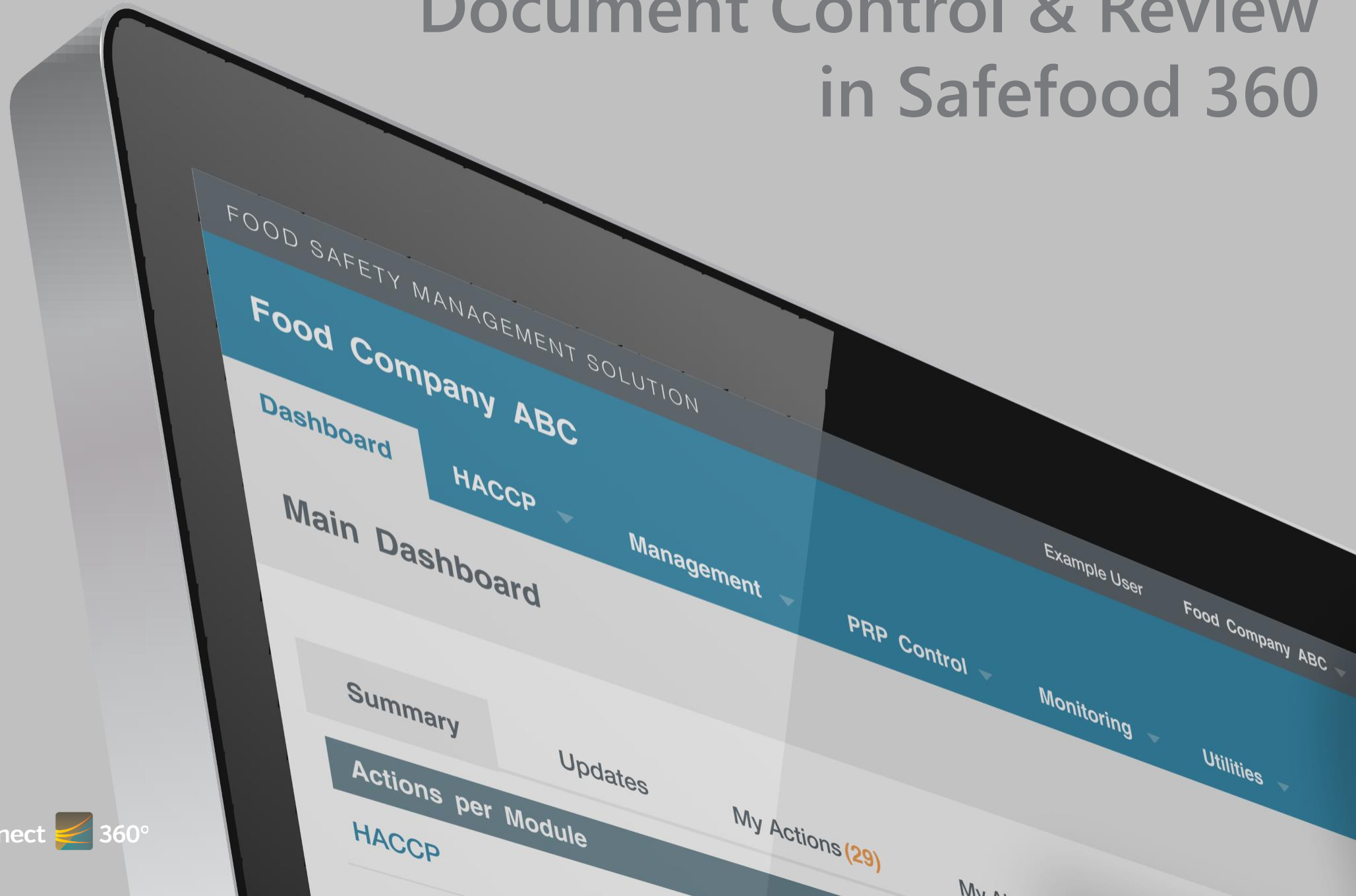


Document Control & Review in Safefood 360



Session Overview

Purpose:

- To learn about how to effectively control documents in Safefood 360
- To understand the difference between periodic reviews and a document review for approval
- To cover some useful tips about the Documents module in Safefood 360

Session Leader:

- Braden Snapp, Customer/Technical Support Manager, Safefood 360

Timing:

- 45 Minutes

Agenda:

- Doc Control in Safefood 360 Advantages (2 minutes)
- An Overview of the Documents module (10 minutes)
 - Documents Module
 - Review Record vs. Review for Approval
 - Document Review
 - Versions
 - Reporting
- Practical Exercises (25 minutes)
- Tips and Tricks (5 minutes)
- Questions

What does Doc Control look like in Safefood 360

Requirement

Safefood 360 Solution

Version Control

- Most recently approved version is the only available to those without Edit rights to the Document module
- All links from programs to documents are automatically updated to the most recent approved.

Approval Process

- Streamlining and automating the need to create a review and approval process
- Complete audit log of all approvals and reviews

Recurring Reviews

- Ability to set up a schedule for each document to be reviewed
- Can create alerts and reminders for many or a single user
- Can upload a new version directly to the document from the review record

Documents Module: Where to access the Reviews and Documents

Management Module
Document Review records can be accessed here.

Add Document
Add a new document

Documents Module
Documents, Document Review and Document Approval Process actions can be accessed here

Information about the Document
Download, preview, and basic information about the document.

ABC Food Company Inc

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Documents

Add Document

DocumentsActions (45)Reports

Document

Documents

Chemical Specifications

Data Sheets

Safety Data Sheet

MSDS Sheets

Documents

Employees

Products & Materials

Categories

Contacts

Items

Tests

Search (wildcard = %)

Archive: On

Added By

Date Modified

Version

Status

Barry O'Neill

09/07/16

3

Approval Not Required

Search Documents
Note use of wildcard.

View Archived records by clicking this and toggling between OFF and ON

A Review Record is not a Document

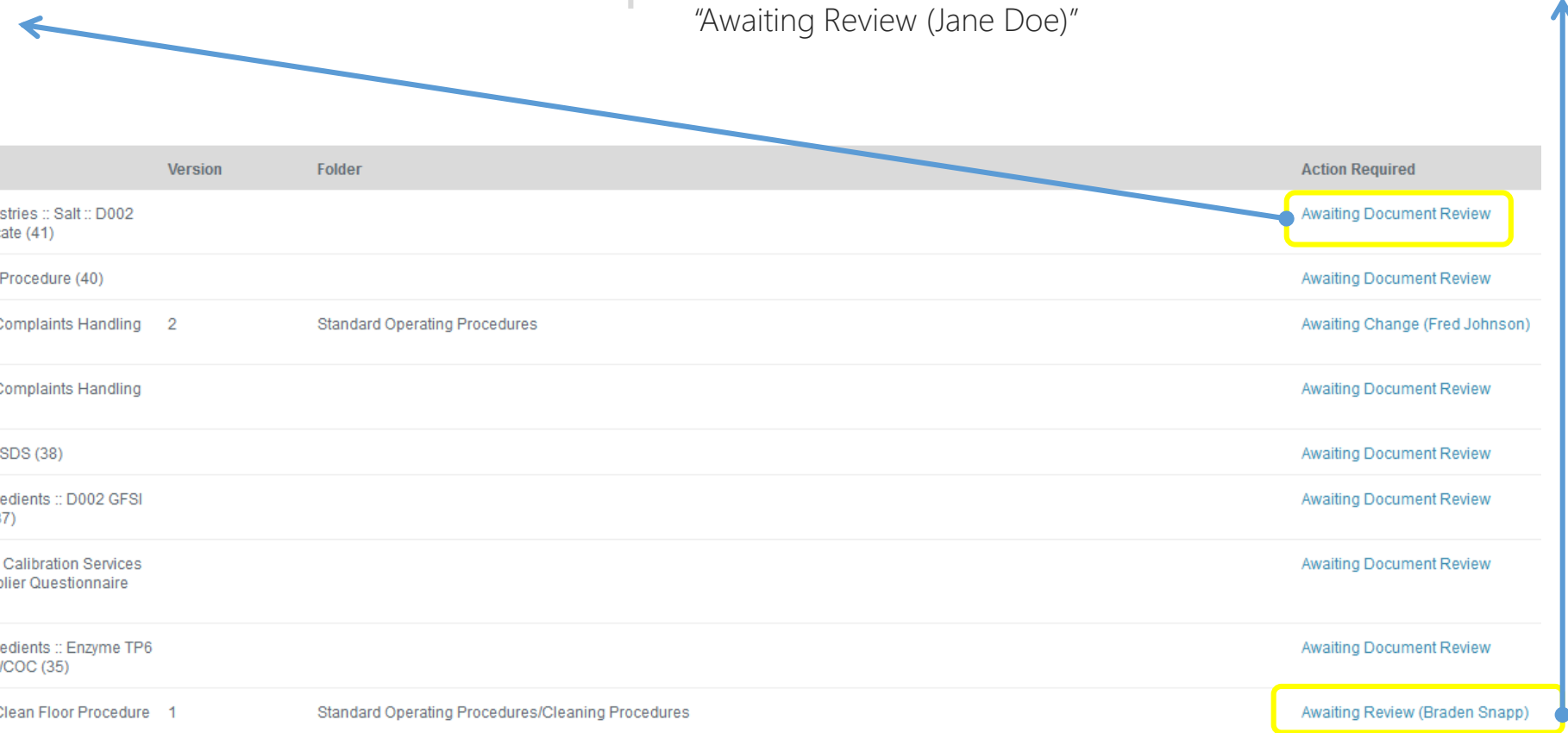
Review Records are created when a document is put on a schedule. A separate record is created from the document to check "Is the document still ok?"

"Awaiting Document Review"

Awaiting Review IS for a Document

If an action says it is "Awaiting Review" it is part of the Approval process. The document is waiting for someone to accept the new updates to the document

"Awaiting Review (Jane Doe)"



No.	Date	Name	Version	Folder	Action Required
41	01/31/17	Nelden Industries :: Salt :: D002 GFSI Certificate (41)			Awaiting Document Review
40	01/10/17	Complaints Procedure (40)			Awaiting Document Review
46	12/15/16	Consumer Complaints Handling Policy	2	Standard Operating Procedures	Awaiting Change (Fred Johnson)
39	12/15/16	Consumer Complaints Handling Policy (39)			Awaiting Document Review
38	12/07/16	Safeclean MSDS (38)			Awaiting Document Review
37	11/27/16	Belrose Ingredients :: D002 GFSI Certificate (37)			Awaiting Document Review
36	11/15/16	Right Weigh Calibration Services :: D001 Supplier Questionnaire New (36)			Awaiting Document Review
35	11/08/16	Belrose Ingredients :: Enzyme TP6 :: D007 COA/COC (35)			Awaiting Document Review
41	10/28/16	QMS-W03 -Clean Floor Procedure - Main Floor	1	Standard Operating Procedures/Cleaning Procedures	Awaiting Review (Braden Snapp)

A Document Review Record Is a type of Management Review Record

A Management Review record is a scheduled record that is linked to the document. It lets you look up that document to see if it is still valid. If not, the document can be replaced. If it is still valid, after completion there is a record certifying that the document is acceptable as is.

Document Review record is also used in the Supplier Portal to obtain updated Documents from Suppliers.

Next Review for this document

A checklist of requirements that your company would like to check during the scheduled review
Note that this can be changed.

Management Review

(But can also be viewed through Master Data)

Document to be reviewed can be clicked here

If the document is not valid after review, it can be replaced here

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Document ReviewManagement Review

OPEN - Awaiting Document Review

No.	Date	Name	Document
41	01/31/17	Nelden Industries :: Salt :: D002 GFSI Certificate (41)	Nelden Industries :: Salt :: D002 GFSI Certificate

Document Review

Date01/31/17

NameNelden Industries :: Salt :: D002 GFSI Certificate (Replace)

Reason for ReviewScheduled

Next Review02/10/18

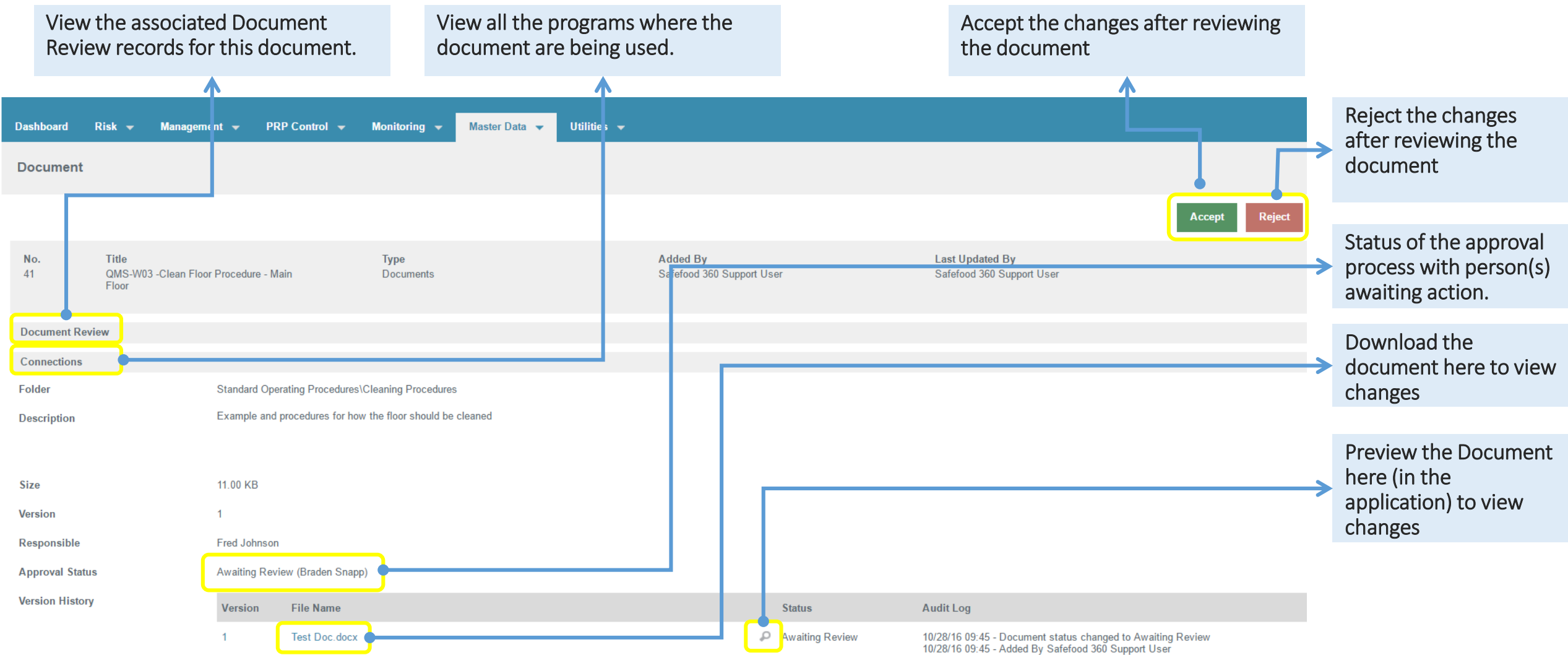
Completed By

Checklist

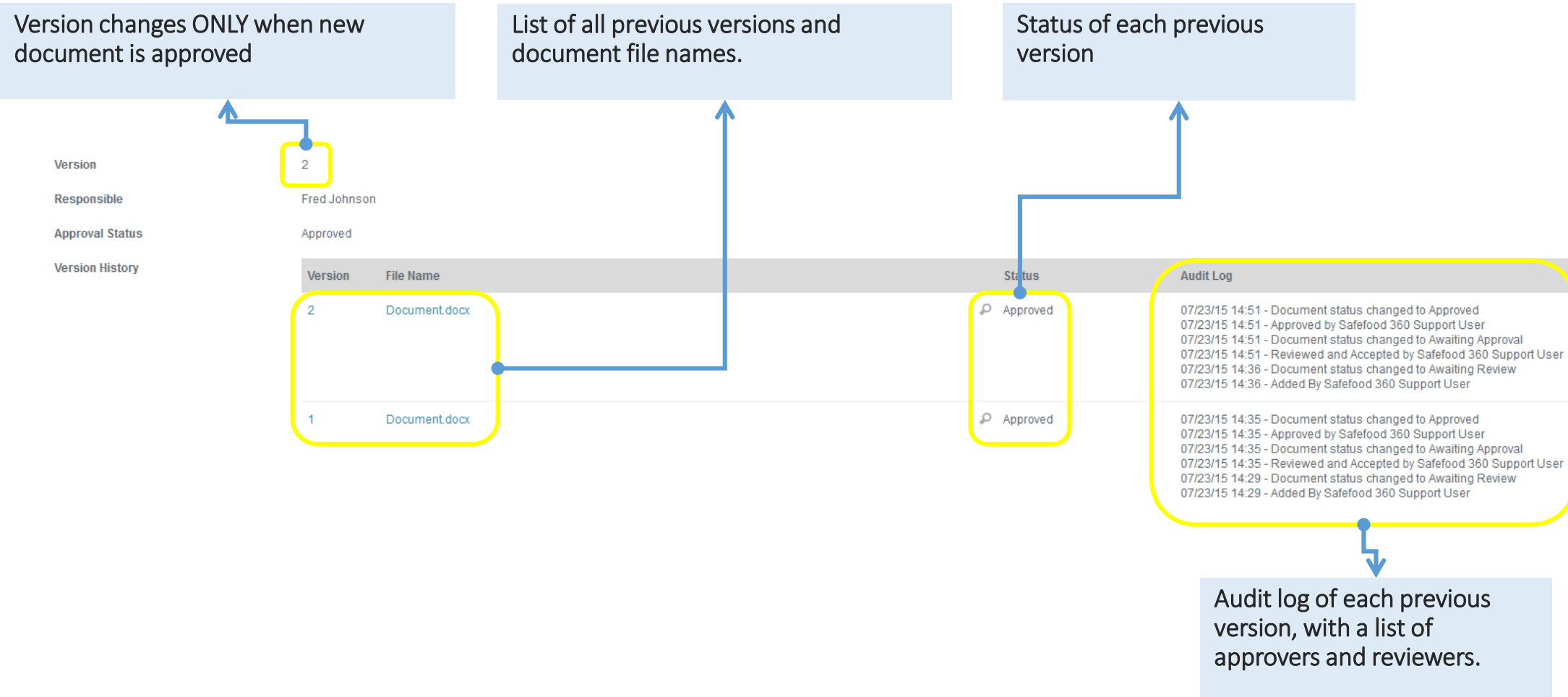
Requirement	Response	Comments / Observations
Does the document and the information contained meet the requirement?		
Add Line		

SaveSave & SubmitCancel

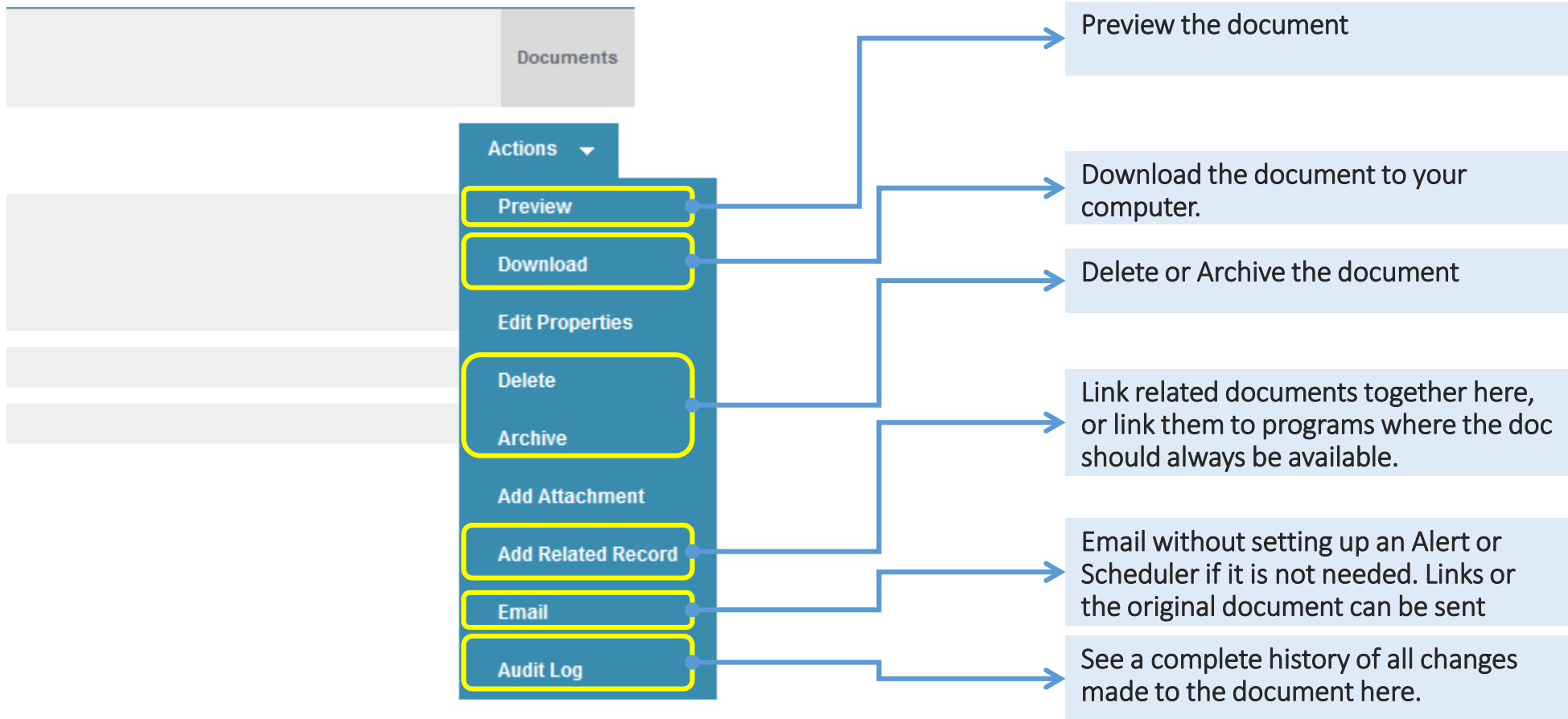
Document Approval Process - Can include Reviewer, Approver, or None



Versions: Complete audit trail of all document versions



Useful Actions for the Document without Editing properties



Options when Emailing a Document

Add emails with comma separator

Actions > Email

Include a link to the document, an attachment, or both

Include yourself as a CC

Send via email (use commas to separate multiple addresses)

Email(s):

Subject: ABC Food Company Inc : You have been sent Safeclean

Include: ☒ Link to Document ☐ File Attachment ☐ Both

Hello,
Safefood 360 Support User of ABC Food Company Inc has sent you Safeclean MSDS. ABC Food Company Inc uses Safefood 360 to help manage their food safety.

☐ Send me a copy (support-user@safefood360.com)

Send

Actions

Last Updated By
Philip Gillen

Document Reporting

Click on the Reports tab in Document to access the Report Registers

Documents

+ Add Document

Documents

Actions (52)

Reports

Report Registers

Shows registers / lists of records by status / type

By Approval Status

By Approver

By Approval Date

By Master Folder

Data Export

Export your module

Export to Excel

Report Manager

Use Report Manage

Report Manager

Reporting: Documents by Approval Status

Change the drop down to view documents in different statuses

Can export registers / reports to Excel.

Report (Documents)

Status Awaiting Approval

1 of 1 Find | Next



Document Register (Awaiting Approval)

ABC Food Company Inc

No.	Date	Name	Version	Folder	Status	Last Review	Responsible	Next Review
19	2015-6-11	Calibration Procedure	3	Standard Operating Procedures/Calibration Procedures	Awaiting Approval(Fred Johnson)	2015-7-1	Fred Johnson	2017-6-21
26	2015-9-3	Belrose Ingredients :: Enzyme TP6 :: D007 COA/COC	1	Suppliers/Active/Belrose Ingredients	Awaiting Approval(Sally Smith)	2015-9-3	Fred Johnson	2017-11-8
55	2017-2-13	Belrose Ingredients :: Enzyme TP6 :: D001 Supplier Questionnaire	1	Suppliers/Active/Belrose Ingredients	Awaiting Approval(Sally Smith)	2017-2-13	Fred Johnson	

Reporting: Documents by Approvers

Change the drop down to select different approvers and see the status

Also, it is possible to limit the Status to only a certain action

UI controls for document filtering:

Show: Fred Johnson

Status: All Status

Navigation bar: 1 of 1, Find | Next, and other controls.

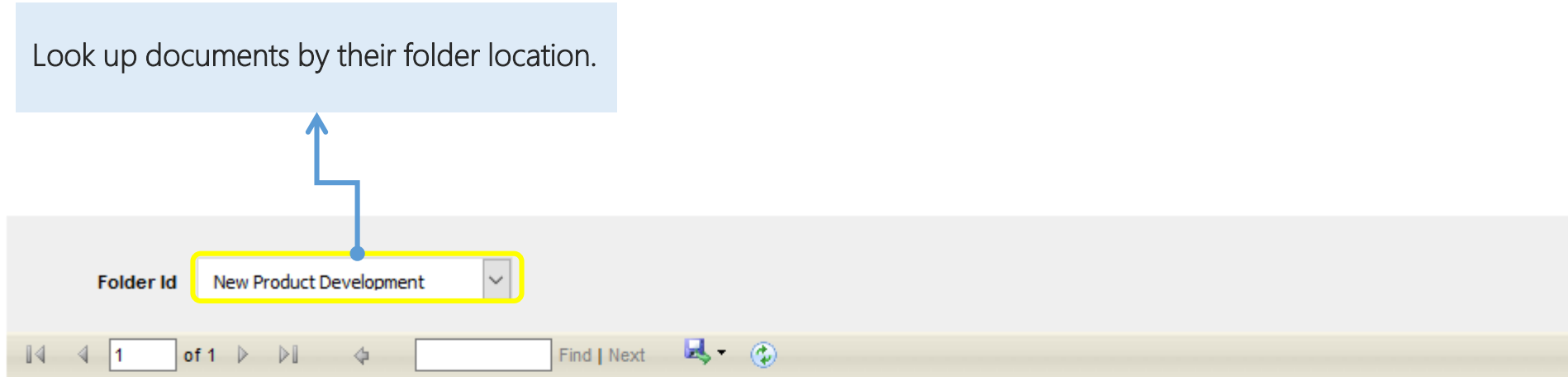
Document Register (Fred Johnson)

ABC Food Company Inc

No.	Date	Name	Version	Folder	Status	Last Review	Responsible	Next Review
19	11 Jun 2015	Calibration Procedure	3	Standard Operating Procedures/Calibration Procedures	Awaiting Approval(Fred Johnson)	1 Jul 2015	Fred Johnson	21 Jun 2017

Reporting: Documents by Master Folder

Look up documents by their folder location.



Folder Id **New Product Development**

1 of 1 Find | Next

Document Register (New Product Development)

ABC Food Company Inc

No.	Date	Name	Version	Folder	Status	Last Review	Responsible	Next Review
29	20 Oct 2015	Food Innovation Toolkit - Idea Management	1	New Product Development	Approval Not Required	20 Oct 2015	Fred Johnson	
21	23 Jul 2015	Foreign Material :: Glass	4	New Product Development	Approval Not Required	23 Jul 2015	Minnie de Mocher	

Using Report Program for Doc Approval

Click on Utilities > Reports and click on Add Program

Select the Documents module, Report Registers, and the By Approver report to send on a schedule to the approver

Then, name the report after the approver and send it to that person in Excel format. The Approver can use the report as a reminder of open documents that need their approval.

DashboardRiskManagementPRP ControlMonitoringMaster DataUtilities

Report Programme

Report Criteria

ModuleDocuments

Report TypeReport Registers

ReportBy Approver

RangeLast 1 Month

Criteria 1Braden Snapp

Criteria 2Awaiting Approval

Report Details

NameBraden Docs Awaiting Approval

Start Date02/18/17

Repeat Every1Months

Email To

ContactSnapp, Braden (Technical Support Manager)

Add Line

File TypeExcel

Documents Linked to

Documents

A Document linked to a program or test will always show the most recent approved document

But a completed record will retain the version from when the record was done.

The Preview function allows users without Word to view documents directly in Safefood 360.

Document Preview

Monitoring Record

Date

Record

Report

Retest

Signed: Philip Gillen, 08/25/16 10:26

Metal Detection SOP

BY PASSING TEST PIECES THROUGH THE OPENING OF THE DETECTOR TO VERIFY THAT THEY ARE REJECTED AND BY PASSING TEST PIECES IN SUCCESSION FOR MEMORY/RESET FUNCTION TEST (RECORD "MRF" IN COMMENTS SECTION WHEN THIS TEST IS PERFORMED)



1. If you check the metal detector and it does not pass, you must place the previous product on hold for further evaluation. Inform your supervisor and the Quality Control Department immediately. Do not run the line with a malfunctioning metal detector. Record in the comments section that you placed the product on hold and record the hold number from the Product Hold form.
2. Any product that is rejected by the metal detector will be automatically dumped off into a yellow "metal" pan. Record the number of metal detector rejections each hour. Follow the Metal Detector Rejections procedure should you have more than 10 rejections in an 8 hour period. Any item you find must be turned in to the Quality Control Department with a Food Safety Report.
3. If you have run product and you doubt that it is metal free, do not hesitate to contact your supervisor and place the product on hold

PAGE 1 OF 1

click

Ferrous

d

d

And the document can still be downloaded after previewing if desired.

Difference between Documents and Attachments

Adding a document as an attachment to a record or program does NOT link it to a controlled version in Safefood 360. This is best used for external guidelines or picture examples

Internal Audit

COMPLETED

No.	Date	Name	Programme	Risk	Department
1728	01/17/2017	Hygiene Audit :: Daily Test (1728)	Hygiene Audit-Test	None	Quality

Related Records

Corrective Action (686) - Awaiting Action Details

Attachments

best-practices-for-measuring-hand-hygiene-compliance.jpg x

Actions

Delete

Archive

Add Attachment

Add Related Record

Print

Email

This is not the same as adding a document to a program or record through a link or selecting it as a procedure. In this case, it will be the controlled version.

Chemicals

Acceptable or tolerable risk – no specific action required

Chemical	Approval Details	Intended Use	Material Safety Data Sheet
NEW CHEMICAL			

Add Line

Required Training

Programme Name

Search:

Documents

1TEST1

2016

Do or Do Not. There is no try. – Yoda



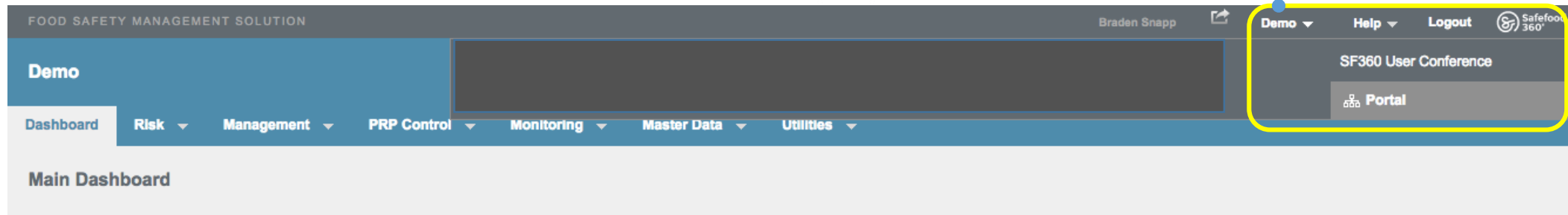
Document Control and Review with Safefood 360°

Task

Login to Safefood 360 and go to the SF360 User Conference site.

Instructions

- Go.safefood360.com
- Sign in using your work email
- Go to SF360 User Conference



Download and Add a New Document

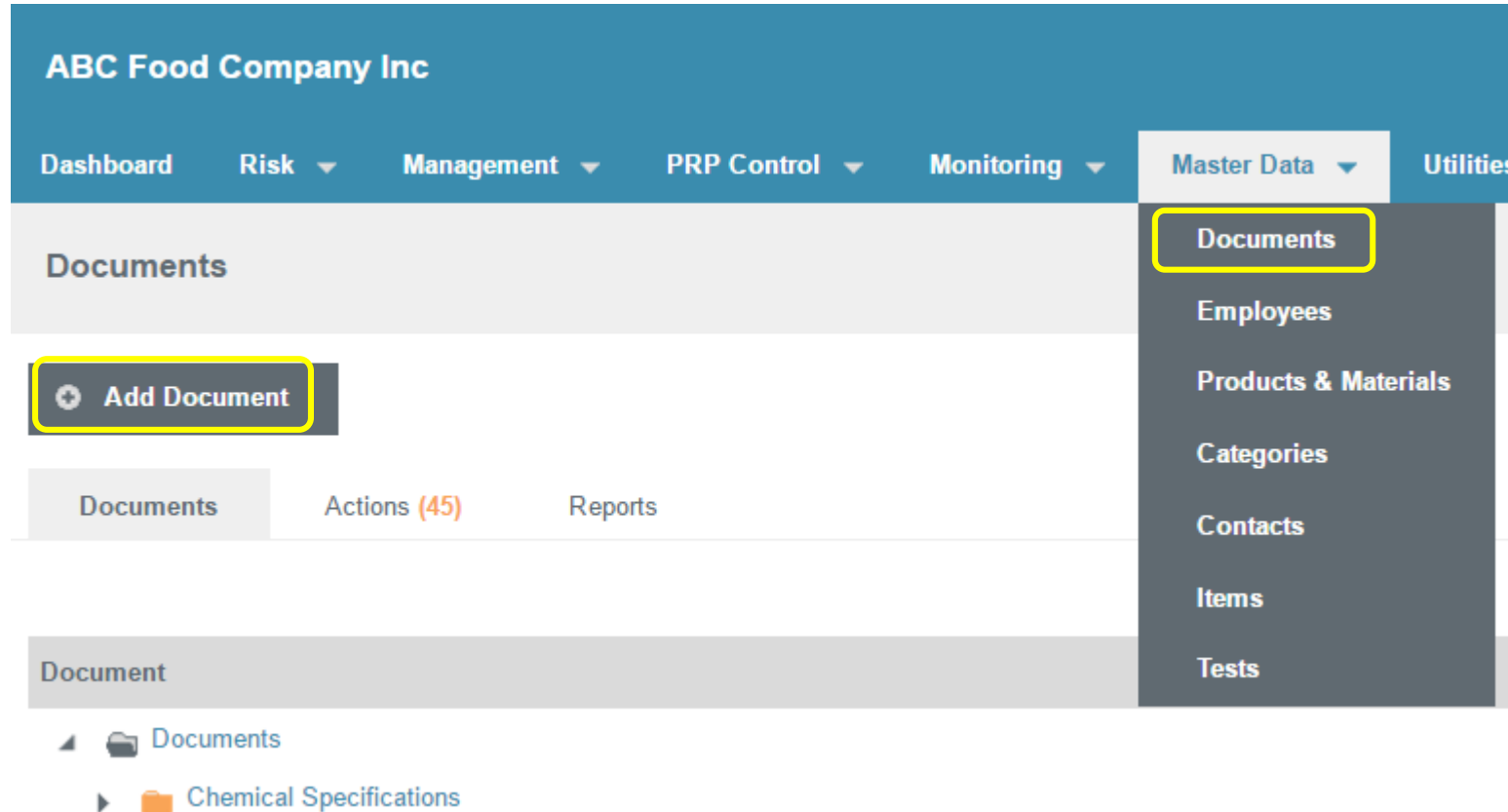
Task

Add a new document to the documents module

15 minutes

Instructions

- Download Form 1040 from:
<http://connect.safefood360.com/files/>
- Go To Master Data > Documents
- Click on Add a Document
- Create a new starting version number
- Make yourself responsible as a reviewer and approver
- Set it up for a yearly review starting today
- **ADD YOUR NAME TO THE FRONT OF THE DOC NAME**



The screenshot displays the Safefood 360° user interface for 'ABC Food Company Inc'. The top navigation bar includes links for Dashboard, Risk, Management, PRP Control, Monitoring, Master Data, and Utilities. The 'Master Data' dropdown menu is open, showing options like Documents, Employees, Products & Materials, Categories, Contacts, Items, and Tests. The 'Documents' option is highlighted. Below the navigation bar, the 'Documents' module is active, showing a table with columns for Documents, Actions (45), and Reports. The 'Add Document' button is highlighted in the table. Below the table, there is a section for 'Document' with a tree view showing 'Documents' and 'Chemical Specifications'.

Document Control and Review with Safefood 360°

Task

Fill in the details section with relevant information for the document.

10 minutes

Instructions

- Fill in Title and Description with
- Complete Version number – Can change to any version needed to start
- Highlight “Forms”- the folder where the document will be kept. (Click once on the folder)
- Click on the button with three dots in Select File
- Click the drop down next to Responsible and select the person who is responsible for making changes to this document. Document Owner.
- Hint: this is not the document reviewer in the approver process.

Document Details

Title

[Your Name] Tax Form 1040

Description

Government tax form for individuals

Version

2015

Select File

...

Folder

- Documents
 - Chemical Specifications
 - Complaint Responses
 - Forms
 - New Product Development
 - Presentations
 - Specifications
 - Specifications1
 - Standard Operating Procedures
 - Suppliers

New Folder

Rename

Delete

Responsible

Snapp, Braden (Technical Support Manager)

Activity Continued – Approvals and Scheduler

- Add your own name to the Approval Workflow, then click both the Review and Approve check boxes.
- Click on “Enable Periodic Review”
- Leave the default date (today), for this exercise. However, normally you would put the NEXT date the document needs to be reviewed or expires.
- Leave the defaults for Repeat Every and Action Notice
- Click on “Send Email Notification” and add “Chris Domenico” from the Employee list
- Click Save

Approval Workflow

User	Review	Approve	Notify of Change
Braden Snapp	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

+ Add Line

☒ Enable Periodic Review

Start Date: 02/08/17

Repeat Every: 1 Years

Action Notice: 0 Days

☒ Send Email Notification

User
Chris Domenico

+ Add Line

We will pretend this is 2018

Save

Reviewing and Approving the Document

Task

Look up the newly added document and approve it.

5 minutes

Instructions

- Click on Master Data > Documents
- Click on the Actions tab
- Find the document just added and click on the link under Action Required labelled “Awaiting Review ([Your Name])”

DashboardRiskManagementPRP ControlMonitoringMaster DataUtilities

Documents

Add Document

DocumentsActions (47)Reports

Documents

Employees

Products & Materials

Categories

Contacts

Items

Tests

No.	Date	Name	Version	Folder	Action Required
51	02/08/17	Tax Form 1040	1	Forms	Awaiting Review (Braden Snapp)

Reviewing and Approving the Document

Instructions

- Preview the document by clicking on the magnifying glass
- Click on Accept to accept the changes after the document has been reviewed.
- Repeat to Approve

AcceptReject

Type	Added By	Last Updated By
Documents	Safefood 360 Support User	Braden Snapp


Forms

188.00 KB

1

Fred Johnson

Awaiting Review (Braden Snapp)

Version	File Name	Status	Audit Log
1	f1040.pdf	 Awaiting Review	02/08/17 07:52 - Document status changed to Awaiting Review 02/08/17 07:52 - Added By Braden Snapp

One Year Later...



Document Control and Review with Safefood 360°

Completing the Document Review Record

Task

One year later the document is up for review. Complete the review record.

10 minutes

Instructions

- Go to Master Data > Documents
- Click on the Actions tab
- Click on the link to the Tax Form 1040 “Awaiting Document Review”
- Complete the review and accept that the document is still valid.

DashboardRiskManagementPRP ControlMonitoringMaster DataUtilities

Documents

Add Document

DocumentsActions (46)Reports

No.	Date	Name	Version	Folder	Action Required
42	02/08/17	Tax Form 1040 (42)			Awaiting Document Review

Completing the Review Record, Continued

Instructions

- Notice, the record opens in the Management Center
 - Control click on the Document to open in a new tab
 - Review that document as before to verify that it is still OK
 - Fill in the dates and name of person completing the task
- Complete the response and any comments
 - Click on Replace IF the document is not up to standards and upload the new one.

DashboardRiskManagementPRP ControlMonitoringMaster DataUtilities

Document ReviewMan

OPEN - Awaiting Document Review

No.	Date	Name	Document
42	02/08/17	Tax Form 1040 (42)	Tax Form 1040

Document Review

Date02/08/17

NameTax Form 1040

Reason for ReviewScheduled

Next Review02/08/18

Completed By

Checklist

Document

Tax Form 1040

(Replace)

Requirement	Response	Comments / Observations
Does the document and the information contained meet the requirement?		

Add Line

Save

Save & Submit

Tips & Tricks

- ➔ Use the magnifying glass to preview the document in the browser instead of always downloading.
- ➔ Version numbers ONLY move to the next number when it is approved.
- ➔ Set the scheduler for documents that need a regular review. These appear as separate records.
- ➔ Approvers and Reviewers are not always needed. Don't control just because you can.
- ➔ When uploading a document for the first time, any version number can be entered.
- ➔ Any link to a document in Safefood 360 will automatically have the most recent APPROVED version.
- ➔ Embed Docs in Monitoring, Cleaning Programs, HACCPs, and other locations for easy access by users.