

TOOL USER GUIDE

WORKFLOW MANAGER



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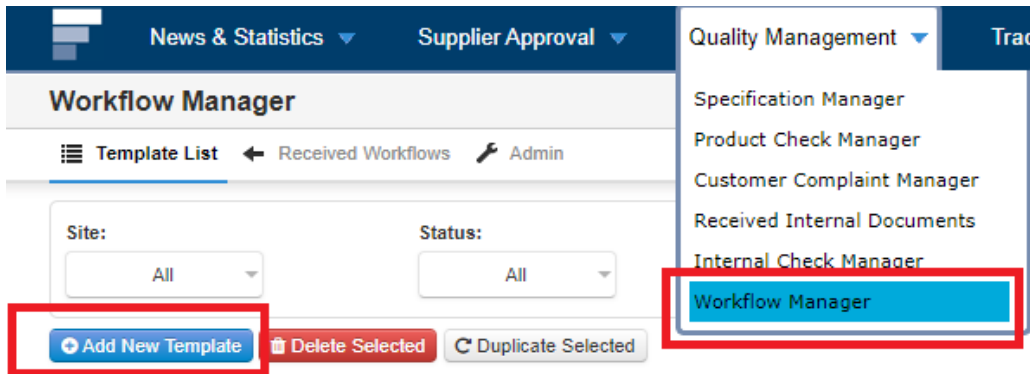
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1. CREATING A NEW TEMPLATE

Creating a template is a critical step. A template will only need to be built once and can be used for all NPD projects thereafter.

Step 1: Sign in and go to *the Workflow Manager* under the Quality Management tab

Step 2: Click 'Add new template', A new window will open where the template details can be added



1.1 ADDING TEMPLATE DETAILS

Step 1: Select which company site/sites the template will be used in

Step 2: If more than one site is selected there must be a management site and user. This user will be responsible for approving the template when complete

Step 3: Add template title

Step 4: Add template description

Step 5: Select if the product is workflow Y/N

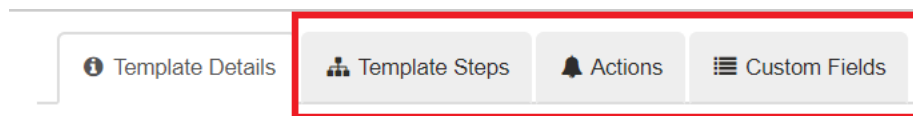
Step 6: If Yes -Select product type and sub type

If no, the option to select a product type and sub type will be unavailable. This will be for projects non product specific.

Step 7: Select which email notifications are required. The best option is to select all as these can be changed at any point

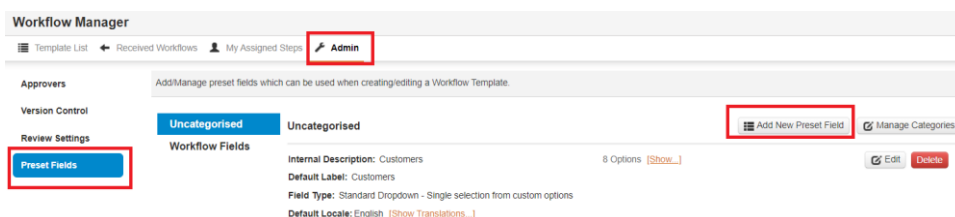
Step 8: If required a 'Completed Workflow Approver' can be added. When an NPD project has been completed this user will be required to review the project and provide one final approval.

Step 9: Save or Save & Exit. If selecting save, three new tabs will appear at the top of the screen.



1.2 ADDING PRE-SET FIELDS

Step 1: To set up 'pre-set' fields navigate to the admin tab > Pre set fields



Step 2: To add pre set fields which can then be used in the template click on 'add new pre set field'

Step 3: Add pre set field description, label, type, category (if required), then add in your field options and click add field when complete.

Add New Preset Field ✕

Internal Description

Default Label

Type

Category

Options

Default Locale

Step 4: Any pre-set fields which have been added can be edited or deleted at any time. This will auto update for any pre-set fields which have been linked to a template

Step 5: When you are adding a field to the step in the template there will then be the option to use pre-set fields when adding field type. This will populate the answers which have been created previously.

Add New Section

Section Name

Page Break After No

Expand / Collapse No

Quick Add Section Fields

Label	Type	Hide Label
test 1	Textbox - Single line text	<input type="checkbox"/>
	Site Suppliers - Meat	
	Site Suppliers - Fresh produce	
	Site Suppliers - Ingredients	
	Site Suppliers - Bakery	
	Site Suppliers - Seafood	
	Site Suppliers - Test	
	Site Suppliers - Packaging	
	Preset Fields: Customers	
	Customers	

1.3 ADDING TEMPLATE STEPS

Step 1: Select 'Add Step'

Template Details
Template Steps
Actions
Custom Fields

Add Step
Delete Step(s)
Duplicate Step(s)
Reorder Steps

Step 2: Add step name

Step 3: Add description

Step 4: Select step type – This will always be form unless linking to the product check manager.

Step 5: Add allocated hours allowed to complete and approve a step

Step 6: Select if this step is internal for the business Y/N

If no, users who are external to the business can be added to complete this step

Step 7: Select is internal approvers will be used Y/N

If no, users who are external to the business can be added to approve this step

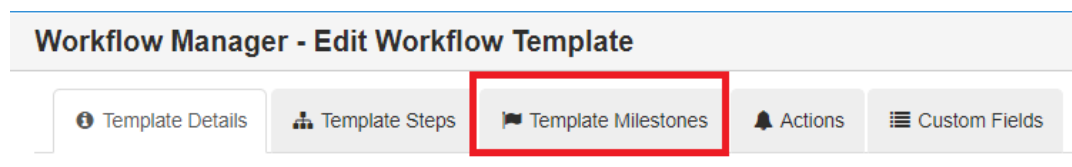
Step 8: Select approval type:

Any select user: If several users are assigned to approve a step, this option will allow any one of the users to mark it as approved

All selected users: If several users are assigned to approve a step, this option will allow mean all users must mark the step as approved to proceed

Step 9: Save

1.4 ADDING TEMPLATE MILESTONES



Step 1: To add milestones, steps must be first added to the template

Step 2: Navigate to the milestones tab and select 'add milestone'

Step 3: Add milestone name – this is mandatory A validation is included for the milestone name whereby the same name cannot be entered for more than one milestone

Step 4: Select the steps you would like included in the milestone and select save

Note: Any steps added to a milestone must follow a sequential order within a milestone: 1,2,3,4 ect... If step 1 is selected then step 5, steps 2,3 and 4 will automatically be added to the milestone also. Any steps which have been added to milestone will be disabled and unable to be added to a second milestone.

Step 5: Repeat steps 3 & 4 until you have added all required milestones.

Step 6: To edit a milestone, select the edit button on the right-hand side adjacent to the milestone name. This will reopen the modal allowing changes to be made such as

milestone name and the addition/removal of steps. In this view, milestones can also be deleted.

Note: Milestones are also placed in sequential order-based on the template steps which have been assigned to them regardless of the step name. E.g. a milestone with the first 5 steps assigned will be positioned first on the list in the workflow. The milestone with the last 3 steps assigned will be positioned last in the workflow list. The system will automatically reorder the milestones.

Step 7: To delete steps from a milestone(s) select the steps and select the delete option. A model will ask you to confirm deletion of your selected steps.

Step 8: When the template has been approved and a workflow then created the milestones will be expanded by default. The user can choose to collapse the milestone if they wish.

Step 9: Any steps which have not been added to a milestone will be displayed in a standalone format.

Step 10: When any step within a milestone has been started the date which the milestone has been started is detailed in the header. When all steps within the milestone have been completed the completion date for the milestone will also be added to the header.

Step 11: A progress bar has also been added which updates in green each time a step within the milestone has been completed informing the user of the milestone progress

▼ Milestone two (3 Steps)		Started: 22/09/2021 In Progress <input type="text"/>							
<input type="checkbox"/>	Step Name	Expected Start Date	Expected End Date	Actual Start	Actual Complete	Assigned User(s)	Status		
<input type="checkbox"/>	Scoping - Gale 1 Meeting	*	22/09/2021 09:00:00	30/09/2021 09:00:00	22/09/2021 10:00:52	29/09/2021 11:00:52 <i>(Expected)</i>	1 Completer(s) 0 Approver(s)	In Progress	View Override
<input type="checkbox"/>	Brand Scoping Meeting	*	06/10/2021 09:00:00	14/10/2021 09:00:00	Not started	Not started	1 Completer(s) 0 Approver(s)	Not Started	View Override
<input type="checkbox"/>	Scoping with Co-Manufacturer	*	29/09/2021 09:00:00	07/10/2021 09:00:00	Not started	Not started	1 Completer(s) 0 Approver(s)	Not Started	View Override

1.5 DUPLICATING & REORDERING STEPS

Step 1: Select the check box on the left hand of the page for the steps you would like to duplicate

Step 2: Click on the duplicate icon at the top of the page, this will duplicate all the selected step's moving them to the bottom of the page

Step 3: To reorder the position of the steps select the reorder icon at the top of the page

Step 4: Arrows will appear on the left-hand side. Click on the arrow to drag and reposition the steps

1.6 ADDING CUSTOM FIELDS


Up to 3 custom fields can be added if required, these are added when creating the template.

Step 1: Click on the custom fields tab at the top of the page


Step 2: Select Add field, which will open a new dialogue box

Step 3: Enter the custom field name – this is what will be displayed in the workflow list

Step 4: Select the fields type (this will be the way the field name is answered), drop down, text fields or a prepopulated supplier drop down. There is also an option for a project code. This will give the workflow a unique code starting at 1000 and increasing in increments of one.

Step 4.1: If selecting drop down, the drop downs will need to be added by selecting the edit options button which appears:  up to 5 drop downs can be added

Step 5: Show in list Y/N. Typically yes, however if selecting No the custom fields will not appear in the workflow project list view as shown below

<input type="checkbox"/>	Title	Version	Creation Date	Completion Date	Launch Date	Created By	Product	Current Step	Example Custom Field	Status	
<input type="checkbox"/>	Pork Steak	1.0	25/06/2020 16:19:41	13/08/2020 16:19:41 <i>Anticipated</i>		Claire McCrory	000257-0 - Example Product	Strategy - Set Up Due: 02/07/2020	Detail shown here	In Progress	

Step 6: To amend the custom field select the edit button on the left-hand side 

Step 7: Delete any custom fields by select the field and clicking on the red delete icon

Step 8: Custom fields can be turned on or off any at stage using the toggle on/off option

Dropdown option – You can build in pre-defined options for the user to select from when generating a workflow.

Pre-populated dropdown (suppliers) – This option will display a list of the company suppliers, only one supplier can be selected from the list.

Text – This will allow the user to enter their own info using a blank text field

Project Code – This option will assign the workflow with a unique product code which starts at 1000 and increases in increments of 1 for any new workflows created.

1.7 ADDING STEP PREREQUISITES

Step Name	Step Type	Duration	Prerequisites	Approvers	Completers	Notifications
Innovation	Data Form	Completion: 40.00 hour(s) Approval: 8.00 hour(s)	All available steps assigned	Group: 1	Group: 1	Completion Required Approval Required Completion Overdue Approval Overdue Step Rejected
Gate 1	Data Form	Completion: 40.00 hour(s) Approval: 40.00 hour(s)	Innovation (Completed) All available steps assigned	Group: 0	Group: 1	Completion Required Completion Overdue

Step 1: A prerequisite can only be added from step 2 and thereafter

Step 2: Add a prerequisite by selecting on the + icon

Step 3: More than one prerequisite can be added to a step

Step 4: Decide if the steps with the prerequisite require approval from a user

Step 5: If there are several steps assigned to a prerequisite, all these steps will move to in progress when the dependant step has been completed/approve. Each step status will change to in progress and the countdown for completion will begin

Step Name	Started	Completed	Assigned User(s)	Status
Prerequisite	16/07/2020 18:58:55	16/07/2020 18:59:29	1 Completer(s)	Completed & Approved
Parallel 1	16/07/2020 18:59:29	20/07/2020 09:00:00 (Expected)	1 Completer(s)	In Progress
Parallel 2	16/07/2020 18:59:29	20/07/2020 09:00:00 (Expected)	1 Completer(s)	In Progress
Parallel 3	16/07/2020 18:59:29	20/07/2020 09:00:00 (Expected)	1 Completer(s)	In Progress

1.8 ADDING STEP COMPLETERS/APPROVERS

Step 1: Click on the site name to add step completers/approvers. The number will always be set to zero as default

Step 2: A list will appear showing the users assigned for that site

Step 3: Select all relevant users who are required complete/approve the step. The number beside the site will then update to reflect the number of users who have been assigned

Step 4: A primary user will receive an email notification, whereas a secondary user will not receive an email notification (this function will only work if notifications have been set up)

Step 5: If no completer or approver has been assigned when creating a template, they can also be added when creating a new workflow, this can be done on an ad hoc basis by the workflow creator and also any admin user.

1.9 SETTING UP EMAIL NOTIFICATIONS

Step 1: To turn on/off the email notification click on any of the listed notifications


Step 2: A new window will open where the email notifications can be turned on or off

Step 3: The number of assigned notifications will then update in the list view

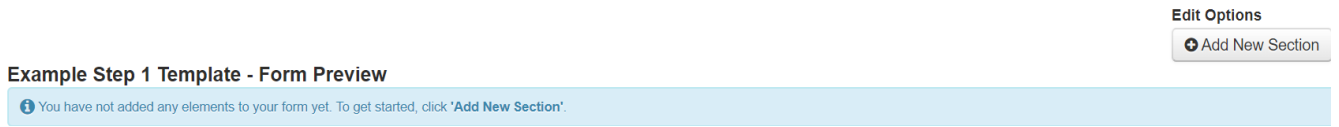
- Notifications
- [Completion Required](#)
- [Approval Required](#)
- [Completion Overdue](#)
- [Approval Overdue](#)
- [Step Rejected](#)
- [More Info Requested](#)

1.10 STEP FORM BUILDING

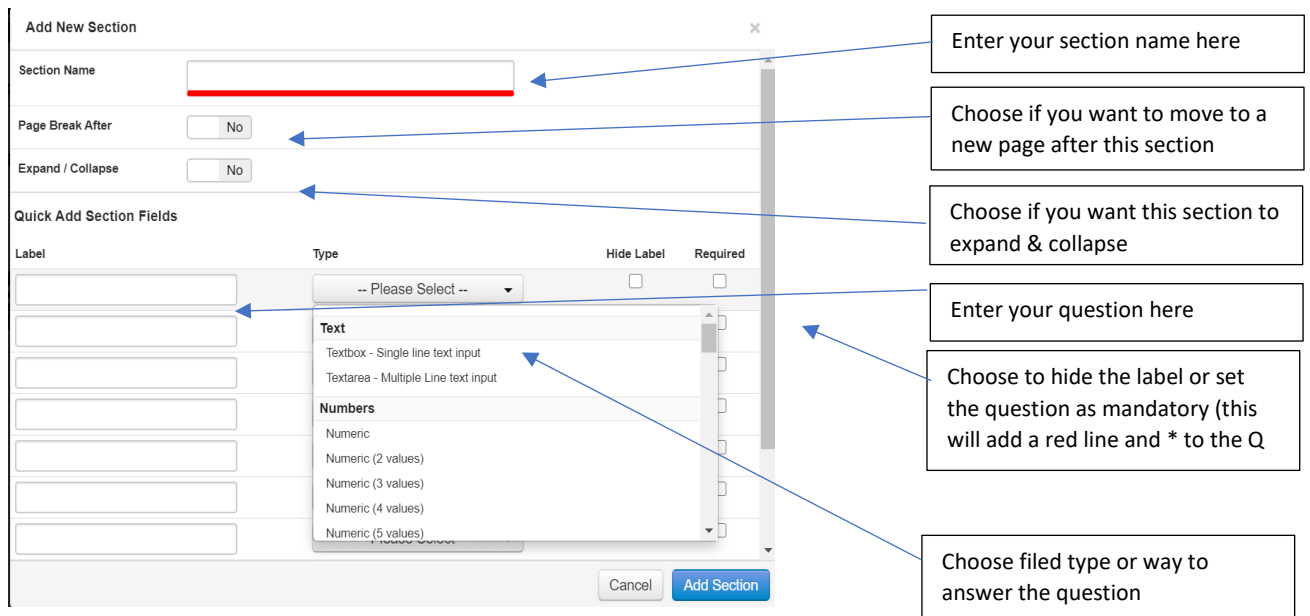
The form will determine the questions you want to ask for each step and how you want it answered using different field types

Step Name	Step Type	Duration	Prerequisites	Approvers	Completers	Notifications
Example Step 1	 Data Form	Completion: 8.00 hour(s) Approval: 8.00 hour(s)	All available steps assigned	Group: 0	Group: 0	<ul style="list-style-type: none"> Completion Required Approval Required Completion Overdue Approval Overdue Step Rejected

Step 1: Select edit & edit form on the right-hand side of the page. This will open a new window where you will build your form for that step to suit your needs



Step 2: Select 'Add New Section'



Add all step questions then select add section. The section will be displayed as per below:



There are various field types available, these are explained in the appendix section.

Step 3: To add more questions to a section select the plus icon and repeat the above steps



Step 4: When adding a second section additional options will be available

Add New Section	
Section Name	<input type="text" value="Example Section 2"/>
Parent Section	<input type="text" value="None"/>
Place After	<input type="text" value="None"/>

Choose if the new section has a parent section. If yes it will be a sub section

Choose what position on the page you would like to place the section

Notice how the second sub section is displayed below, it has been set up that Example section 1 is the parent section

Example Step 1 Template - Form Preview

<input type="checkbox"/> Example Section 1
<input type="checkbox"/> Question 1 *
<input type="checkbox"/> Example Section 2
<input type="checkbox"/> Question 3 *

Example Section1 is the 'Parent Section', the text is larger, and the grey banner is slightly darker. Example section 2 has now become a sub section, the text is smaller, and the grey banner is lighter in colour.

1.11 ADDING CONDITION BASED SECTIONS OR FIELDS (COMPATIBLE WITH THE APP ONLY)

This will determine if the section or fields is visible conditionally based on the answer to another question

Step 1: Select if the question is required/visible based on the answer to another question

Step 2: A new conditions section will appear. Click on the link to manage the conditions

Field	<input type="text" value="Example Section 1 - Question 1"/>
Field Option	<input type="text" value="Yes"/>
Determines if Field is Required	<input type="text" value="-- Please Select --"/>
Determines if Field is Visible	<input type="text" value="-- Please Select --"/>

Choose the question which will trigger the condition

Choose the answer that will trigger the condition

Select Y/N to the condition-based field being required/visible

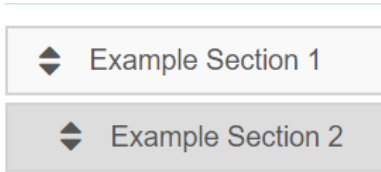
1.12 REORDERING SECTIONS AND OR FIELDS

Step 1: At the top of the page select the 'reorder' icon

Step 2: Choose if you would like to reorder the sections or the fields

Step 3: Click on the arrow icons to reposition the sections or fields to the new preferred location

Step 4: Click done when complete



1.13 DUPLICATING SECTIONS AND OR FIELDS

Step 1: Choose the relevant section and select the duplicate icon 

Step 2: Choose if you would like to duplicate the section with the fields or duplicate fields only

Step 3: If duplicating a section with fields a new window will open – add a new section name. The remaining questions will be the same as adding any new section

Duplicate Section - Example Section 1

Duplicate Section Name

Parent Section

Place After

Page Break After No

Expand / Collapse No

Visible Always Condition Based (conditions will be inherited)

Fields to Copy All Select Individually

Duplicate Field Conditions Yes

Step 4: If duplicating fields only a new window will open

Step 5: Select the section you would like to copy the fields from

Step 6: Select all fields or choose the fields you require individually

Step 7: If a condition has been assigned to a step these can also be duplicated

Step 8: Select create duplicates

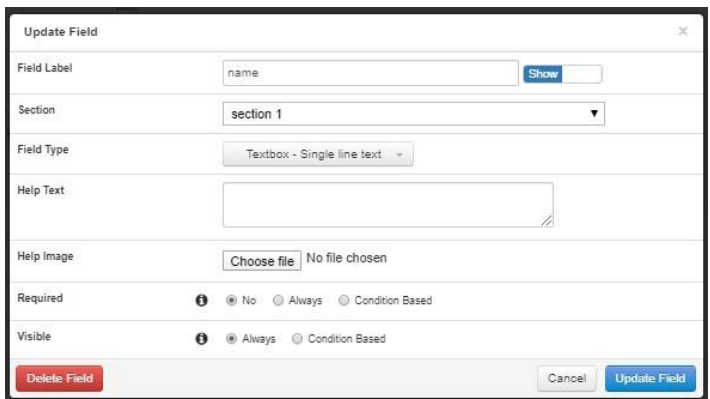
1.14 EDITING SECTION/FIELD DETAIL

Step 1: Click on the edit icon to edit or delete a section or field 

Step 2: A new dialogue box will open allowing any of the information to be amended

Step 3: Help text or a help image can be added. This will appear next to the question as an info icon. By hovering over the icon will display the help text/image

Step 4: To delete a section or a field click on the red delete button on the bottom left of the screen



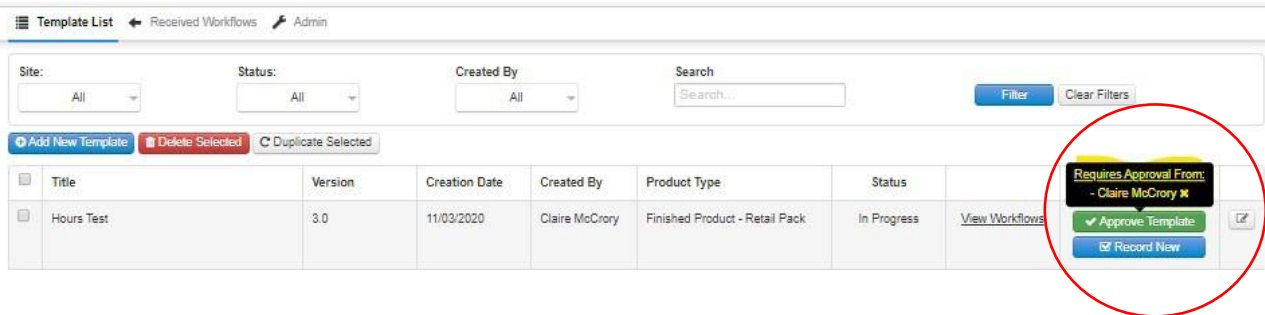
2. APPROVING A TEMPLATE

When all details have been added to the template and all forms are complete, the template is now ready for approval.

Step 1: In the template list, a green icon will be displayed, asking the assigned user to approve the template.

Step 2: Only the user or users who have been assigned as the template approver will have the ability to do so.

Step 3: Once the template has been approved, it will become locked and no further editing can be done



2.1 EDITING AN APPROVED TEMPLATE

Step 1: If further editing or amends are required a new version can be created. Amends will only impact workflow's from that point forward, it will not change any of the workflows created previously.

Step 2: Click on the edit icon 

Step 3: A red ribbon will be visible, click on the 'create new version' to reopen

Step 4: The template will now be ready to edit. The version number will increase from 1 to 2 etc...

Step 5: When all amends have been made follow the steps above to approve the template for use

Step 6: If the most recent template has NOT been approved, the system will always use the last approved version



2.2 USING TEMPLATE FILTERS

Step 1: In the temple list view there are a range of filters available

Step 2: Use the filters or the free text search to quickly find the filter being worked on

2.3 DUPLICATING A TEMPLATE

Step 1: Select the template or templates to be duplicated

Step 2: Click on the 'duplicate

2.4 VIEWING/REVERTING TO A PREVIOUS TEMPLATE VERSION

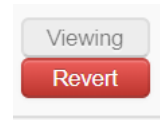
Step 1: To view a previous version of a template open the template and click on the



Step 2: Click on the view button of the template you would like to view, this will open in a new window.

Step 3: If you wish to revert to a previous version you must first click on create a new version.

Step 4: A red revert icon will appear on the most recent version.



Step 5: Click on revert and provide a reason.

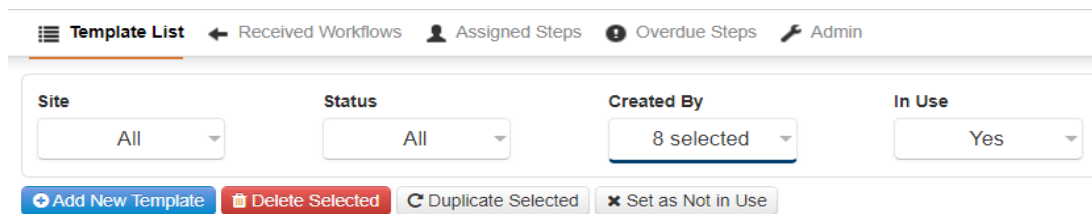
Step 6: Templates can only be reverted on a template by template basis

Step 7: When a template has been reverted, the previous version will be **permanently deleted**.

2.5 SETTING A TEMPLATE TO NOT IN USE

Step 1: A template can be set to 'not in use' if it is not currently required, without having to delete.

Step 2: There will be filters available to search for all templates which have been set to not in use.



3. GENERATING A NEW PROJECT WORKFLOW

3.1 GENERATING A NEW PROJECT

Step 1: In the template list select the template relevant to the new product or project

Step 2: Select 'record new' or if viewing workflows select 'generate from template', a new dialogue will open

Workflow Manager

Template List ← Received Workflows Admin

Site: All Status: All Created By: All Search: Search... Filter Clear Filters

+ Add New Template - Delete Selected Duplicate Selected

Title	Version	Creation Date	Created By	Product Type	Status		
Project Template Two	5.0	11/03/2020	Claire McCrory	Finished Product - Retail Pack	Approved	View Workflows	Record New
Project Template One	4.0	11/03/2020	Claire McCrory	Finished Product - Retail Pack	Approved	View Workflows	Record New

Step 3: Add all the new product information

Step 3.1: Name, description, select relevant site, enter start date or launch date and fill in customer fields if added.

Step 3.2: Product Source: existing product, new product, or temporary product

Existing product – add the product name or code and click on magnifying glass

This will navigate to the company product file. Choose the relevant product.

Adding a new product code. There are 2 options when choosing a new product code.

Option 1 – Add new product code and new product name. Click on generate. The new

Product Source: Select Existing Product

Select Product: Search for product by name or product code

Start typing to search your product file for the product by Product Name or Code.

product code will save in Company Product File.

Option 2 - A

Product Source: Add New Product

Add New Product

Product Code: Enter Product Code

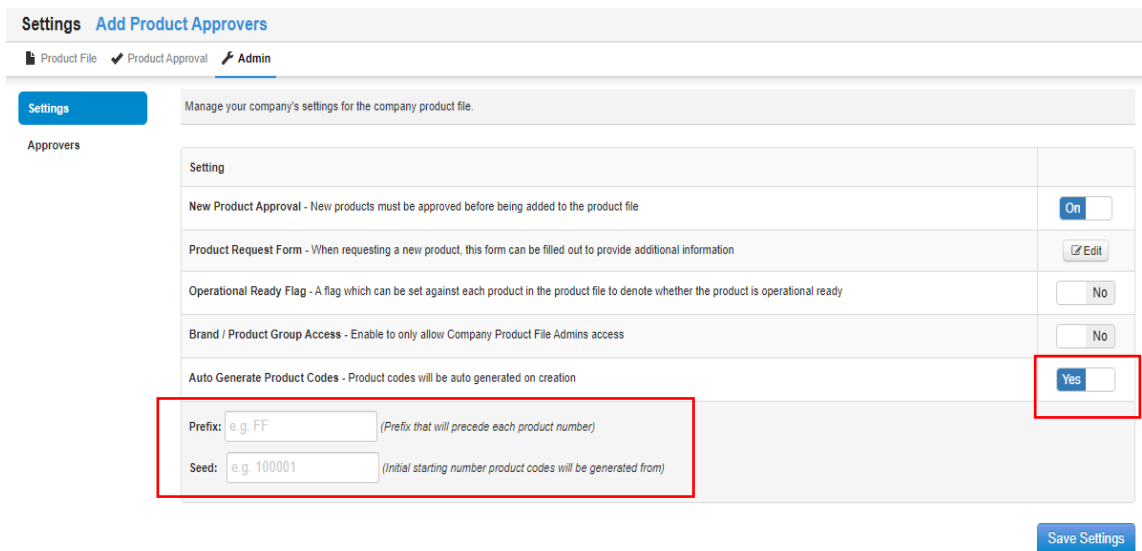
Product Name: Enter Product Name

ettings it

is possible to set a prefix as well as numerical sequence.

Click on Settings  . Click on Company Product File. 

Click on Admin. Auto generate product codes can be toggled Yes if required or No if not. Add the preferred prefix and number sequence. The prefix will be applied to all workflows. The product number will auto generate sequentially for each new workflow



Settings Add Product Approvers

Product File Product Approval Admin

Settings Manage your company's settings for the company product file.

Approvers

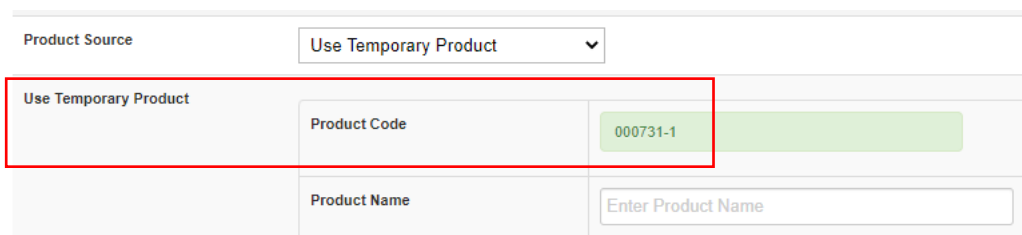
Setting	
New Product Approval - New products must be approved before being added to the product file	<input checked="" type="checkbox"/> On
Product Request Form - When requesting a new product, this form can be filled out to provide additional information	<input type="checkbox"/> Edit
Operational Ready Flag - A flag which can be set against each product in the product file to denote whether the product is operational ready	<input type="checkbox"/> No
Brand / Product Group Access - Enable to only allow Company Product File Admins access	<input type="checkbox"/> No
Auto Generate Product Codes - Product codes will be auto generated on creation	<input checked="" type="checkbox"/> Yes

Prefix: (Prefix that will precede each product number)

Seed: (Initial starting number product codes will be generated from)

Save Settings

Temporary codes. Automatic temporary codes can be added, these are system generated in sequential order. Temporary product codes will be saved in the Company Product File. These can be changed at a later stage of the workflow.



Product Source Use Temporary Product

Use Temporary Product	Product Code	Product Name
	000731-1	Enter Product Name

Step 4: There is the ability to exclude steps from the workflow which may not be required for completion in a particular project.

Step 5: These excluded steps will still be displayed in the workflow list, however they will be greyed out and their completion approval times will be excluded from the critical path timings.

3.2 WORKFLOW START DATE/LAUNCH DATE ADDITION

Step 1: When generating a new workflow a user will now have the option to enter either the workflow start date or the workflow launch date.

Step 2: They can select what option should take precedence when generating the workflow

Step 3: **If using workflow start date:**

Step 3.1: Select the workflow start date, this can also be a date in the past.

Step 3.2: The system will calculate the associated hrs for completion/approval for each step and provide the user with the expected step start date and expected end date.

Step 3.3: When the start date arrives the notification emails will be sent, if the start date is in the past the emails will be sent at the point of workflow generation to the step completers and the first step will move to in progress.

Step 3.4: If there are no prerequisites set up, the emails will detail all the steps which have an action required and all the steps will move to in in progress.

Step 4: **If using workflow launch date:**

Step 4.1: The system will work from the final step in the workflow backwards to the first step.

Step 4.2: The expected completion date for the last step will be the launch date.

Step 4.3: The system will calculate the associated hrs for completion/approval for each step and provide the user with the expected step start date and expected end date.

Step 4.4: Based on the timings set up in the template the user will have visibility of the expected start date of the first step, when this date arrives, emails will be sent to the step completers.

Step 4.5: If there are no prerequisites set up, the emails will detail all the steps which have an action required.

Step 4.6: If the launch date is set and the first step of the workflow is in the past, the emails will be sent at the point of workflow generation and the first step will move to in progress.

Step 4.7: If there are no prerequisites set up, the emails will detail all the steps which have an action required and all the steps will move to in progress.

Step 5: Addition of a toggle to hide/show the expected start/end dates of each step, above the steps table in a workflow. Option is stored on the user level, so if you selected 'Show Expected Start/End Dates', they will always show until you choose to hide them.

Step 6: If a workflow is paused then resumed and new dates entered these will also update the dates for each step as expected.

Step 7: If the expected start date is in the future the assigned step completer does have the option to start the step earlier than expected start dates if required. From this point the workflow would continue based on the revised timelines.

3.3 EDITING A PROJECT WORKFLOW

Step 1: When several workflow projects have been created using an approved template, they will be displayed as per below

<input type="button" value="Generate From Template"/> <input type="button" value="Delete Selected"/> <input type="button" value="Set as Not in Use"/> <input type="button" value="Duplicate Selected"/>												
<input type="checkbox"/>	Site	Title	Version	Creation Date	Completion Date	Launch Date	Created By	Product	Current Step	test	Status	
<input type="checkbox"/>	Group	Example Product 2	1.0	19/08/2020 16:40:09	07/10/2020 16:40:09 <i>Anticipated</i>	30/08/2020	Claire McCrory	000047-2 - Test Product	Strategy - Set Up Due: 26/08/2020		In Progress <div style="width: 50%;"></div>	<input type="button" value="Load"/>
<input type="checkbox"/>	Group	Example Product 1	1.0	19/08/2020 16:39:23	07/10/2020 16:39:23 <i>Anticipated</i>	03/08/2021	Claire McCrory	000047-1 - Example Product	Strategy - Research Due: 16/09/2020		In Progress <div style="width: 20%;"></div>	<input type="button" value="Load"/>

Step 2: Projects which are no longer live can be archived. Select the project and click on 'set as not in use'. This will hide the project from view. There is an additional filter option for this called 'In use'. By selecting no, it will display all the projects which have been archived. This can be done by the user who created the workflow and also admin users.

Step 3: Workflows which are no longer required can be completely deleted. Creators of the workflow can delete their own workflow only, admin users will have the ability to delete any workflow regardless or creator.

Step 4: The site detail has been added on the left-hand side and a filter option for site is also available at the top of the page. This will display the site detail which this template

is being used at.

Step 5: If the launch date is red this will indicate that the launch date is sooner than the project completion date.

Step 6: If the current step is green this will indicate the project is on track, if this is red it will highlight the step and potentially the project is running overdue.

Step 7: There is a status bar giving a project progress update. Hovering on this icon will inform the user of how many steps there are in the project and how many have been completed to date.

Step 8: Selecting the 'load' button will open that project.

Step 9: The edit details option will allow the user to change the project name, launch date, description and custom fields answers if required.

Step 10: The edit product option will allow the user to amend the raw material of finished product name (this will be stored in the company product file)

The screenshot displays a project management interface. At the top, there are tabs for 'Workflow Details' and 'Workflow Notes'. Below this is a form with fields for 'Title' (test (Version 1.0)), 'Product' (001414-0 - test), 'Created By' (Claire McCrory), 'Site' (Group), 'Date Created' (19/11/2021 11:01:12), 'Status' (In Progress), 'Start Date' (19/11/2021 11:01:12), and 'Duration' (Days Taken: 10, Expected Days to Complete: 12). On the right side of the form, there are two buttons: 'Edit Details' and 'Edit Product', both of which are highlighted with a red rectangular box. Below the form is a 'Pause Workflow' button. Underneath, there is a 'Steps' section with tabs for 'View Selected Steps', 'Show Your Steps', and 'Hide Expected Start/End Dates'. A 'Gantt Chart' icon is also visible. The main table shows a milestone named 'milestone one' with 2 steps. The first step is '1) Scoping - Gate 1 Meeting', which is marked with an asterisk. The table columns include Step Name, Expected Start Date, Expected End Date, Actual Start, Actual Complete, Assigned User(s), and Status. The status for this step is 'In Progress'. There are also 'View' and 'Override' buttons for this step.

Step Name	Expected Start Date	Expected End Date	Actual Start	Actual Complete	Assigned User(s)	Status
1) Scoping - Gate 1 Meeting	19/11/2021 09:00:00	26/11/2021 17:00:00	19/11/2021 11:01:12	29/11/2021 11:01:12 (Expected)	1 Completer(s) 0 Approver(s)	In Progress

Step 11: In the lower half of the screen the project steps are listed

It details if a step has been started/completed with dates provided

It details the assigned step completer and approver. The black asterisk informs the user their action is required on a step:



A status bar displays if a step is not started, in progress, completed or requires review

The first 'edit' button will always be available, however if a prerequisite is setup for the following steps, they will not be available to load until the step prior has been completed.

By hovering over the edit button will inform the user of what steps must first be completed before starting

Selecting 'show your steps' will condense the user view showing the steps which they have been assigned to only.

Selecting all or some of the steps and clicking 'view selected steps will create a PDF detailing all the information captured in each step.

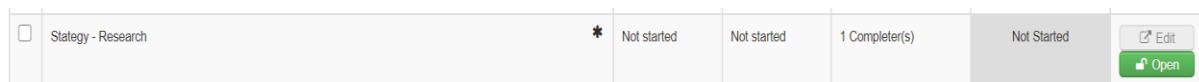
Step 12: To open a step which has been locked for editing due to a prerequisite (a padlock will be displayed), to open or skip any step in the workflow or to reassign step completers and approvers at any time (irrespective of prerequisites) can be done by the workflow creator and admin user – follow the steps below:

An open icon will be available to this user.

To open the step early click on the green icon and a new model will open.

A reason must be given for opening the step early or skipping the step

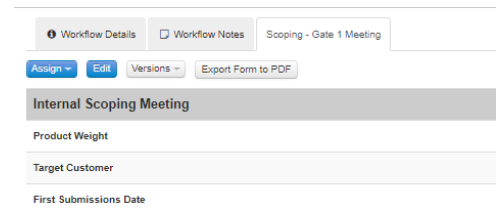
The step will then move to in progress or skipped and all emails is set up will work as expected



Step 13: Select the edit button. This will open the step in a new tab

Step 14: The assigned user will have a blue edit button; they must select this to open the form to add information

Step 15: The blue assign button will only be available to the user who created the project or the admin user. Only that user will have to option to add new completers & approvers at any time throughout the workflow



Step 16: When some or all the data has been entered select save/exit/complete

Step 17: To return to the step list select the workflow details tab at the top of the page

Step 18: A red close icon will be available to close the step tab

Step 19: Complete the above actions until all the steps in the project have been completed

Step 20: When the project is complete a red banner will appear at the top of the screen and the project can no longer be edited

Step 21: If a completed workflow approved was added when creating the NPD template, this user must then review the completed project and give the final approval

	Title	Version	Creation Date	Launch Date	Created By	Product	Current Step	Status
<input type="checkbox"/>	Sirioin Joint	1.0	10/02/2020 10:34:41	23/12/2020	Hilton Admin	00001 - Sirioin Joint		Approval Required <input type="checkbox"/> Edit <input type="checkbox"/> Approve <input checked="" type="checkbox"/>

3.4 AMENDING STEP COMPLETERS/APPROVERS OR DATES IN A WORKFLOW

Step 1: Select the step or steps where you would like to make an update

Step 1: Select the **assign** option in the steps section

Step 3: Then if you would like to update step completers, approvers or expected completion dates of a step.

Step 4: If choosing completers/approvers a new model will open and you can remove currently assigned users and add new users

Step 5: If changing the expected dates, a new model will option where you can amend the expected start date & time and expected end date and time of a step.

3.5 APPROVING/REJECTING A STEP

Step 1: If a step required approval the status bar will update

Step 2: The assigned step approver will receive an email notification at this point to inform them their action is required

Step 3: They will be required to load the step, review the data entered and either approve or reject

Step Name	Started	Completed	Assigned User(s)	Status
Product Brief	* 12/03/2020 11:05:39	13/03/2020 12:05:39 (Expected)	Claire McCrory	Requires Approval

Step 4: Once the step has been approved the next step will then be available to load and complete (is a prerequisite has been assigned)

Step 5: Each step must be completed by the assigned completer and approved (if required) by the assigned approver to complete the full project workflow

Step 6: If a step is being rejected a reason is mandatory and must be provided. This detail will be logged in the activity log.

Step 7: If the step approver needs more information in order to approve, they step, they have the option to request more information from another user within their company.

Step 8: Select 'Request More Info' at the approval stage, select the user from the drop down list who they would like to consult with, give a response date (non mandatory), and provide a message detailing the extra information required.

Step 9: An email will be issued to the above-mentioned user if the email notifications have been turned on for 'request more info'. A task will also be added to their task list on the home page.

Step 10: When the responding use is viewing the step they will see a 'Respond' button, which when select will open a text box enabling then to add their feedback in response to the more info request,

Step 11: When step 10 has been completed, the step approver will receive a notification to inform them the response has now been provided. The response will be stored in the activity log and in the notes section.

3.6 CREATING A NEW VERSION OF A STEP

Creating a new version of the form can be useful in instances such as several factory trial's.

Step 1: Edit the step and select the version button and 'new version'. This will copy all the detail in the form creating a new version allowing changes to be made

Step 2: A full version history will be available

Step 3: The most recent version will always be visible

Step 4: If there are pre requisites associated with this step they will also reopen and will require reapproval.

Step 5: When viewing the reopened steps a reconfirm button will now be available.

3.7 EXPORTING A FORM TO PDF OR EXCEL

Step 1: Edit the step and select the 'export form' option and choose if you want to export to PDF or excel, a new window will open and you can select your various options

Step 2: Select if a header is required

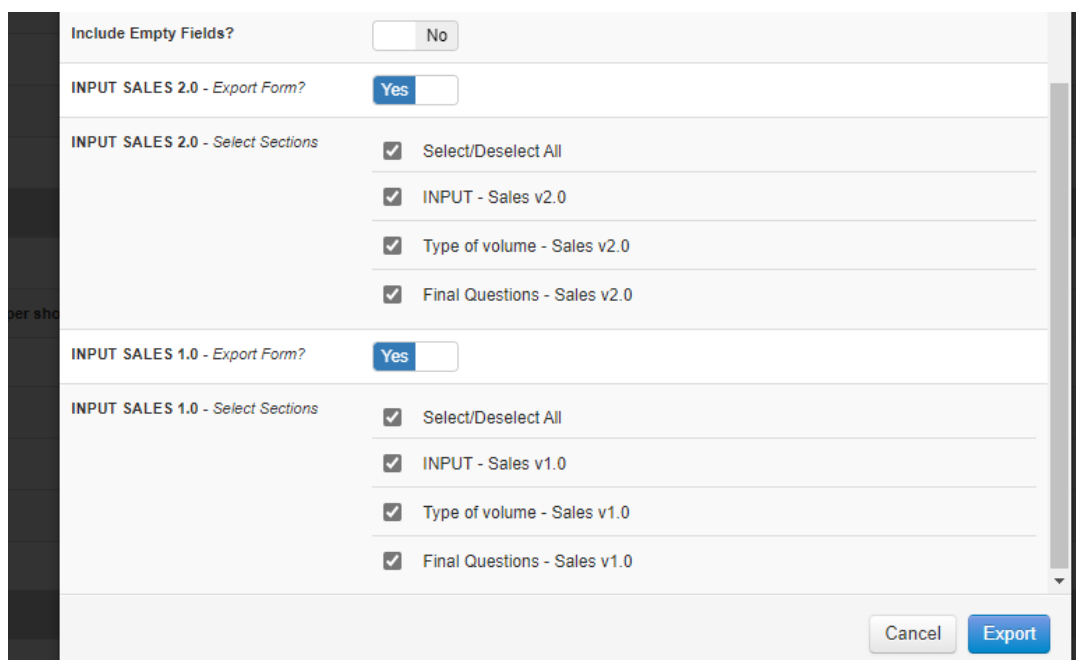
Step 3: Include company logo (a logo can only be added if a header is added)

Step 4: Include empty fields

Step 5: Export the full form, if no you can select the specific sections required for the export

Step 6: The form will export in either PDF/excel format which can then be saved for further editing.

Step 7: If there is more than one version of the step and choosing to export there will be an option to export all the versions – this will be identifiable by V1/V2/V3 in the section heading. See image below:



3.8 ADDING WORKFLOW NOTES

Workflow notes can be added at any time. Workflow notes are located at the top of the page in a separate tab

Step 1: Notes can be added for the overall project or for an individual step

Step 2: The notes will be saved and can be added to any step which has been exported to PDF

Step 3: When adding a note there is also the ability to notify users of the new note. Several users/teams can be selected if they are involved in the workflow project. The user(s) will receive an email notification with the note also detailed in the body of the email.

Step 4: There is also the option to attach a file when adding a note. All files attached will be visible and can be opened in the notes tab. If a note and attachment is added for a specific step this will also be available to view in the notes tab and at the bottom of the actual step in the notes section.

The 'Add Note' dialog box contains the following elements:

- Step:** A dropdown menu currently showing 'Overall'.
- Attach File:** A 'Choose file' button followed by the text 'No file chosen'.
- Note Text:** A large, empty text area for entering the note content.
- Notify Users:** A search bar with the placeholder text 'Search By Username/Site Name...'. Below it is a 'Select / Deselect All' checkbox, a list of users starting with '-- Users --', and a checkbox next to the name 'Claire McCrory'.
- Buttons:** 'Cancel' and 'Add Note' buttons at the bottom right.

Step 5: When a note has been added and a user notified by using the 'view details' icon a modal will open and display who added the note, the date and time stamp, the note itself and a list of all the users who have been notified.

Date	Step	User	Note Text	
07/07/2021 14:24:45	Overall	Claire McCrory	FTP Pushed back by two weeks	View Details

3.9 PAUSING A WORKFLOW

Step 1: Select the pause icon and provide a reason

Step 2: The project status will be updated to paused

Step 3: To resume the project, select the resume icon and provide a resume reason and a new launch date

3.10 DUPLICATING A WORKFLOW

Step 1: Select the workflow(s) you would like to duplicate and select the 'duplicate workflow' icon at the top of the page

Step 2: This will create a copy of the workflow and all of the information, including step versions, notes and custom fields will be copied across

Step 3: The workflow title will have 'copy' suffixed to the end; this can be changed by editing the workflow details

	Title	Version	Creation Date	Completion Date	Created By	Product	Current Step	test	Status	
<input checked="" type="checkbox"/>	Pork Loin Steaks	1.0	17/07/2020 13:01:35	21/08/2020 13:01:35 <i>Anticipated</i>	Claire McCrory	000292-1 - NEW NPD PRODUCT	Strategy - Set Up Due: 24/07/2020		In Progress	<input type="button" value="Load"/>

3.11 GANTT CHARTS

Step 1: To view click on the Gantt chart option

Step 2: The Gantt chart will show timeline of the project

Step 3: The yellow colour highlights today's date and the blue the weekends and if a launch date is added this will be red.

Step 4: When a step has been completed it will be coloured green, red when overdue and blue when in progress.

Step 5: The launch date (if added) this will be detailed at the top of the page.

Step 6: Gantt charts can also be exported to PDF by selecting the logo on top right of the page.

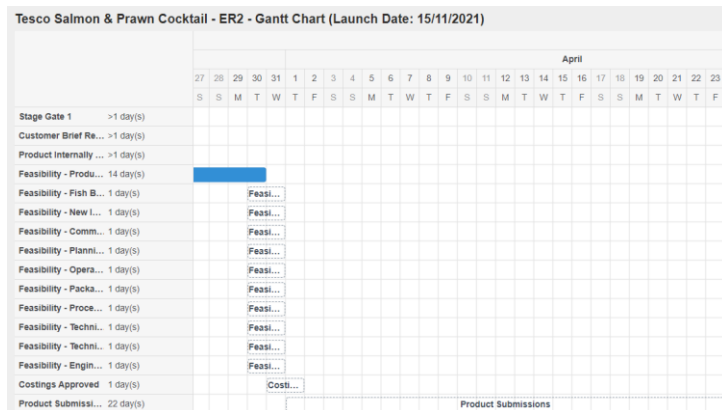
Step 7: The step name on the right-hand side will have associated duration for the completion window

Step 8: By clicking on the step name in the model will open a model with details the step completers and approvers.

Product Submissions

Completers:
 Mathew Wheatley
 Lily Dicker
 Sally O'Brien

Approvers:
 Sally O'Brien



3.12 POST LAUNCH REVIEW

To add a post launch review step into the individual workflow, follow these steps:

❖Note; The post launch review will only work if a **launch date** has been assigned to a workflow.

Step 1: When in the template click on the actions tab, select add action, then choose 'post launch review' from the drop-down list

Step 2: Then build the post lunch review form you would like the user to fill out by clicking on the pencil icon.

Step 3: Build the form as you would build any foods connected form by adding sections and fields. Linked fields can also be used to populate the post launch review form with information captured in the workflow steps before the post launch review is due.

Step 4: Create your workflow as normal

Step 5: Load the workflow and click on the review settings tab

Workflow Details Workflow Notes Review Settings

Settings for post-launch workflow reviews.

Review Interval Days

Post-Launch Reviewer Workflow Creator

Step 6: In here you can set the review interval for the workflow and assign who gets notified to complete the post launch review

Step 7: When workflow reaches status “Pending Review”, an email will be sent to the selected user to review the form. A link will also be added to the assigned users task list which when clicked will open the form to be completed.

Title	Version	Creation Date	Completion Date	Launch Date	Created By	Product	Current Step	Custom Field Example 1	Status
Post Launch Review Test	2.0	22/01/2021 14:58:39	22/01/2021 14:58:59	18/01/2021	Claire McCrory	00001 - Demo Product 3			Reviewed

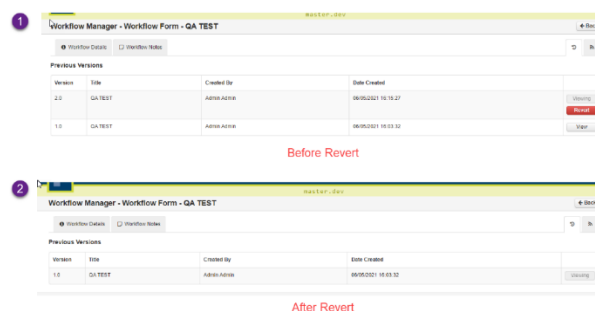
3.13 REVERTING A VERSION OF THE WORKFLOW

Step 1: The creator of the workflow now can revert the workflow version in increments of 1, e.g. V5 to V4 to V3.... If there is more than one version of the workflow

Step 2: Choose the workflow which you would like to revert a version and click on load.

Step 3: Click on the version option on the top right-hand side of the screen (click with an anti-clockwise arrow).

Step 4: At the top of the list will display the current version currently being worked on. A red revert button will be available adjacent to this version and only this version



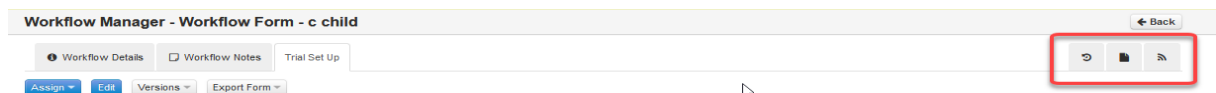
Step 5: By clicking on the revert option, it will open a model informing you the current version will be reverting to the previous version, a reason must be provided:

Step 6: Once the action has been completed the previous version will be permanently deleted, all data and tasks associated with the previous version will also be deleted.

Step 7: Any new versions made after this point will move up in an increment of 1, e.g. V1 > V2 > V3.

3.14 VIEWING FILES ADDED TO A WORKFLOW

Step 1: A new files section has been added at the top right-hand side of the page.



Step 2: Any files or images that have been added to any step within a workflow will now also be stored in this files section and available to view or download.

Step 3: PDF & Images will open in a new web browser tab. Microsoft applications will download and can be opened in the desktop.

Step 4: If there is more than one version of a step with attachments these will all be stored in the files section with the corresponding step version number.

4. ACTIONING A NOTIFICATION EMAIL

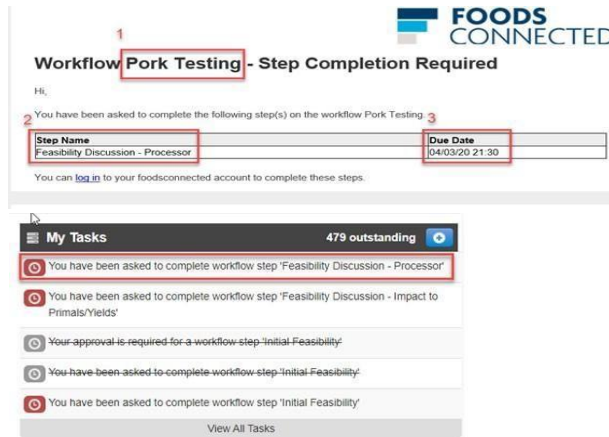
Step 1: Notification email's will be received from workflows@foodsconnected.com

Step 2: The workflow name will be in the header as shown (and the email subject line)

Step 3: The email will detail if step completion or step approval is required or more info required

Step 4: Select 'Log In' from the notification email and this will take you directly to step and associated action in question or alternatively visit: www.foodsconnected.com

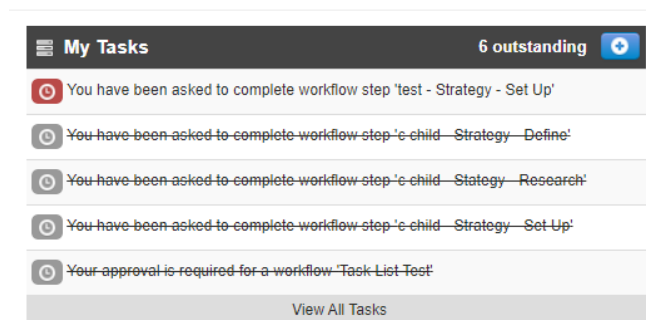
Step 5: To get to the workflow select the task quickly and easily from your task list:



4.1 HOME PAGE TASK LISTS

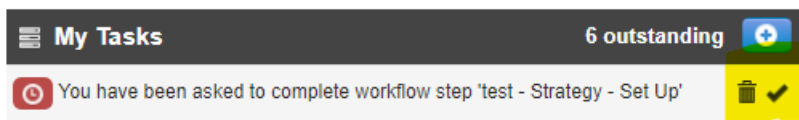
Step 1: Home page task list can be found on the user's home page when logged in

Step 2: By clicking on the task it will take the user to the location where they are required to complete their assigned task



Step 3: When the task has been completed, it will automatically update with a strikethrough. If a task has been deleted before the user can action it, it will automatically be deleted.

Step 4: Tasks can be manually deleted or marked as complete by selecting the bin or tick logo on the right-hand side



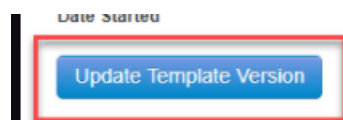
Step 5: If a template and any associated workflows are deleted all associated tasks will also be deleted.

4.2 CREATING A NEW TEMPLATE VERSION – UPDATING A WORKFLOW ALREADY IN PROGRESS.

Step 1: If any changes are now made to a template and it is approved the template will have a new increased version number associated with it.

Step 2: There may be already workflows created using the previous version which does not include the new changes.

Step 3: If you would like the workflows which are already in progress to take on the changes recently added to the template, open the workflow and there will be a new icon displayed – ‘Update Template Version’



Step 4: By clicking on this icon will open a new model, which will allow you to select the latest version of the template from the dropdown list.

Step 5: After updating to the latest version of the template all the steps in the workflow will be set back to ‘Not Started’ and the first step will be set to ‘In Progress’

4.3 PRODUCT CHECK MANAGER AND WORKFLOW MANAGER

Step 1: If adding a linked step to the Product Check Manager the check template, response template and confirmation templates must be created via the Product Check Manager (see the relevant guide or help topics for further assistance with this area)

Step 2: In the workflow step which is linked to the PCM the user can fill out the check template and save when complete. The step will remain ‘in progress’.

Step 3: In order to share the check template with a supplier the user will need to move to the PCM, view completed and then share the check template with the supplier.

Step 4: The selected user will receive an email and a home page task which they can follow in order to view the check they have been sent and then complete the response template.

Step 5: The original workflow step completer will then receive an email and a task informing them a response has been given to their product check, this must be viewed in the PCM where they can then close the check.

Step 6: When moving back into the workflow manager the step linked to the PCM will then be marked as completed and approved if the check has been closed in the PCM.

4.4 WORKFLOW MANAGER AND THE MOBILE APP

Step 1: In the mobile app select the workflow option and select in progress. This will display all the workflows which are currently being worked on.

Step 2: Select the relevant workflow form the list. At this point the list of steps will appear. An asterisk will appear adjacent to each step which the logged in user needs to complete, which mirrors what can be seen on the desktop.

Step 3: The step start date, due date, completion date and progress are all detailed.

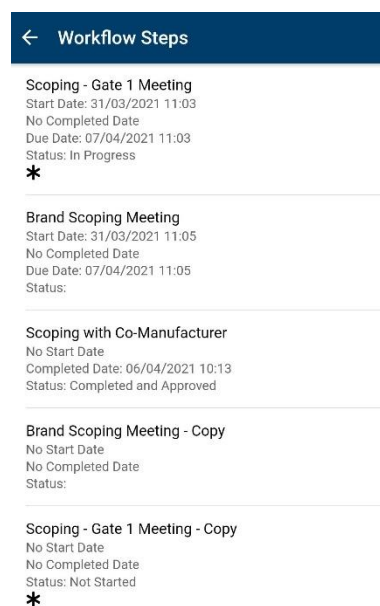
Step 4: The notes are also be found at the bottom on the screen.

Step 5: If prerequisites have been added then the steps must be completed in the desired order. If no prerequisites have been added the steps can be completed in any order.

Step 6: To complete a step, select the step-in question and click on the pencil icon, this will enable the form to be edited and completed.

Step 7: A red line and red asterisk will denote any fields which have been set up as mandatory.

Step 8: A save option is listed at the top right of the page whereby the step can be saved and submitted for approval.



4.5 MY ASSIGNED STEPS

Step 1: By clicking on Quality Management & Workflow Manager there will be the option for the user to select 'My Assigned Steps'.

Step 2: In this view it will display all the steps a user has an associated action with. This can be completing/ approving a step or more action required (if more info has been requested or a step has been rejected).



Step 3: The list will detail the workflow title, step name, the product name and code associated with the workflow if applicable and the status of the step itself and the due date for completion or approval. Filters are also available.

Step 4: By clicking on the edit option, it will take the user directly to the step where they have an action to complete. When complete, the task will be removed from the list.

Step 5: When the task has been completed the user must click on the Quality Management and Workflow Manager again to navigate back to the assigned steps.

4.6 OVERDUE STEPS

Step 1: Overdue Steps is a new tab in the Workflow Manager, it lists all the steps across all the workflows that are overdue for completion or approval.

Step 2: Any user can search through this list to find late tasks for a particular workflow, step, product, or user.

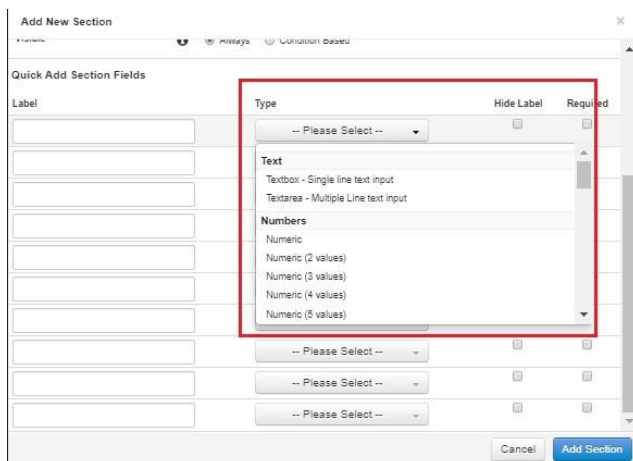
Step 3: There is an edit button beside each step task which will open into the relevant step page.

Step 4: To send an email reminder to the assigned users of the overdue steps, tick the checkboxes of the relevant steps and click on 'Notify Assigned Users'.

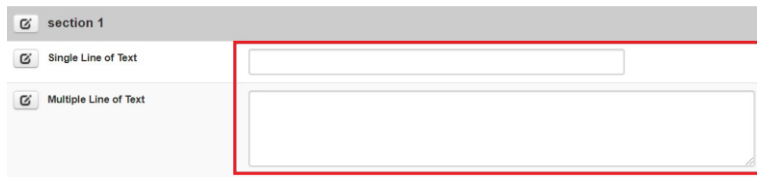
Step 5: Filters are also available including a site filter. If you have access to more than one site, you will now have the ability to narrow the search results quicker for any overdue steps.

5. APPENDIX

Various field types are available from the drop-down list.



Text box: Single line of text & Multiple line of text



Numeric Fields

Numeric

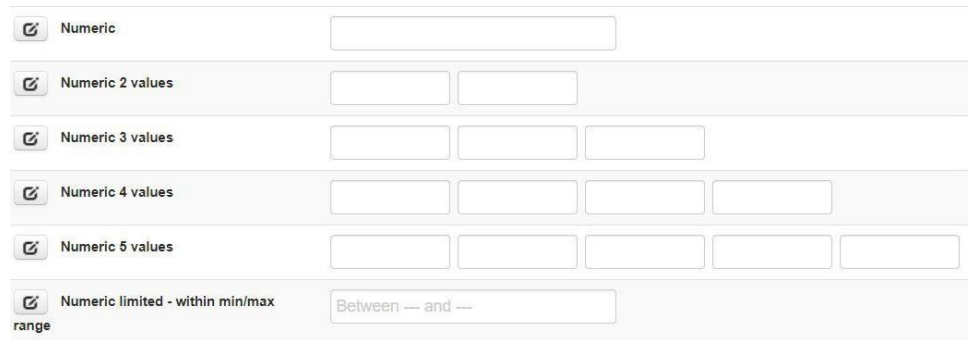
Numeric 2 Values

Numeric 3 Values

Numeric 4 Values

Numeric 5 Values

Numeric Limited (min/max range)



Calculation: These can calculate the results of numeric data only

Additional formatting can be added to numeric fields by selecting the field edit icon:

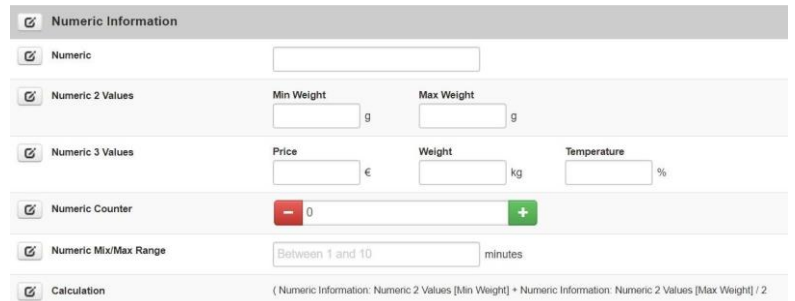
Value Labels: (Name of numeric field)

Decimal Places

Units: E.g. (Kg, %, Boxes, £, Months, Pallets)

Min/Max Range: The user must enter the min/max range possible

Counter: Can only be selected if using a single numeric field



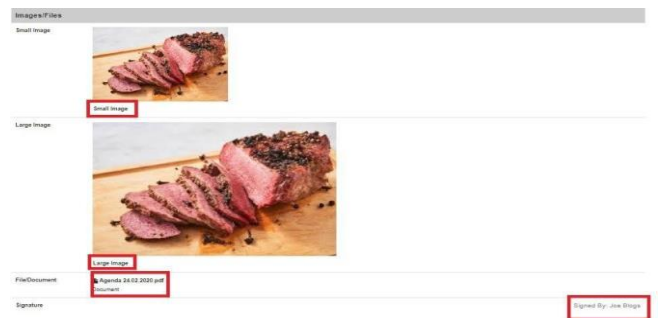
Images/Files

Small Image

Large Image

File/Document

Signature



Joe Bloys

Date & Time

Date: select from calendar

Time: select from time picker

Dropdowns

Standard dropdown

Quantity with dropdown

Dropdown with comment Yes/No

Yes/No dropdown with comment

Linked dropdown (the options available in the dropdown will be dependent on another dropdown)

Numeric Dropdown

When a dropdown fields is added, select edit to add the required options as detail above

Check Boxes

The user can edit the field and add as many check boxes as required

More than one check box can be selected by the step completer



Grids & Tables – These are not compatible with the mobile app

Grid/Textbox

The user must edit the field to add column & row names in order to generate a table

The table will be displayed as per below

	Pack Weight	Tray Colour	Label Type
Product 1	<input type="text"/>	<input type="text"/>	<input type="text"/>
Product 2	<input type="text"/>	<input type="text"/>	<input type="text"/>
Product 3	<input type="text"/>	<input type="text"/>	<input type="text"/>

Grid/Textbox Grid: Follow the same steps as outlined above. The table will be displayed as per below:

	Pack Weight	Tray Colour	Label Type
Product 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Completion Aids

Help files can be attached to a form to assist and help the user on the workflow completion or for a form that requires to be completed in addition to the data form. When a user is completing the step they can open the help form, download and edit the form and re upload if required.

The screenshot shows the 'Update Field' dialog box with the following configuration:

- Field Label:** Detail Target Customer (habits and opportunity) [Show]
- Section:** New Product Set up
- Field Type:** Internal Field Reference -
- Reference Field:** (Dropdown menu open showing options: Grids, Textboxes, Checkbox Grid, Completion Aids, Prepopulated Options)
- File:** (Empty field)
- Help Text:** (Empty field)
- Help Image:** (Empty field)
- Required:** No Always Condition Based
- Visible:** Always Condition Based
- Buttons:** Delete Field (red), Cancel, Update Field (blue)

Pre-Populated Fields

Various prepopulated fields can be selected from a dropdown list

These will only work correctly if the data is already on the

The screenshot shows a form with four dropdown menus, each with a pre-populated list of options:

- Countries:** --Please Select--
- Site Employees:** --Please Select--
- Site Products - Packaging:** --Please Select--
- Meat Suppliers:** --Please Select-- (dropdown open showing options: --Please Select--, ABP Food Group - ABP Beef - ABP Bandon (IE 351), CPF - Demo 1, Foyle Food Group - Foyle Campsie (UK 9016), Foyle Food Group - Foyle Donegal (IE 292), Foyle Food Group - Foyle Gloucester (UK 2172), Foyle Food Group - Foyle Melton Mowbray (UK 2077), Foyle Food Group - Foyle Omagh (UK 9042), WalkMe)