

# TOOL USER GUIDE

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## INTERNAL DOCUMENT MANAGER

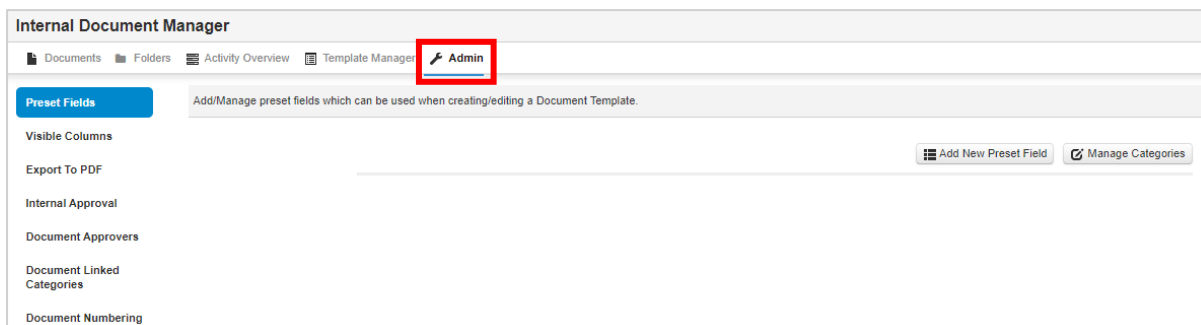


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## 1. INITIAL SETUP FOR INTERNAL DOCUMENTS

These are admin settings you may want to adjust and set up based off your preferences. You will find them under the **Admin** section of **Internal Document Manager**.



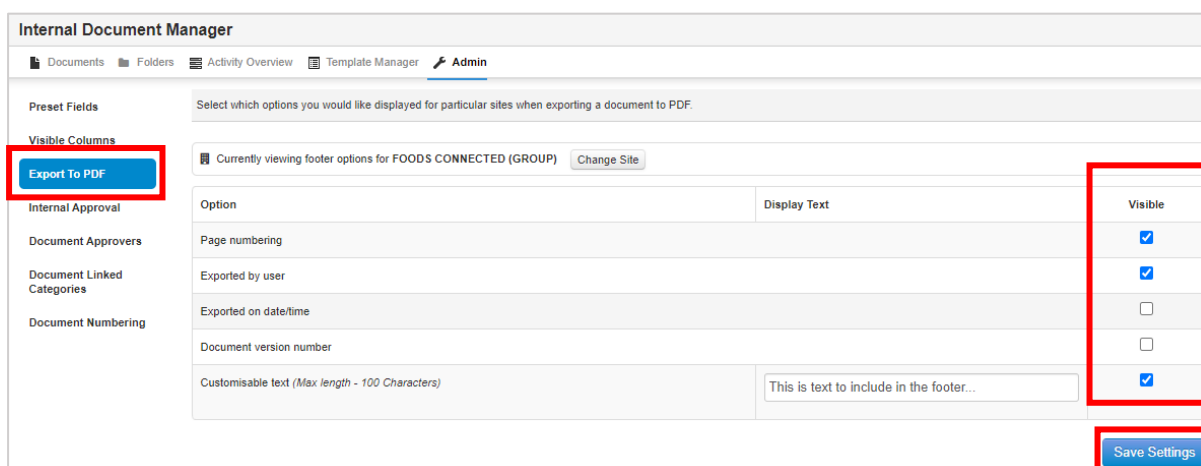
### 1.1 EXPORT TO PDF

**Step 1:** Select *Export to PDF*

**Step 2:** Select which site you want this to apply to by clicking on the **Change Site** button.  
(Each site can have its own setup)

**Step 3:** Select the relevant options you want displayed for exporting to PDF. You can include custom text if applicable.

**Step 4:** Click on **Save Settings** to save the selected setup.

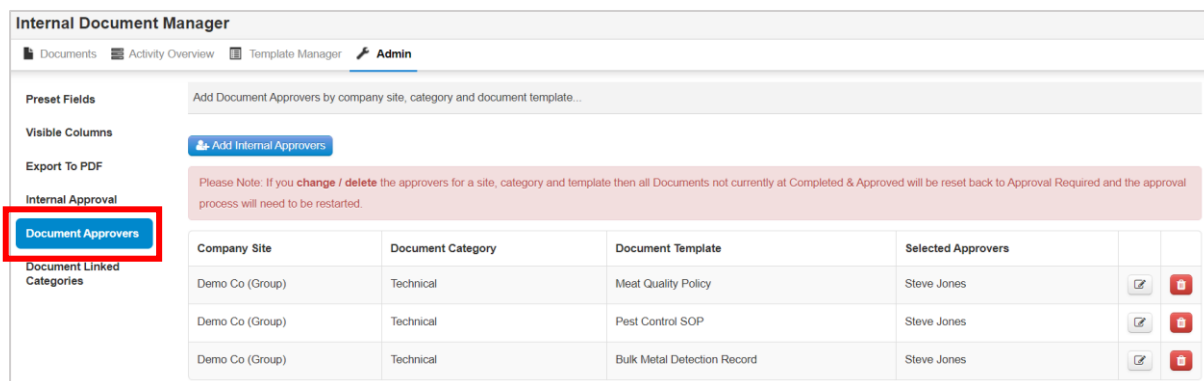


### 1.2 DOCUMENT APPROVERS

Here you can add **Internal Approvers** by **Company Site**, **Document Category** or **Document Template**.

**Step 1:** Select *Document Approvers*.

**Step 2:** Click on **Add Internal Approvers**.



**Internal Document Manager**

Documents Activity Overview Template Manager Admin

Preset Fields Add Document Approvers by company site, category and document template...

Visible Columns Add Internal Approvers

Export To PDF

Internal Approval

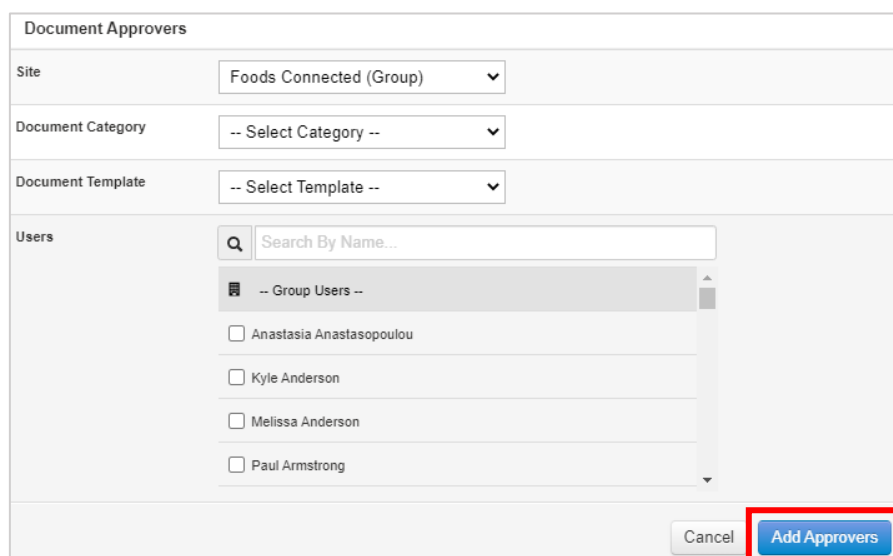
**Document Approvers**

Document Linked Categories

Please Note: If you **change / delete** the approvers for a site, category and template then all Documents not currently at Completed & Approved will be reset back to Approval Required and the approval process will need to be restarted.

Company Site	Document Category	Document Template	Selected Approvers		
Demo Co (Group)	Technical	Meat Quality Policy	Steve Jones		
Demo Co (Group)	Technical	Pest Control SOP	Steve Jones		
Demo Co (Group)	Technical	Bulk Metal Detection Record	Steve Jones		

**Step 3:** Select the applicable options for the approvers, you can have different approvers for different categories/templates as needed. Click on **Add Approvers** once you are happy with the selected settings.



**Document Approvers**

Site Foods Connected (Group) ▼

Document Category -- Select Category -- ▼

Document Template -- Select Template -- ▼

Users

Search By Name...

-- Group Users --

☐ Anastasia Anastasopoulou

☐ Kyle Anderson

☐ Melissa Anderson

☐ Paul Armstrong

Cancel Add Approvers

**Step 4:** You can edit or delete approvers from this page as well.

**Internal Document Manager**

Documents Activity Overview Template Manager **Admin**

**Preset Fields** Add Document Approvers by company site, category and document template...

**Visible Columns** [Add Internal Approvers](#)

**Export To PDF**

**Internal Approval**

**Document Approvers**

**Document Linked Categories**

Please Note: If you **change / delete** the approvers for a site, category and template then all Documents not currently at Completed & Approved will be reset back to Approval Required and the approval process will need to be restarted.

Company Site	Document Category	Document Template	Selected Approvers
Demo Co (Group)	Technical	Meat Quality Policy	Steve Jones
Demo Co (Group)	Technical	Pest Control SOP	Steve Jones
Demo Co (Group)	Technical	Bulk Metal Detection Record	Steve Jones

### 1.3 DOCUMENT LINKED CATEGORIES

When you select **Document Linked Categories**, you can set up Categories and Subcategories. This will allow you to categorise your Internal Documents and the options you set up will be available to filter by. There is currently one list of categories for all sites so if making changes, ensure you are not changing categories being used by another site. These categories are separate to the folder functionality so they can be used independently.

**Step 1:** Click on the menu buttons beside the category and sub-category fields to add options to them.

**Internal Document Manager**

Documents Activity Overview Template Manager **Admin**

**Preset Fields** Set primary and secondary document categories

**Visible Columns**

**Export To PDF**

**Internal Approval**

**Document Approvers**

**Document Linked Categories**

Field Display Name

Category Name

Sub Category Name Internal Document

Save Settings

**Step 2:** Go to the **Add New Categories** tab of the pop-up window to add in options.

**Category Manager**

Current Categories **Add New Categories**

Enter the names of the categories you would like to use.

Category Name

Parents Children

☐ Boning Hall

☐ Slaughter Hal

☐ Boning Hall

☐ Slaughter Hal

Cancel **Add/Update Categories**

**Step 3:** Type in the category names and click on **Add/Update Categories** to save them.

**Step 4:** To link categories and sub-categories together, in the **Current Categories** tab, tick the checkboxes in the 'Parent(s)' column. You can also edit and delete categories from this tab, remembering to click on **Add/Update Categories** when any changes are made.

Category Manager

Current Categories Add New Categories

Below are the current document categories available for you to use. Please note deleting or editing a category will affect any documents that are currently linked to that category.

Delete Selected

Category Name	Parent (s)	Children
<input type="checkbox"/> Bonning Hall	<input type="checkbox"/> Technical <input type="checkbox"/> Commercial <input checked="" type="checkbox"/> Health & Safety <input type="checkbox"/> Quality	
<input type="checkbox"/> Slaughter Hall	<input type="checkbox"/> Technical <input type="checkbox"/> Commercial <input checked="" type="checkbox"/> Health & Safety <input type="checkbox"/> Quality	

Cancel Add/Update Categories

## 1.4 DOCUMENT NUMBERING

Document numbering can be set at an individual site level, by default this will be set to 'N/A' but if it is applicable for your site, you have two options. The first option is 'Manual Entry', this will give a free textbox in the details of each document to manually enter a document number. The second option is 'Auto-generated', when switched on this will give each document a number automatically starting from 1000 for the first created document and ascending for each new document.

When switched on both options will show in a 'Document Number' column, and you will be able to search for the number in the search box. Numbers and letters are accepted in the document number field for the manual entry.

**Step 1:** Select **Document Numbering**

**Step 2:** Select which site you want this to apply to by clicking on the site dropdown. (Each site can have its own setup)

**Step 3:** Select the relevant option you want to use.

**Step 4:** Click on **Save Settings** to save the selected setup.

**Internal Document Manager**

Documents Folders Activity Overview Template Manager **Admin**

Preset Fields: Sales & Marketing Department

Visible Columns: Setting

Export To PDF: Document Numbers

Internal Approval: N/A - Document numbering will not be enabled

Document Approvers: Manual Entry - A document number must be manually entered on document creation

Document Linked Categories: Auto-generated - A document number will be automatically generated by Foods Connected

**Document Numbering**

Option

☐ N/A

☒ Manual Entry

☐ Auto-generated

**Save Settings**

## 2. ADDING INTERNAL DOCUMENTS

There are two ways to add an Internal Document, either by using a template to have a consistent format to your documents, or by uploading an existing file.

### 2.1 CREATING A DOCUMENT TEMPLATE

If using the template option, you would first create your template to be able to create document using it.

Select **Template Manager**, then **Add Form Template** and then set up your template for the Document using Form builder. This would include all the fields that you would need for inputting the content of your document.

**Internal Document Manager**

Documents Activity Overview **Template Manager** Admin

**Add Form Template** Delist Selected Activate Selected Duplicate Template

<input type="checkbox"/>	Last Updated	Template Name	Created By	Status	
<input type="checkbox"/>	08/04/2016 13:28:31	BRC - Global Standard Food Safety - Issue 7	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	15/08/2019 11:05:22	Bulk Metal Detection Record	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	03/12/2018 12:11:40	Bulk Metal Detection Record - (SITE 3 ONLY)	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	23/11/2018 12:11:59	Glass and Hard Plastics SOP	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	29/08/2019 09:35:42	Health & Safety SOP	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	15/11/2018 14:41:53	Meat Quality Policy	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	03/12/2018 12:11:25	Meat Quality Policy - (SITE 2 ONLY)	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	15/11/2018 14:58:08	Pest Control SOP	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	05/11/2019 12:06:47	Use of Heat Treatments as a Process Control	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	23/11/2018 10:14:40	Glass and Hard Plastics SOP - Copy	Steve Jones	Inactive	Preview Update Edit History Settings

### 2.2 CREATING AN INTERNAL DOCUMENT USING A TEMPLATE

**Step 1:** From the **Documents** or **Folders** tabs, select **New Document** and then **Form Template**.

**Internal Document Manager**

Documents Folders Activity Overview Template Manager Admin

Site: All Created By: All Status: All Category: All Sub Category: All Sort By: Last Updated (D Search: policy Filter Clear Filters

New Document Form Template Upload File Delete Selected View Selected Comparison Tool 25 50 100 All << first < previous next > last >>

		Document Name	Document Category	Document Sub Category	Version	Status	
<input type="checkbox"/>	22/01/2022 02:32:17	Food Safety and Quality Policy	Technical	Standards	1	Completed & Approved	
<input type="checkbox"/>	08/04/2022 11:32:01	Food Safety and Quality Policy	Technical	Standards	1	In Progress	
<input type="checkbox"/>	06/04/2022 10:18:16	DG - Food Safety and Quality Policy	Technical	Standards	1	Completed & Approved	
<input type="checkbox"/>	06/10/2021 14:33:51	ESG Policy	Technical	Standards	1.1	Completed & Approved	
<input type="checkbox"/>	17/12/2020 08:07:15	Delivery Policy	Home Delivery	Standards	1	Completed & Approved	
<input type="checkbox"/>	13/02/2020 13:40:09	Supplier audit Meat Quality Policy	Technical	Auditing	1	Completed & Approved	

**Step 2:** Select the relevant details for your Internal Document.



**Internal Document Manager - Add a Document**

**Document Details**

Site	Sales & Marketing Department	1. Select your document site
Select Template	SOP Template	2. Select your template.
Document Name	<input type="text"/>	3. Input your document name.
Document Number	<input type="text"/>	4. Input your document number.
Document Category	-- Select Category --	5. Select your document category (if there is a linked sub-category to your selected category, this will open as an option)

**Notify Additional Users/Teams**

Site	Team/User	Notification Type
There are currently no users set up to receive notifications for this document. Use the plus sign above to add users/teams.		

Set Document As Confidential ☐ No

Enable Review Period ☐ No

Cancel Save Save & Build Document

**Step 3:**

If you would like to notify users about changes or new approvals to the document, click on the plus button and a pop-up window will open. Select your options and click on **Add User(s)** to save notification.

**Notify Additional Users/Teams**

Site	Team/User	Notification Type
There are currently no users set up to receive notifications for this document. Use the plus sign above to add users/teams.		

**Notify Additional Users/Teams**

<input type="checkbox"/>	Site	Team/User	Notification Type
<input type="checkbox"/>	Foods Connected (Group)	Bethany McDowell	On document change and approval

Delete Selected

On Document Change  
On Document Approval  
On Document Change and Approval

-- Group Teams --

☐ Anastasia's Team

☐ animal welfare

☐ Audit Team

☐ Bethany's Team

Cancel Add User(s)

Once you have notifications added on, you can also delete or edit them from this page.

**Step 4:** If applicable, you can set the document to confidential and limit access to selected users. \*Once a document moves past version 1, you will also have the option to remove access of previous versions for users\*.

Set Document As Confidential ☐ Yes



Limit To

Search by Name...

-- Sales & Marketing Department Users --

☐ Roger McCracken

**Step 5:** If you would like to have a review period set, you can set the start and expiry date as well as the frequency. From the approval date of the document, the system will update the document to 'Requires Review' once the set review period is reached.

Enable Review Period	<input checked="" type="checkbox"/> Yes
Start Date	<input type="text"/> 
Expiry Date	<input type="text"/> 
Review Period Frequency	<input checked="" type="radio"/> Day <input type="radio"/> Week <input type="radio"/> Two Weeks <input type="radio"/> Three Weeks <input type="radio"/> Four Weeks <input type="radio"/> Month <input type="radio"/> Three Months <input type="radio"/> Six Months <input type="radio"/> Year <input type="radio"/> Two Years <input type="radio"/> Three Years

**Step 6:** Once you are happy with your setup, click on **Save and Build Document** to open the template.

**Step 7:** Build your document filling in the required detail on the template. Any fields that you do not need, simply don't fill any details in and they won't appear on the document.

**Step 8:** Once you have completed your document, select **Save & Exit**. If you have **Internal Approvers** set up, (see Section 1.2) then you will need to request approval and update the status. If no internal approval is required, then the status can be updated to **Completed & Approved**.

## 2.3 UPLOADING A FILE

**Step 1:** Select **Documents** or **Folders**, then **New Document** and then **Upload File**.

**Internal Document Manager**

Documents Folders Activity Overview Template Manager Admin

Site: All Created By: All Status: All Category: All Sub Category: All Sort By: Last Updated (D) Search: policy Filter Clear Filters

New Document Form Template Upload File Delete Selected View Selected Comparison Tool 25 50 100 All << first < previous next > last >>

	Document Name	Document Category	Document Sub Category	Version	Status	
<input type="checkbox"/>	22/07/2022 02:32:17 Food Safety and Quality Policy	Technical	Standards	1	Completed & Approved	
<input type="checkbox"/>	08/04/2022 11:32:01 Food Safety and Quality Policy	Technical	Standards	1	In Progress	
<input type="checkbox"/>	06/04/2022 10:18:16 DG - Food Safety and Quality Policy	Technical	Standards	1	Completed & Approved	
<input type="checkbox"/>	06/10/2021 14:33:51 ESG Policy	Technical	Standards	1.1	Completed & Approved	
<input type="checkbox"/>	17/12/2020 08:07:15 Delivery Policy	Home Delivery	Standards	1	Completed & Approved	
<input type="checkbox"/>	13/02/2020 13:40:09 Supplier audit Meat Quality Policy	Technical	Auditing	1	Completed & Approved	

**Step 2:** Follow the steps 2-5 from section 2.2 but this time upload a file rather than selecting a template.

**Internal Document Manager - Add a Document**

Document Details

Site: Foods Connected (Group)

Select File (Max File Size = 40MB): Click to select document Click here to upload the file

Document Name:

Document Number: 1018

Document Category: -- Select Category --

Notify Additional Users/Teams

Site: Team/User: Notification Type: +

There are currently no users set up to receive notifications for this document. Use the plus sign above to add users/teams.

Set Document As Confidential: No

Enable Review Period: No

Cancel Save

**Step 3:** Once you have uploaded your file, select **Save**. If you have **Internal Approvers** set up, (see Section 1.2) then you will need to request approval and update the status. If no internal approval is required, then the status can be updated to **Completed & Approved**.

## 2.4 DUPLICATING A DOCUMENT

If you are using the template option, you can duplicate documents from the menu button beside the document you would like to copy. This will copy all the content you have input into the initial document, but you can make any amends as required.

**Internal Document Manager**

Documents | Activity Overview | Template Manager | Admin

Site: All | Created By: All | Status: All | Category: All | Sub Category: All | Sort By: Last Updated (Desc) | Search: | Filter | Clear Filters

+ New Document | Delete Selected | View Selected | Comparison Tool

Date	Document Name	Document Category	Document Sub Category	Version	Status
12/08/2020 12:44:54	BRC v7 - BRC - Global Standard Food Safety	Technical	Standards	7.1	Completed
12/08/2020 12:44:46	BRC Global Standard for Food Safety - Issue 7 (PDF version)	Technical	Standards		
12/08/2020 12:43:48	Supplier Approval SOP (PDF version)	Technical	Supplier Approval		
12/08/2020 12:43:39	Batch oven cooker & temp SOP (PDF Version)	Technical	CCPs		
12/08/2020 12:43:27	Batch oven cooker & temp SOP	Technical	CCPs		

View Document  
View Document Details  
Edit Details  
Edit Document  
Update Status  
Update Version  
Notify Team Members  
**Duplicate Document**  
& Approved

## 2.5 APPROVING A DOCUMENT

If **Internal Approvers** have been set up (see Section 1.2), and you are one of the approvers, you will receive a task and an email notification when approval for a document has been requested. The e-mail will have a direct link to the relevant document.

**Step 1:** When a document requires your approval, it will have an amber status of 'Approval Required'. Click on the menu button beside the document and select **Update Status** to change the status.

**Internal Document Manager**

Documents | Folders | Activity Overview | Template Manager | Admin

Site: All | Created By: All | Status: Approval Required | Category: All | Sub Category: All | Sort By: Name (Z-A) | Search: | Filter | Clear Filters

+ New Document | Delete Selected | View Selected | Comparison Tool

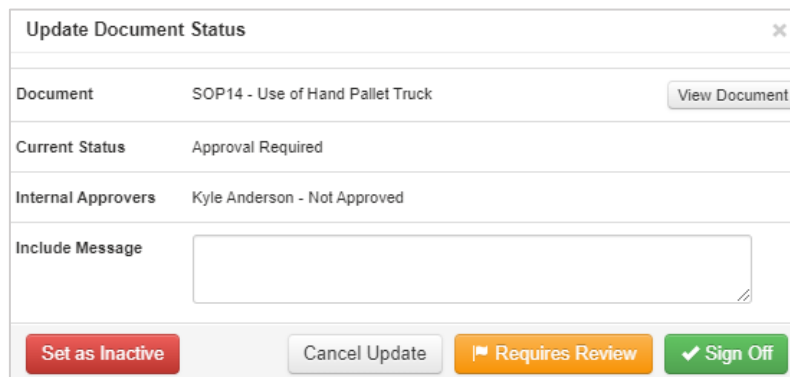
Date	Document Name	Document Number	Document Category	Document Sub Category	Version	Status
09/01/2022 14:34:05	SOP14 - Use of Hand Pallet Truck	1003	Health & Safety	Boning Hall, Slaughter Hall	1	Approval Required
24/01/2022 12:25:58	Food Safety	1008	Technical		3	Approval Required

Viewing 2 results | Page 1 of 1

View Document  
View Document Details  
Edit Details  
Edit Document  
**Update Status**  
Update Version  
Notify Team Members  
Duplicate Document

**FOODS** CONNECTED

**Step 2:** In the pop-up window, you can choose to update the document to **Requires Review** if you are not happy with the document, this will send a notification to the creator, and they will need to re-submit for approval. If you are happy with the document, click on the **Sign Off** button and the document will update to **Completed & Approved**.



The 'Update Document Status' window displays the following information:

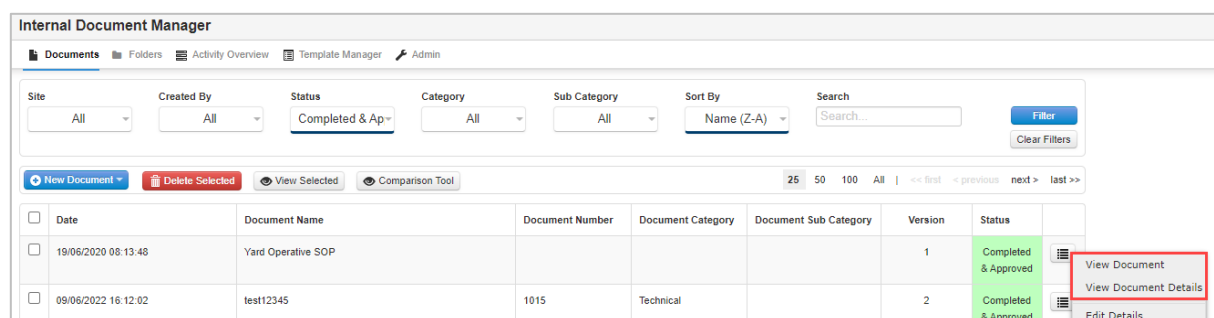
- Document:** SOP14 - Use of Hand Pallet Truck (with a 'View Document' button)
- Current Status:** Approval Required
- Internal Approvers:** Kyle Anderson - Not Approved
- Include Message:** A text input field with a placeholder icon.

At the bottom, there are four buttons: 'Set as Inactive' (red), 'Cancel Update' (grey), 'Requires Review' (orange), and 'Sign Off' (green).

### 3. MANAGING INTERNAL DOCUMENTS

#### 3.1 VIEWING A DOCUMENT

You can view a document and its details from the menu button beside the document.











The 'Internal Document Manager' interface includes a navigation bar with 'Documents', 'Folders', 'Activity Overview', 'Template Manager', and 'Admin'. Below this is a filter section with dropdowns for 'Site' (All), 'Created By' (All), 'Status' (Completed & Ap...), 'Category' (All), 'Sub Category' (All), and 'Sort By' (Name (Z-A)). A search bar and 'Filter' button are also present. Below the filters are buttons for 'New Document', 'Delete Selected', 'View Selected', and 'Comparison Tool'. The main table lists documents with columns: Date, Document Name, Document Number, Document Category, Document Sub Category, Version, Status, and a menu icon. The first two rows are highlighted. The first row shows 'Yard Operative SOP' with status 'Completed & Approved'. The second row shows 'test12345' with status 'Completed & Approved'. A red box highlights the menu icon for the second row, with a tooltip showing 'View Document', 'View Document Details', and 'Edit Details'.

Date	Document Name	Document Number	Document Category	Document Sub Category	Version	Status	
19/06/2020 08:13:48	Yard Operative SOP				1	Completed & Approved	
09/06/2022 16:12:02	test12345	1015	Technical		2	Completed & Approved	<div>View Document</div> <div>View Document Details</div> <div>Edit Details</div>

When viewing a document, you have the option to **Export to PDF**, you can also hide the updates history before exporting if applicable.

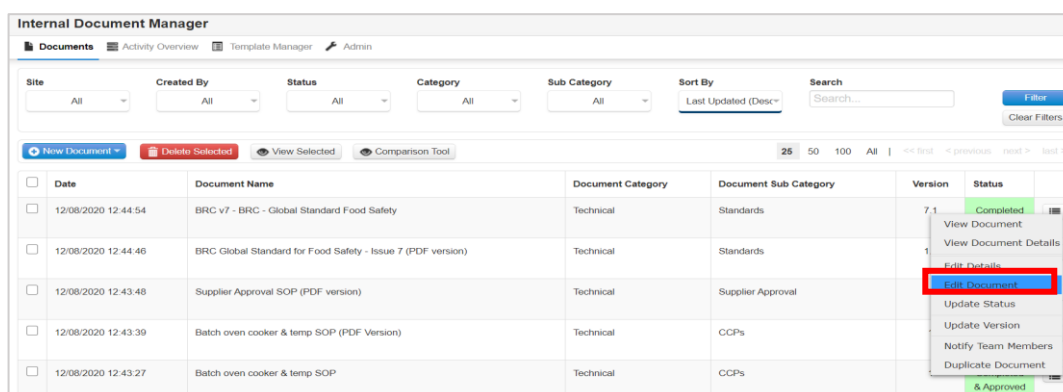


If you have chosen to create an Internal Document using the File Upload function, rather than using the formbuilder functionality, you will be able to click a direct download button to access the attachment without clicking into the document via the menu button.

<input type="checkbox"/>	21/03/2022 09:01:59	SOP Coffee Shop	1034	Health & Safety	Standards	1	Completed & Approved	 
<input type="checkbox"/>	02/03/2022 22:52:46	Weight Control	1028	Technical	Standards, Glass & Hard Plastics SOPs	1	Completed & Approved	 
<input type="checkbox"/>	03/02/2022 01:40:21	Cleaning Program Schedule	1021	Health & Safety	Standards	1	Completed & Approved	 
<input type="checkbox"/>	17/12/2020 08:07:45	Shrimp Farmer Guidance Notes		Home Delivery	Standards	1	Completed & Approved	 

## 3.2 UPDATING A DOCUMENT

**Step 1:** Click on the menu button against the document you want to update, then select **Edit Document**.

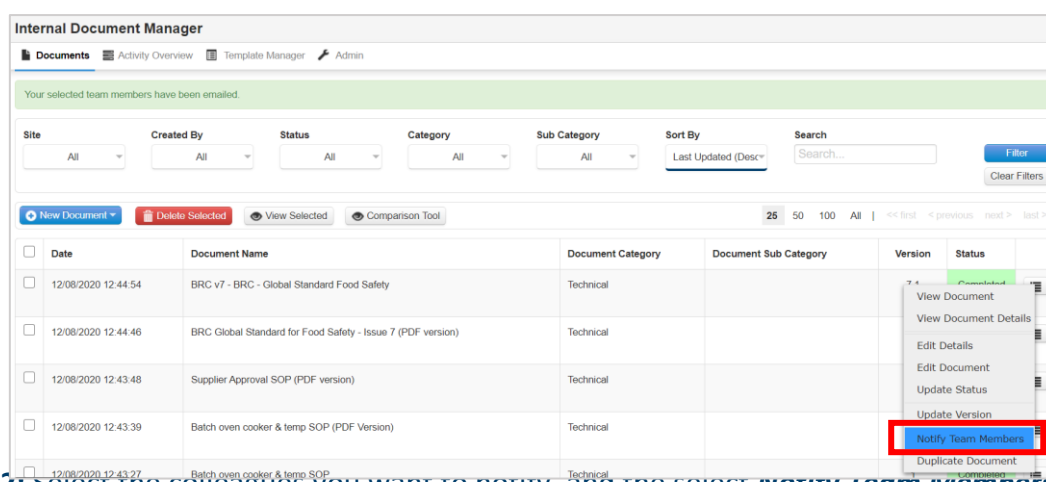


**Step 2:** Make any amendments to the document and then click either **Save** or **Save & Exit**. If you have set up Internal Approvers (see Section 1.2), then approval will be needed for the changes you have made.

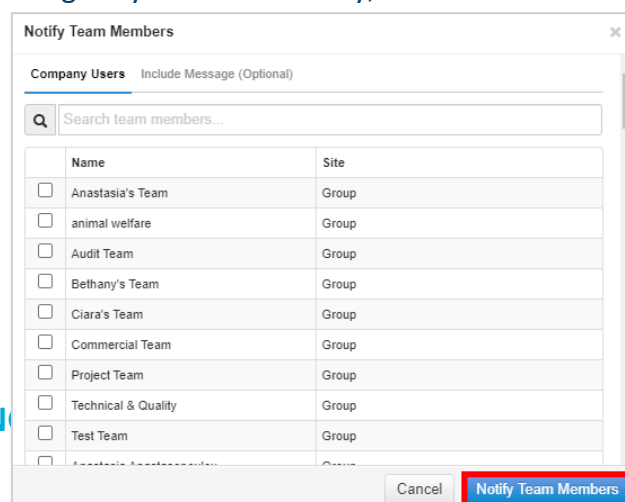
### 3.3 NOTIFYING INTERNAL USERS

Once you have made amendments to a Document, you can notify relevant users within your business. If you have selected Users to be notified when changes are made or a Document is Approved when you set up the Document initially, then they will be automatically notified by e-mail. This option can also be used to manually select *ad hoc* users to notify.

**Step 1:** Click on the menu button against the document you want to notify colleagues about, then select **Notify Team Members**.

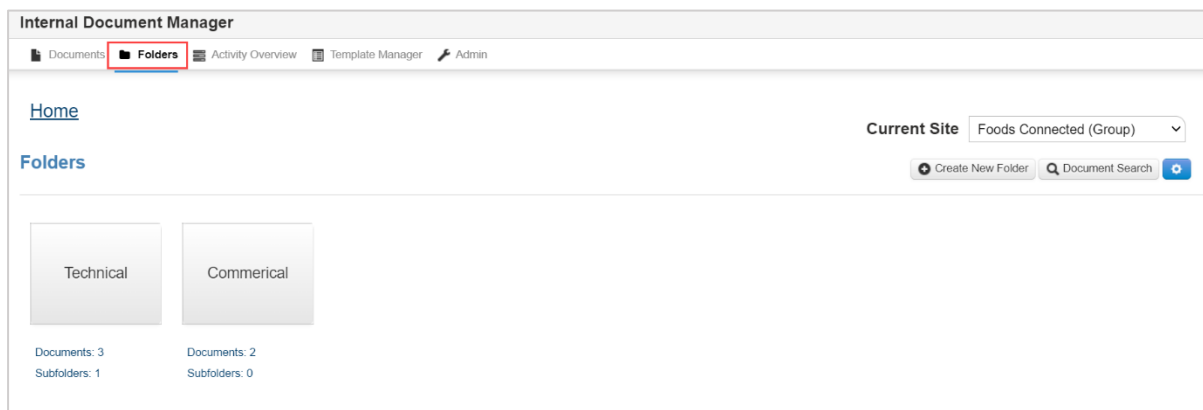


**Step 2:** Select the colleagues you want to notify, and then select **Notify Team Members**.



## 4. MANAGING

There is a separate tab within Internal Document Manager where your documents can be organised within folders, each site can have its own structure.

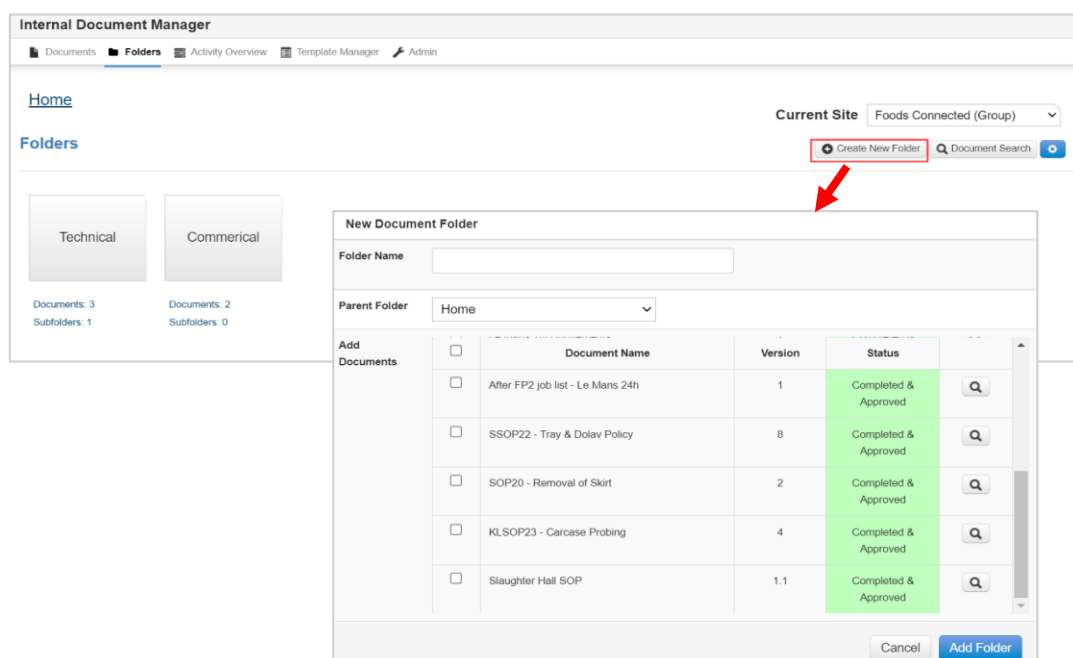


#### 4.1 CREATING A FOLDER

If you would like to have folders and sub-folders, you would first set up your main folder so that you can assign sub-folders within this.

**Step 1:** Click on **Create New Folder** and a pop-up window will open.

**Step 2:** Input your folder name, if this is a sub-folder and you have already created your main folder, select the main folder as the 'Parent Folder'. Then select which documents you would like to include in this folder. Click on **Add Folder** to save the changes made.





When you start to add folders for your site, they will display on the main folders homepage with detail of how many documents and subfolders are stored within them. You will also be able to see which documents haven't been assigned to a folder.

**Internal Document Manager**

Documents Folders Activity Overview Template Manager Admin

[Home](#)

Current Site: Foods Connected (Group)

Create New Folder Document Search

Technical  
Documents: 3  
Subfolders: 1

Commerical  
Documents: 2  
Subfolders: 0

**Unassigned Documents**

Created By: All Status: All Document Category: All Document Sub Category: All Search... Filter Clear Filters

Move selected to...

<input type="checkbox"/>	Date	Document Name	Document Number	Document Category	Document Sub Category	Version	Status	
<input type="checkbox"/>	09/06/2022 16:12:02	test12345	1015	Technical		2	Completed & Approved	

When you click on one of the folders, you will be able to see which documents are stored within this folder as well as any sub-folders.

**Internal Document Manager**

Documents Folders Activity Overview Template Manager Admin

[Home](#) / [Technical](#)

Current Site: Foods Connected (Group)

Create New Folder Document Search

Sub Technical  
Documents: 1  
Subfolders: 1

Previous Level

**Technical Documents**

Created By: All Status: All Document Category: All Document Sub Category: All Search... Filter Clear Filters

Move selected to...

<input type="checkbox"/>	Date	Document Name	Document Number	Document Category	Document Sub Category	Version	Status	
<input type="checkbox"/>	10/06/2022 09:31:02	Ciara Test 10.06	1017	Technical		3	Completed & Approved	

## 4.2 ASSIGNING AN UNASSIGNED DOCUMENT TO A FOLDER

From the main folder homepage, you will see the documents that haven't been assigned to a folder. To assign them to an already created folder, tick the checkboxes of the relevant documents and click on **Move selected to** and choose which folder they should be moved to.

Unassigned Documents

Created By

All

Status

All

Document Category

All

Document Sub Category

All

Search...

Filter

Clear Filters

Move selected to...

Technical

Sub Technical

Sub Sub

Commerical

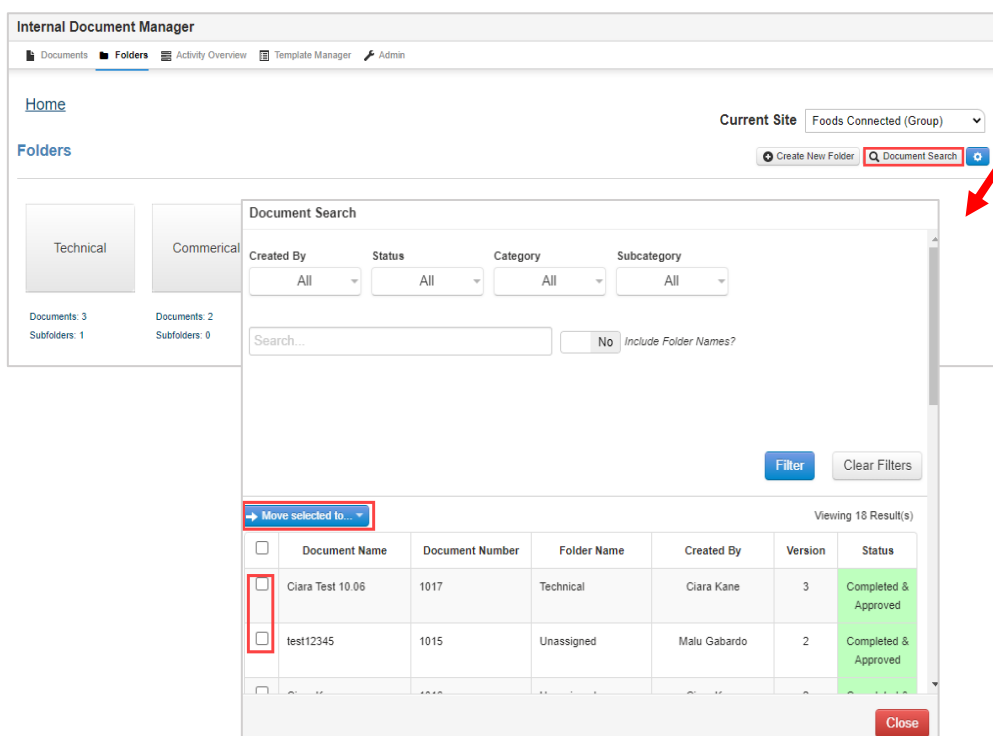
		Document Name	Document Number	Document Category	Document Sub Category	Version	Status	
		345	1015	Technical		2	Completed & Approved	
<input type="checkbox"/>	11/05/2022 16:00:12	Clara K	1016	Technical		2	Completed & Approved	
<input checked="" type="checkbox"/>	24/01/2022 12:25:58	Food Safety	1008	Technical		3	Approval Required	
<input type="checkbox"/>	17/01/2022 11:33:38	Bethany Test 3		Quality		1	In Progress	
<input checked="" type="checkbox"/>	09/01/2022 14:34:05	SOP14 - Use of Hand Pallet Truck	1003	Health & Safety	Boning Hall, Slaughter Hall	1	Approval Required	

## 4.3 USING THE DOCUMENT SEARCH OPTION TO MOVE DOCUMENTS IN BULK

From the main folder homepage, you will see a **Document Search** button. This allows you to find documents from within folders and the unassigned document list that you would like to move to another folder.

**Step 1:** Click on the **Document Search** button and a pop-up window will open. Search for the document(s) you would like to move.

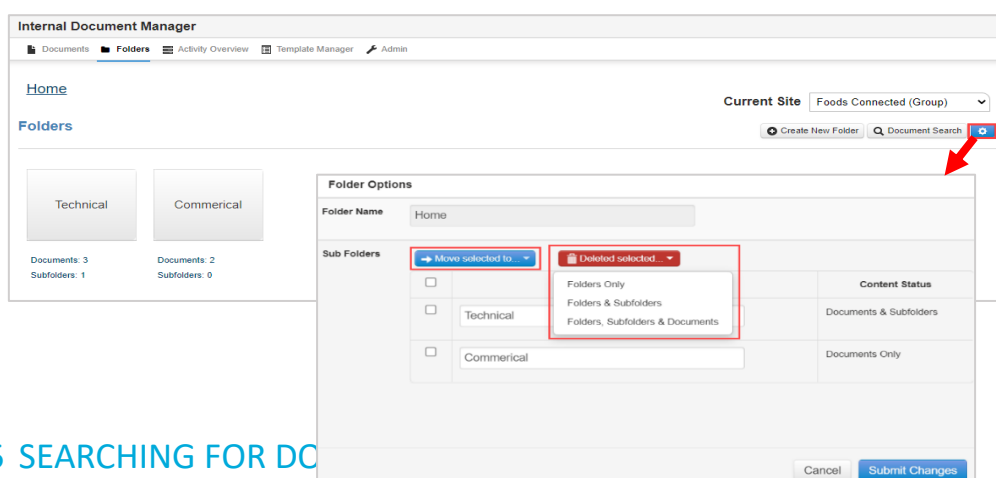
**Step 2:** Use the filters at the top to find the documents you would like to move, then tick the checkboxes beside the relevant documents and use the **Move Selected to** button to choose which folder to move the documents to.



#### 4.4 REARRANGING SUBFOLDERS AND DELETING FOLDERS

**Step 1:** Click on the cog button to open up the folder options window.

**Step 2:** Here you can tick the checkboxes of the folders to move them to sit under other folders using the **Move Selected to** button. Or you can tick the checkbox of a folder that you would like to delete with three different options of what you will be deleting.



#### 4.5 SEARCHING FOR DO

Within each folder you will be able to search through the documents using the filters, with the same view and edit options from the menu button as you have in the **Documents** tab. You also have searchable activity history within each folder of the actions taken for that folder.

**Internal Document Manager**

Documents Folders Activity Overview Template Manager Admin

Home / Technical / Sub Technical

Current Site: Foods Connected (Group)

Create New Folder Document Search

Sub Sub Previous Level

Documents: 1  
Subfolders: 0

### Sub Technical Documents

Created By: All Status: All Document Category: All Document Sub Category: All Search... Filter Clear Filters

Move selected to...

<input type="checkbox"/>	Date	Document Name	Document Number	Document Category	Document Sub Category	Version	Status	
<input type="checkbox"/>	15/02/2022 10:03:02	Bethany Document 1	1011	Technical		2	Completed & Approved	

### Sub Technical Activity

Between Dates: User: All Document: All Document Action: All Folder Action: All Filter Clear Filters

Date	User	Document/Folder	Action
28/03/2022 22:12:27	Richard Peoples	Bethany Document 1	Added Document to Folder: Sub Technical

## 5. APPENDIX

Below is a description of each of the available roles within Internal Document Manager. These can be amended within the User Access section of the settings page on Foods Connected.

**View your site** – view your site documents only

**View all sites** – view all site documents

**View specific sites** – view your selected site documents only

**Create/Edit for their Site only** – ability to create new documents and edit existing ones for just their site

**Create/Edit All Sites** – ability to create new documents and edit existing ones for all sites

**Templates** – ability to edit FC templates for creating documents using a template

**Admin** – access to admin section with approval settings etc.

**Sign Off Document their Site only** – ability to sign off document for your site only

**Sign Off documents All Sites** – ability to sign off document for all sites