TOOL USER GUIDE

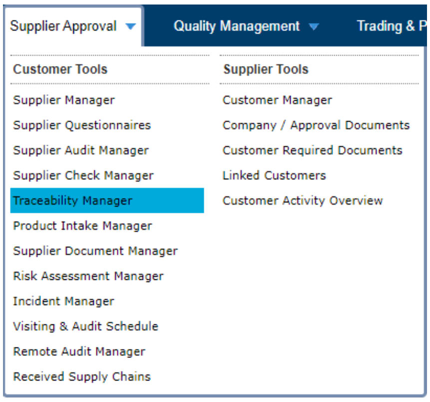
TRACEABILITY MANAGER

CONTENTS

1. SETTING UP TRACEABILITY MANAGER

1.1. ACCESSING TRACEABILITY MANAGER

Step 1: To access Traceability manager, navigate to **Supplier Approval > Traceability Manager**

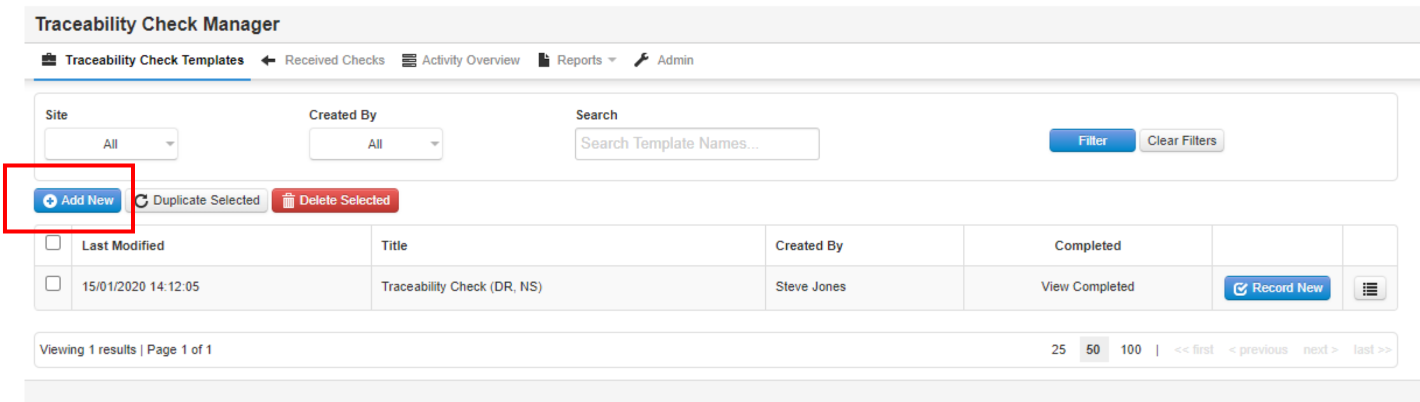


1.2. ADDING A NEW TRACEABILITY TEMPLATE

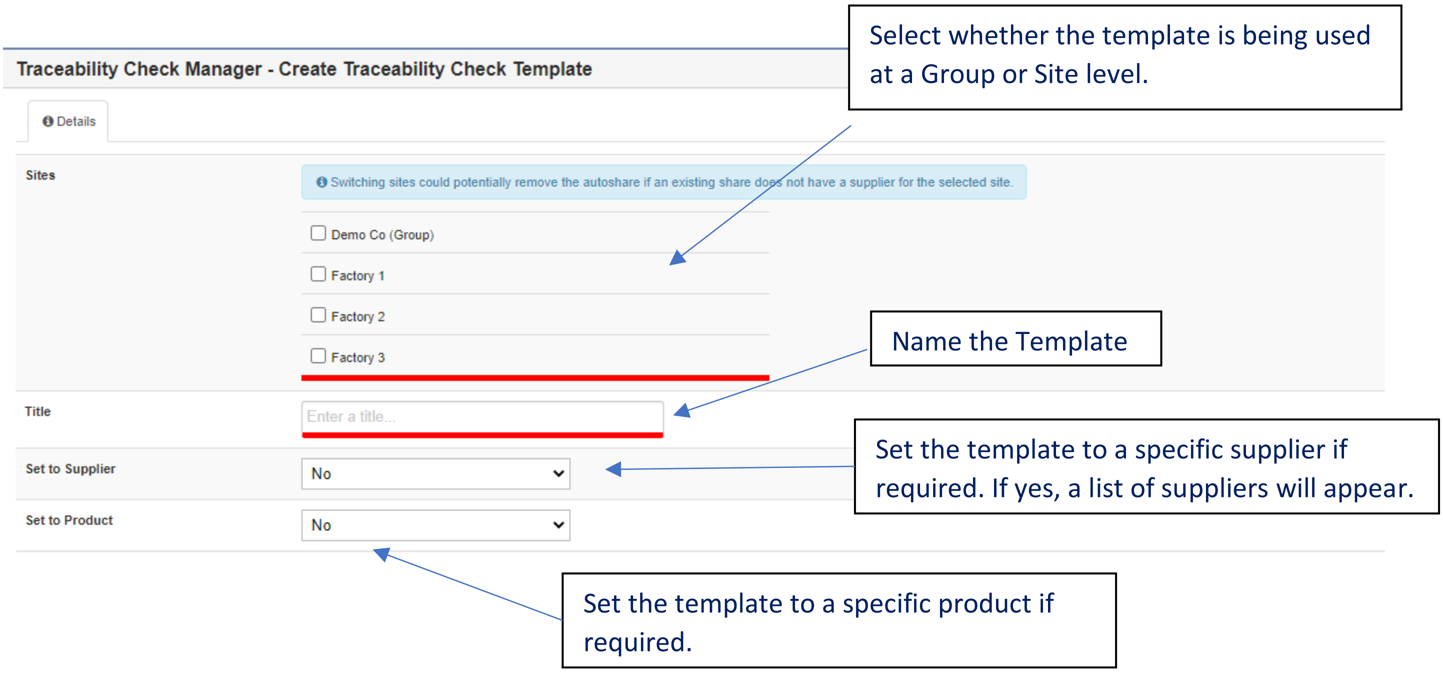
When setting up a new traceability template, there are 3 templates to create, 1) Traceability Check Template, 2) Response Template (for your supplier to complete) and 3) Confirmation Template (optional). Sections 1.2.1. to 1.2.3. example how to set up each template.

1.2.1. ADDING A NEW TRACEABILITY CHECK TEMPLATE

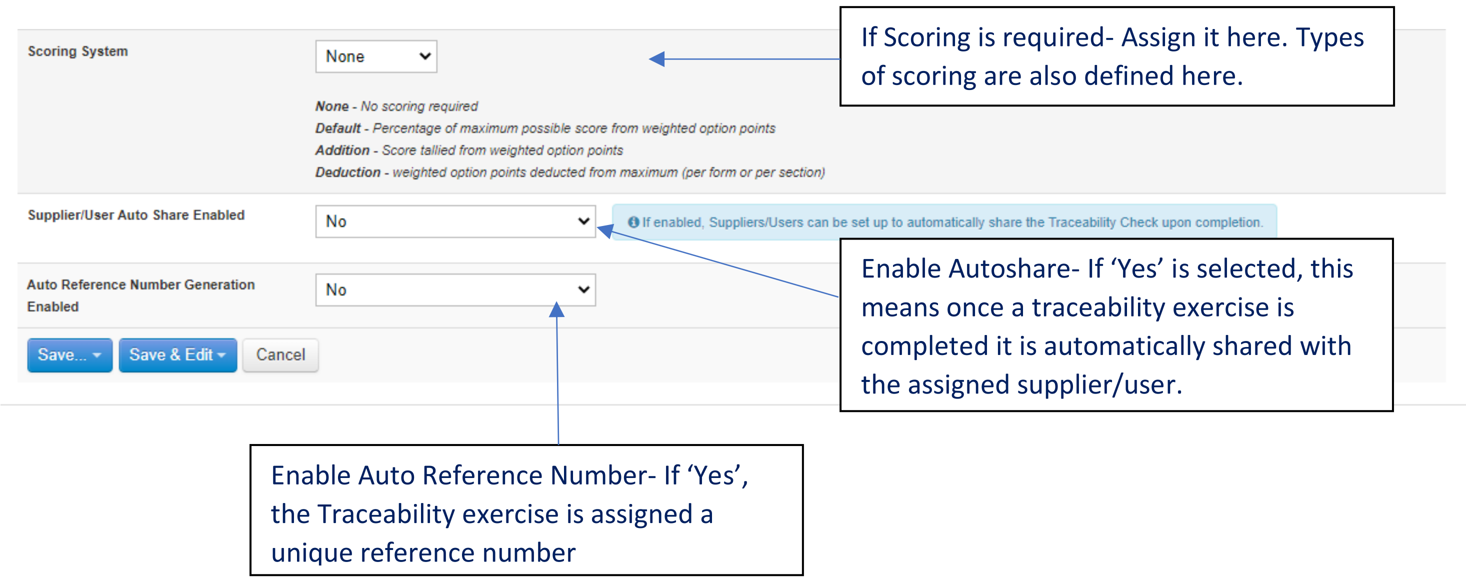
Step 1: To add a New Traceability Template, select **+ Add New** on the left-hand side of the page



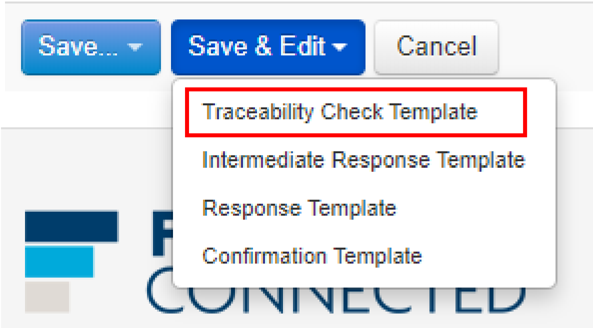
Step 2: Set up the Traceability template details



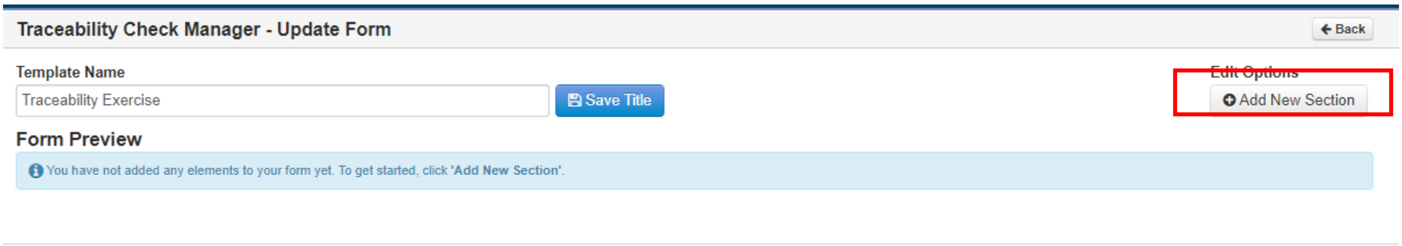
If 'Set to Supplier' is enabled there is also the option to set an intermediate supplier who can manage traceability exercises using your traceability template.



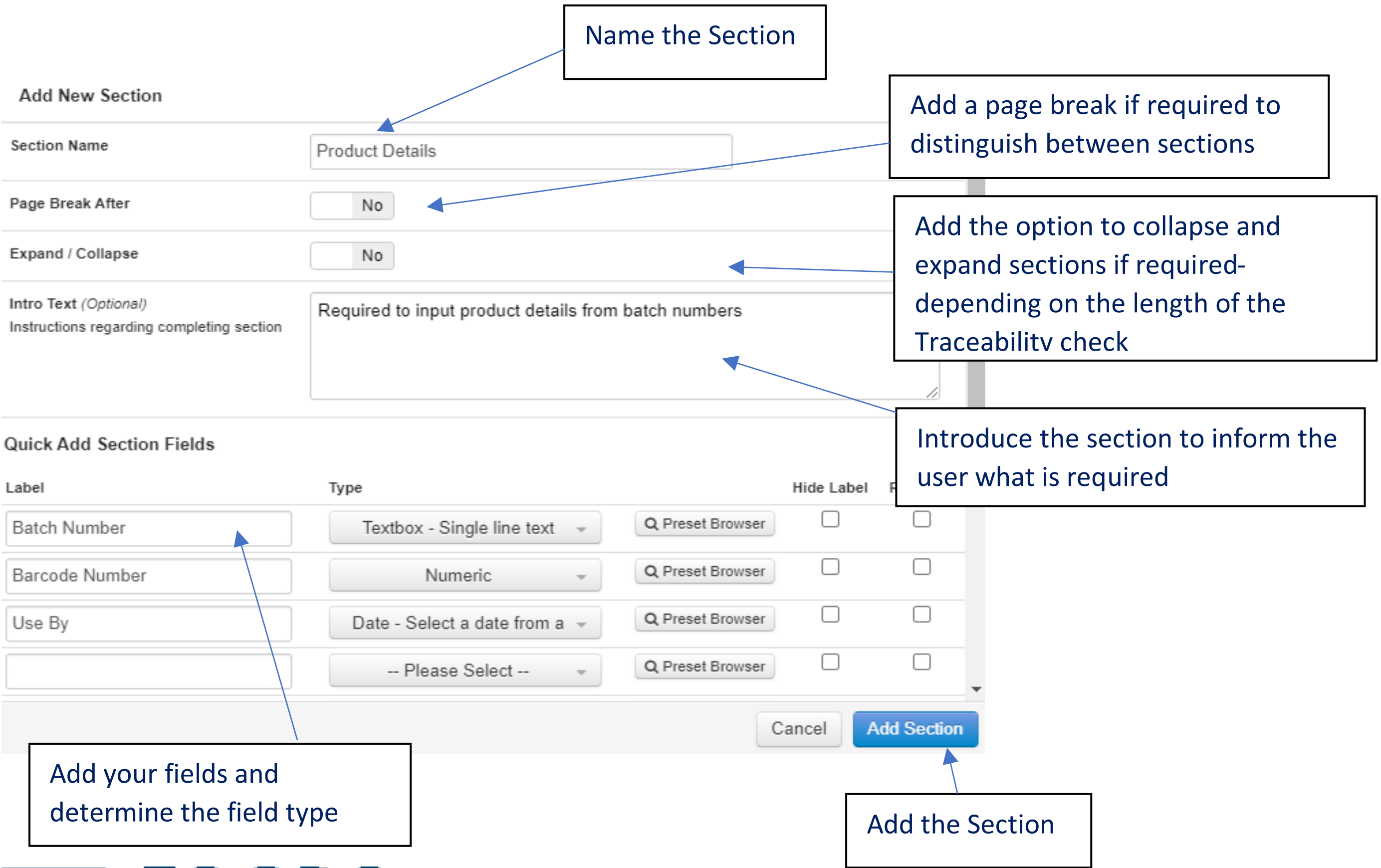
Step 3: Save and Edit the Traceability Check Template



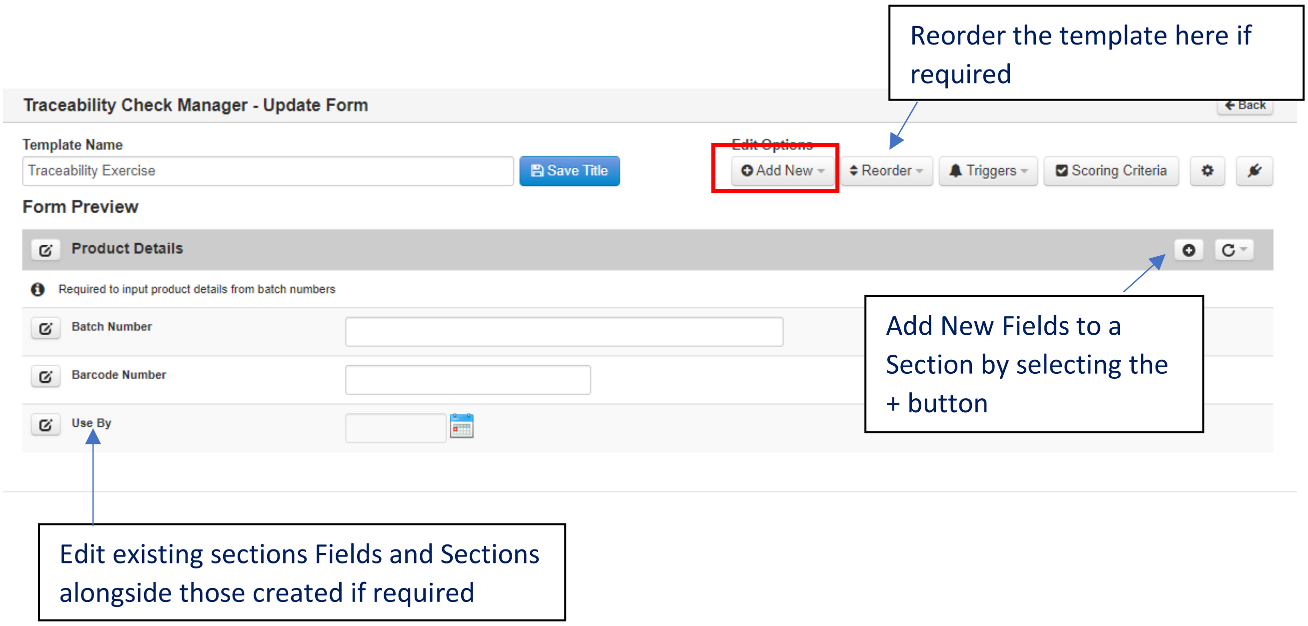
Step 4: Start to build your Traceability Check Template - Select **+ Add New Section**



Step 5: Create the detail of your section.

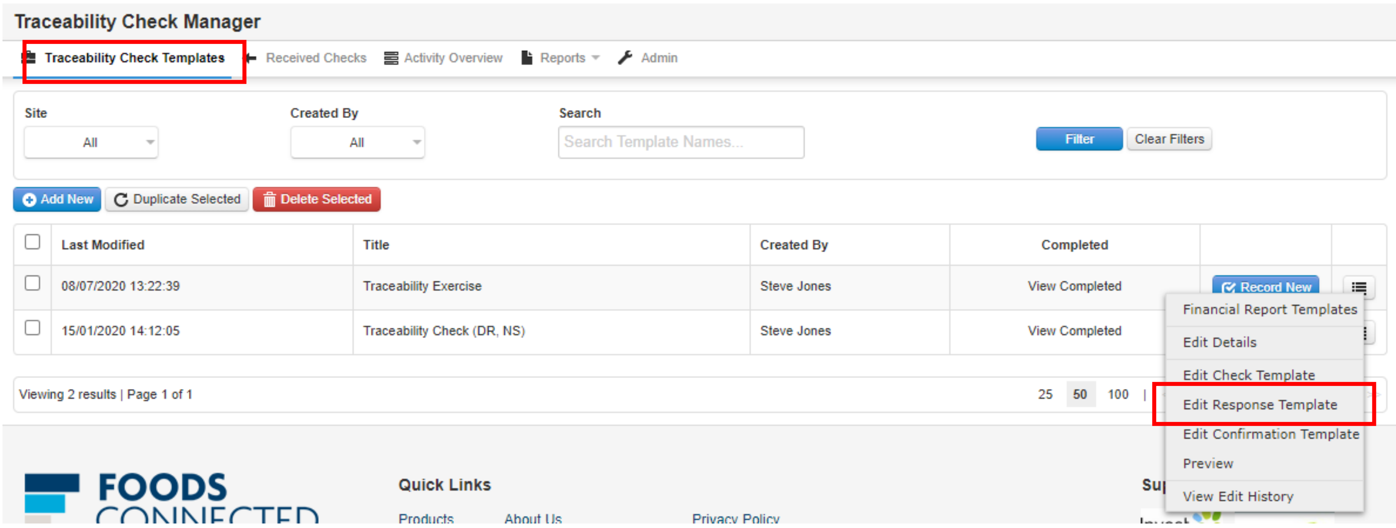


This process can be repeated for subsequent sections of the Traceability Check by selecting **'Add New'.**



1.2.2. ADDING A TRACEABILITY RESPONSE TEMPLATE

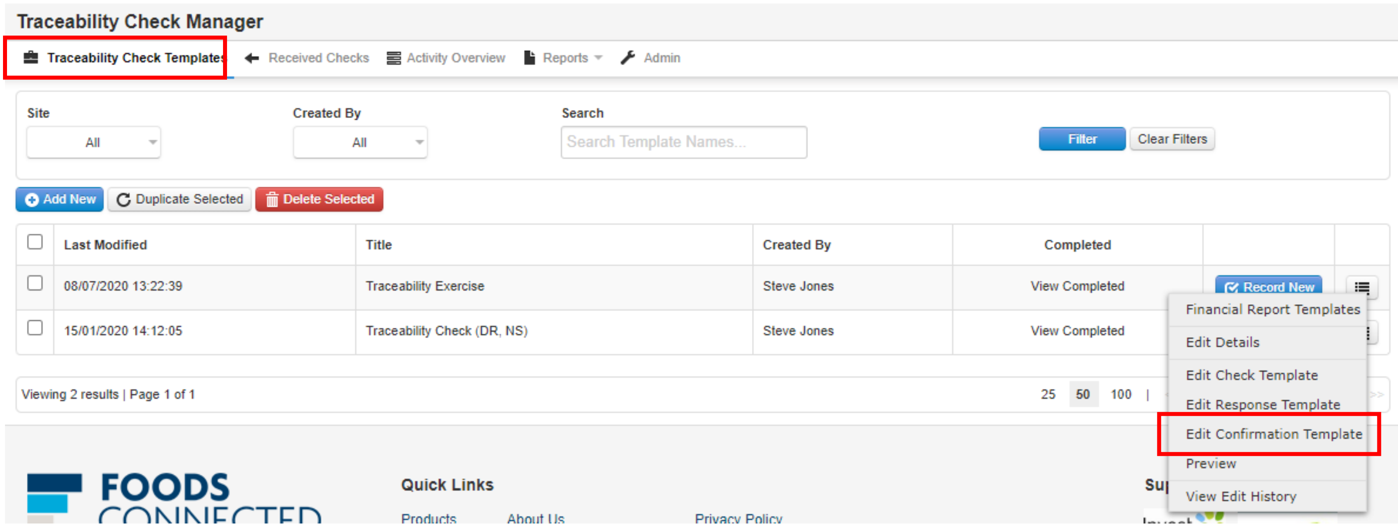
Step 1: Under Traceability Check Templates you can set up the **Response Template** by selecting options and **Edit Response Template**.



Step 2: Follow the same steps in 1.2.1 to create the response template (steps 4-6).

1.2.3. ADDING A TRACEABILITY CONFIRMATION TEMPLATE

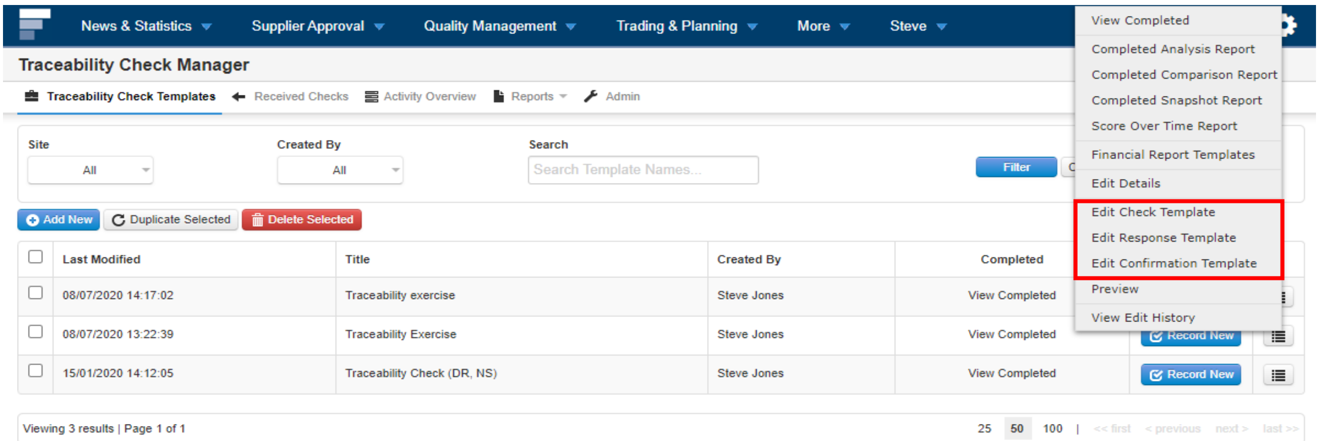
Step 1: Under Traceability Check Templates you can set up the **Confirmation Template** by selecting options and **Edit Confirmation Template**.



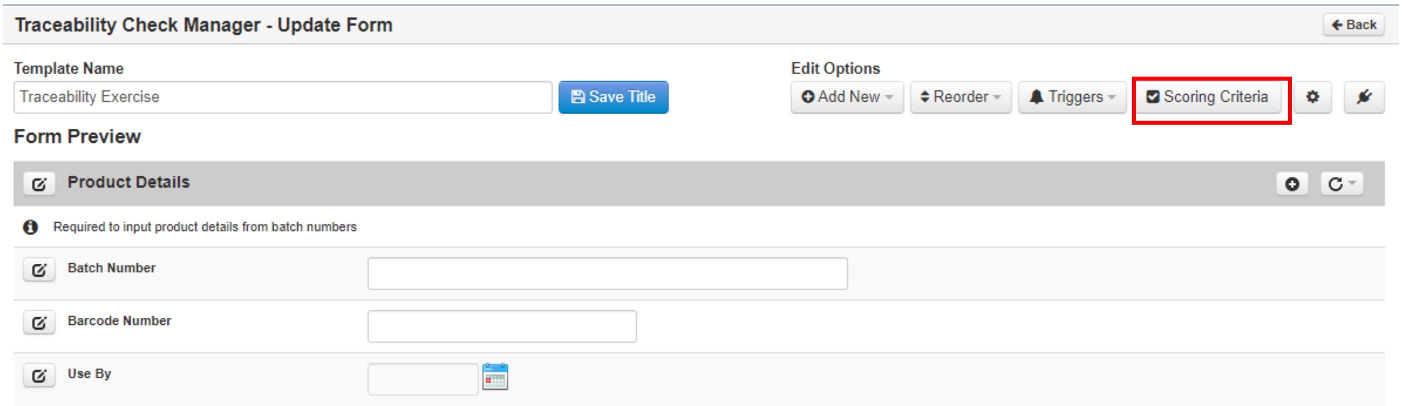
Step 2: Follow the same steps in 1.2.1 to create the confirmation template (steps 4-6).

1.3. SETTING UP SCORING

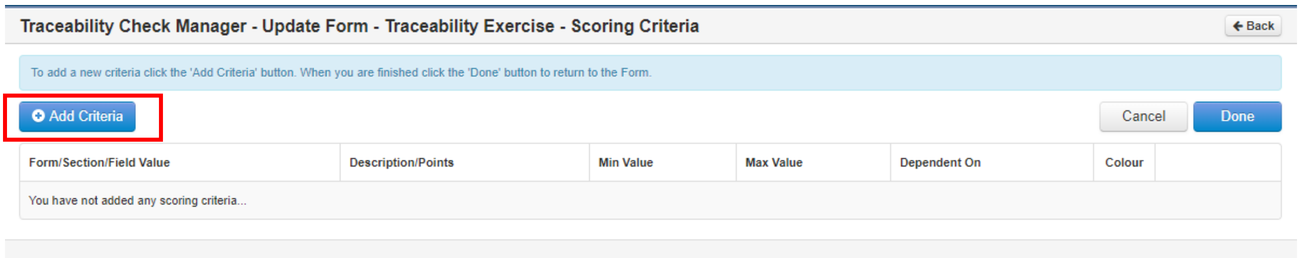
Step 1: To set up scoring select **Edit Check Template, Response Template or Confirmation Template** - Scoring Criteria can be assigned within each



Step 2: Within each template there is a button at the top right which says **Scoring Criteria**, select this button.

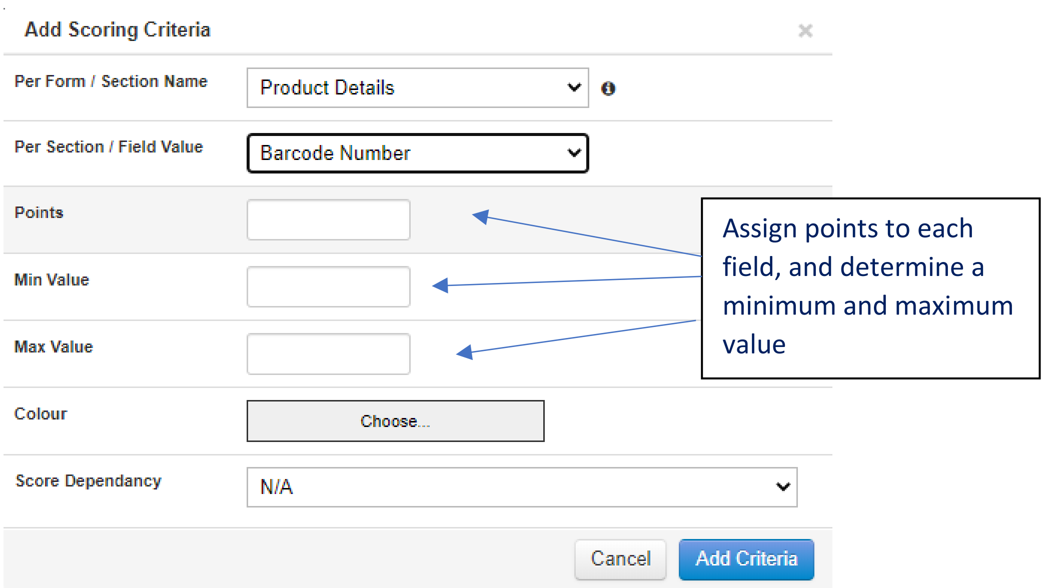


Step 3: At the top left select **+ Add Criteria**



Step 4: Scoring can be assigned to the form template (Traceability Check, Response or Confirmation template) or assigned to specific sections within the form using the 'Add Scoring Criteria' window.

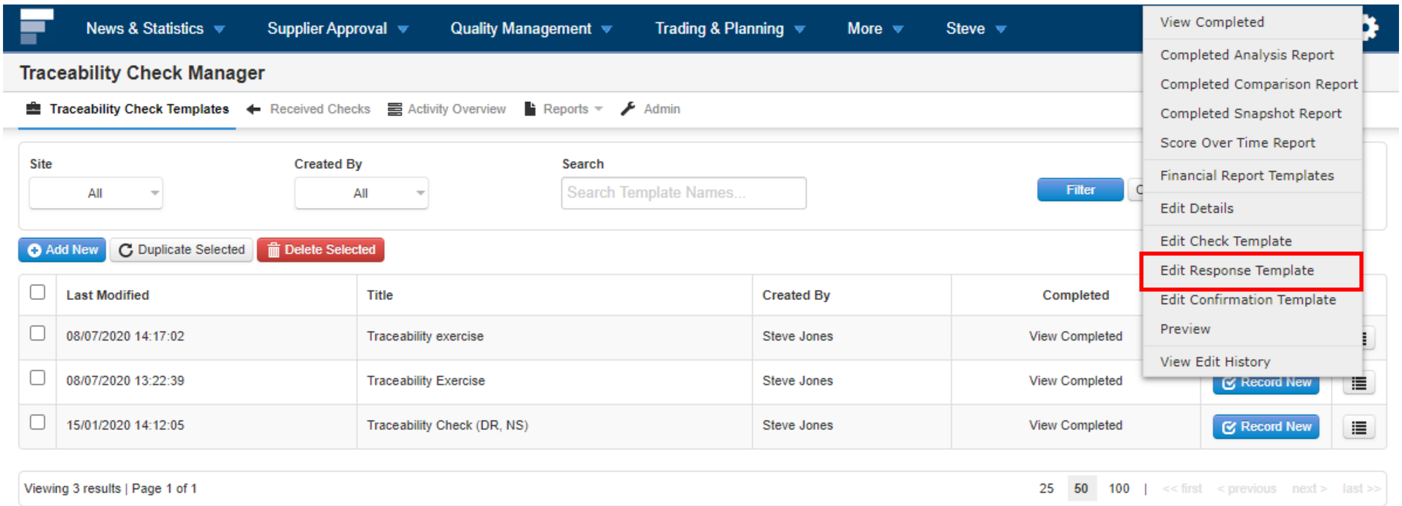
If scoring for a specific section is applied, points for each field can be specified.



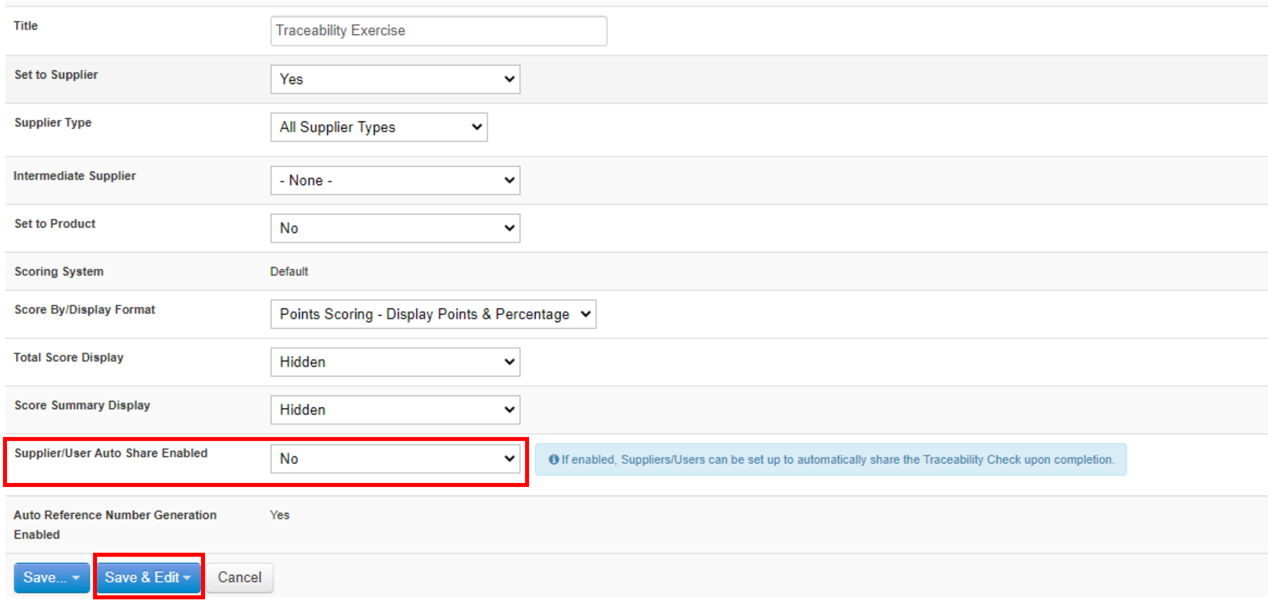
1.4. AUTOSHARE SET UP

Step 1: Autoshare can be added when initially setting up the template (See Section 1.2.1, Step 2).

You can also add autoshare after template set up by selecting the options button on the right hand side of the template set up and selecting **Edit Details**.

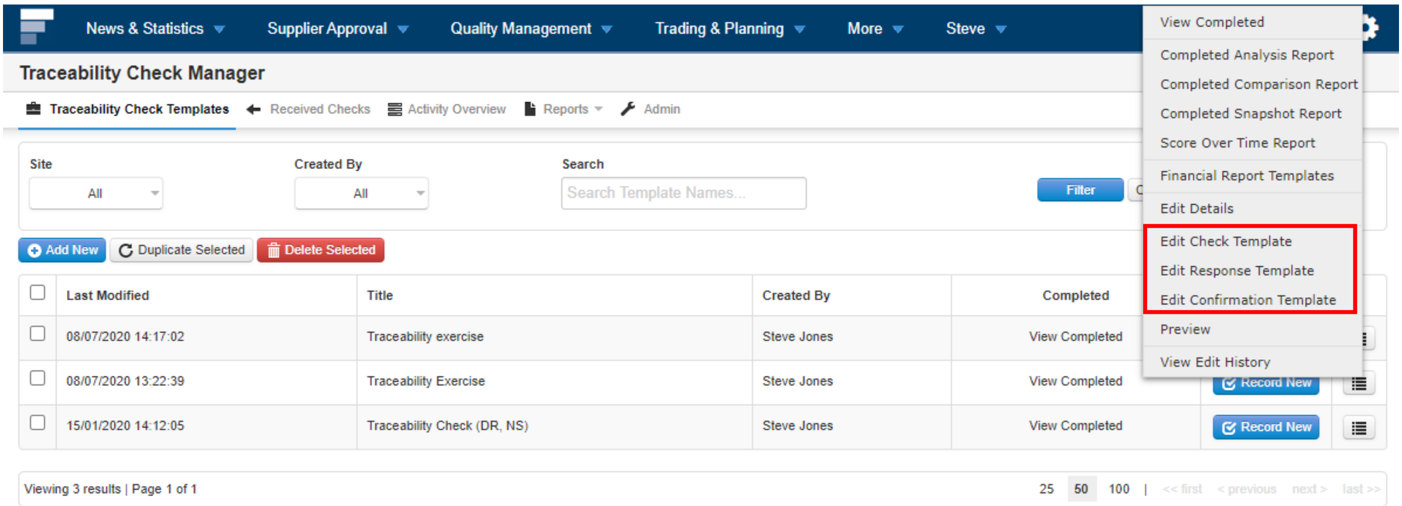


Step 2: Enable Autoshare and select **Save and Exit**

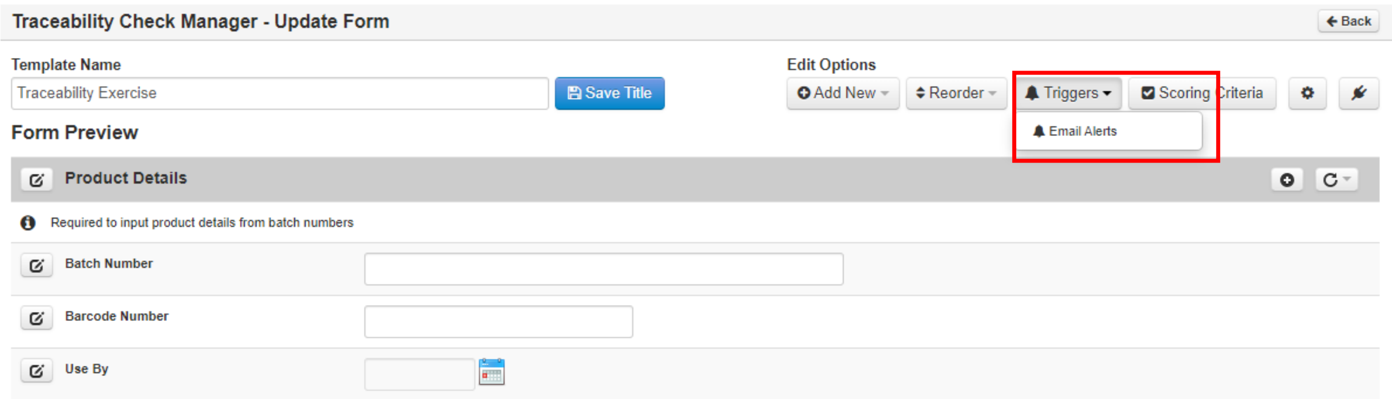


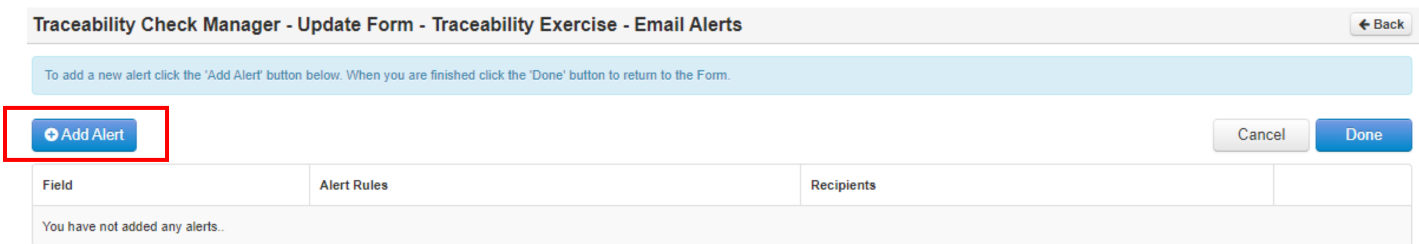
1.5. CREATING EMAIL NOTIFICATIONS TRIGGERS ON TEMPLATES

Step 1: To create **Email Notification Triggers** select **Edit Check Template**, Response Template or Confirmation Template

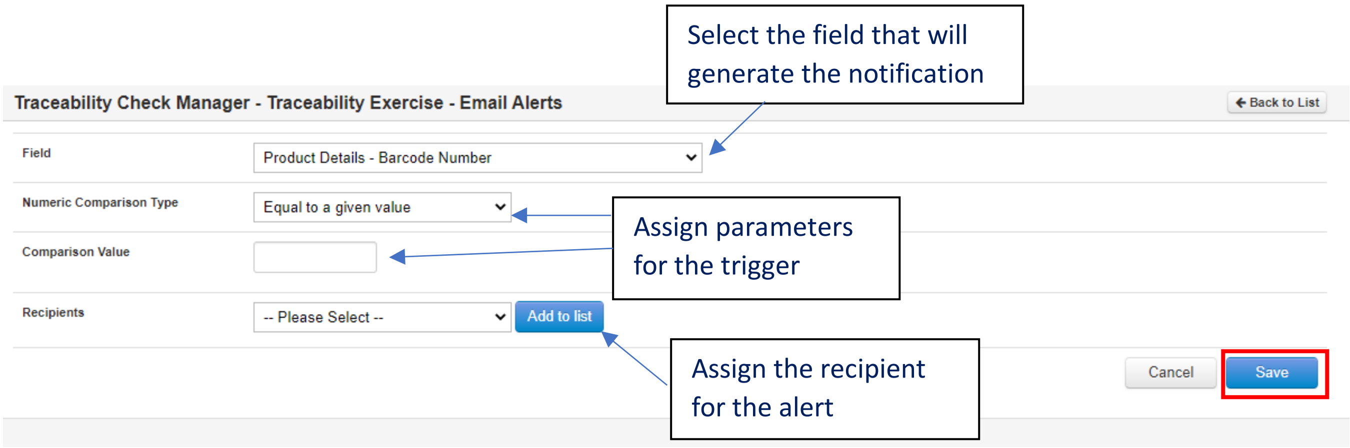


Step 2: Within each template there is a button at the top right which says **Triggers**. Select **Email Alerts** from the dropdown and then press **'Add Alert'** button.





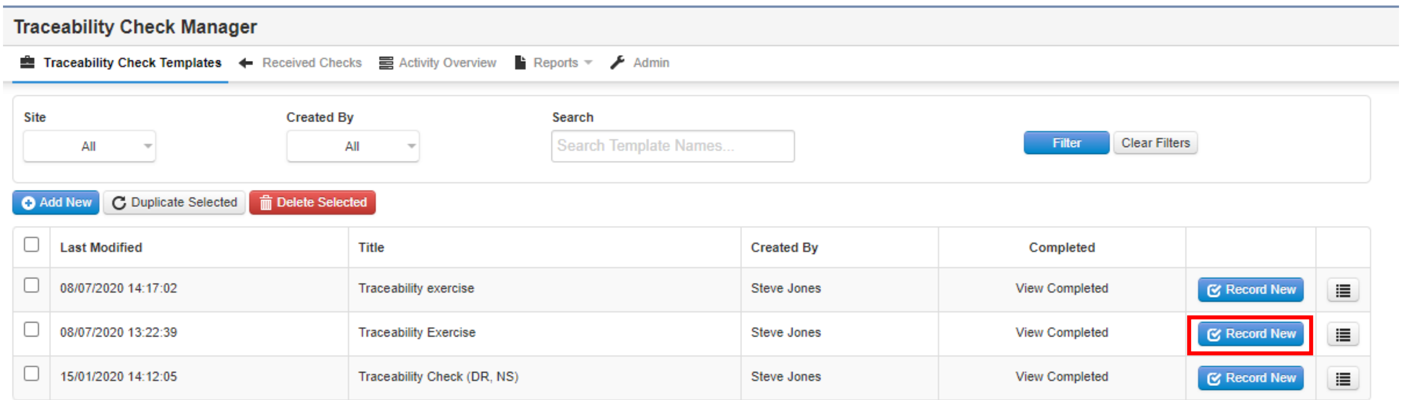
Step 3: Choose the field that you require the email alert to be triggered by and assign specific parameters to trigger the notification and select save.



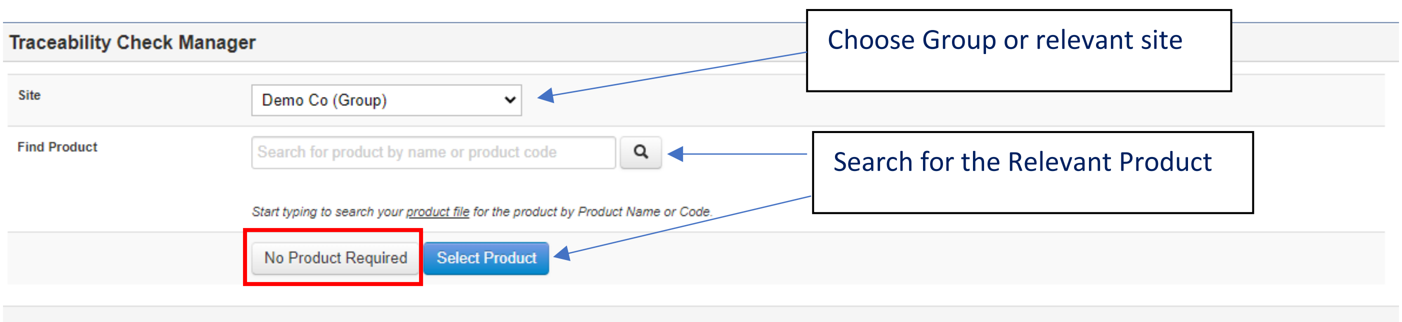
2. RECORDING A NEW TRACEABILITY CHECK

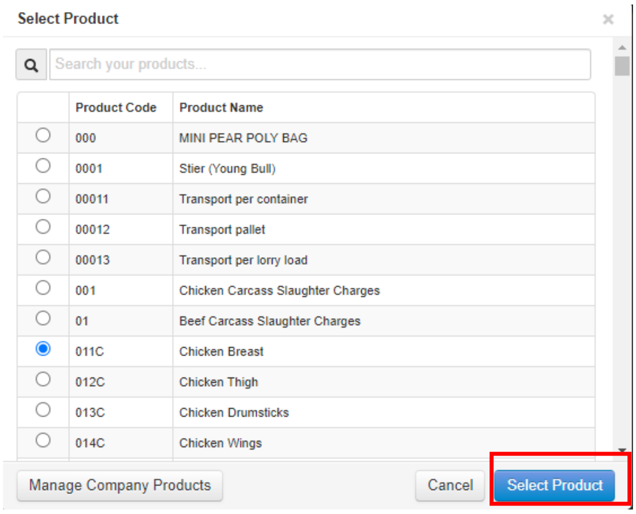
2.1. HOW TO COMPLETE A TRACEABILITY EXERCISE

Step 1: Select **Record New** next to the Traceability template you wish to conduct the traceability exercise for. Completing the Traceability Check Form enables you to provide the necessary detail to your suppliers as to what you require from them.

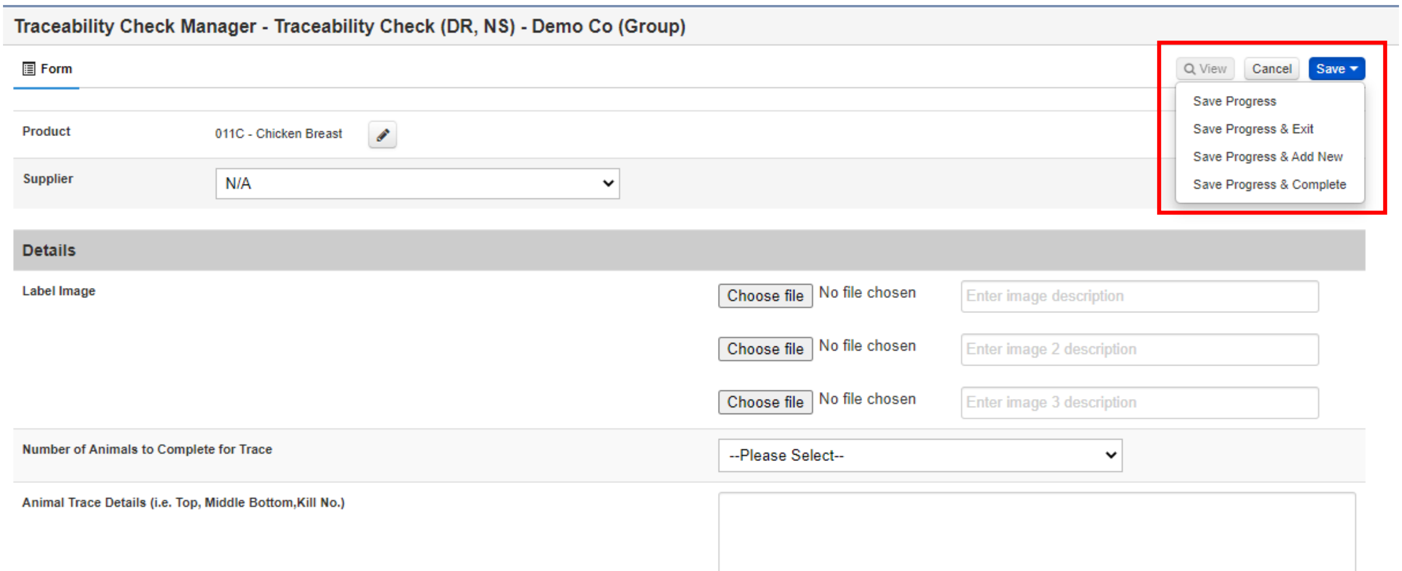


Step 2: Choose the site which is relevant to the traceability exercise and select the relevant product from the pop out window, if required. If not required, select No Product Required





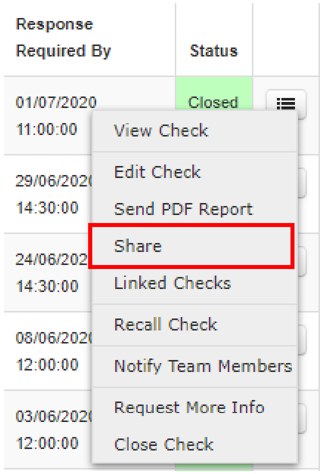
Step 3: Complete the template. You can **Save Progress or Save and Exit,** directing you back to the home page, or **Save and Add New** which opens a new template, or to complete the check, **select Save and Complete.**



FOODS CONNECTED

2.2. SHARING A TRACEABILITY TEMPLATE WITH YOUR SUPPLIER

Step 1: If auto-share is enabled this will share the response template with the relevant suppliers to complete their traceability requirements. If Auto-share is not enabled, you can share the traceability template with suppliers via options button and selecting share.

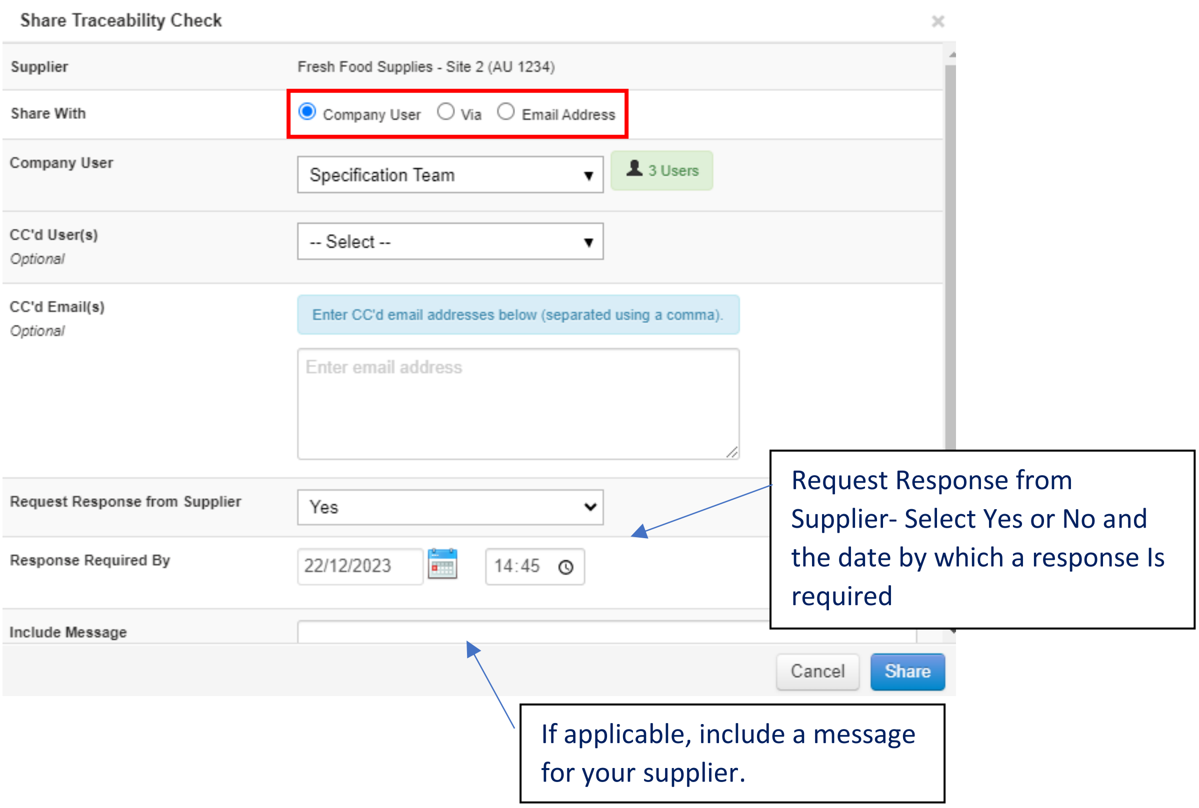


Step 2: The Traceability Check can then be shared with supplier a variety of ways. Either by using the Company User, Via or Email Address.

Company User: select a Foods Connected user from the dropdown.

Email Address: you can type the email of contact you want to send the check to.

Via: this can be used to send the check to an intermediary such as an agent to complete on behalf of the supplier.

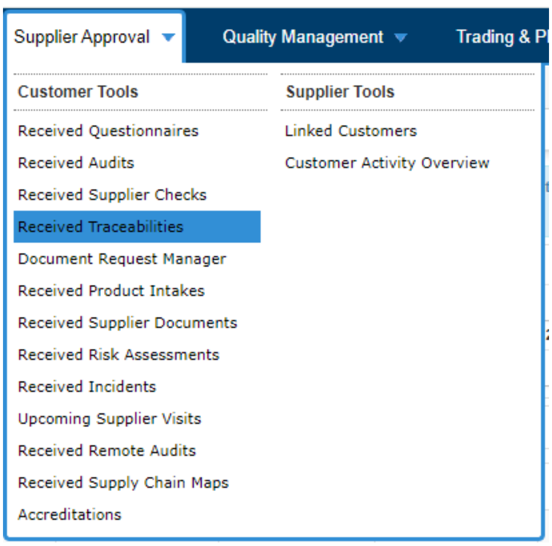


3. COMPLETING A RESPONSE TO A TRACEABILITY CHECK ASSIGNED TO YOU(AS A SUPPLIER)

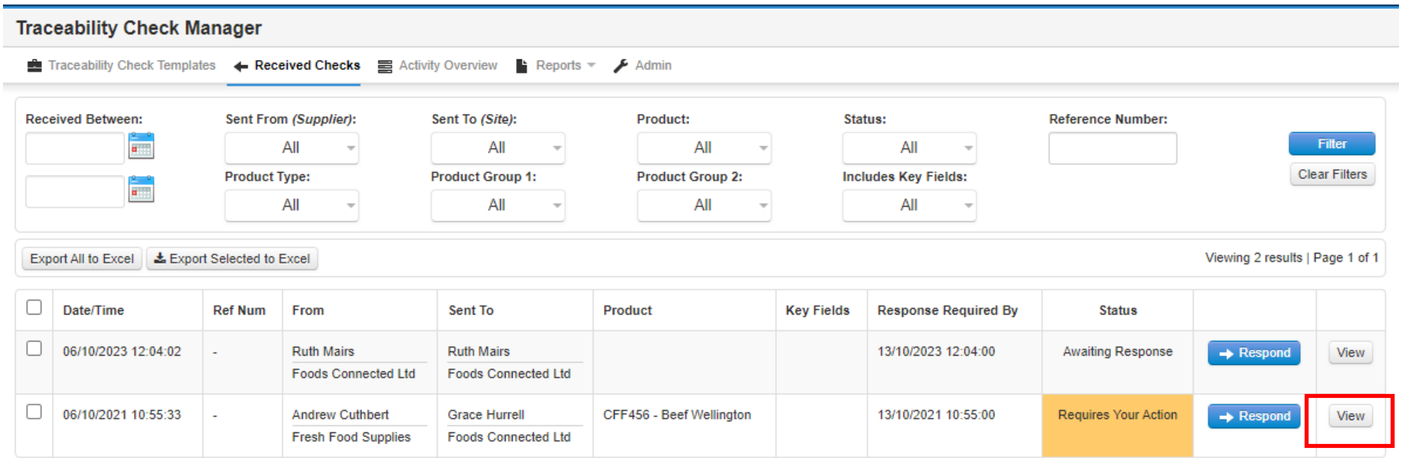
3.1. HOW TO VIEW TRACEABULITY CHECK DETAILS

Step 1: As a supplier, you will receive a notification via email to complete a traceability check. The notification is also available under ‘My Tasks’ upon logging into Foods Connected.

Alternatively, you can go to the **Received TraceabilitIES** tab under the Supplier Approval menu to see that the check requires action.



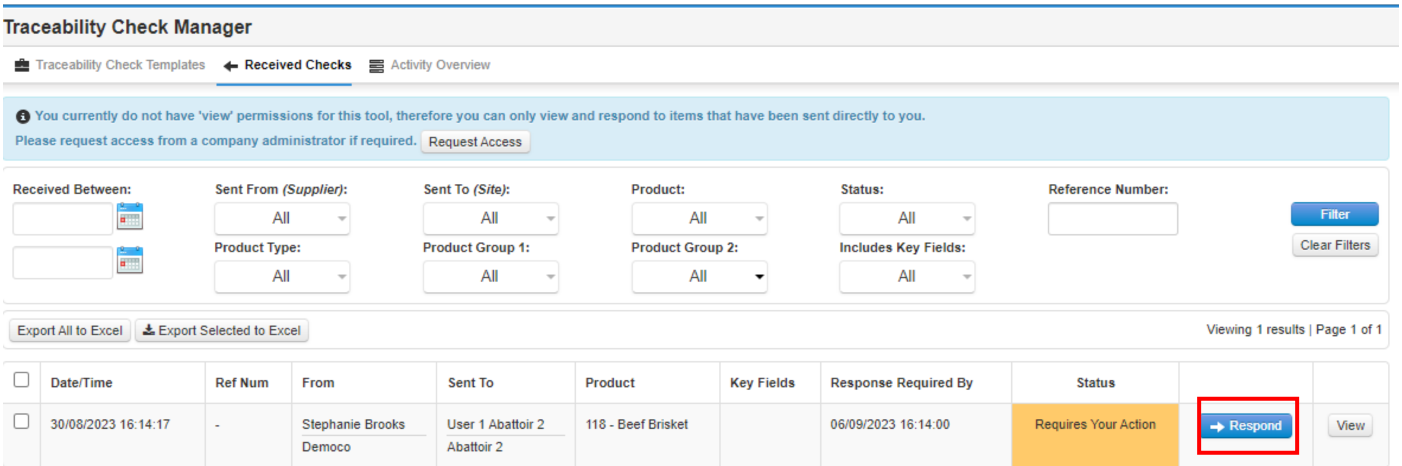
Step 2: Select the relevant check that requires action to view and this will open the check. Close when done.



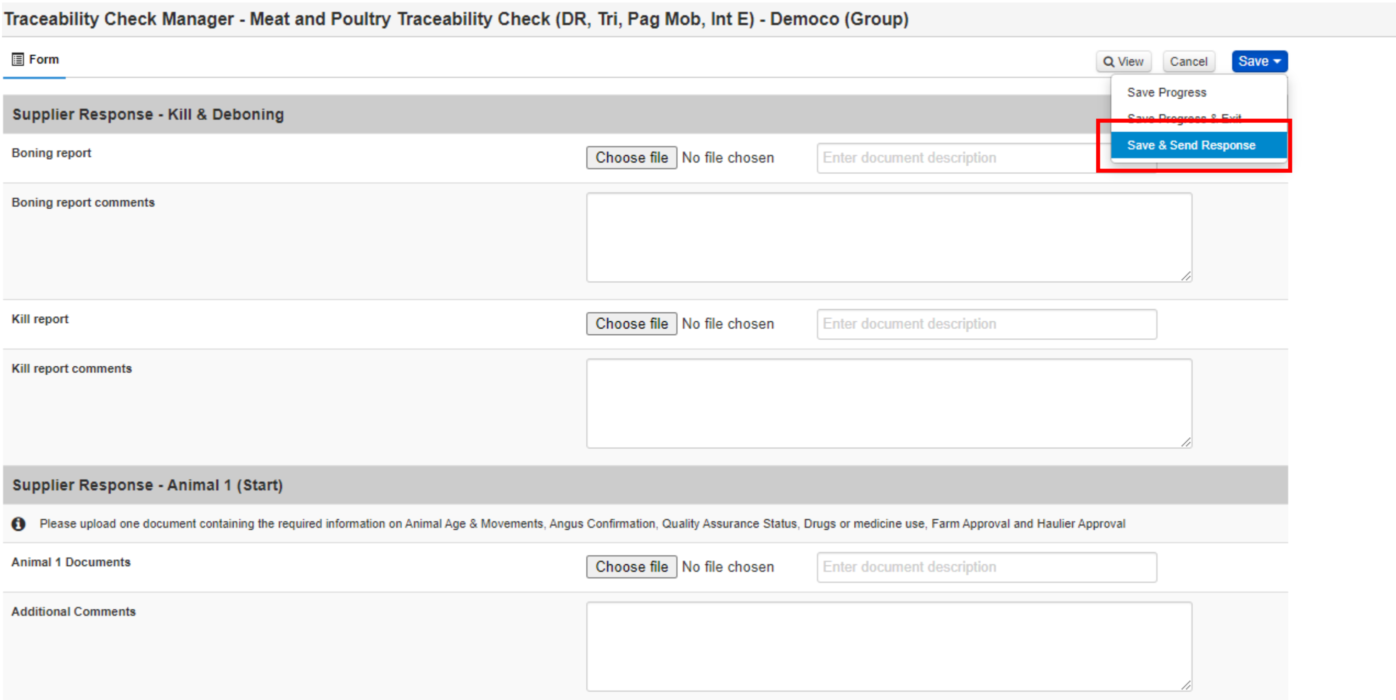
3.2. HOW TO COMPLETE THE RESPONSE TEMPLATE

Proceeding Step 1 in 3.1, the following steps should be taken to complete the Response.

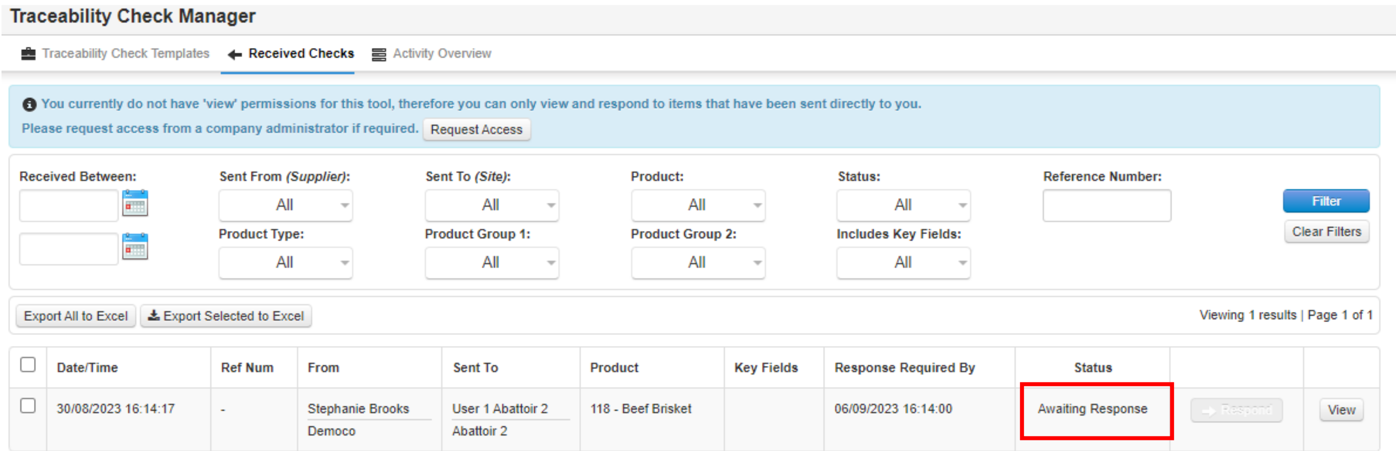
Step 1: Select the **Respond** button against the relevant check



Step 2: Complete the relevant response details and select **Save Progress and Send Response.**



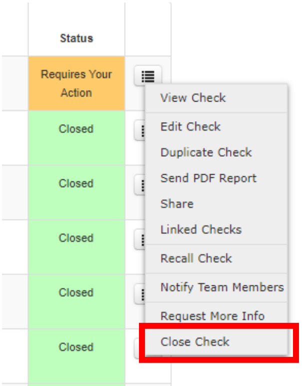
Step 3: The status now reverts to **Awaiting Response.**



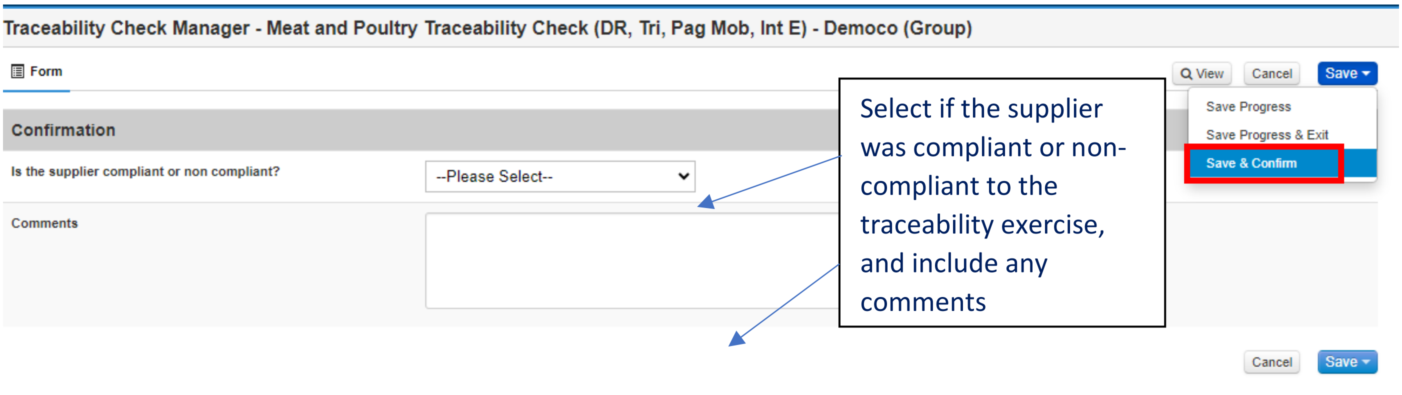
4. CONFIRMING A TRACEABILITY CHECK

When setting up your traceability template you can create a confirmation template which allows you to confirm your suppliers traceability exercise, one they have returned their response.

Step 1: To complete the confirmation template, go to the response to your traceability exercise submitted by your supplier and select the options button on the right hand side of the relevant check, **select Close Check.**



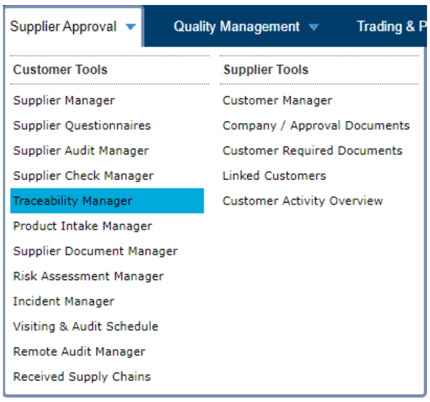
Step 2: You are then directed to your confirmation template to complete.



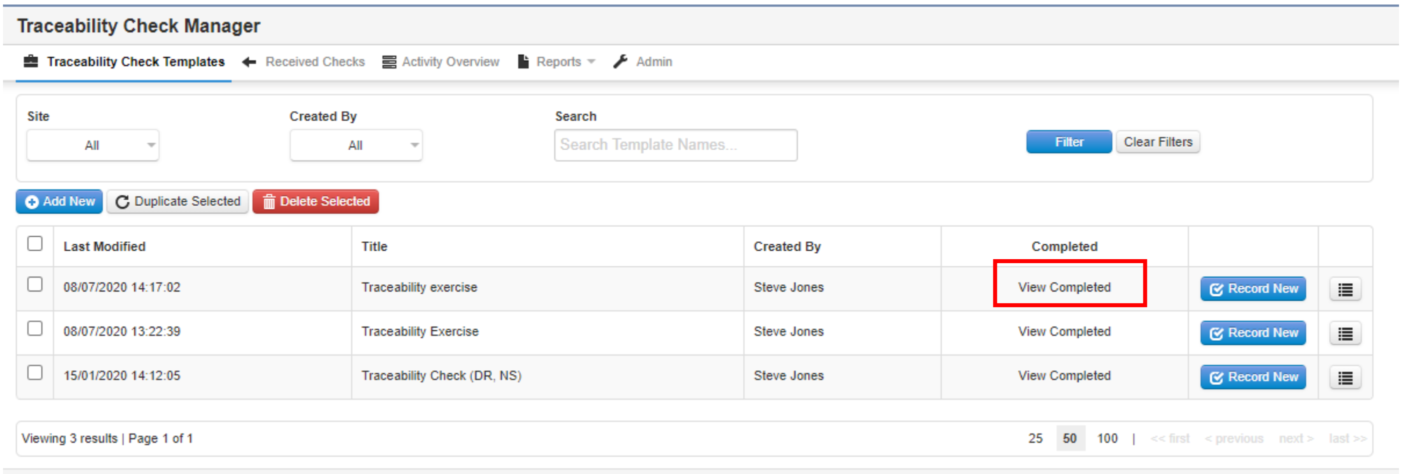
Step 3: Once finished, select **save and confirm**. If required you can Save Progress before confirming and closing the check.

5. VIEWING COMPLETED TRACEABILITIES

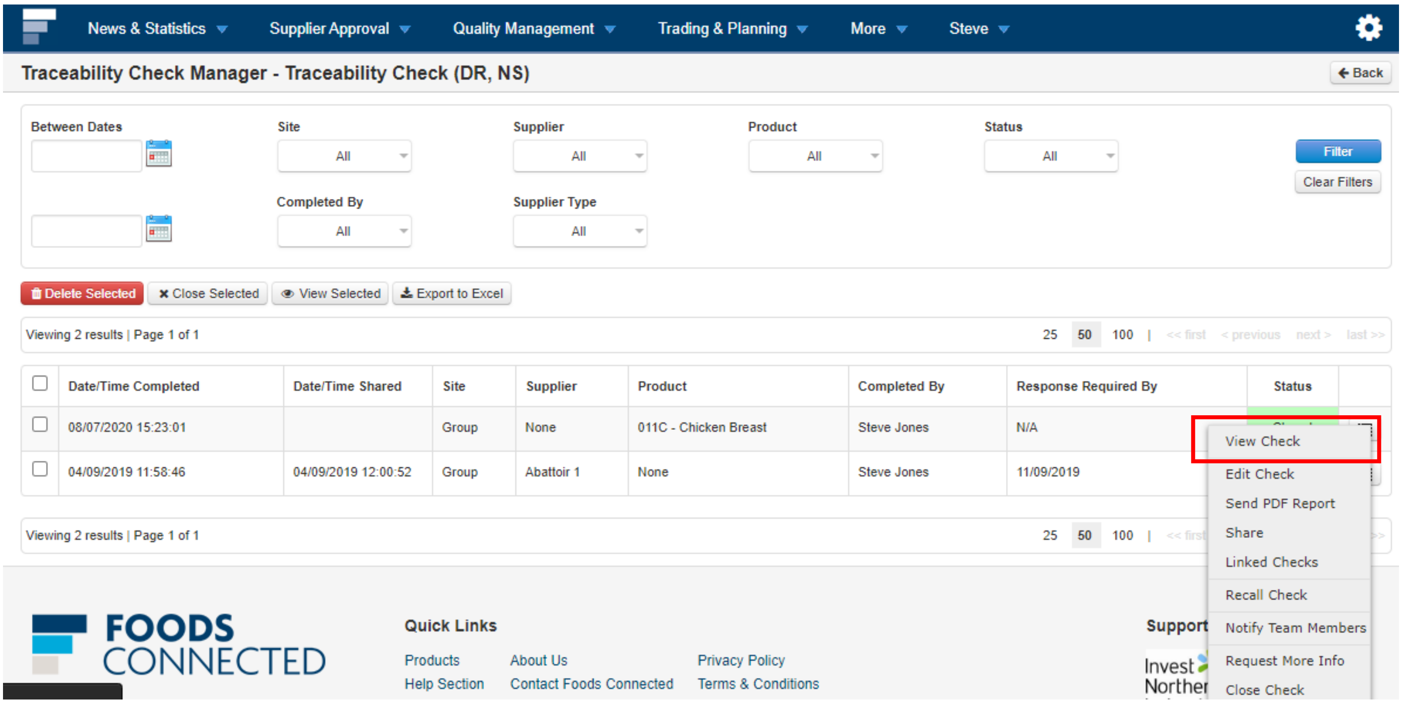
Step 1: Access Traceability manager, navigate to **Supplier Approval > Traceability Manager**



Step 2: Alongside the template which you wish to view, select **View Completed**



Step 3: Alongside the relevant check, select the **menu** button on the right-hand side of the check and select **view check.**



Step 4: If you are satisfied with the response from the supplier select **close check**. If you have a confirmation template set up you will be directed to the template for completion (See Section 4-Confirming a Traceability Template).