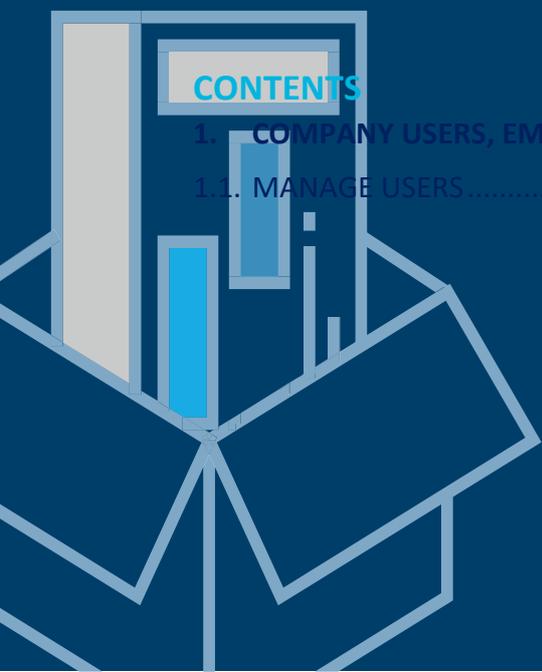


TOOL USER GUIDE

COMPANY USERS EMAILS & SECURITY



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1. COMPANY USERS, EMAIL & SECURITY

1.1. MANAGE USERS

Step 1: Log in to your Foods Connected account

Step 2: Locate the settings tab in the top right-hand corner



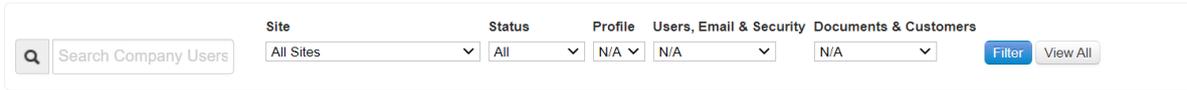
Step 3: Navigate to ‘Manage Users’ under ‘Company Users, Email & Security’



> Company Users, Email & Security



Step 4: Users can be searched for; and filters can also be used as shown below



Step 5: Users can also be unlocked; passwords can be reset, and users can be invited using the buttons as shown below

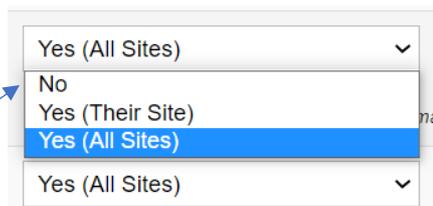


Step 6: Name of users, their associated site, status, and access roles (Manage Company Profile, Manage Users, Email & Security and Manage Company Documents & Customers) can be viewed.

Step 7: User details can be edited using the 'Update' button drop down as noted below.



Step 8: When the 'Edit User Details' option is selected the following page appears- it shows name; email address, status and site. Accounts can be unlocked using the 'Unlock' button at the far side of 'Status'. Access levels can also be controlled e.g. Manage Company Profile; the drop down can be used to select the appropriate access level as shown



Users can be removed and/or records can be transferred using the red button in the bottom right corner 'Remove User/ Transfer Records'.

Step 9: When 'Set User Access' is selected the following page loads; selected users can be searched for using the search bar. Both 'Company Roles' and 'User Access Roles' per tool can be updated using the grey 'Update' button. New user roles can also be added by selecting the 'Add User Role' button.

Settings **Manage Individual Users**

Selecting No supplier types for a subscription defaults the selected users access to All supplier types

Manage Individual Company Users below, please ensure they are assigned to the correct site and access roles before approving.

Selected User:



Search...

Company Roles

Copy User Roles

Name	Site	Status	Manage Company Profile	Manage Users, Email & Security	Manage Company Documents & Customers	
			Yes (All Sites)	Yes (All Sites)	Yes (All Sites)	<input type="button" value="Update"/>

User Access Roles

Add User Role

Subscription	Roles	View Access	Customer Access	Supplier Types	
Supplier Manager	<ul style="list-style-type: none"> Edit Admin Approve Documents 	1 Company Site	All Customers	All Supplier Types	<input type="button" value="Update"/>
Questionnaire Manager	<ul style="list-style-type: none"> Edit Admin Respond 	All Company Sites	All Customers	All Supplier Types	<input type="button" value="Update"/>

Note: Users can be provided access to all sites/their site only or specific sites.

1.2. USER ACCESS

1.2.1 - BY USER

Step 1: Log in to your Foods Connected account

Step 2: Locate the settings tab in the top right-hand corner



Step 3: Navigate to 'User Access- By User' under 'Company Users, Email & Security'

> Company Users, Email & Security

Manage Users	User Access - By User	User Access - By Tool	User Access Requests	Company Teams	Invite New User	Company Email Alerts	Company Security Settings	Company Privacy Settings

Step 4: Use the search bar to look up the particular user; their roles will then appear

Settings **Manage Individual Users**

Selecting No supplier types for a subscription defaults the selected users access to All supplier types

Manage Individual Company Users below, please ensure they are assigned to the correct site and access roles before approving.

Selected User:

-



Search...

1.2.2 -BY TOOL

Step 1: Log in to your Foods Connected account

Step 2: Locate the settings tab in the top right-hand corner



Step 3: Navigate to ‘User Access- By Tool’ under ‘Company Users, Email & Security’



Step 4: The following page will appear- the dropdown can be used for ‘Subscription’ and ‘Site’; once chosen select ‘Load User Roles’. Once user roles have been loaded, they appear in a table format; showing User, site, view access and whether the individual can edit, has admin access, and approve documents. Customer access and supplier types are also visible in the table. If these subscription roles/access levels need updated, click the ‘Update’ button and select ‘Save’ when done.

New users can be granted access using ‘Grant New User(s) Access’ button.

Settings [Update User Access Levels](#)

Please select a subscription and a site (if applicable) from the dropdowns. Click on 'Load User Roles' to refresh the table with your selected options.

Subscription

Site

Search your Company Users...

User	Site	View Access	Edit	Admin	Approve Documents	Customer Access	Supplier Types	
			✓	✓	✓	All Customers	All Supplier Types	<input type="button" value="Update"/>

1.2.3 -REQUESTS

Step 1: Log in to your Foods Connected account

Step 2: Locate the settings tab in the top right-hand corner



Step 3: Navigate to ‘User Access Requests’ under ‘Company Users, Email & Security’



Step 4: Select ‘Company Access Requests tab’ ; this will load up company access requests in a table format as shown below. Click the ‘View’ button to accept or decline the request. You can also view ‘Company Admin Requests’ using the second tab; these load in the same format as the company access requests.



Settings **User Access Requests**

Company Access Requests Company Admin Requests

Request Date	From User	Subscription	Assigned To	Message	
					View

1.3. COMPANY TEAMS

Step 1: Log in to your Foods Connected account

Step 2: Locate the settings tab in the top right-hand corner



Step 3: Navigate to 'Company Teams' under 'Company Users, Email & Security'

> Company Users, Email & Security



Step 4: The following page will load; new teams can be added using the 'Add New Team' button. Company Site, Team Name and Team Members will be presented in a table format. You can edit each team individually by selecting the 'Edit Company Team' button; once this button has been selected members can be added/removed, the team name changed, and a different site selected.

Settings **Company Teams**

Currently viewing **All Sites** Company Groups Change Site

[Add New Team](#)

Company Site	Team Name	Team Members	
			Edit Company Team

1.4. COMPANY TEAMS SETTINGS- CUSTOMERS

Step 1: Log in to your Foods Connected account

Step 2: Locate the settings tab in the top right-hand corner



Step 3: Navigate to 'Company Teams' under 'Company Users, Email & Security'

Step 4: The following page will load; click one of the following icons:



Step 5: When creating or editing a company team, you can set which customers it is visible for. You can set them to 'ALL', or choose from a list of customers you are linked to as shown below.

1.5. INVITE NEW USER

Step 1: Log in to your Foods Connected account

Step 2: Locate the settings tab in the top right-hand corner



Step 3: Navigate to 'Invite New User' under 'Company Users, Email & Security'

> Company Users, Email & Security



Step 4: The following page will load; name and email address fields are mandatory- therefore they are highlighted in red. Once the other sections have been filled in (as



desired) select the 'Add User' button.

Settings **Manage Users** **User Details**

Enter the user's details below and click 'Add User'. They will then be sent an email with instructions on how to complete their registration.

Name	<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>
Email Address	<input type="text" value="Email Address"/>	
Site	Foods Connected Ltd (Group) ▾	
Manage Company Profile	No ▾	
	<i>Is able to update the Company Profile Information</i>	
Manage Company Users, Email & Security	No ▾	
	<i>Will receive emails to approve new users' that try join the company.</i>	
Manage Customers & Company Documents	No ▾	
	<i>Will receive emails for document requests and expirations.</i>	
Manage Company Product File	No ▾	
Site Departments	There are no departments listed ...	

act Language

1.6. USER ACCESS HISTORY

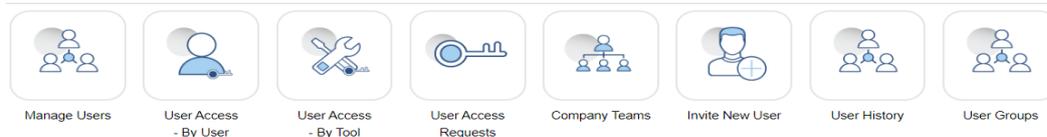
Step 1: Log in to your Foods Connected account



Step 2: Locate the settings tab in the top right-hand corner

Step 3: Navigate to 'Company Email Alerts' under 'Company Users'

> Company Users



Step 4: The following page will load with two tabs 'User History' and 'User Access History'.

'User History' shows 'User Changed', 'User Site', 'Actioned By' and 'Action'.

Settings **User History**

User History User Access History

Review users history for your company. Review who made user changes, or specific company roles.

Date From: [] Date To: [] User Changed: All User Site: All Actioned By: All Action: All Filter Clear Filters

Export to Excel

Date Recorded	User Changed	User Site	Actioned By	Action
15/02/22 13:47	[]	Foods Connected (Group)	[]	User Invited
02/02/22 12:04	[]	Foods Connected (Group)	[]	User Invited
01/02/22 22:46	[]	Foods Connected (Group)	[]	User Invited

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

Whilst 'User Access History' shows 'Tool', 'User Changed', 'User Site', 'Actioned By' and 'Action'.

Settings **User Access History**

User History User Access History

Review users access history for your company sites. Review who made user changes, which tool access was given to which user and when.

Date From: [] Date To: [] Tool: All User Changed: All User Site: All Actioned By: All Action: All Filter Clear Filters

Export to Excel

Date Recorded	Tool	User Changed	User Site	Actioned By	Action
02/03/2022 15:00:01	Risk Assessment Manager	[]	Group	[]	Revoked 'VIEW'
02/03/2022 15:00:01	Risk Assessment Manager	[]	Group	[]	Added 'ADMIN'
02/03/2022 15:00:01	Risk Assessment Manager	[]	Group	[]	Added 'SHARE'
02/03/2022 15:00:01	Risk Assessment Manager	[]	Group	[]	Added 'TEMPLATE'
02/03/2022 15:00:01	Risk Assessment Manager	[]	Group	[]	Added 'RECORD'
01/03/2022 15:45:10	Workflow Manager	[]	Group	[]	Added 'VIEWMASTER'
01/03/2022 15:45:10	Workflow Manager	[]	Group	[]	Added 'GENERATE'
01/03/2022 15:45:10	Workflow Manager	[]	Group	[]	Added 'CREATE'
01/03/2022 15:45:10	Workflow Manager	[]	Group	[]	Added 'ADMIN'

NOTE: Displaying who created/granted each user with access to Foods Connected (alongside the date/time/actioned details) will show regardless of whether the user has been granted access to the Foods Connected tools or not.



1.7. USER GROUPS

Step 1: Log in to your Foods Connected account

Step 2: Locate the settings tab in the top right-hand corner

Step 3: Navigate to 'User Groups' under 'Company Users'

> **Company Users**



Step 4: The following page will load.

Settings [User Group Templates](#)

Site: All Sites Filter Clear

+ Add New Delete Selected Export to Excel

	User Group	Site			
<input type="checkbox"/>	Master Roles	Group	0 Users	3 Tools	
<input type="checkbox"/>	Group Roles	Group	0 Users	1 Tools	

With three tabs “Add new” “delete Selected” and “Export to excel”

Step 5: The following page will load when choosing “Add new”

Settings [User Group Templates](#) - Create Template

Name:

Site:
Foods Connected Ltd (Group)

Save Cancel

Step 6: Fill in the name and choose your site and hit save to save your new group.

1.8. COMPANY EMAIL ALERTS

Step 1: Log in to your Foods Connected account

Step 2: Locate the settings tab in the top right-hand corner



Step 3: Navigate to 'Email & Security'

> **Email & Security**



Step 4: This page will load; it will show alerts according to site, user, what the alerts are for and whether they are incoming/outgoing (or both). If any of these aspects need updated select 'Edit' and the site, user etc can be changed. Once done click 'Save'.

Site	User	Receiving Email Alerts For	Incoming/Outgoing	Edit
<input type="checkbox"/>				

Step 5: New alerts can be added by clicking 'Add New'; once done select 'Save'.

Settings [Email Alerts](#)

Site	All Sites
Set For	<input checked="" type="radio"/> Company User <input type="radio"/> Email Address
Company User	Audit Team
Receive Emails Alerts For	Audit Manager
Incoming/Outgoing	Both