Guidance on Choosing a Technology Provider

(Revision 1.0)

About This Guidance

The following recommendations include vendor qualification questions and considerations to help your company select the vendor that can best meet your business needs to implement the Produce Traceability Initiative (PTI) for your organization. These recommendations were developed by members of the PTI Technology Working Group at the request of the PTI Leadership Council.

The purpose of this document is to provide a framework for the most productive conversation possible when evaluating and selecting a PTI vendor. The recommendations should not be viewed as a complete list of questions, but rather as a list of sample questions that are intended to guide the discussion as you identify qualified PTI vendors. These questions are divided into four categories: vendor industry experience, technology, operational fit, and support. This document also includes a section on questions you should consider and discuss internally within your organization before engaging potential vendors.

Revision History

This section itemizes the changes from the last published Produce Traceability Initiative Guidance on Choosing a Technology Provider.

Version No.	Date of Change	Changed By	Summary of Change
1.0	12/16/11	Technology Working Group (TWG)	Document created

Internal Considerations Prior to Starting Your Vendor Search

Before your company begins evaluating technology solutions for implementing PTI, it is recommended your organization   ask the following questions and take into account the following considerations.

Questions	Considerations
• Do you need help understanding or implementing the PTI recommendations and GS1 Standards, including GTIN assignment, and customer notifications? • Is your team familiar with the PTI Best Practices and do they have an understanding of what is required to achieve whole chain traceability?	You should have a person within your organization (or a contact) who is familiar with fresh produce business processes and PTI recommendations. This person or contact should also have some understanding of how GS1 Standards work with fresh produce. Many of the PTI working group committee members, (suppliers, retailers, and third party solution providers) are willing to assist or offer advice to those just getting started with their own PTI implementation.
• Are you familiar with printing and applying labels, or using direct print marking?	See *PTI Best Practices for Direct Print* and *Best Practices for Formatting Case Labels* documents on the PTI website.
• Where and when will you be printing your case labels? (i.e. field, shed, office, truck) • Who will apply the labels, and how will they be applied? • Where and when will you be printing your hybrid pallet tags? (i.e. field, cooler) • How will the pallet tags be applied? • Who will apply the tags, and how will they be applied?	If you are planning to print as you pack, you will need a printer fast enough to keep up with your production. You must also consider your printing environment. (cold, wet, etc.) If you are planning to preprint most of your labels, you will need to consider how your crew will maintain accuracy (right labels to the right field) and how your applicator will apply them. Evaluate if you need label rewinders. If you are preprinting a majority of your case labels, you will need to consider how you will deal with unscheduled changes to harvest plans in the field. Ask these questions: Do you need portable printers? Do you ship mostly full pallets or do you ship mixed pallets? If you ship mixed pallets, you will need to consider where the hybrid pallet tag will be printed and applied after the mixed pallet is complete. Do you reconfigure pallets at the time of loading due to trailer constraints? If yes, you may need a hybrid pallet label print station available to reprint pallet labels for reconfigured pallets.

Questions	Considerations
• Do you plan on maintaining your own traceability lot to SKU (stock keeping unit) to a shipment database and program, or will you be using a third party provider database for all areas of PTI? • How will you transmit change information to and from your print areas, or production area?	If you're using a combination of third party and internal systems, consider how activities will be divided and how the various systems and activities will integrate with each other. In either case, think about how you'll get GTIN changes or additions to outlying printers or computers. Bluetooth, WIFI, or Internet portal. If you're using a third party provider, consider what the vendor's service level agreement is, if the equipment should go down during the harvest, especially weekends and holidays. If a third party provider is used, consider if they track by printed label or actual shipment.

Once your company has considered the questions above, it is recommended that you ask the following questions during your evaluation process of potential technology providers.

Vendor Industry Experience

1. Are you a member of:

   ☐ Canadian Produce Marketing Association (CPMA)

   ☐ GS1 US

   ☐ Produce Marketing Association (PMA)

   ☐ United Fresh Produce Association

2. Does anyone from your company participate in the PTI Technology Working Group?

3. Is your software compliant with all published PTI case and hybrid pallet tag labeling standards?

   a. If yes, does your software configure to print batch/lot numbers as well as calculate and print PTI voice pick codes as required on each case label?

4. How many PTI production systems do you have in place?

5. How many PTI pilot projects have you conducted to date?

6. Who are some of your traceability system customer references in the fresh food industry? Ask for references and call the contacts. If possible, arrange for a site visit to see the solution in action).

7. What specifically did you do for these customers?

8. Approximately how long does the implementation process take from start to completion?

9. What percentage of your business is with fresh produce growers, shippers and/or packers?

__Technology__

1. Is the technology you are offering a product or a custom project for you? (Products have support lives, and grow in features. Projects are usually highly customized and may require additional customization charges for updates/changes.)

2. Do you design and develop your own traceability software or is the solution you are offering from a third party?

3. What components of the solution do you provide directly? (hardware, software, services, etc.)

4. Who provides the components that you do not get directly from the third party?

5. Who do you work with if there are issues with any of the components?

6. If you are a software provider, does your software only work with specific hardware?

7. Does your solution integrate with my accounting system or existing solutions? If so, what information is exchanged?

8. When was the last update release of your software? When is the next anticipated release?

9. When was the last update release of your hardware? When is the next anticipated release?

10. How does your software provide trace back and trace forward reports?

11. Can you give me a demonstration of your software?

Operational Fit

1. Can your solution handle the entire span of the traceability needs of my organization? Are there any "manual" steps in the traceability chain?

2. Does your solution have all the "must have" features for traceability?

3. Do you offer any additional features that provide value beyond labeling?

4. Do you have solutions that will work for my grower/supplier/shipper partners who will be labeling for me?

5. Will I be able to print labels in the field, packing shed, or office with your solution

6. Will I be able to handle multiple pack configurations on the same pack line or field pack crew with your solution?

7. How is GTIN information provided to your solution for printing on the cases and/or pallet labels? (spreadsheet import, manual entry, other)

8. What are the different methods to get the case information onto the case? (manual print and apply, in-line print and apply, direct marking, etc.)

9. Will our company be able to print additional information onto the label if needed?

Support

1. What does your training program include?

2. What support services and materials do you offer? (time and materials, service agreements, other)

3. What is your standard service level and response time to service requests for your software/hardware?

4. What is covered under your software/hardware support agreement?

5. What is covered under the standard warranty?

6. What are the locations of your service centers and technical staff?