

**HOW PERFORMANCE-DRIVEN PROCUREMENT GETS RESULTS**

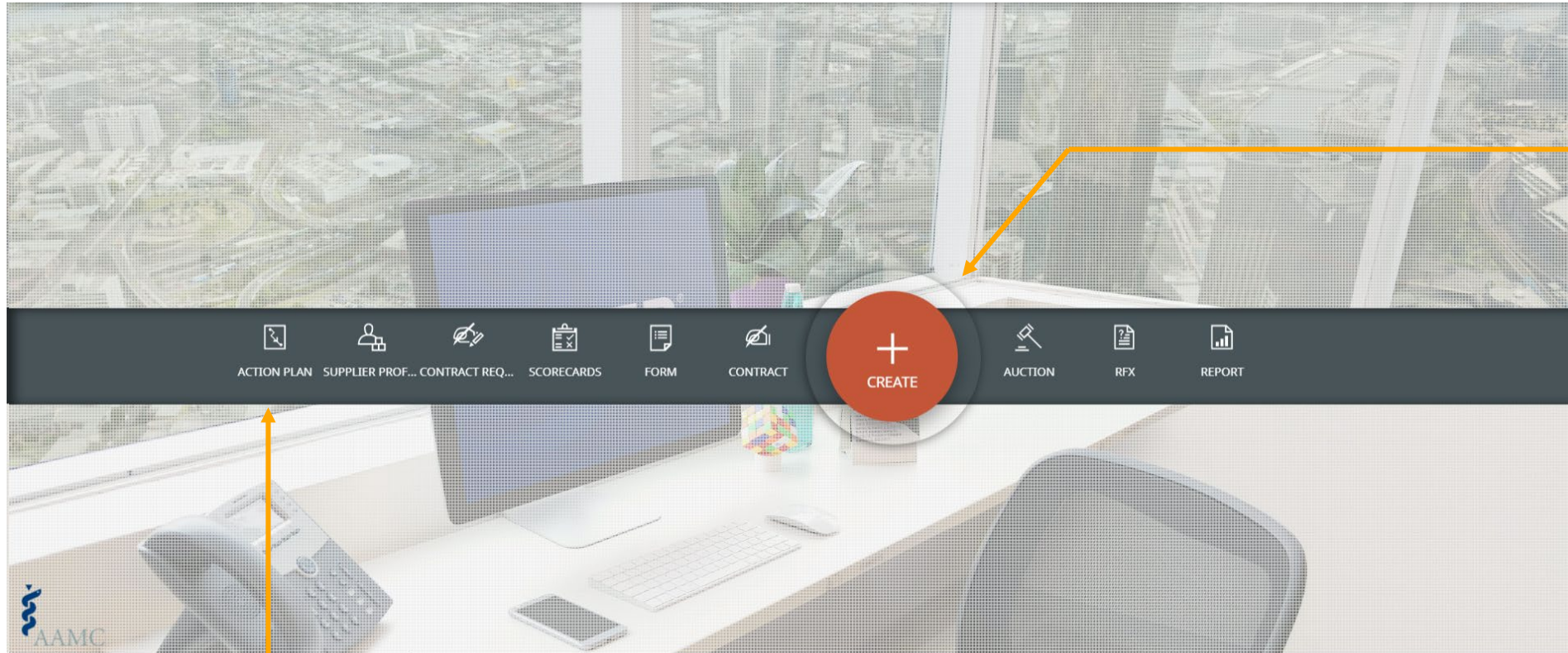
# **Action Plan**

**Quick Reference Guide**

**THE INDUSTRY'S LEADING SOURCE-TO-PAY PLATFORM**

Action plan allows you to easily create and implement an action plan for a supplier. You can create milestones to track your action plan and send notification to suppliers. This will help you track the supplier for the task assigned. These may be anchors where you can view the end date, assigned to, status, activities and so on.

You can create an action plan as follows:



1. Click **Create** to open the cross-bar menu.

2. Click **Action Plan**.

Initially, the Action Plan document with only the Setup tab is displayed. Capture the basic details on the Setup tab and save the document. After you save the document, additional tabs – Suppliers, Milestones, and Notifications are added.

New Action Plan (Draft)

**Setup**

Some Basics to get started...

Name of the Action Plan is\*

Name of the Action Plan is

Objective of the Action Plan is\*

Objective of the Action Plan is

Completion Date

M/d/yyyy

Category [Change](#)

No Category Selected.

Organization Entity [Change](#)

No Organization Entity Selected

Regions [Change](#)

No Regions Selected.

Allow Suppliers to respond after end date

[Save](#)

Once you have added all required details, click **Save**.

On the Suppliers tab, capture the suppliers with whom you want to share the action plan.

**Demo AAMC (Draft)** Publish

**SUPPLIERS** Setup **Suppliers (2)** Milestones (0) Notifications

Search

- Dyson GEP
- IBM GEP
- GEP Supplier
- AAMC supplier 1
- HumRRO-Human Resources R...
- Liaison International LLC
- University of Illinois C...
- Blessing White Inc
- Identropy Inc
- JW Marriott Austin

**Associated Suppliers**

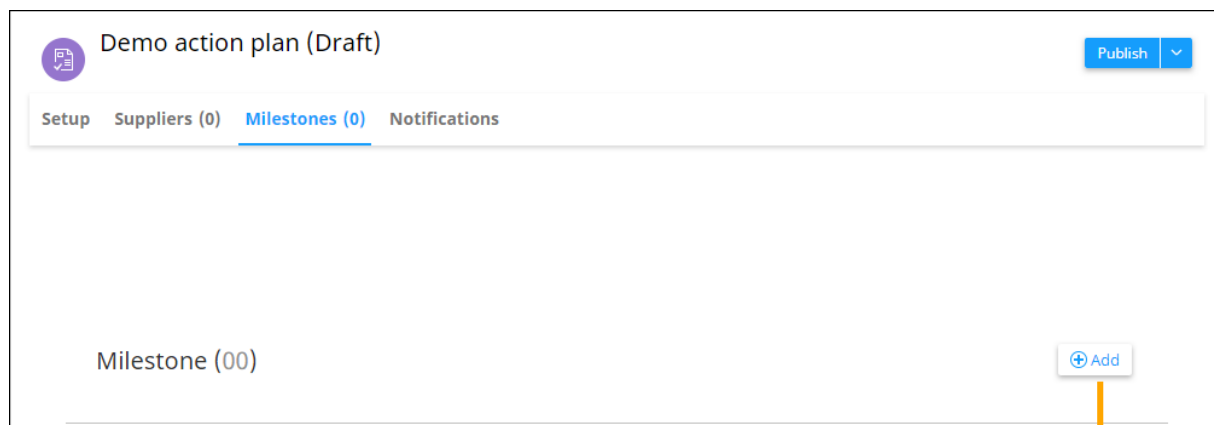
| Name                                          | Supplier Contact                                                                 |
|-----------------------------------------------|----------------------------------------------------------------------------------|
| Dyson GEP<br>Not invited                      | James Dyson<br><a href="#">Vibhanshu.Singh@Gep...</a> <a href="#">Change</a>     |
| AAMC supplier 1 <span>✖</span><br>Not invited | AAMC 1 supplier<br><a href="#">Vibhanshu.Singh@Gep...</a> <a href="#">Change</a> |

**Select the required suppliers and click Add**

**Select the required supplier contact**

**Remove the supplier**

On the Milestones tab, click **Add** to add milestones.



On the Add New Milestone pop-up, fill in the required details such as the milestone name, description, due date, assignee, and attachments (if any). Click **Save** or **Save & Add New** to save the milestone and add another one.

A screenshot of the 'Add New Milestone' pop-up window. It features a title bar with a close button. The form contains two main sections: 'Milestone Name\*' with a text input field, and 'Milestone Description\*' with a rich text editor. The rich text editor includes a toolbar with icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, image, table, link, unlink, and print. Below the toolbar are dropdown menus for 'Styles', 'Format', 'Font', and 'Size', followed by color selection buttons. At the bottom right, there are two blue buttons: 'Save & Add New' and 'Save'.

Existing/added milestones are displayed on the Milestones tab, as shown below:

Demo action plan (Draft) Publish

Setup Suppliers (0) Milestones (0) Notifications

Milestone (01)

Milestone 1  
Description

Activities (00)

Edit Delete Add

2/12/2018  
Assigned To:

Add

Select the milestone to made modifications to it

Edit or delete the selected milestone.

Edit or delete the selected milestone.

Add an activity within the milestone



The Notifications tab enables you to set up email notifications to be sent to the concerned parties.

**Click Add Notification**

**Fill in the required details and click Save**

Demo action plan (Draft) Publish

Setup Suppliers (0) Milestones (1) **Notifications**

No Notification Available.

**+ Add Notification**

**Notification Details**

Name\* Template Name Status\*

Name Select Template  Off

Send Notification as\*

Email

**When to send a notification alert?**

Alert\*

On Select Alert

After filling in all the required details on all the tabs, you can publish the action plan using the option provided on the top-right corner.

The screenshot displays the 'Demo AAMC (Draft)' action plan configuration page. At the top right, a blue 'Publish' button with a dropdown arrow is highlighted by two yellow callout boxes. The upper box is labeled 'Delete the action plan' and points to the dropdown arrow. The lower box is labeled 'Publish the action plan' and points to the 'Publish' text. Below the 'Publish' button is a 'Save' button. The main content area includes tabs for 'Setup', 'Suppliers (2)', 'Milestones (0)', and 'Notifications'. The 'Setup' tab is active and contains the following fields: 'Name of the Action Plan is\*' with the value 'Demo AAMC', 'Objective of the Action Plan is\*' (empty), 'Completion Date' with a date format 'M/d/yyyy', and three selection groups: 'Category' (Grants, Procurement), 'Organization Entity' (AAMC), and 'Regions' (All). A checkbox 'Allow Suppliers to respond after end date' is checked.



After the action plan is published, as an assignee for a milestone, you can change the status of the milestone and activity assigned to you, to indicate them as achieved.

The screenshot shows the 'Update Procurement Details' page. At the top right, there is a clock icon and the date '1/13/2017'. Below this, the 'Assigned To' field is empty. The current status is 'To be Achieved' with a 'Change' link next to it. A 'Change Status' dialog box is open, showing three radio button options: 'To be Achieved', 'Achieved' (which is selected), and 'Achieved on:'. At the bottom of the dialog is an 'Update' button.

Click **Change** to update the milestone status

Select **Achieved**, provide Achieved on date, and click **Update**

The screenshot shows the 'Update Procurement Details' page. At the top right, there is a clock icon and the date range '1/12/2017 - 1/13/2017'. Below this, the 'Assigned To' and 'Evaluator' fields are empty. The current status is 'To be Started' with a 'Change' link next to it. A 'Change Status' dialog box is open, showing three radio button options: 'To be Started', 'In progress' (with a '0' next to it), and 'Completed' (which is selected). At the bottom of the dialog is an 'Update' button.

Click **Change** to update the activity status

Select the required option and click **Update**.

If the activity approval workflow is set up, then as an approver of an activity, you decide whether to approve or reject the status change made to the activity.

Milestone (01) Activity Status All Edison Ltd [Change]

Update Procurement Details 0

Update Procurement Details 1/13/2017

Assigned To:

Status: **To be Achieved**

3 Complete the Action Plan Smart

Activities (01)

Update Procurement Details 0

Update Procurement Details 1/12/2017 - 1/13/2017

Assigned To:

Evaluator:


Status: **Completed**

Accept Reject

Evaluation Status: **Approval Pending**

Accept or Reject the activity status change

After the action plan is published and supplier responses are received, click **View Response** on the top-right corner to view the responses.

 Demo AAMC

[Version History](#)

View the version history of the action plan

Objective

Test

Category

Not Applicable

Organization Entity

Not Applicable

Regions

Not Applicable

Milestone (01) Activity Status All


[Dyson GEP](#) [\[Change\]](#)

Select the required supplier to view their responses

Demo\_AAMC

Demo



 No comments available

 2/22/2020

Assigned To: V

Status: [To be Achieved](#) [Change](#)

[Activities \(00\)](#)