

# TOOL USER GUIDE

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## VISITING & AUDIT SCHEDULE



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## 1. VISITING & AUDIT SCHEDULE

### 1.1 ACCESSING VISITING & AUDIT SCHEDULE

**Step 1:** Sign in and go to the *Visiting & Audit Schedule* under Supplier Approval

The screenshot shows the top navigation bar of the Foods Connected application. The 'Supplier Approval' menu is expanded, showing a list of options. 'Visiting & Audit Schedule' is highlighted with a red box and a mouse cursor. Other visible options include 'Supplier Manager', 'Supplier Questionnaires', 'Supplier Audit Manager', 'Supplier Check Manager', 'Traceability Manager', 'Product Intake Manager', 'Supplier Document Manager', 'Risk Assessment Manager', 'Incident Manager', 'Remote Audit Manager', and 'Supply Chain Manager'. The 'My Tasks' section on the right shows 133 outstanding tasks.

The user will have a view of the scheduled visits and audits that are due to be carried out on suppliers to their company (this view of audits/visits can be filtered using the fields at the top of the screen).

The screenshot shows the 'Visiting & Schedule Manager' interface. At the top, there are filter fields for Date (From/To), Site, Supplier, Auditor, Visit Type, Status, Date (To), Supplier Type, Supplier Sub Type, Supplier Associated Site, Supplied Via, Country, and Associated Site Status. Below the filters, there are buttons for 'Add New Event', 'Delete Selected', 'Share Selected', and 'Export to Excel'. The main table displays a list of scheduled audits and visits, including columns for Date, Site, Auditor, Supplier, Supplied Via, User Notified, Type, and Status. The table is filtered to show 'Accepted' status items.

Date	Site	Auditor	Supplier	Supplied Via	User Notified	Type	Status
<b>September 2020</b>							
09/09/2020 Week 37	Group	Steve Jones	Acorn Produce			Audit Abattoir & Boning Room Audit Cold Storage	Accepted
<b>January 2020</b>							
28/01/2020 Week 5	Group	Steve Jones	Meat Supplier			Audit Cold Storage	Accepted
<b>December 2019</b>							
20/12/2019 Week 51	Group	Steve Jones	Ingredients supplier		Elaine Rogers	Audit Supplier Visit Audit	Accepted

#### 1.1.1 EXPORTING SCHEDULE TO EXCEL

**Step 1:** From the 'Scheduled Audits' view select the *Export to Excel* button. If you have applied any filters to the page, this will also apply to your export.

**Visiting & Schedule Manager**

☒ Scheduled
 ☐ Received
 ☐ Recommended
 ☐ Calendar
 ☐ Admin

Date (From)  Site  Supplier  Audit Type  Auditor  Visit Type  Status

Date (To)  Supplier Type  Supplier Sub Type  Supplier Associated Site  Supplied Via  Country  Associated Site Status

Date	Site	Auditor	Supplier	Supplied Via	User Notified	Type	Status
February 2021							
<input type="checkbox"/> 08/02/2021 Week 6	Group	Steve Jones	Cold Store		User 1 Cold stores	Audit Abattoir & Boning Room Audit	Accepted

The view of this export will be similar to below, with Audit Date, Auditor, Supplier, Audit Type & Status being captured in the export.

	A	B	C	D	E	F	G
1	Audit Date	Auditor	Supplier	Audit Type	Status		
2	08/02/2021	Steve Jones	Cold Store	Audit Abattoir & Boning Room Audit	Accepted		
3	31/12/2020	Steve Jones	Abattoir 1	Audit Abattoir & Boning Room Audit	Accepted		
4	21/12/2020	Steve Jones	Ava Cheese Supplier	Audit Ingredients Packaging	Awaiting Response		
5	18/12/2020	Steve Jones	Acorn Produce	Audit Generic Meat Audit	In Progress		
6	17/12/2020	Steve Jones	Abattoir 2	Audit Supplier Visit Audit	Declined		
7	10/11/2020	Steve Jones	Abattoir 1	Audit Generic Meat Audit	Accepted		
8	09/09/2020	Steve Jones	Acorn Produce	Audit Abattoir & Boning Room Audit Cold Storage	Accepted		
9	28/01/2020	Steve Jones	Meat Supplier	Audit Cold Storage	Accepted		
10	20/12/2019	Steve Jones	Ingredients supplier	Audit Supplier Visit Audit	Accepted		
11	02/12/2019	Steve Jones	Bakery Supplier	Audit Standard	Accepted		
12	30/09/2019	Steve Jones	Meat Supplier	Audit Abattoir & Boning Room Audit	Accepted		
13	18/09/2019	Steve Jones	Abattoir 1	Audit Cold Storage	Awaiting Response		
14	08/08/2019	Steve Jones	Meat Supplier	Audit Cold Storage	Accepted		
15	08/08/2019	Steve Jones	Bakery Supplier	Audit Cold Storage	Accepted		
16	08/08/2019	Steve Jones	Bakery Supplier	Audit Cold Storage	Accepted		
17	08/08/2019	Steve Jones	Dairy supplier	Audit Cold Storage	Accepted		
18	31/07/2019	Steve Jones	Abattoir 1	Audit Abattoir & Boning Room Audit Farm	Awaiting Response		
19	27/07/2019	Steve Jones	Abattoir 1	Audit Standard	Awaiting Response		
20	17/07/2019	Steve Jones	Abattoir 1	Audit Standard Abattoir & Boning Room Audit	Awaiting Response		
21	15/07/2019	Steve Jones	Bakery Supplier	Audit Standard Abattoir & Boning Room Audit	Accepted		
22	30/06/2019	Steve Jones	Meat Supplier	Audit Standard	Awaiting Response		
23	02/04/2019	Steve Jones	Meat Supplier	Audit Standard	Accepted		
24	27/03/2019	Steve Jones	Meat Supplier	Audit Cold Storage	Awaiting Response		
25	12/03/2019	Sally Mitchell	Bakery Supplier	Audit Cold Storage	Awaiting Response		
26	14/12/2018	Steve Jones	Dairy Farm 1	General Visit	Accepted		
27	30/11/2018	Steve Jones	Bakery Supplier	Audit Standard	Accepted		
28							
29							

## 1.2 VIEWING RECOMMENDED AUDITS

**Step 1:** From Scheduled view select **Recommended**.

**Visiting & Schedule Manager**

☒ Scheduled
 ☐ Received
 ☒ Recommended
 ☐ Calendar
 ☐ Admin

The user will have a view of the suppliers and when their next visits/audits are required. It also captures if an audit is overdue or has already been arranged.

**Visiting & Schedule Manager**

Scheduled ← Received **Recommended** Calendar

Supplier: All, Associated Site: Demo Co (Group), Audit Type: All, Supplier Type: All, Supplier Sub Type: All, Supplied Via: All, Filter, Clear Filters

Country: All, Associated Site Status: All, Audit Score: All

Viewing 3 results | Page 1 of 1

Supplier	Associated Site	Audit Type	Last Audit Date	Supplied Via	Audit Score	Audit Frequency (Months)	Due In (days)	Audit Schedule (Status)
Meat Supplier	Demo Co (Group)	Cold Storage	31/03/2020		12	12	139	Not Scheduled
Cheese supplier	Demo Co (Group)	Cold Storage	31/03/2020	Ingredient Trading Agent	11	12	139	Not Scheduled
Dairy supplier	Demo Co (Group)	Cold Storage			N/A	12	Never Audited	Not Scheduled

Viewing 3 results | Page 1 of 1

## 1.3 ADMIN SETTINGS

### 1.3.1 ADMIN SETTINGS WITHIN SUPPLIER AUDIT MANAGER

**Step 1:** Select **Supplier Audit Manager** under Supplier Approval

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾

Home | Overall Compliance

Latest News

It would require... Significant commitment up the corporate priority horizon, it would require...

Experts weigh in... Gut health is becoming a key area of focus (GBA) is a key area of focus for Culture Technology...

The Beyond Bu... US-based alternative at UK retailer Tesco, following a lengthy delay.

Supplier Approval ▾

- Customer Tools
  - Supplier Manager
  - Supplier Questionnaires
  - Supplier Audit Manager**
  - Supplier Check Manager
  - Traceability Manager
  - Product Intake Manager
  - Supplier Document Manager
  - Risk Assessment Manager
  - Incident Manager
  - Visiting & Audit Schedule
  - Remote Audit Manager
  - Supply Chain Manager
- Supplier Tools
  - Customer Manager
  - Company / Approval Documents
  - Customer Required Documents
  - Linked Customers
  - Customer Activity Overview

Next »

**My Tasks** 112 outstanding

- User 1 Abattoir 3 responded to a supplier check
- User 1 Abattoir 3 responded to a supplier check
- User 1 Abattoir 3 responded to a supplier check
- User 1 Abattoir 3 signed off a document (comment requires review)
- User 1 Abattoir 3 responded to a supplier check

View All Tasks

**Step 2:** From Company Audits screen select **Admin**.

**Supplier Audit Manager**

Company Audits Audit Items Received Customer Audits Activity Overview Reports ▾ **Admin**

**Step 3:** Select **Schedules** from the left-hand menu

**Supplier Audit Manager**

Company Audits Audit Items Received Customer Audits Activity Overview Reports Admin

**Terminology** Set up the terminology to apply when creating and viewing your audit items.

Visible Columns

Outcomes & Scoring

Audit Types

Custom Dropdowns

**Schedules**

Export To PDF

Internal Review

Additional Settings

**Default Setting**

Audit Item Location e.g. Boning Hall/Documentation etc

Audit Item Types e.g. Dark Meat/Packaging etc

Audit Item Category e.g. Major/Minor etc

**Preferred Term**

Location

Type

Category

Save Settings

From the screen below the user is able to create default text and an attachment to be used whenever requesting an audit of a supplier, e.g. having an agenda automatically attached to the request.

**Supplier Audit Manager**

Company Audits Audit Items Received Customer Audits Activity Overview Reports Admin

**Terminology** Manage your company defaults for supplier audit schedules.

Visible Columns

Outcomes & Scoring

Audit Types

Custom Dropdowns

**Schedules**

Export To PDF

Internal Review

Additional Settings

**Default Overview**

In the event of there being a critical failure, i.e. a failure to comply with a food safety or legal issue, then the site will not be approved for use by Demo Co.

**Auto Enable Create Audit** Yes

**Default Attachment** Choose File No file chosen

Save Settings

**Step 4:** Once all details are set select **Save Settings** button.

### 1.3.2 ADMIN SETTINGS WITHIN VISITING & AUDIT SCHEDULE

**Step 1:** From Scheduled Visit Audits screen select **Admin**.

**Visiting & Schedule Manager**

Scheduled Received Recommended Calendar Admin

**Step 2:** Select the **Add Internal Approvals** button

**Visiting & Schedule Manager**

Scheduled Received Recommended Calendar Admin

**Approvals** This is where you can set up users to approve any visits by site and audit types before being sent.

Custom Fields

**Add Internal Approvals**

Site	Audit Type	Approval Required By	Visit Approvers
There are currently no Visit and Audit Schedule approvers set up for your company...			

**Step 3:** Complete the fields shown below to capture the approvers required prior to an audit being scheduled and then select **Save**

Select the site that the approver is for

Select the Audit Type that the approval is required for

Select if all users have to approve or one approver only

Select the users required to approve the audit/visit

**Step 4:** If required **Custom Fields** can be added, these will then be visible for completion in the new visit/audit request. Select the **Add New Field** button

**Step 5:** Select the required field type, complete the **Display Name** and mark this as **Active**. Select the **Add Field** button

Select the field type required from the dropdown (Text Box/Dropdown/Check Box List)

Complete the field name required


Mark the Check box to make the field 'Active'

**Step 6:** The added custom fields can be viewed in the Admin section. For both *Dropdown & Check Box List* fields additional steps are required to build the options required, if a *Text Box* was selected the set up is complete. Select the button to the right side of the *Field Type* record

If changes to the **Active** status are made, ensure to select the **Save Settings** button.

You can add custom fields to allow you to find audits easily.

[Add New Field](#)

Field Type	Display Name	Active
Test Custom Field	Dropdown	<input checked="" type="checkbox"/> 

[Save Settings](#)

### Step 7: Select **Add New Categories** tab

Category Manager

Current Categories

Add New Categories

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

Delete Selected

Category Name

Order

Cancel

Add/Update Categories

### Step 8: Complete the **Category Name** fields as required then select **Add/Update Categories** button

Category Manager

Current Categories

Add New Categories

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

Category Name

Category Name

Category Name

Category Name

Category Name

Category Name

Category Name

Category Name

Category Name

Cancel

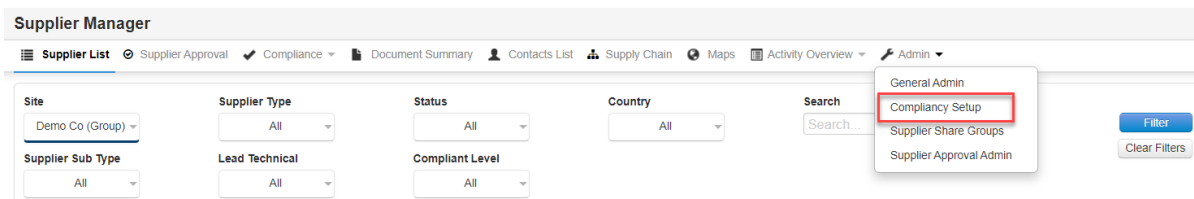
Add/Update Categories



### 1.3.3 SETTING UP A RECOMMENDED AUDIT FREQUENCY

This function will create the list within the Recommended view for the Visit & Audit Schedule tool and determine when the next audit would be due. This setting is within the Supplier Manager tool.

**Step 1:** From **Supplier Manager** screen select the **Admin** dropdown, and select **Compliance Setup**



**Step 2:** The view will be of any existing compliance rules that have been created. By selecting the edit button on the right of the list the user will be able to see and amend the settings

[Add Compliance Rule](#) Demo Co (Group) ▼

Site	Supplier Type	Suppliers		Approval Process	
Group	Services	2 Suppliers	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires	<input checked="" type="checkbox"/>	
Group Agent	Agent / Broker	All Suppliers	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Requests	<input checked="" type="checkbox"/>	
Group Butter Supply	Dairy	All Suppliers	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires <input checked="" type="checkbox"/> Risk Assessments	<input checked="" type="checkbox"/>	
Group Bakery	Bakery	1 Suppliers	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires <input checked="" type="checkbox"/> Shared Specifications	<input checked="" type="checkbox"/>	
Group	Dairy	2 Suppliers	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires <input checked="" type="checkbox"/> Supplier Audits	<input checked="" type="checkbox"/>	

**Step 3:** The options on the compliance rules allow to add Supplier Audits, when this check-box is selected there is the Audit Types option at the top of the screen. Select **Audit Types** here.

**Supplier Manager**

Supplier List Supplier Approval Compliance Document Summary Contacts List Supply Chain Maps Activity Overview **Admin**

**Details** Select Suppliers Questionnaires **Audit Types** Additional Rules Documents

Site Group

Description

Rule Type ☒ Standard ☐ Approval Process

**Supplier Type**

- ☐ Poultry Farm
- ☐ Meat Processor
- ☐ Primal Processor
- ☐ Meat Retail Packer
- ☐ Internal
- ☐ Customer
- ☐ Finished Foods
- ☐ Transport
- ☐ Abattoirs
- ☐ Distribution centres
- ☐ Cold stores
- ☐ Agent / Broker
- ☐ Services
- ☐ Farm
- ☐ Fruit
- ☐ Seafood
- ☐ Oil
- ☐ Vegetables
- ☐ Salt
- ☐ Meat
- ☐ Ingredients
- ☐ Bakery
- ☒ Dairy
- ☐ Packaging

**Supplier Sub Type**

- ☐ Cheese
- ☐ Milk
- ☐ Whey
- ☐ Powder

**Supplier Status**

- ☒ Approved
- ☒ In Progress
- ☒ Requires Review
- ☒ Delisted

**Company Profile**  
Supplier must confirm that the details in their company profile are correct and up-to-date.

☒ Every  Months

**Document Shares**  
All documents that require sign off must be signed off.

☒

**Document Requests**  
All requested mandatory documents must be uploaded and not past their expiry date.

☒

**Questionnaires**  
All shared supplier questionnaires must be responded to.

☒

**Supplier Audits**  
All shared supplier audits must be responded to.

☒

**Supplier Checks**  
All shared supplier checks must be responded to.

☐

**Specifications**  
All specifications that require sign off must be signed off.

☐

**Traceability Checks**  
All shared traceability checks must be responded to.

☐

**Risk Assessments**  
All Risk Assessments must be responded to.

☐

**Customer Approved Lists**  
Outstanding Customer Approved Lists must be reviewed.

☐

**Step 4:** Mark the checkbox beside the audit required and then type the frequency required for this audit (in months).

**Supplier Manager**

Supplier List Supplier Approval Compliance Document Summary Contacts List Supply Chain Maps Activity Overview **Admin**

Details Select Suppliers Questionnaires **Audit Types** Additional Rules Documents

<input type="checkbox"/>	Abattoir & Boning Room Audit	Every 12 Months
<input checked="" type="checkbox"/>	Cold Storage	Every 12 Months
<input type="checkbox"/>	Farm	Every 12 Months
<input type="checkbox"/>	Generic Meat Audit	Every 12 Months
<input type="checkbox"/>	Ingredients	Every 12 Months
<input type="checkbox"/>	Packaging	Every 12 Months
<input type="checkbox"/>	Supplier Audit 1	Every 12 Months
<input type="checkbox"/>	Supplier Visit Audit	Every 12 Months

Delete Cancel Save

**Step 5:** Select **Save** button.

Note – as supplier compliance rules can be customised for the supplier type this allows the same audit type to have different frequencies for different types of supplier, if required, as shown in the example below.

**Visiting & Schedule Manager**

Scheduled Received **Recommended** Calendar Admin

Supplier: All Associated Site: Demo Co Head Office Audit Type: All Supplier Type: All Supplier Sub Type: All Supplied Via: All Filter Clear Filters

Country: All Associated Site Status: All Audit Score: All

Viewing 3 results | Page 1 of 1 25 50 100 All | << first < previous next > last >>

Supplier	Associated Site	Audit Type	Last Audit Date	Supplied Via	Audit Score	Audit Frequency (Months)	Due In (days)	Audit Schedule (Status)	
Cheese supplier	Demo Co Head Office (Group)	Cold Storage	31/03/2020	Ingredient Trading Agent	11	12	67	Not Scheduled	
Meat Supplier	Demo Co Head Office (Group)	Cold Storage	31/03/2020		12	24	432	Not Scheduled	
Dairy supplier	Demo Co Head Office (Group)	Cold Storage			N/A	12	Never Audited	Not Scheduled	

## 1.4 REQUESTING A VISIT/AUDIT

There are two ways to navigate to the request screen

**Step 1:** From Scheduled Visit/Audits screen select the **Add New Event** button

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾

### Visiting & Schedule Manager

Scheduled ← Received ○ Recommended 📅 Calendar

Date (From)  Site  Supplier  Audit Type  Auditor  Visit Type  Status  [Filter](#)  
 Date (To)  Supplier Type  Supplier Sub Type  Supplier Associated Site  Supplied Via  Country  Associated Site Status  [Clear Filters](#)

Add New Event Delete Selected Share Selected Export to Excel

Or

**Step 1:** From Recommended screen select the + button beside the record/supplier requiring a visit/audit

Visiting & Schedule Manager

Scheduled ← Received ○ Recommended 📅 Calendar

Supplier  Associated Site  Audit Type  Supplier Type  Supplier Sub Type  Supplied Via  [Filter](#)  
 Country  Associated Site Status  Audit Score  [Clear Filters](#)

Viewing 3 results | Page 1 of 1

Supplier	Associated Site	Audit Type	Last Audit Date	Supplied Via	Audit Score	Audit Frequency (Months)	Due In (days)	Audit Schedule (Status)	
Meat Supplier	Demo Co (Group)	Cold Storage	31/03/2020		12	12	138	Not Scheduled	<a href="#">+</a>
Cheese supplier	Demo Co (Group)	Cold Storage	31/03/2020	Ingredient Trading Agent	11	12	138	Not Scheduled	<a href="#">+</a>
Dairy supplier	Demo Co (Group)	Cold Storage			N/A	12	Never Audited	Not Scheduled	<a href="#">+</a>

**Step 2:** Complete the details required as shown on the screen below. Any details previously put in to the Admin settings will be shown here (with the attachments and/or detail in the Audit Overview field). If this request is to be confirmed by the supplier ensure to select to send to a Company User.

Note – here it is possible to add multiple dates for the supplier to select the date that suits them best.

**Visiting & Schedule Manager**

**Scheduled** ← Received → Recommended → Calendar

Site: Demo Co (Group) ▼

Visit Type: Audit ▼

Auditor: Steve Jones ▼

Audit Types

- ☐ Abattoir & Boning Room Audit
- ☐ Abattoir & Boning Room Audit - Copy
- ☐ Cold Storage
- ☐ Farm
- ☐ Generic Meat Audit
- ☐ Ingredients
- ☐ Packaging
- ☐ Supplier Audit 1
- ☐ Supplier Visit Audit
- ☐ Test Audit

Assign Audit Checklists: No ▼

Site/Supplier: Meat Supplier ▼

Send To User: ☒ Do Not Send ☐ Company User ☐ Via ☐ Email Address

Select Proposed Dates:  Add Date

File Attachments: Choose File No file chosen Choose File No file chosen Choose File

Audit Overview: In the event of there being a critical failure, i.e. a failure to comply with a food safety or legal issue, then the

Select the Site that the visit/audit is for

Select the Visit Type (Audit/Supplier Check/General Visit)

Select the Auditor

Select the Audit Type (if this audit type is associated with specific supplier types these will be the only options when selecting the Site/Supplier from dropdown)

Select Yes/No for assigning Audit Checklist (selecting Yes will bring an additional field for completion to select the specific checklists required)

Select if the request is to be shared with a user for the supplier (selecting 'Company User' brings options for the user and to CC any additional users to the request)

Select the required date and select **Add Date**

Add any required attachments

Add any details in the free text field

**Step 3:** Select the **Save** button and select the option from the drop down.

**Save** ▼

- Save
- Save & Share
- Save & Mark Accepted
- Save & Mark Accepted (Create Audits)

If sharing with a supplier, they will receive notification that the request has been made and it will be in their task list (Note – users who received the notification CC will only get the email notification and are not able to respond to the request, the response has to be done by the user who has been sent the request).

The view of a requested Visit/Audit will look as below. Note that the request can be viewed/edited/cancelled through the menu button on the right side of the record.

**Visiting & Schedule Manager**

**Scheduled** ← Received ○ Recommended 📅 Calendar

Date (From)  Site  Supplier  Audit Type  Auditor  Visit Type  Status

Date (To)  Supplier Type  Supplier Sub Type  Supplier Associated Site  Supplied Via  Country  Associated Site Status

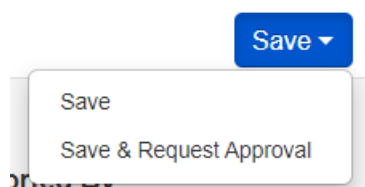
	Date	Site	Auditor	Supplier	Supplied Via	User Notified	Type	Status
<b>November 2020</b>								
<input type="checkbox"/>	09/11/2020 Week 46	Group	Steve Jones	Apo Fruit		User 1 Abattoir	Audit Generic Meat Audit	Awaiting Response
<b>September 2020</b>								
<input type="checkbox"/>	09/09/2020 Week 37	Group	Steve Jones	Acorn Produce			Audit Abattoir & Boning Room Audit Cold Storage	Accepted

### 1.4.1 REQUESTING A VISIT/AUDIT (WITH APPROVAL FUNCTION)

Note – if the user creating the visit/audit is also the user who can approve they will follow the process above without any need to complete the additional approval step

Follow steps 1 & 2 above

**Step 3:** Select the **Save** button and select either **Save** or **Save & Request Approval**. Selecting to Save & Request Approval will send notification to the user(s) assigned as approver in the Admin section.




The status of this Visit/Audit request will show as *Awaiting Approval*. This request will not be visible to the supplier until after the approval has been completed.

### 1.4.2 APPROVING A REQUESTED VISIT/AUDIT

Following email notification of Approval being required the item will show in the users task list

**Step 1:** From Scheduled Visit/Audits screen select the record with the status of *Awaiting Approval* and select the button to the right side of the record.

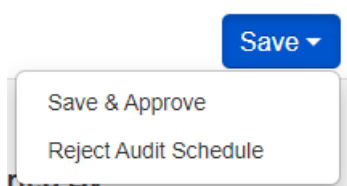
**Step 2:** The options will show *View* and *Approve* – select the option required

<b>Audit</b> Supplier Audit	Awaiting Approval	  View  Approve
<b>Audit</b> Supplier Audit	Accepted	

*View* – will take the user to just see the Visit/Audit request record

*Approve* – will take the user to view the Visit/Audit request record with the option to then approve or decline the request

**Step 3:** After reviewing the information on the request select **Save** button and then select the appropriate option.



The status of an approved audit/visit will show as *In Progress*

The status of a rejected audit/visit will show as *Approval Declined*

Notification about the approval or rejection will be sent to the user that created the audit/visit

If the audit/visit has been approved it can be shared with the supplier, for their agreement, as per the usual process.

## 1.5 RESPONDING TO A REQUESTED VISIT/AUDIT

User will receive email notification and the request requiring response will also appear in their task list.

**Step 1:** Either select the item from the *My Tasks* list or select **Upcoming Supplier Visits** from the *Supplier Approval* menu.

The screenshot shows the 'Supplier Approval' dropdown menu. The 'Upcoming Supplier Visits' option is highlighted with a red box and a mouse cursor. The menu also includes sections for 'Customer Tools' and 'Supplier Tools'.

**Step 2:** Under the *Received* heading any items awaiting a response will be shown with the status of 'Requires Your Action'. Select the **View** button to review the details of the request or select **Respond** button.

The screenshot shows the 'Visiting & Schedule Manager' interface. The 'Received' tab is active. A table displays audit items, with one item highlighted in orange and labeled 'Requires Your Action'. The 'View' and 'Respond' buttons for this item are highlighted with red boxes.

Week	Date	Company	Auditor	Auditing Site	User Notified	Audit Type	Status	
46	09/11/2020	Demo Co (Group)	Steve Jones	Group	User 1 Abattoir	Audit Generic Meat Audit	Requires Your Action	View Respond

**Step 3:** Review the details of the visit and if all is acceptable the user can select the **Submit** button.

Or

**Step 3:** Review the details of the visit and if the date is not suitable the user has a choice to either select **Decline** or add an alternative date (see details on that in section 1.5.1 below) for the visit/audit and select the **Submit** button.



News & Statistics ▾

Supplier Approval ▾

Quality Management ▾

Trading & Planning ▾

More ▾

User 1 ▾

Visiting & Schedule Manager - View ← Back

Scheduled

← Received

○ Recommended

Calendar

Select the dates below you wish to accept and the auditor will confirm

Company:

Demo Co(Group)

Auditor:

Steve Jones

Supplier:

Apo Fruit

Audit Overview:

In the event of there being a critical failure, i.e. a failure to comply with a food safety or legal issue, then the site will not be approved for use by Demo Co.

Shared With:

User 1 Abattoir

Select Audit Date:

☒ 09/11/2020

Propose New Date (Optional):

Add Date

Additional Comments

File Attachments

Choose File

No file chosen

Choose File

No file chosen

Choose File

No file chosen

Visit Types

Type

Generic Meat Audit

Responses

Response Date	User	Requested Date	Comment	Attached Files
30/10/2020	Steve Jones	09/11/2020	Initial Request	

Decline

Submit

If a new date has been suggested it will return to the original sender for them to confirm acceptance of that new date. All communication and history of the request will be visible on the record under the 'Responses' heading.

### 1.5.1 REQUESTING AN ALTERNATIVE VISIT/AUDIT DATE

When a request has been made to a supplier for a visit or audit the supplier is able to review that request and suggest an alternative if they deem that the suggested date is not suitable.

**Step 1:** Either select the item from the *My Tasks* list or select **Upcoming Supplier Visits** from the *Supplier Approval* menu.

The screenshot shows the Foods Connected dashboard. The 'Supplier Approval' dropdown menu is open, displaying two columns of options. Under the 'Customer Tools' column, 'Upcoming Supplier Visits' is highlighted with a red box. The 'My Tasks' panel on the right shows a task for Steve Jones scheduled an audit for Apo Fruit, also highlighted with a red box.

**Step 2:** Under the *Received* heading any items awaiting a response will be shown with the status of 'Requires Your Action'. Select the **Respond** button.

**Step 3:** Review the details of the visit and select the calendar icon alongside '**Propose New Date (Optional)**'.

The screenshot shows the 'Visiting & Schedule Manager - View' page. The 'Received' tab is selected. The 'Propose New Date (Optional)' field is highlighted with a red box, showing a date selection calendar icon and an 'Add Date' button. Below this, there is a section for 'Additional Comments' and 'File Attachments'. The 'Responses' table at the bottom shows a response from Steve Jones on 26/01/2021, with a requested date of 01/02/2021 and a comment of 'Initial Request'.

Response Date	User	Requested Date	Comment	Attached Files
26/01/2021	Steve Jones	01/02/2021	Initial Request	

**Step 4:** Select the new date to propose to the auditor and ensure to click **Add Date**.

Select Audit Date: 01/02/2021

---

Propose New Date (Optional): 08/02/2021 Add Date

**Step 5:** This will then show on the record, additional dates can be added if the user wants to provide the auditor with options, just repeat the steps to add a new date. If required a user can add on a Comment (using the **Additional Comments** field) which will be recorded on the request. Then select **Submit**, this will send notification to the user who sent out the request for their review.

The view will be as below for the supplier, the record will be awaiting a response from the auditor.

Visiting & Schedule Manager

Scheduled

← Received

○ Recommended

Calendar

Site

All

Supplier

All

Audit Type

All

Auditor

All

Filter

Clear Filters

Week	Date	Company	Auditor	Auditing Site	User Notified	Audit Type	Status	
February 2021								
6	08/02/2021	Demo Co Head Office (Group)	Steve Jones	Group	User 1 Cold stores	Audit Abattoir & Boning Room Audit	Awaiting Response	View

## 1.5.2 RESPONDING TO AN ALTERNATIVE VISIT/AUDIT DATE REQUEST

When a request has been made to a supplier for a visit or audit the supplier is able to review that request and suggest an alternative if they deem that the suggested date is not suitable.

**Step 1:** From Scheduled Visit/Audits screen select the record with the status of *Requires Your Action* and select the button to the right side of the record.

**Step 2:** Select the **Respond** option from this list

Visiting & Schedule Manager							
<span>Scheduled</span> <span>← Received</span> <span>○ Recommended</span> <span>Calendar</span> <span>Admin</span>							
Date (From)	Site	Supplier	Audit Type	Auditor	Visit Type	Status	
	All	All	All	All	All	All	
Date (To)	Supplier Type	Supplier Sub Type	Supplier Associated Site	Supplied Via	Country	Associated Site Status	
	All	All	Demo Co Head Off	All	All	All	
<span>Add New Event</span> <span>Delete Selected</span> <span>Export to Excel</span>							
Date	Site	Auditor	Supplier	Supplied Via	User Notified	Type	Status
February 2021							
<input type="checkbox"/> 08/02/2021 Week 6	Group	Steve Jones	Cold Store		User 1 Cold stores	Audit Abattoir & Boning Room Audit	Requires Your Action
December 2020							
<input type="checkbox"/> 17/12/2020 Week 51	Group	Steve Jones	Abattoir 2		User 1 Abattoir 2	Audit Supplier Visit Audit	Declined
<input type="checkbox"/> 18/12/2020 Week 51	Group	Steve Jones	Acorn Produce			Audit Generic Meat Audit	In Progress

**Step 3:** The record for the visit/audit request will show, the user will be able to see the date that has been declined by the supplier and the new suggested date (if more than one has been suggested by the supplier they will show here and the user will need to ensure that the correct date is marked before responding). If the marked date is acceptable the user has to select the **Submit** button to accept the date and confirm with the supplier. If multiple dates have been offered, by selecting one as acceptable this will automatically decline the other dates.

Note – the user is able to add information to the **Additional Comments** field if required.

Visiting & Schedule Manager - View
Back

Scheduled
Received
Recommended
Calendar
Admin

Company: Demo Co Head Office(Group)  
Auditor: Steve Jones  
Supplier: Cold Store  
Audit Overview: In the event of there being a critical failure, i.e. a failure to comply with a food safety or legal issue, then the site will not be approved for use by Demo Co.  
Shared With: User 1 Cold stores  
Select Audit Date: ☒ 08/02/2021 ☐ 01/02/2021 (Declined)  
Propose New Date (Optional):  Add Date  
Additional Comments:   
File Attachments:  No file chosen  No file chosen  No file chosen

Visit Types
Type
Abattoir & Boning Room Audit

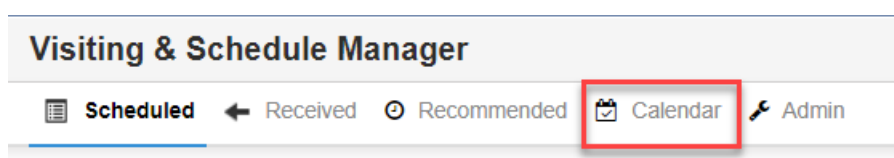
Responses

Response Date	User	Requested Date	Comment	Attached Files
26/01/2021	User 1 Cold stores	08/02/2021		
26/01/2021	Steve Jones	01/02/2021	Initial Request	

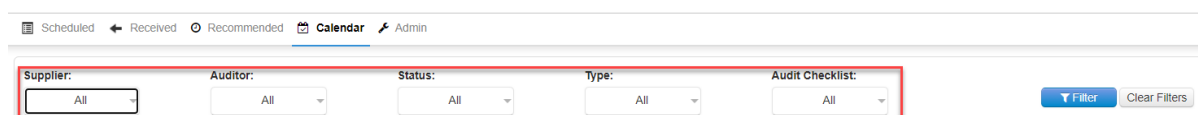
Decline
Submit

## 1.6 CALENDAR VIEW OF VISIT/AUDIT REQUESTS

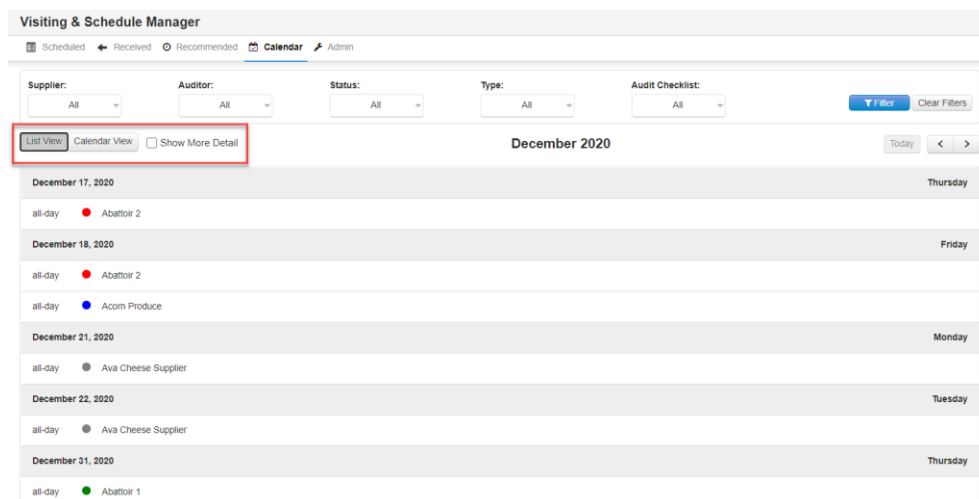
**Step 1:** From Scheduled Visit Audits screen select **Calendar**.



The view of the calendar can be modified using the filters at the top of the screen



The view of the visits/audits requested can also be amended to/from a list/calendar by using the buttons shown below, the level of detail in the view can also be amended here by toggling on or off the 'Show More Detail' checkbox.



List View with more detail shown

List View	Calendar View	<input checked="" type="checkbox"/> Show More Detail	December 2020	Today	<	>
December 17, 2020 Thursday						
all-day <span style="color: red;">●</span> Site: Demo Co (Group) Auditor: Steve Jones Supplier: Abattoir 2 Type: Audit - Supplier Visit Audit Status: Declined						
December 18, 2020 Friday						
all-day <span style="color: red;">●</span> Site: Demo Co (Group) Auditor: Steve Jones Supplier: Abattoir 2 Type: Audit - Supplier Visit Audit Status: Declined						
all-day <span style="color: blue;">●</span> Site: Demo Co (Group) Auditor: Steve Jones Supplier: Acorn Produce Type: Audit - Generic Meat Audit Status: In Progress						
December 21, 2020 Monday						
all-day <span style="color: grey;">●</span> Site: Demo Co (Group) Auditor: Steve Jones						

## Calendar view

Visiting & Schedule Manager

Scheduled

Received

Recommended

Calendar

Admin

Supplier:

All

Auditor:

All

Status:

All

Type:

All

Audit Checklist:

All

Filter

Clear Filter

List View

Calendar View

Show More Detail

December 2020

Today

<

>

Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat
49	29	30	1	2	3	4	5
50	6	7	8	9	10	11	12
51	13	14	15	16	17	18	19
52	20	21	22	23	24	25	26
1	27	28	29	30	31	1	2

Auditor 2

Auditor 2

Acorn Produce

Ava Cheese Supplier

Ava Cheese Supplier

Auditor 1

## Calendar view with more detail shown

Visiting & Schedule Manager

Scheduled

Received

Recommended

Calendar

Admin

Supplier:

All

Auditor:

All

Status:

All

Type:

All

Audit Checklist:

All

Filter

Clear Filters

List View

Calendar View

Show More Detail

December 2020

Today

<

>

Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat
49	29	30	1	2	3	4	
50	6	7	8	9	10	11	
51	13	14	15	16	17	18	
					<div> <div>Site: Demo Co (Group)</div> <div>Auditor: Steve Jones</div> <div>Supplier: Abaltor 2</div> <div>Type: Audit - Supplier Visit Audit</div> <div>Status: Declined</div> </div>	<div> <div>Site: Demo Co (Group)</div> <div>Auditor: Steve Jones</div> <div>Supplier: Abaltor 2</div> <div>Type: Audit - Supplier Visit Audit</div> <div>Status: Declined</div> </div>	
52	20	21	22	23	24	25	
	<div> <div>Site: Demo Co (Group)</div> <div>Auditor: Steve Jones</div> <div>Supplier: Ava Cheese Supplier</div> <div>Type: Audit - Ingredients Packaging</div> <div>Status: Awaiting Response</div> </div>	<div> <div>Site: Demo Co (Group)</div> <div>Auditor: Steve Jones</div> <div>Supplier: Ava Cheese Supplier</div> <div>Type: Audit - Ingredients Packaging</div> <div>Status: Awaiting Response</div> </div>			<div> <div>Site: Demo Co (Group)</div> <div>Auditor: Steve Jones</div> <div>Supplier: Acorn Products</div> <div>Type: Audit - Generic Meat Audit</div> <div>Status: In Progress</div> </div>		
1	27	28	29	30	31	1	
					<div> <div>Site: Demo Co (Group)</div> <div>Auditor: Steve Jones</div> <div>Supplier: Abaltor 1</div> <div>Type: Audit - Abaltor &amp; Dining Room</div> <div>Status: Accepted</div> </div>		

The colour coding of the records here shows the status

Grey – Awaiting Response

Red – Declined

Blue – In Progress

Green – Accepted

A user is also able to hover over any of the records to get additional details

List View Calendar View ☒ Show More Detail December 2020 Today < >

December 17, 2020 Thursday

all-day ● **Site:** Demo Co (Group)  
**Auditor:** Steve Jones  
**Supplier:** Abattoir 2  
**Type:** Audit - Supplier Visit Audit  
**Status:** Declined

December 18, 2020 Friday

all-day ● **Site:** Demo Co (Group)  
**Auditor:** Steve Jones  
**Supplier:** Abattoir 2  
**Type:** Audit - Supplier Visit Audit  
**Status:** Declined

all-day ● **Site:** Demo Co (Group)  
**Auditor:** Steve Jones  
**Supplier:** Acorn Produce  
**Type:** Audit - Generic Meat Audit  
**Status:** In Progress

**Site:** Demo Co (Group)  
**Auditor:** Steve Jones  
**Supplier:** Abattoir 2  
**Type:** Audit - Supplier Visit Audit  
**Status:** Declined  
**Proposed Date(s):**  
17/12/2020, 18/12/2020

**Audit Overview:** In the event of there being a critical failure, i.e. a failure to comply with a food safety or legal issue, then the site will not be approved for use by Demo Co.