TOOL USER GUIDE

—

SUPPLIER QUESTIONNAIRES

CONTENTS

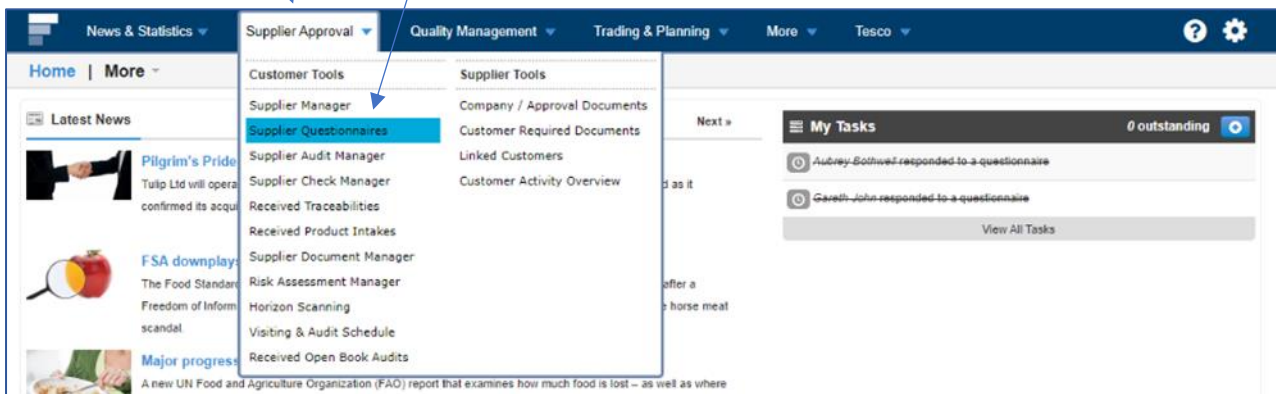**FOODS CONNECTED**

1. CREATING QUESTIONNAIRE TEMPLATES

1.1 WHERE TO FIND QUESTIONNAIRE MANAGER

Step 1: Log onto your Foods Connected Account

Click <u>Supplier Approval</u>, then <u>Received/Supplier Questionnaires</u>

1.2 ADDING A NEW QUESTIONNAIRE TEMPLATE

Step 1: Sign in go to the Supplier Approval tab > *Questionnaire Manager* > *Admin*

Questionnaire Manager

Company Questionnaires ← Received Questionnaires ☰ Activity Overview ▤ Reports ▾ 🔧 **Admin**

Currently viewing **ALL SITES - ALL CATEGORIES** Questionnaires | Change Filters   Viewing 13 results | Page 1 of 1

⊕ Add New   C Duplicate Selected   🗑 Delete Selected

	Last Modified	Title	Created By	Review Frequency	Type	In Use	Status	
☐	22/04/2020 13:27:52	Demo Co New Supplier Questionnaire (DR, S, Tri, Pag)	Steve Jones	1 Year	SAQ	Yes	50 Sent	☰
☐	17/04/2020 14:29:27	SAQ Sustainability	Steve Jones	1 Year	Sustainability	No	0 Sent	☰
☐	17/04/2020 14:18:12	Supplier Sustainability Questionnaire	Steve Jones	1 Year	Sustainability	Yes	2 Sent	☰
☐	23/03/2020 17:08:46	Goods In	Steve Jones		Technical	Yes	1 Sent	☰
☐	07/02/2020 11:26:37	Gluten Free Allergen Questionnaire	Steve Jones	1 Year	Technical	Yes	2 Sent	☰
☐	19/12/2019 09:48:10	Supplier Volumes	Steve Jones	1 Month	Commercial	Yes	0 Sent	☰
☐	19/12/2019 08:05:08	Supplier Pesticides Usage	Steve Jones	1 Year	Technical	Yes	0 Sent	☰
☐	17/06/2019 14:22:11	Supplier Performance Evaluation	Steve Jones	1 Year	Commercial	Yes	3 Sent	☰
☐	04/02/2019 12:00:44	Agent/Broker Details questionnaire (DR, S,Tri, Freq)	Steve Jones	1 Year	Technical	Yes	0 Sent	☰
☐	28/01/2019 21:13:58	Services Questionnaire (Ex/Col)	Steve Jones	1 Year	Financial	Yes	3 Sent	☰
☐	21/11/2018 12:26:59	Meat Vulnerability Questionnaire	Steve Jones	1 Year	Financial	Yes	1 Sent	☰
☐	21/11/2018 12:26:29	Packaging Supplier Vulnerability Questionnaire	Steve Jones	1 Year	Financial	Yes	0 Sent	☰
☐	21/11/2018 12:26:09	Cold Store Questionnaire	Steve Jones	1 Year	Financial	Yes	2 Sent	☰

25 **50** 100 | << first < previous   next > last >>

Step 2: Select *Questionnaire Types*

Questionnaire Manager

Company Questionnaires ← Received Questionnaires ☰ Activity Overview ▤ Reports ▾ 🔧 Admin

Preset Fields   Add / Update Questionnaire Types

Export To PDF

Questionnaire Types   Add / Update Types   🗑 Delete Selected

	Questionnaire Type Name
☐	Financial
☐	SAQ
☐	Commercial
☐	Technical
☐	Sustainability

Step 3: Select *Add/Update Questionnaire Types.* Create your questionnaire types and select *Add/Update*

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1.3 CREATING / EDITING A QUESTIONNAIRE TEMPLATE

Step 1: Select *Add new*

Step 2: Now you are on the setup details of that specific questionnaire**.**

Step 3: Once complete select **Save & edit Questionnaire or Save & Exit if not building the questionnaire yet.**

1.3.1 AUTO SHARE SCHEDULE

This stage can only be completed when the details of a questionnaire have been set up and saved.

Step 1: Click the **Action** button beside the required questionnaire in the Company Questionnaires section of Questionnaire Manager, then select **Edit Details**

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Step 2: Click **Auto Share Schedule**

	News & Statistics ▼	Supplier Approval ▼	Quality Management ▼	Trading & Planning ▼	More ▼

Questionnaire Manager - Edit Questionnaire

✎ Setup	🗒 Preset Company Details	⊙ Auto Share Schedule

Step 3: Complete the details:

Questionnaire Manager - Edit Questionnaire   ← Back

✎ Setup	🗒 Preset Company Details	⊙ Auto Share Schedule

Schedule Name   [Enter a schedule name...]   **Enter the Schedule Name**

Description   [Enter a Description (Optional)...]

Frequency   ○ Daily ○ Weekly ● Monthly ○ Quarterly   **Select the frequency**

Start Date   [Start Date]

End Date   [End Date]   **Choose a start and end date**

Schedule Dates

Select Sections   ALL sections are selected   [＋ Select specific sections to share]   **Choose specific sections to share if necessary**

Supplier Type	Supplier Sub type	Status	Supplied Via	
All ▼	All ▼	All ▼	All ▼	Filter / Clear Filters

	Supplier/Customer	Supplier Name	Supplier Type
☐	Supplier	COOK	Test
☐	Supplier	COOK - Production Site	Test
☐	Supplier	CPF - Demo 1	Meat
☐	Supplier	Demo Company 1	Ingredients
☐	Customer	Demo Customer	---
☐	Supplier	Demo Customer	Ingredients
☐	Supplier	Foods Connected	Test
☐	Supplier	Fresh Food Supplies	Seafood

Select a specific supplier/suppliers or select all using the filters if necessary

Step 4: Click **Confirm Suppliers**

	Supplier	Test Supplier11	Meat
☐	Supplier	Test Supplier111	Meat
☐	Supplier	WalkMe	Meat

Cancel   Confirm Suppliers

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Step 5: Complete the **Contact Name** and **CC in users** (if necessary)

Step 6: Once happy with the **Contact Names**, click Generate Schedule

The schedule will appear as shown below.

If required, use the **Action button** to **edit** the schedule or **delete** the schedule.

1.3.2 BUILDING THE QUESTIONNAIRE FORM

Step 1: Build your questionnaire using the form builder to suit your needs. To add a new section select *Add New Section*.

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Step 2: Add your section name and any intro text and then select *Add Section*

New Section looks like this below

Step 3: To add a new field or question select *Add New – Standard Field*

Step 4: Now add in the details of the question & how you want it answered using the field types.

Add New Field

Field Label	What is the question?	Show	**Enter your question here**
Section	New section ▾	
Field Type	Standard Dropdown - Single ◂	**Choose the field type or way to answer question**
Options	↕ Yes	☑ ✖
	↕ No	**Choose the answers or options for the question**
		Add
Help Text	Guide your users with help text	**Help text is good to guide the user**
Help Image	Choose file No file chosen	
Required	ⓘ ◉ N ◯ Always ◯ Condition Based	**Select if this question is required to be answered by the user**
Visible	ⓘ ◉ Always ◯ Condition Based	

Cancel   Add

Select if this question is conditionally based on the answer of another question.

Select if this questions visibility on the check is conditionally based on the answer of another question.

ADDING A HELP FILE TO QUESTIONNAIRES

Sometimes a help file may be beneficial for example in attaching a contract or criteria information.

This can be done by following steps 6 and 7 (above) then scroll down the Field Type list and select Help File. Then click Choose File and upload your required document.

Field Type	-- Please Select -- ▾		Field Type	Help File - provide a file that ▾
Help Text				
	Checkbox Grid		File	Choose file No file chosen
	Completion Aids			
	Comment - sub heading to provide the user with information			
Help Image	Internal Field Reference - display value of another field within the form			
	Help File - provide a file that the user can download for more information			
Required	**Prepopulated Options**			

Then follow the rest of the steps below

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Step 5: Once done select *Add Field*

New Field looks like this below

Step 6: To be able to use Scoring on the questionnaire repeat the same steps up to **Step 7** but in the **Field, Type** choose a weighted dropdown. Add in the answer and the points that the answer is worth and select *Add*

Update Field   ×

Field Label	What is the question?	Show

Section   New section ▼

Field Type   Weighted Dropdown - ▼

Weighted Options   Yes   5   Add

Help Text   Text is here to help you.

Help Image   Choose file No file chosen

Required   ❶   ⦿ No   ◯ Always   ◯ Condition Based

Visible   ❶   ⦿ Always   ◯ Condition Based

Show in Completed Table   ❶   No

Delete Field   Cancel   Update Field

Step 7: Repeat steps to build up your check using the various field types available to you.

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1.4 ADDING EXTERNAL FIELDS

When adding an external field please follow steps in section 1.3 to navigate to the questionnaire editing sections. Please follow the steps when in Editing Questionnaire Section.

Step 1: Find Questionnaire you wish to edit and select *Edit Questionnaire*

Step 2: Select *Add New* and then *External Field*

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Step 3: Enter in the Information – where the field is that you want to pull through

What section in your questionnaire do you want the external field to pull into

Enter details for the External Field below. When you are finished click the 'Add Field' button to return to the Form.

Section	Investment Details Outlined
Field Label		Show
Tool	Questionnaire Manager
Form Type	Questionnaire
Template	Cost of Production Lamb - Baselir ▾
External Field	Enterprise Turnover - Livestock Enterprises for the Year - Sheep Enterprise Flock 1 - Ex ▾

○ Minimum Value ○ Maximum Value ○ Average Value ○ Sum Of Values

Is it a Questionnaire/Audit/Risk Assessment /Supplier Check you are retrieving information from

Is it a Questionnaire or Confirmation Form you are retrieving from

Select the questionnaire/template you are pulling the field from

Select the field you want to pull in (The figure or information needed

Cancel   Add Field

Step 4: Select *Add Field*

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1.5 ADDING ISSUE TRIGGERS TO THE QUESTIONNAIRE

Email alerts are a feature which allow you to create a trigger when a certain answer is given to a question. This will then send an email to someone to notify them of the answer to the question.

Step 1: As you progress you can create *Email Alerts* from the answers that have been chosen. To do this select *Triggers* & *Email Alerts.*

Step 2: Now select *Add Alert*

Step 3: Now setup your alert. If someone answers a question a certain way that answer will trigger an alert to a user.

Step 4: Select from *Field* the question

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Step 5: Then select the answer from *Field Option* that will raise the trigger/alert

Questionnaire Manager - New questionnaire - Email Alerts	← Back to List

Field	New section - What is the question? ▼	
Field Option	Yes ▼	
Recipients	-- Please Select -- ▼	Add to list
	Technical ✖	

Cancel   Save

Step 6: Now add the user or team from *Recipients* that will receive the notification and select *Add to list*. Once done select *Save.*

Questionnaire Manager - New questionnaire - Email Alerts	← Back to List

Field	New section - What is the question? ▼	
Field Option	Yes ▼	
Recipients	-- Please Select -- ▼	Add to list
	Technical ✖	

Cancel   Save

Trigger setup will look like this below

Questionnaire Manager - Update Form - New questionnaire - Email Alerts	← Back

To add a new alert click the 'Add Alert' button below. When you are finished click the 'Done' button to return to the Form.

⊕ Add Alert   Cancel   Done

Field	Alert Rules	Recipients	
New section - What is the question?	Option equal to Yes	Technical	✎ Update 🗑

Step 7: Repeat steps to add triggers to any question.

1.6 SETUP SCORING CRITERIA

Set the scoring for your Questionnaires here if you want to use it.

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Step 1: Select *Edit Questionnaire*

Step 2: Then select *Scoring Criteria*

Step 3: Select *Add Criteria*

Step 4: Add in your scoring criteria. Then select *Add Criteria*

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Step 5: Repeat steps to add in further scoring criteria i.e. Medium & High

1.7 CREATING CONFIRMATION TEMPLATE

A confirmation form is a form you can create to help you with verification and checking that the questionnaire has been fully & adequately completed. It is a list of questions you might ask yourself to check before confirmation. You can choose to use this or not.

Step 1: Go to the Supplier Questionnaire Manager select dropdown beside the questionnaire & select *Edit Confirmation Template*

Step 2: From here you follow the same steps 4 to 8 in Creating a questionnaire to create your confirmation template.

Step 3: It will look similar to this:

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Step 4: Complete the Confirmation form and you are now ready to send to your suppliers

1.8 SETTING FREQUENCY ON QUESTIONNAIRES

When creating your questionnaire and adding Questionnaire details point 1.3, Step 2, you can add your frequency for renewal/updating a specific questionnaire.

Step 1: Go to Supplier questionnaire and select the dropdown beside the questionnaire & select *Edit Questionnaire Details*
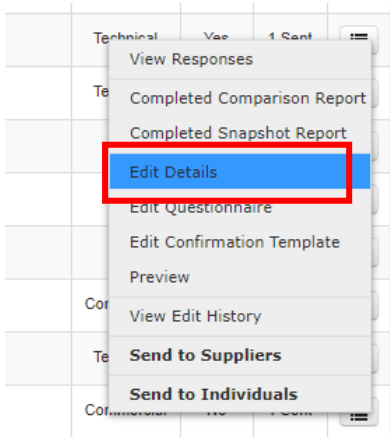
Step 2: *Requires Review* Select *Yes* on the drop down

Step 3: *Review Frequency* will appear, select the *year/month/weeks* that you need the questionnaire reviewed and updated

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	Requires Review	Yes ⌄
	Review Frequency	1	Years ⌄

Please note: This does not automatically resend out the questionnaire – it is a reminder. When questionnaire is set up, you can see review frequency at questionnaire overview.

	Date Sent	Title	Sent By	Sent To	Site	Review	Respond By	Status	
☐	17/06/2020 12:11	Ingredient and Finished Product Supplier self-assessment questionnaire - PUR4001A	Cook Admin Cook	Rob Phelps	Fresh Food Supplies	1 Year	01/07/2020	Requires Your Action	→ Respond ● View
☐	15/06/2020 12:10	Testing	Ravi Sharma Foods Connected Ltd	Rob Phelps	Fresh Food Supplies		29/06/2020	Requires Your Action	→ Respond ● View
☐	26/05/2020	Hilton Food Group CSR Animal Supply Chain Questionnaire	Admin Admin	Rob Phelps	Fresh Food	1 Year	09/06/2020	Requires Your	→ Respond

2   SHARING QUESTIONNAIRES

Step 1: Go back to the main questionnaire table and select the dropdown beside the questionnaire you want to send and select **Send to Suppliers**

Questionnaire Manager

🏛 Company Questionnaires   ← Received Questionnaires   ☰ Activity Overview   📄 Reports ⌄   🔧 Admin

📋 Currently viewing **ALL SITES - ALL CATEGORIES** Questionnaires   Change Filters   Viewing 14 results | Page 1 of 1

➕ Add New   ⟳ Duplicate Selected   🗑 Delete Selected

	Last Modified	Title	Created By	Review Frequency	Type	In Use	Status	
☐	27/04/2020 17:37:28	New questionnaire	Steve Jones	1 Year	Technical	Yes	0 Sent	View Responses
☐	22/04/2020 13:27:52	Demo Co New Supplier Questionnaire (DR, S, Tri, Pag)	Steve Jones	1 Year	SAQ	Yes	50 Sent	Completed Comparison Report
☐	17/04/2020 14:29:27	SAQ Sustainability	Steve Jones	1 Year	Sustainability	No	0 Sent	Completed Snapshot Report
☐	17/04/2020 14:18:12	Supplier Sustainability Questionnaire	Steve Jones	1 Year	Sustainability	Yes	2 Sent	Edit Details
☐	23/03/2020 17:08:46	Goods In	Steve Jones		Technical	Yes	1 Sent	Edit Questionnaire
☐	07/02/2020 11:26:37	Gluten Free Allergen Questionnaire	Steve Jones	1 Year	Technical	Yes	2 Sent	Edit Confirmation Template
☐	19/12/2019 09:48:10	Supplier Volumes	Steve Jones	1 Month	Commercial	Yes	0 Sent	Preview
☐	19/12/2019 08:05:08	Supplier Pesticides Usage	Steve Jones	1 Year	Technical	Yes	0 Sent	View Edit History
								Send to Suppliers
								Send to Individuals

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Step 2: Choose the suppliers you want to send to. You can use the filters to find a specific supplier type, associated site, status and if it is supplied via an agent. If a questionnaire is already shared with a supplier, it will say "(Existing Share)" beside the supplier name. You can filter existing shares out if necessary, also.

Step 3: Now set a respond by date that your suppliers need to respond by, add a title if required and any message. If the supplier is supplied via an agent select who they are supplied via. If they are not this is not relevant.

Once complete, select *Send to Recipients*

Step 4: Your questionnaire has now been sent

3 RESPONDING TO QUESTIONNAIRES

3.1 VIEWING RECEIVED QUESTIONNAIRES
Step 1: Sign in and go to *My Tasks*, you will see a task to *complete a questionnaire*.

Or you can go to the *Received Questionnaires* under Supplier Approval.

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Questionnaire Manager

← Received Questionnaires ☰ Activity Overview 📄 Reports ▾

📋 Currently viewing **ALL SITES** Questionnaires [Change Site]   Viewing 8 results | Page 1 of 1

☐	Date Sent	Title	Sent By	Sent To	Site	Review	Status	
☐	29/04/2020 11:45	Demo Co New Supplier Questionnaire (DR, S, Tri, Pag) - Testing Questionnaire	Steve Jones Demo Co	Elaine Rogers	Ingredients supplier	1 Year	Requires Your Action	→ Respond 👁 View
☐	10/02/2020 11:40	Demo Co New Supplier Questionnaire (DR, S, Tri, Pag)	Steve Jones Demo Co	Elaine Rogers	Ingredients supplier	1 Year	Confirmed	→ Update 👁 View

Step 2: Select *view*

Questionnaire Manager

← Received Questionnaires ☰ Activity Overview 📄 Reports ▾

📋 Currently viewing **ALL SITES** Questionnaires [Change Site]   Viewing 8 results | Page 1 of 1

☐	Date Sent	Title	Sent By	Sent To	Site	Review	Status	
☐	29/04/2020 11:45	Demo Co New Supplier Questionnaire (DR, S, Tri, Pag) - Testing Questionnaire	Steve Jones Demo Co	Elaine Rogers	Ingredients supplier	1 Year	Requires Your Action	→ Respond 👁 View
☐	10/02/2020 11:40	Demo Co New Supplier Questionnaire (DR, S, Tri, Pag)	Steve Jones Demo Co	Elaine Rogers	Ingredients supplier	1 Year	Confirmed	→ Update 👁 View

Step 3: View check in full, once complete select *Back.*

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| Hide Empty Fields | Hide Updates History | Export to PDF | Back | | | | Next | Last >> | Show All |

Questionnaire Title	Demo Co New Supplier Questionnaire (DR, S, Tri, Pag) - Testing Questionnaire
Supplier	Ingredients supplier
Sent Date	29/04/2020
Sent By	Steve Jones
Sent To	Elaine Rogers
Status	Requires Your Action
Last Confirmed Date	

Supplier Details

Company Name	Ingredients supplier
Factory Code	EC 202020
Telephone	+44 123456789
Specification Sign Off Status	Partially Compliant
Approval Document Status	Compliant

1. Introduction

What type of product do you supply?

Company background

Organisational Chart

Management structure

Updates History

Date	Update By	Update Description
29/04/2020	Steve Jones	Sent Questionnaire to Elaine Rogers

3.2 UPDATING RECEIVED QUESTIONNAIRES

This may be in the instance that your customer requires further detail.

Step 1: You will receive another email notification and task assigned in the Task Manager, the received questionnaires will show the same status as in point 1 step 1.

Step 2: Select *Respond*

Supplier Check Manager

📋 Supplier Check Templates   ← Received Supplier Checks   ≡ Activity Overview

📄 Currently viewing **ALL SITES** Supplier Checks   Change Site   Viewing 5 results | Page 1 of 1

Date	Company	Sent By	Sent To	Respond By	Review Frequency	Status		
29/04/2020 10:33:00	Demo Co	Steve Jones	Kevin Smyth	29/05/2020		Requires Your Action	➡ Respond	👁 View

Step 3: Fill in further info as requested

Questionnaire Manager

Demo Co New Supplier Questionnaire (DR, S, Tri, Pag) - Testing Questionnaire - Ingredients supplier   Cancel   📘 1 of 8   Next ▾   Save ▾

ℹ️ Please Note: Only when you reach the final page will you be able to "Save & Send Response" which will notify the sender of your response.

ℹ️ The following information requests have been made since your last response:
- Steve Jones on 29/04/2020: Please enter further info

1. Introduction

What type of product do you supply? *

☑ Meat/Poultry   ☐ Packaging   ☐ Oil
☐ Seafood (Including shellfish)   ☐ Dairy   ☐ Services
☐ Oil   ☐ Cheese   ☐ Machinery
☐ Salt   ☐ Bakery   ☐ laundry
☐ Veg   ☐ Ingredients   ☐ Ready Meals
☐ Fruit

Company background

Organisational Chart   [Choose file] No file chosen   [Enter document description]

Management structure

Cancel   📘 1 of 8   Next ▾   Save ▾

Step 4: Once complete select *Save* then *Save & Send Response*

Questionnaire Manager

Demo Co New Supplier Questionnaire (DR, S, Tri, Pag) - Testing Questionnaire - Ingredients supplier   Cancel   ▾ Previous   📘 8 of 8   Save ▾

ℹ️ Please Note: Only when you reach the final page will you be able to "Save & Send Response" which will notify the sender of your response.

ℹ️ The following information requests have been made since your last response:
- Steve Jones on 29/04/2020: Please enter further info

Additional Meat Supplier Information

Do you use any 3rd party slaughter houses?   [No   ▼]

If Yes, how many?   [   ]

Please include Slaughter House Name, Address (including EC Code and Post Code)

Cancel   ▾ Previous   📘 8 of 8   Save ▾

Save Progress
Save Progress & Exit
Save & Send Response

FOODS   Quick Links   Suppor

Step 5: The response has been sent again, and the Status will revert to *Awaiting Response.* Your customer will be advised that they need to review and confirm.

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3.3 RESPONDING TO RECEIVED QUESTIONNAIRES

Once you have finished reviewing you can now respond to the questionnaire

Step 1: Once there select *respond*

Step 2: Now fill in your responses, go through every page and upload any information that may have been requested taking care to complete required questions which are highlighted with an Asterix.

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Step 3: Once you get to the end or end page select *Save* then *Save & Send Response*

Step 4: Once complete the status reverts to *Awaiting Response.* This means that your response is with your customer for review and confirmation.

3.4 RECALLING A QUESTIONNAIRE

You can recall your questionnaire response in the instance that you might need to legitimately change some answers.

Step 1: Select *Update* beside questionnaire

Step 2: Then select *Recall*

Step 3: Update your answers

Questionnaire Manager

Demo Co New Supplier Questionnaire (DR, S, Tri, Pag) - Testing Questionnaire - Ingredients supplier   Cancel 1 of 8 Next ▾ Save ▾

ℹ Please Note: Only when you reach the final page will you be able to "Save & Send Response" which will notify the sender of your response.

1. Introduction

What type of product do you supply? *

☑ Meat/Poultry   ☐ Packaging   ☐ Oil
☐ Seafood (Including shellfish)   ☐ Dairy   ☐ Services
☐ Oil   ☐ Cheese   ☐ Machinery
☐ Salt   ☐ Bakery   ☐ laundry
☐ Veg   ☐ Ingredients   ☐ Ready Meals
☐ Fruit

Company background

Organisational Chart   Choose file No file chosen   Enter document description

Management structure

Cancel 1 of 8 Next ▾ Save ▾

Step 4: Once complete and you are at the end of the questionnaire select *Save* then ***Save & Send Response***

Questionnaire Manager

Demo Co New Supplier Questionnaire (DR, S, Tri, Pag) - Testing Questionnaire - Ingredients supplier   Cancel ▾ Previous 8 of 8 Save ▾

ℹ Please Note: Only when you reach the final page will you be able to "Save & Send Response" which will notify the sender of your response.

Additional Meat Supplier Information

Do you use any 3rd party slaughter houses?   No ▾

If Yes, how many?

Please include Slaughter House Name, Address (including EC Code and Post Code)

Cancel ▾ Previous 8 of 8 Save ▾

Save Progress
Save Progress & Exit
Save & Send Response

FOODS   Quick Links   Suppo...

Step 5: The status reverts to ***Awaiting Response.*** This creates a task for your customer to review and confirm.

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4 VIEWING RECEIVED QUESTIONNAIRES

4.1 VIEWING COMPLETED QUESTIONNAIRES

Next step is to view the completed questionnaire on the desktop

Step 1: Once a questionnaire is complete go back to your desktop and choose the relevant questionnaire & select *View Responses.*

Step 2: A list of all the completed & pending questionnaires will show

Step 3: You can view each questionnaire by selecting the options icon to the right of the questionnaire and then *View Response*. **From here you can also Amend recipient, request more info, confirm & close & lock.**

Step 4: Navigate through the pages to view the response in full, once complete select *back*

4.2 REQUESTING MORE INFO ON QUESTIONNAIRES

Step 1: To Request More Info if responses are not adequate you can do this at 4.1. Simply select the questionnaire then select *Request More Info*

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Step 2: Then enter in a response or define what further info you need in the comments box, choose a *Respond by Date,* select *Send*

Step 3: The status reverts to *Awaiting Response*

Step 4: The supplier completes and sends back. The status is at *Requires Your Review*

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Supplier Check Manager: Completed - Animal Welfare Supplier Check (Dr, Frq, S, Ca, Tri) ← Back

	Date Completed	Supplier	Wilful acts of abuse	Any Sensible animals dragged	Completed By	Shared With	Points (Score Rating)	Respond By Date	Open Issues	Status	
☐	27/04/20 10:42	Meat Supplier	Yes	Yes	Steve Jones	Kevin Smyth	2 (Low)	27/05/2020	1	Requires Your Action	☰

Step 5: Re-follow steps in 4.1 & 4.1 to confirm when you are happy.

4.3 CONFIRMING QUESTIONNAIRES

Step 1: Once you are happy and want to confirm select the icon and then **Confirm**

Questionnaire Manager - Demo Co New Supplier Questionnaire (DR, S, Tri, Pag) ← Back

Viewing 50 results | Page 1 of 1

	Date Sent	Sent By	Supplier	Sent To	Points	Last Confirmed	Review Date	Status	
☐	10/02/2020	Steve Jones	Customer 1	User 1 Customer 1	0/0 (Low Risk)			Awaiting Response	☰
☐	10/02/2020	Steve Jones	Ingredient Trading Agent	Brad Fielding	0/0 (Low Risk)			Awaiting Response	☰
☐	10/02/2020	Steve Jones	Packaging supplier	Gregory Donaldson	0/0 (Low Risk)			Awaiting Response	☰
☐	10/02/2020	Steve Jones	Transport	User 1 Transport	0/0 (Low Risk)			Awaiting Response	☰
☐	25/04/2020	Steve Jones	Meat Processor	User 1 Meat Processor	15/323 (Low Risk)			Awaiting Response	☰

View Response
Request More Info
Amend Recipient
Edit Sections Shown
Close & Lock
Confirm

4.4 CLOSING QUESTIONNAIRES

The closing questionnaire functionality is only used when you are delisting a supplier as this will stop the review process (if set up) which will in turn stop reminder emails being sent to suppliers. Instead, only confirm the questionnaires as outlined in section 4.3 to ensure the review frequency stays in place.

Step 1: . If you are happy that the supplier no longer needs to review the questionnaire (due to delisting or other circumstances), select **Close & Lock**

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Step 2: Enter details for closing the questionnaire, then click **Close & Lock**

4.5 FILTERING RECEIVED QUESTIONNAIRES

When questionnaires are being retrieved, and you have several questionnaires that run over several pages, within FC Questionnaire Manager Search bar, you can search by the following filters.

- Status
- Sent By (Customer)
- Sent To
- Sort (A-Z, Due Date, Status, Date Sent)
- Site

Sort by filter have the following options.

All other options will be prepopulated with filter options depending on your specific account.

4.6 BULK CLOSING QUESTIONNAIRES

When creating questionnaire details for set will highlight if you want to "Enable Bulk Close". This functionality will allow you to switch this ability on and off, depending on the questionnaire, site or account.

Enabling this functionality, when clicking "Review Reponses" in the context menu the bulk close button (blue) will be visible beside the existing button functionalities.

To Bulk Close questionnaires, click multiple questionnaires on the left-hand side boxes on "View Response" page of Questionnaire Manager. When you have selected the questionnaires you would like to close/lock, simply just select "Bulk Close Selected"

5   REPORTING QUESTIONNAIRES

5.1 CREATING COMPLETED COMPARISON REPORTS

Completed Comparison Reports are used to compare the responses from a specific question (or questions) against each other. This allows you to compare data from different suppliers that completed that questionnaire.

Please ensure you are in the Company Questionnaires section to complete a Completed Comparison Report.

Step 1: Select the questionnaire you would like to report on

Step 2: Select *Completed Comparison Report*

Step 3: Change the Fields Display, to*Left to Right* and select *date filtering* (dependent on when you would

like to compare the data from). You can also *select specific suppliers* you would like to include or you can

leave it as *all suppliers*. Click *Next* when done.

Next > Back

Fields Display	Left to Right ⌄
Sent Date Filtering	⦿ Date Range ○ From Set Date ○ During Set Time Period ○ Current Year to Date ○ Company Period ○ Last Period ○ Current Period
Date Range	[📅] [📅]

Supplier Options

⦿ All Current Suppliers whenever report is run   ○ Filtered Supplier selection from current list

Next >

Step 4: Select the specific fields you would like to report upon (this is the information you want to pull out of the questionnaire.

Questionnaire Manager

New Supplier Questionnaire (DR, S, Tri, Pag) - Comparison Report: Step 2   ← Back to Company Questionnaires

🔍 Search Questions...   Back   Generate Report

☐	Section	Field
☐	1. Introduction	What type of product do you supply?
☐	1. Introduction	Company background
☐	1. Introduction	Organisational Chart
☐	1. Introduction	Management structure
☐	1. Introduction	Do source any material from Russia?
☐	1. Introduction	Do you source from China?
☐	2. Supplier Details	Location
☑	2. Supplier Details	Current BRC Grade
☐	2. Supplier Details	If there is no BRC in place, please indicate how you manage food safety?

Step 5: Select *Generate Report*

Step 6: A report will now appear. At the top right of the screen click *Export to Excel*

Back   Export to Excel   Export to CSV

Step 7: Open the excel report and save it in your document

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Note: You now have the ability to now run a comparison report with questionnaires only sent to individuals. This step can be completed at Step 1 after selecting "Complete Comparison Report"- must select the option "Filtered Supplier Selection from Current List".

5.1.1 CREATING AND EXPORTING RECEIVED COMPARISON REPORTS ON MULTIPLE QUESTIONNAIRES

Ensure you are in the Received Questionnaires section of Questionnaire Manager

Step 1: Click the *Questionnaire* filter and choose the relevant questionnaire template using the search bar

Step 2: Click *Filter*

Step 3: Click which questionnaires you would like the comparison report on. If you would like all questionnaires included, see steps 4 and 5.

Step 4: Click ***Received Comparison Report***.

Step 5: If you have selected which questionnaires you want the report from, click *Selected Questionnaires*.

If you would like all questionnaires included, click *All Questionnaires*.

A report is then generated which will look similar to this:

Step 6: To view the report in Excel click the *Export to Excel* button

Back | Export to Excel
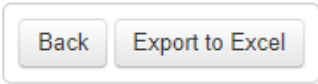
Please note that the questionnaires must all be the same for this type of comparison report to work correctly.

This also means that only one questionnaire template can be chosen at a time.

5.2 CREATING SNAPSHOTS

Step 1: Sign into Foods Connected and select **Supplier Approval** then select **Supplier Questionnaire**

Step 2: Select dropdown beside relevant Risk Assessment and select **Completed Snapshot Report**

Step 3: Select required reporting parameters and select **Next**

Step 4: Complete requirements for the report and select **Next**

Date Filtering	● Date Range ○ From Set Date ○ During Set Time Period ○ Current Year to Date
Date Range	12/05/2020 26/06/2020
Report on Field of Type	● Numeric ○ Dropdown ○ Overall Count
Numeric Field	None ▼
Dropdown / Timespan	Suppliers ▼
Output Type	Totals ▼
Charts Type	Pie Chart ▼
Legend Percentages	● Shown ○ Hidden
Total/Average per Outcome	● Shown ○ Hidden
Summarize By	Suppliers ▼ Add
Report Comments	

Select the field you would like to report on

Select the type of format you would like your report to be

Step 5: Select **Create Dashboard Widget.** Select **Save As** then select **New Widget.**

Date Range	27/01/2020 to 23/03/2020
Suppliers	👁 Show All
Dropdown Field	Flock Information - How many different types of antibiotics did you use this year? (January 2019 - January 2020)
Overall Total	2416
Average Per Outcome	483.2

Flock Information - How many different types of antibiotics did you use this year? (January 2019 - January 2020)   ◐ Create Dashboard Widget

Key	Outcome	Average	Percentage
	7	15.28	31.66%
	4	14.32	29.67%
	3	9.47	19.62%
	5	5.38	11.15%
	2	3.81	7.89%

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Back To... ▾   Amend Parameters ▾   Save As... ▾

New Widget

Widget Title   Flock Information - How many different types of antil

Widget Site   ▾

Widget Access Level   All Users ▾

Flock Information - How many different types of antibiotics did you use this year? (January 2019 - January 2020)

Key	Outcome	Average	Percentage
	7	15.28	31.66%
	4	14.32	29.67%
	3	9.47	19.62%
	5	5.38	11.15%
	2	3.81	7.89%

Total: 2416
Average per Outcome: 483.2

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