

accessre

# TOOL USER GUIDE



# SUPPLIER QUESTIONNAIRES



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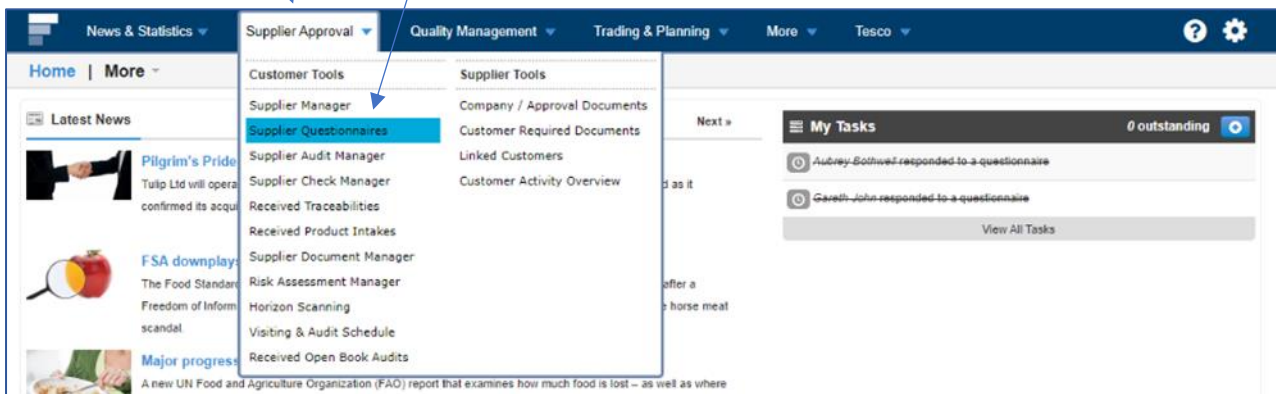
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## 1. CREATING QUESTIONNAIRE TEMPLATES

### 1.1 WHERE TO FIND QUESTIONNAIRE MANAGER

**Step 1:** Log onto your Foods Connected Account

Click Supplier Approval, then Received/Supplier Questionnaires



## 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](#) [Duplicate Selected](#) [Delete Selected](#)

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

<input type="checkbox"/>	Questionnaire Type Name
<input type="checkbox"/>	Financial
<input type="checkbox"/>	SAQ
<input type="checkbox"/>	Commercial
<input type="checkbox"/>	Technical
<input type="checkbox"/>	Sustainability

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

### Add/Update Questionnaire Types ✕

## 1.3 CREATING / EDITING A QUESTIONNAIRE TEMPLATE

### Step 1: Select *Add new*

**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 | Duplicate Selected | Delete Selected

<input type="checkbox"/>	Last Modified	Title	Created By	Review Frequency	Type	In Use	Status	
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<input type="checkbox"/>	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:** Now you are on the setup details of that specific questionnaire.

**Questionnaire Manager - Create Questionnaire** ← Back

Setup

Site: Company 70 (Group) Set your questionnaire to a site.

Title: Enter a title Name your questionnaire.

Questionnaire Type: -- Select Type -- Set your quest as a type

Questionnaire In Use: Yes Set your quest to require a review.

Default Locale: English

Requires Review: No

Confidential Share: No (if yes - only the person this questionnaire is shared with can view it)

Limit Internal Visibility: No (if yes - this questionnaire is only visible to selected users shown, otherwise visible to all)

Enable Bulk Close: Off (Enables questionnaires associated with this template to be bulk closed)

Associated Questionnaire: -- None -- (enables using fields from the associated questionnaire to based visibility/required conditions on)

Supplier Types:  All Supplier Types  Select Supplier Types Select Supplier Types to be shown for Questionnaire

Scoring System Setup

Scoring on Form: None Turn on scoring here if it is needed.


Cancel Save & Exit Save & Edit 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**

s	0 Sent		
s	0 Sent		View Responses
s	0 Sent		Completed Comparison Report
s	0 Sent		Completed Snapshot Report
s	3 Sent		<b>Edit Details</b>
s	1 Sent		Edit Questionnaire
s	1 Sent		Edit Confirmation Template
s	4 Sent		Preview
s	4 Sent		View Edit History
s	1 Sent		<b>Send to Suppliers</b>
s	7 Sent		<b>Send to Individuals</b>

## 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 the Schedule Name**

Description

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

Start Date

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

Schedule Dates

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

Supplier Type: All Supplier Sub type: All Status: All Supplied Via: All

<input type="checkbox"/>	Supplier/Customer	Supplier Name	Supplier Type
<input type="checkbox"/>	Supplier	COOK	Test
<input type="checkbox"/>	Supplier	COOK - Production Site	Test
<input type="checkbox"/>	Supplier	CPF - Demo 1	Meat
<input type="checkbox"/>	Supplier	Demo Company 1	Ingredients
<input type="checkbox"/>	Customer	Demo Customer	---
<input type="checkbox"/>	Supplier	Demo Customer	Ingredients
<input type="checkbox"/>	Supplier	Foods Connected	Test
<input type="checkbox"/>	Supplier	Fresh Food Supplies	Seafood

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

## Step 4: Click Confirm Suppliers

<input type="checkbox"/>	Supplier	Test Supplier11	Meat
<input type="checkbox"/>	Supplier	Test Supplier111	Meat
<input type="checkbox"/>	Supplier	WalkMe	Meat

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

Select Sections    ALL sections are selected    + Select specific sections to share

Supplier Name	Via	Contact Name / CC User(s)
Fresh Food Supplies - Site 2	---	<div style="border: 2px solid red; padding: 2px;">           Rob Phelps    - CC in User(s) -         </div>

Cancel    Update Suppliers    Generate Schedule

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

Select Sections    ALL sections are selected    + Select specific sections to share

Supplier Name	Via	Contact Name / CC User(s)
Fresh Food Supplies - Site 2	---	<div style="border: 2px solid red; padding: 2px;">           Rob Phelps    - CC in User(s) -         </div>

Cancel    Update Suppliers    Generate Schedule

The schedule will appear as shown below.

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

Questionnaire Manager - Edit Questionnaire ← Back

Setup    Preset Company Details    Auto Share Schedule

Add New

Schedule Title	Date Range	Next Share Date	Actions
Guide Example	24/06/2022 - 28/10/2022	24/06/2022	<div style="border: 2px solid red; padding: 2px;">      </div>

## 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**.

Questionnaire Manager - Update Form ← Back

Template Name  
 New questionnaire    Save Title    Edit Options

Add New Section

Form Preview

*You have not added any elements to your form yet. To get started, click 'Add New Section'.*



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

**Add New Section** ✕

Section Name

Page Break After  No

Expand / Collapse  No

Intro Text *(Optional)*  
Instructions regarding completing section 

This text is here to inform you |

**Quick Add Section Fields**

Label	Type	Hide Label	Required
<input type="text"/>	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>

## New Section looks like this below

Questionnaire Manager - Update Form ← Back

Template Name  
New questionnaire

Edit Options  



 Scoring Criteria

**Form Preview**

New section ⊕ ⊖

ⓘ This text is here to inform you

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

Supplier Check Manager - Update Form ← Back

Template Name  
Testing model

Edit Options

**Form Preview**

New section ⊕ ⊖

- Section
- Standard Field
- External Field

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

The screenshot shows the 'Add New Field' form with several callout boxes:

- Field Label:** A text input containing 'What is the question?' with a 'Show' button. Callout: 'Enter your question here'.
- Section:** A dropdown menu set to 'New section'.
- Field Type:** A dropdown menu set to 'Standard Dropdown - Single'. Callout: 'Choose the field type or way to answer question'.
- Options:** A list with 'Yes' and 'No' items, each with an up/down arrow. Callout: 'Choose the answers or options for the question'.
- Help Text:** A text area containing 'Guide your users with help text'. Callout: 'Help text is good to guide the user'.
- Help Image:** A 'Choose file' button and 'No file chosen' text.
- Required:** Radio buttons for 'Always' (selected) and 'Condition Based'. Callout: 'Select if this question is required to be answered by the user'.
- Visible:** Radio buttons for 'Always' (selected) and 'Condition Based'. Callout: 'Select if this question is conditionally based on the answer of another question.' and '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.

The screenshot shows the 'Field Type' dropdown menu with 'Help File - provide a file that the user can download for more information' selected. Below it, the 'File' field has a 'Choose file' button and 'No file chosen' text.

Then follow the rest of the steps below

**Step 5:** Once done select **Add Field**

The 'Add New Field' dialog box contains the following fields and options:

- Field Label:** Text input with 'What is the question?' and a 'Show' button.
- Section:** Dropdown menu with 'New section' selected.
- Field Type:** Dropdown menu with 'Standard Dropdown - Single' selected.
- Options:** List with 'Yes' and 'No', each with an up/down arrow, edit icon, and delete icon. An 'Add' button is below the list.
- Help Text:** Text area with 'Guide your users with help text'.
- Help Image:** File selection area with 'Choose file' and 'No file chosen'.
- Required:** Radio buttons for 'No' (selected), 'Always', and 'Condition Based'.
- Visible:** Radio buttons for 'Always' (selected) and 'Condition Based'.
- Buttons:** 'Cancel' and 'Add Field' (highlighted with a red box).

**New Field looks like this below**

The 'Questionnaire Manager - Update Form' interface includes:

- Template Name:** 'New questionnaire' with a 'Save Title' button.
- Edit Options:** 'Add New', 'Reorder', 'Triggers', and 'Scoring Criteria' buttons.
- Form Preview:** A section titled 'New section' containing a question 'What is the question?' with a dropdown menu set to '--Please Select--'.

**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  Show

Section

Field Type

Weighted Options   Add

Help Text

Help Image  No file chosen

Required  No  Always  Condition Based

Visible  Always  Condition Based

Show in Completed Table  No

Delete Field Cancel Update Field

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

## 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*

**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	
<input type="checkbox"/>	27/04/2020 17:37:28	New questionnaire	Steve Jones	1 Year	Technical	Yes	0 Sent	<ul style="list-style-type: none"><li>View Responses</li><li>Completed Comparison Report</li><li>Completed Snapshot Report</li><li>Edit Details</li><li><b>Edit Questionnaire</b></li><li>Edit Comparison Template</li><li>Preview</li><li>View Edit History</li><li>Send to Suppliers</li><li>Send to Individuals</li></ul>
<input type="checkbox"/>	22/04/2020 13:27:52	Demo Co New Supplier Questionnaire (DR, S, Tri, Pag)	Steve Jones	1 Year	SAQ	Yes	50 Sent	
<input type="checkbox"/>	17/04/2020 14:29:27	SAQ Sustainability	Steve Jones	1 Year	Sustainability	No	0 Sent	
<input type="checkbox"/>	17/04/2020 14:18:12	Supplier Sustainability Questionnaire	Steve Jones	1 Year	Sustainability	Yes	2 Sent	
<input type="checkbox"/>	23/03/2020 17:08:46	Goods In	Steve Jones		Technical	Yes	1 Sent	
<input type="checkbox"/>	07/02/2020 11:26:37	Gluten Free Allergen Questionnaire	Steve Jones	1 Year	Technical	Yes	2 Sent	
<input type="checkbox"/>	19/12/2019 09:48:10	Supplier Volumes	Steve Jones	1 Month	Commercial	Yes	0 Sent	
<input type="checkbox"/>	19/12/2019 08:05:08	Supplier Pesticides Usage	Steve Jones	1 Year	Technical	Yes	0 Sent	

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

**Edit Options**

[Add New](#) | [Reorder](#) | [Triggers](#) | [Page Names](#) | [Next](#)

- Section
- Standard Field
- External Field**

1 of 3 | Next

[+](#) | [↻](#)

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

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	<input type="text"/> 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 - Exj

Minimum Value  Maximum Value  Average Value  Sum Of Values

Cancel Add Field

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

**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**

**Step 4:** Select *Add Field*

## 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*.

Questionnaire Manager - Update Form

Template Name: New questionnaire [Save Title]

Edit Options: Add New, Reorder, Triggers, Email Alerts, Scoring, Criteria

Form Preview

New section

This text is here to inform you

What is the question? --Please Select--

**Step 2:** Now select **Add Alert**

Questionnaire Manager - Update Form - New questionnaire - Email Alerts

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
You have not added any alerts.		

**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

Questionnaire Manager - New questionnaire - Email Alerts

Field: New section - What is the question?

Field Option: Yes

Recipients: -- Please Select -- [Add to list]

Technical

[Cancel] [Save]

**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 -- <span>Add to list</span>
	Technical <span>×</span>

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 -- <span>Add to list</span>
	Technical <span>×</span>

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	<span>Update</span> <span>✖</span>

**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.



### Step 1: Select *Edit Questionnaire*

**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

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<input type="checkbox"/>	19/12/2019 08:05:08	Supplier Pesticides Usage	Steve Jones	1 Year	Technical	Yes	0 Sent	

### Step 2: Then select *Scoring Criteria*

**Questionnaire Manager - Update Form** ← Back

Template Name: New questionnaire  Edit Options: + Add New Reorder Triggers  Scoring Criteria

Form Preview

New section

This text is here to inform you

What is the question?

### Step 3: Select *Add Criteria*

**Questionnaire Manager - Update Form - New questionnaire - Scoring Criteria** ← Back

To add a new criteria click the 'Add Criteria' button. When you are finished click the 'Done' button to return to the Form.

Form/Section/Field Value	Description/Points	Min Value	Max Value	Dependent On	Colour
You have not added any scoring criteria...					

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

**Add Scoring Criteria** [Close]

Per Form / Section Name: Per Form [Info]

Per Section / Field Value: N/A

Description: Low

Min Value: 0

Max Value: 10

Colour: [Green bar] [Delete]

[Cancel] [Add Criteria]

**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*

**Questionnaire Manager**

Company Questionnaires | Received Questionnaires | Activity Overview | Reports | Admin

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<input type="checkbox"/>	07/02/2020 11:26:37	Gluten Free Allergen Questionnaire	Steve Jones	1 Year	Technical	Yes	2 Sent	
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<input type="checkbox"/>	19/12/2019 08:05:08	Supplier Pesticides Usage	Steve Jones	1 Year	Technical	Yes	0 Sent	

**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:

Questionnaire Manager - Update Form ← Back

Edit Options  
Add New Reorder

Demo Co New Supplier Questionnaire (DR, S, Tri, Pag) - Assessment Template - Form Preview

**Details** ⊕ ↻

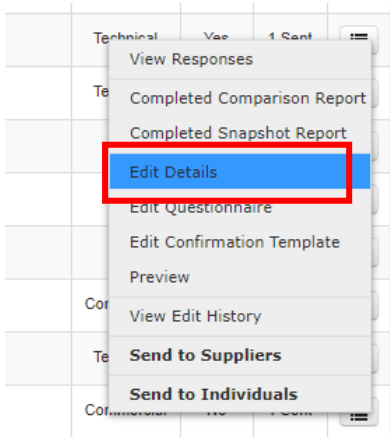
Is the supplier uk based?	--Please Select-- Enter a comment
Has the supplier uploaded their Approval procedure?	--Please Select-- Enter a comment
Is their BRC grade B & above?	--Please Select-- Enter a comment

**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

Requires Review

Review Frequency

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.

<input type="checkbox"/>	Date Sent	Title	Sent By	Sent To	Site	Review	Respond By	Status	
<input type="checkbox"/>	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	<a href="#">→ Respond</a> <a href="#">View</a>
<input type="checkbox"/>	15/06/2020 12:10	Testing	Ravi Sharma Foods Connected Ltd	Rob Phelps	Fresh Food Supplies		09/06/2020	Requires Your Action	<a href="#">→ Respond</a> <a href="#">View</a>
<input type="checkbox"/>	26/05/2020	Hilton Food Group CSR Animal Supply Chain Questionnaire	Admin Admin	Rob Phelps	Fresh Food	1 Year	09/06/2020	Requires Your	<a href="#">→ Respond</a>

## 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](#)

<input type="checkbox"/>	Last Modified	Title	Created By	Review Frequency	Type	In Use	Status	
<input type="checkbox"/>	27/04/2020 17:37:28	New questionnaire	Steve Jones	1 Year	Technical	Yes	0 Sent	
<input type="checkbox"/>	22/04/2020 13:27:52	Demo Co New Supplier Questionnaire (DR, S, Tri, Pag)	Steve Jones	1 Year	SAQ	Yes	50 Sent	
<input type="checkbox"/>	17/04/2020 14:29:27	SAQ Sustainability	Steve Jones	1 Year	Sustainability	No	0 Sent	
<input type="checkbox"/>	17/04/2020 14:18:12	Supplier Sustainability Questionnaire	Steve Jones	1 Year	Sustainability	Yes	2 Sent	
<input type="checkbox"/>	23/03/2020 17:06:46	Goods In	Steve Jones		Technical	Yes	1 Sent	
<input type="checkbox"/>	07/02/2020 11:26:37	Gluten Free Allergen Questionnaire	Steve Jones	1 Year	Technical	Yes	2 Sent	
<input type="checkbox"/>	19/12/2019 09:48:10	Supplier Volumes	Steve Jones	1 Month	Commercial	Yes	0 Sent	
<input type="checkbox"/>	19/12/2019 08:05:08	Supplier Pesticides Usage	Steve Jones	1 Year	Technical	Yes	0 Sent	

- View Responses
- Completed Comparison Report
- Completed Snapshot Report
- Edit Details
- Edit Questionnaire
- Edit Confirmation Template
- Preview
- View Edit History
- Send to Suppliers**
- Send to Individuals

**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.

Questionnaire Manager - Send New Supplier Questionnaire (DR, S, Tri, Pag) - Step 1 ← Back

Associated Site	Supplier Type	Supplier Sub Type	Status	Show Existing Shares	Supplied Via	<input type="button" value="Filter"/>
All	All	All	All	Yes	All	<input type="button" value="Clear Filters"/>

Search...

<input type="checkbox"/>	Supplier/Customer	Supplier Name	Supplier Type
<input checked="" type="checkbox"/>	Customer	Abattoir 1	---
<input type="checkbox"/>	Supplier	Abattoir 1 <i>(Existing Share)</i>	Meat Processor
<input type="checkbox"/>	Customer	Abattoir 2 <i>(Existing Share)</i>	---
<input checked="" type="checkbox"/>	Supplier	Abattoir 2	Meat

**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**

Respond By Date:

Secondary Title:

Include Message:

Select Sections ALL sections are selected + Select specific sections to share

Supplier Name	Via	Contact Name / CC User(s)
Abattoir 3	---	User 1 Abattoir 3 (Technical Conti) - CC in User(s)
Bakery Supplier	- Select -	Joanne Fox (Technical Contact) - CC in User(s)
Butter Supplier	---	Jane Morrison (Technical Contact) - CC in User(s)
Cheese supplier	- Select -	Sam Herron (Technical Contact) - CC in User(s)
Cleaning services	---	Martin Smyth (Technical Contact) - CC in User(s)
Cold Store	---	User 1 Cold stores (Technical Cor) - CC in User(s)

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*.

Home Interactive Dashboards

Latest News

**It would require a 'monumental shift' for sustainability to top the corporate agenda**  
Significant commitments on issues like food waste or plastic pollution would suggest that sustainability is moving up the corporate priority list. However, with consumer sentiment sliding and upward pricing pressure on the horizon, it would require a 'monumental shift' for sustainability to continue its ascent in the boardroom.

**Experts weigh in on digestive health in Kerry Health and Nutrition Institute webinar**  
Gut health is becoming increasingly popular among consumers. In this wide-ranging health area, the gut-brain axis (GBA) is a key area of interest, along with the sort of probiotic bacteria that aid wider gut health, Dairy & Food Culture Technologies Consultant, Dr. Mary Ellen Sanders, tells NutritionInsight.

**The Beyond Burger finally goes on sale in Tesco**  
US-based alternative protein business Beyond Meat has revealed its Beyond Burger is now available to purchase at UK retailer Tesco, following a lengthy delay.

**My Tasks** 7 outstanding

- Steve Jones sent you a questionnaire to complete
- Steve Jones sent you a questionnaire to complete
- Steve Jones sent you a questionnaire to complete
- Steve Jones sent you a questionnaire to complete
- Steve Jones sent you an Audit - Response Required

View All Tasks

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

### Questionnaire Manager

← Received Questionnaires Activity Overview Reports ▾

Currently viewing ALL SITES Questionnaires Change Site

Viewing 8 results | Page 1 of 1

<input type="checkbox"/>	Date Sent	Title	Sent By	Sent To	Site	Review	Status	
<input type="checkbox"/>	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	<a href="#">→ Respond</a> <a href="#">View</a>
<input type="checkbox"/>	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	<a href="#">→ Update</a> <a href="#">View</a>

### 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

<input type="checkbox"/>	Date Sent	Title	Sent By	Sent To	Site	Review	Status	
<input type="checkbox"/>	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	<a href="#">→ Respond</a> <a href="#">View</a>
<input type="checkbox"/>	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	<a href="#">→ Update</a> <a href="#">View</a>

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



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

Next | Last >> | Show All

### 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	<b>→ Respond</b>   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

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.

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? \*

<input checked="" type="checkbox"/> Meat/Poultry	<input type="checkbox"/> Packaging	<input type="checkbox"/> Oil
<input type="checkbox"/> Seafood (Including shellfish)	<input type="checkbox"/> Dairy	<input type="checkbox"/> Services
<input type="checkbox"/> Oil	<input type="checkbox"/> Cheese	<input type="checkbox"/> Machinery
<input type="checkbox"/> Salt	<input type="checkbox"/> Bakery	<input type="checkbox"/> Laundry
<input type="checkbox"/> Veg	<input type="checkbox"/> Ingredients	<input type="checkbox"/> Ready Meals
<input type="checkbox"/> Fruit		

Company background

Organisational Chart

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

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.

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 Support

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.

**Questionnaire Manager**

← Received Questionnaires Activity Overview Reports ▾

Success - your response has been successfully sent.

Currently viewing ALL SITES Questionnaires Change Site Viewing 8 results | Page 1 of 1

<input type="checkbox"/>	Date Sent	Title	Sent By	Sent To	Site	Review	Status	
<input type="checkbox"/>	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	Awaiting Response	<a href="#">→ Responder</a> <a href="#">View</a>
<input type="checkbox"/>	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	<a href="#">→ Update</a> <a href="#">View</a>

### 3.3 RESPONDING TO RECEIVED QUESTIONNAIRES

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

**Step 1:** Once there select *respond*

**Questionnaire Manager**

← Received Questionnaires Activity Overview Reports ▾

Currently viewing ALL SITES Questionnaires Change Site Viewing 8 results | Page 1 of 1

<input type="checkbox"/>	Date Sent	Title	Sent By	Sent To	Site	Review	Status	
<input type="checkbox"/>	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	<a href="#">→ Respond</a> <a href="#">View</a>
<input type="checkbox"/>	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	<a href="#">→ Update</a> <a href="#">View</a>

**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.

Questionnaire Manager

Demo Co New Supplier Questionnaire (DR, S, Tri, Pag) - Testing Questionnaire - Ingredients supplier

Cancel 1 of 9 Next Save

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
- Seafood (Including shellfish)
- Oil
- Salt
- Veg
- Fruit
- Packaging
- Dairy
- Cheese
- Bakery
- Ingredients
- Oil
- Services
- Machinery
- Laundry
- Ready Meals

Company background

Organisational Chart

Choose file No file chosen Enter document description

Management structure

Cancel 1 of 9 Next Save

Step 3: Once you get to the end or end page 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

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

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

**Questionnaire Manager**

← Received Questionnaires | Activity Overview | Reports ▾

Success - your response has been successfully sent.

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	Awaiting Response	<a href="#">→ Respond</a> <a href="#">View</a>
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	<a href="#">→ Update</a> <a href="#">View</a>

### 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

**Questionnaire Manager**

← Received Questionnaires | Activity Overview | Reports ▾

Success - your response has been successfully sent.

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 13:19	Demo Co New Supplier Questionnaire (DR, S, Tri, Pag) - Testing Questionnaire	Steve Jones Demo Co	Elaine Rogers	Ingredients supplier	36 Months	Confirmed	<a href="#">→ Update</a> <a href="#">View</a>

**Step 2:** Then select *Recall*

**Questionnaire Manager**

✓ This questionnaire has been confirmed by the sender. [Recall](#)

If you wish to make changes, please recall the questionnaire. When you have finished making changes, please choose 'Save & Send Response' to send your response back to the sender.

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

**1. Introduction**

What type of product do you supply? Meat/Poultry

Company background

Organisational Chart

Management structure

[Cancel](#) [1 of 8](#) [Next ▾](#)

**Step 3:** Update your answers

**Questionnaire Manager**

Demo Co New Supplier Questionnaire (DR, S, Tri, Pag) - Testing Questionnaire - Ingredients supplier

*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? \*

<input checked="" type="checkbox"/> Meat/Poultry	<input type="checkbox"/> Packaging	<input type="checkbox"/> Oil
<input type="checkbox"/> Seafood (Including shellfish)	<input type="checkbox"/> Dairy	<input type="checkbox"/> Services
<input type="checkbox"/> Oil	<input type="checkbox"/> Cheese	<input type="checkbox"/> Machinery
<input type="checkbox"/> Salt	<input type="checkbox"/> Bakery	<input type="checkbox"/> Laundry
<input type="checkbox"/> Veg	<input type="checkbox"/> Ingredients	<input type="checkbox"/> Ready Meals
<input type="checkbox"/> Fruit		

Company background

Organisational Chart

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

*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 Support

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

**Questionnaire Manager**

← Received Questionnaires Activity Overview Reports

Success - your response has been successfully sent.

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 13:19	Demo Co New Supplier Questionnaire (DR, S, Tri, Pag) - Testing Questionnaire	Steve Jones Demo Co	Elaine Rogers	Ingredients supplier	36 Months	Awaiting Response	<a href="#">Response</a> <a href="#">View</a>

## 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*.

**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	
22/04/2020 13:27:52	Demo Co New Supplier Questionnaire (DR, S, Tri, Pag)	Steve Jones	1 Year	SAQ	Yes	50 Sent	<a href="#">View Responses</a>
17/04/2020 14:29:27	SAQ Sustainability	Steve Jones	1 Year	Sustainability	No	0 Sent	<a href="#">Completed Comparison Report</a>
17/04/2020 14:18:12	Supplier Sustainability Questionnaire	Steve Jones	1 Year	Sustainability	Yes	2 Sent	<a href="#">Completed Snapshot Report</a>
23/03/2020 17:08:46	Goods In	Steve Jones		Technical	Yes	1 Sent	<a href="#">Edit Details</a>
07/02/2020 11:26:37	Gluten Free Allergen Questionnaire	Steve Jones	1 Year	Technical	Yes	2 Sent	<a href="#">Edit Questionnaire</a>
							<a href="#">Edit Confirmation Template</a>
							<a href="#">Preview</a>

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



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

Questionnaire Status: All  Associated Site: All  Lead Technical: All  Score: All  Recipient Status: All  Search:  Filter

Supplier Type: All  Supplier Status: All  Primary/Secondary: All  High Risk: All  Sort By: Review Date (Ascend) Clear Filters

Delete Selected Request More Info Export To PDF 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
27/04/2020	Steve Jones	Meat Processor	User 1 Meat Processor	0/0 (Low Risk)			Awaiting Response
27/04/2020	Steve Jones	Meat Processor	User 1 Meat Processor	5/323 (Low Risk)			Awaiting Response
27/04/2020	Steve Jones	Meat Processor	User 1 Meat Processor	5/323 (Low Risk)			Awaiting Response
27/04/2020	Steve Jones	Meat Processor	User 1 Meat Processor	0/0 (Low Risk)			Awaiting Response
21/03/2019	Steve Jones	Salt supplier	Charlotte McLaughlin	77/323 (High risk)	21/03/2019	21/03/2020	Awaiting Review
22/11/2018	Steve Jones	Fruit Supplier	Halle Norman	25/323 (Medium Risk)	12/12/2018	12/12/2020	Confirmed
10/02/2020	Steve Jones	Abattoir 2	User 1 Abattoir 2	10/323 (Low Risk)	10/02/2020	10/02/2021	Confirmed

**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.

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

Questionnaire Status: All  Associated Site: All  Lead Technical: All  Score: All  Recipient Status: All  Search:  Filter

Supplier Type: All  Supplier Status: All  Primary/Secondary: All  High Risk: All  Sort By: Review Date (Ascend) Clear Filters

Delete Selected Request More Info Export To PDF 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](#)

**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*

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

Date Sent Between:   Questionnaire Status: All Associated Site: All Lead Technical: All Score: All Recipient Status: All Search:  Filter

Supplier Type: All Supplier Status: All Primary/Secondary: All High Risk: All Sort By: Review Date (Asc)

Clear Filters

Success - Questionnaire was marked as Confirmed

Delete Selected Request More Info Export To PDF Viewing 50 results | Page 1 of 1

<input type="checkbox"/>	Date Sent	Sent By	Supplier	Sent To	Points	Last Confirmed	Review Date	Status	
<input type="checkbox"/>	10/02/2020	Steve Jones	Customer 1	User 1 Customer 1	0/0 (Low Risk)			Awaiting Response	☰
<input type="checkbox"/>	10/02/2020	Steve Jones	Ingredient Trading Agent	Brad Fielding	0/0 (Low Risk)			Awaiting Response	☰
<input type="checkbox"/>	10/02/2020	Steve Jones	Packaging supplier	Gregory Donaldson	0/0 (Low Risk)			Awaiting Response	☰
<input type="checkbox"/>	10/02/2020	Steve Jones	Transport	User 1 Transport	0/0 (Low Risk)			Awaiting Response	☰
<input type="checkbox"/>	25/04/2020	Steve Jones	Meat Processor	User 1 Meat Processor	15/323 (Low Risk)			Awaiting Response	☰
<input type="checkbox"/>	27/04/2020	Steve Jones	Meat Processor	User 1 Meat Processor	0/0 (Low Risk)			Awaiting Response	☰
<input type="checkbox"/>	27/04/2020	Steve Jones	Meat Processor	User 1 Meat Processor	5/323 (Low Risk)			Awaiting Response	☰
<input type="checkbox"/>	27/04/2020	Steve Jones	Meat Processor	User 1 Meat Processor	5/323 (Low Risk)			Awaiting Response	☰
<input type="checkbox"/>	27/04/2020	Steve Jones	Meat Processor	User 1 Meat Processor	0/0 (Low Risk)			Awaiting Response	☰
<input type="checkbox"/>	22/11/2018	Steve Jones	Fruit Supplier	Halle Norman	25/323 (Medium Risk)	12/12/2018	12/12/2020	Confirmed	☰
<input type="checkbox"/>	10/02/2020	Steve Jones	Abattoir 2	User 1 Abattoir 2	10/323 (Low Risk)	10/02/2020	10/02/2021	Confirmed	☰
<input type="checkbox"/>	10/02/2020	Steve Jones	Abattoir 3	User 1 Abattoir 3	30/323 (Medium Risk)	10/02/2020	10/02/2021	Confirmed	☰
<input type="checkbox"/>	10/02/2020	Steve Jones	Bakery Supplier	Joanne Fox	70/323 (High Risk)	10/02/2020	10/02/2021	Confirmed	☰
<input type="checkbox"/>	10/02/2020	Steve Jones	Cleaning services	Martin Smyth	75/323 (High Risk)	11/02/2020	11/02/2021	Confirmed	☰

View Response

Request More Info

Amend Recipient

Edit Sections Shown

Close & Lock

Confirm

**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**

**Request More Information** ✕

Enter the reason why you are requesting more information on the questionnaire(s):

Respond By Date: 05/05/2020

An email will be sent to *Halle Norman*.

Cancel
Request More Info

**Step 3:** The status reverts to **Awaiting Response**

<input type="checkbox"/>	28/04/2020	Steve Jones	Fruit Supplier	Halle Norman	25/323 (Medium Risk)	12/12/2018	12/12/2020	Awaiting Response	☰
--------------------------	------------	-------------	----------------	--------------	----------------------	------------	------------	-------------------	---

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



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

Between Dates

Supplier

Completed By

Status

Supplier Type

[Filter](#)

[Clear Filters](#)

Wifful acts of abuse

Any Sensible animals dragged

[Delete Selected](#) [View Selected](#) [Lock Selected](#)

<input type="checkbox"/>	Date Completed	Supplier	Wifful acts of abuse	Any Sensible animals dragged	Completed By	Shared With	Points (Score Rating)	Respond By Date	Open Issues	Status
<input type="checkbox"/>	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

Date Sent Between

Questionnaire Status

Associated Site

Lead Technical

Score

Recipient Status

Search

[Filter](#)

[Clear Filters](#)

Supplier Type

Supplier Status

Primary/Secondary

High Risk

Sort By

[Delete Selected](#) [Request More Info](#) [Export To PDF](#)

Viewing 50 results | Page 1 of 1

<input type="checkbox"/>	Date Sent	Sent By	Supplier	Sent To	Points	Last Confirmed	Review Date	Status
<input type="checkbox"/>	10/02/2020	Steve Jones	Customer 1	User 1 Customer 1	0/0 (Low Risk)			Awaiting Response
<input type="checkbox"/>	10/02/2020	Steve Jones	Ingredient Trading Agent	Brad Fielding	0/0 (Low Risk)			Awaiting Response
<input type="checkbox"/>	10/02/2020	Steve Jones	Packaging supplier	Gregory Donaldson	0/0 (Low Risk)			Awaiting Response
<input type="checkbox"/>	10/02/2020	Steve Jones	Transport	User 1 Transport	0/0 (Low Risk)			Awaiting Response
<input type="checkbox"/>	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**

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

Date Sent Between:   Filter

Questionnaire Status: All ▼    Associated Site: All ▼    Lead Technical: All ▼    Score: All ▼    Recipient Status: All ▼    Search:  Filter

Supplier Type: All ▼    Supplier Status: All ▼    Primary/Secondary: All ▼    High Risk: All ▼    Sort By: Review Date (Asc) Clear Filters

Delete Selected Request More Info Export To PDF Viewing 50 results | Page 1 of 1

<input type="checkbox"/>	Date Sent	Sent By	Supplier	Sent To	Points	Last Confirmed	Review Date	Status	
<input type="checkbox"/>	10/02/2020	Steve Jones	Customer 1	User 1 Customer 1	0/0 (Low Risk)			Awaiting Response	<span>View Response</span>
<input type="checkbox"/>	10/02/2020	Steve Jones	Ingredient Trading Agent	Brad Fielding	0/0 (Low Risk)			Awaiting Response	<span>Request More Info</span>
<input type="checkbox"/>	10/02/2020	Steve Jones	Packaging supplier	Gregory Donaldson	0/0 (Low Risk)			Awaiting Response	<span>Amend Recipient</span>
<input type="checkbox"/>	10/02/2020	Steve Jones	Transport	User 1 Transport	0/0 (Low Risk)			Awaiting Response	<span>Edit Sections Shown</span>
<input type="checkbox"/>	25/04/2020	Steve Jones	Meat Processor	User 1 Meat Processor	15/323 (Low Risk)			Awaiting Response	<span>Close &amp; Lock</span>

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

Close & Lock Questionnaire ✕

ⓘ Closing a questionnaire stops the automatic review process and means the supplier will not be able to update their response with any changes.  
If this is an active supplier, please consider using the 'Confirmed' option.

Enter an optional note:

Cancel 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

**Questionnaire Manager**

← Received Questionnaires | Activity Overview | Reports ▾

Date Sent Between: [ ] [ ]  
Sent By: All ▾  
Sent To: All ▾  
Site: All Sites ▾  
Status: All ▾  
Sort By: Respond By Date (I▾)  
Search: Search... [Filter] [Clear Filters]

Sort by filter have the following options.

Sort By: Respond By Date (I▾) Search: Search...

Search

- Respond By Date (Descending)
- Respond By Date (Ascending)
- Date Sent (Descending)
- Date Sent (Ascending)

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.

Title: Enter a title...

Questionnaire Type: -- Select Type -- ▾

Questionnaire In Use: Yes ▾

Requires Review: No ▾

Confidential Share: No ▾ (if yes - only the person this questionnaire is shared with can view it)

Limit Internal Visibility: No ▾ (if yes - this questionnaire is only visible to selected users shown, otherwise visible to all)

**Enable Bulk Close: On  (Enables questionnaires associated with this template to be bulk closed)**

Associated Questionnaire: -- None -- ▾ (enables using fields from the associated questionnaire to based visibility/required conditions on)

Enabling this functionality, when clicking “Review Responses” 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*

	Created by	Review Frequency	Type	In Use	Status	
Questionnaire Lamb	Tesco Admin			No	2041 Sent	☰
Questionnaire Lamb - Baseline Data	Tesco Admin		Commercial	No	350 Sent	☰
Questionnaire Lamb Benchmark Data	Tesco Admin			Yes	353 Sent	☰
Questionnaire Lamb Tier 2	Tesco Admin			No	211 Sent	☰
Questionnaire Lamb Plan	Tesco Admin			Yes	89 Sent	☰
Questionnaire Lamb Data	Tesco Admin			Yes	270 Sent	☰
Questionnaire Lamb Tier 1	Tesco Admin			No	136 Sent	☰
Questionnaire Lamb : Processor Template	Tesco Admin			No	7 Sent	☰
Questionnaire Lamb Point Survey	Tesco Admin			Yes	1 Sent	☰
Questionnaire Lamb Table Farming Group - Potatoes QVIS Scorecard	Tesco Admin			Yes	3 Sent	☰
Questionnaire Lamb Tier 1 Monthly	Tesco Admin			No	1 Sent	☰



- View Responses
- Completed Comparison Report**
- Completed Snapshot Report
- Edit Details
- Edit Questionnaire
- Edit Confirmation Template
- Preview
- View Edit History
- Send to Suppliers
- Send to Individuals

**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](#)

[Back](#) [Generate Report](#)

<input type="checkbox"/>	Section	Field
<input type="checkbox"/>	1. Introduction	What type of product do you supply?
<input type="checkbox"/>	1. Introduction	Company background
<input type="checkbox"/>	1. Introduction	Organisational Chart
<input type="checkbox"/>	1. Introduction	Management structure
<input type="checkbox"/>	1. Introduction	Do source any material from Russia?
<input type="checkbox"/>	1. Introduction	Do you source from China?
<input type="checkbox"/>	2. Supplier Details	Location
<input checked="" type="checkbox"/>	2. Supplier Details	Current BRC Grade
<input type="checkbox"/>	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

**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

The screenshot shows the 'Questionnaire Manager' interface. At the top, there is a navigation bar with 'News & Statistics', 'Supplier Approval', 'Quality Management', 'Trading & Planning', 'More', and 'User 1'. Below this, the 'Questionnaire Manager' header is visible, with 'Received Questionnaires' selected and highlighted with a red box. The main area contains filter controls for 'Date Sent Between', 'Site' (set to 'All Sites'), 'Questionnaire' (set to 'All Templates'), 'Sent By' (set to 'All'), 'Sent To' (set to 'All'), 'Status' (set to 'All'), 'Sort By' (set to 'Respond By Dat'), and a 'Search' field. A 'Filter' button and a 'Clear Filters' button are also present. Below the filters, there is a 'Received Comparison Report' dropdown. The main content area shows 'Viewing 13 results. Page 1 of 1' and a table of results. The table has columns for 'Date Sent', 'Site', 'Title', 'Sent By', 'Sent To', 'Review', 'Respond By', and 'Status'. One row is visible with the following data: Date Sent: 15/03/22 15:11, Site: Abattoir 1, Title: Baseline & Environmental Questionnaire, Sent By: Steve Jones, Sent To: User 1 Abattoir, Review: (empty), Respond By: 29/03/2022, Status: Requires Your. A 'Respond' button is next to the 'Requires Your' status.

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

This screenshot is similar to the previous one, but the 'Questionnaire' filter dropdown menu is open. The dropdown menu has a search bar and a list of options. 'All templates' is highlighted with a red box. Below it, 'Baseline & Environmental Questionnaire' and 'BRG New Supplier Assessment Questionnaire' are visible. The rest of the interface, including the navigation bar and the table of results, remains the same as in the previous screenshot.

### Step 2: Click *Filter*

**Questionnaire Manager**

← Received Questionnaires | Activity Overview | Reports ▾

Date Sent Between: [ ] [ ] Site: All Sites Questionnaire: All Templates Sent By: All Sent To: All Status: All Sort By: Respond By Date Search: Search... **Filter** Clear Filters

Received Comparison Report ▾

Viewing 13 results. Page 1 of 1

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

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

**Questionnaire Manager**

← Received Questionnaires | Activity Overview | Reports ▾

Date Sent Between: [ ] [ ] Site: All Sites Questionnaire: Baseline & Envir Sent By: All Sent To: All Status: All Sort By: Respond By Date Search: Search... Filter Clear Filters

Received Comparison Report ▾

Viewing 2 results. Page 1 of 1

<input type="checkbox"/>	Date Sent	Site	Title	Sent By	Sent To	Review	Respond By	Status	
<input type="checkbox"/>	15/03/22 15:11	Abattoir 1	Baseline & Environmental Questionnaire	Steve Jones Democo	User 1 Abattoir		29/03/2022	Requires Your Action	<a href="#">→ Respond</a> <a href="#">View</a>
<input type="checkbox"/>	15/03/22 15:11	Abattoir 1	Baseline & Environmental Questionnaire	Steve Jones Democo	User 1 Abattoir		29/03/2022	Requires Your Action	<a href="#">→ Respond</a> <a href="#">View</a>

Viewing 2 results. Page 1 of 1

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

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

**Questionnaire Manager**

← Received Questionnaires Activity Overview Reports

Date Sent Between Site Questionnaire Sent By Sent To Status Sort By Search

15/03/22 15:11 All Sites Baseline & Envir All All All Respond By Date Search... Filter Clear Filters

Received Comparison Report

Viewing 2 results. Page 1 of 1 25 50 100 All | << first < previous next > last >>

<input type="checkbox"/>	Date Sent	Site	Title	Sent By	Sent To	Review	Respond By	Status	
<input type="checkbox"/>	15/03/22 15:11	Abattoir 1	Baseline & Environmental Questionnaire	Steve Jones Democo	User 1 Abattoir		29/03/2022	Requires Your Action	Respond View
<input type="checkbox"/>	15/03/22 15:11	Abattoir 1	Baseline & Environmental Questionnaire	Steve Jones Democo	User 1 Abattoir		29/03/2022	Requires Your Action	Respond View

Viewing 2 results. Page 1 of 1 25 50 100 All | << first < previous next > last >>

**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*.

**Questionnaire Manager**

← Received Questionnaires Activity Overview Reports

Date Sent Between Site Questionnaire Sent By Sent To Status Sort By Search

15/03/22 15:11 All Sites Baseline & Envir All All All Respond By Date Search... Filter Clear Filters

Received Comparison Report

Selected Questionnaires All Questionnaires

Viewing 2 results. Page 1 of 1 25 50 100 All | << first < previous next > last >>

<input type="checkbox"/>	Date Sent	Site	Title	Sent By	Sent To	Review	Respond By	Status	
<input type="checkbox"/>	15/03/22 15:11	Abattoir 1	Baseline & Environmental Questionnaire	Steve Jones Democo	User 1 Abattoir		29/03/2022	Requires Your Action	Respond View

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

Generated By: Rob Phelps  
Date Generated: 16/03/2022 02:39:45

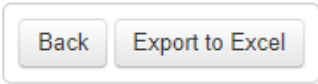
Questionnaire Details	Test - Contract test	Section 1 - Question 1	Section 1 - Question 2	Section 1 - Question 3
28/10/2021 - Fresh Food Supplies (John Smith)		2	3	3
28/10/2021 - Fresh Food Supplies (John Smith)		1	1	1
28/10/2021 - Fresh Food Supplies (John Smith)		2	4	3
28/10/2021 - Fresh Food Supplies (John Smith)		1	4	1

Generated by foodconnected.com

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







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**

Review Frequency	Type	In Use	Status	
	Cost of Production Lamb	Yes	0 Sent	
	Cost of Production Lamb			
1 Year	Cost of Production Lamb			
	Cost of Production Lamb			
	Cost of Production Lamb			
	Cost of Production Lamb			
	Cost of Production Lamb			
	Cost of Production Lamb			
	Cost of Production Lamb			
1 Year	Cost of Production Lamb	yes	347 Sent	

- View Responses
- Completed Comparison Report
- Completed Snapshot Report**
- Edit Details
- Edit Questionnaire
- Edit Confirmation Template
- Preview
- View Edit History
- Send to Suppliers
- Send to Individuals

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

Supplier Options

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



**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%

Back To... Amend Parameters Save As...  
New Widget

Widget Title: Flock Information - How many different types of anti

Widget Site: [Dropdown]

Widget Access Level: All Users [Dropdown]

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

[Empty Input Field]

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