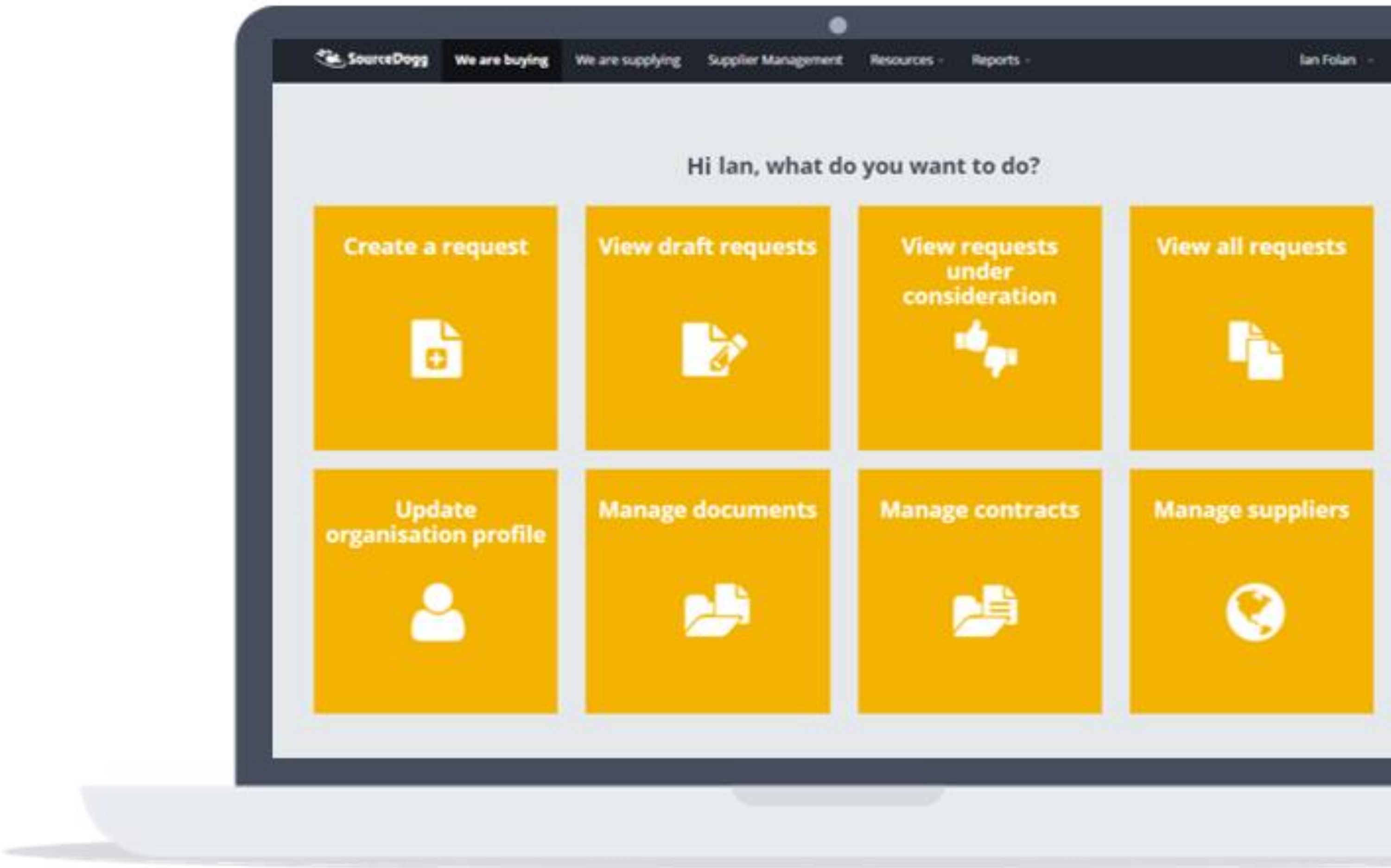
Action Plans



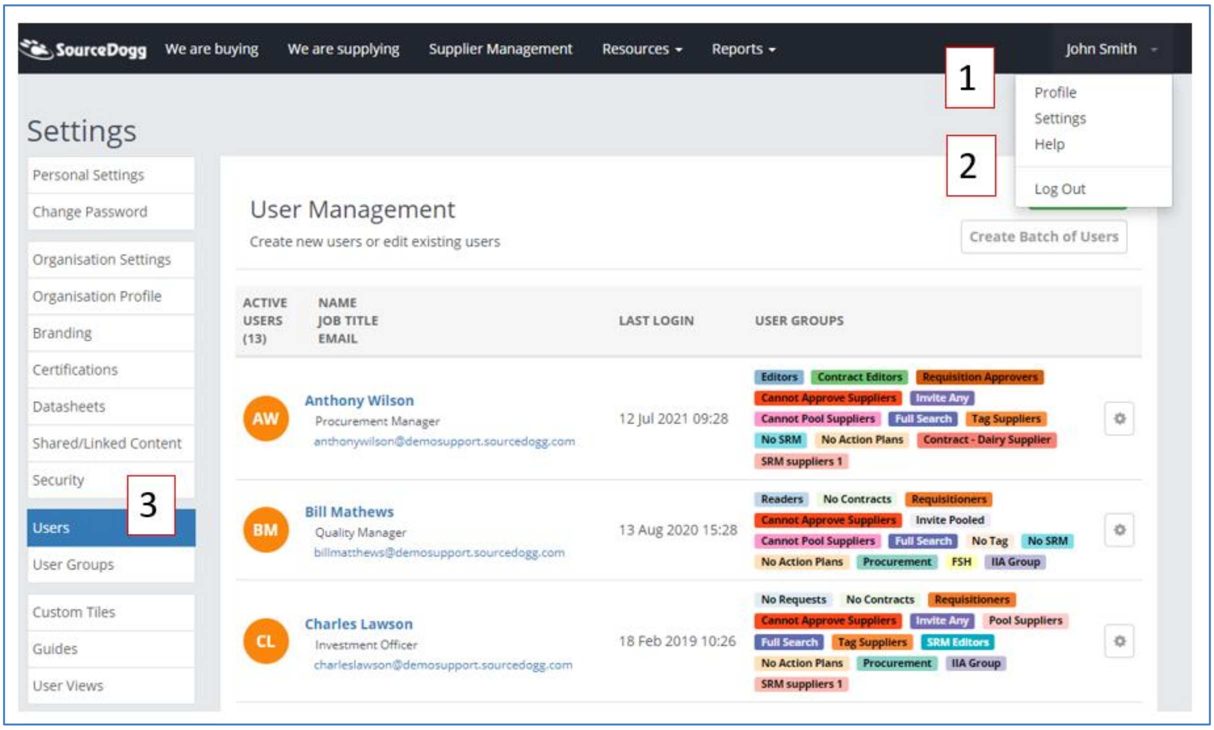
Contents

Introduction

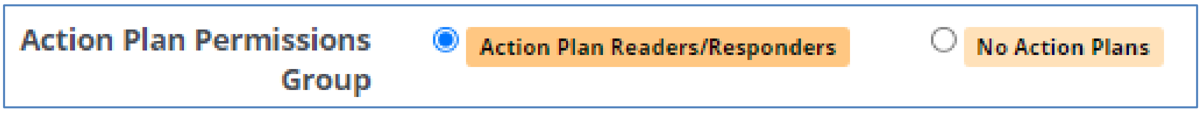
The Action Plans module in SourceDogg is for Buyers to highlight to you, any issues they have had with your product/service. It will help you find the root cause of a problem, devise a short-term fix and implement a long-term solution to prevent recurring problems. It may also be used in the absence of any issues to highlight a roadmap of potential improvements and collect information on progress over time. It is a Record that you can fill out in different stages each with different timescales. The Buyer can then decide, based on their satisfaction with what you have provided, to close off the Action Plan or return it to you for further work.

Action Plan Permissions

The Action Plans module is not active on your account by default and must be activated by adjusting your Action Plans user permissions. Account administrators can control the permission levels for existing and new Users through each User's settings in the '[Users](#)' tab of your Settings area. These can be found when you click on your name in the top right corner (1) followed by 'Settings' (2) and then the 'Users' tab (3).



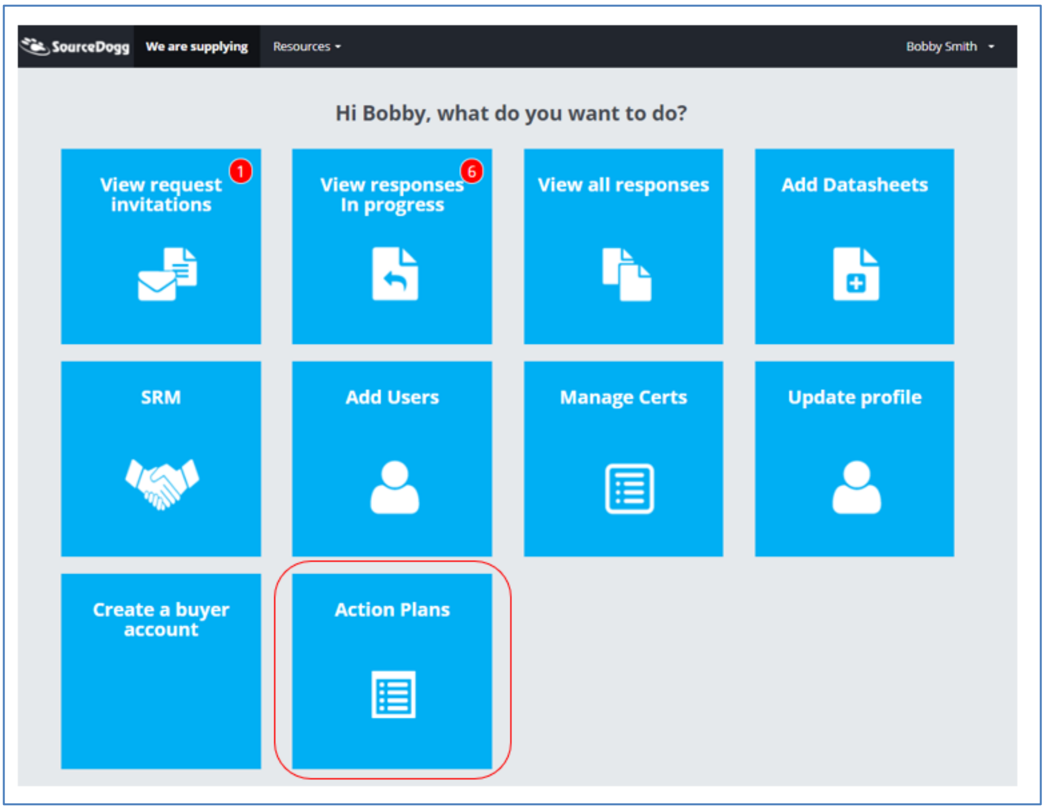
To give any of your Users access to the Action Plans module just click on their name and change the Action Plan Permissions Group setting from ‘No Action Plans’ to ‘Action Plans readers/Responders’.



Note that once you give a user “Action Plan Readers/Responders” permission, they will be able to access all Action Plans in your account.

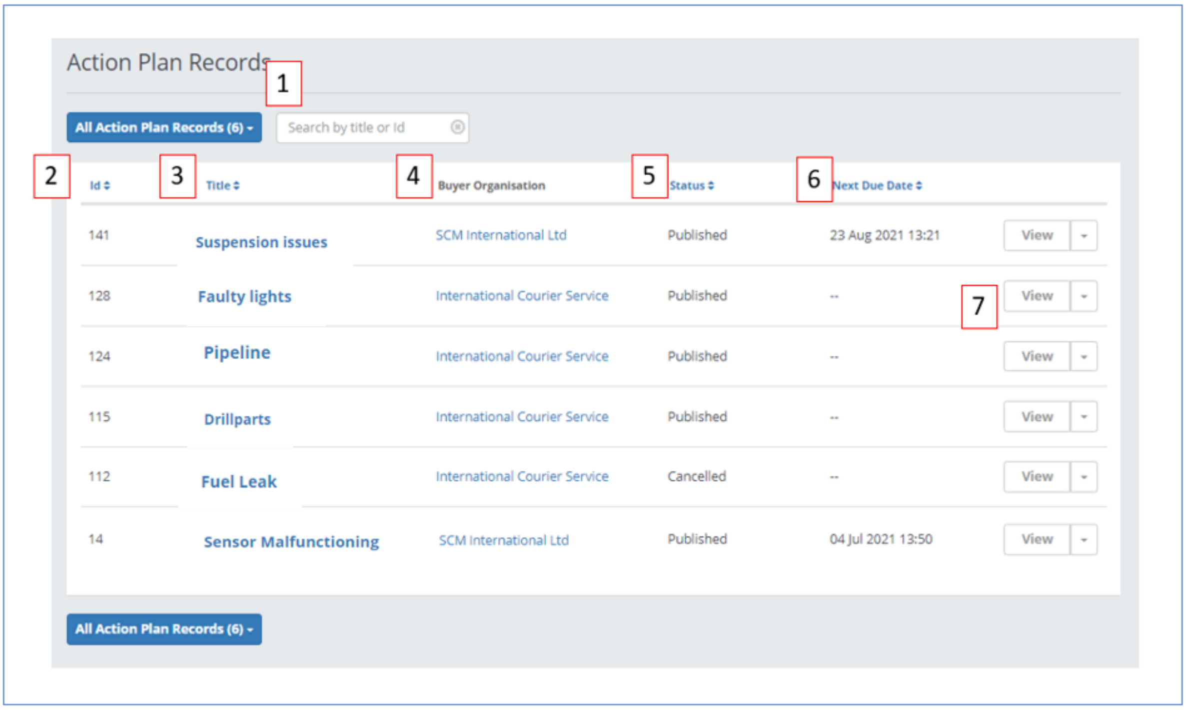
Where to find Action Plans

The Action Plans module can be found on your SourceDogg homepage by clicking on the blue ‘Action Plans’ tile.



Action Plan Records

This is where you access the Action Plans you have been sent from any Buyers on SourceDogg.

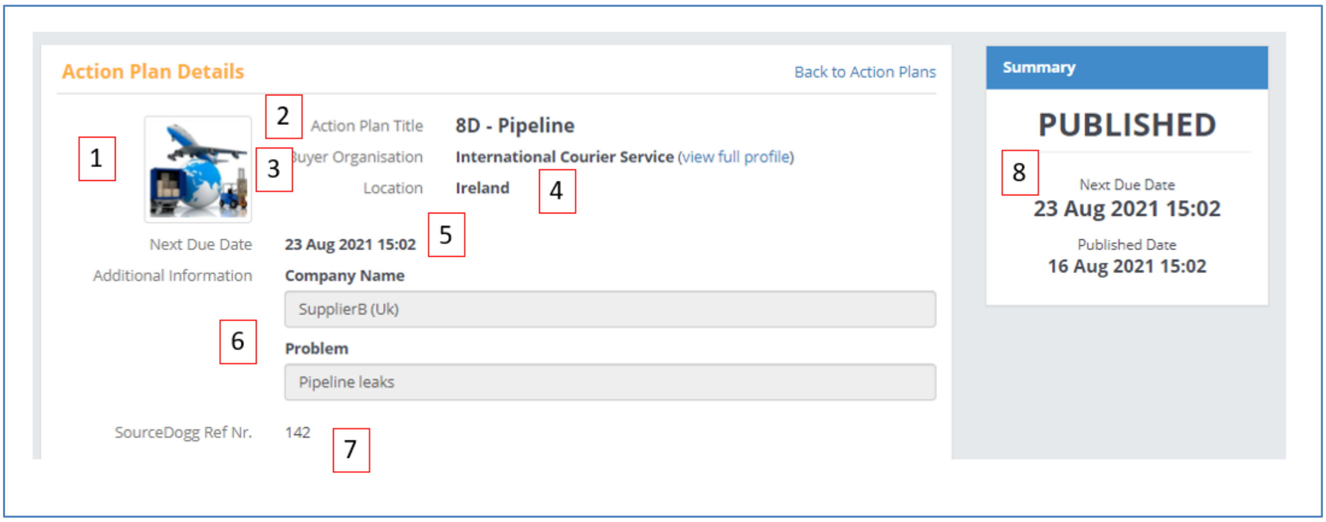


1. You can **filter** the Action Plan Records by their various stages (New, In Progress, Pending Approval, Closed or Cancelled) by clicking on the dropdown or you can **search** by typing the Action Plan Title or ID number in the search box.
2. **ID** – Each Action Plan Record has a unique ID number. You can change the order they are displayed in by clicking on this.
3. **Title** – The name the Buyer has given the Action Plan Record. You can change the order they are displayed in by clicking on this.
4. **Buyer Organisation** – The name of the Buyer that has issued the Action Plan Record to you.
5. **Status** – This tells you whether the Action Plan is Published, Closed or Cancelled. You can change the order they are displayed in by clicking on this.
6. **Next Due Date** – This is the date the next Section of an Action Plan is due to be returned to the Buyer. You can change the order they are displayed in by clicking on this. Deadlines are guidelines. You can submit before or after a deadline has passed.

7. **View** – Clicking this will open the Action Plan.

Action Plan Details

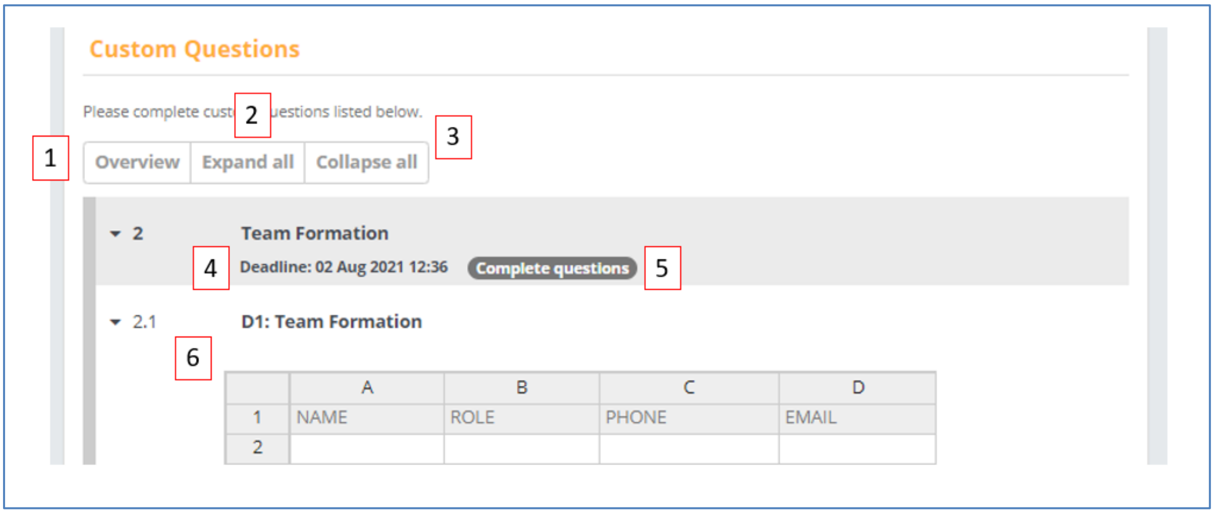
These fields contain information supplied by the Buyer and require no input from you.



1. This is the Buyer's **logo**.
2. **Action Plan Title** - The name the Buyer has given the Action Plan Record.
3. **Buyer Organisation** – The Buyer's name. Click on 'view full profile' to find out more about the organisation.
4. **Location** – The country the Buyer is located in.
5. **Next Due Date** – This is the date the next Section of an Action Plan is due to be returned to the Buyer.
6. **Additional Information** – These fields are unique to each Action Plan a Buyer issues but may be used to issue information detailing the fault of the product/service. The Buyer can update these over time. If they do it will be labelled with "Edited".
7. **SourceDogg Ref Nr.** – This is the unique ID number that each Action Plan has.
8. **Summary** – This will tell you the **status** of the Action Plan, the **date the next section is due** to be returned to the Buyer and the **date the Action Plan was issued**.

Custom Questions

These are the questions you complete before submitting your response.

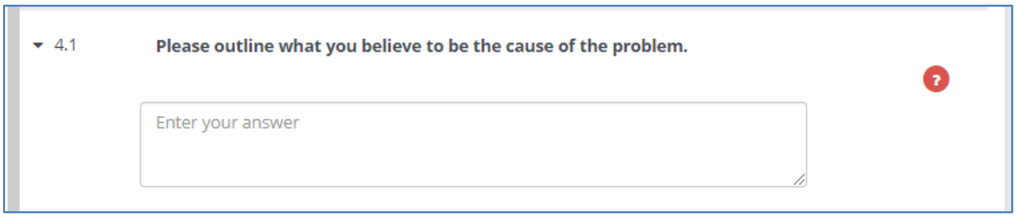


1. **Overview** – Clicking this will open the Sections and show you the titles of the questions.
2. **Expand all** – This shows you the open Sections and full questions within them.
3. **Collapse all** – This changes the view to just the Section titles.
4. This is the **Section name** and its **Deadline**. Please note this is not a hard deadline and you can still answer the questions and submit after it has passed.
5. This shows you the **status** of the Section, it can be ‘Complete Questions’, ‘Needs more work’ or ‘Approved’.
6. When the Section has been opened here you will see the **questions** the Buyer has asked you to complete.

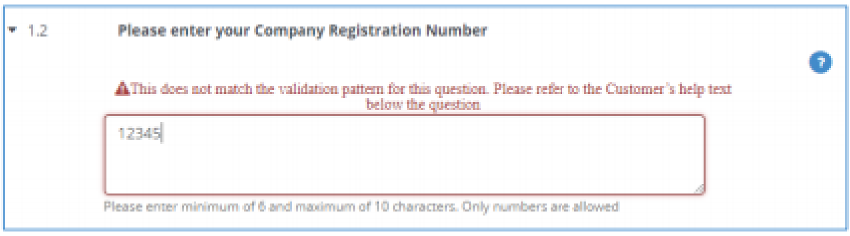
There are 3 question types the Buyer can use – Freetext, Document and Matrix. If any are marked with a red question mark that means they are mandatory to complete before submitting your response.

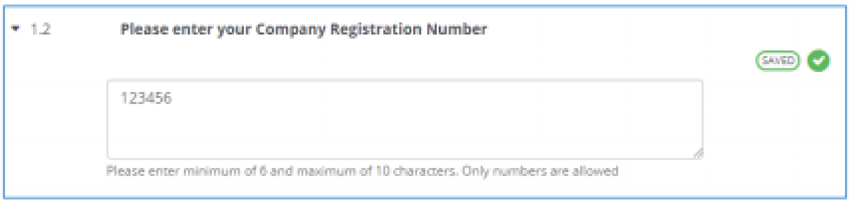
Freetext

'Freetext' question allows you, in a 'block of text', to type in any information required by the Buyer.



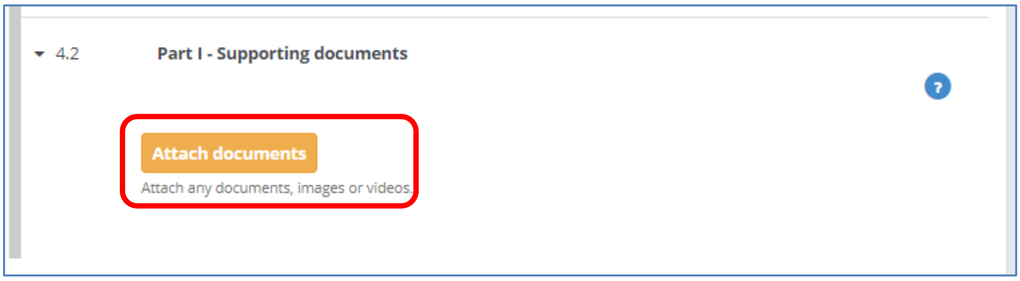
If you see some helptext below the answer box this means the buyer has imposed a validation pattern meaning they want your answer is a predetermined format. Common examples include a date, email, VAT number and others. If you do not conform to the format then the box will be circled in red and you cannot submit an answer, the box will turn blue when there is an acceptable answer (please see below for examples of both). Please do not use spaces and to confirm there are no spaces present it is advised not to copy and paste your answer in or use the tab or Enter keys.



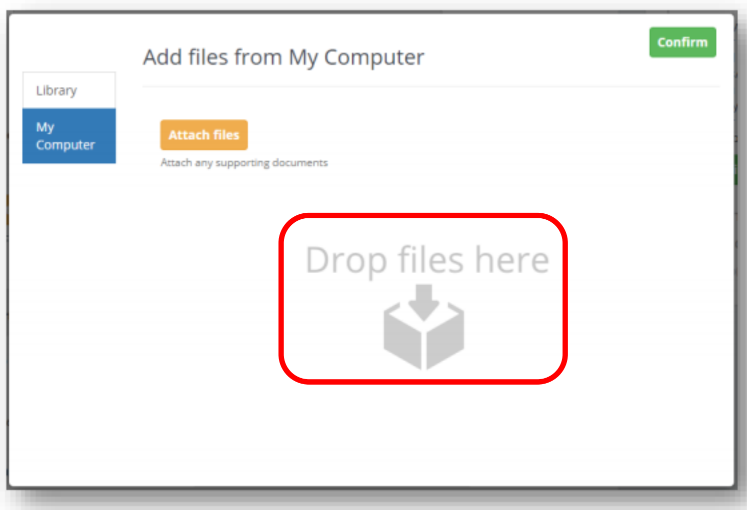


Document

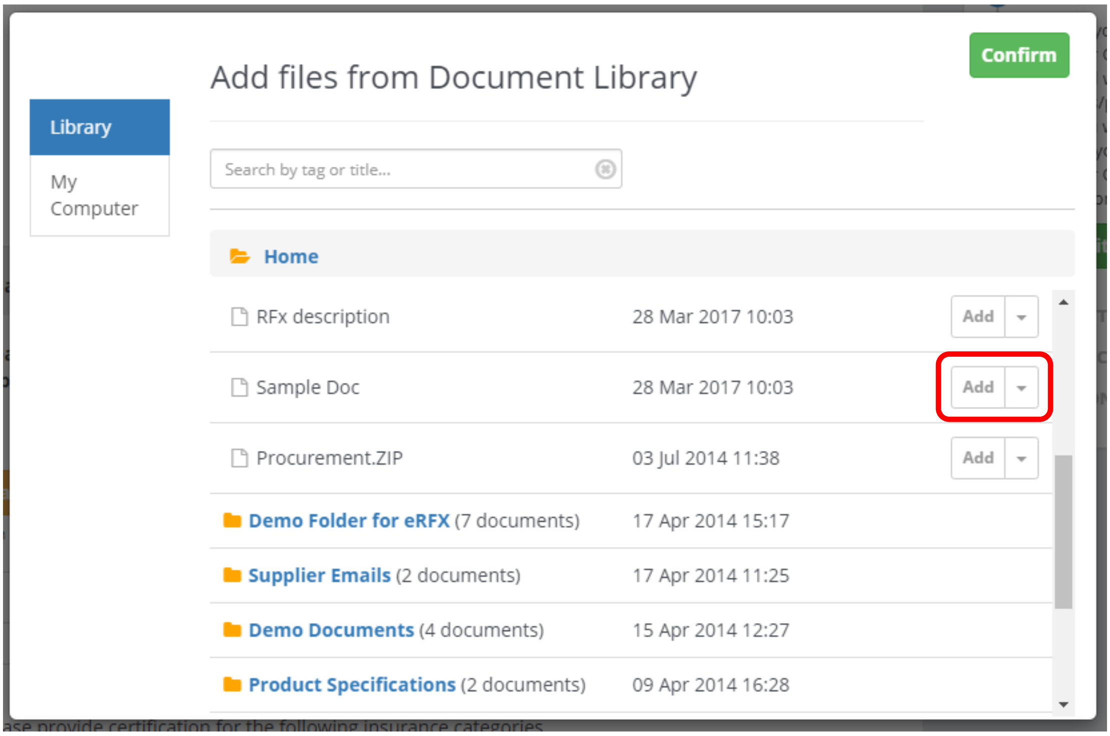
The 'Document' question allows you to upload multiple files from your computer or your SourceDogg 'Document Library' – your private online storage on SourceDogg.



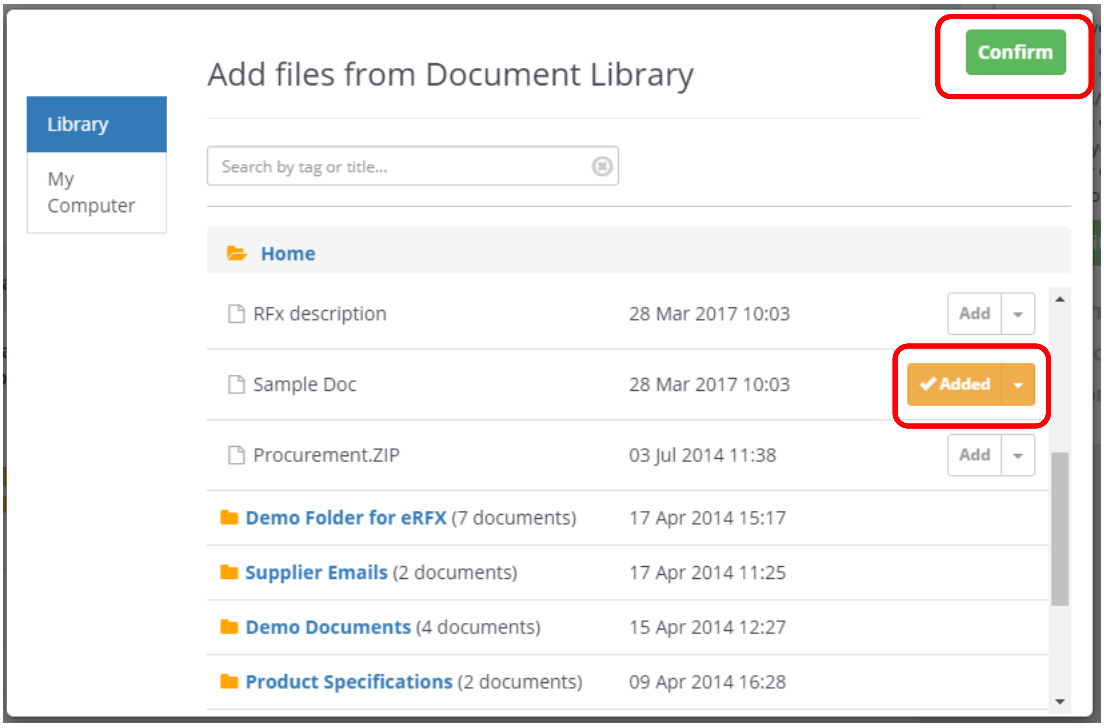
To upload a file, simply click ‘Attach documents’ button. The pop-up window will appear and you will have the option to select files from ‘My Computer’ or ‘Library’. You can also ‘Drag and Drop’ by clicking on a file and drop it into the ‘Drop files here’ box.



To attach files from your SourceDogg ‘Document Library’ simply select ‘Library’ on the top left corner of the popup window. This will show folders created in ‘Document Library’ and files previously uploaded into the Library. Click on ‘Add’ button next to the chosen file. This will add chosen file into the question.

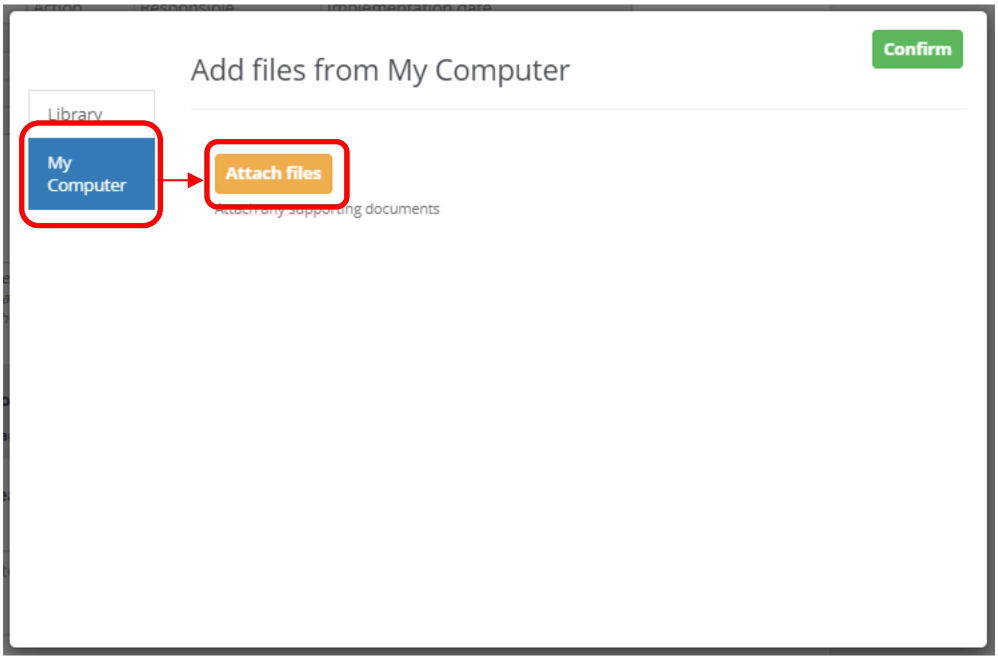


Once you click 'Add' button, it will turn into the orange 'Added' button. Click on 'Confirm' in the top right corner to complete the file upload into the question.

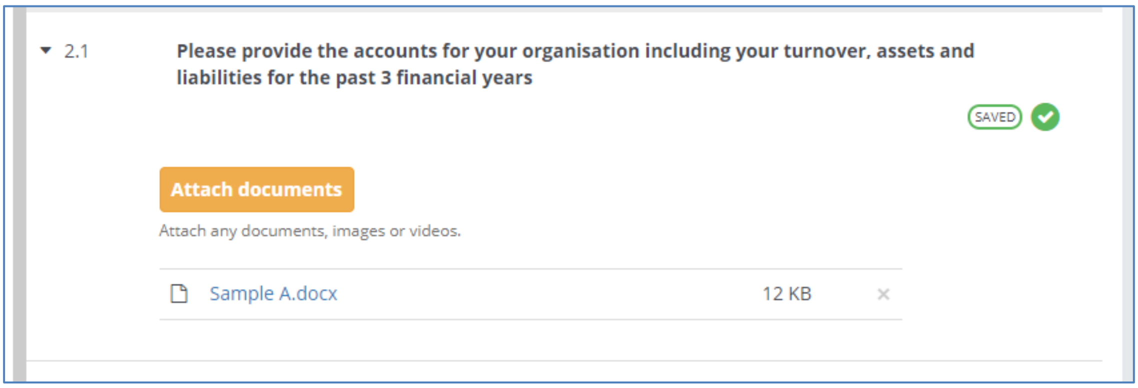


If for any reason the chosen file needs to be removed, simply navigate cursor over the ‘Added’ button and it will turn into a red ‘Remove’ button. Once clicked, file will be removed from the question and you may select another file or multiple files.

To attach files from User computer simply select ‘My Computer’ on the top left corner of the popup window and then orange button ‘Attach files’. This will open your Computer window with files stored on it. Simply select the chosen file.



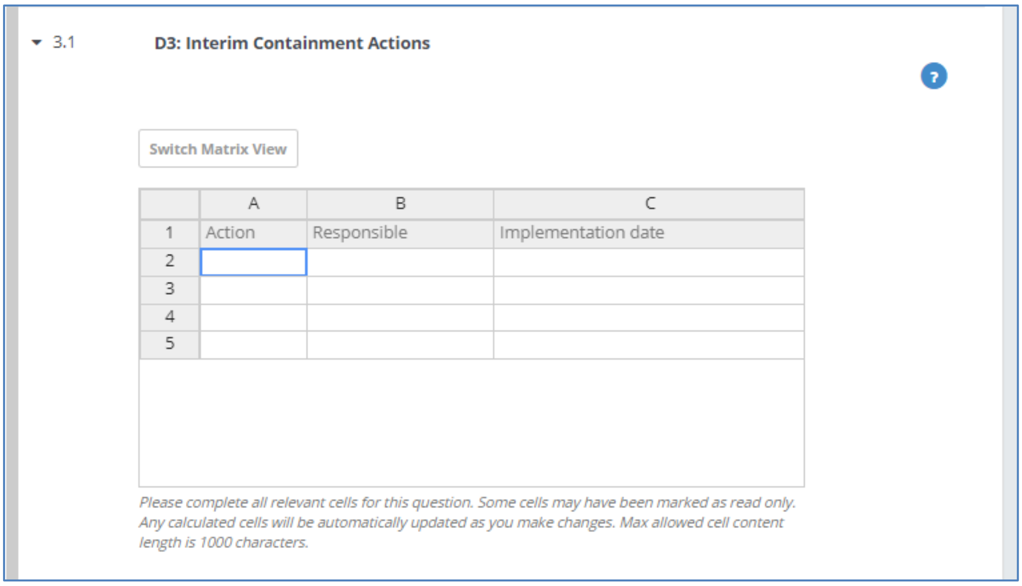
Once the proper file is chosen for the question, it will be added into it, and will appear below the ‘Attach documents’ button. The file size will be displayed and an ‘x’ button to remove the file if necessary. Please note there is a file size limit of 20MB per file.



Matrix

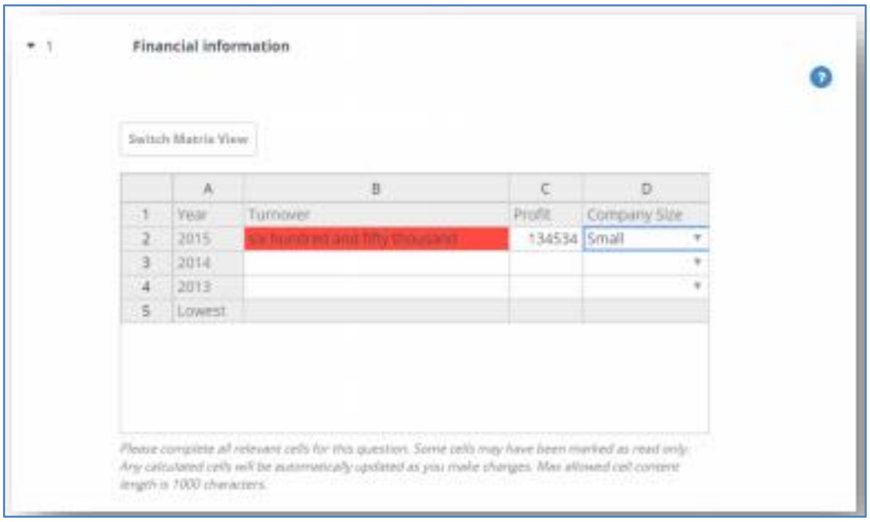
The Matrix question allows you to enter the data in the form of an Excel-like spreadsheet.

To provide information in a Matrix question, simply click on a blank white cell. This will highlight the cell in blue and you can start typing in it.

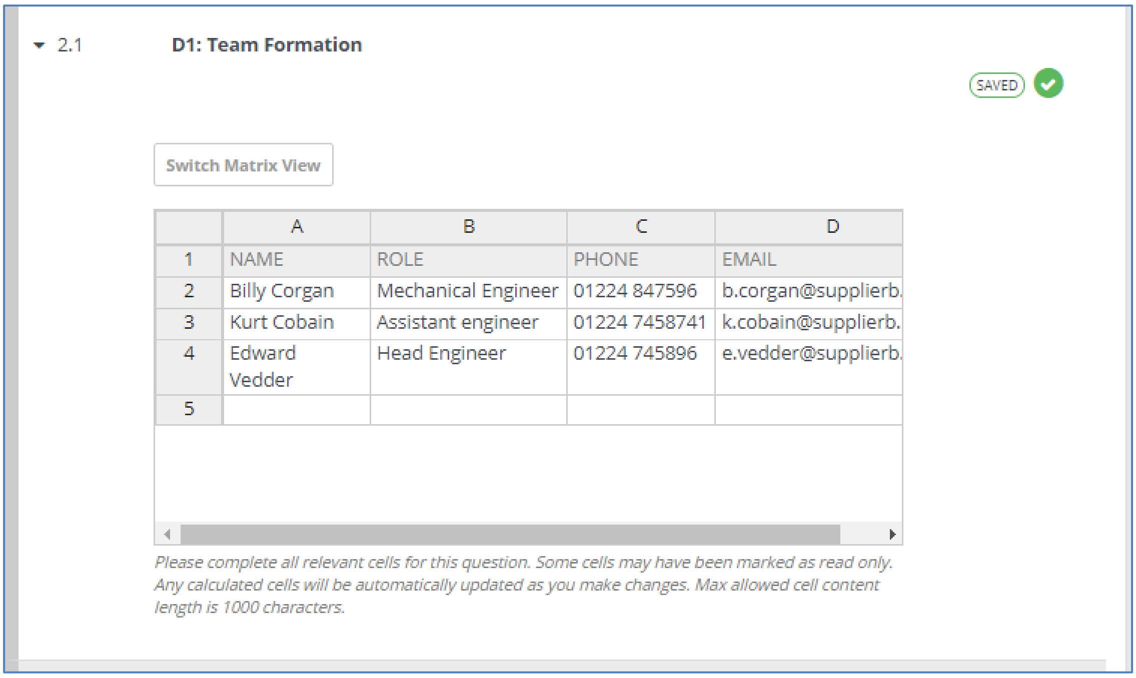


Please note that only white cells are for the User to fill out. All grey cells are read-only.

At times the buyer may impose a validation pattern on certain fields meaning they want your answer is a predetermined format. Common examples include a number, date or a dropdown. If you do not conform to the format then the box will be red and you cannot submit an answer, the box will be white when there is an acceptable answer. When a dropdown option is present simply click on the arrow and choose from the options.

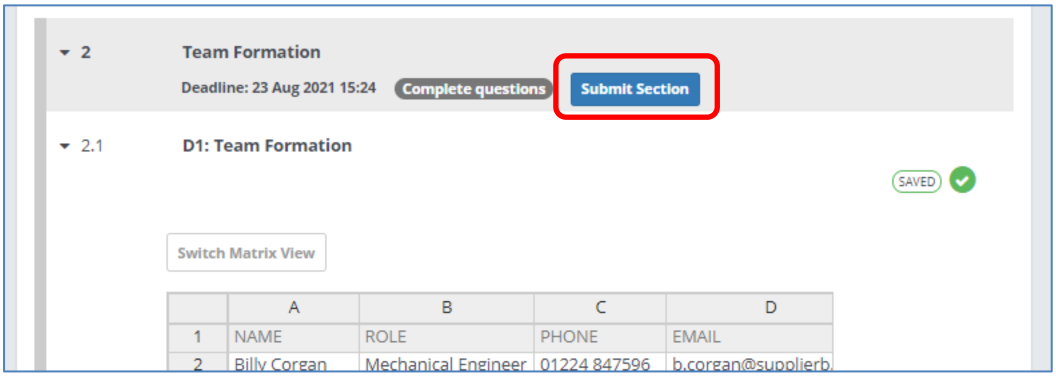


Once the information is filled out, the Blue/Red question mark turns into a green tick to indicate that the question has been answered. This can be changed at any time until your Response is submitted.

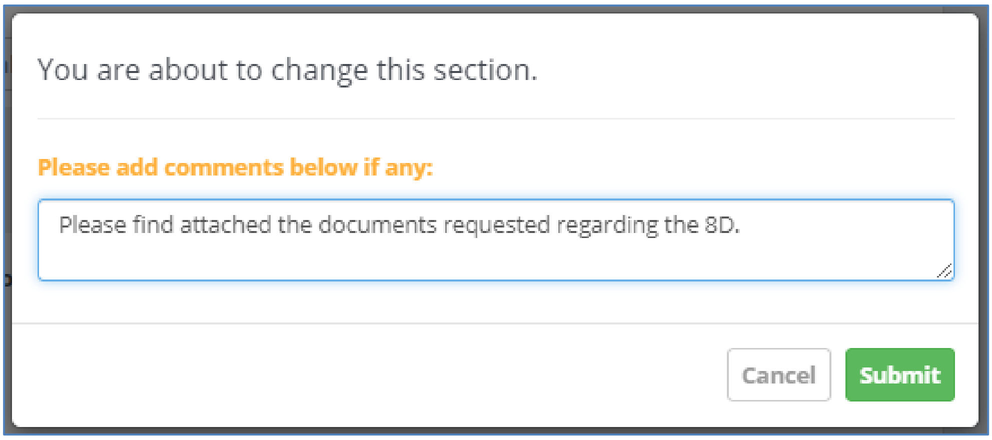


Submit Section

When you have completed the questions in the Section you are ready to submit this to the Buyer. To do this click on 'Submit Section'.



When you do this you then have the option of adding some comments which will be visible to the Buyer.

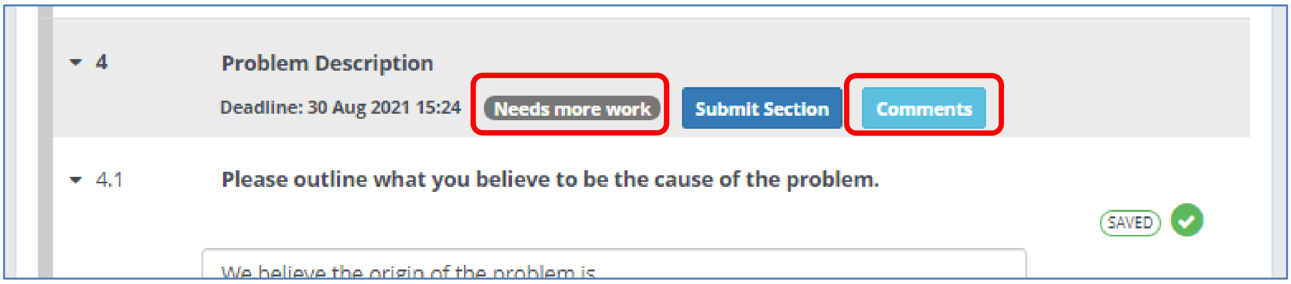


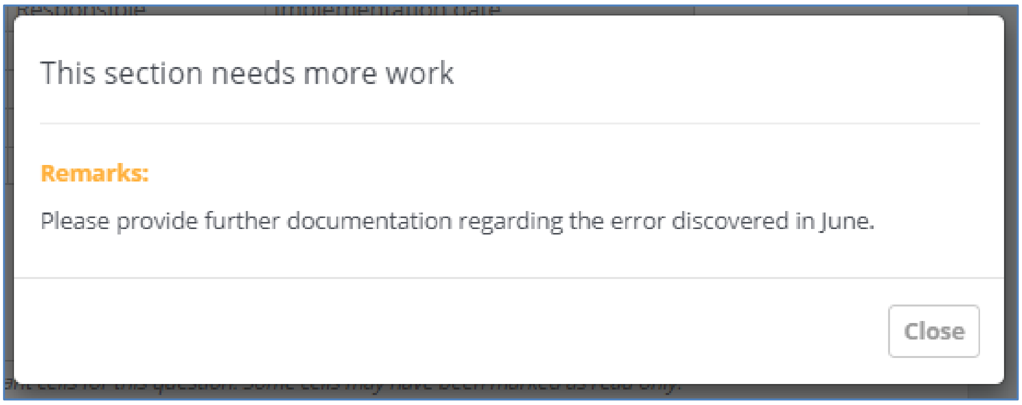
The status of the section will then change from 'Complete Questions' to 'Waiting for Approval'.

The buyers will be notified by email that you have submitted the Section and it is ready for them to review your work.

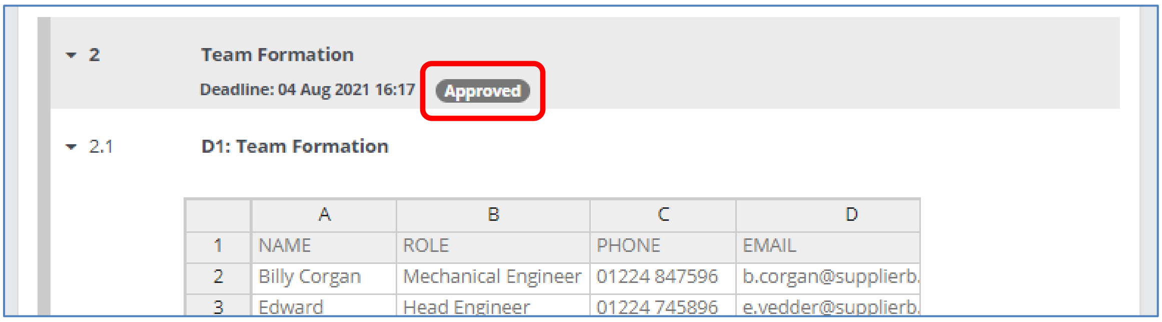
If the Buyer is not completely satisfied with your work or require anything further on it, they may mark the section as incomplete. If this happens you will be notified by email and the status of the

Section will change to ‘Needs more work’. If you click on ‘Comments’, you will see any that the Buyer may have included.



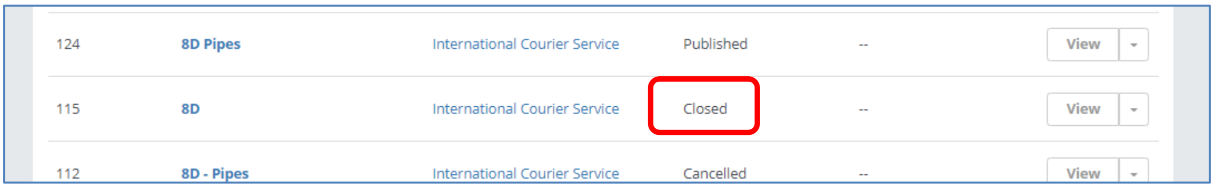


If the Buyer is satisfied with the work, you have provided they will mark it as Complete and the status will change to Approved.



Closed

The Buyer can close the Action Plan at any time if they feel the issue has been resolved. When they do this, you will be notified by email and the status of the Action Plan will change to ‘Closed’.



Cancelled

If an Action Plan has been sent in error the Buyer may cancel an Action Plan.