



3iVerify User Manual

Document Distribution

Printed on	Issue No.	Issue Date	Review Date	Creation Date	Document Author	Document Approval	Document Ref.	Page
Feb 28 th 2018	1.0	Feb 28 th 2018	Feb 28 th 2019	Feb 28 th 2018	Gwyneth Robertson Operations Manager	James Flynn Director	DocDistribution	1

About 3iVerify

3iVerify is a cloud-based Supplier Compliance Management system that automates time consuming, laborious Supplier compliance monitoring tasks. The system does this by enabling any type of Questionnaire / Assessment to be sent to Suppliers for them to complete and upload information about the Supplier, their food safety and quality systems and their raw material and product information. It helps you verify their claims about food safety and quality and provides a documented record of this with a full audit trail. The data entered into the system by both parties has integrity built in, as each party cannot edit the other party's information. This helps ensure that the information originates from the source that is making the claim. 3iVerify also provides tools for risk assessing the information that comes from Suppliers and ensures that robust due diligence and verification processes which stand up to regulatory and food safety and quality standards are in place. The system also provides easy ways to share information with others, such as regulatory bodies and customers, so that all supporting documentation can be viewed by those with whom the user or the Supplier wish to share it.

About this User Manual

This User Manual is intended for the use of Customers and Users of 3iVerify, so they can quickly gain an understanding of how the system works. Because 3iVerify is highly customisable and is developed iteratively, some of the screens in this document may look slightly different to the latest version of the system. Please ensure that you are using the latest version of this document. You can request the latest version by contacting us at support@primority.com.

For more information about 3iVerify please visit www.3iVerify.com.

Supported Web Browsers

3iVerify is an HTML 5 compliant system and supports the latest version of Google® Chrome® and Microsoft® Internet Explorer® / Edge®. It should perform satisfactorily on the latest versions of all other HTML 5 compliant web browsers, but we do not guarantee this. We recommend that you always work on the latest version of the above web browsers for best results.

Internet Connection

As 3iVerify is a cloud-based solution you will require a fast internet connection for best performance.

Conventions in this User Manual:

Entity Names: These are data entities like Supplier, Customer, and any data that is saved or stored in the system and these will be Capitalized to make them stand out.

On Screen Text: Where on screen text, or messages are referred to these will be quoted in “double quotation” marks.

Tips: Any tips we recommend are highlighted in a yellow box like this one.

Printed on	Issue No.	Issue Date	Review Date	Creation Date	Document Author	Document Approval	Document Ref.	Page
Feb 28 th 2018	1.0	Feb 28 th 2018	Feb 28 th 2019	Feb 28 th 2018	Gwyneth Robertson Operations Manager	James Flynn Director	DocDistribution	2

Document Distribution

3i Verify features a comprehensive document management solution which allows users to upload and manage documents under strict document-controlled conditions required by global food safety and quality standards and by food safety regulators.

Document control: In the context of a food safety and quality management system, Document Control can be defined as a secure but accessible method of storing, approving, reviewing, changing and distributing documents needed for the consistent operation of food safety and quality standards.

1. Introduction

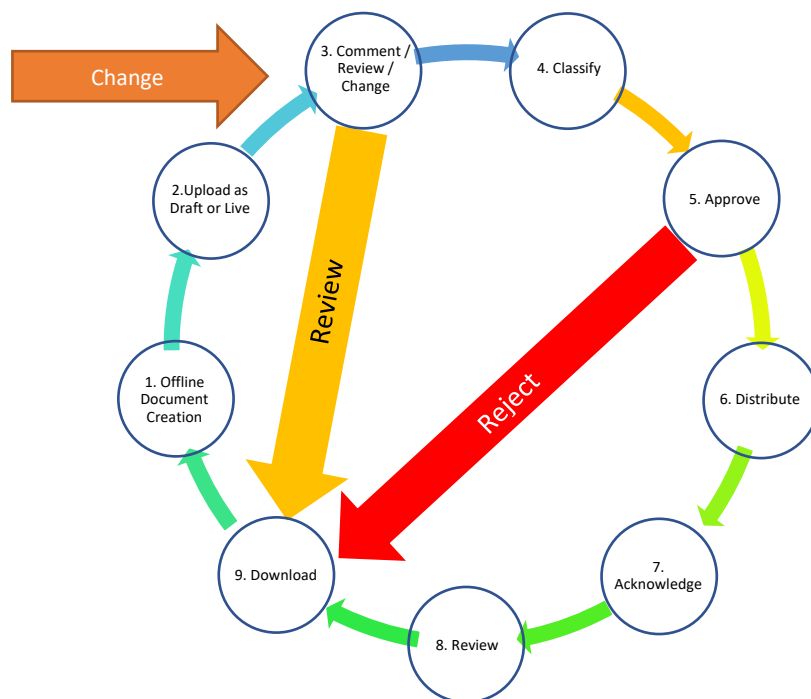
3iVerify allows documents to be uploaded, cross referenced, reviewed, changed, approved and distributed. The documents themselves can essentially be any type of document or file but are usually Microsoft Word, Excel, Adobe PDF or other similar documents. The documents themselves are created offline in the native application, e.g. MS Word, and then uploaded into the system when being proposed as a draft or for approval and distribution. They cannot be edited in the system.

The purpose of this guide is to help the user to understand:

- The document Lifecycle
- What document distribution is
- How document distribution works in practice within 3iVerify

2. Document Lifecycle

The document lifecycle in 3iVerify always starts offline. A document is created and, when ready, uploaded into 3iVerify for comment, change, classification, cross referencing, approval and distribution. This process is illustrated below:

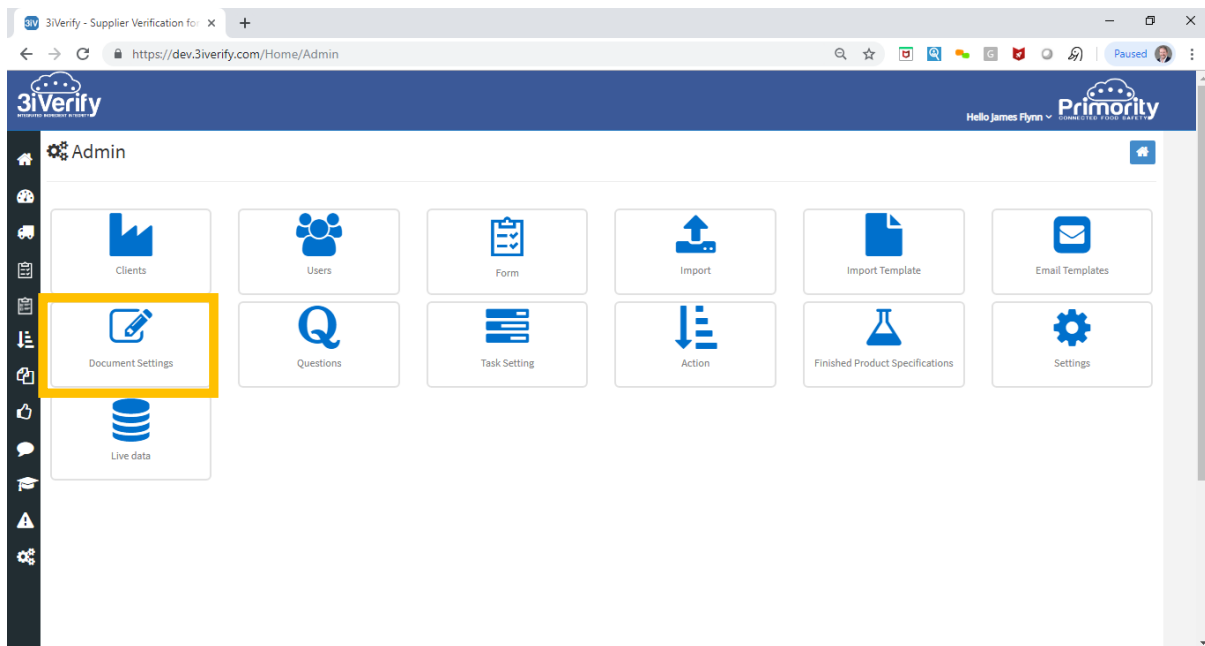


Printed on	Issue No.	Issue Date	Review Date	Creation Date	Document Author	Document Approval	Document Ref.	Page
Feb 28 th 2018	1.0	Feb 28 th 2018	Feb 28 th 2019	Feb 28 th 2018	Gwyneth Robertson Operations Manager	James Flynn Director	DocDistribution	3

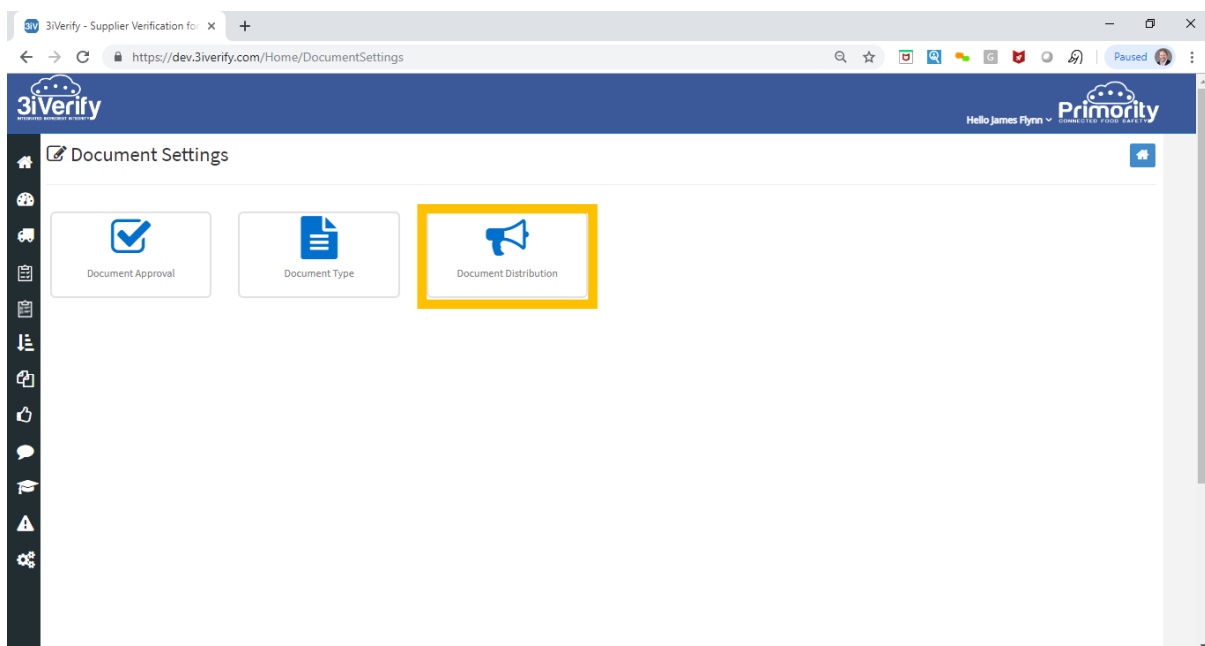
2. Document Distribution and Document Type – Set Up

Documents in 3iVerify are Distributed to other Users in the system by virtue of Document Type. For example, Users who are in the Quality Team will need to be aware of Quality Documents, so we can set up a Distribution List called the Quality Team that is applicable to the Document Type Quality. When we wish to Distribute a Quality Document, we can then select the Quality Team Distribution list and a list of all active Users will be emailed an Acknowledgement Request. They will then sign into 3iVerify, read the distributed document and acknowledge them. A record of the Acknowledgement for each User is then stored against the Document.

To set up a Distribution List go to the Admin area and select Document Settings as shown below:

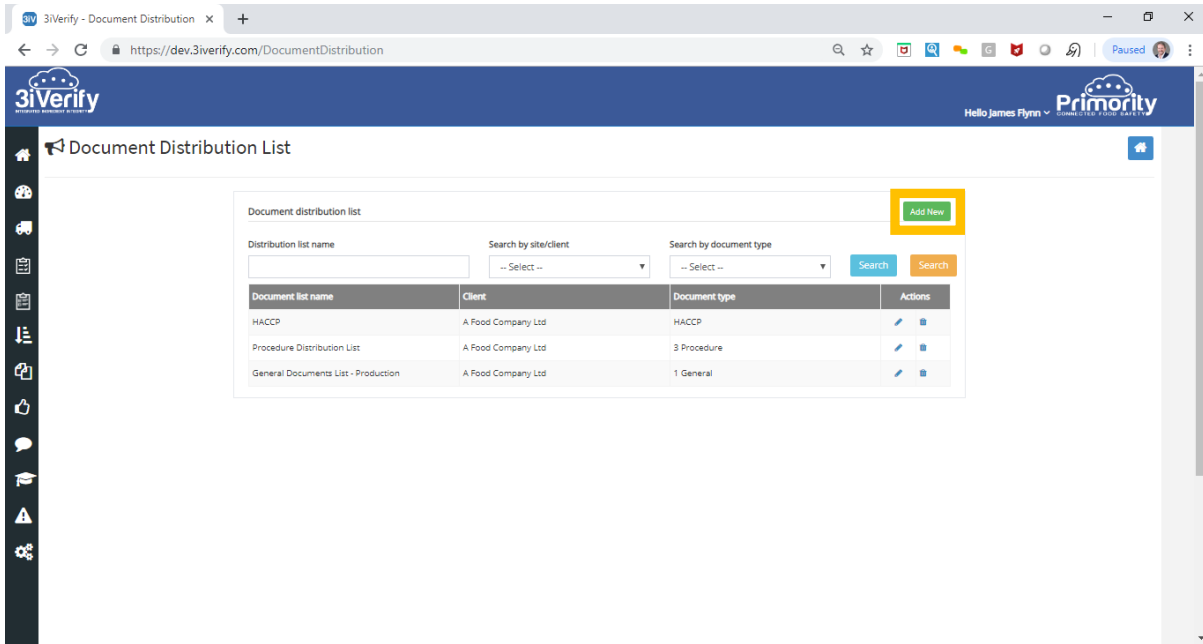


Once Document Settings opens, click on Document Distribution:

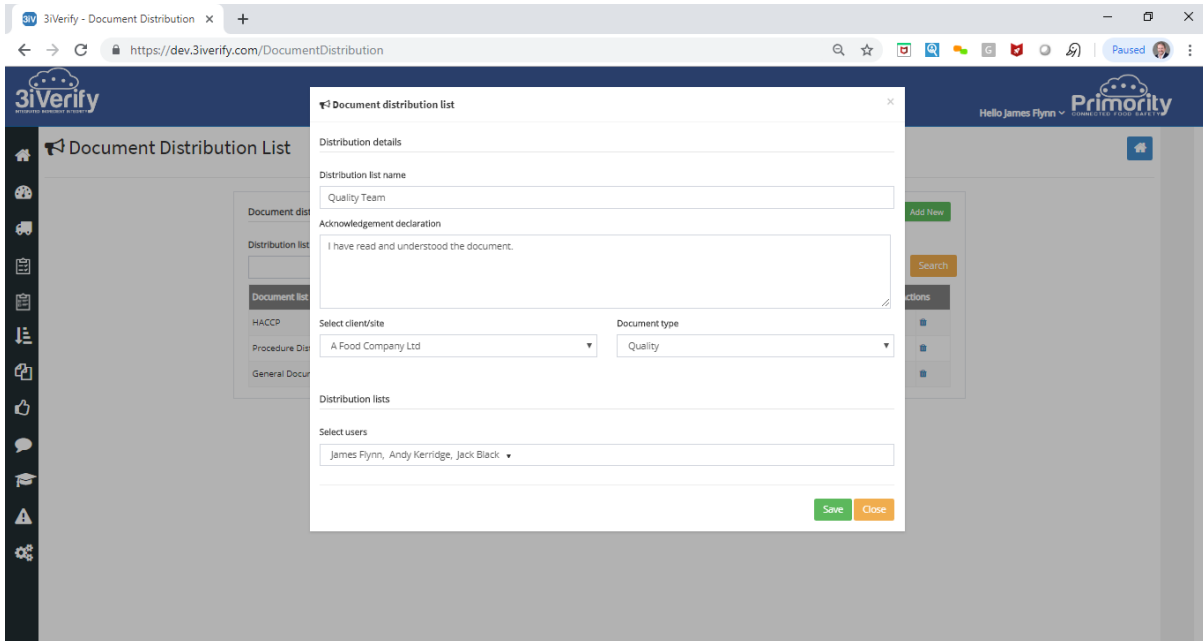


Printed on	Issue No.	Issue Date	Review Date	Creation Date	Document Author	Document Approval	Document Ref.	Page
Feb 28 th 2018	1.0	Feb 28 th 2018	Feb 28 th 2019	Feb 28 th 2018	Gwyneth Robertson Operations Manager	James Flynn Director	DocDistribution	4

At the Document Distribution screen, click the Add New button:



Then, simply select the Site, Document Type, enter a name for the Distribution List and select the list of users as shown below:



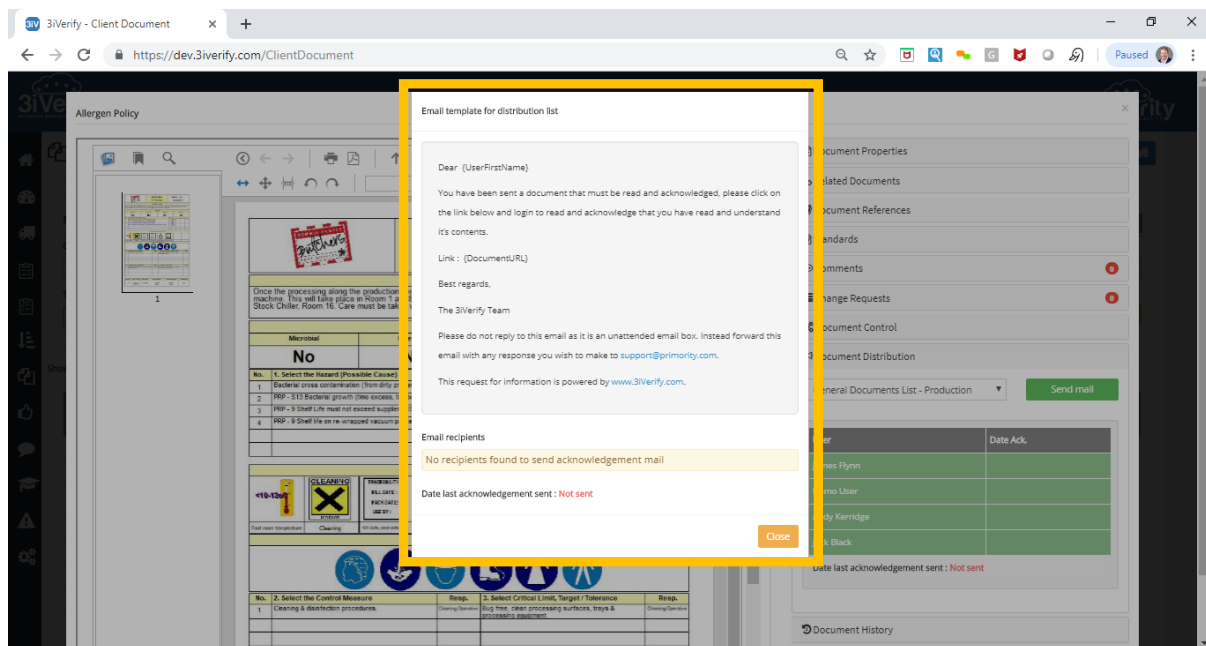
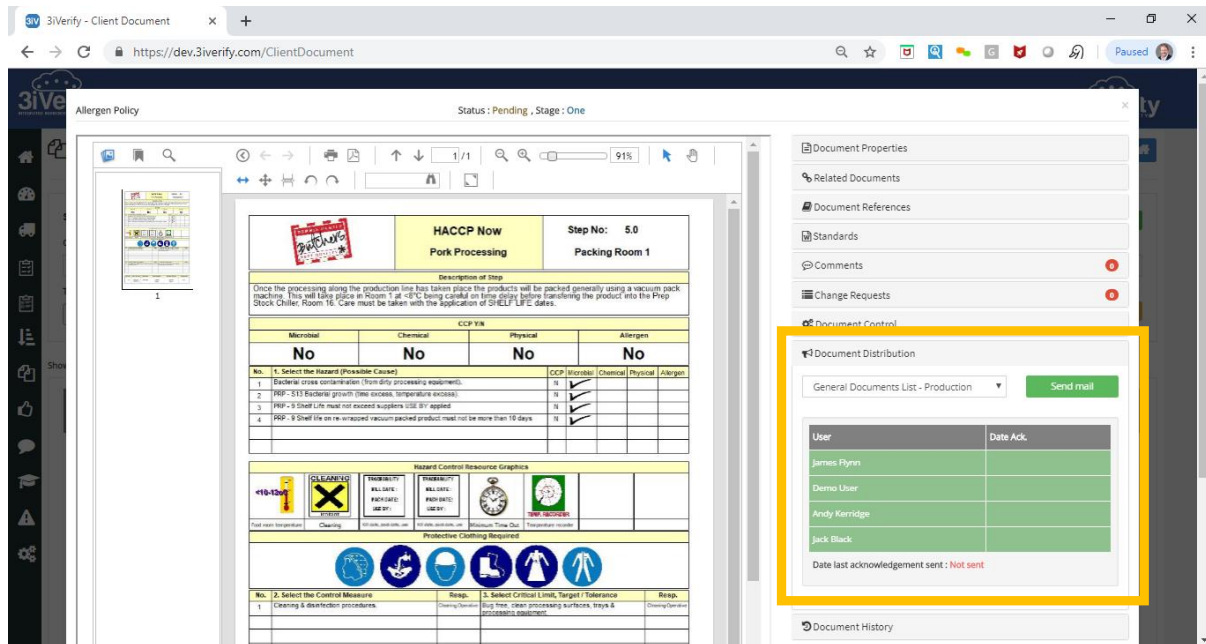
Click Save and the new Distribution List will be available for Documents of the selected Type the very next time you open a Document record and wish to distribute it.

You can enter as many Distribution Lists for each Document Type as you wish, giving you the flexibility to segment those whom you may wish to Distribute documents to. For example, you might enter a Distribution List of “Quality – Senior Management” and “Quality – Supervisors”. This gives a very flexible way to segment groups of people that you wish to distribute documents to.

Printed on	Issue No.	Issue Date	Review Date	Creation Date	Document Author	Document Approval	Document Ref.	Page
Feb 28 th 2018	1.0	Feb 28 th 2018	Feb 28 th 2019	Feb 28 th 2018	Gwyneth Robertson Operations Manager	James Flynn Director	DocDistribution	5

3. Distributing a Document:

To distribute a Document, open the Document you wish to Distribute and expand the Document Distribution area and select the Distribution List you wish to send the Document to, as shown below. Click the Send Email button to see the email that will be sent and the full list of Users on the list. Note that only Users who have NOT already acknowledged the Document will be emailed.



Summary: The set up of Document Distribution is easy and is based on Document Type for a given site. The user can set up multiple Distribution Lists for any Document Type so that User can be segmented in any desired fashion.

Printed on	Issue No.	Issue Date	Review Date	Creation Date	Document Author	Document Approval	Document Ref.	Page
Feb 28 th 2018	1.0	Feb 28 th 2018	Feb 28 th 2019	Feb 28 th 2018	Gwyneth Robertson Operations Manager	James Flynn Director	DocDistribution	6