

TOOL OVERVIEW



QUESTIONNAIRE MANAGER



TOOL SUMMARY

Our Questionnaire Manager tool enables you to gather and manage the information you require from your supplier in a format that is straightforward to view and update. You can create questionnaires using our customisable form builder to collect your suppliers' information in an easy to complete format, with optional scoring criteria to automatically give you overall risk ratings on their responses.

Automatic reminders to suppliers to review their questionnaire responses at intervals set by you, ensures their information is always kept up to date. As the questionnaire responses are stored in one central platform, without the complication of separate documentation, you can be certain that the relevant company team members are all working from the same supplier information. Fully tracked update history for both the customer and the supplier allows for better accountability and transparency of changes made.

Our reporting functionality helps you to analyse and compare your suppliers' responses and the customisable charts in our dashboards can provide a summarised overview of the response information that is of key importance to you.

KEY FUNCTIONALITY

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

FORM BUILDER

Create supplier questionnaires using numerous different customisable field types within our form builder, to gather the important information you need from your supply base in an easy to complete format.

EMAIL TRIGGERS

Set up automatic email triggers for specific supplier responses to notify relevant users if further action is required based on a response.

SCORING CRITERIA

Scoring criteria can be created to rate questionnaires based on the risk level of a supplier's responses.

REVIEW PERIODS

Set reviewal periods which will send automatic notifications to suppliers to update their questionnaire response, ensuring that all the questionnaire information is kept up to date.

BATCH REQUESTS

Send a questionnaire to multiple suppliers at once reducing time spent sending to suppliers individually. All information is kept up to date.

RESPONSE
SUMMARY

Quickly surmise the current status of questionnaire responses in a summary table, detailing who a questionnaire has been sent to, when it was sent and what the current response status is; the reviewal date will also be included if relevant.

COLOUR CODED
STATUSES

Colour coded response statuses immediately give you an overview of which sent questionnaires are awaiting response, require your action or have been completed.

UPDATES
HISTORY

All changes made to the questionnaire form, or a questionnaire response are tracked with details of the date and time as well as who made the change, allowing for full transparency and accountability of updates.

REPORTING

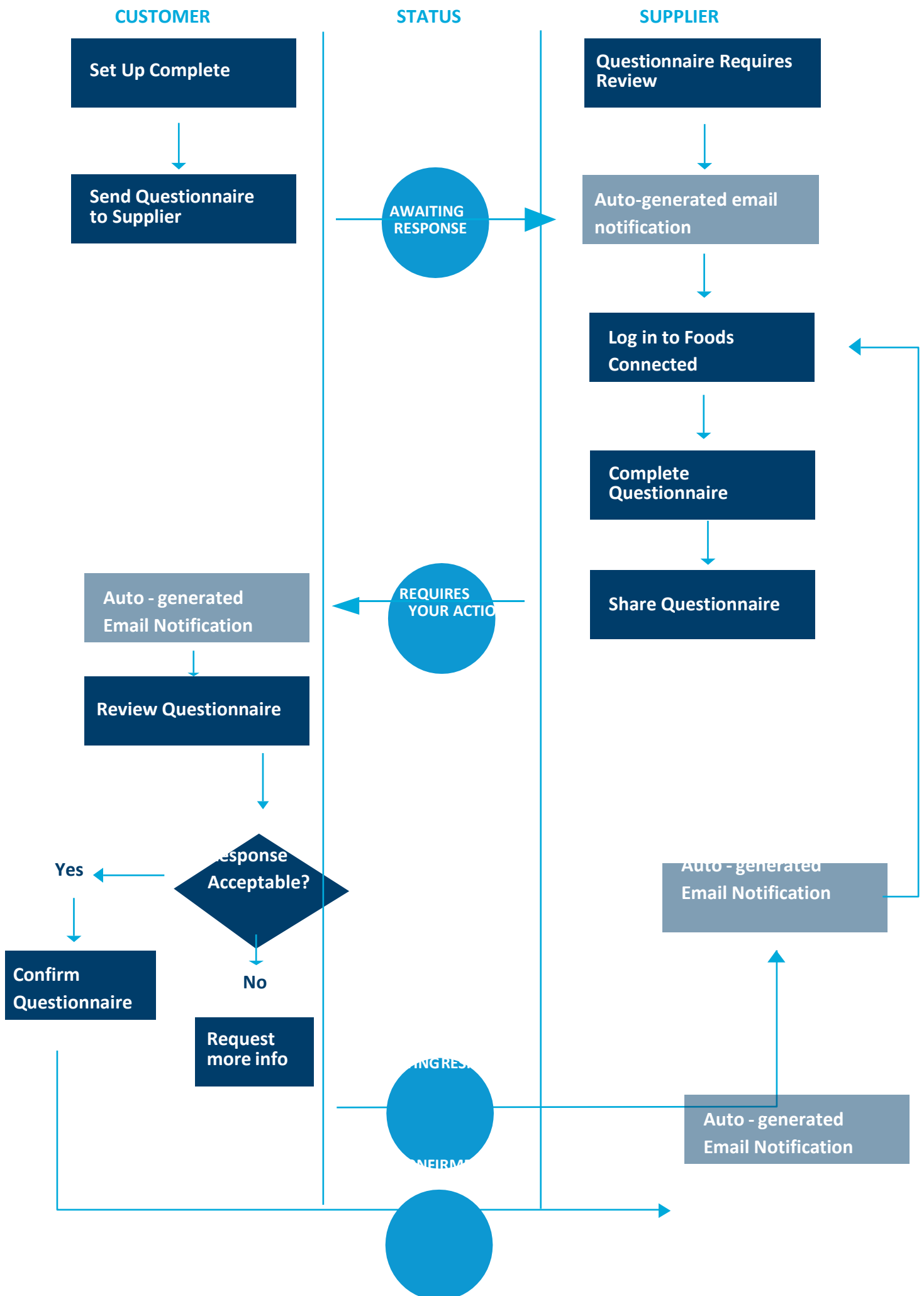
Reporting can be carried out on the supplier responses utilising our comparison reports to contrast different supplier responses to the same questions or our snapshot reports to analyse responses with summary charts; both types can be exported to PDF or Excel.

DASHBOARDS

Create fully customisable dashboards including chart widgets from your created reports or general response status widgets which provide an instant overview of questionnaire responses.

TOOL PROCESS USAGE FLOW

The below process flow guides you through the steps of using the Questionnaire Manager and how the interaction flows between your company and your suppliers.



CONFIGURATION OPTIONS

There are various possibilities for configuration within the Questionnaire Manager which are expanded upon below. They will allow you to tailor the tool to best fit your company's requirements for gathering supplier information, in a way that will make the process as hassle-free as possible.

OPTION

DETAILS

CUSTOM QUESTIONNAIRES

Build a custom questionnaire to your requirements with our form builder's numerous field types including text, numeric, checkbox, dropdown, and table options. Set questions as optional, mandatory, or conditional mandatory based on an answer to a previous question.

CUSTOM CONFIRMATION TEMPLATES

Build a confirmation template using our form builder for you to complete after the supplier has responded and you want to record information against the confirmation of the supplier's questionnaire response.

PRE-SET SUPPLIER DETAILS

When setting the questionnaire details, you can select various pre-set fields, such as supplier address, contacts, or approval document status, from the supplier's profile to pull into the supplier's response. This means the supplier user has fewer questions to answer and the customer user can review all their supplier's important information in one central place.

QUESTIONNAIRE TYPE

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

SCORING CRITERIA

Set optional scoring criteria against the questionnaire form and/or the confirmation template. Setting scores against individual supplier responses and colour coding the total scores allows you to quickly view which suppliers have the riskiest questionnaire responses.

REVIEW FREQUENCIES

Each questionnaire form can have a review frequency set against it and the supplier user who originally sent the response will receive email notifications reminding them to review and update their questionnaire response. For example, if the frequency were set to 12 months, the supplier user would receive reminders 12 months on from when their questionnaire response was confirmed.

SHARING SPECIFIC QUESTIONNAIRE SECTIONS

When sharing your questionnaire form with the supplier you can select which questionnaire sections to share so, the supplier doesn't receive questions that aren't relevant to their company. This means only the relevant important information is being gathered from each supplier, but you don't have to create more than one questionnaire. This can also be edited after the supplier has responded so you can show/hide sections based on their response.

RESTRICTED VISIBILITY

If a questionnaire is confidential, it can be set that only the supplier user that the questionnaire is sent to can view and send a response. Internal visibility can also be limited to particular company users if required, so, only those selected can view the questionnaire and its supplier responses.

ADMINISTRATION OPTIONS

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

SETTING QUESTIONNAIRE TYPES

Custom questionnaire types can be created, e.g., commercial, or technical, and set against questionnaires allowing the questionnaire list to then be filtered by them.

SETTING EXPORT OPTIONS

Footer options for PDF exports of completed questionnaires 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 questionnaire forms, 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, making it easier to report on the suppliers' responses.

INTERACTION WITH OTHER TOOLS

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

SUPPLIER MANAGER

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

RISK ASSESSMENT MANAGER

Supplier responses can be pulled into risk assessments and assigned scores to determine how risky the supplier is.

SPECIFICATION MANAGER

Supplier responses can be pulled into ingredient specifications and assigned scores to help determine how risky an ingredient is.

DATA REQUIREMENTS

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

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 respond to sent questionnaires.

CONFIRMED QUESTIONNAIRE TYPES

The questionnaire types you want to be able to filter by need to be decided upon before creating questionnaire templates.

CONFIRMED REVIEW FREQUENCIES

The frequency at which you want your supplier to review and update their questionnaire responses needs to be agreed upon before creating questionnaire templates.

CONFIRMED QUESTIONNAIRE TEMPLATE

Before sending a questionnaire, the questions included in the template and their format need to be confirmed. Fields with pre-populated options should be used where possible to maximise reportability on the responses. If information from the questionnaire is going to be pulled into risk assessment templates on the platform, the risk assessment should be confirmed to ensure the questionnaire fields are compatible.

SCORING CRITERIA

If scoring criteria is required, the scores for each response and score boundaries must be confirmed. The boundary description and colour coding must also be confirmed. E.g., if a score is 90-100 the supplier is high risk and colour coded red.

CONFIRMED QUESTIONNAIRE CONFIRMATION TEMPLATE

Before sending a questionnaire, it needs to be decided if a confirmation template is required and if it is, what questions need to be included and in what format.

EMAIL TRIGGERS

If email triggers are required, what triggers an email alert in a template and the user/s to be notified must first be confirmed. Email triggers can only be generated from pre-populated fields.

TOOL SETUP PROCESS FLOW

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

QUESTIONNAIRE MANAGER ADMINISTRATOR

