, tick the checkbox beside the specification(s) you would like to reassign the 'Shared With' for and click on the **Assign Responsibility** button.

Step 2: A pop-up window will open for selecting who the new responsible person should be, click on **Select** to save the change.

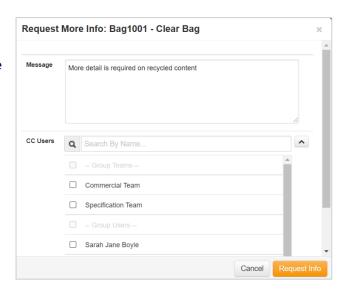




6.4. REQUESTING MORE INFORMATION ON AN EXTERNAL SPECIFICATION

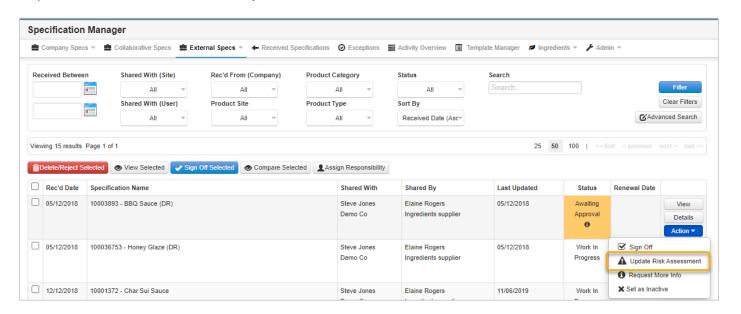
Step 1: From the External Specs tab, click on the *Action* button beside the specification you want to request more info on and select Request More Info from the list.

Step 2: A pop-up window will open for you to input the detail of your request. The request will automatically send to the supplier user who shared the completed specification but you can add users to CC into the email notification. Click on **Request Info** to send the notification to the supplier.



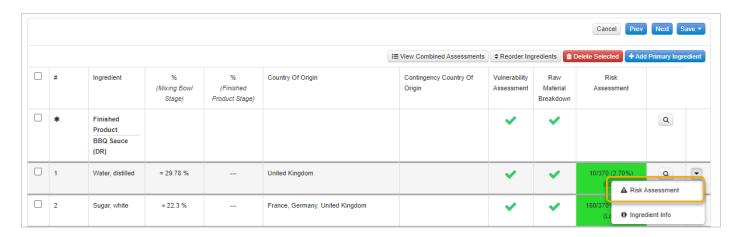
6.5. COMPLETING A RISK ASSESSMENT FOR AN EXTERNAL INGREDIENT SPECIFICATION

Step 1: From the External Specs tab, click on the Action button beside the specification you want to request more info on and select Update Risk Assessment from the list.

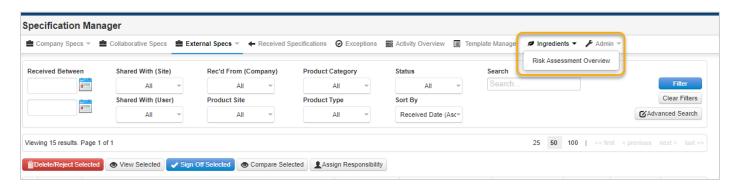




Step 2: The recipe breakdown page of the ingredient's specification will open, click on the down arrow beside each ingredient and select **Risk Assessment**.



- **Step 3:** The risk assessment template you set up in the Template Manager will open, complete the details then click on **Save & Exit**.
- **Step 4:** The ingredient's risk assessment score will now show beside each ingredient according to the criteria set in the template manager. Click on **Save** then **Save & Exit** and this will take you back to the Specification Manager.
- **Step 5:** You can view and search within all ingredient risk assessments, in the **Risk Assessment Overview** page found under the **Ingredients** tab.

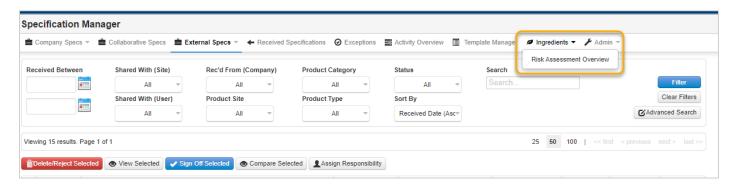




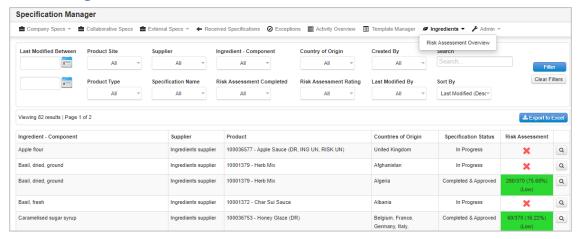
6.6. USING THE RISK ASSESSMENT OVERVIEW

The risk assessment overview show the risk assessment details of each of the components that make up your ingredient specifications.

Step 1: You can find the Risk Assessment Overview page under the Ingredients tab in the Specification Manager.



Step 2: You can find the Risk Assessment Overview page under the Ingredients tab in the Specification Manager.

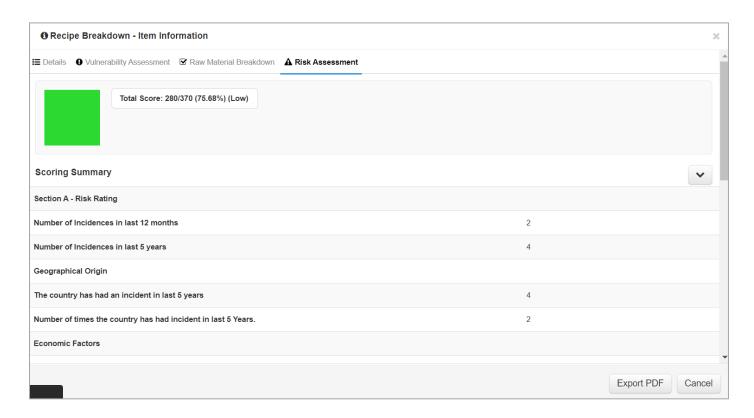


Step 3: You can use the filters to search through your ingredients and clicking on the magnifying glass beside each ingredient will show all the details that have been filled in for that component. When viewing the risk assessment information, you can use the arrow beside the **Scoring Summary** heading to expand/collapse the scoring details.

*If you have linked products set up for one of the products listed in your risk assessment overview, the linked products will show in brackets after the product name and if you can search for the linked product in the searchbox.







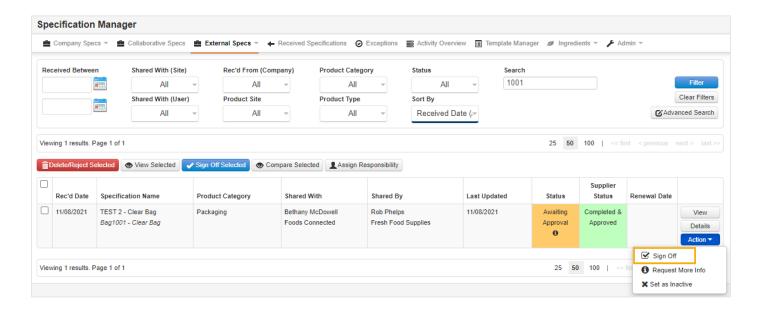
When the risk assessment has been completed it will show the score, when it is in progress it will show as an amber X and when it has not been completed it will show as a red X.

6.7. SIGNING OFF AN EXTERNAL SPECIFICATION

Step 1: From the External Specs tab, click on the Action button beside the specification you want to request more info on and select Sign Off from the list.

Step 2: A pop-up window with the product details will open, then click on **Sign Off**. The specification's status will update to **Signed Off** and the supplier will receive an email notifying them of the sign off.

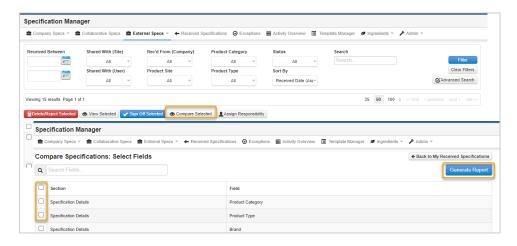




6.8. COMPARING SELECTED EXTERNAL SPECIFICATIONS

Step 1: From the **External Specs** page, tick the checkboxes of the specifications you would like to compare and click on the **Compare Selected** button underneath the filters.

Step 2: Select the specification fields you would like to compare and click on Generate Report.

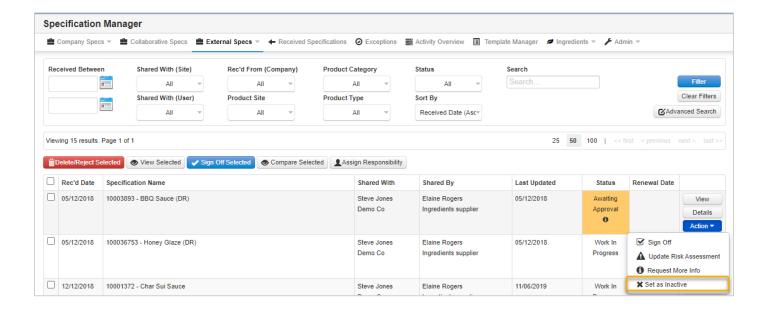


Step 3: A table will be generated pulling in the selected information, this can be exported to excel by clicking on the **Export to Excel** option at the top of the page.

6.9. SETTING AN EXTERNAL SPECIFICATION AS INACTIVE

Step 1: From the **External Specs** tab, click on the **Action** button beside the specification and select *Set as* **Inactive** from the list. This will update the status of the specification to Inactive.

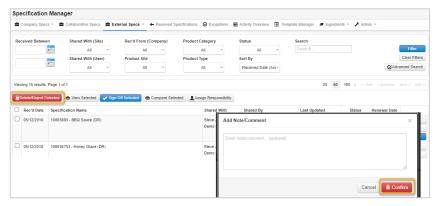




6.10. DELETING AN EXTERNAL SPECIFICATION

Step 1: From the External Specs tab, tick the checkbox beside the specification you want to delete and click on the Delete/Reject Selected button underneath the filters.

Step 2: A pop-up window will open to enter an optional comment, click on **Confirm** to delete/reject the specification.



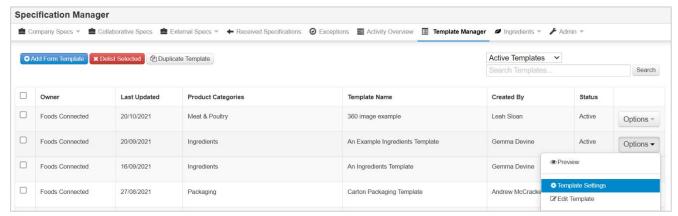
6.11. SETTING A REVIEW FREQUENCY FOR AN EXTERNAL SPECIFICATION

The renewal period for external specifications can be set at a specification template level.

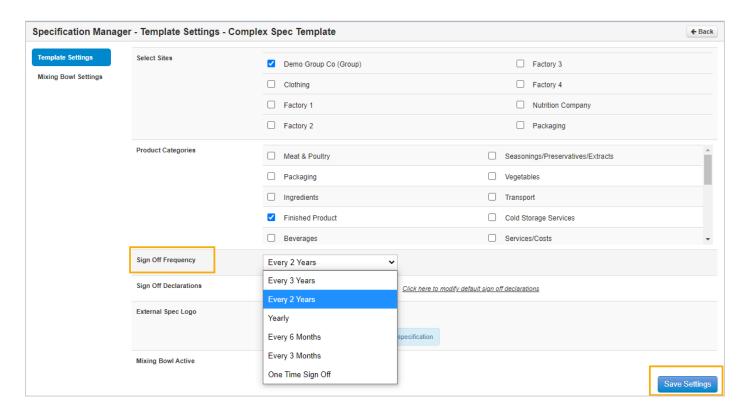
Step 1: From the Specification Manager tool, go to the Template Manager section.



Step 2: Click on the **Options** button beside the template you would like to set the review period for and select **Template Settings**.



Step 3: Select your chosen review frequency and click on Save Settings.



Step 4: This will set up the review frequency for all future completed external specs so the renewal date will calculate from the sign off date and show beside each specification.



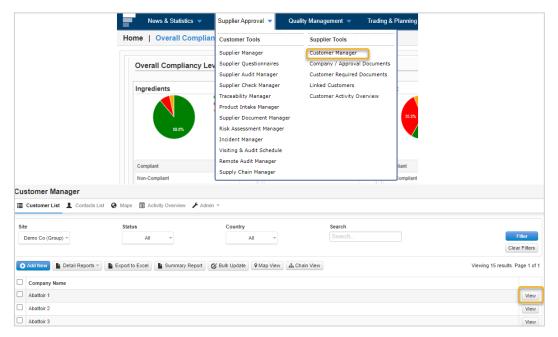


7. PROVIDING CUSTOMER ACCESS TO LINKED SPECIFICATIONS

A product/specification must first be linked to a customer to provide the customer access to view linked specifications.

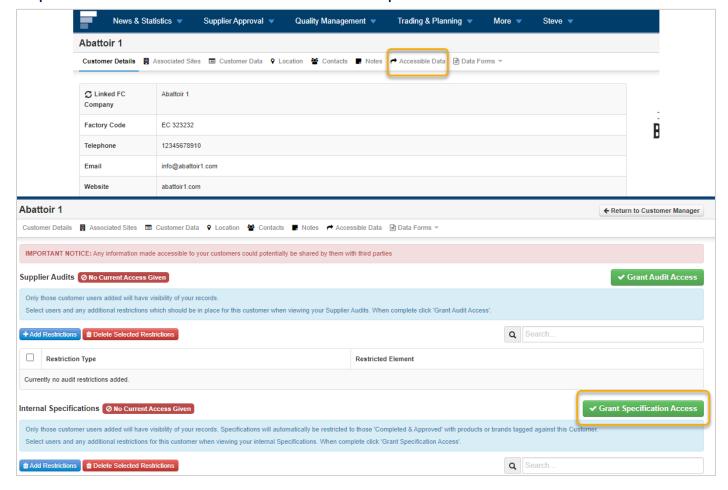
Step 1: Select Supplier Approval tab and select Customer Manager. Select the View at the required

Customer.

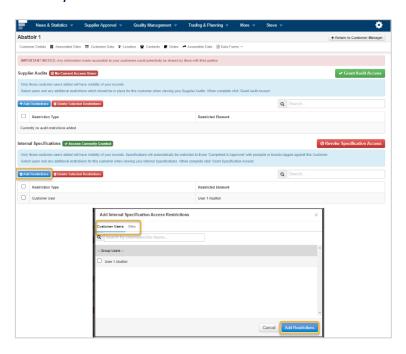




Step 2: Select Accessible data tab and select Grant Specification Access.



Step 3: To provide access to users select Add Restrictions and select Users / Sites Select Add Restrictions and select Users / Sites and select Add Restrictions

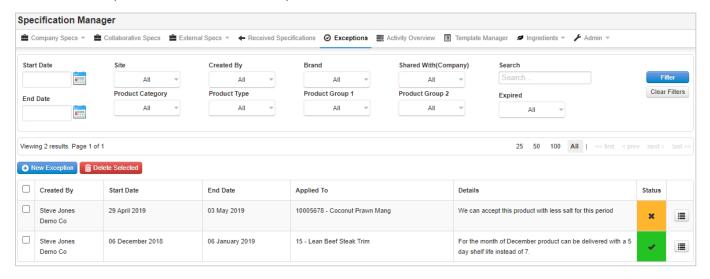




8. MANAGING SPECIFICATION EXCEPTIONS

8.1. VIEWING AND SEARCHING FOR EXCEPTIONS

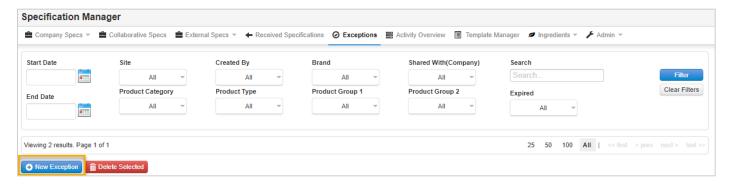
Step 1: From the **Quality Management** tab, click on **Specification Manager** and then the **Exceptions** tab. This will open a list of created exceptions.



Step 2: Use the filters at the top to refine your results and you can view the details in the table.

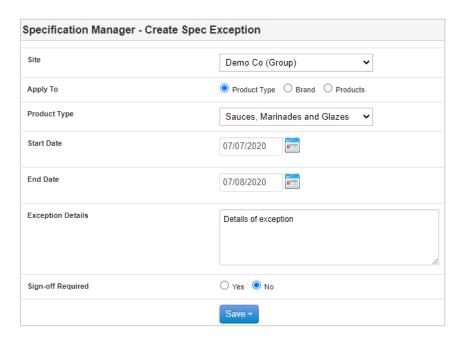
8.2. ADDING A NEW EXCEPTION

Step 1: From the **Exceptions** tab, click on **New Exception** and a form will open for the exception details.





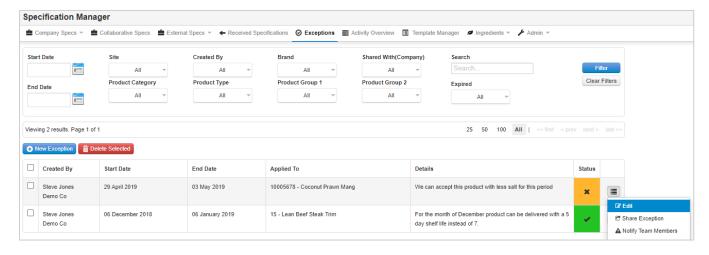
Step 2: Fill in the relevant exception details and if you want suppliers to sign off the exception select *Yes* for the **Sign-Off Required** option.



Step 3: Click on Save to save the exception.

8.3. EDITING AN EXCEPTION

Step 1: From the **Exceptions tab**, click on the menu button to the right of the exception you would like to edit and select **Edit**.

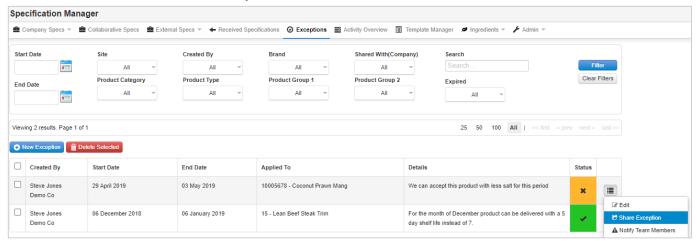


Step 2: Make the required changes and click on Save to apply these changes.



8.4. SHARING AN EXCEPTION

Step 1: From the Exceptions tab, click on the menu button to the right of the exception you would like to share and select Share Exception.



Step 2: A list of your **Suppliers/Customers** will open, select who you would like to share with and click on **Next**.



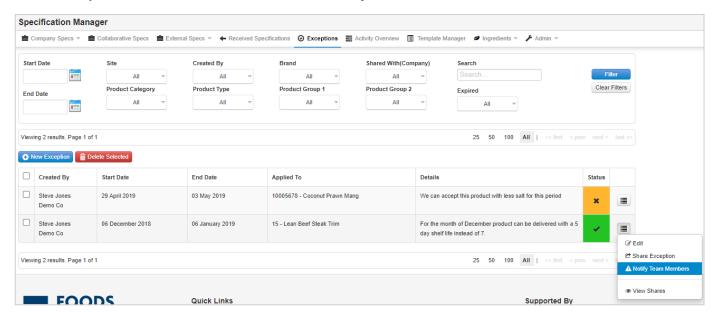
Step 3: Select the supplier you would like to notify about the exception and click on Send.

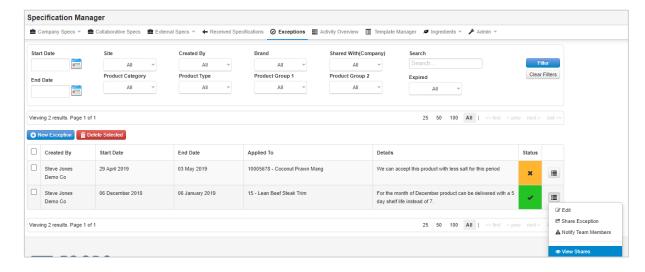
Step 4: You can view who an exception has been shared with by clicking on the menu button to the right of the exception you would like to view the shares and select **View Shares**. This will open a popup window with details of the shares.



8.5. NOTIFYING TEAM MEMBERS ABOUT AN EXCEPTION

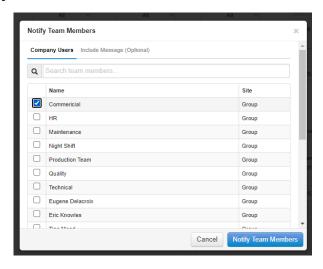
Step 1: From the Exceptions tab, click on the menu button to the right of the exception you would like to notify team members about and select Notify Team Members.





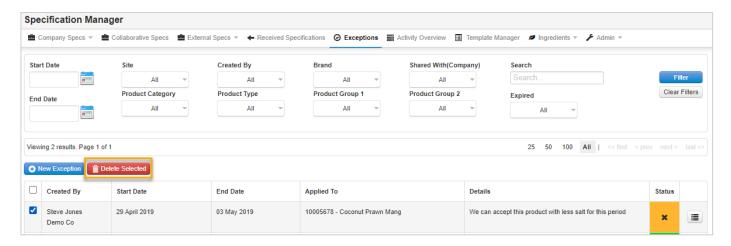


Step 2: This will open a pop-up window for you to select the required user(s) and input an optional message. Click on **Notify Team Members** to send the notification.



8.6. DELETING AN EXCEPTION

Step 1: From the **Exceptions** tab, tick the checkbox beside the exception you would like to delete and click on the **Delete Selected** button underneath the filters.

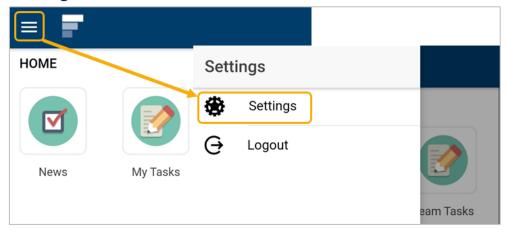




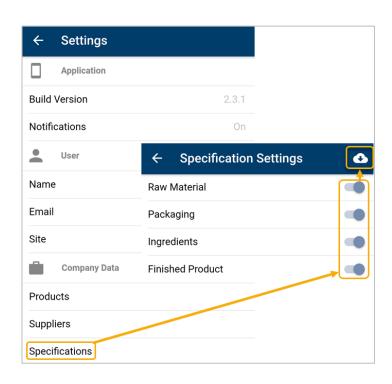
9. VIEWING SPECIFICATIONS ON THE APP

Specifications with a status of Completed and Approved can be viewed on the Foods Connected app.

Step 1: Log into the Foods Connected app, tap on the three lines at the top left-hand corner of the page and select **Settings**.

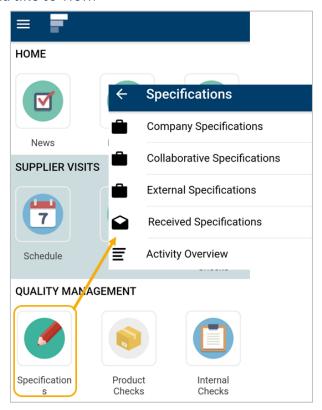


Step 2: Select the **Specifications** page and switch on the product types that you would like to download the specifications for. Tap on the cloud icon to download the specifications onto the app.

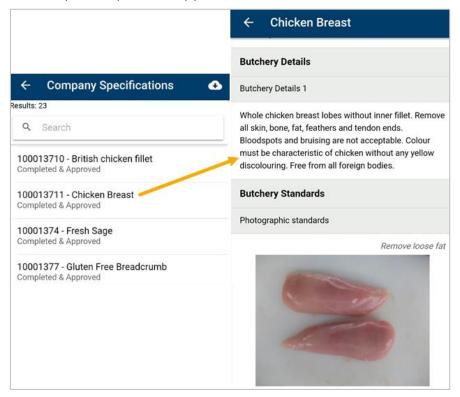




Step 3: Return to the app homepage and go to the **Specifications** page, here you can select which specification type you would like to view.



Step 4: The full list of Completed and Approved specifications will show, you can search for the one you need and tap on it to open it up on the app.





Step 5: When changes are made to your specification list, you can refresh the list by tapping on the cloud icon in the **Specifications** or **Settings** pages.

