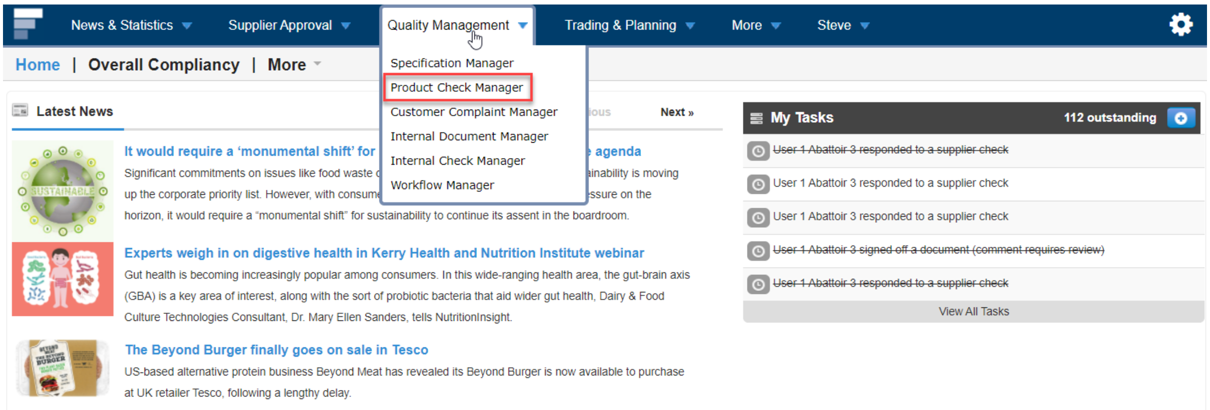
TOOL USER GUIDE

PRODUCT CHECK MANAGER

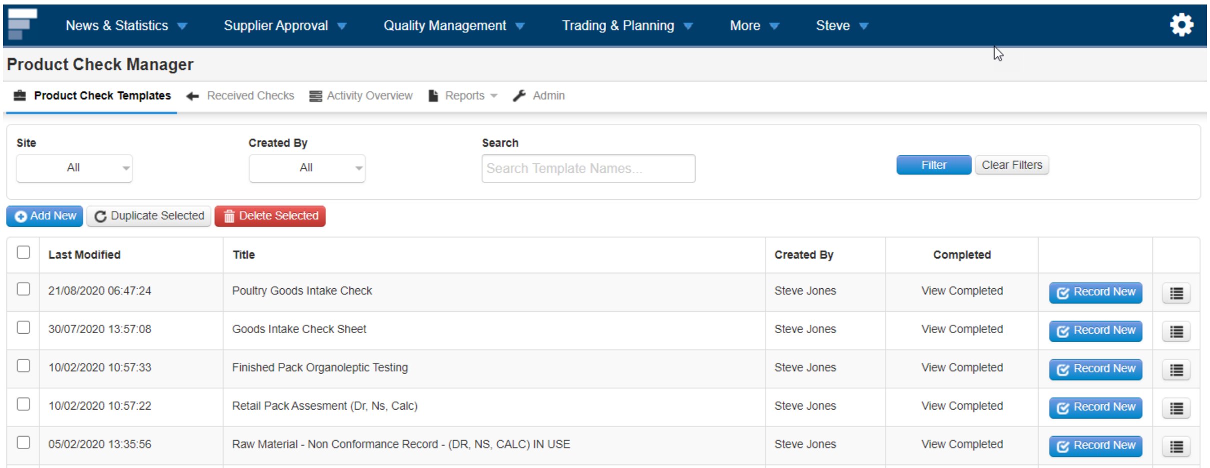
CONTENTS

1. HOW TO ACCESS PRODUCT CHECK MANAGER

Step 1: Sign in and go to ***Product Check Manager*** under Quality Management

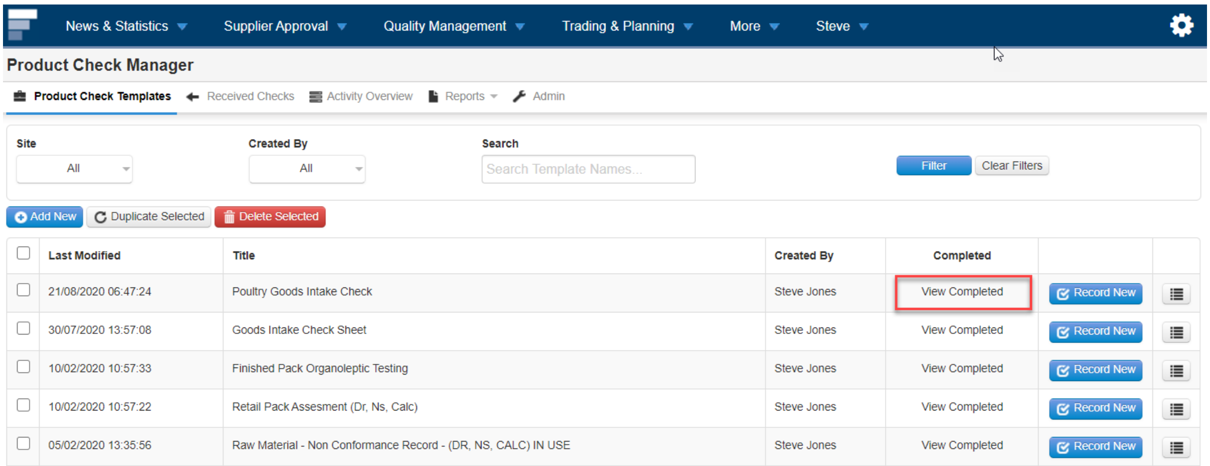


Step 2: The tool opening view shows the list of the Product Check templates

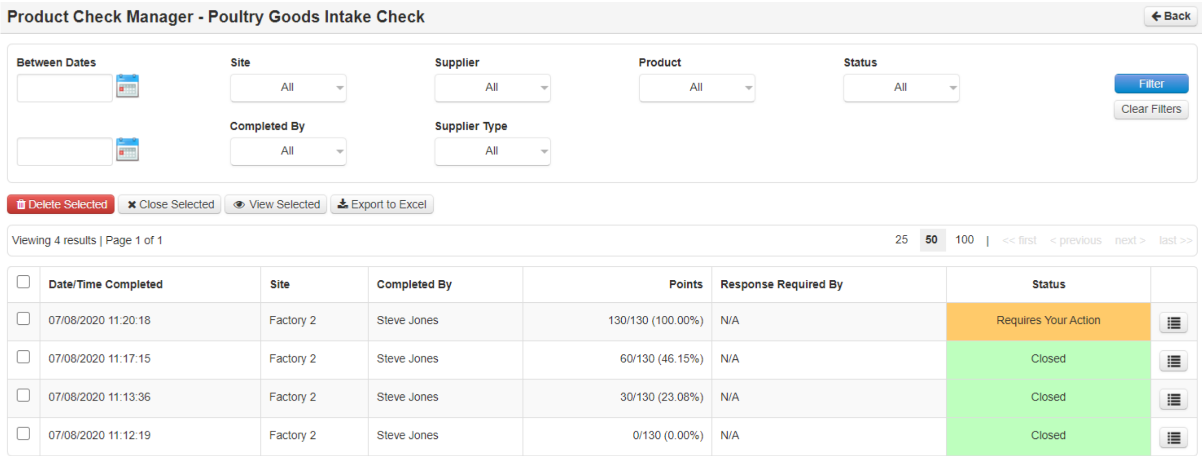


1.1 HOW TO VIEW COMPLETED & IN PROGRESS PRODUCT CHECKS

Step 1: Once a check is created, go back to the Product Check Manager template list and select ***view completed*** on the form that you used

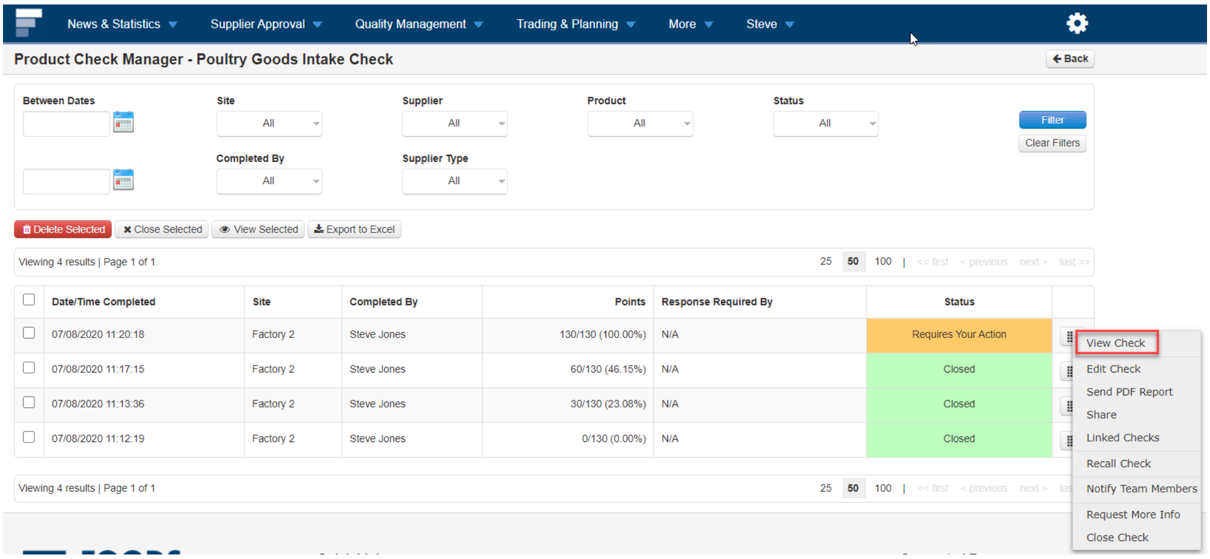


Step 2: A list of all the completed & pending checks will show



Step 3: You can view each Product Check by selecting ***View Check***.

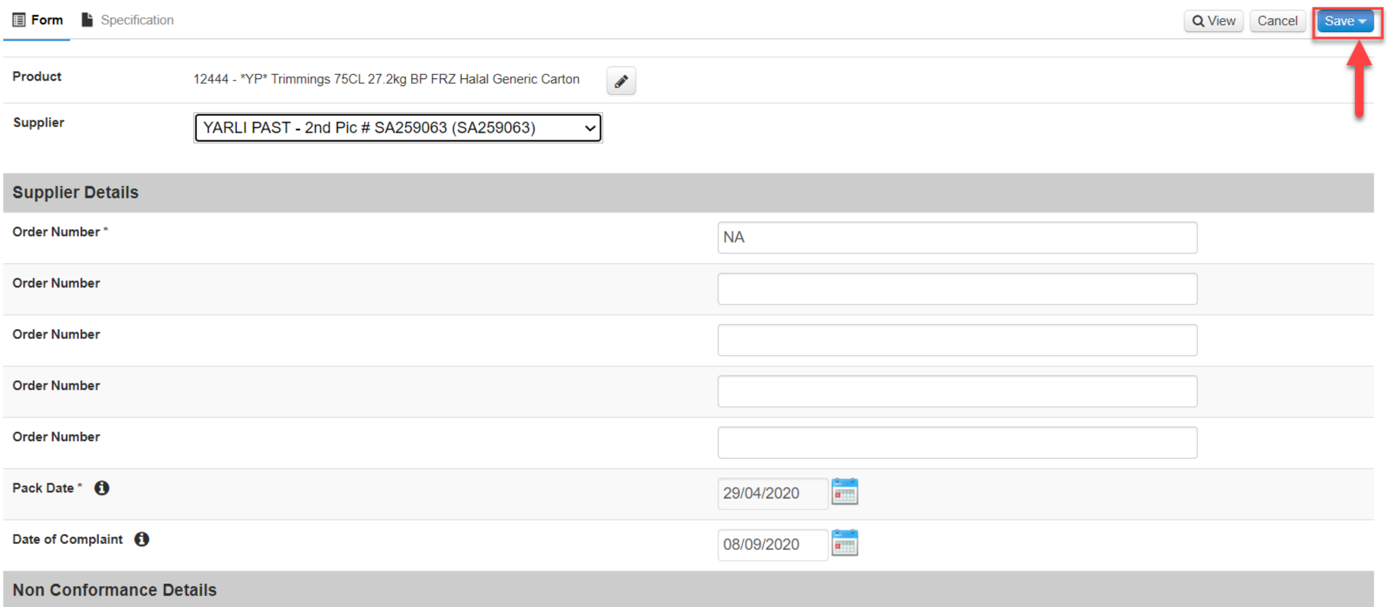
(From here you can also edit the check, share it, request more info or close the check)



Step 4: The completed check with the check and response details will then be displayed

Product	Category	Risk Rating	Re-classified rating	Completed By	Response Required By	Status	
160497 - Lamb Trimmings 85CL MW/VAC Carton	Foreign Object	Major		Craig Wilson	15/09/2020 05:10:00	Closed	
12444 - *YP* Trimmings 75CL 27.2kg BP FRZ Halal Generic Carton	Other	Minor		Chris Shennan	15/09/2020 03:29:00	Awaiting Response	
694286 - Lamb Trimmings 85CL MW/VAC Carton	Foreign Object	Major		Craig Wilson	14/08/2020 07:10:00		
681564 - Pork Trimmings 90CL 20kg FRZ Carton	Foreign Object	Notify		Craig Wilson	17/07/2020 22:13:00	Closed	
764700 - *YP* Trimmings 72CL 27.2kg BP FRZ Non-	Foreign Object	Major		Craig	19/05/2020	Closed	

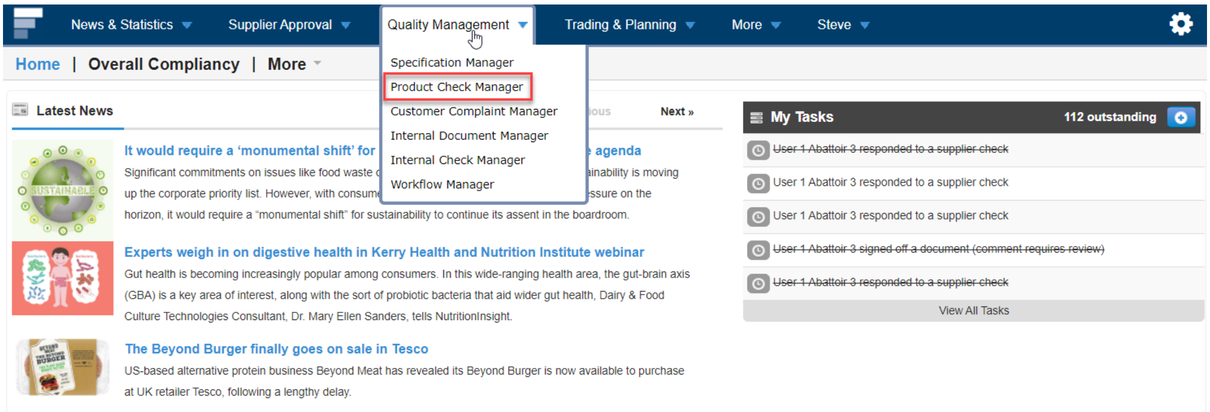
Step 5: To edit the Check. Right click on the menu icon and select EDIT. This will enable you to edit the Product Check and then Save.



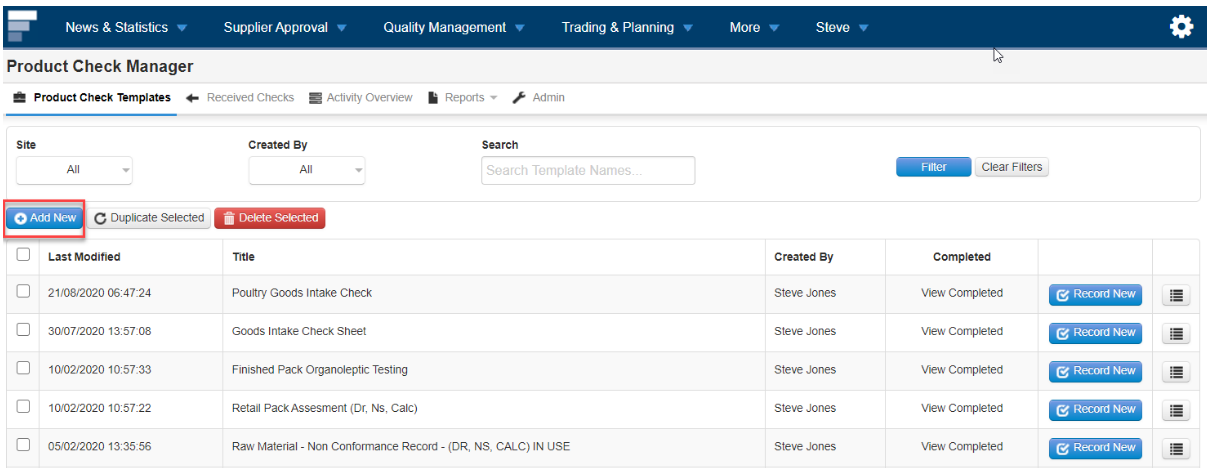
2. SETUP

2.1 HOW TO CREATE A PRODUCT CHECK TEMPLATE

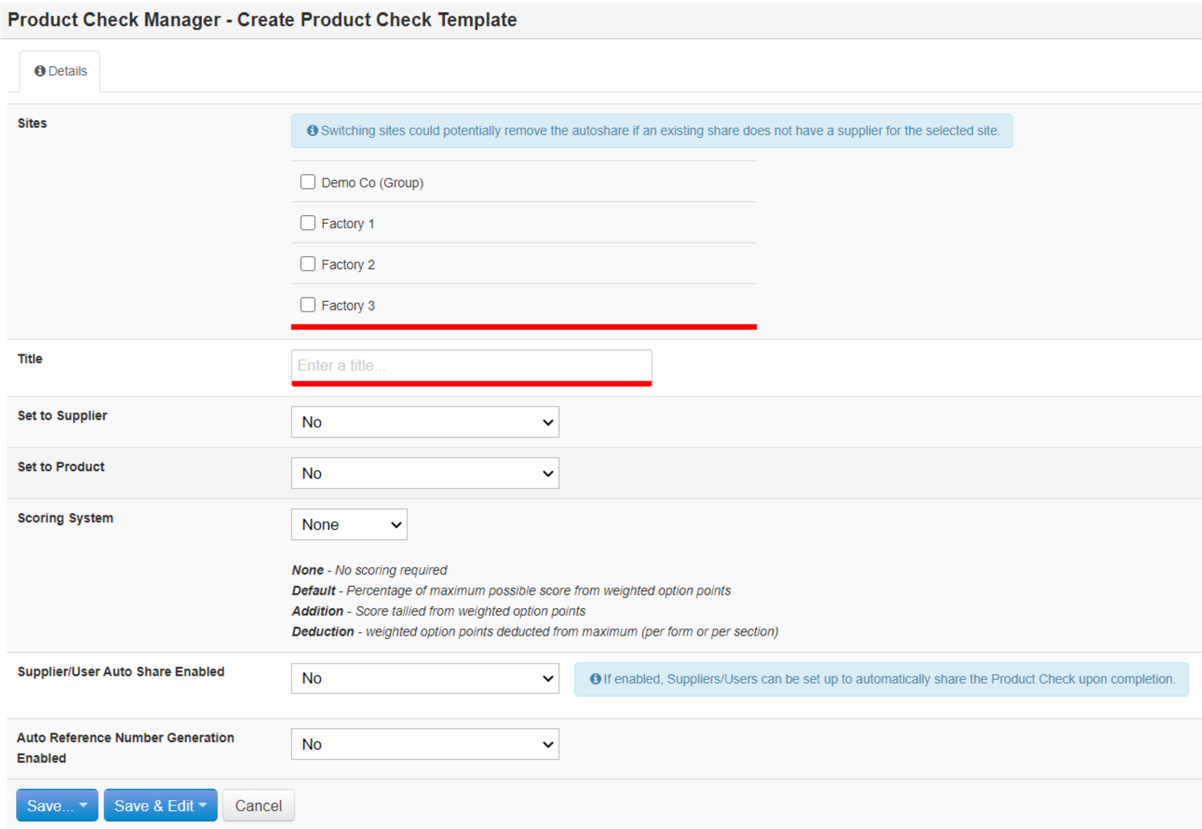
Step 1: Sign in and go to ***Product Check Manager*** under Quality Management



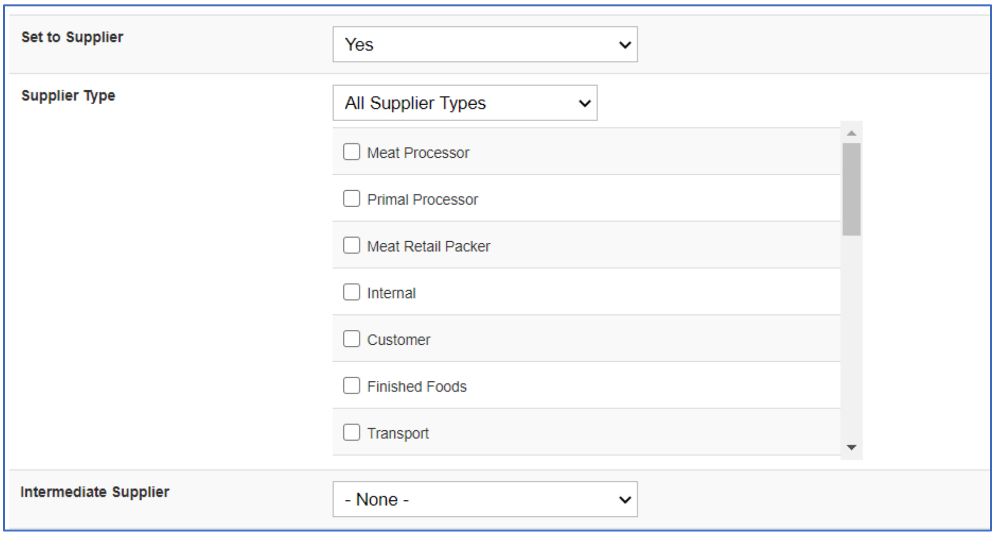
Step 2: Select ***Add New***

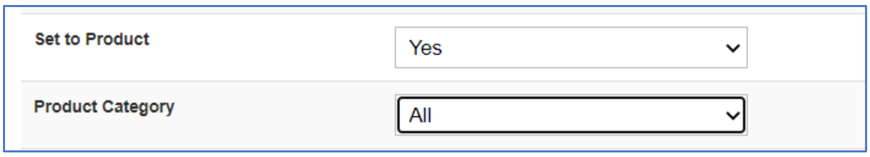


Step 3: This is where you setup the details for that ***Product Check***



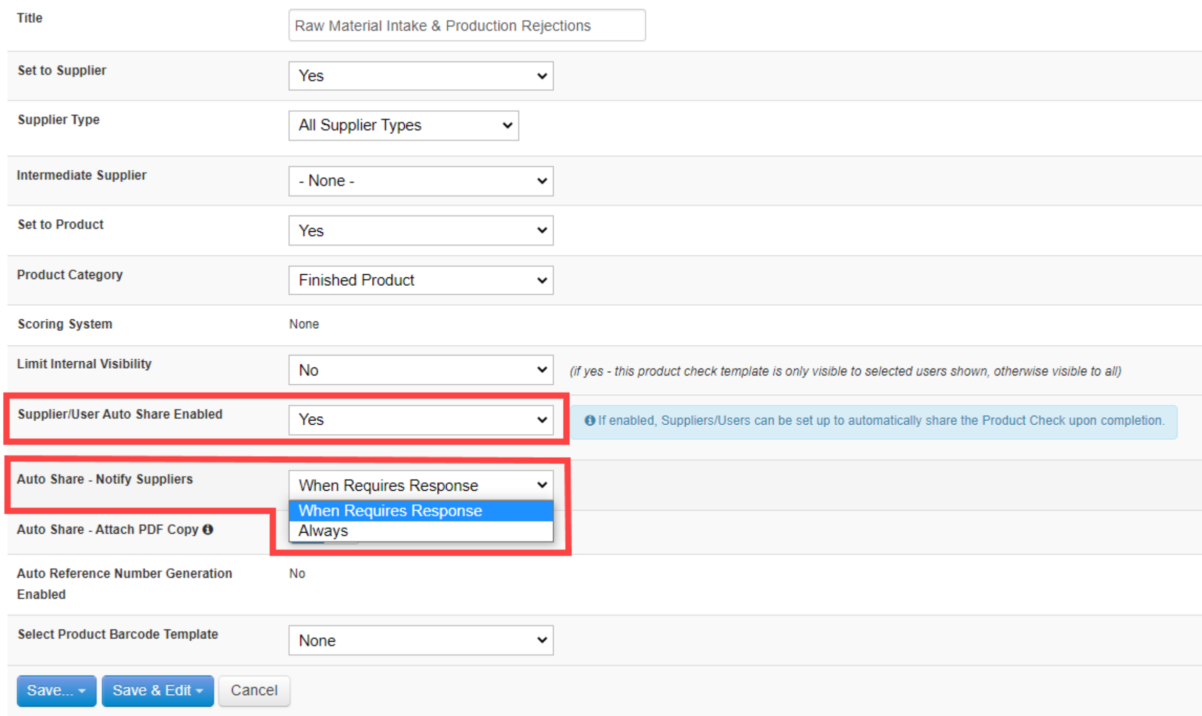
Note that when details are added in this screen there may be different options that then require populating (see examples below)



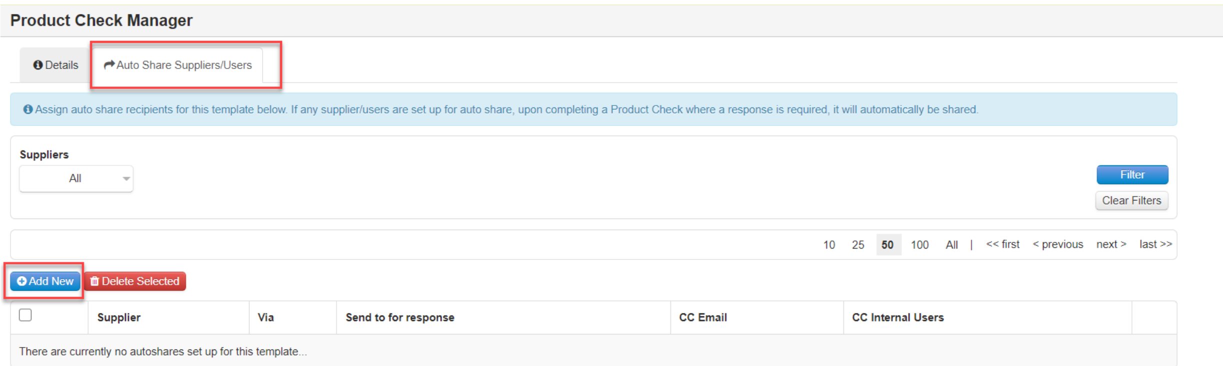


Step 4: The Check also allows for a PRODUCT CHECK to be Auto Shared. This function allows for Product Checks to be automatically shared upon Completion to supplier users or teams. To turn this on, enable “Supplier/User Auto Share”.

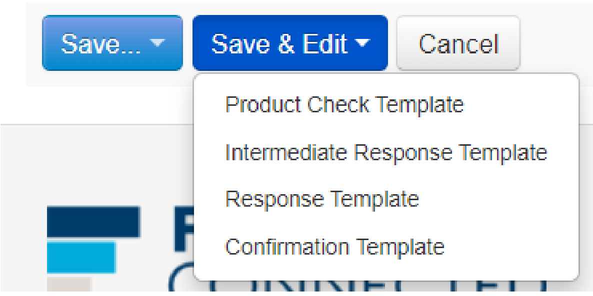
In addition, there is the option to set Auto Share to "Always" on or only "When Requires Response". The email Auto Share will ultimately be dictated by the user completing the check on the desktop site or the app, where they'll be prompted in a dialog box to set "Require response" to Yes or No at submission.



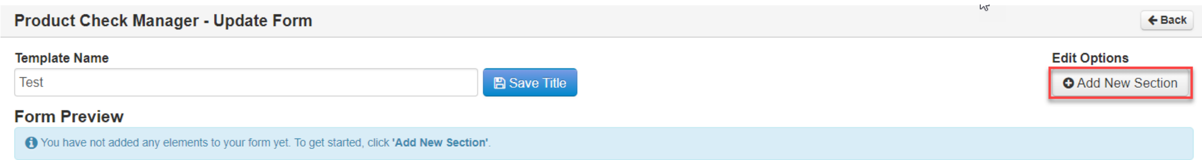
Auto Share users can be setup at the top of the "Edit details" screen, in the "Auto Share suppliers/users" tab.



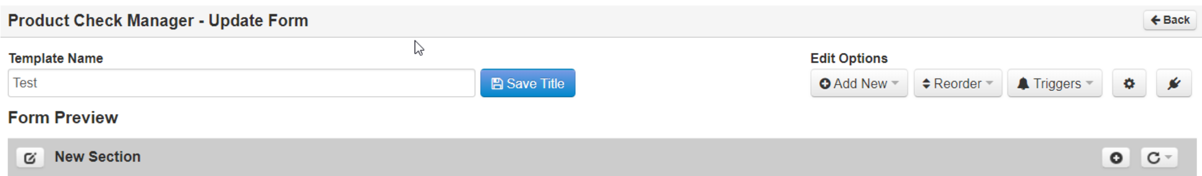
Step 5: Once done above select ***Save & edit*** then select ***Product Check Template***



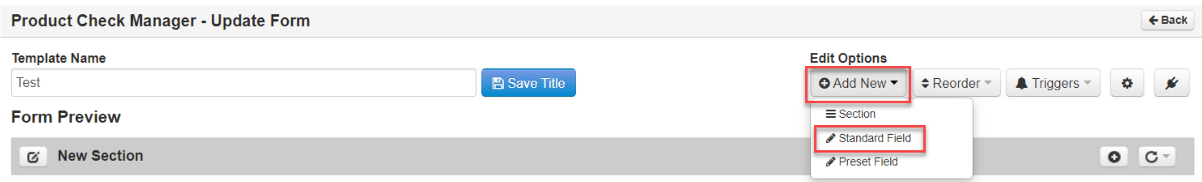
Step 6: Build your check using the form builder to suit your needs. To add a new section select ***Add New Section***.



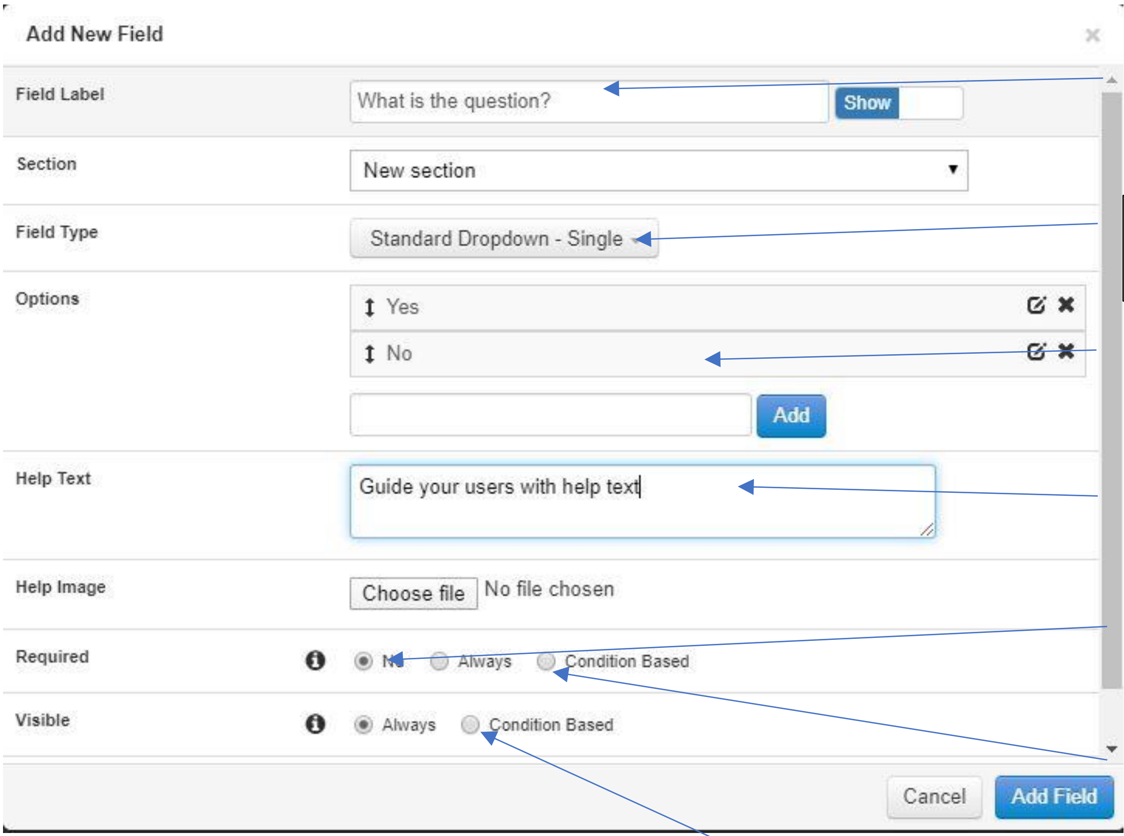
New Section looks like this below



Step 7: To add a new field or question select ***Add New – Standard Field***



Step 8: Now add in the details of the question & how you want it answered using the field types.



Enter your question here

Choose the field type or way to answer question

Choose the answers or options for the question

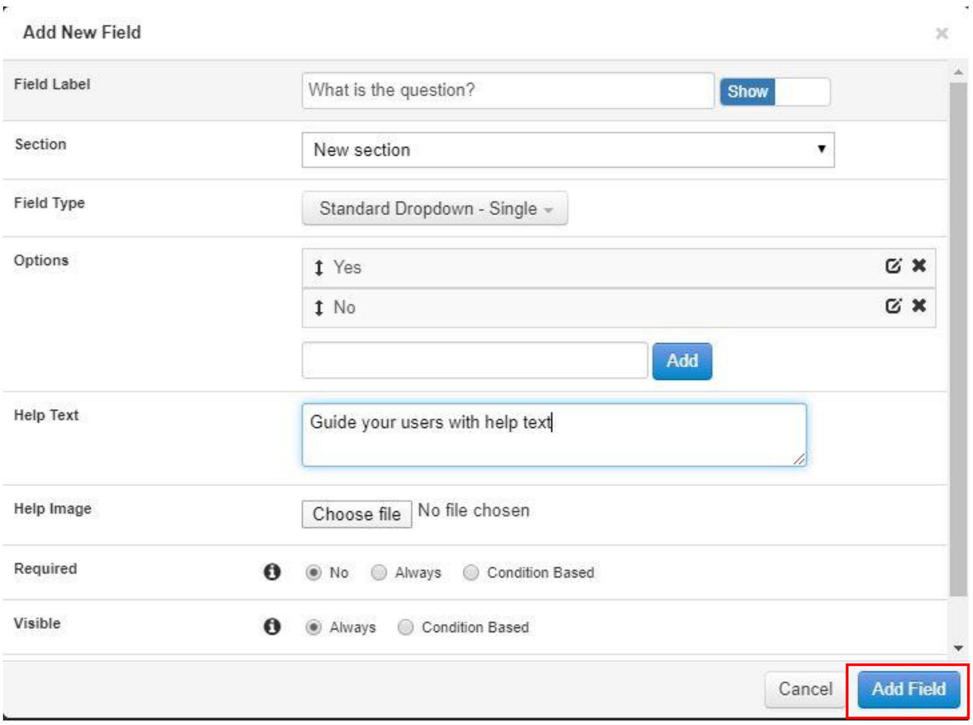
Help text is good to guide the user

Select if this question is required to be answered by the user

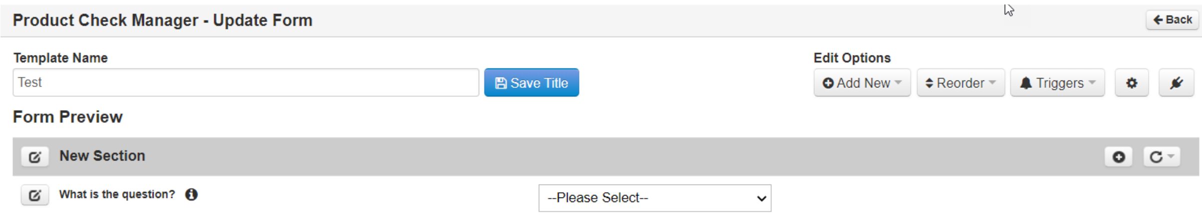
Select if this question is conditionally based on the answer of another

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

Step 9: Once done select ***Add Field***

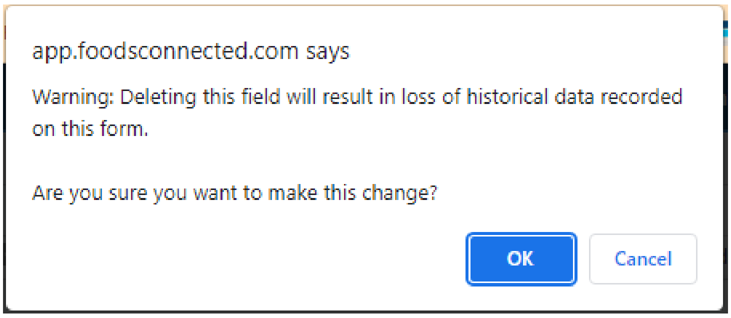


New Field looks like this below

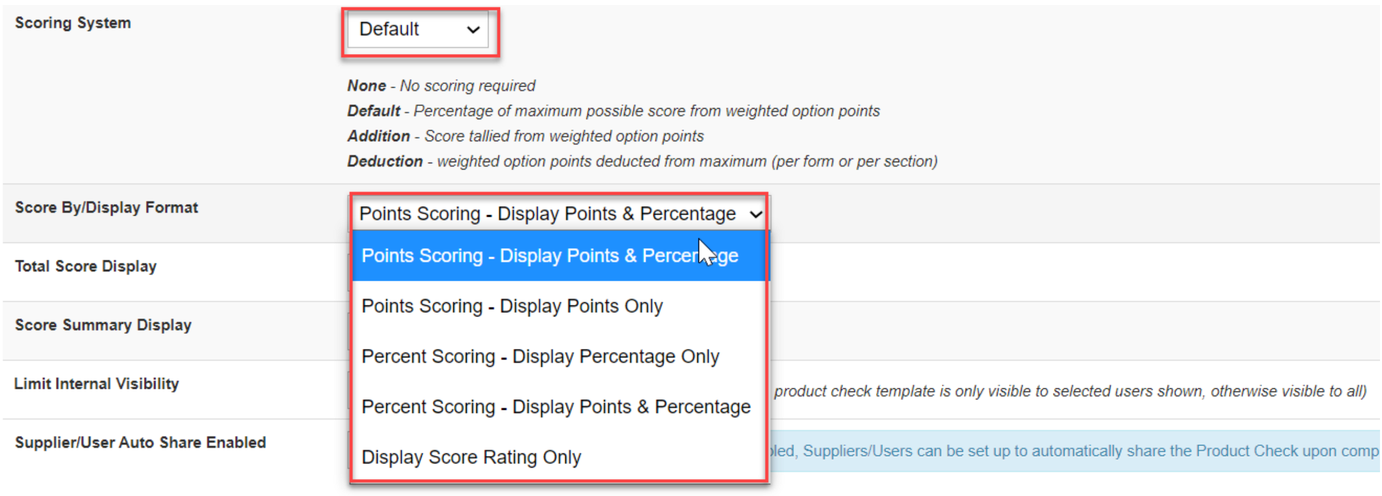


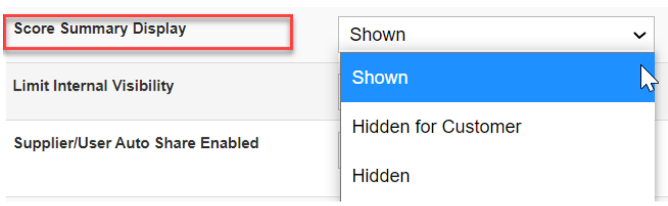
Step 10: Repeat steps to build up your check

Step 11: Deleting a field from a Product Check Template will result in a loss of historical data associated with that field and a warning message will appear as below, requiring confirmation before proceeding.



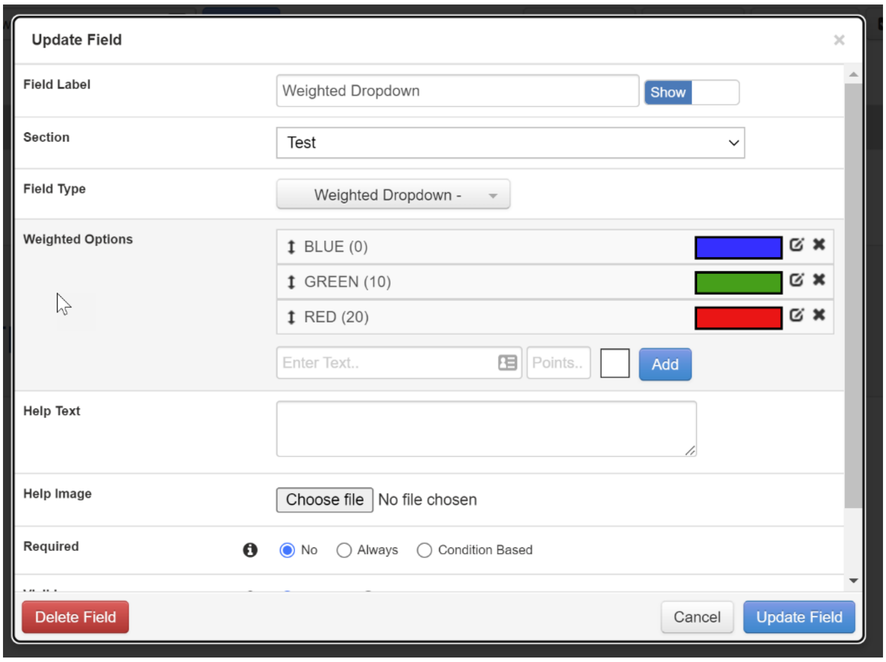
Step 12: Product Check Scoring. Edit Product Check Template.





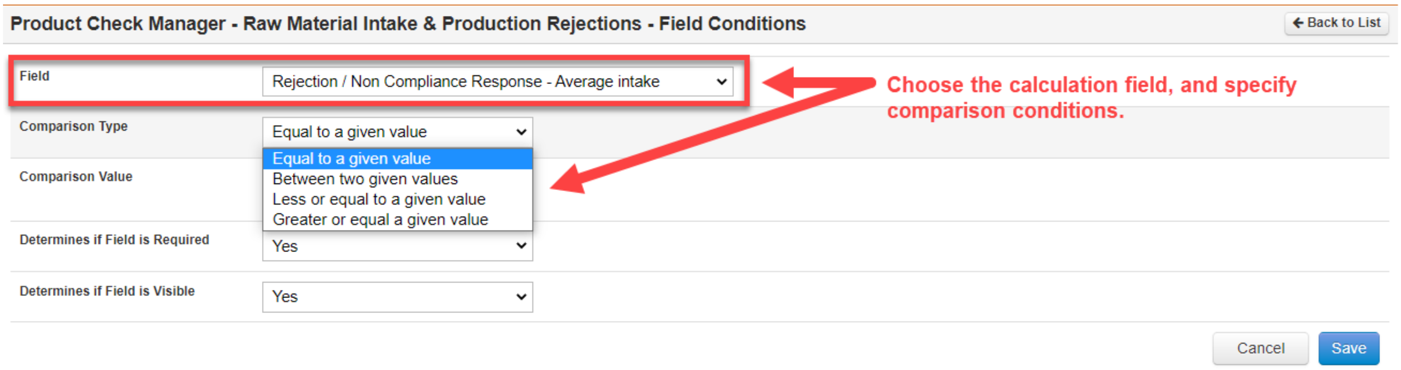
Step 13: Product Check Scoring templates – Colour coded dropdowns.

For product check templates with scoring enabled, colours can be set against “Weighted dropdown” options. These will pull through when completing the check and viewing completed records. Click on the edit button beside each dropdown option to add a colour from the palette.



Step 14: Using the result from a calculation field to setup conditional fields.

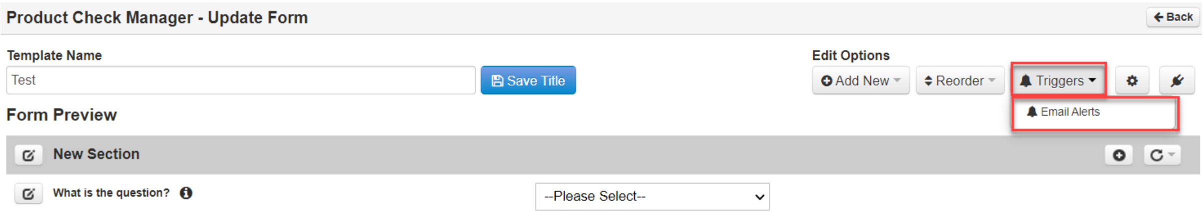
When setting up conditional fields using the value from another numerical field, it's possible to also use the numerical result from a calculation to determine field visibility or requirement, by selecting the calculation field in the "Field conditions" dialog box and setting the "Comparison type" and "Comparison value".



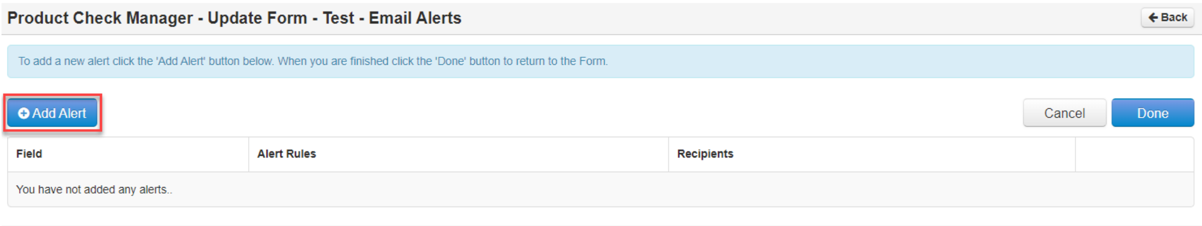
2.1.1 HOW TO ADD EMAIL TRIGGERS

Email alerts are a feature that allows 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.

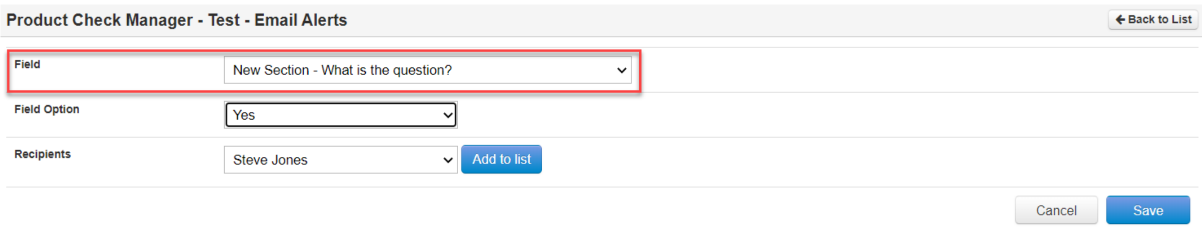
Step 1: Select ***Triggers*** & ***Email Alerts***



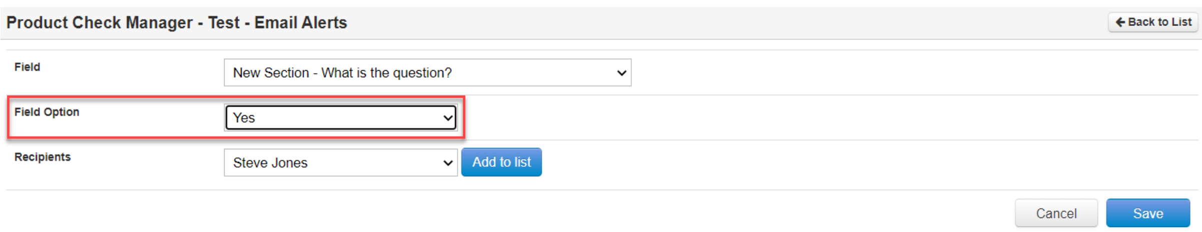
Step 2: Now select ***Add Alert***



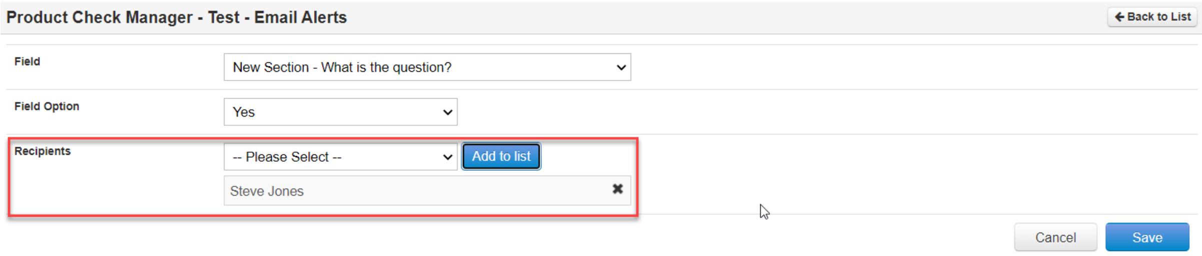
Step 3: Select the question that requires the email trigger from the ***Field*** dropdown list of options (these are all fields in the template built for this Product Check)



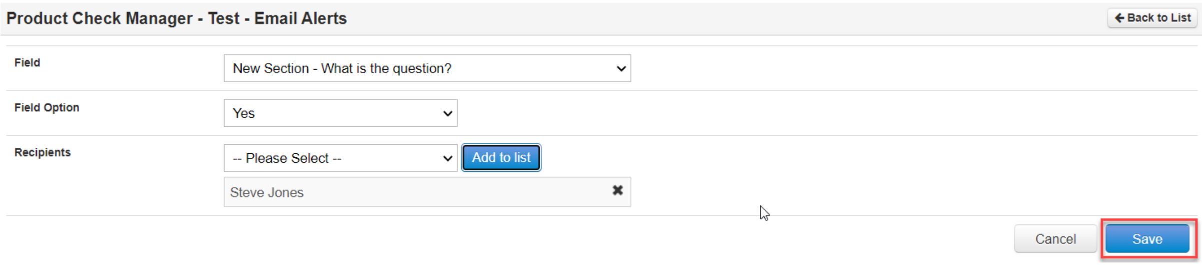
Step 4: Then select the answer from ***Field Option*** that will raise the trigger/alert



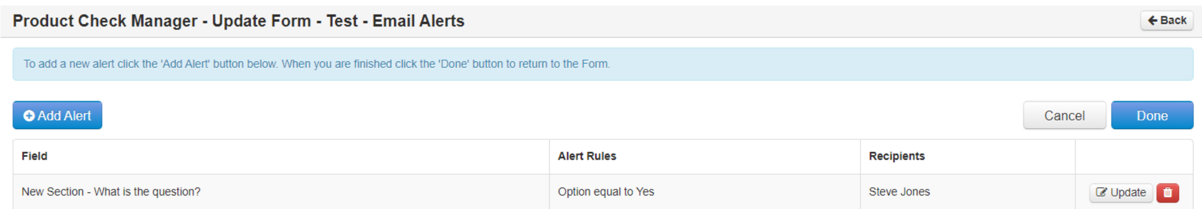
Step 5: Select the user or team from the ***Recipients*** dropdown list that will receive the notification and select ***Add to list***. Repeat this until all users requiring the notification have been added.



Step 6: Select ***Save*** button



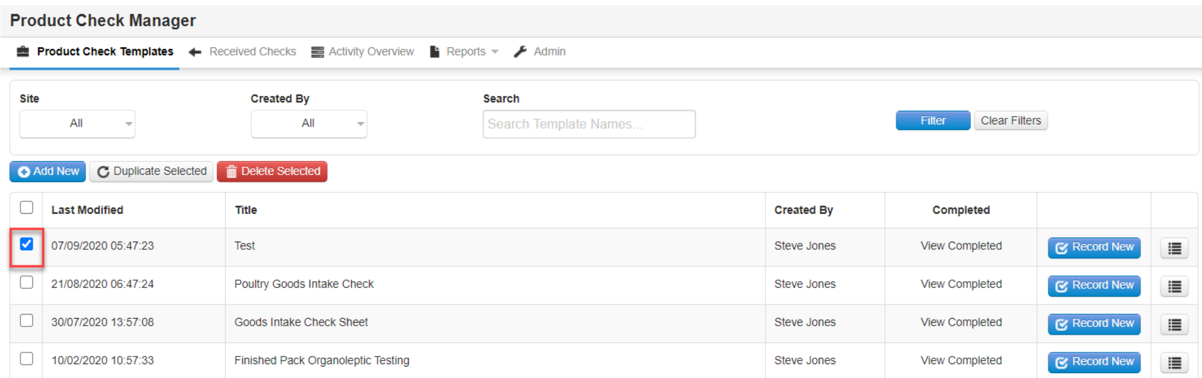
Trigger setup will look like this below



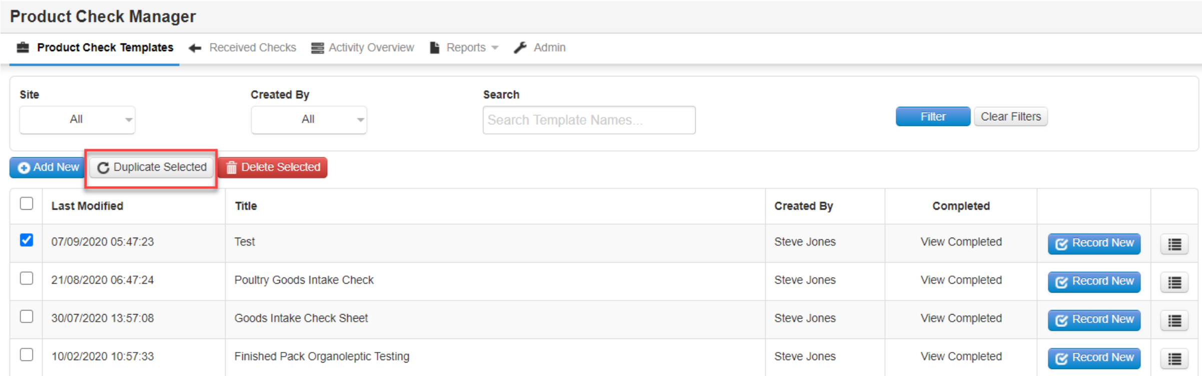
Step 7: Repeat steps to add triggers to any question.

2.1.2 HOW TO DUPLICATE A PRODUCT CHECK TEMPLATE

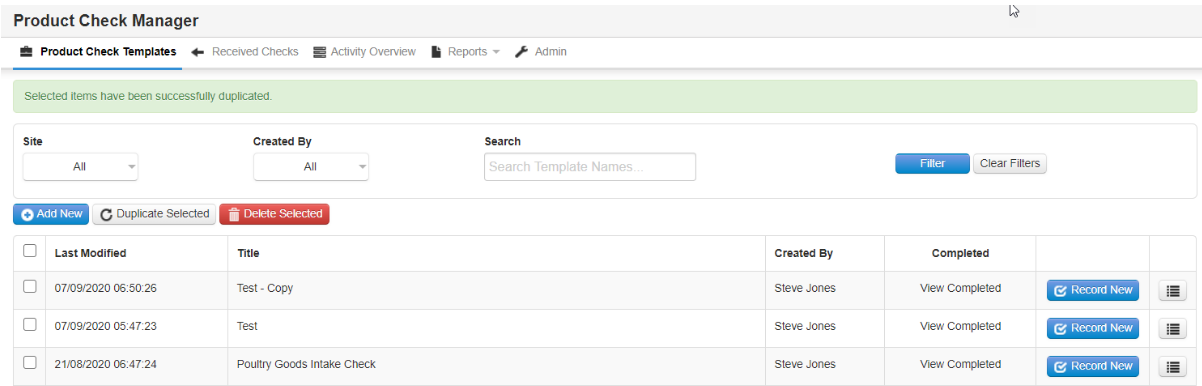
Step 1: Select the template you want to duplicate by selecting the check box on the left side



Step 2: Then select ***Duplicate Selected***

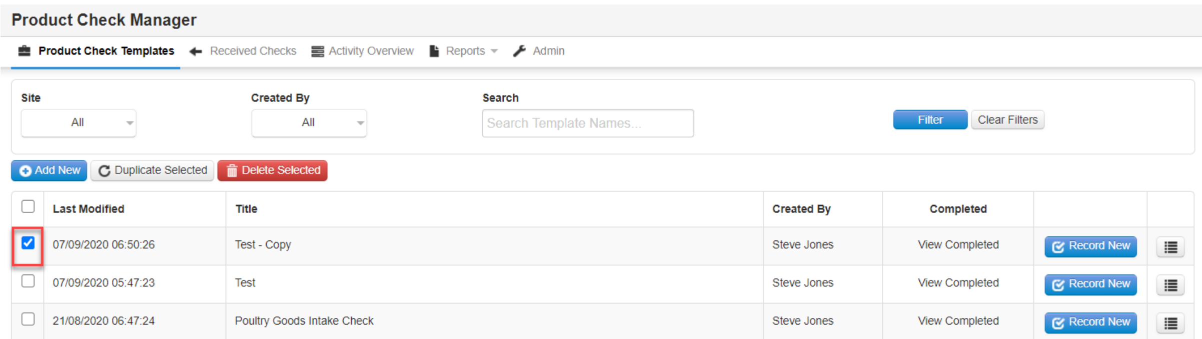


Step 3: Your duplicate template will now show, ready to edit or use.

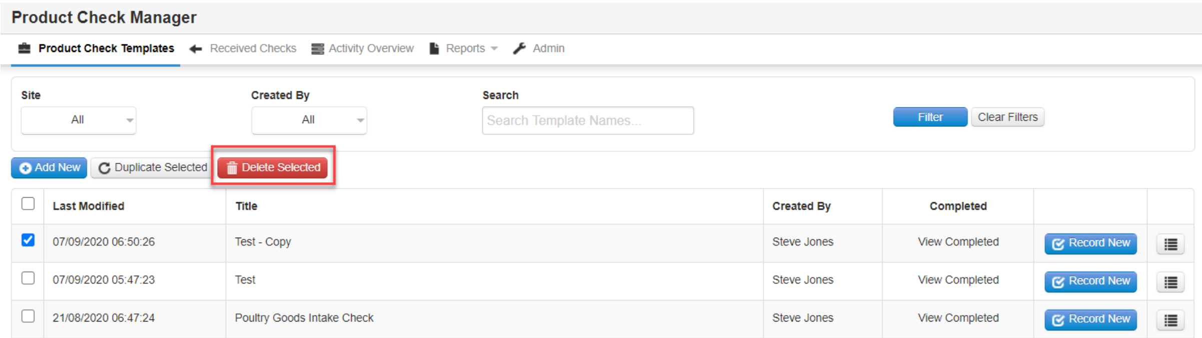


2.1.3 HOW TO DELETE A PRODUCT CHECK TEMPLATE

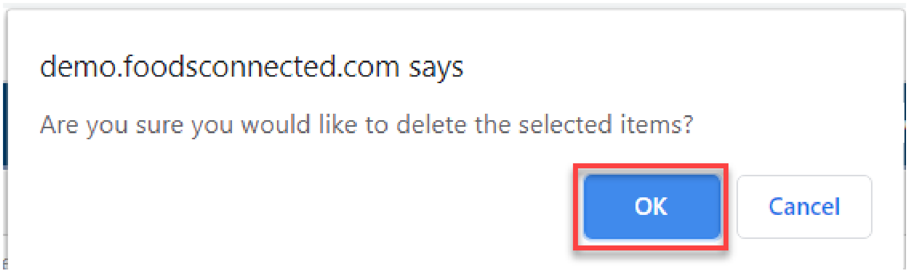
Step 1: Select the template you want to delete by selecting the check box on the left side



Step 2: Choose ***Delete Selected***



Step 3: A confirmation window will come up, if this is the correct item to be deleted click the ***OK*** button

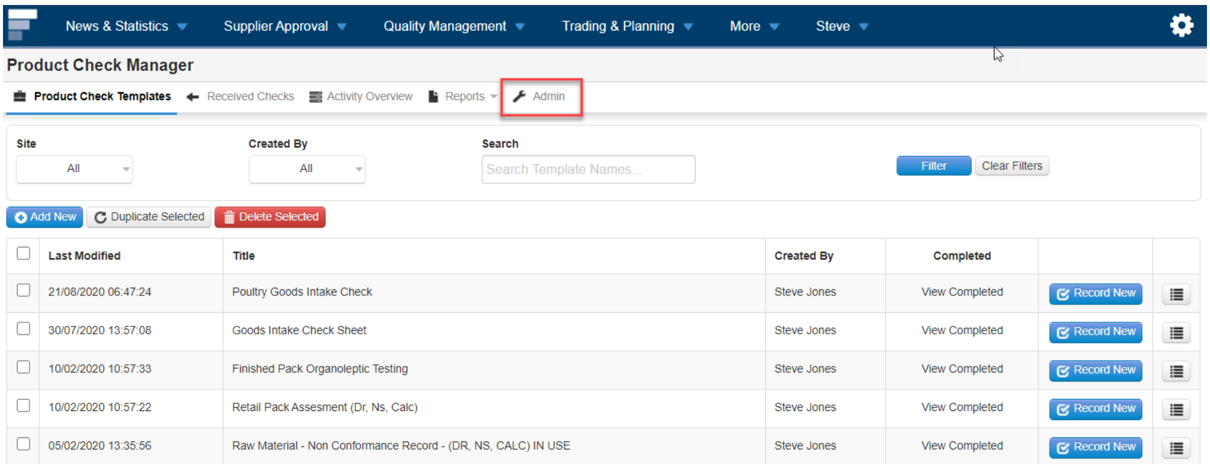


Step 4: The template will now be deleted & its history

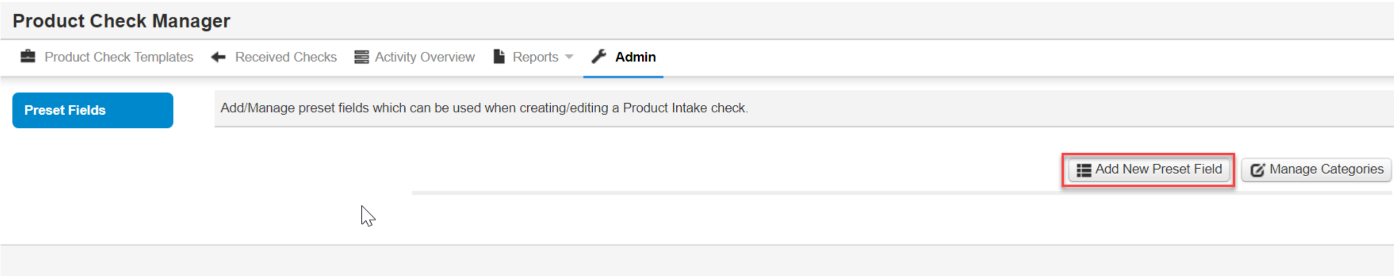
2.1.4 HOW TO SETUP PRE-SET FIELDS FOR USE IN A PRODUCT CHECK TEMPLATE

Pre-set fields allow you to create your own set of options or answers to questions so that these don't have to be manually created each time when building the template.

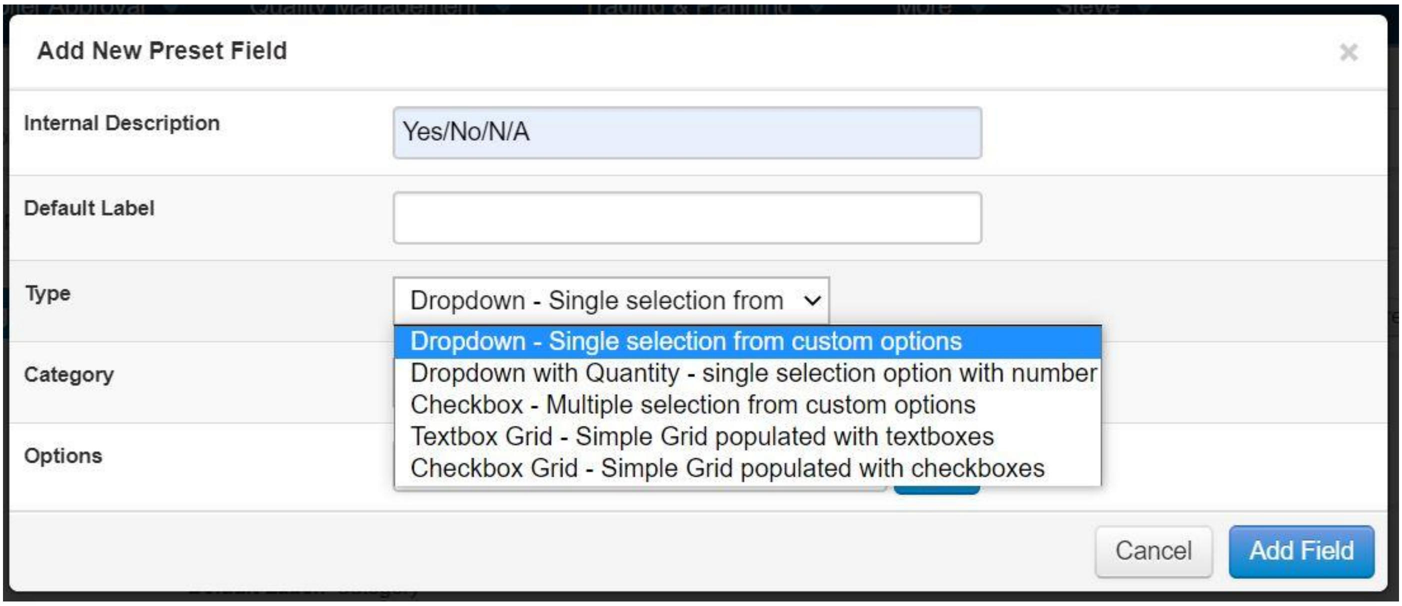
Step 1: Go to the ***Admin*** section of the Product Check Manager



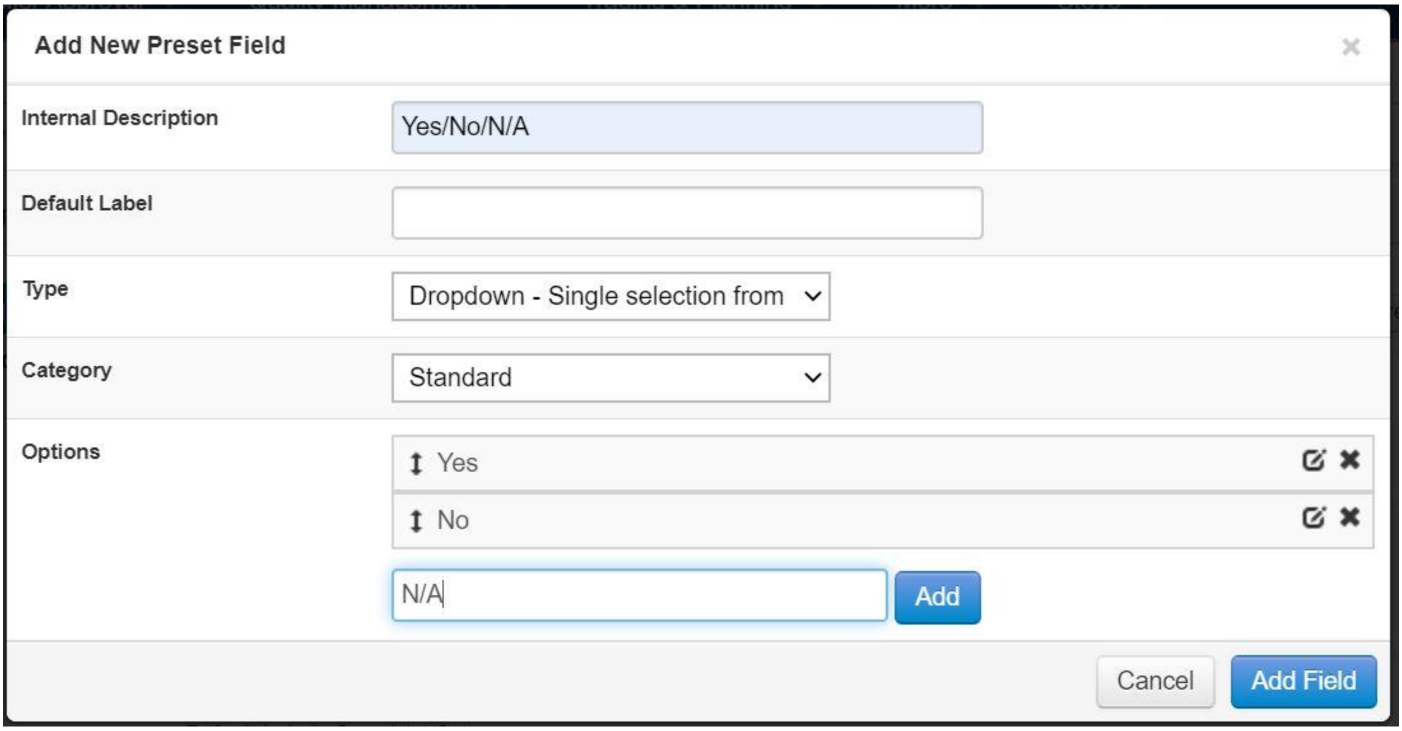
Step 2: To create a new set select ***Add New Preset Field***



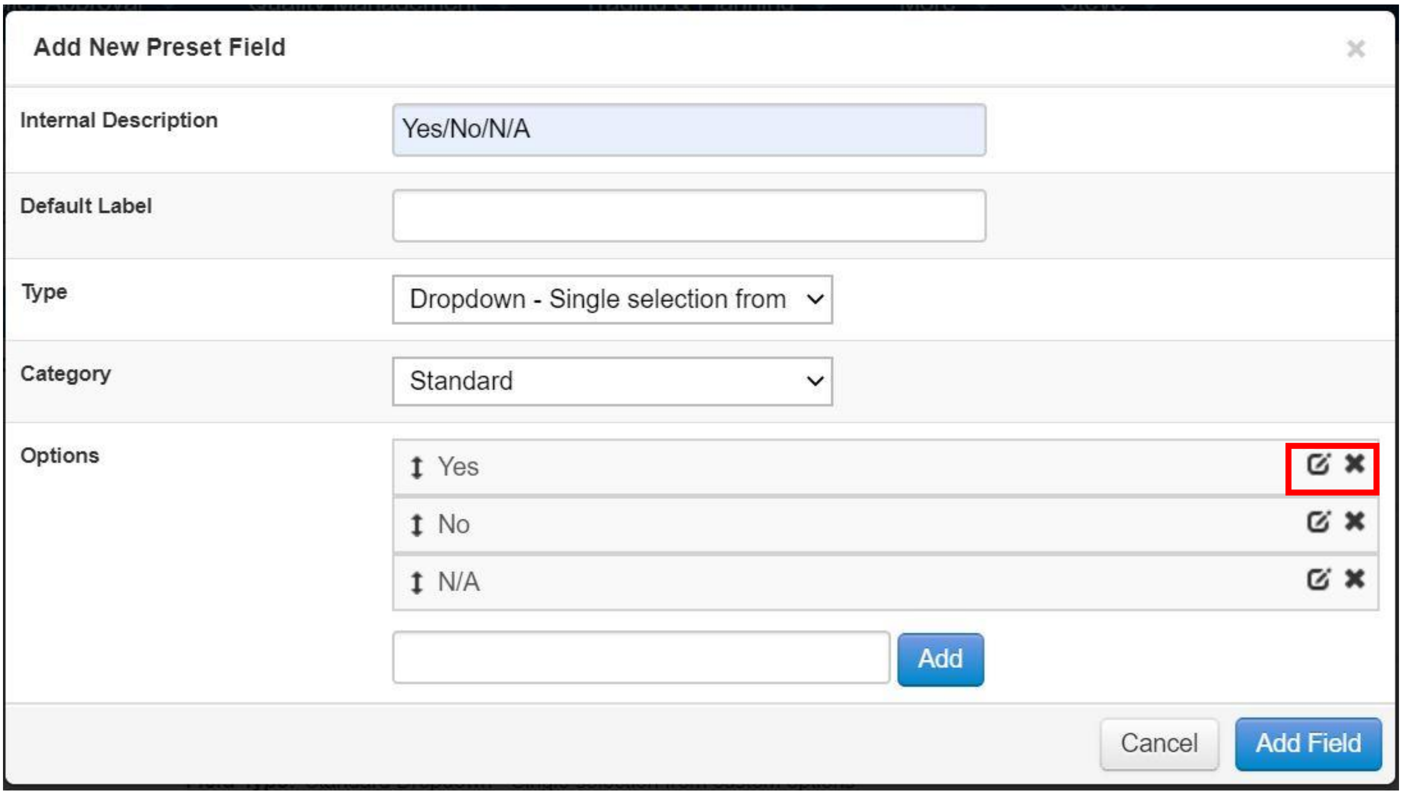
Step 3: Give the Pre-set field an ***Internal description.*** That is Yes/No/N/A. Then choose the ***Type*** of field it will be.



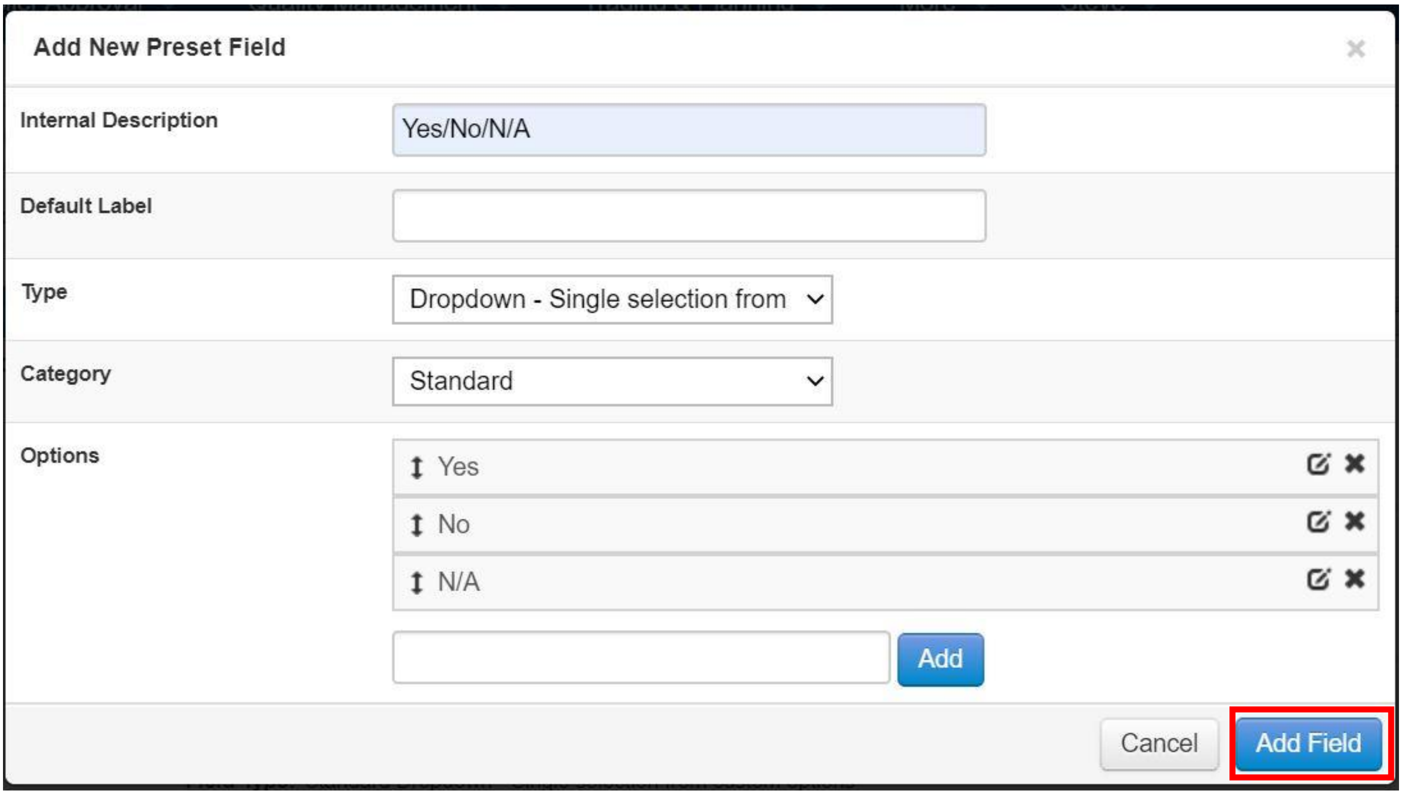
Step 4: If you have categories setup for these pre-set fields choose the ***Category*** it should sit under**.** Then add the pre-set field ***Options*** which in this instance are Yes, No, N/A.



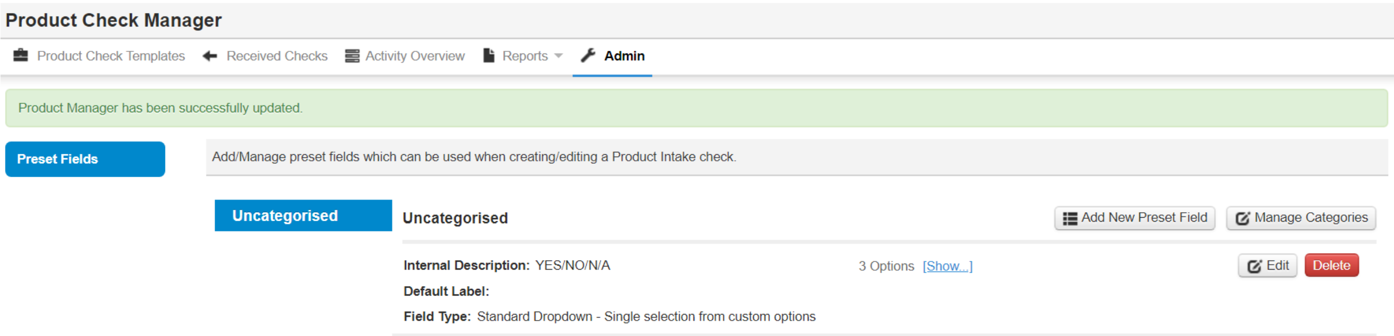
Step 5: If you need to edit or delete an option, choose edit icon or delete icon to do so.



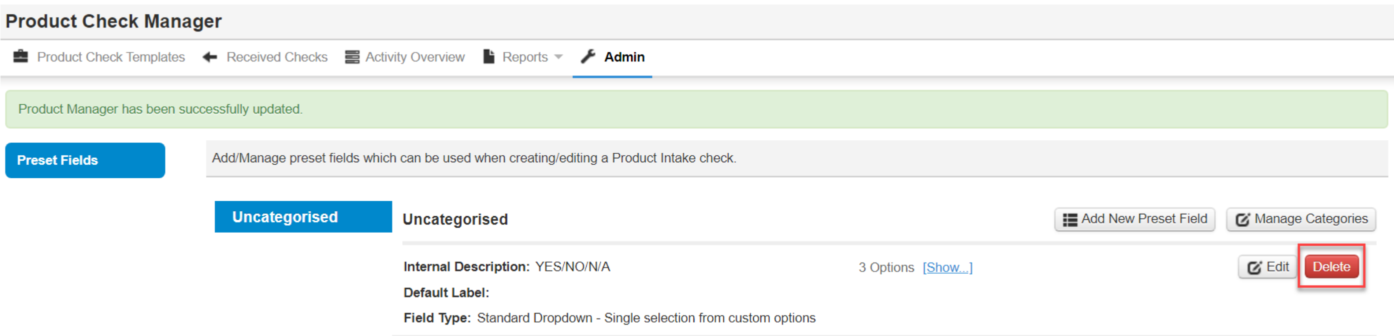
Step 6: Once done select ***Add Field***



Step 7: It will look like this in the ***Standard*** category.



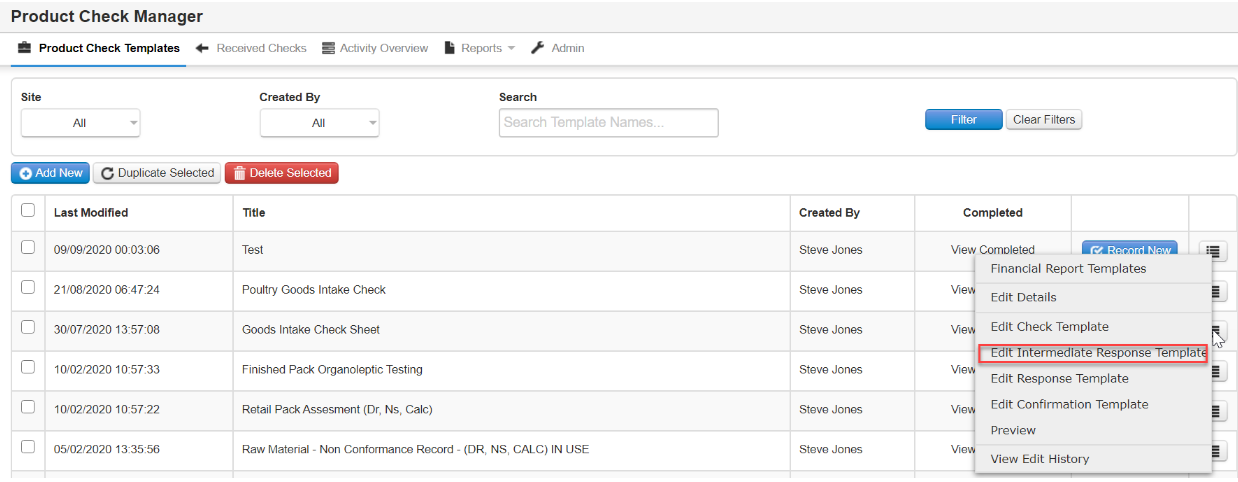
Step 8: To ***Edit*** select edit & follow steps above. And to delete simply select ***Delete***



2.2 HOW TO CREATE AN INTERMEDIATE TEMPLATE

An Intermediate template is the form that is used for your users to commence the building process of completing product checks across various sites.

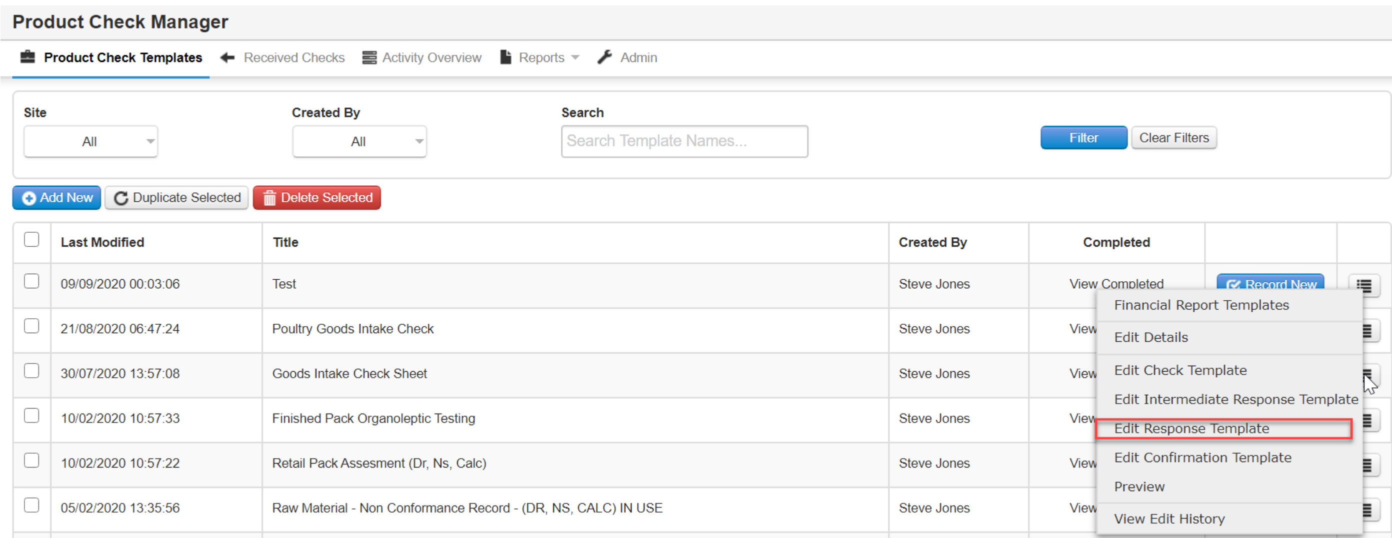
Step 1: Go back to the main table and select the radio button to the right of your check & select ***Edit Intermediate Template***



Step 2: Follow the steps above that you used to build the Check Template to build the Intermediate Template**.** The same functions are used.

2.3 HOW TO CREATE A RESPONSE TEMPLATE

Step 1: Go back to the main table and select the radio button to the right of your check & select ***Edit Response Template***

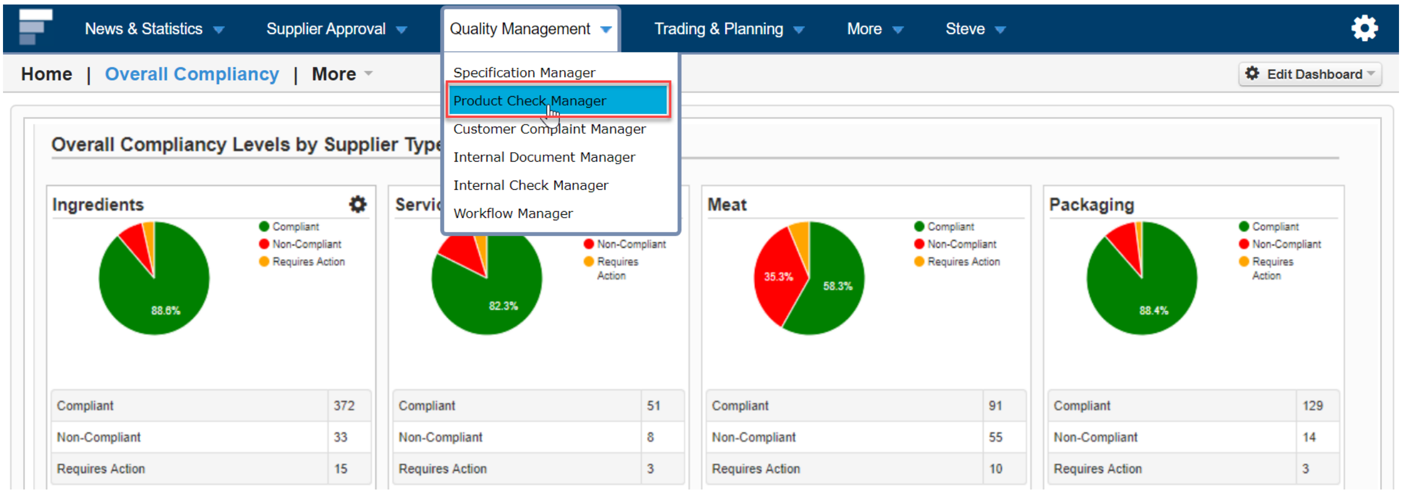


Step 2: Follow the steps above that you used to build the Response Template to build the Check Template**.** The same functions are used.

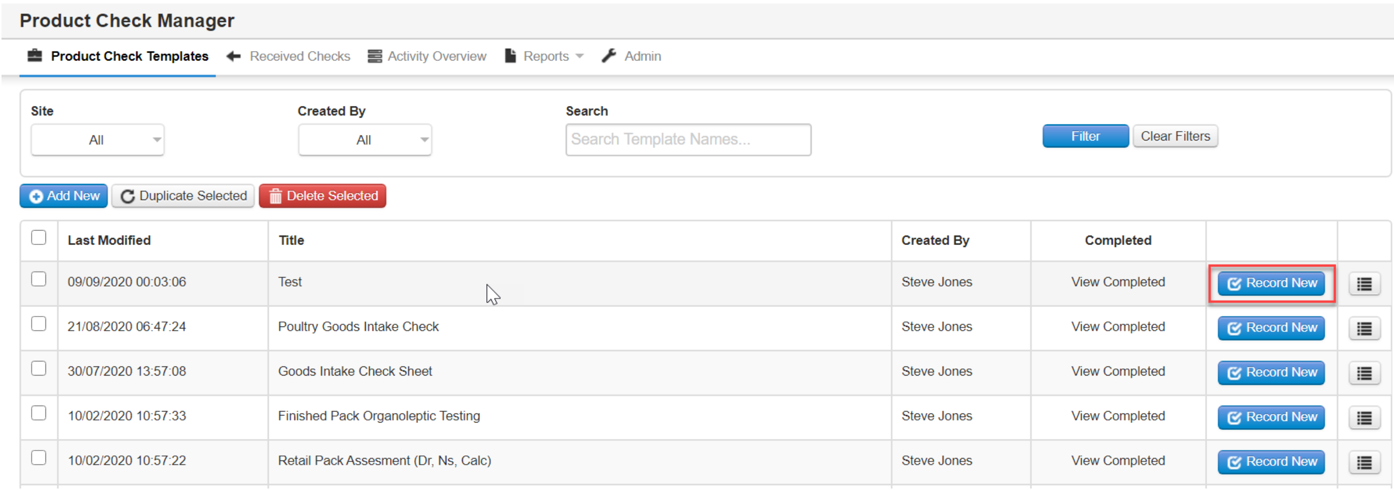
3. HOW TO RECORD A PRODUCT CHECK

3.1 HOW TO RECORD A PRODUCT CHECK

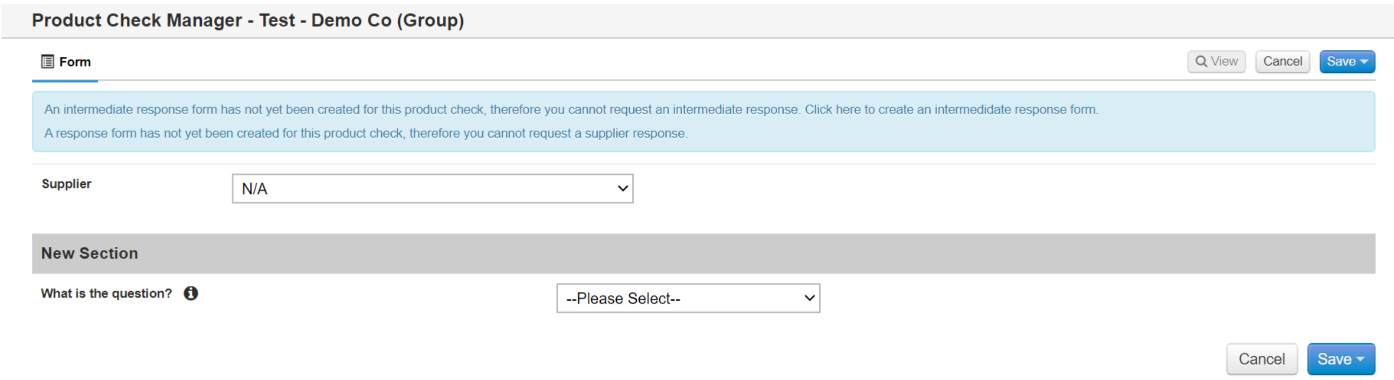
Step 1: Go to **PRODUCT CHECK MANAGER**



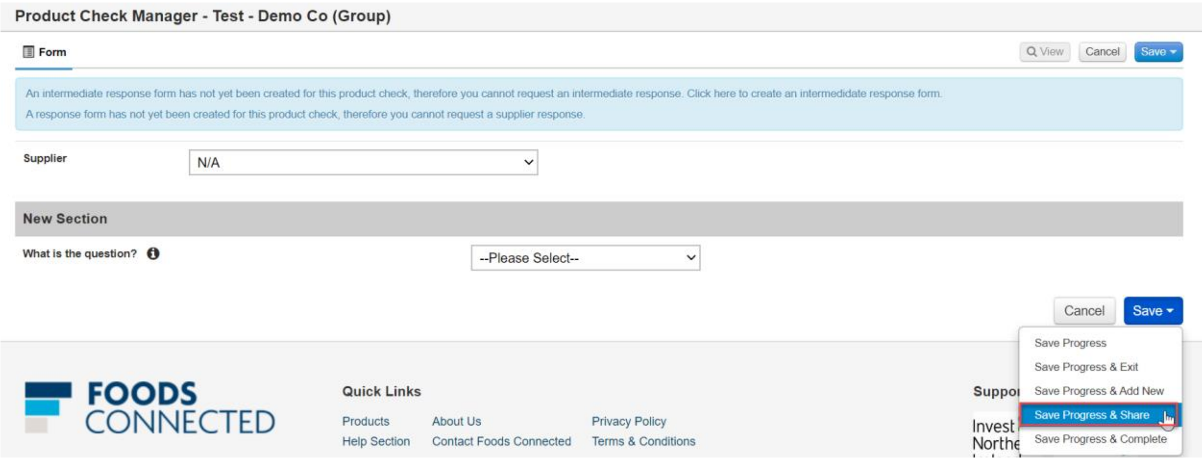
Step 2: Select ***Record New*** beside the form you want to use



Step 3: Select the customer **if you have a subscription to the Product Check Manager tool.**



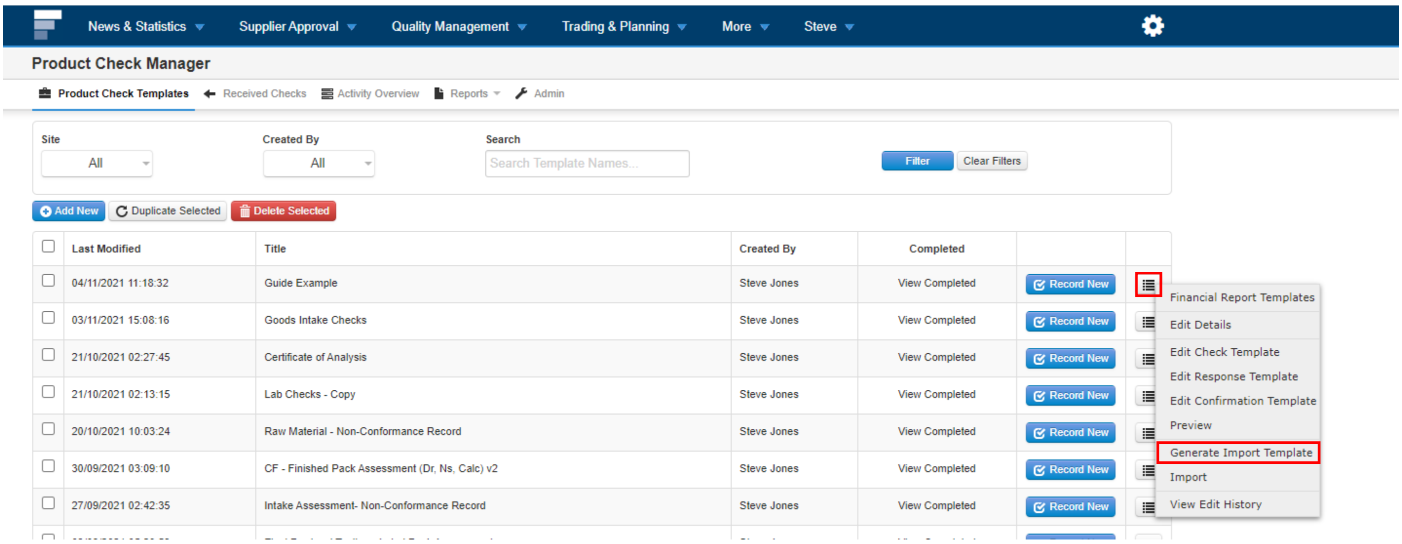
Step 4: Fil in your answers and complete then select ***Save*** then ***Save Progress & Share.*** This will then allow you to send the investigation template to a user within the business to complete.



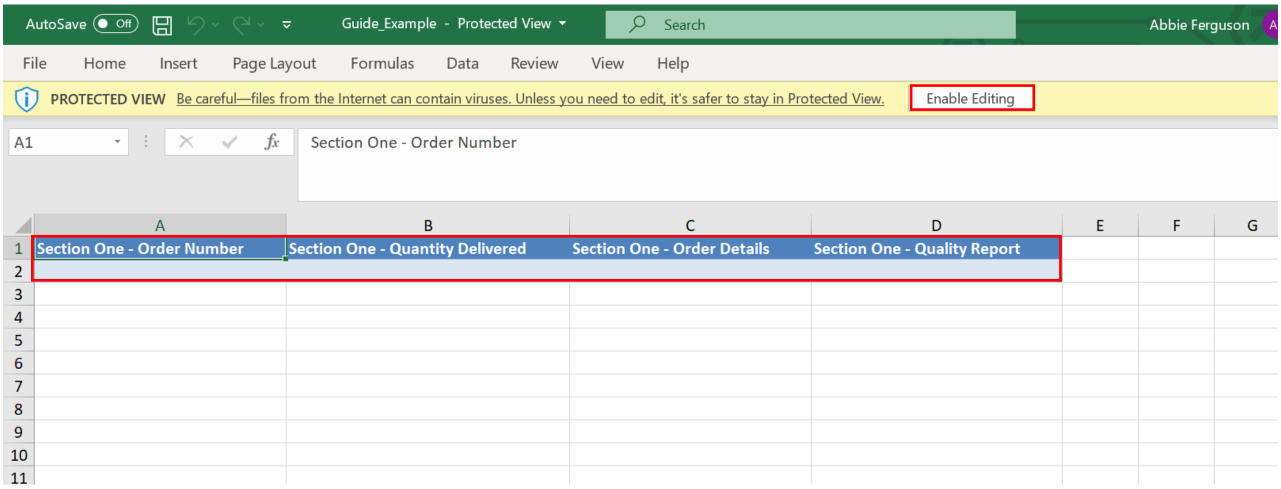
3.1.1 HOW TO BULK IMPORT PRODUCT CHECKS

This function is used when there are a large number of Product Checks to be completed.

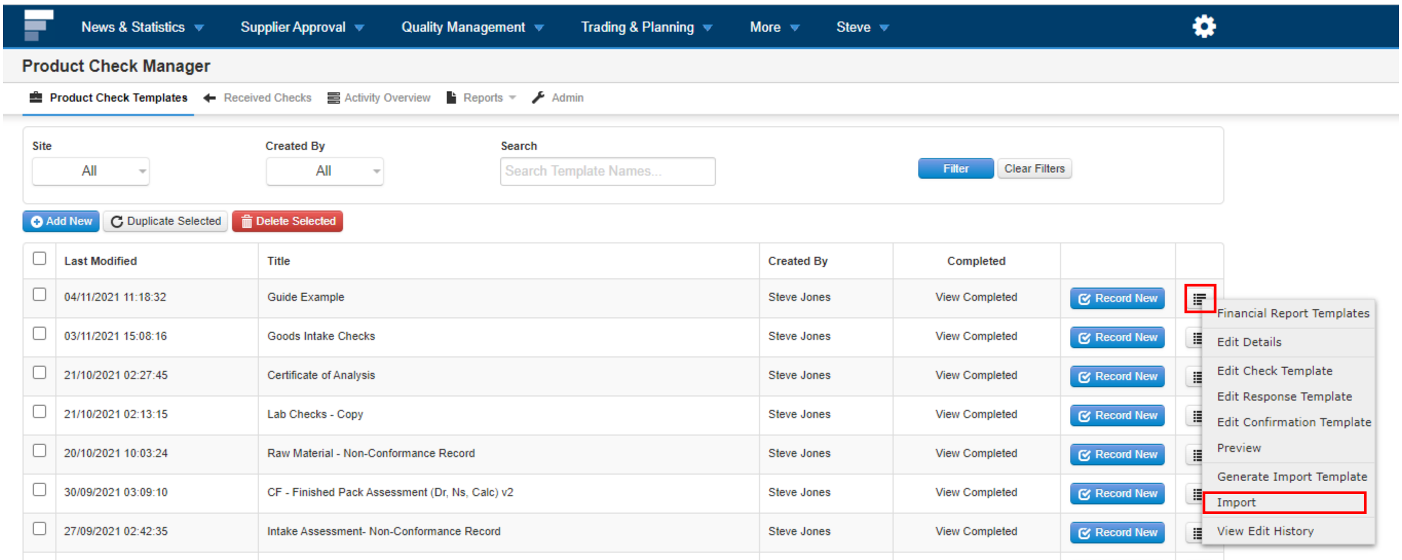
Step 1: After entering Product Check Manager (see *1. How to Access Product Check Manager*) and finding which check needs completed, select the menu button beside that check and click ***Generate Import Template.***



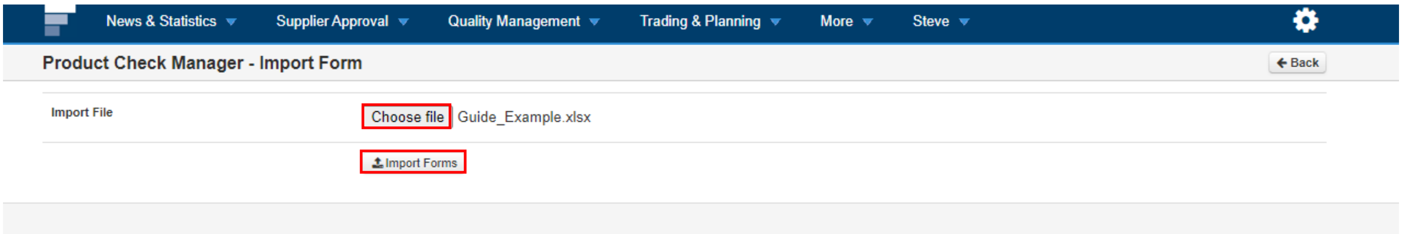
Step 2: The Import Template will be downloaded to your device – ***open the document***. The document will look similar to the one pictured below. Click ***Enable Editing***. ***Fill out each section*** as requested – each row will be a new check. ***Save*** the document.



Step 3: Return to Foods Connected and to the same page outlined in step 1. Click the ***menu*** and select ***Import***.

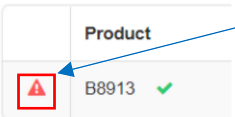


Step 4: Click ***Choose File*** and select your document. Then click ***Import Forms***.

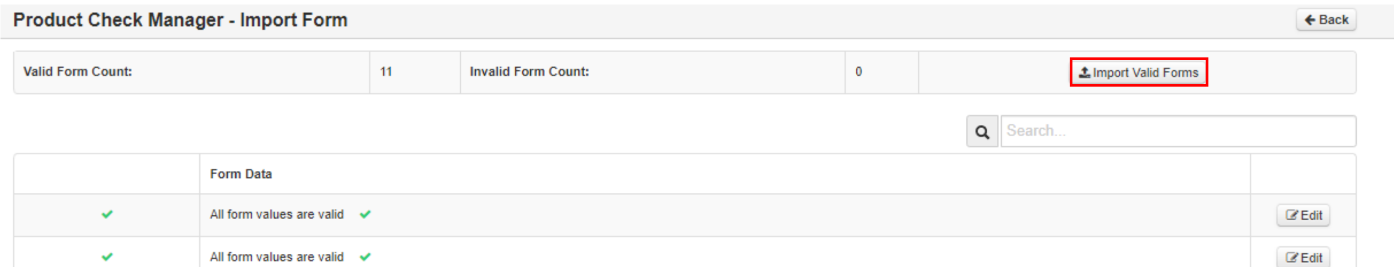


Step 5: It will then show you which form values are valid. The valid forms will be signified with a green tick as shown below. There is also a ***Valid*** and ***Invalid Form Count***.

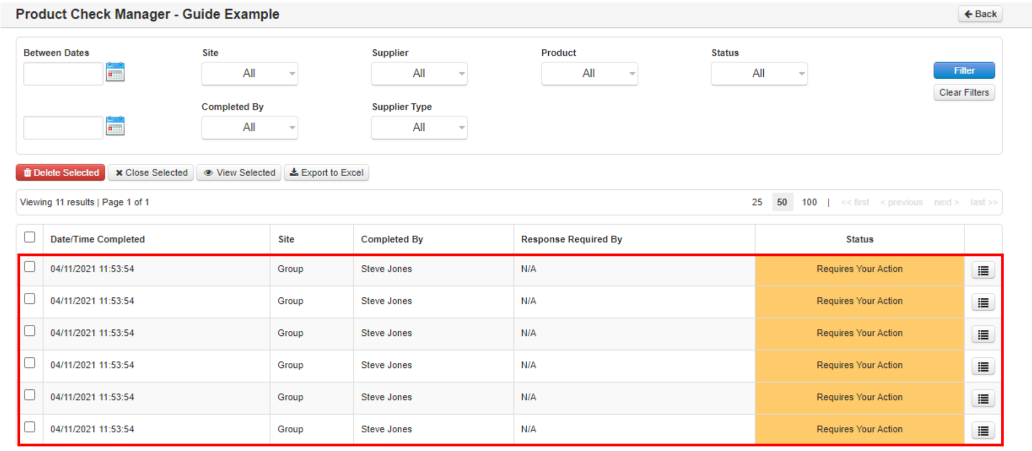
If any forms are invalid it will have a warning symbol. If the form is invalid, you can ***Edit*** it, as shown above.



Step 6: Once all forms are corrected (if necessary) and are valid, click ***Import Valid Forms***.

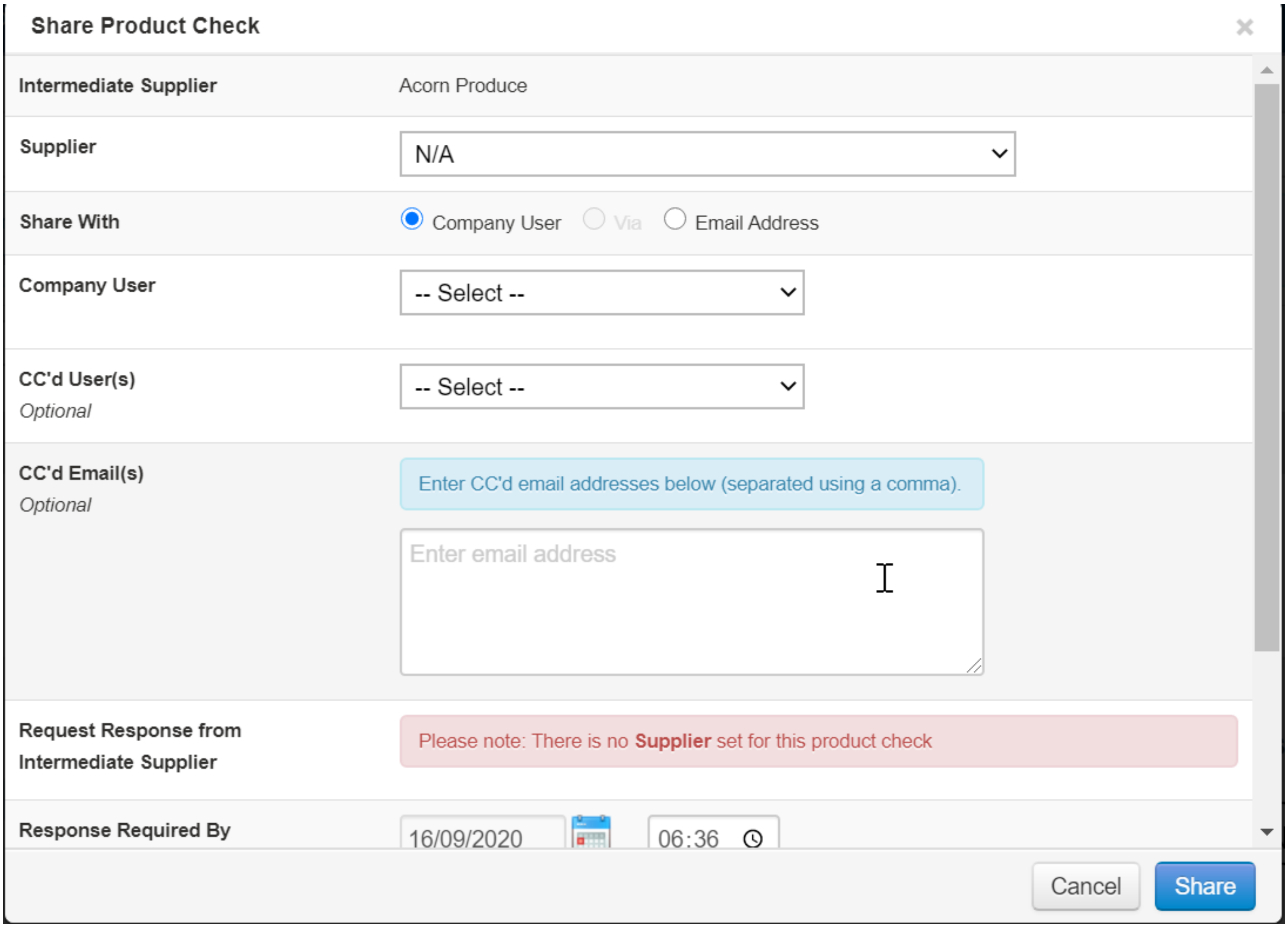


The import is complete and is ready to be checked. If you are reviewing/approving the Product Checks, please see section *3.3 How to Approve a Product Check*. If you wish to share the Product Check please see section *3.1.2. How to Share and Request More Information*.



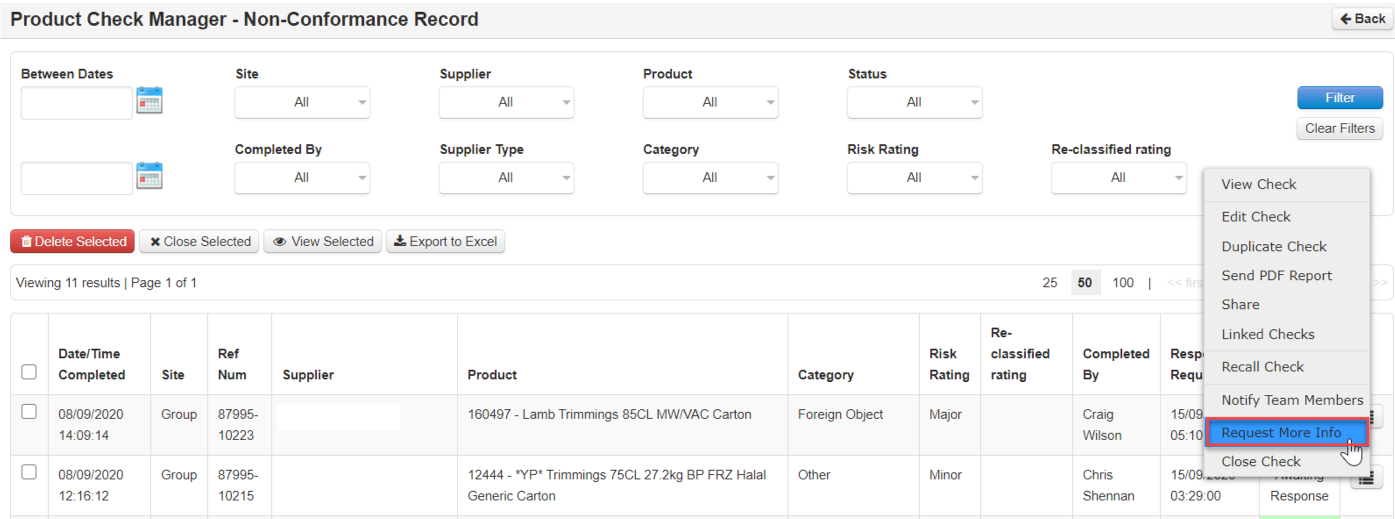
3.1.2 HOW TO SHARE A PRODUCT CHECK AND REQUEST MORE INFORMATION

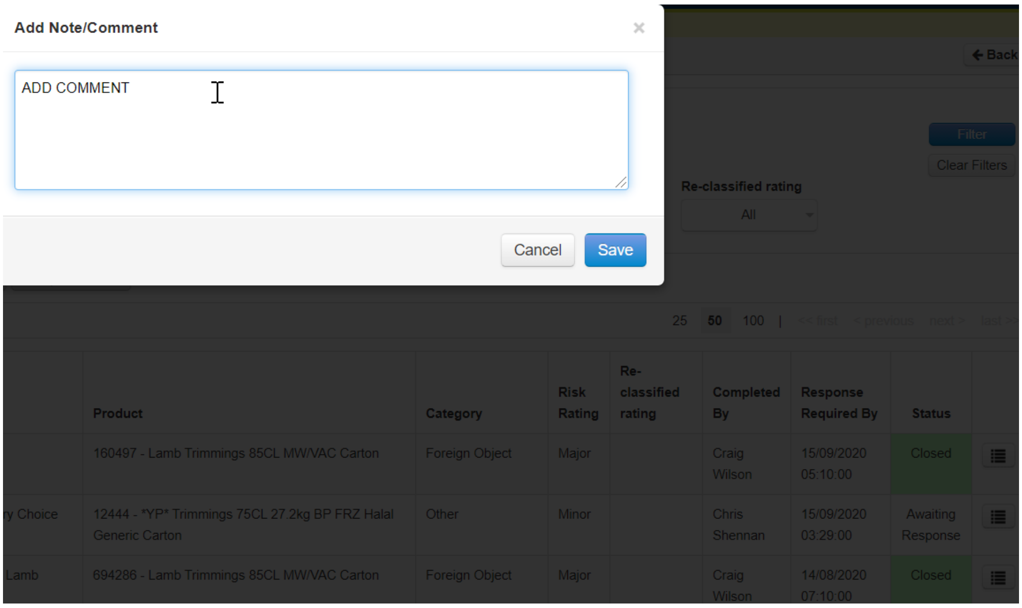
Step 1: After you select Save & Share above, Select a ***Company User*** to share with who will complete the investigation, then select a ***Respond By Date***. once done select ***Share***



Step 2: The ***Status*** will revert to ***Awaiting Response*** ready for the user to complete.

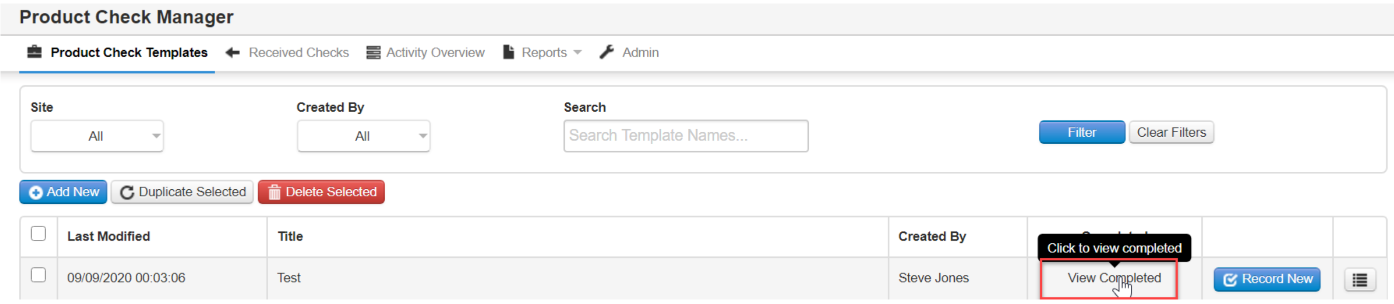
Step 3: To Request More Information. Right Click against the CHECK. Select Request More Info. This will Open a dialogue box to directly send a message to accompany the check.



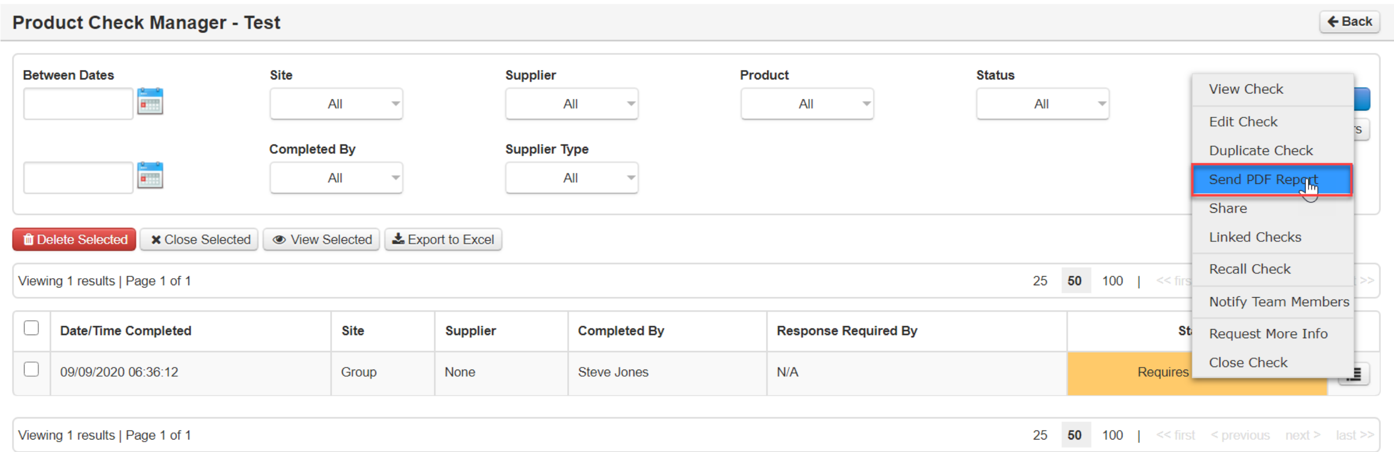


3.1.3 HOW TO SEND A PDF REPORT OF A PRODUCT CHECK

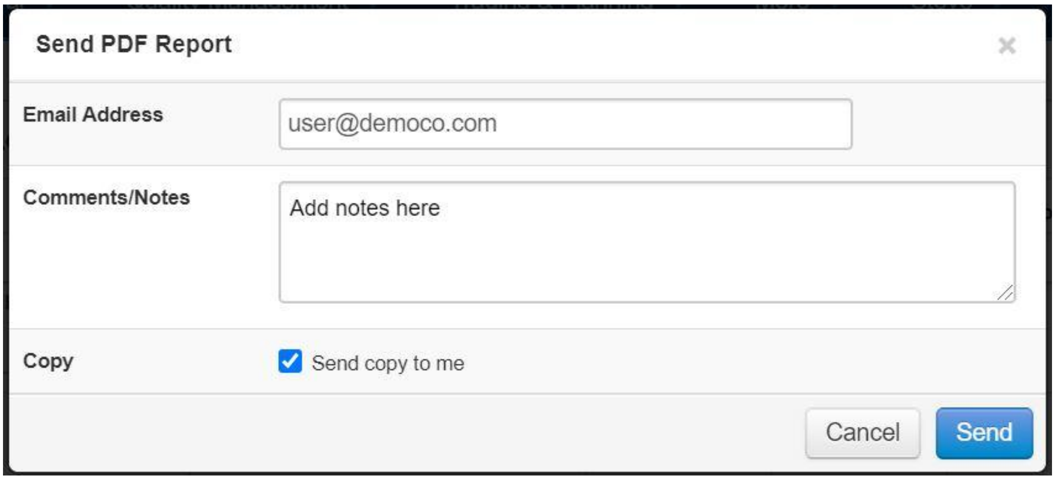
Step 1: On the Product Check Manager, select View Completed of the view the checks you want to send.



Step 2: Now select the check you want to send the report of then select ***Send PDF Report***

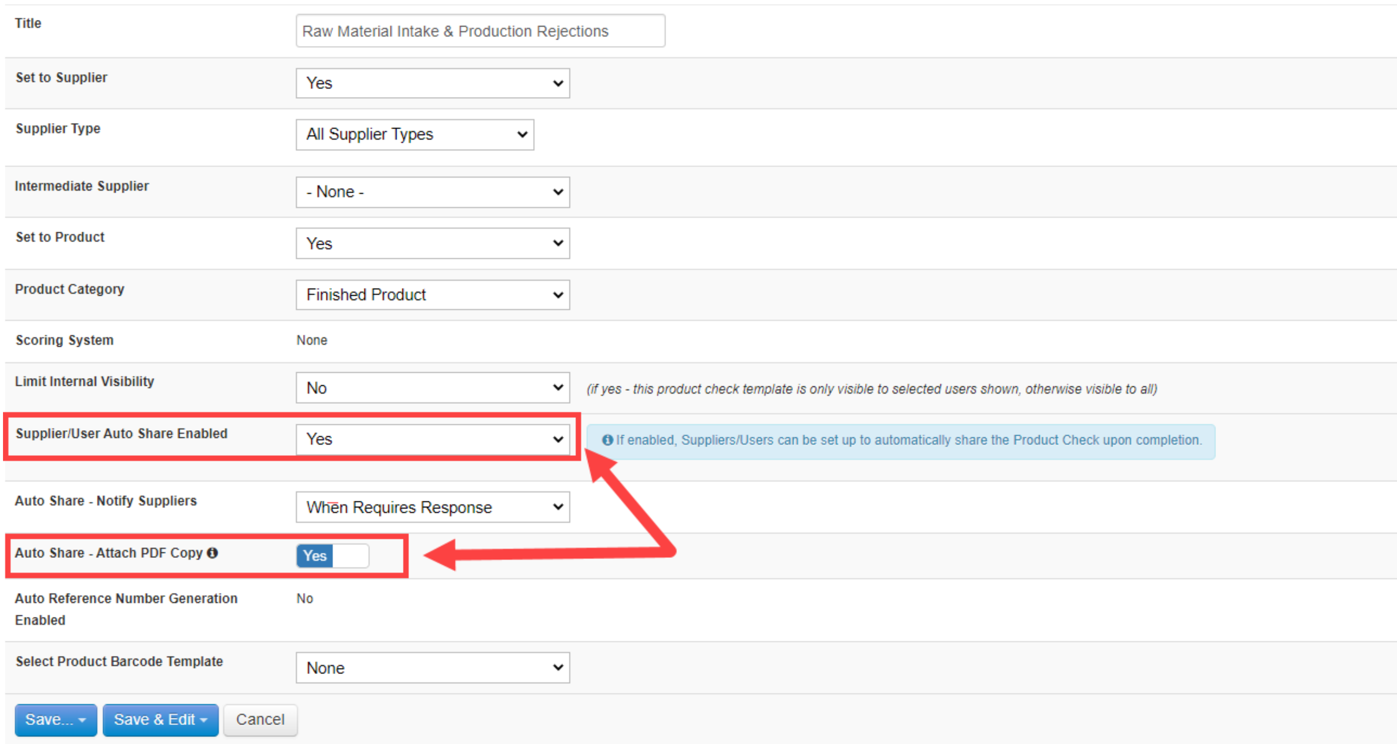


Step 3: Add an email address, any notes. Once done select ***Send***



Step 4: Setup Auto share of PDF report:

Within “Edit details” for a product check template, its possible to setup an auto share of a PDF for completed check templates. When turned on, this will attach a PDF copy to supplier recipients email notifications, when Auto Share is set up.



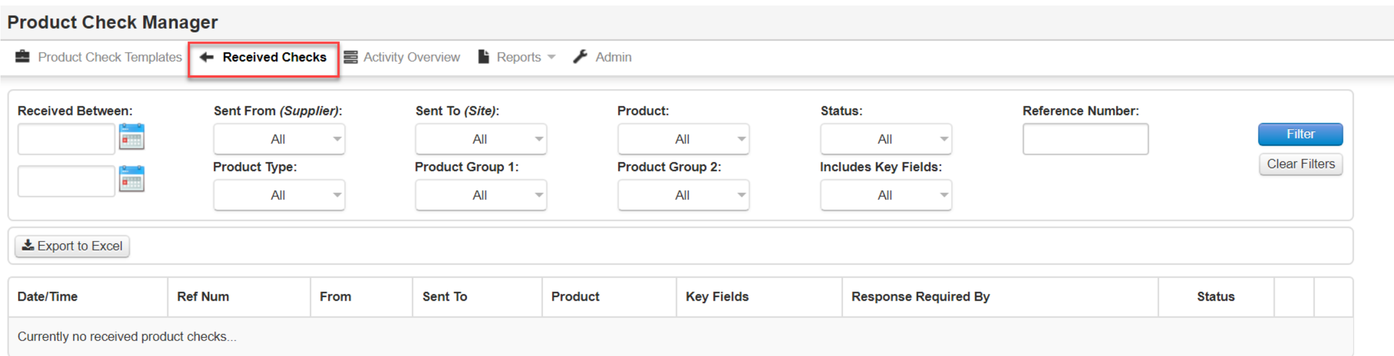
3.2 HOW TO RESPOND TO A PRODUCT CHECK ASSIGNED TO YOU

3.2.1 HOW TO VIEW THE PRODUCT CHECK DETAILS

Step 1: The user who has to complete the product check will get an email notification and a notification in their task manager like this. Select this task

Or they can go to ***Received Product Checks*** in the ***Product Check Manager Tool*** and see that a CHECK requires their action

Step 2: Select View to review & close when done



Step 3: The product check details will now show. Close when done.

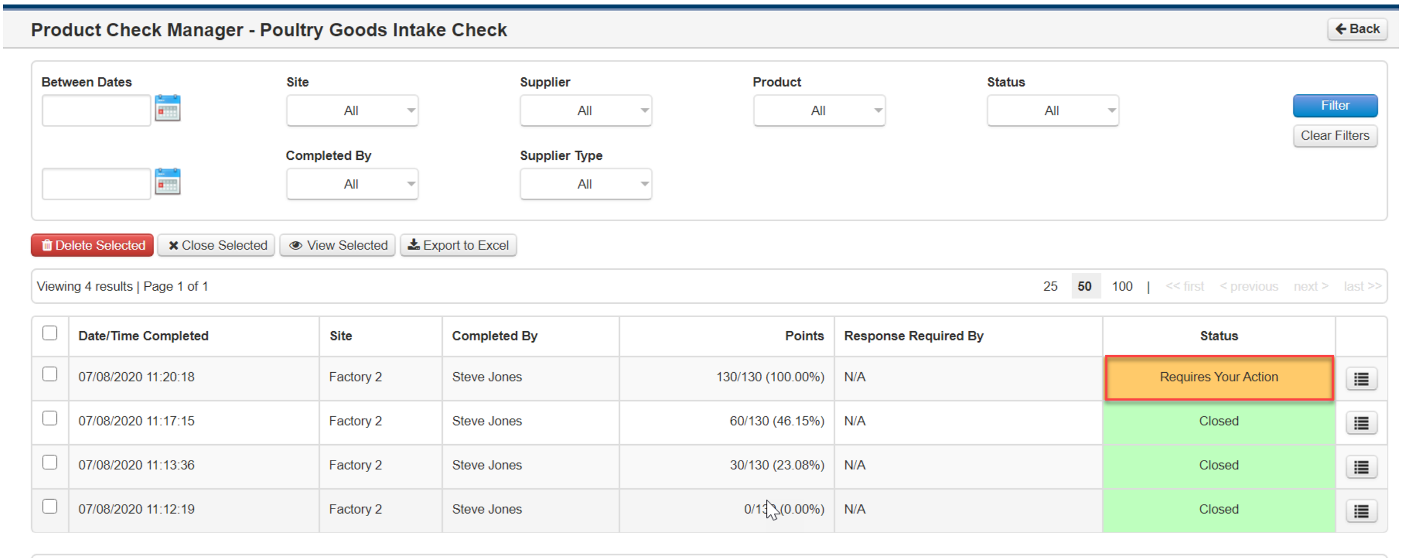
3.2.2 HOW TO COMPLETE THE CHECK TEMPLATE

Completing the Product Check is down to the user who is responsible for that area

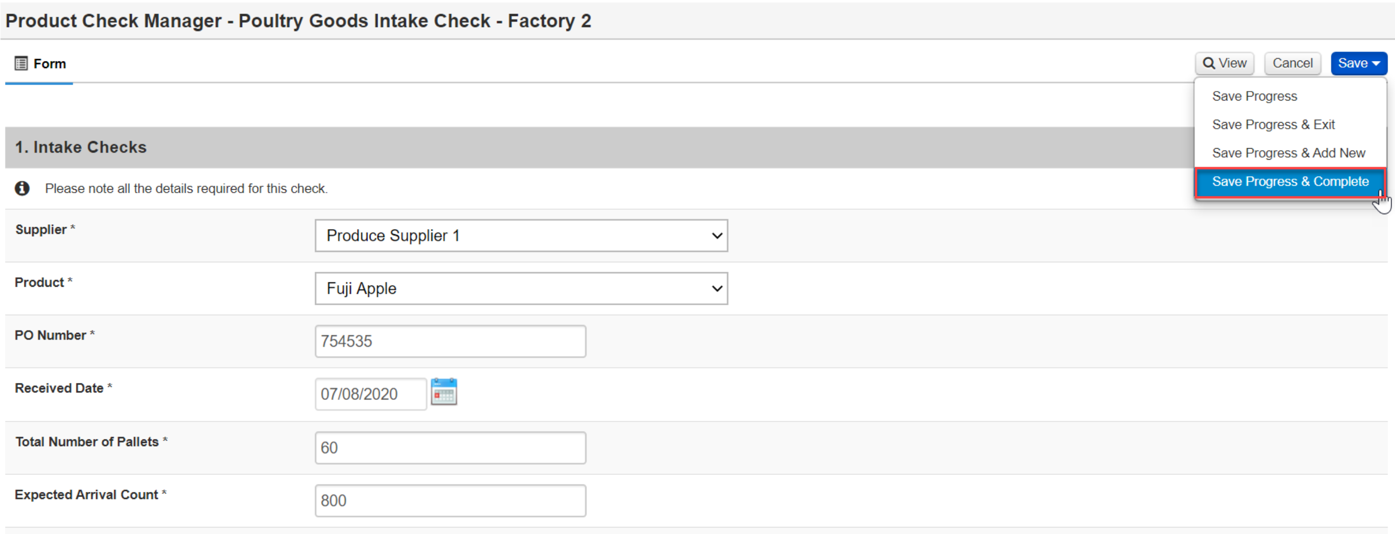
Step 1: The user who has to complete the check will get an email notification and a notification in their task manager.

Or they can go to ***Received Product Checks*** in the ***Product Check Manager*** and see that a check requires their action

Step 2: Then select ***View Check***

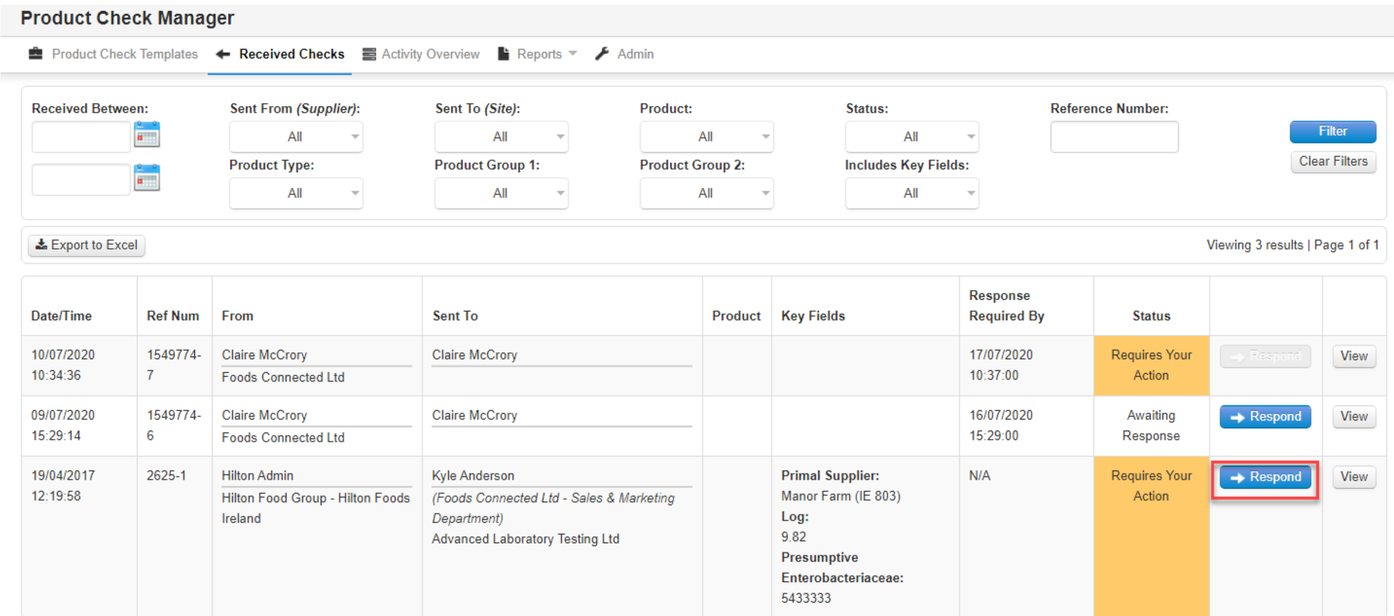


Step 3: Fill in details then select ***Save Progress & Complete***



3.2.3 HOW TO SEND A PRODUCT CHECK BACK FOR APPROVAL

Step 1: Go to ***Received Checks*** in the ***Product Check Manager tool*** and you can see that a product check requires your attention. Select ***Respond***



Step 2: Fill in details then select ***Save*** & ***Save & Send Response***

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

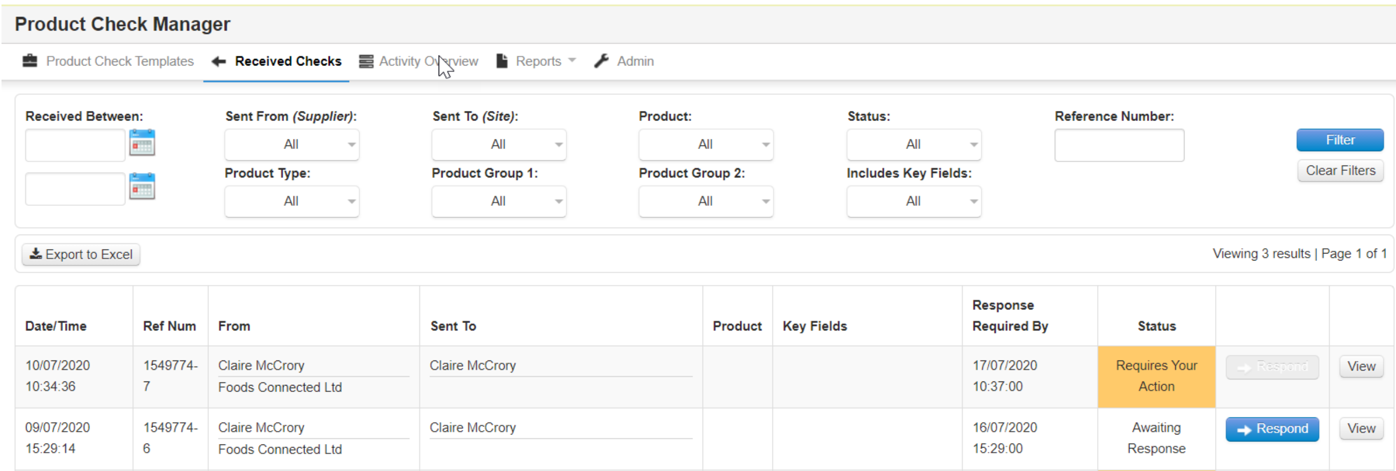
3.3 HOW TO APPROVE A PRODUCT CHECK

Once sent to the user the status will change to ***Awaiting Response*** again and will follow the steps above

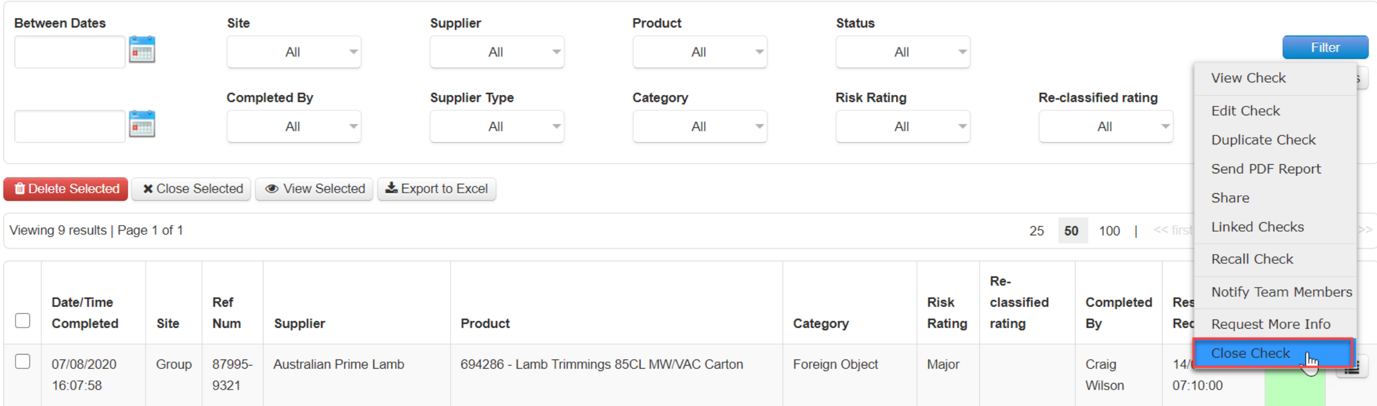
3.3.1 HOW TO CONFIRM & CLOSE A PRODUCT CHECK

Once you have finished the steps above and are happy with the responses, your next steps are now to confirm and close the Product Check

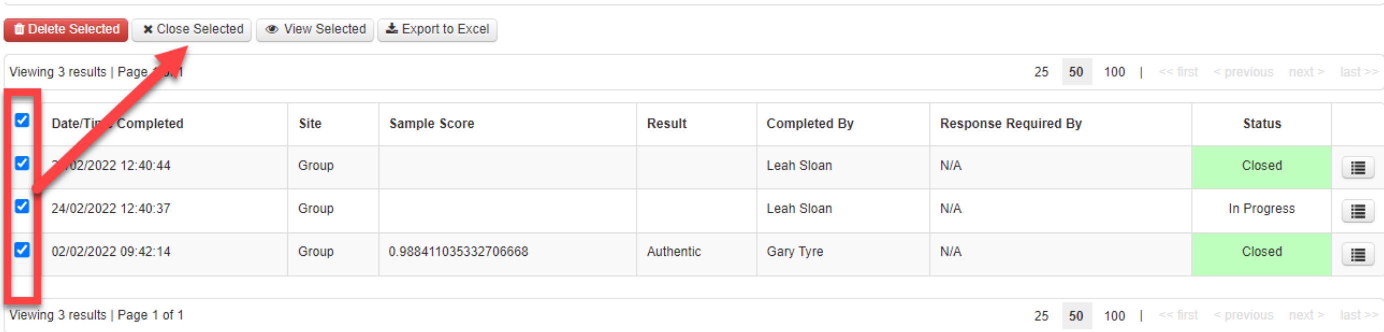
Step 1: After the above the status changes to ***Requires Your Action.***



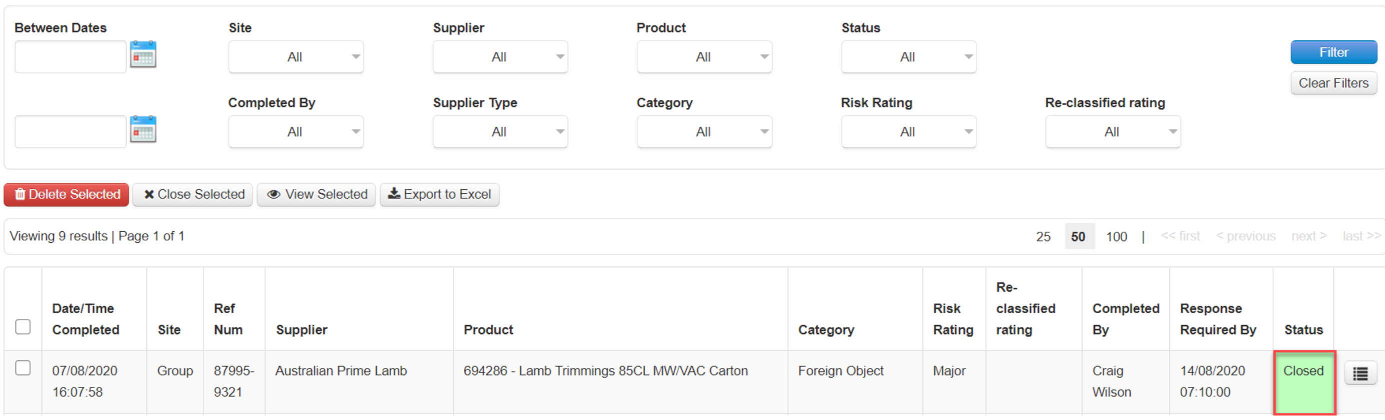
Step 2: Click on the check to open the options and select **Close Check**



Step 3: To bulk close checks, click the checkboxes and hit "Close selected". This will also be logged in the "Activity Overview" tab within the tool, creating a log for each check separately with the name of the user who closed.

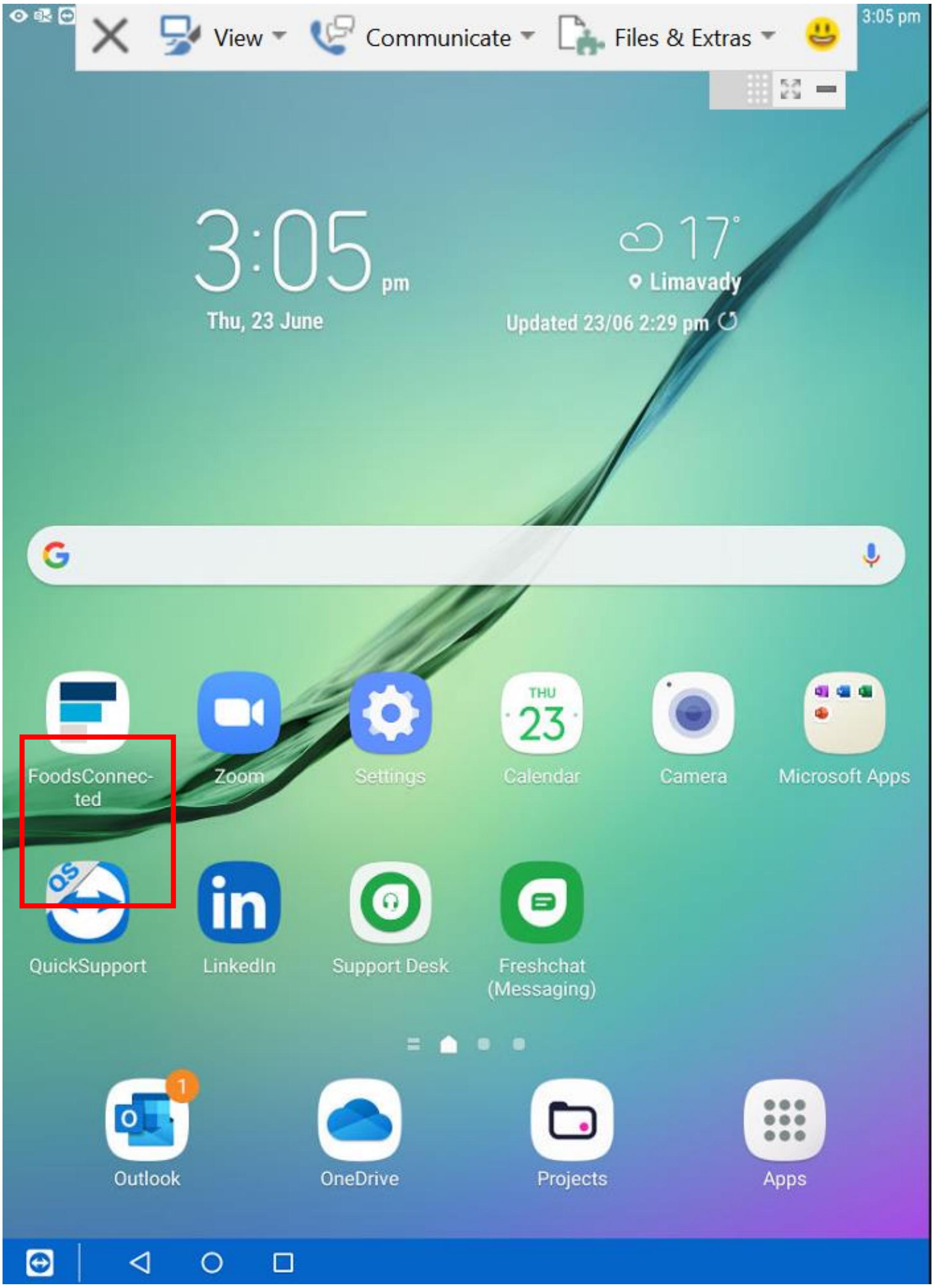


Step 4: That is the check complete and the ***Status*** reverts to ***Closed***

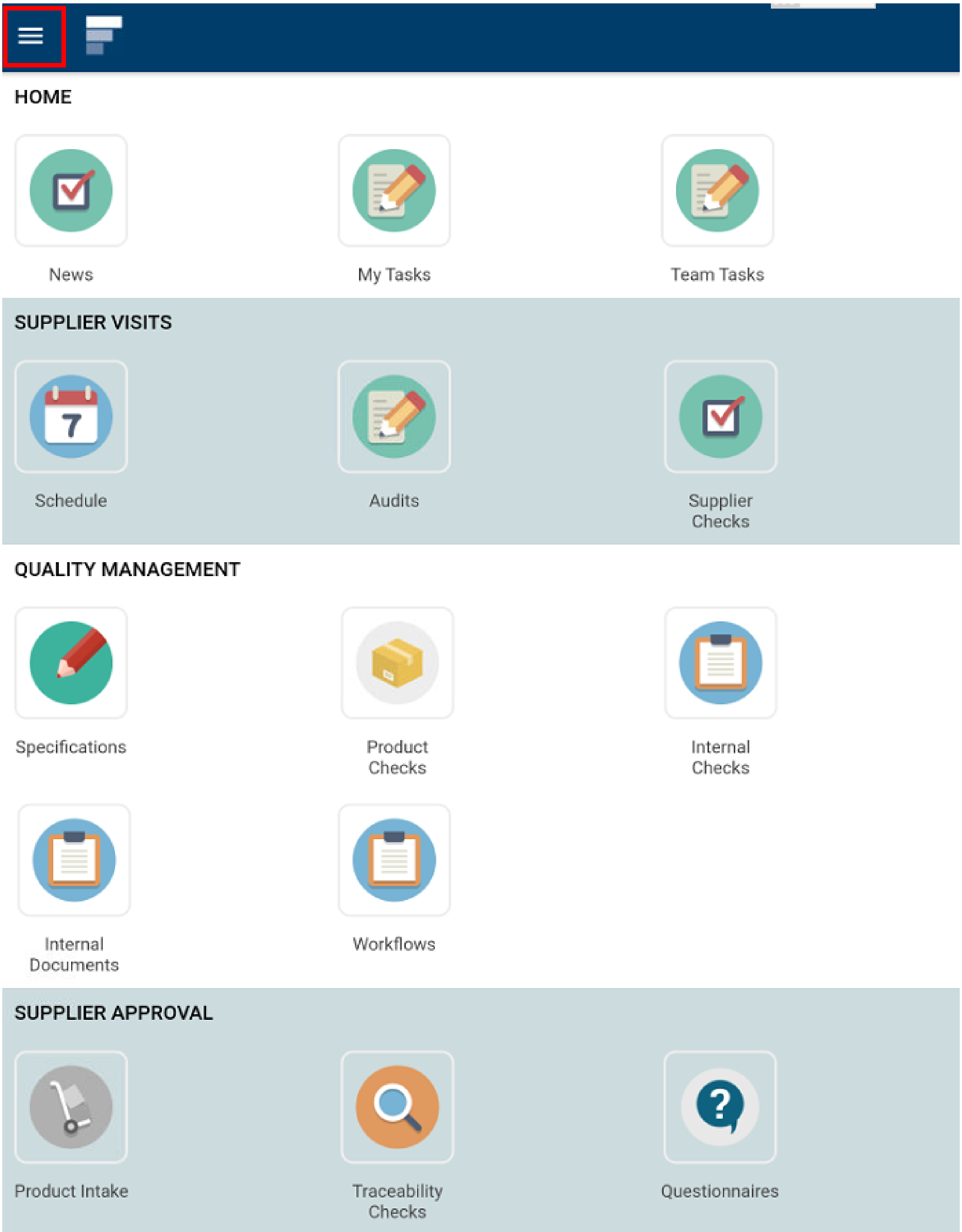


4. HOW TO RECORD A PRODUCT CHECK ON THE TABLET

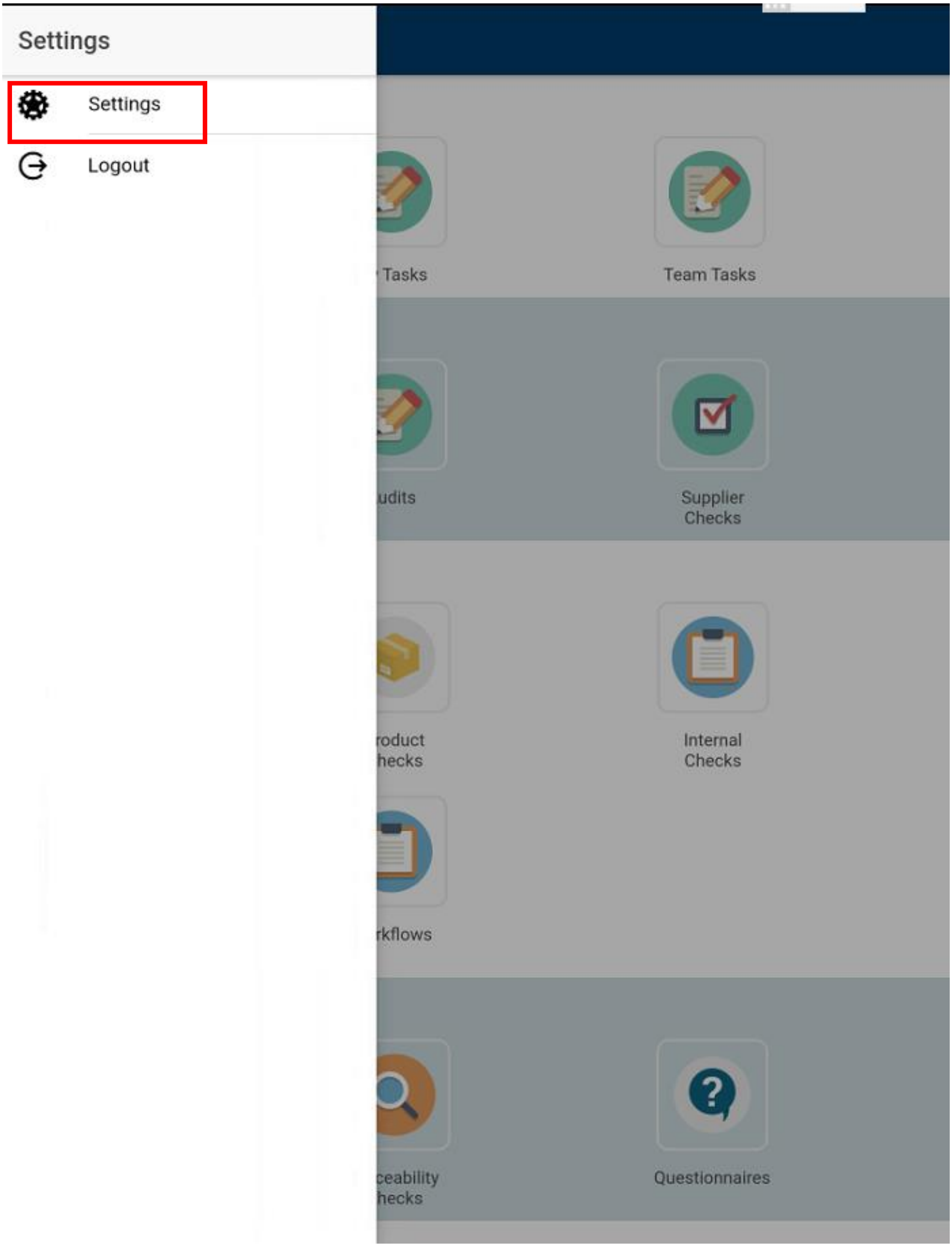
Step 1: Sign in on your tablet



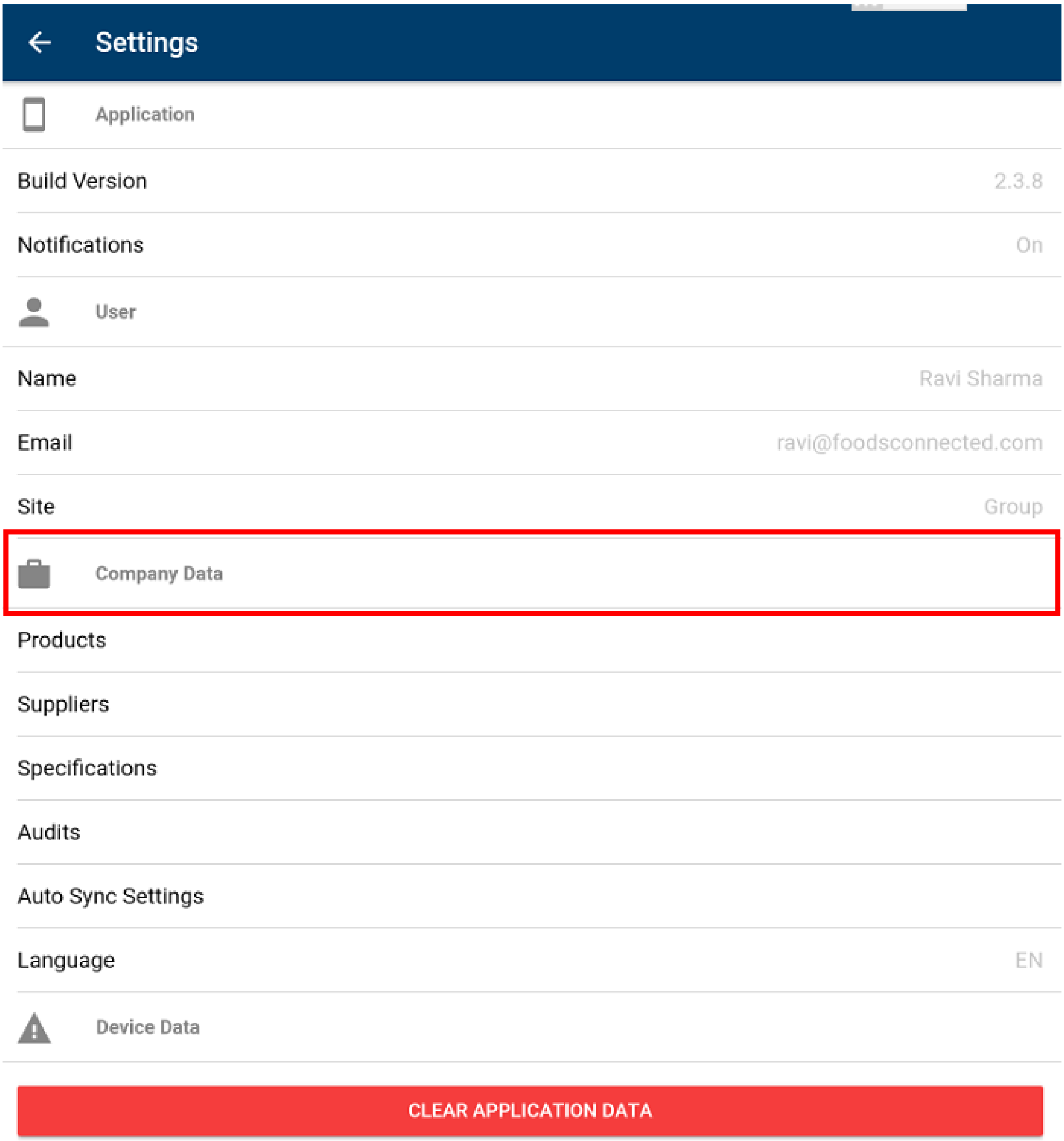
Step 2: Now select the settings icon



Step 3: Now select **Settings**



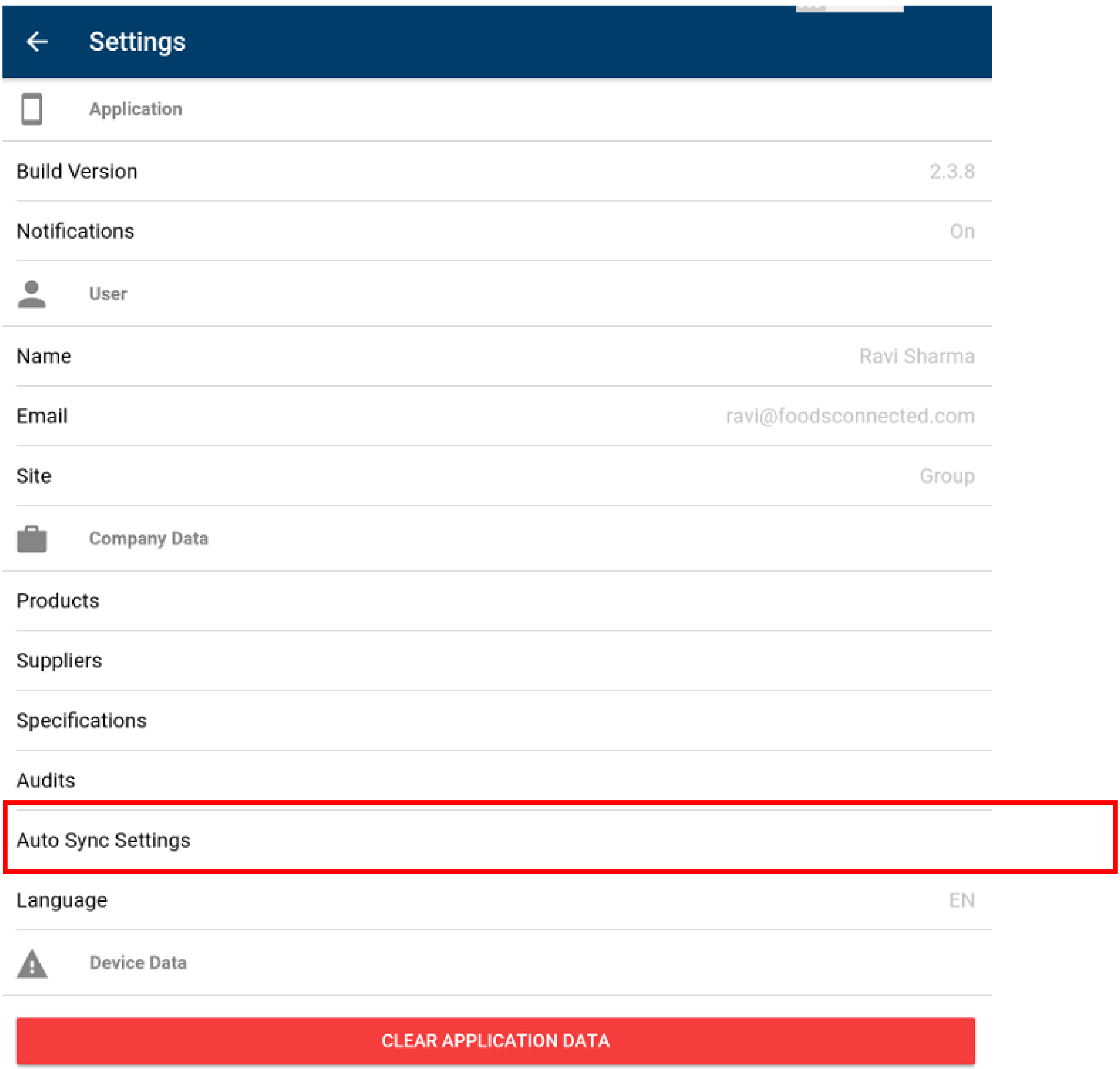
Step 4: Navigate to **Site** and select



Step 5: Now select your site then **Save**

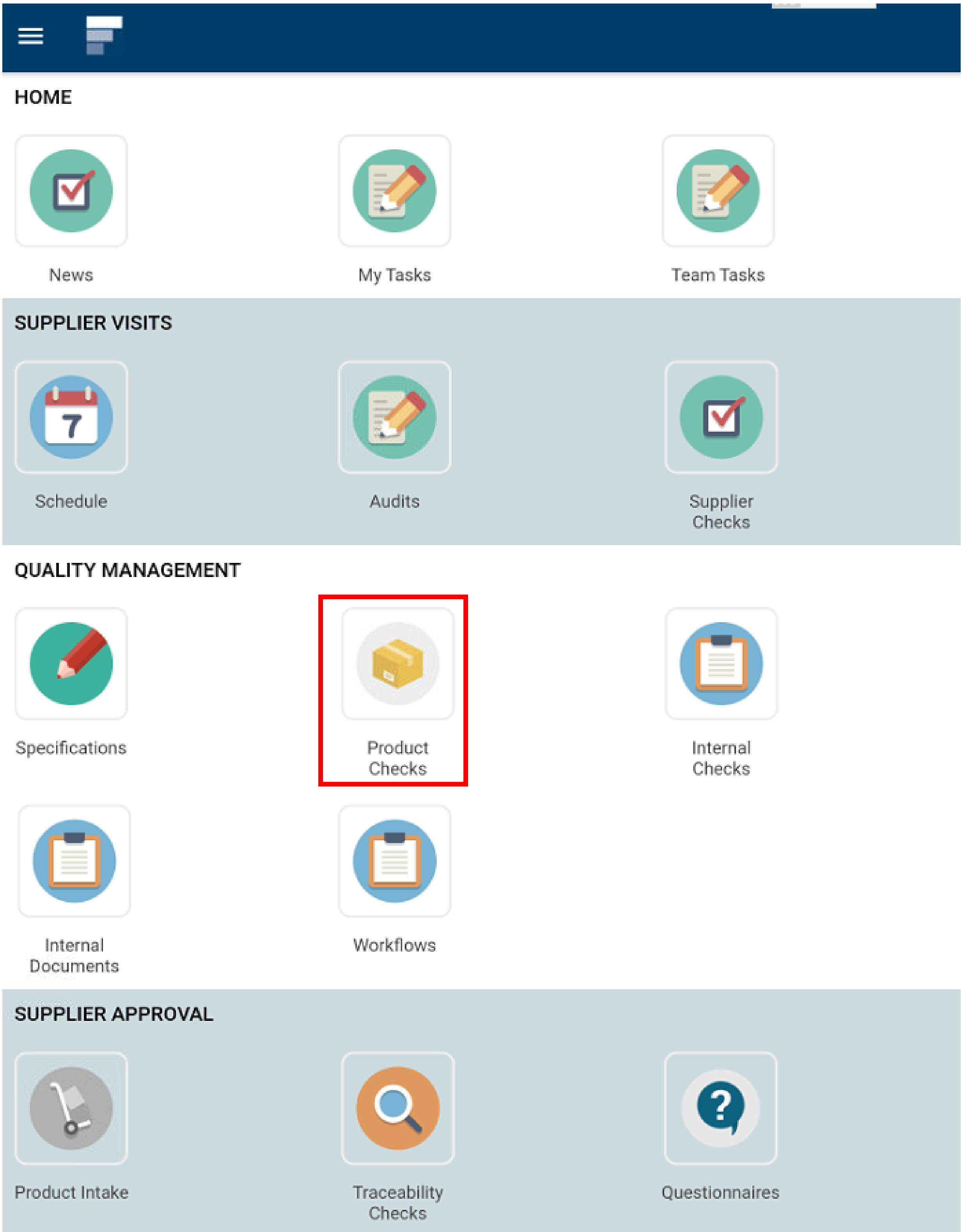
FOODS CONNECTED

Step 6: Now navigate to **Auto Sync Settings**

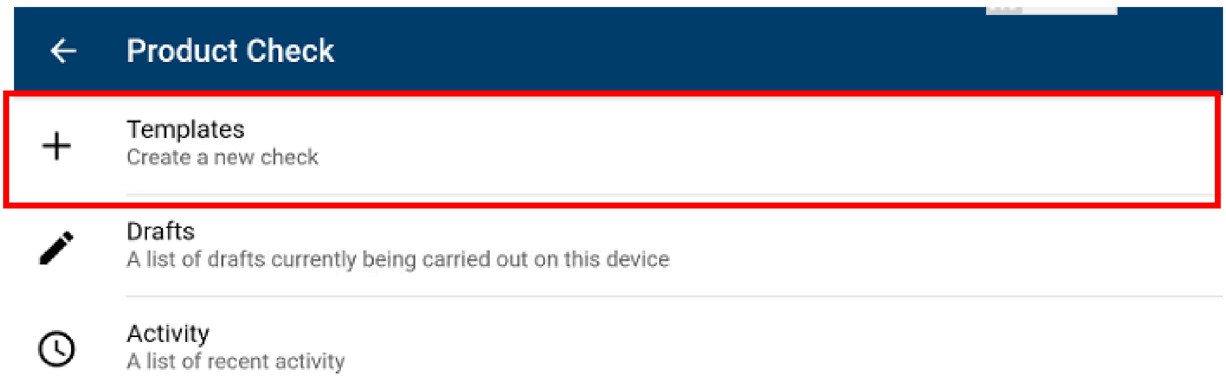


Step 7: Turn on **Company Product**, **Company Suppliers** & **Product Check Templates.** This is so every time you log in on your tablet all suppliers, products & templates will download to your tablet so you can perform checks offline.

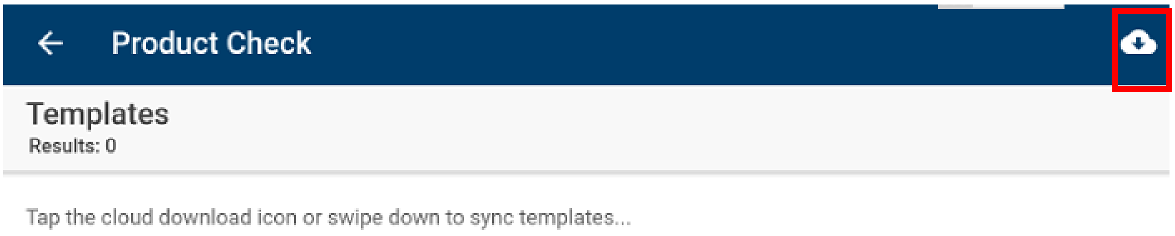
Step 8: Select back & back until you get to the tablet homepage. Now select **Product Checks**



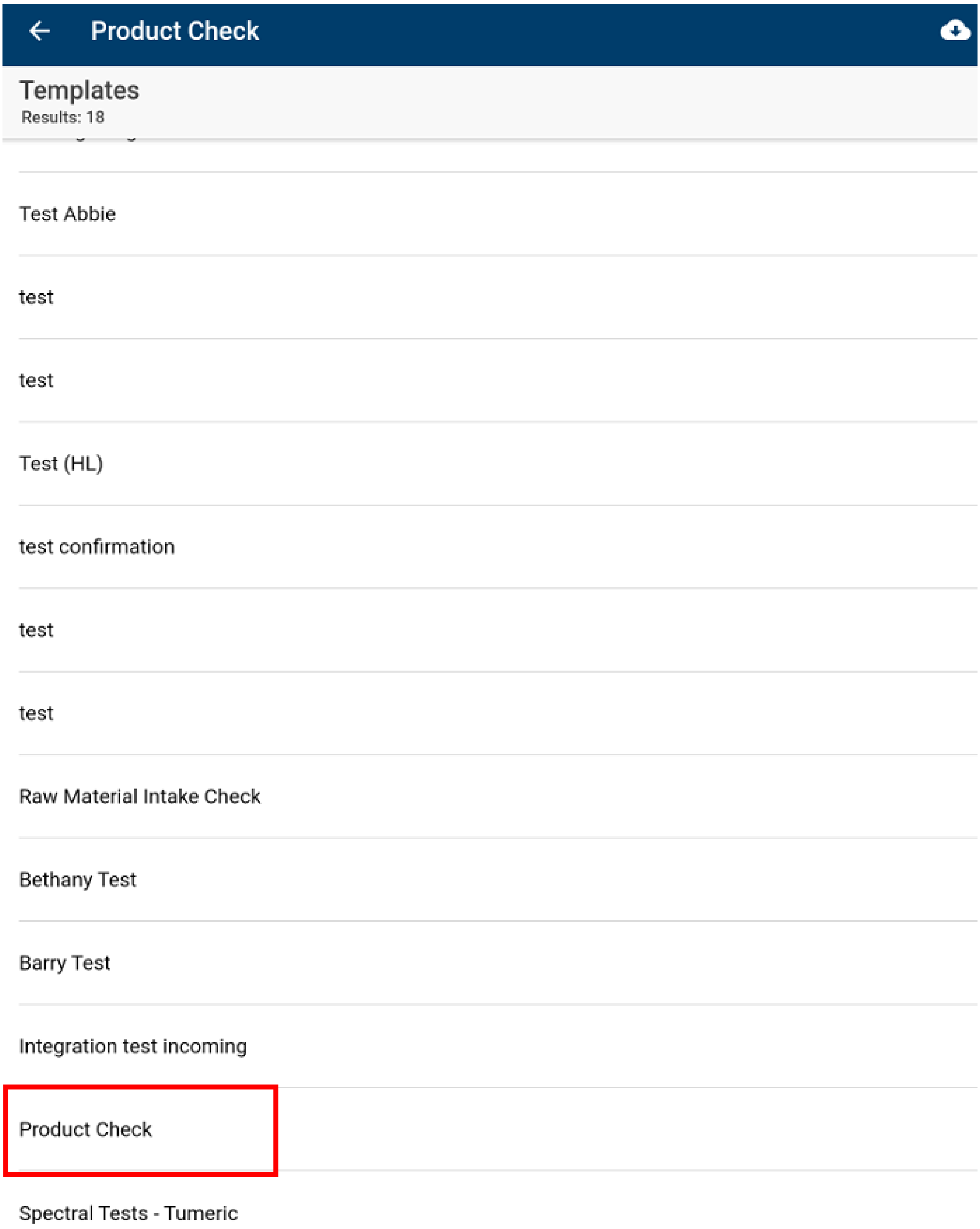
Step 9: Select **Templates**



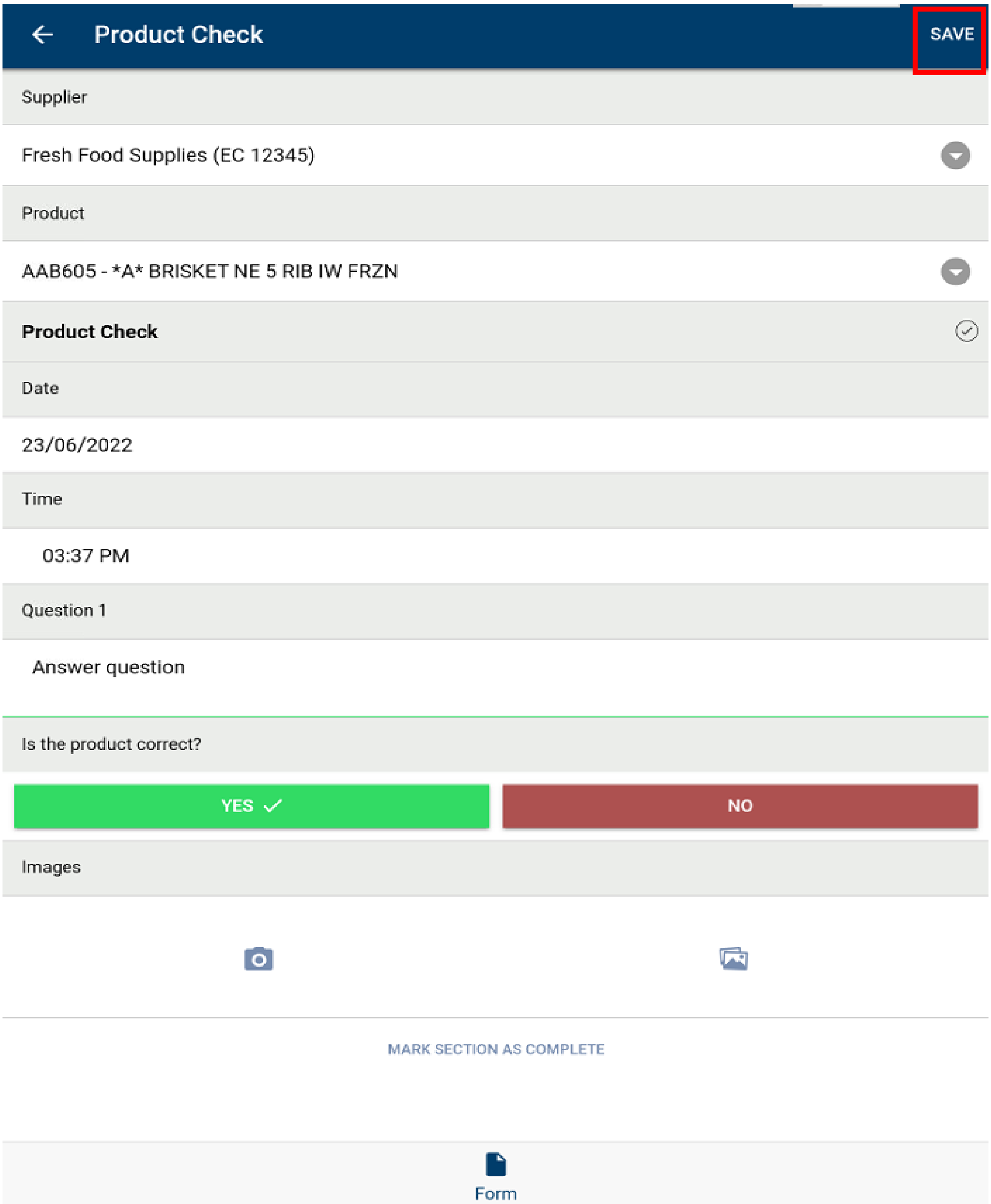
Step 10: If there is no templates select the cloud download icon.



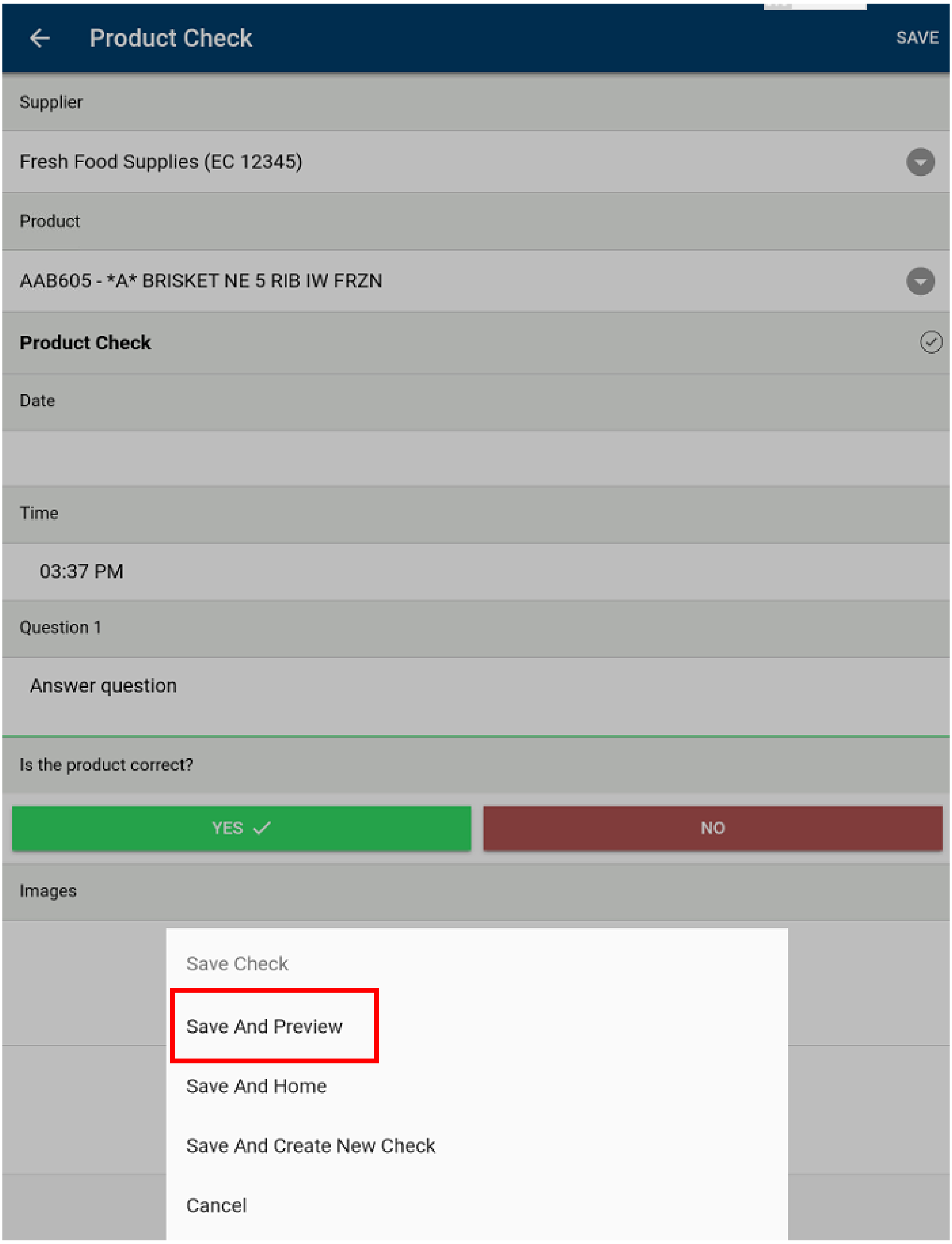
Step 11: The templates now download. Select your template/Check



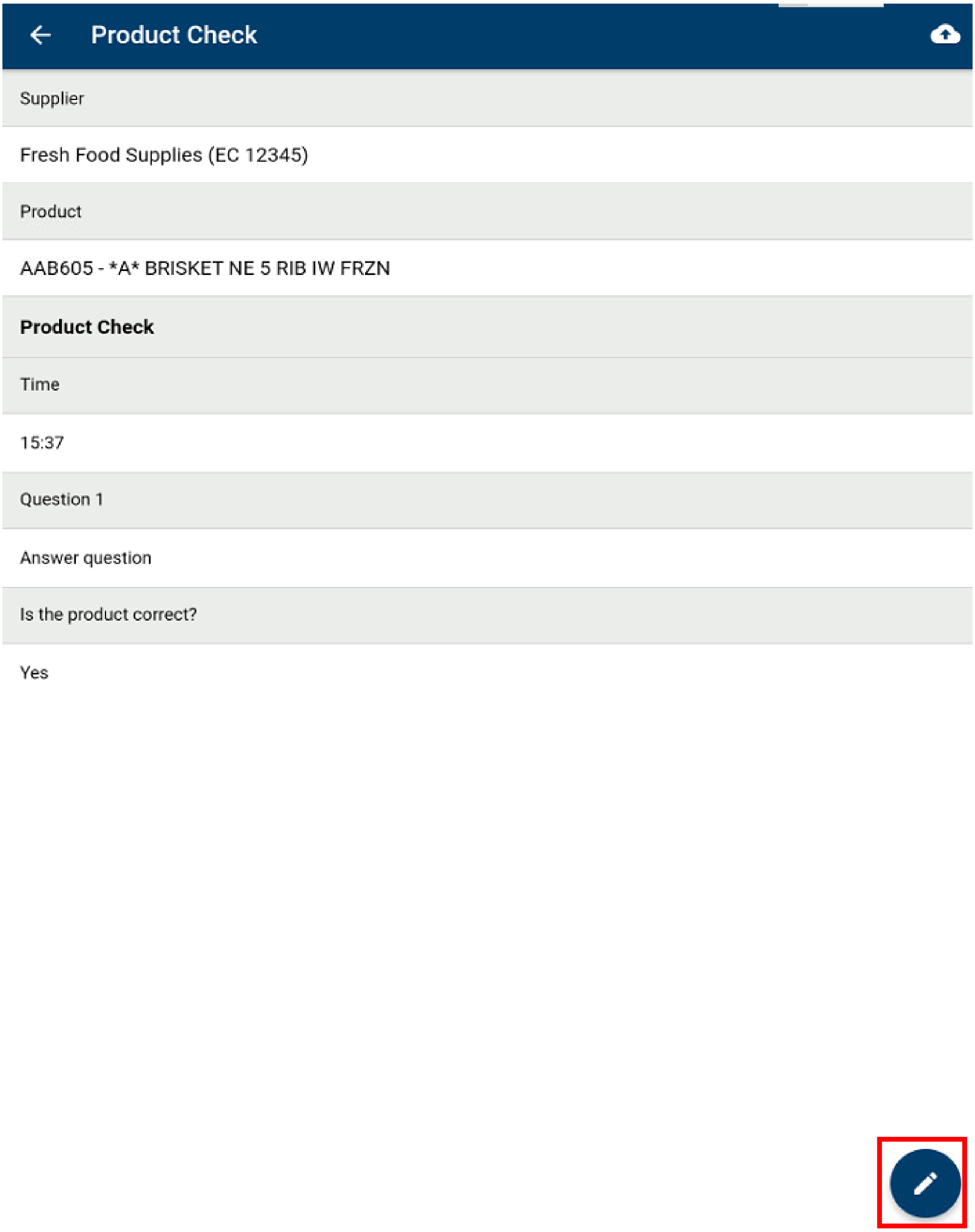
Step 12: Now perform your check by selecting the **Supplier** or **Product** if these are part of your check & any other fields. Select **Save** when done



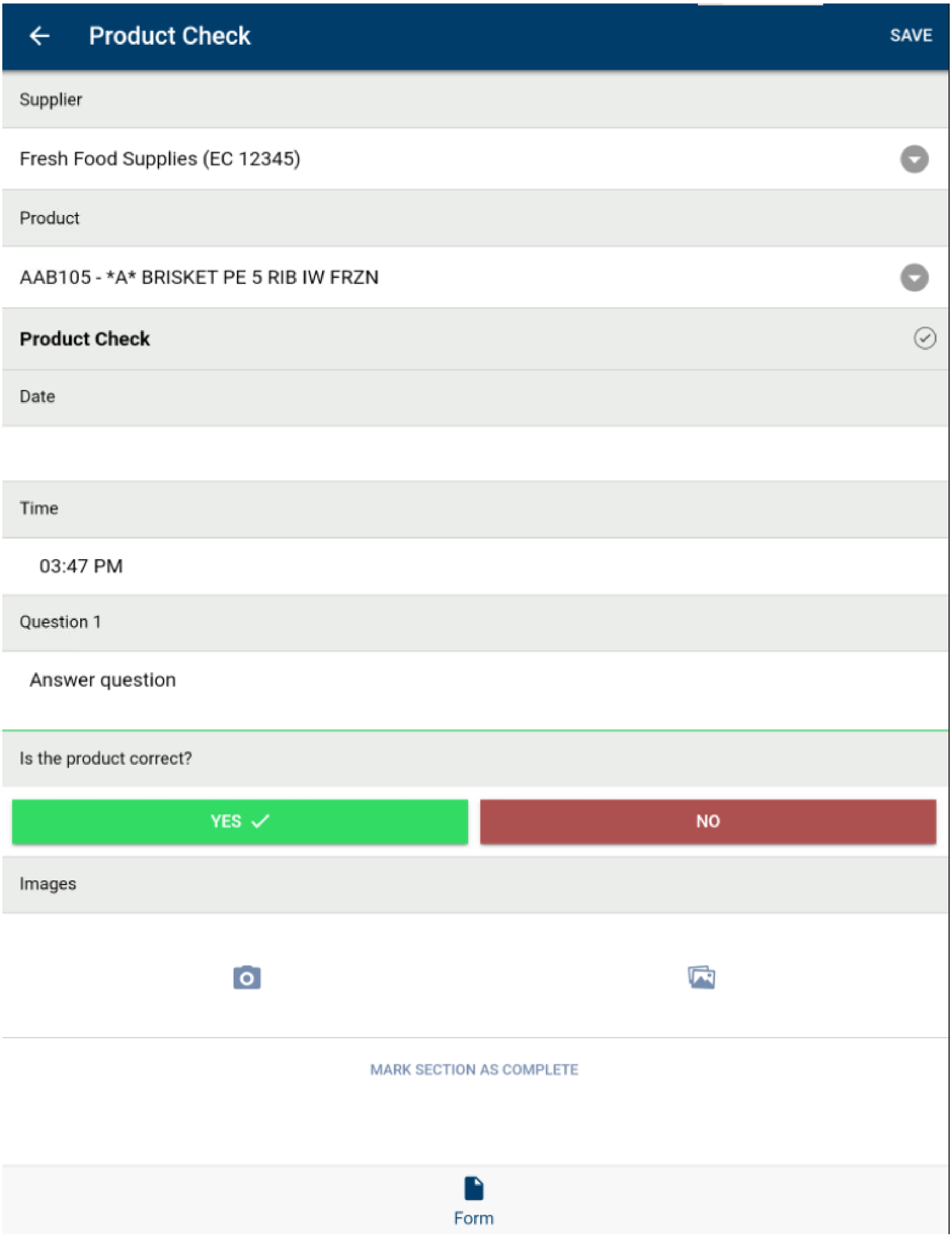
Step 14: Now select **Save & Preview.** If when you complete a check and hit **Save & Home** or **Save & Create New Check** on your check you just did, it ends up in the Drafts tab. Where you need to upload. See Step 19 after viewing next steps.



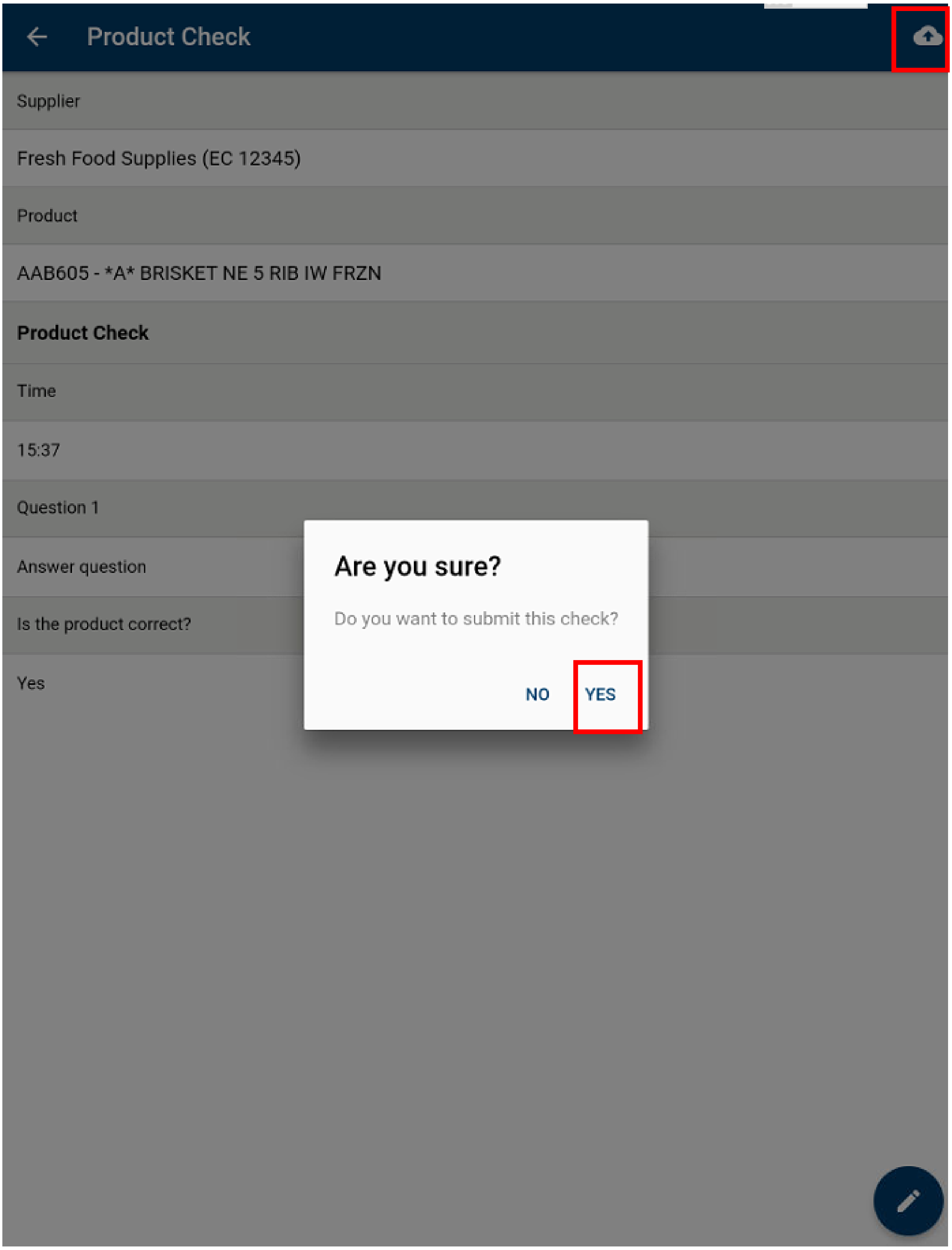
Step 15: If you selected Save & Preview above. This allows you to view the info you have added or **Edit** by selecting the Edit button.



Step 16: Edit or amend your details**.** Select **Save** when done

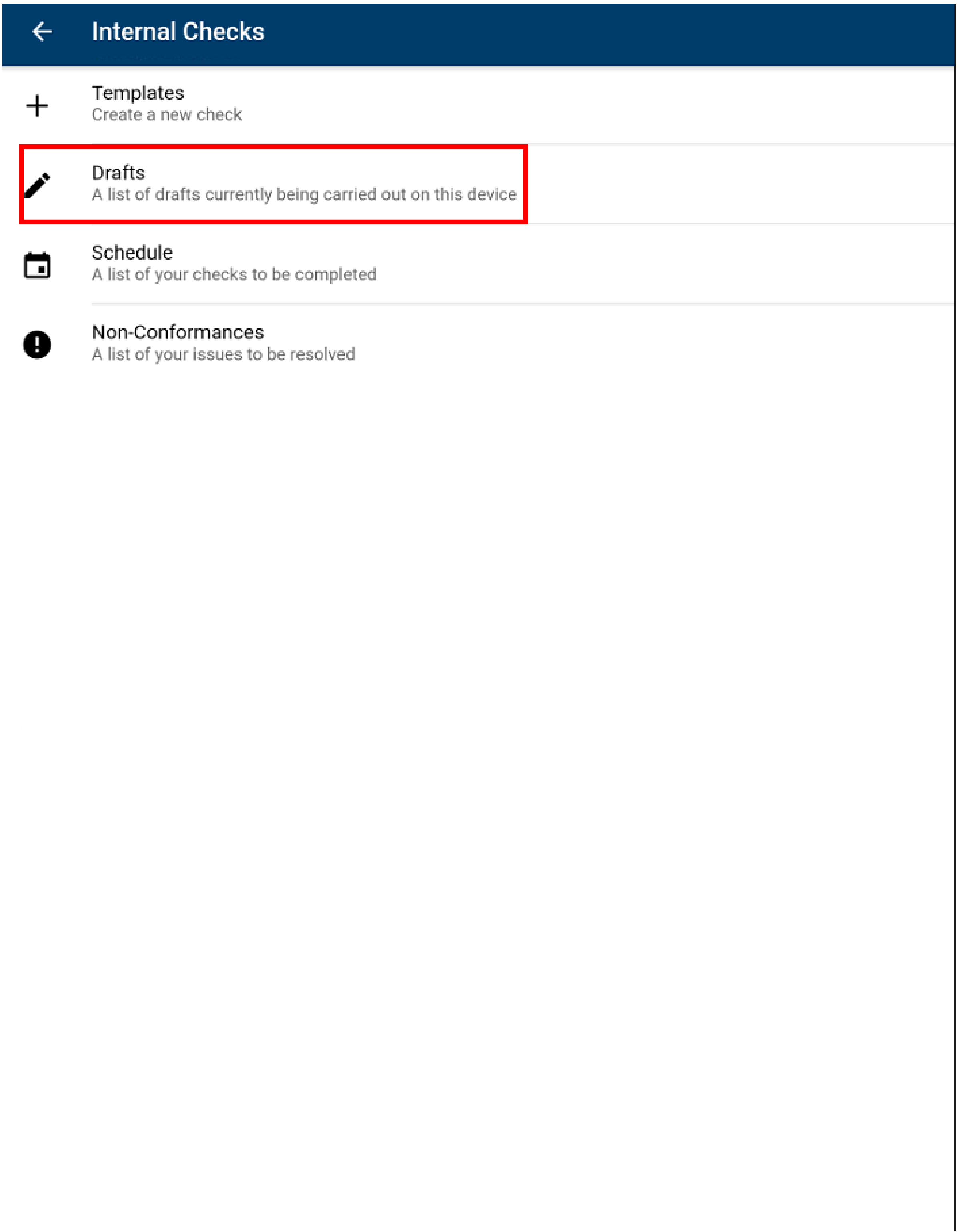


Step 16: Once done select the **Cloud** upload icon. Then Select **Yes**.

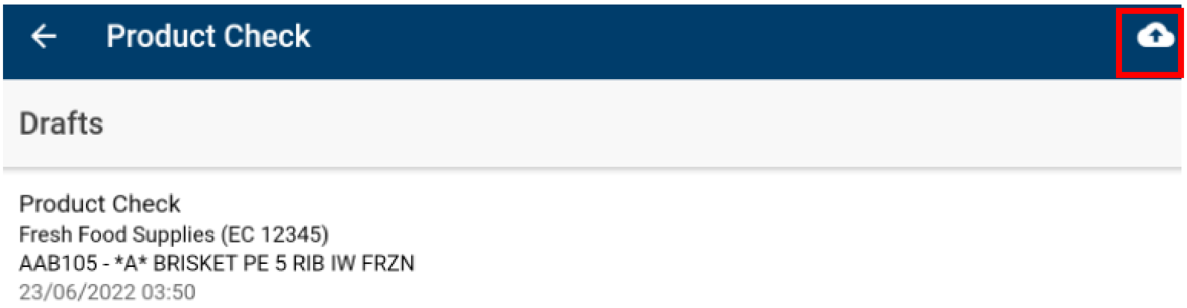


Step 17: Your check is now complete & uploaded to the desktop

Step 19: Select **Drafts**

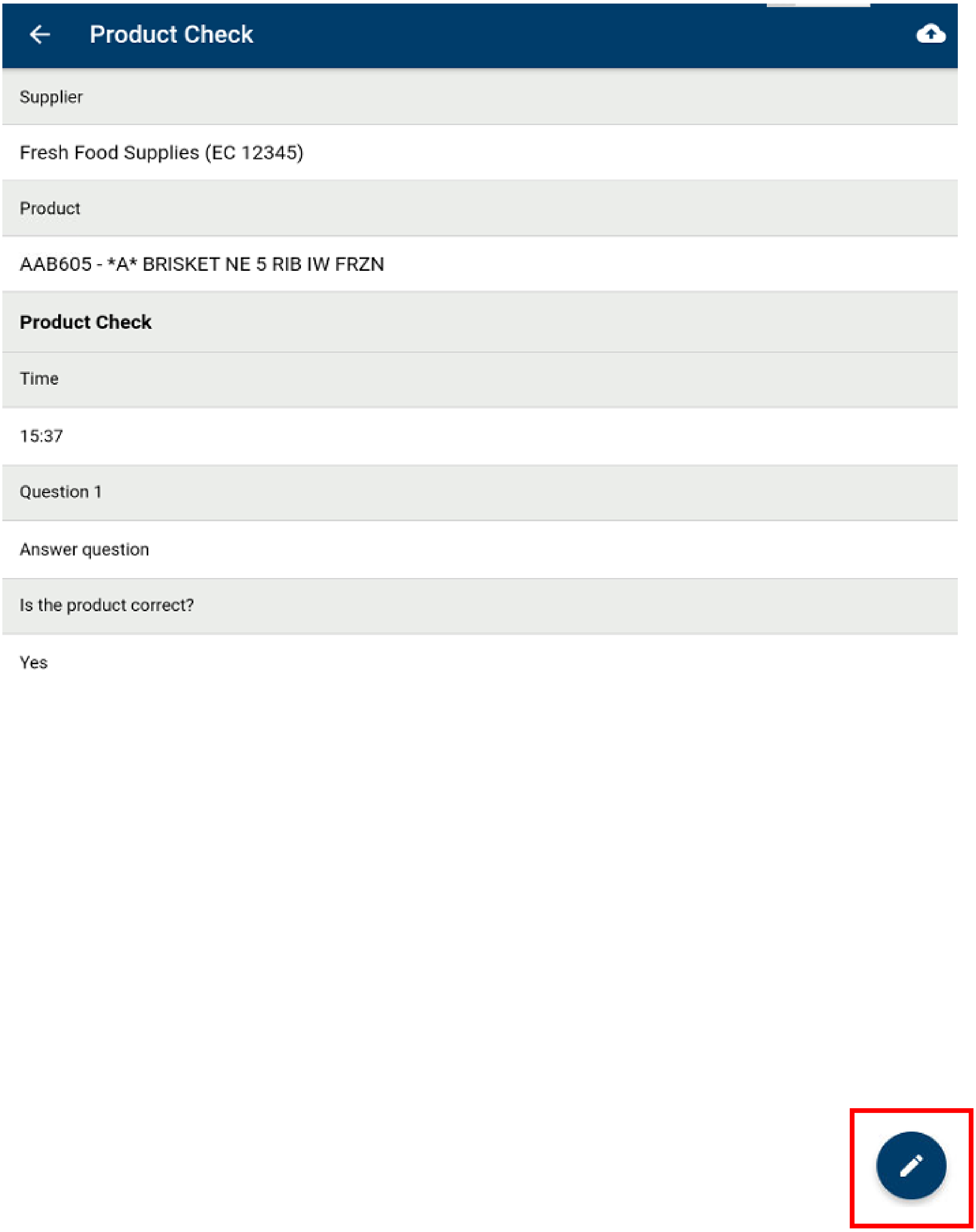


Step 20: If you know your draft check(s) are fully complete and don't need reviewed you can upload all checks in this drafts folder by selecting the **Upload** cloud icon.

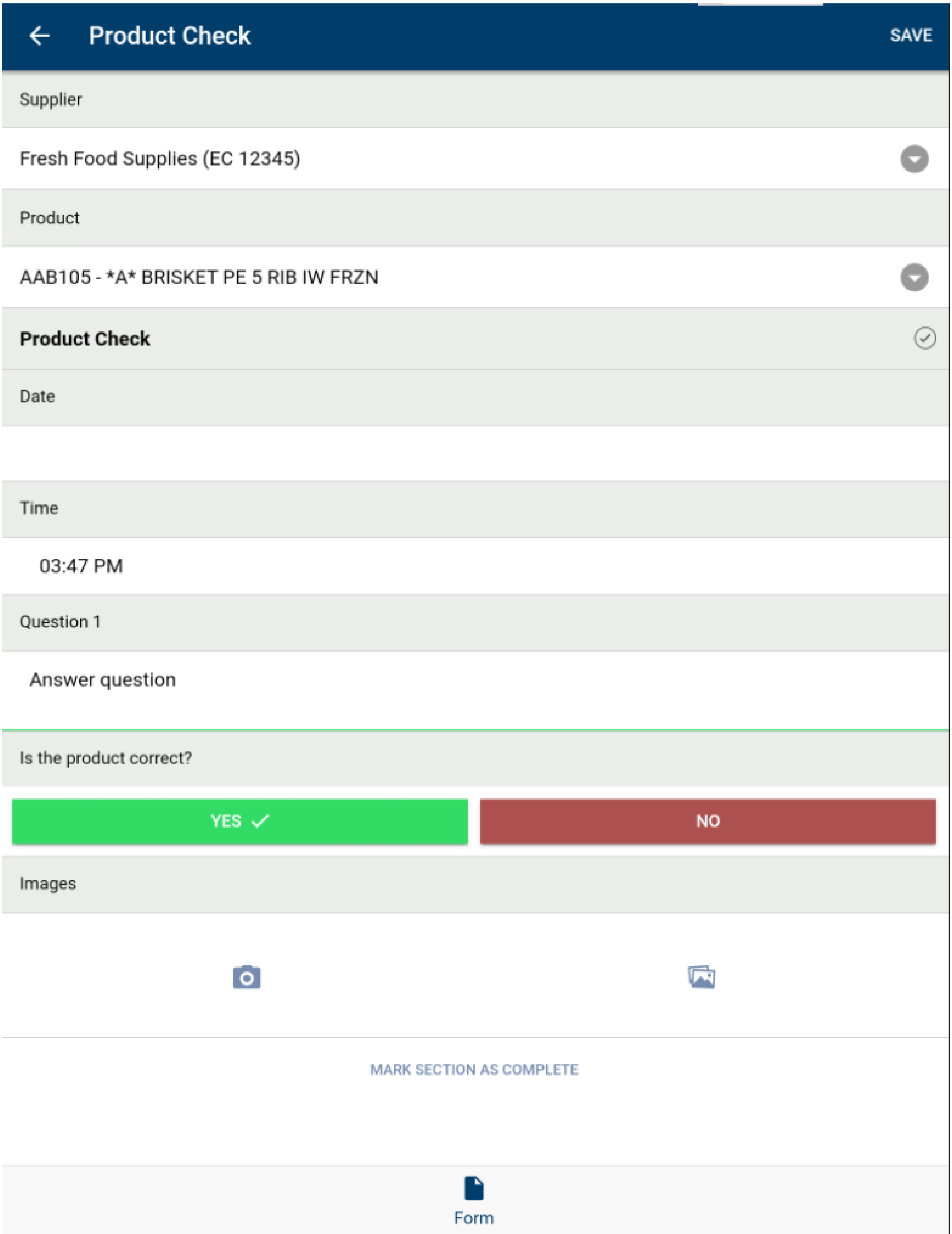


Step 21: Or if you need to review or edit one of these checks you can select it.

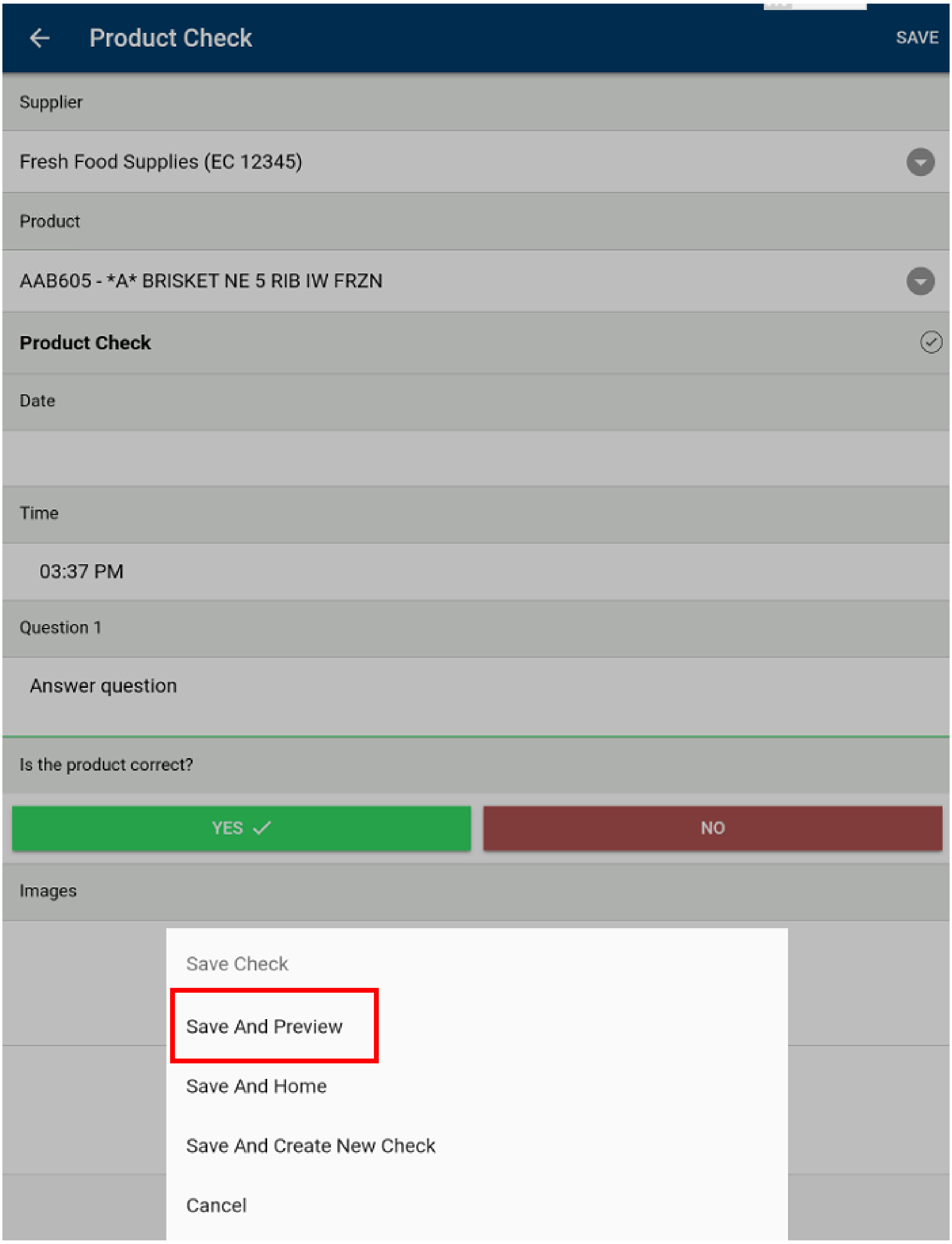
Step 22: Now you are back to where you can select **Edit.**



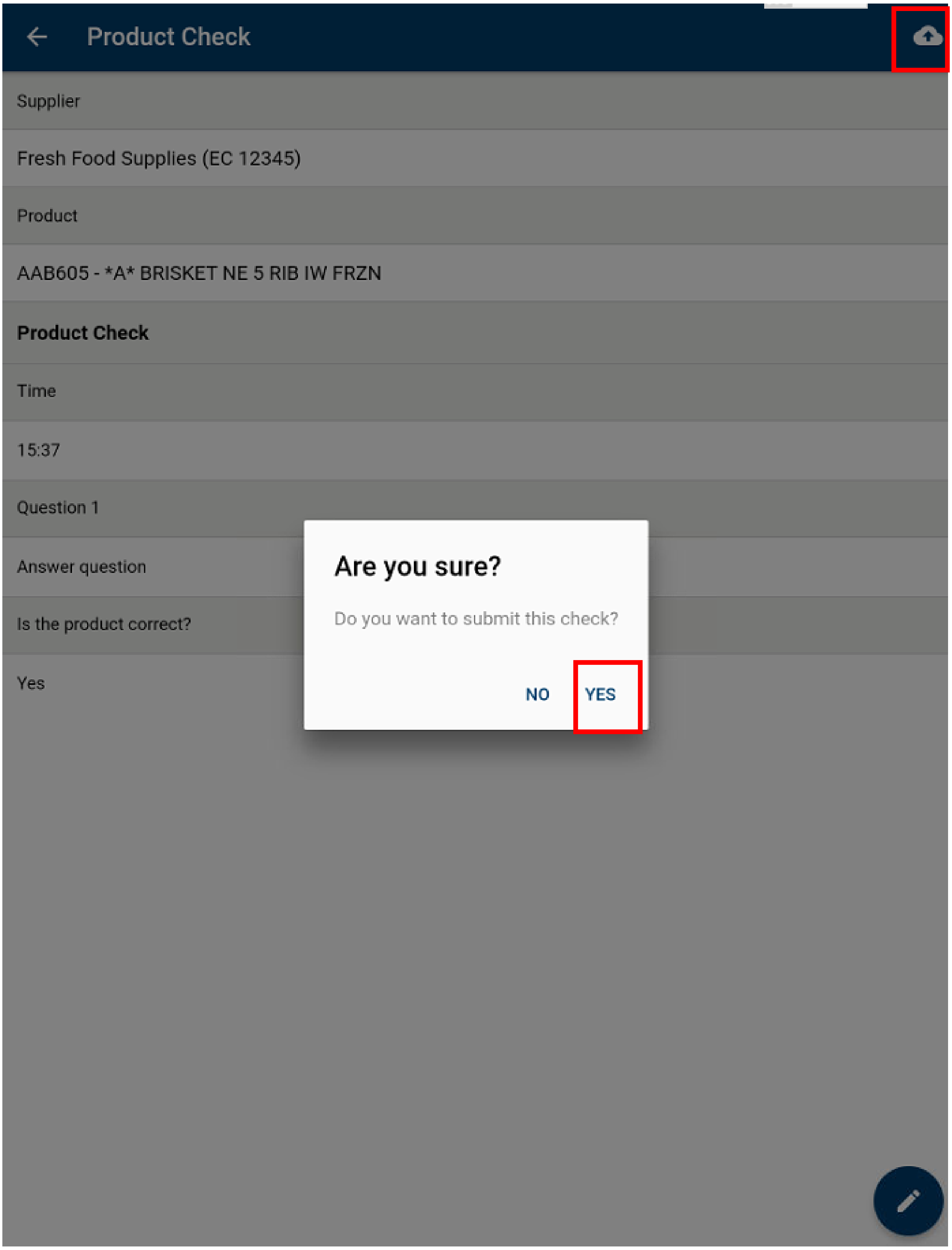
Step 23: Now Edit or Amend your check



Step 24: Once done, select **Save** then **Save & Preview**



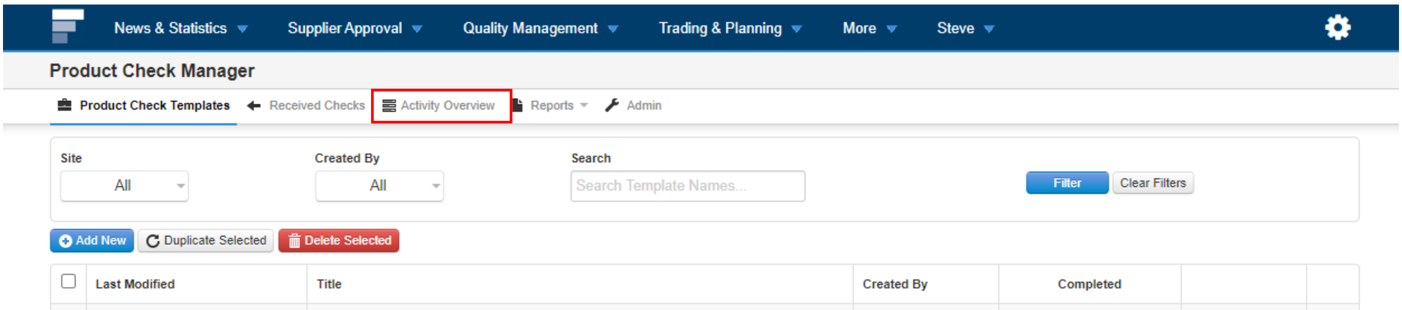
Step 25: Once your check is finally ready & complete. Select the **Cloud** upload icon. Then Select **Yes**.



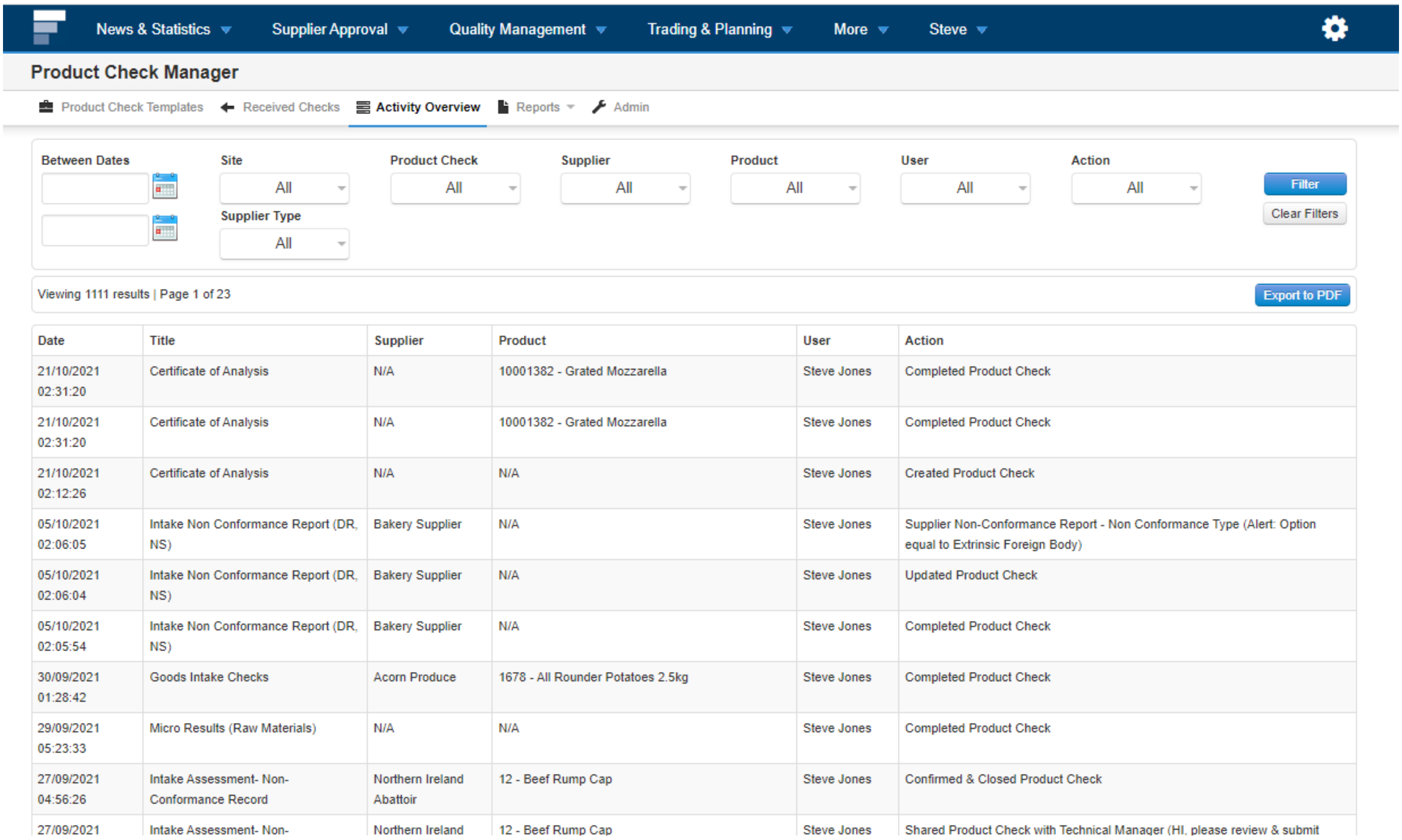
Step 28: Your check is now complete & uploaded to the desktop

5. HOW TO ACCESS THE ACTIVITY OVERVIEW FOR PRODUCT CHECK MANAGER

Step 1: In the Product Check Manager tool, select ***Activity Overview***

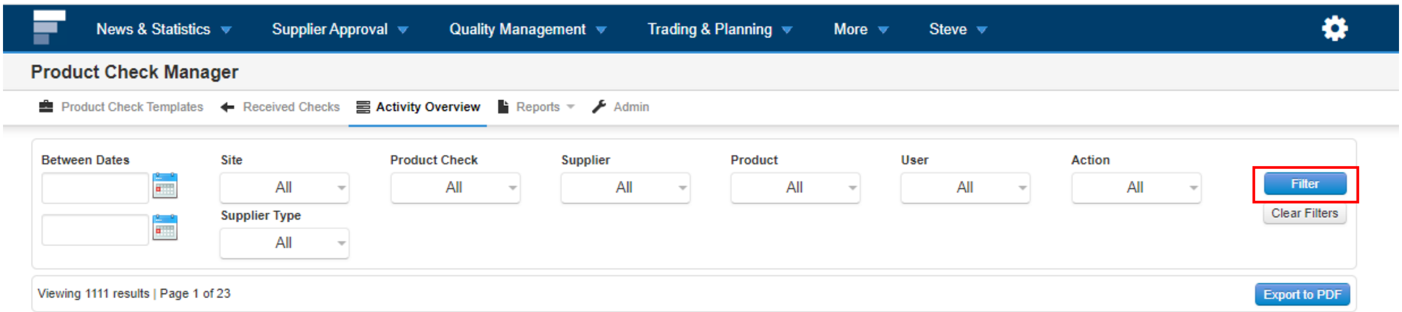


Step 2: Your activity view will show like this below. Bulk closing checks will create a separate log in the activity overview for every check that was closed and the user who “bulk-closed” the records specified.

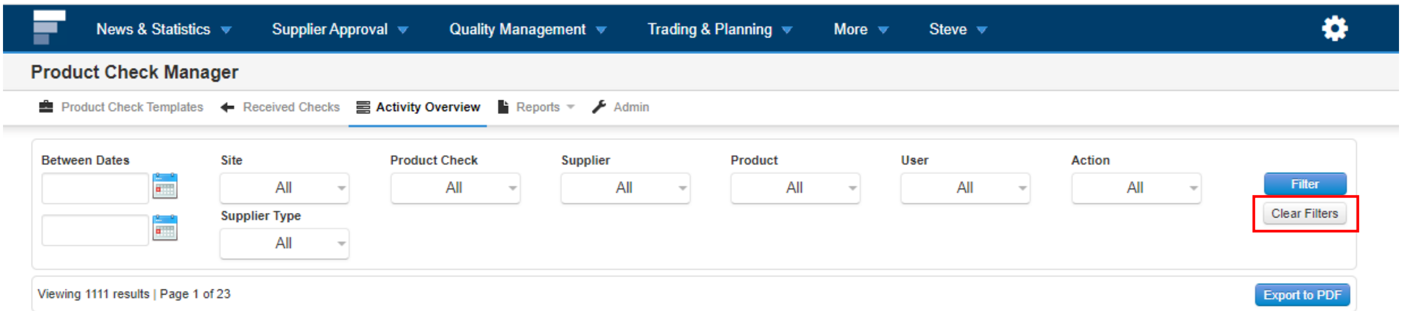


5.1 HOW TO SEARCH FOR SPECIFIC ACTIVITY

Step 1: To search for specific activity use the filters at the top of the page. The drop downs will have options for you to use to filter. Select the ***dates***, ***users*** & ***actions.*** Once done select ***Filter***



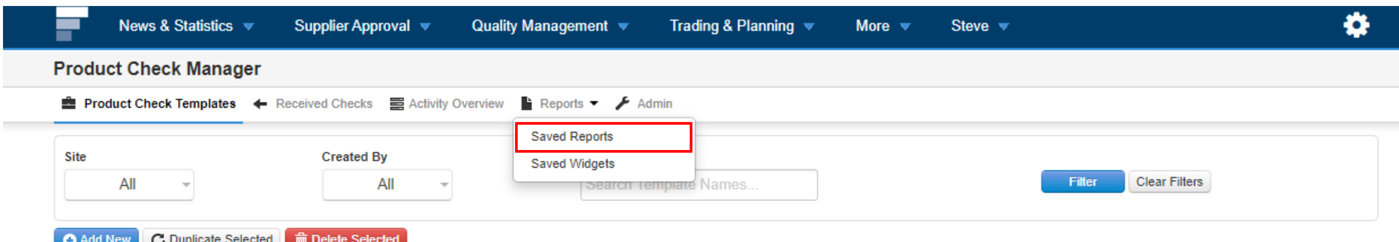
Step 2: ***Clear filters*** when done to reset the activity back to normal view.



6. REPORTING

6.1 HOW TO ANALYSE RECORDED PRODUCT CHECKS

Step 1: In the Product Check Manager, select the Product Check, template that you want to analyse, then select ***Saved Reports***

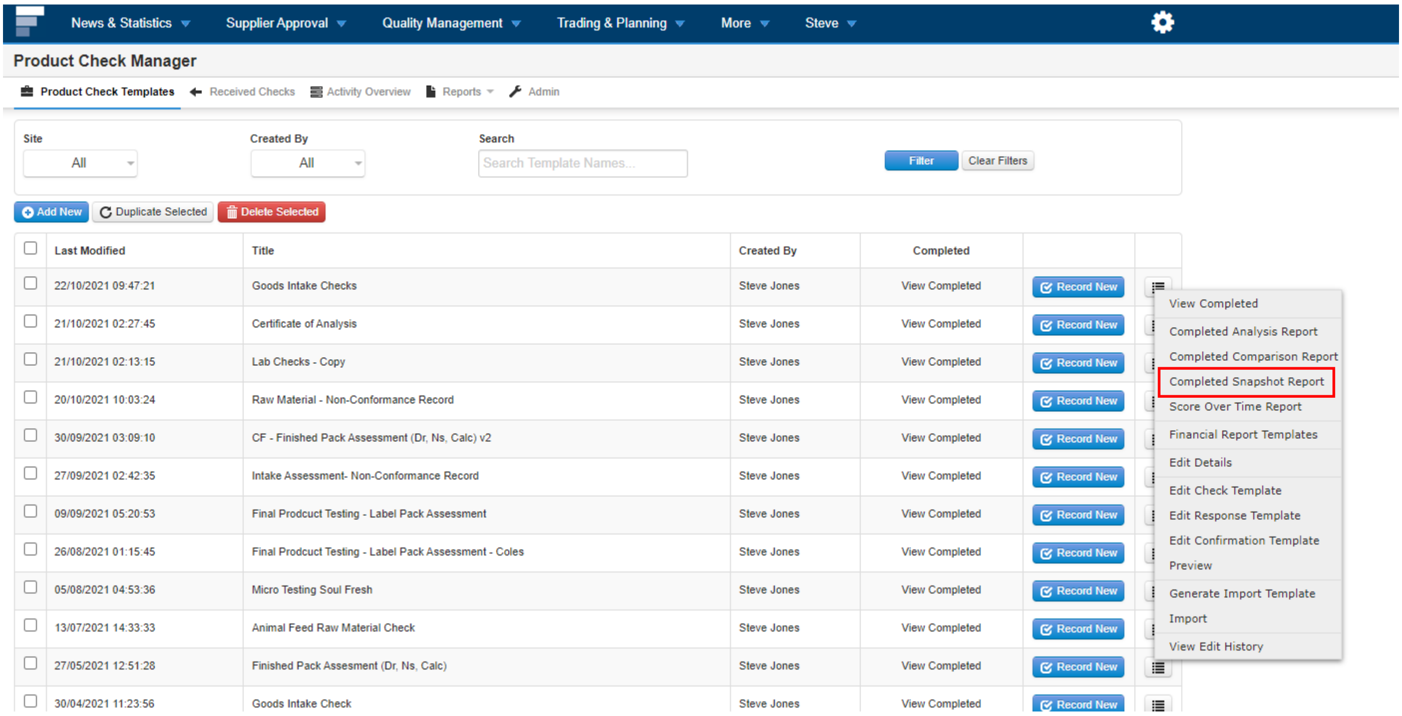


Step 2: Choose the date range, the fields that you want to analyse & what type of chart.

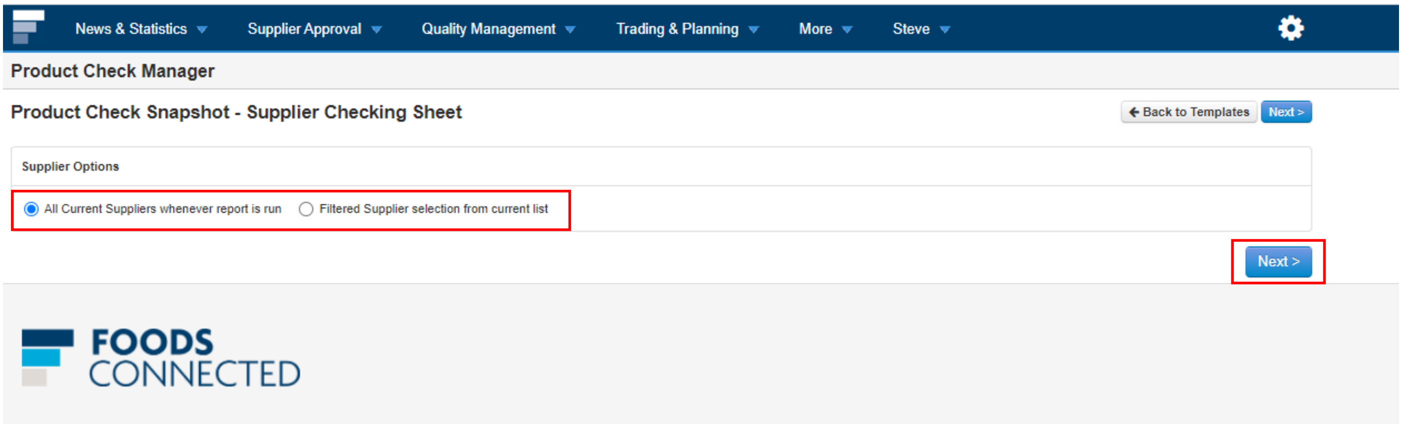
Step 3: Select ***Generate Report*** when done.

6.2 HOW TO CREATE A COMPLETED SNAPSHOT REPORT ON PRODUCT CHECKS

Step 1: Select the Product Check Manager template you want to do a report on, then select ***Completed Snapshot Report***

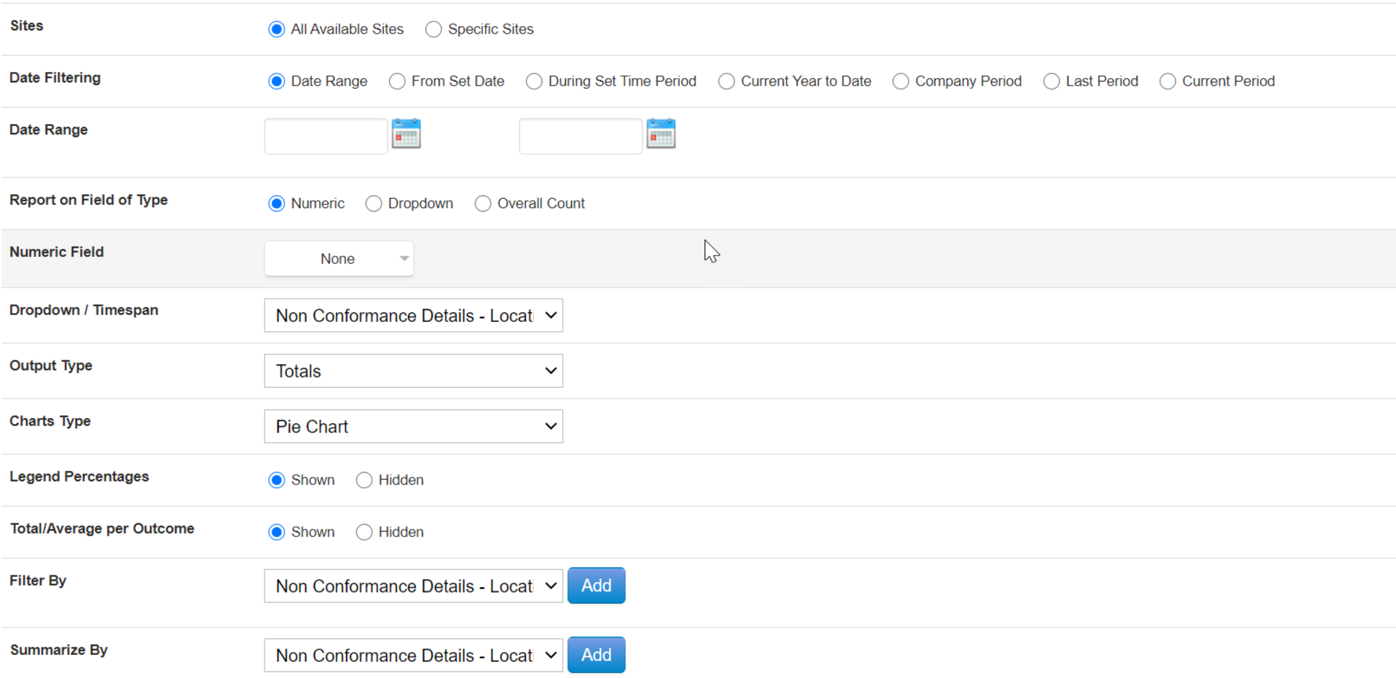


Step 2: Select all current suppliers for the report



Or filter your suppliers & choose. The select ***Next*** when done

Step 3: Now choose the parameters of your report. As you can see there are many to use to create a custom report. Once done select ***Next***

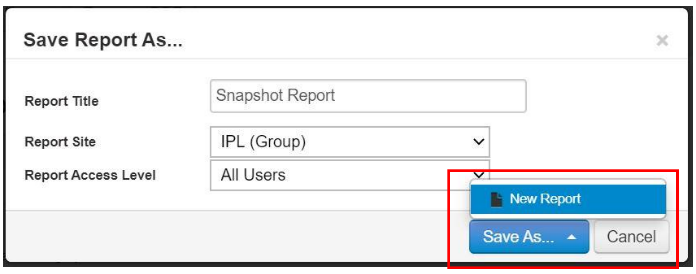


Step 4: If you have chosen to filter your report this option will show below, choose which you would like to filter by the select ***Generate Report***

Step 5: Your report will show like this below, you can amend several parameters of the report by selecting ***Amend Parameters.***

Step 6: To save the report in the Product manager select ***Save Report***

Step 7: Name the report, select the site & the access level. Once done select ***Save As,*** then ***New Report***

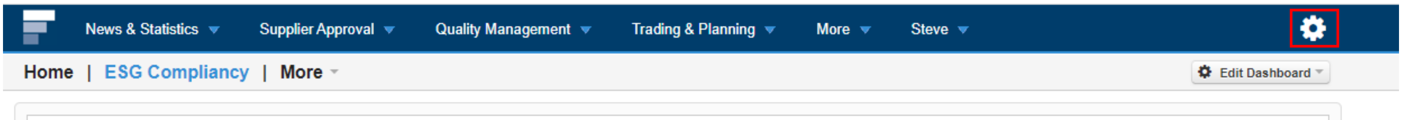


7. USER ACCESS

User access is granted by the admin of the system. So if you need access please request it. If you are an admin you can grant access to other users. You do this in the settings page. This is how you do it below.

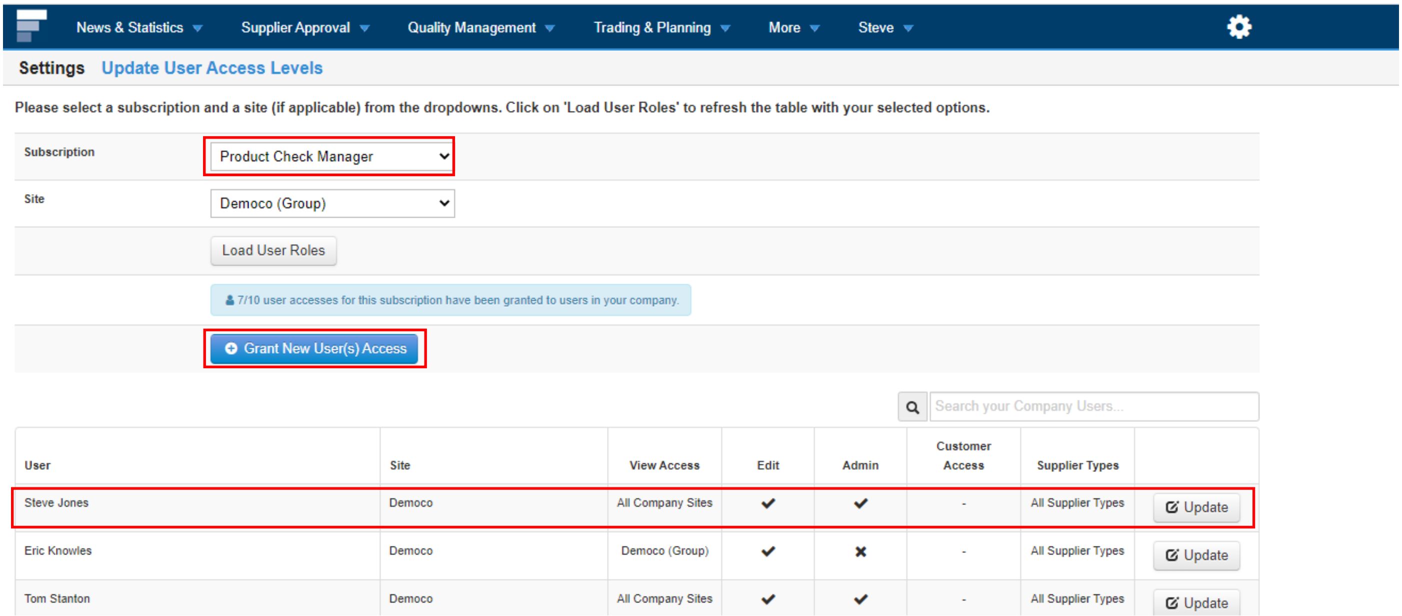
7.1 GRANT A NEW USER ACCESS

Step 1: Select the ***Settings*** Icon



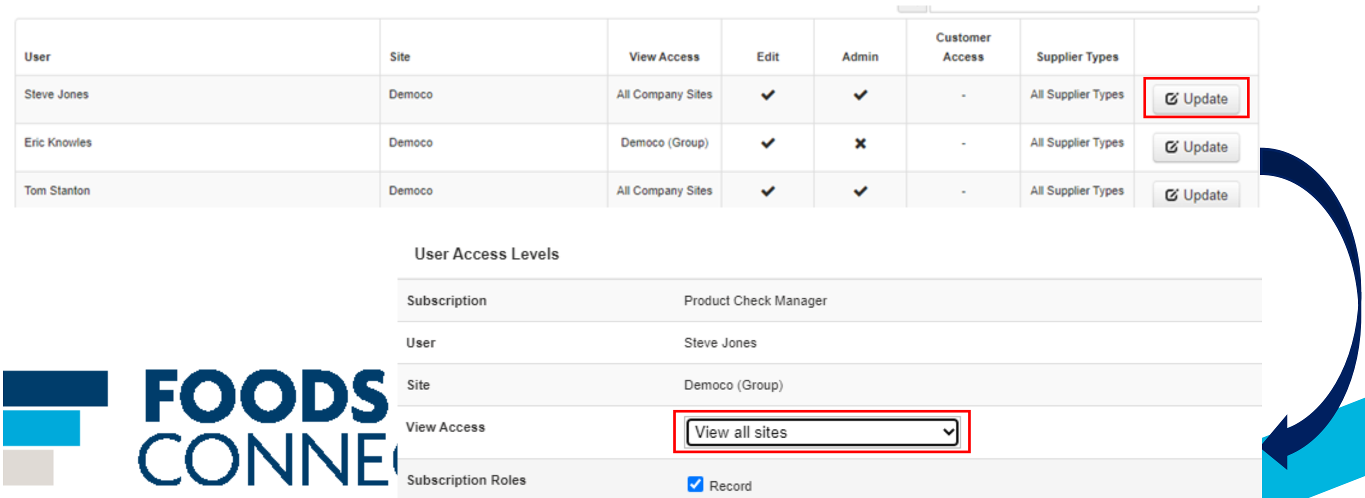
Step 2: Scroll down to Company Users, Email & Security. Select ***User Access – By tool***

Step 3: Select the tool, then the site the person relates too. The select ***Grant New User Access***



7.1.1 GRANT VIEW ACCESS

Step 1: Select user, then click update and set ***View Access*** to View their site only. Select ***Save*** when done

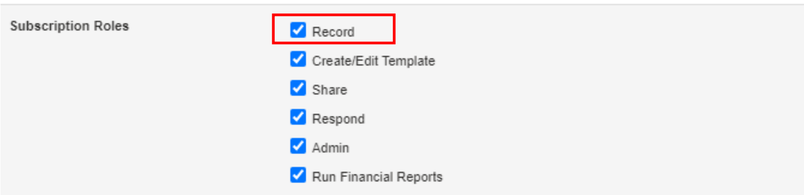


7.1.1.1 VIEW ACCESS PER SITE

Step 1: Select View Specific Sites from the dropdown of View Access. The choose the sites they can view by ticking them. Once done select ***Save***

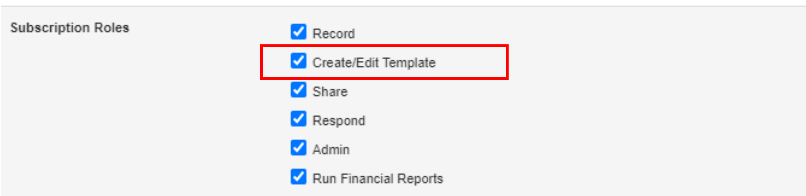
7.1.2 GRANT RECORD ACCESS

Step 1: Select Record for the user. The select **Save** when done



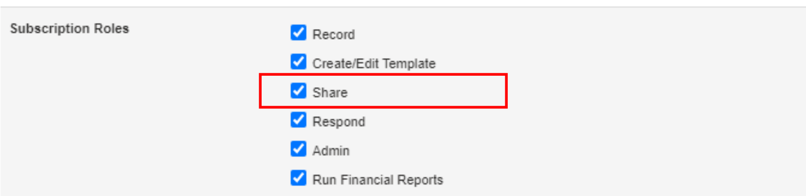
7.1.3 GRANT CREATE/EDIT TEMPLATE ACCESS

Step 1: Select Create/Edit template for the user. The select **Save** when done



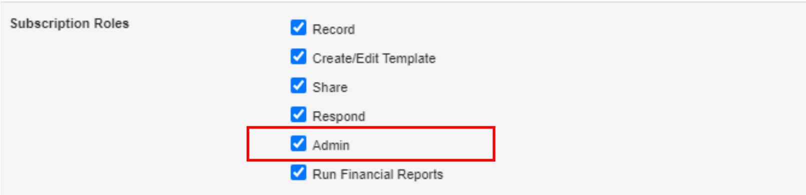
7.1.4 GRANT SHARE ACCESS

Step 1: Select Share for the user. The select **Save** when done



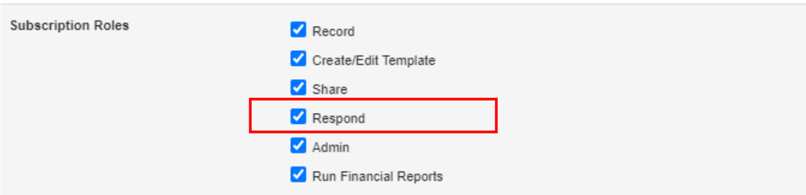
7.1.5 GRANT ADMIN ACCESS

Step 1: Select Admin for the user. The select **Save** when done



7.1.6 GRANT RESPOND ACCESS

Step 1: Select Respond for the user. The select **Save** when done



7.1.7 ACCESS LEVEL

You can restrict or grant the access level further by selecting suppliers that the user can view, respond too etc.

7.1.7.1 GRANTING SUPPLIER TYPES ACCESS

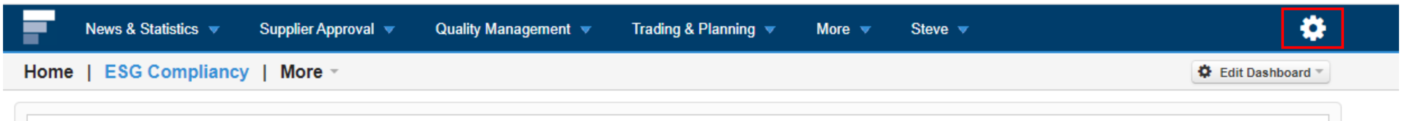
Step 1: Select All Types under ***Supplier types.*** This means this user can view all types of suppliers. Select ***Save*** when done

Step 2: If you want to restrict access, select Selected types only, under ***Selected Types***

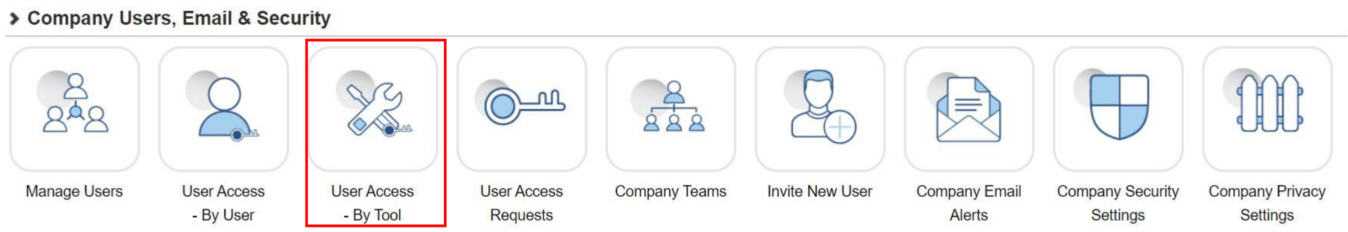
Step 3: The supplier types options opens up for you to select which suppliers they can view. Select suppliers then select ***Save*** when done.

7.2 HOW TO AMEND A USER'S ACCESS

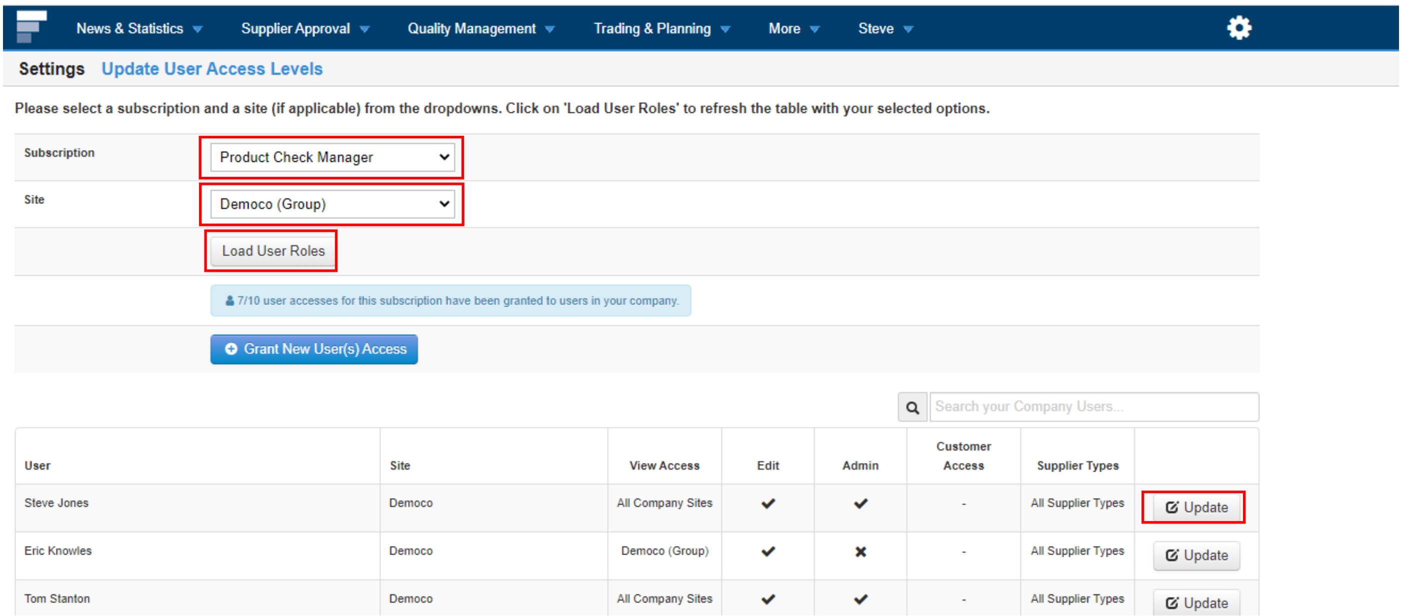
Step 1: Select the ***Settings*** Icon



Step 2: Scroll down to Company Users, Email & Security. Select ***User Access – By tool***



Step 3: Select the tool, then the site the person relates too. Then select ***Load User Roles***

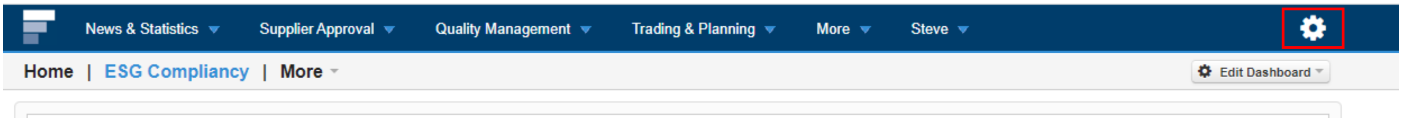


Step 4: Then select ***Update*** beside the chosen user (as shown above)

Step 5: Change ***Subscription Roles*** to the new requirements (as seen in section 6.0), then select ***Save*** *when done*

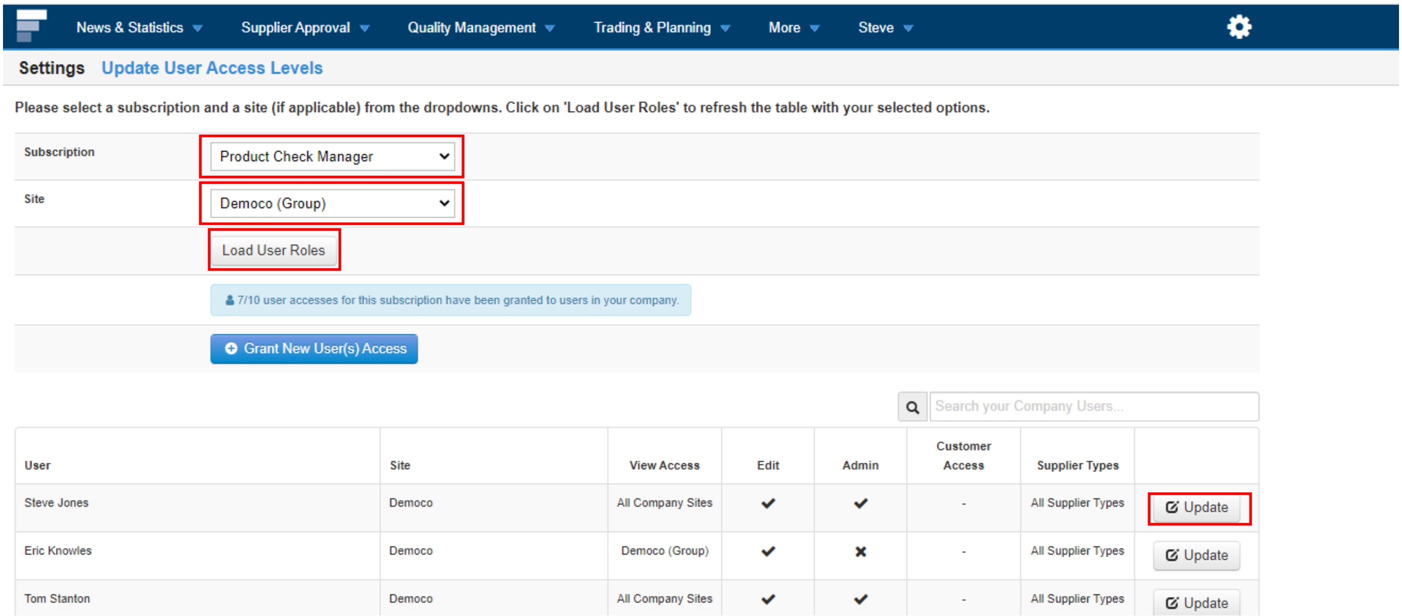
7.3 HOW REMOVE A USER'S ACCESS

Step 1: Select the ***Settings*** Icon



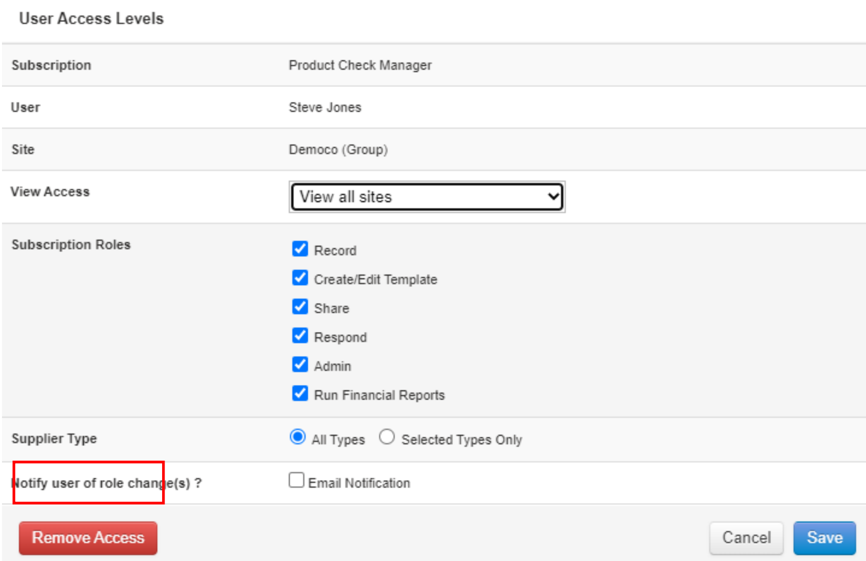
Step 2: Scroll down to Company Users, Email & Security. Select ***User Access – By tool***

Step 3: Select the tool, then the site the person relates too. Then select ***Load User Roles***



Step 4: Then select ***Update*** beside the user (as shown above)

Step 5: Select ***Remove Access***



Step 6: The user is now removed