

# TOOL OVERVIEW

## DOCUMENT MANAGER



## TOOL OVERVIEW – DOCUMENT MANAGER

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### TOOL SUMMARY

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Our Document Manager tool enables you to create templates for internal procedures & processes. Documents can then be created using these standardised templates with full version control, internal approvers can be setup for a high level of control and to demonstrate due diligence throughout your company.

Documents can be shared both internally; and externally to suppliers for sign off. Reminders are automated for when they are required to be reviewed and signed off at a frequency set by you, ensuring documentation is always kept up-to-date.

As Documentation is stored in one central platform you can be certain that the relevant company team members and suppliers are all working off the same document versions. Fully tracked update history allows for better accountability and transparency of changes made.

Our dashboard functionality helps track the status of shared documentation to view at a glance the sign off status of documentation.

### KEY FUNCTIONALITY

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Our Document Manager has many features, the table below highlights the main actions you will be able to undertake using this tool and describes how functionality can be utilised within the system.

#### FORM BUILDER

Create document templates using numerous different customisable field types within our form builder, to gather the important information you need to be completed in your company documentation.

This ensures all documentation is completed to the required level and in a standard format throughout your company.

**DOCUMENTCONTROL**

All completed documents must be signed off by an assigned approver before they can be shared, ensuring control of all documentation within your company.

**DOCUMENTSHARING**

Documentation can be sent to internal users and suppliers on the platform to ensure all documents shared are up to date and give clear visibility of who documents have been shared with.

**SIGN OFF  
REQUIREMENT**

Sign Off can be marked as Mandatory for all documents. The Sign Off status for all documents can be reviewed at a glance in the sign off review. Documents which require supplier sign off will appear in the suppliers compliance summary in the Supplier Manager.

**DOCUMENT  
EXCEPTIONS**

An exception to signed off documentation can be created when required and shared with a supplier to sign off. Exceptions will track the exception details and the time frame for which it is acceptable.

**REVIEWAL  
PERIODS**

Set reviewal periods which will send automatic notifications to internal users and suppliers to review and re-sign off documentation, ensuring that all the information is kept up to date.

**BATCH REQUESTS**

Send documentation in bulk to internal users or suppliers at once reducing time spent sending out documents.

**RESPONSE  
SUMMARY**

Quickly surmise the current status of documentation sign off in a summary table of who a document has been sent to, when it was sent and what the current response status is.

**COLOUR CODED  
STATUSES**

Colour coded response statuses immediately give you an overview of which documentation requires sign off or review.

## UPDATES HISTORY

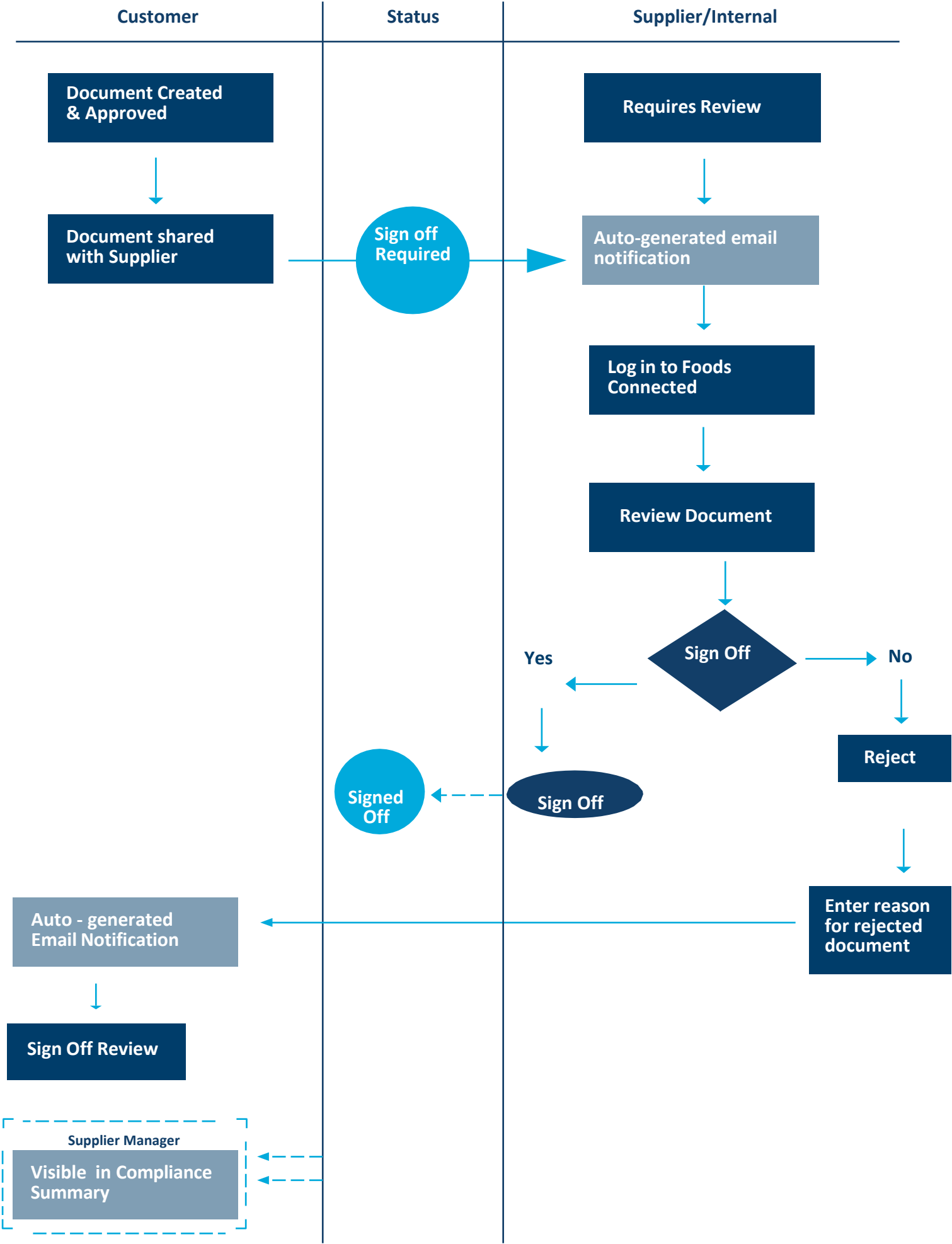
All changes made to the documents are tracked with details of the date and time as well as who made the change, allowing for full transparency

## DASHBOARDS

Create fully customisable dashboards including chart widgets provide an instant overview of documentation sign off.

TOOL PROCESS USAGE FLOW

The below process flow guides you through the steps of using the Document Manager and how the interaction moved back and forward between your company and your suppliers.



## CONFIGURATION OPTIONS

The Document Manager has possible configuration which are expanded upon below. They will allow you to tailor the tool to best fit your company's requirements.

### OPTION

### DETAILS

#### CUSTOM DOCUMENT TEMPLATE

Build a custom document templates to your requirements with our form builder's numerous field types including text, numeric, checkbox, dropdown and table options. Set fields in the document template as optional, mandatory or conditional mandatory based on previous information entered in a form.

#### CUSTOM TEMPLATE SETTINGS

Create custom settings on an individual template basis, setup custom sign off fields and declarations.

#### DOCUMENT SITE

Every document set against the company Group or an individual site to enable filtering and reporting against that site and to limit access to documents by site.

#### DOCUMENT CATEGORIES

Documents can be set as custom types, e.g. commercial or technical, and the document list can then be filtered by them.

#### SIGN OFF FREQUENCY

Each document can have a re-sign off frequency email notification reminders will be sent to review and re-sign the documents. E.g. if the frequency was set to 12 months, the user would receive reminders 12 months on from when their document was signed off.

## ADMINISTRATION OPTIONS

The administration settings for the Document Manager enables you to control several aspects of how questionnaires are set up and viewed.

### OPTION

### DETAILS

#### SETTING DOCUMENTATION CATEGORIES

Document Categories relevant to your company can be added in the document admin section.

#### SETTING EXPORT OPTIONS

Footer options for PDF exports of documentation can include page numbering, export details and customisable text as appropriate to your company's needs.

#### ADDING PRE-SET FIELDS

The ability to create pre-set fields, with set options, which can be pulled into your document templates, saves you time creating the same field and options multiple times. These fields can be dropdowns, checkboxes or tables with set options and they also help standardise response options.

#### DOCUMENT APPROVERS

Approvers can be allocated for documentation based on the document, category, template or site. E.g. A user can be set to approve all documentation for a selected template at selected site or can be set to approve all templates of selected category at a selected site.

#### EXTERNAL APPROVAL PROCESS

Pre-set Sign off declarations can be created for all templates.

## INTERACTION WITH OTHER TOOLS

Our platform is interactive meaning information can flow between tools enabling your processes to work cooperatively together all on the same system. The tools that can integrate and work together with the Document Manager are described below.

### TOOL

### DETAILS

#### SUPPLIER MANAGER

Documents shared with suppliers can be set as a mandatory requirement as part of a supplier's overall compliancy in the Supplier Manager. Document status and completed responses can be viewed with all other supplier data in the supplier's profile within Supplier Manager.

#### FORMBUILDER

Data forms linked to Audit Types can be customised to your requirements using the formbuilder.

## DATA REQUIREMENTS

Detailed below are the data requirements of what will be necessary to set up and make decisions in before launching the Document Manager.

### REQUIREMENTS

### DETAILS

#### SUPPLIER MANAGER LAUNCHED

To be able to share questionnaires with suppliers for response, the Supplier Manager tool on Foods Connected needs to have been launched with all the required suppliers added into the supplier list.

#### ACTIVE SUPPLIER CONTACTS

The relevant supplier users will be sent email invitations to join Foods Connected and they will need to activate their accounts to be able to view and sign off documents.



**CONFIRMED  
DOCUMENT  
CATEGORIES**

Document Categories are required to be set to allocate document approvers by category. DocumentCategories can also be used to filter to the documentation relevant to you.

**CONFIRMED RE-  
SIGN OFF  
FREQUENCIES**

The frequency at which you want your suppliers and internal users to review and resign off documentation needs to be confirmed before sharing documents.

**CONFIRMED  
DOCUMENT  
TEMPLATE**

Before creating a Document the template format needs to be confirmed.

**CONFIRMED CUSTOM  
TEMPLATE SETTINGS**

Before creating the template you need to confirm the custom settings and if you want to use them.

**APPROVERS  
CONFIRMED**

Approvers need to be confirmed before documents are created and shared. The category, site and templates the approver is allocated to must also be confirmed.

**INTERNAL USERS  
ACTIVE**

In order to share documentation internally and assign issues to user all internal users must first be active on Foods Connected.

**SIGN OFF  
DECLARATIONS**

Sign off declarations if required must be confirmed before documents can be shared for sign off.

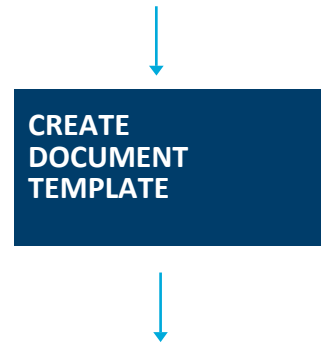
TOOL SETUP PROCESS FLOW

The process flow in the following page guides you through the steps of setting up the Document Manager and the information that needs included to be able to launch it to your suppliers.

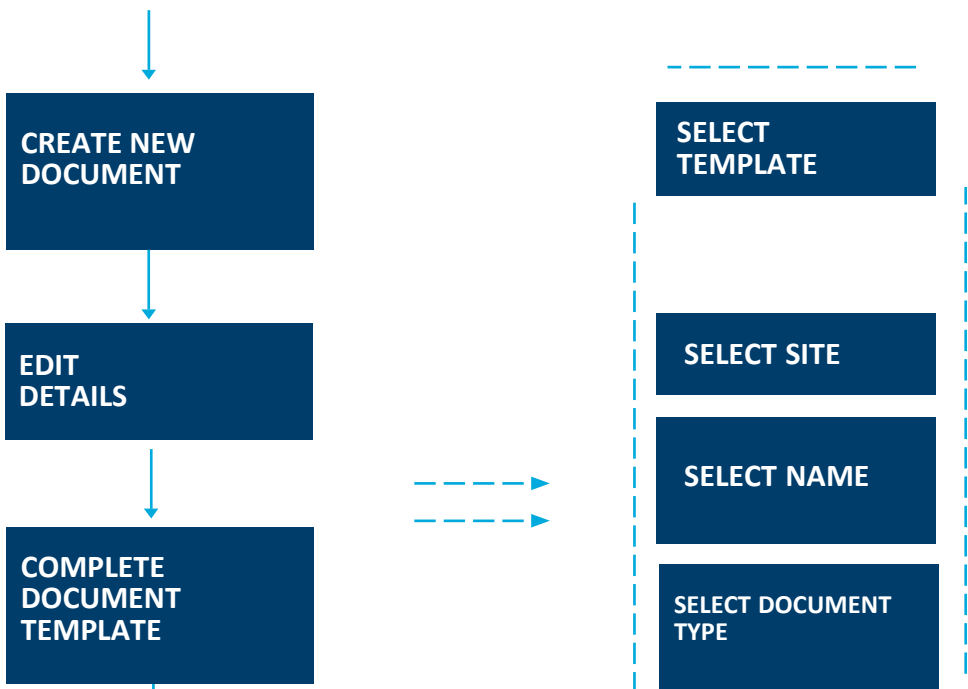
DOCUMENT MANAGER ADMINISTRATOR



USER CREATING DOCUMENT TEMPLATES



USER CREATING DOCUMENTS



ASSIGNED DOCUMENT TEMPLATE APPROVER

