TOOL USER GUIDE

SUPPLY CHAIN MANAGER

CONTENTS

1. TOOL INTRODUCTION

Supply Chain Manager is a tool that allows Customers to map out their Supply chain from a start to end path point depending on the visibility required. For example, map supply chains from processor back to farm or raw material supplier. The tool can give customers the visibility of Supply chains at product level or sub-category level for example. The tool is customisable depending on the customer requirements. The Supply Chain Mapping tool links with the Supplier Manager Tool on Foods Connected, meaning suppliers must be in Supplier Manager and categorised correctly before they can be mapped in the Supply Chain Mapping tool.

The Supply Chain Manager tool can also link to Document Request Manager highlighting specific path points within a supply chain to help with management of Documentation or due diligence.

Supply Chains can be mapped by the customer or alternatively Supply Chain templates can be shared with suppliers to complete. If the latter is applicable, please note only 1 user (usually the end path point supplier, e.g Direct supplier to retailer) would complete the full Supply Chain where the customer has full visibility.

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2. CREATING A SUPPLY CHAIN TEMPLATE

Step 1: Sign in and go to the *Supply Chain Manager* Tool under Supplier Approval and select *New Templates*
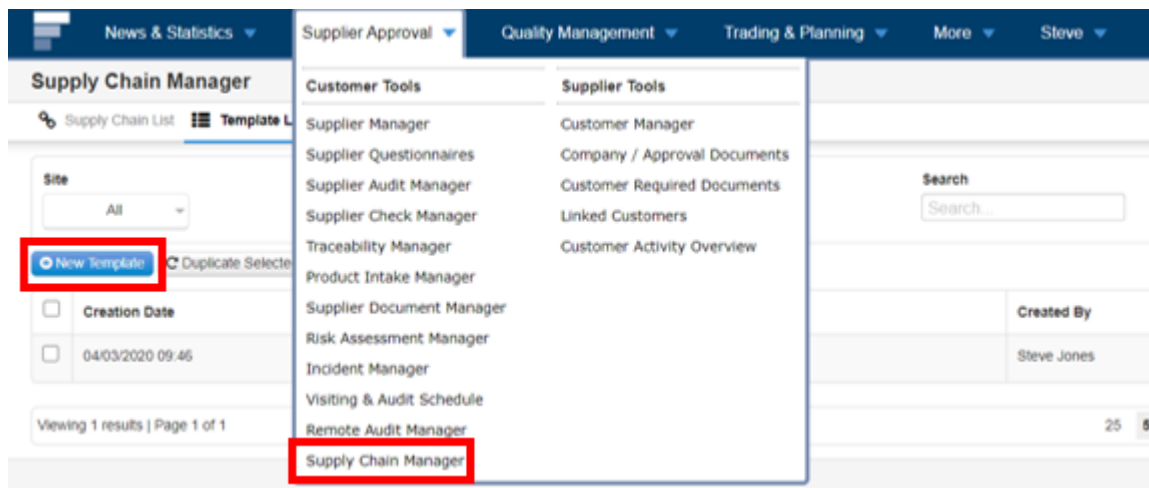
1.1 SETUP DETAILS OF THE TEMPLATE

Step 1: Complete the details for the template.

Step 2: Save the template and start editing the supplier path points or exit the template.
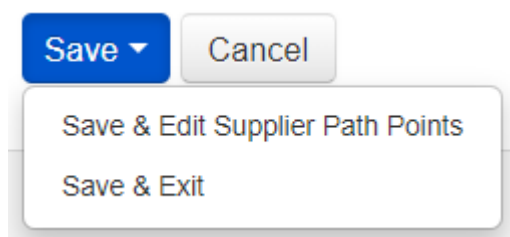
1.2 CREATING / EDITING SUPPLY CHAIN TEMPLATE (CUSTOMER ADMIN USERS ONLY)

Step 1: Select *Add New Point* to start creating supplier path points. Examples of path points include: processor, slaughter site, packing site, agent, storage, raw material supplier, farm

Supply Chain Manager - Edit Supply Chain Template			← Back to Templates
✎ Details ▯ Supplier Path Points			
⊕ Add New Point			⇳ Reorder Points
Supplier Path Point		**Filters**	**Required**
There are no path points set up...			

Step 2: Complete the detail for the supplier path point and select *Save Details.* Continue this process for all the supplier path points until complete.

NB. Selecting the supplier type and supplier sub type will limit the suppliers available in the supply chain to the suppliers categorised as the selected from supplier manager.

Supply Chain Manager - Beef Supply Chain - Create Supplier Path Point		
Supplier Path Point Name	Slaughter House	**Name the path point**
Previous Path Point	Farm ⌄	**Select the previous path point to ensure the path point is placed in the correct order.**
Required	Yes ❶ Left most path points will always be required regardless of this setting	**Select if this path point is mandatory to be completed by the supplier**
▣ Categorisation		
Supplier Type	Abattoirs ⌄	**Select the Supplier Type & Sub Type the path point relates to.**
Supplier Sub Type	☑ Beef ☐ Lamb ☐ Chicken	
Primary/Secondary	2nd ⌄	**The optional dropdowns that are set up in your supplier manager will appear in the path points. Select the relevant criteria if relevant.**
High Risk	No ⌄	
	Save Details Cancel	

Step 3: Path points can be re-ordered by selecting the *reorder points* button and dragging the path points to the correct order. Once in the correct order press *Done*.

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Supply Chain Manager - Edit Supply Chain Template

← Back to Templates

Details | Supplier Path Points

⊕ Add New Point

⇕ Reorder Points

Supplier Path Point	Filters	Required		
Farm	Supplier Type: Farm	No		
Slaughter House	Supplier Type: Abattoirs Supplier Sub Type: Beef	Yes		

Step 4: Completed path points can be edited or deleted by selecting the edit icon or delete button on the right of the path point. Please note templates cannot be amended if there are active supply chain maps completed against that template.

Supply Chain Manager - Edit Supply Chain Template

← Back to Templates

Details | Supplier Path Points

⊕ Add New Point

⇕ Reorder Points

Supplier Path Point	Filters	Required		
Farm	Supplier Type: Farm	No		
Slaughter House	Supplier Type: Abattoirs Supplier Sub Type: Beef	Yes		

Step 5: Select the *Details* tab and change the status of the template to *In Use* and select *Save & Exit*.

Step 6: Preview the template selection by clicking the icon button and selecting *Preview*

Supply Chain Manager - Edit Supply Chain Template

Details | Supplier Path Points

Template Name	Beef Supply Chain
Sites	☑ Demo Co (Group)
	☐ Factory 1
	☐ Factory 2
	☐ Factory 3
Status	In Use ⌄

Save ▾   Cancel

Save & Edit Supplier Path Points

Save & Exit

Supplier Selection. This allows you to view what the user completing the supply chain will see and to ensure the correct suppliers fall into the correct path points.

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If the path points are empty or the wrong suppliers are in the path point, then you need to edit the path point and select the corresponding filters for the relevant suppliers or review how the suppliers are categorised in Supplier manager.

2. GENERATING/ SHARING & RECALLING THE TEMPLATE (CUSTOMER ADMIN USERS ONLY)

The template can be completed by sharing it to a supplier (external) or by generating the template and the customer completing the template (Internal).

2.1 INTERNAL GENERATE & EDIT

Step 1: Select the *Supply Chain List* tab and click on *New Supply Chain* button. This will give you two options, select the *Generate & Edit* option.

Step 2: From the pop-up modal select the supply chain template you want to complete and for the relevant site and select *Generate & Edit.*

Please follow the steps in '3. Completing the Supply Chain' on how to complete the supply chain.

2.2 EXTERNAL GENERATE & SHARE

Step 1: Select the *Supply Chain List* tab and click on *New Supply Chain* button. This will give you two options, select the *Generate & Share* option

Step 2: From the pop-up modal select the relevant supply chain template and click *Generate & Share.*

Step 3: Select the supplier(s) you want to share the supply chain with and press *Next Step* button.

Step 4: Complete the details for sending to the supplier(s) and press *Send to Recipients*

Sites to Generate Supply Chains For	Demo Co (Group)
Restrict to 'Supplied Via' this Supplier	Yes
Message to include with email (optional)	Enter a message...

This allows you to limit the visibility of suppliers in the path points to only the suppliers of the company you are sharing the template with. *NB. for this to work you need to set the company up as a 'via' for the suppliers in supplier manager.*

Supplier Name	Supplier Contact Name
Abattoir 1	User 1 Abattoir
Abattoir 2	-- Select --

Select the user you want to notify.
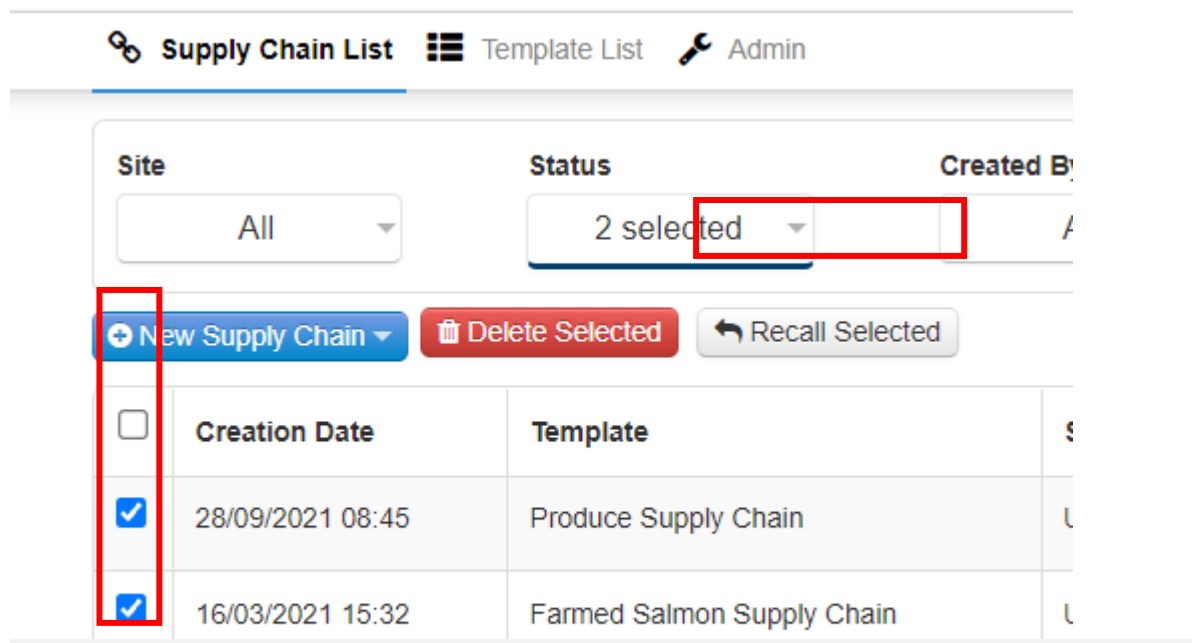
< Previous Step   Send to Recipients

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2.3 RECALLING SHARED TEMPLATES

Supply Chains can be recalled for Supply Chain Templates in Status 'Not Started'.

Step 1: Select the *Supply Chain List* tab, select the tick box for those supply chains that you would like to recall, once selected click on the Recall Selected Button.

Step 2: A pop up will appear for confirmation of recalling the selected templates. Select OK to confirm or cancel to cancel request.
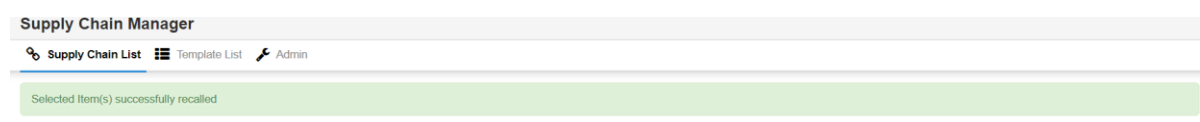
Step 3: A pop up will appear to confirm the recall has been successful.

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3. COMPLETING THE SUPPLY CHAIN

3.1 COMPLETING SUPPLY CHAIN MAPS

Step 1: Sign in and go to the *Received Supply Chains* Tool under Supplier Approval.
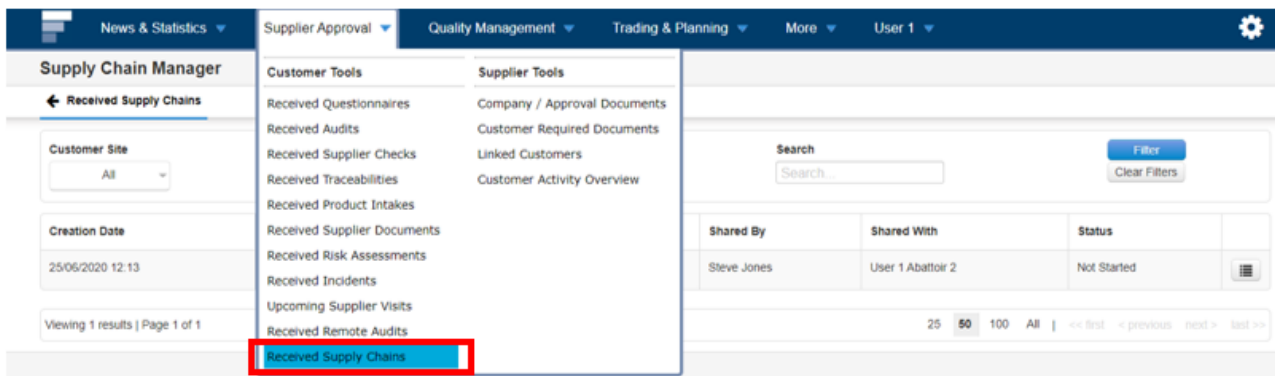
Step 2: Click on the icon button against the shared supply chain and select *Edit Supply Chain Details.*

Filters are available to allow you to find specific supply chain templates by the customer, the status of the template and who shared the template. You can also search the name of the template.
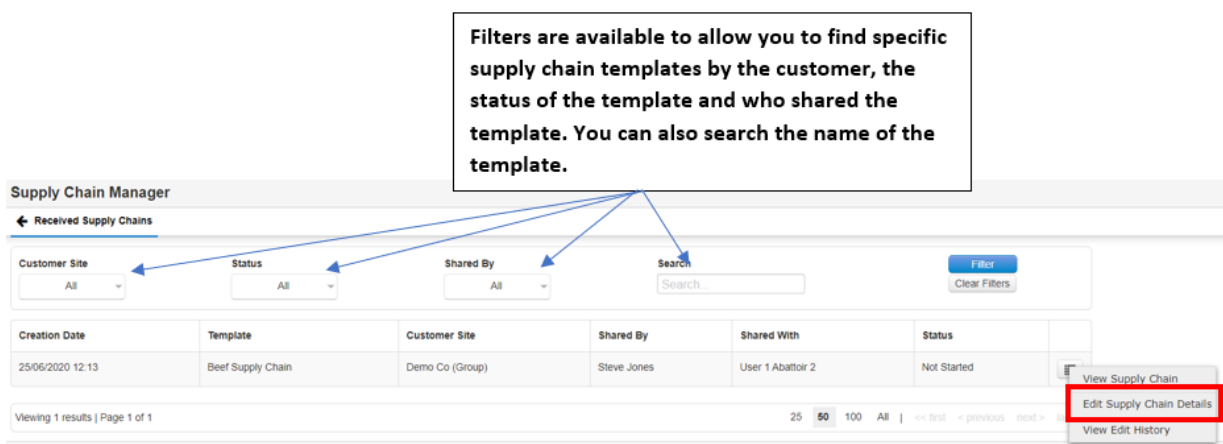
Step 3: Complete the supply chains per supplier(s) by highlighting the suppliers in the relevant chain and pressing the *Add Supply Chain Path.* This will create the supply chain for that supplier in a table.

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When you start the supply chain the status of the template changes to in progress.

Select the suppliers per path point that relates to that supply chain.

Filter button filters out the suppliers you have already created a supply chain for.

Once you add the supply chain path it appears in the table.

Step 4: Editing or deleting supply chains can be completed by selecting the icons on the right

Once all the suppliers in the first path point are selected then the supply chain process is completed and the status changes to completed on both the suppliers and customers end.

4. VIEWING & EXPORTING COMPLETED SUPPLY CHAINS

The supply chain process is live which means the customer can view your progress at any time.

Step 1: In *Supply Chain List* tab select the icon button beside the relevant supply chain template and select *View Supply Chain.*

Step 2: All the chains are available to view in table format. You can search for a specific supplier to show all different chains they belong to.

Step 3: Supply chains can be exported to PDF or Excel by selecting the Export Button.

Step 4: All activity on the supply chain template is recorded in the Edit History. Click on the icon button and select *View Edit History.*

5. EXTRACTING PATH POINTS INTO SUPPLIER MANAGER (CUSTOMER ADMIN USERS ONLY)

You have the ability to extract certain path points columns from specific templates and input this into Supplier Manager for Supplier Lists, Compliance Summary, Document Summary and Customer Required Documents per supplier.
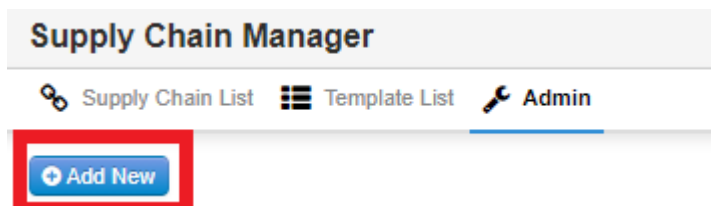
Step 1: In *Supply Chain Manager* select the *Admin tab.*

Supply Chain Manager

| Supply Chain List | Template List | Admin |

| Site | Status | Created By | Search | Filter |
| | All | All | | Clear Filters |

New Template   Duplicate Selected   Delete Selected

	Creation Date	Template	Created By	Status	
☐	24/08/2020 16:05	Berry - Gooseberries		In Use	☰

Step 2: Select *Add New*

Supply Chain Manager

Supply Chain List   Template List   Admin

Add New

Step 3: Complete the extraction setup and press save

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Supply Chain Manager - Edit Supply Chain Template Tool Share

Name	Enter a name...

Fill in the name of the extraction

Template
- ☑ Berry - Strawberries
- ☐ Vegetables - Cauliflower
- ☐ Vegetables - Broccoli
- ☐ Vegetables - Cabbage
- ☐ Vegetables - Brussels Sprouts

Select the template you want to pull the path point from. You can select more than 1 template.

Point(s)
- --Berry - Strawberries--
- ☐ Grower
- ☐ Packhouse Tier 2
- ☐ In Country PMO
- ☐ Packhouse Tier 1

Select the path point you want to extract from that template(s). You need to select a path point per template.

Available In
- ☐ Supplier List
- ☐ Document Summary
- ☐ Compliance Summary
- ☐ Customer Required Documents

Select where you want the extraction to be visible

Enable Filter   ○ No   ● Yes

Combine Points   ● No   ○ Yes

[Save ▾] [Cancel]

Select if you want to enable filters within Supplier Manager for the extraction path point

path point was selected. This means all the path points are combined into one column.

6. EDITING COMPLETED SUPPLY CHAINS

Supply Chain Manager has the functionality to edit completed supply chains. Supply chains can be updated individual 'Singular' or by bulk update.

Step 1: Navigate to the Supply Chain Template that requires editing by following Section 3 Step 1 &2.

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Step 2: Scroll down to the completed Supply Chain that requires editing and select the 'Edit Supply Chain Path' Button.

7. BULK UPDATING COMPLETED SUPPLY CHAINS

Supply Chain Manager has the functionality to Bulk edit and update completed supply chains.

Step 1: Navigate to the Supply Chain Template that requires editing by following Section 3 Step 1 &2.

Step 2: Select Bulk Update Supply Chain Maps

Step 3: The Bulk Update Supply Chain Map display will appear, select the path points you wish to bulk update by ticking the tick box. Singular path points or multiple can be updated depending on requirements.

Step 4: Select the Current Supplier that you would like to Replace and bulk update from the drop down and then select the New Supplier you would like to bulk update the current with.

Bulk Update Supply Chain Maps   ✕

Please select path point name from path points and suppliers below to bulk update supply chain map paths. **Note: If a new supplier selected is not available in the selected path point option, the supplier for that path point will not change.**

Path Points

- ☑ Point 1
- ☑ Point 2
- ☑ Point 3
- ☑ Point 3
- ☑ Point 4

Current Supplier   Demo Company 1 ⌄

New Supplier   QA TEST - 15/09 ⌄

Cancel   **Save**

Step 5: Select Save. The pop will appear to confirm you wish to update, select ok to confirm or cancel. Upon Save all current points will be updated with New Supplier

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Are you sure you want to update path points for all selected paths?

OK   Cancel

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