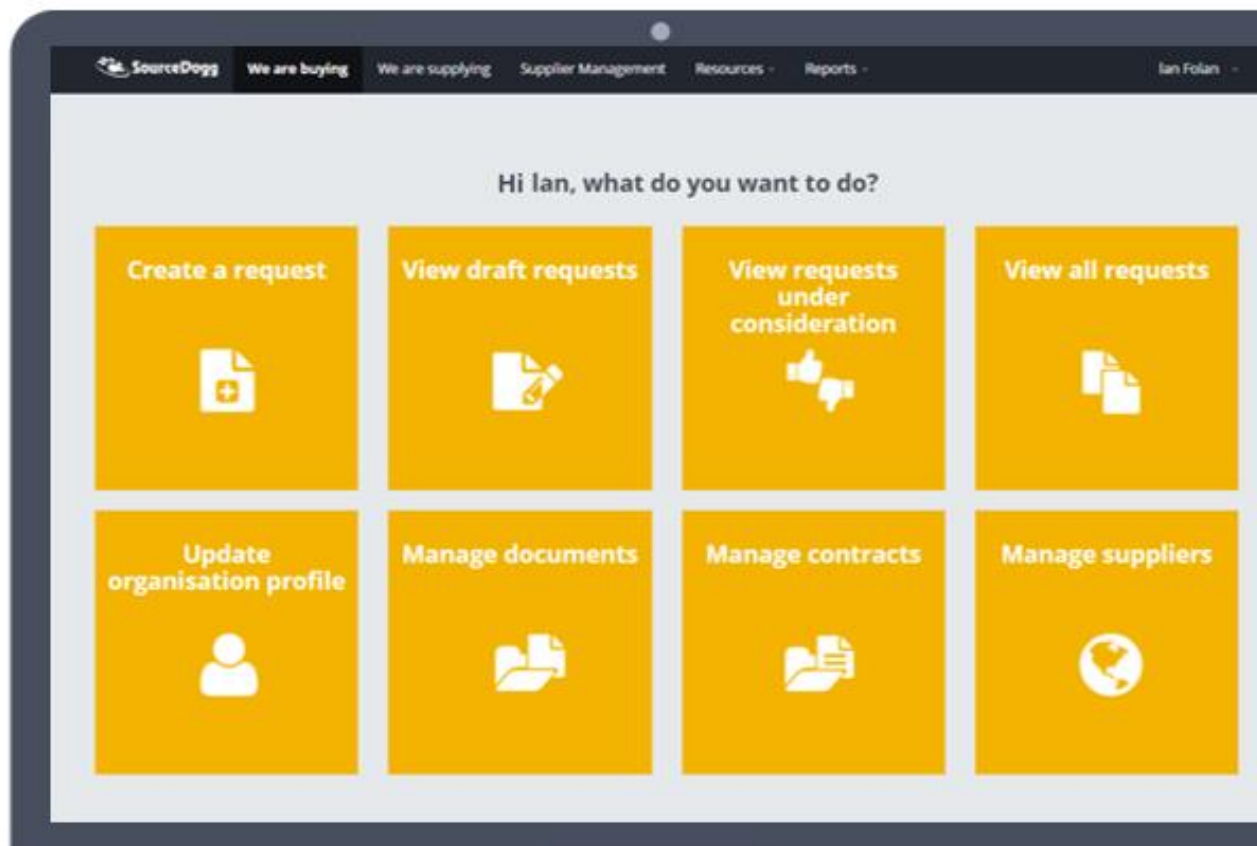




SourceDogg

Action Plans

User Guide



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Introduction

The Action Plans module in SourceDogg is for highlighting an issue you have had with a supplier. 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 is a Record that the supplier can fill out in different stages with different timescales.

Action Plan User Permissions

Each SourceDogg user will be required to have appropriate level of permissions applied to their account before they will be able to access the Action Plans module. Below is the list of all the current options with the brief description for each Action Plans role.

Action Plan Permissions Group

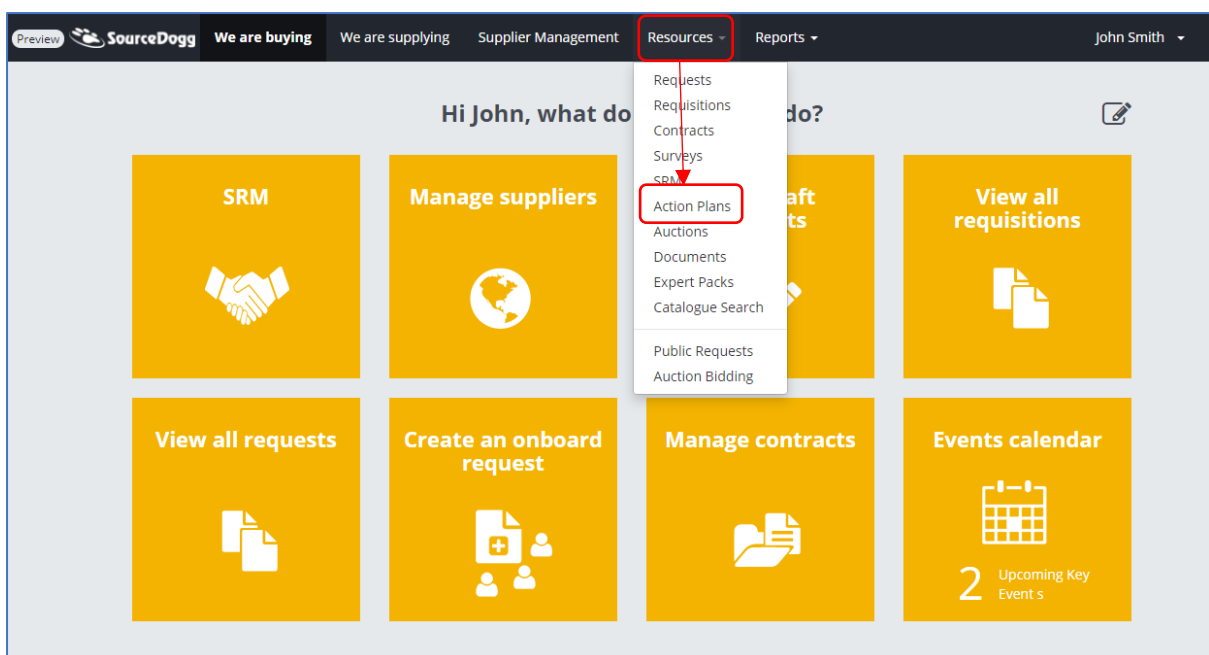
Action Plan Admins Action Plan Approvers Action Plan Editors
 Action Plan Readers No Action Plans

- 1. No Action Plans** – If this option is selected, the user will have no visibility of any Action Plan and they will not be able to access the Action Plans module.
- 2. Action Plans Reader** – This user will be able to access any existing Action Plans but they will not be able to create new Action Plans or edit existing ones.
- 3. Action Plans Editors** – These users will be able to access any existing Action Plans, create individual Action Plan Records, but not Action Plans form Templates.
- 4. Action Plans Approvers** – These users will be able to access any existing Action Plans and can be responsible for approving Action Plans created by Action Plans users.
- 5. Action Plans Admins** – Has full permissions to access all functionality of the module, creates Action Plans forms for the Action Plans users.

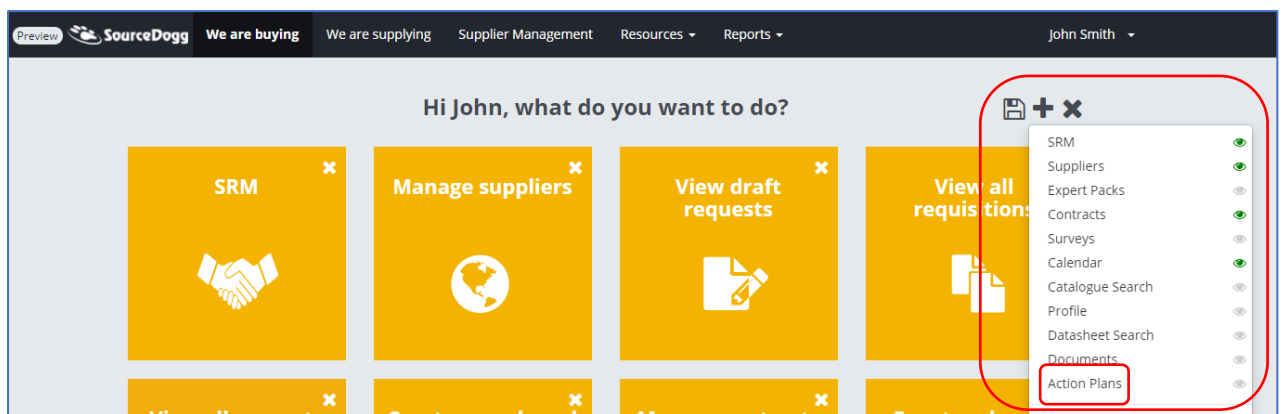
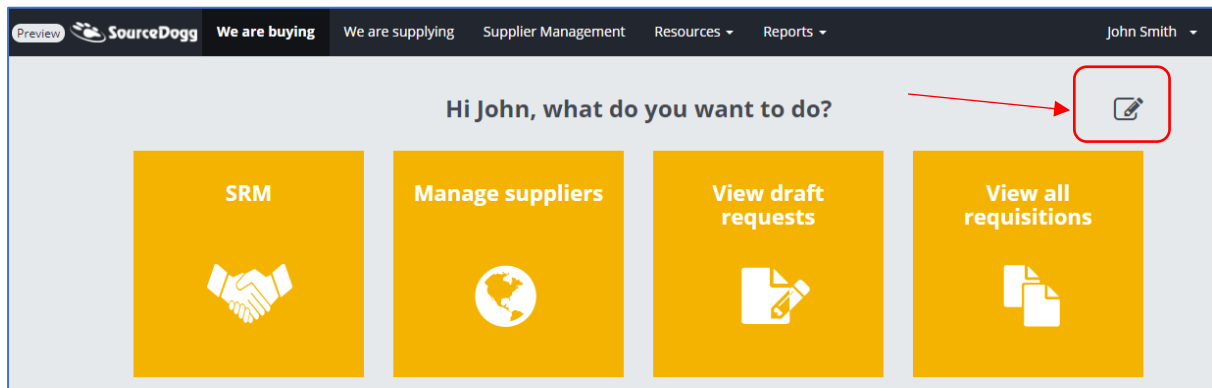
System navigation

There are 2 ways of accessing the Action Plans module.

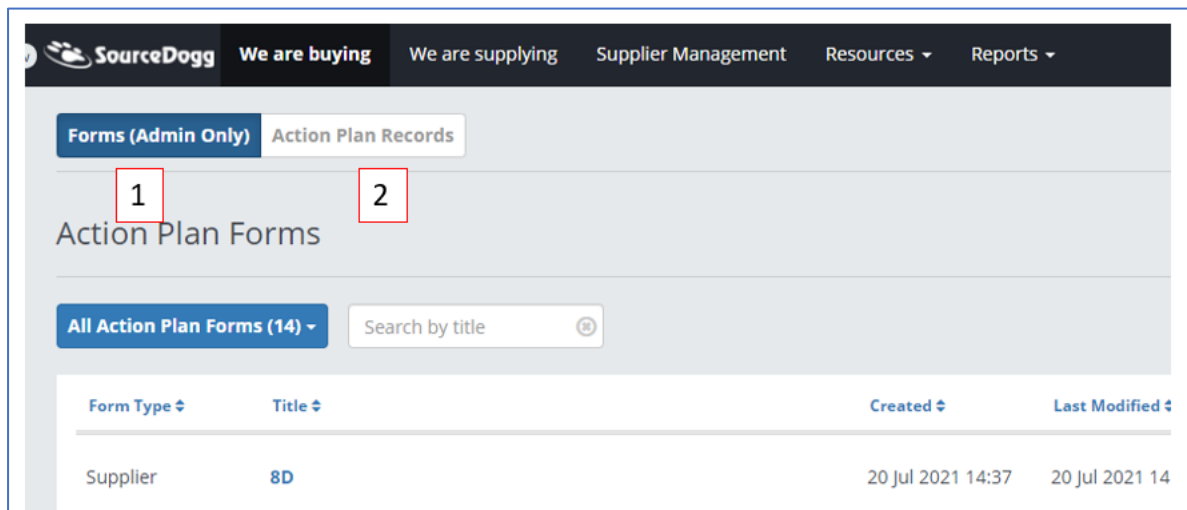
From any page on SourceDogg you can access Action Plans by clicking on the 'Resources' dropdown and selecting 'Action Plans'.



If your permission levels allow it you can also add the 'Action Plans' tile to your homepage by clicking on the pencil icon, followed by the + button and choosing it from the list.



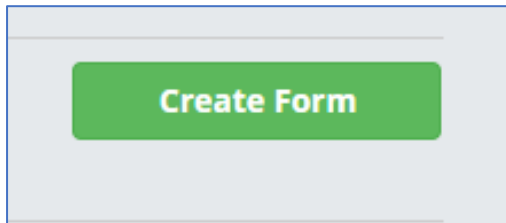
There are two areas in the Action Plans module.



- (1) Forms - This can only be accessed by Action Plans Admins and is where the Action Plans templates are created.
- (2) Action Plan Records – This can be accessed by Action Plans Admins, Approvers, Editors or Readers. This is where individual Action Plans are generated from templates, sent and managed after sending.

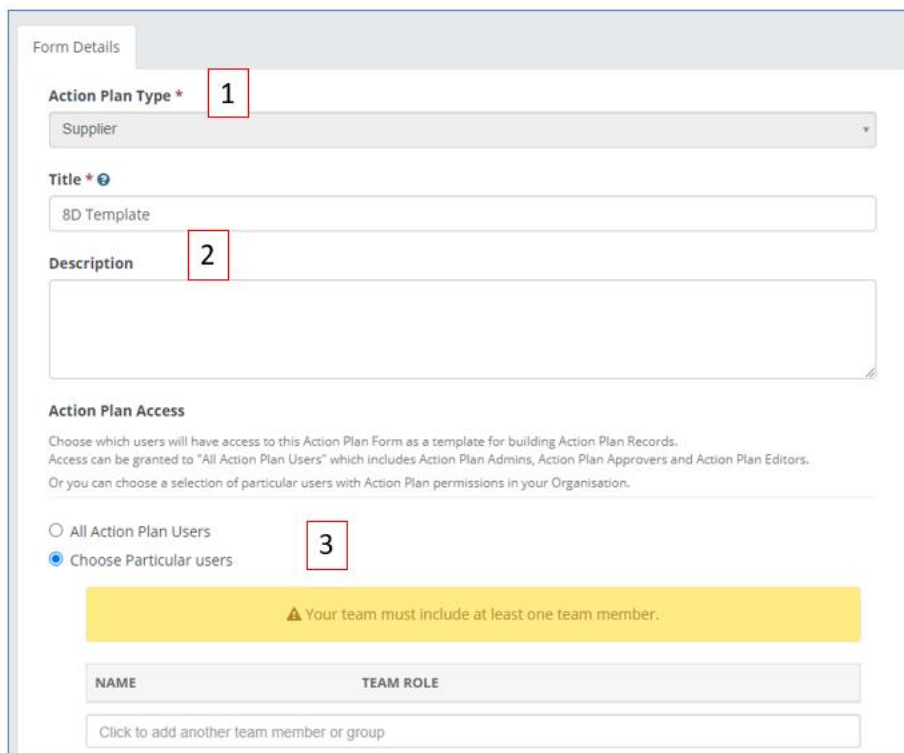
Action Plan Forms

Create Action Plan Form



As a first step of the process, an Action Plan Admin creates an Action Plan form. The user that is sending the Action Plans is not able to customise the content each time, they are working from templates that are set at an organisational level. To create an Action Plan form, click on the 'Create Form' button.

Form Details



1. **Action Plan Type** - Currently there is only an option for Supplier Action Plan but this may change in the future.
2. **Title and Description** - This will tell the user what this form is intended to be used for.
3. **Action Plan Access** - Each Action Plan form can either be used by all Action Plan users or a selected group of users, e.g. a department in your organisation. To do this click on 'Choose

Particular Users' and then select your users, or User Groups, from the available list. The group of users that have access to this form can be edited at a later stage if required.

The screenshot shows a form configuration interface with two main sections: 'Notification Team' and 'Approval Team'. The 'Notification Team' section includes a header, a descriptive paragraph, a yellow warning box stating 'Your team must include at least one team member.', a table with a 'NAME' column, and a button to add members. Below this is a selection prompt. The 'Approval Team' section includes a header, a descriptive paragraph, a table with 'NAME' and 'TEAM ROLE' columns, and a button to add members. Below this is another selection prompt.

Notification Team

Add Action Plan users who should receive emails when Action Plan Records from this form are created and closed. Action Plan Records can have additional notification team members but this is a master list of users who should always get an email for this form.

⚠ Your team must include at least one team member.

NAME

Click to add another team member or group

Please select Notification Team members.

Approval Team

Add Action Plan Admins or Action Plan Approvers to this form as approvers if they must approve all Action Plans created from this form.

NAME	TEAM ROLE
------	-----------

Click to add another team member or group

Please select Approval Team members.

Here you choose the **Notification Team**. They are not expected to be part of the process, these are 'Read only' users or User Groups that you want to receive emails when Action Plan Records from this form are created and closed. To do this click on 'Choose Particular Users' and then select your users, or User Groups, from the available list.

Then you choose your **Approval Team**, these are Action Plan Admins or Action Plan Approvers that must approve all Action Plans created from this form. If you have multiple Users, or User Groups, listed here only one of them needs to Approve. To do this click on 'Choose Particular Users' and then select your users, or User Groups, from the available list. This cannot be amended after the form has been published. Approvers are not notified by default, they need to be added to the notification team to receive approval notification emails. Approvers can't be changed on the individual action plan records that are issued, but the notification teams can be changed.

Once all the access and approval personnel are selected, the Action Plan form can be saved by clicking on 'Save Details' and a new tab – 'Content' will appear.

Content

The Content tab consists of 2 sections – Custom Fields and Custom Questions.

Custom Fields

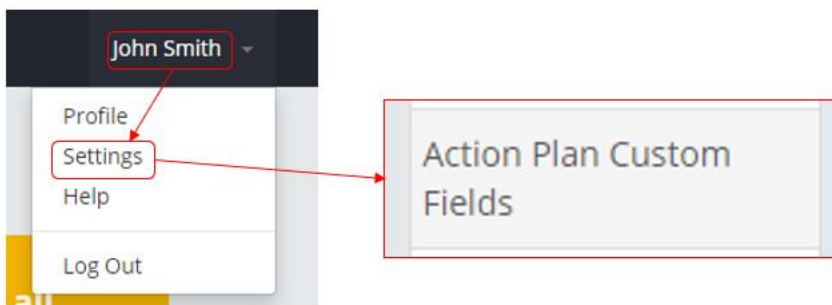
These are the internal fields the user completes before sending out the Record detailing what the issue is and any other information necessary for your reports. They are first created by an Account Admin in the Organisation's Settings area.

Custom Field	Include in Action Plan form	Visible to Supplier
Problem description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Part Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Detected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Problem Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

1. **Add Custom Field** – Click this and then choose from the dropdown.
2. **Include in Action Plan form** – Ticking this makes this Custom Field available in Records created from this form.
3. **Visible to Supplier** – If this is checked the custom field will be visible to suppliers on all Records created from this form. If unticked, it is still visible to internal users.

Creating Custom Fields

Action Plans Custom Fields are created and managed by an Account Admin in the Organisation's Settings area. To create an Action Plan Custom Field, click on your name in the top right corner of any SourceDogg page followed by Settings. Select 'Action Plans Custom Fields' from the menu on the left.



The custom fields already created are listed by their names and description entered when the custom field was created. To create a new custom field, click on the "Add Custom Field" button.

Add Custom Field

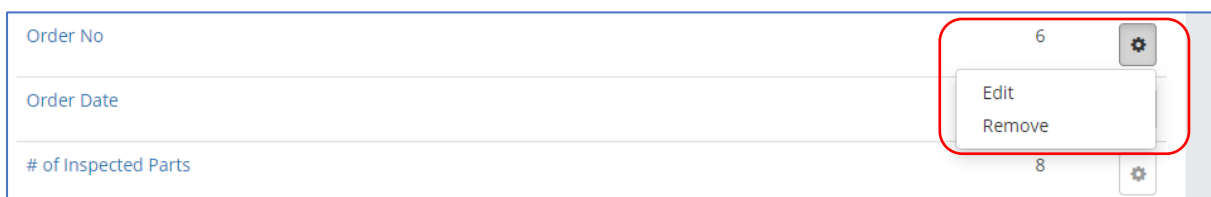
1. **Validation Pattern** - here you can define the validation pattern for the data to be entered into a custom field. Any data entered must fulfil the predefined condition, otherwise, it will not be saved. There are a handful of examples available.
2. **Validation Help Text** - this is a mandatory requirement when validation pattern is used. It helps suppliers to understand the format of information that they should enter.
3. **Background Colour** - using the colour picker you can select the colour for the custom field, which can be particularly useful if you want to separate the information of the similar nature, e.g. financial information. The application also accepts entering the colour code in hexadecimal format
4. **Dropdown Custom Lists** - instead of a supplier entering the data into the text field, you can create a drop-down list with the values you would like to use. The supplier then selects one of these and does not need to enter anything. This improves the accuracy and validity of the data, also helping to reduce miskeying the information and keep the data in perfect order.
5. **Allow Paragraph of Text** - custom field will allow entering larger amount of text - with the limit of 2000 characters

1. **Permissions** – Do you want this Custom Field to be visible to suppliers or not. This can also be changed when creating Action Plan forms.

2. **Display in Records List View** – Ticking this will add this custom field as a column in your list of Action Plan Records, there is a maximum of 2 spaces available.
3. **Custom Field is required for the following actions** - Select for which actions is mandatory to have the custom field filled. Useful to enforce the information is entered before the action is performed. E.g. department must be entered before the Record is sent.
4. **Save** - When all the required information is completed click 'Save'.

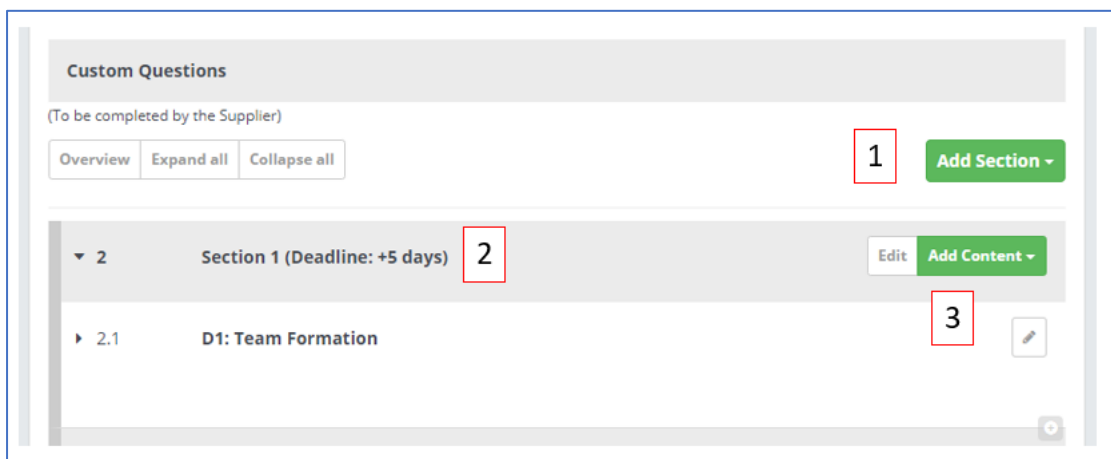
Editing / Deleting Custom Fields

To edit or delete an Action Plan Custom Field just click on the cog opposite the required custom field and choose one of the options.



Custom Questions

These are the questions the supplier completes when submitting their response.

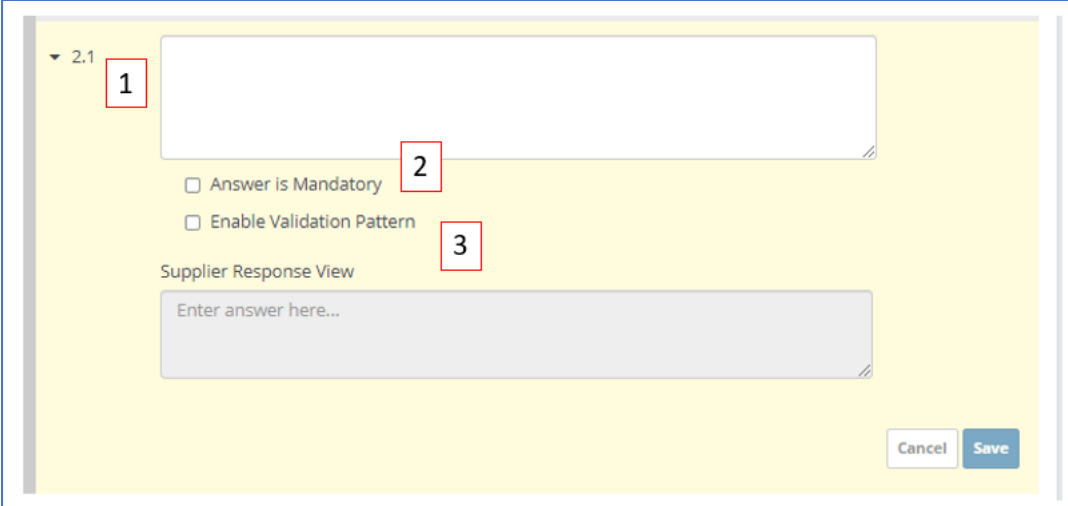


1. **Add Section** - To begin click this button and enter the Section Title.
2. **Section Deadline** - Each section also allows you to set a guideline deadline for the supplier to respond within e.g. if you enter 5 days, when the form is published it will be +5 days from the published date. You can either type the number of days or use the arrows. These are just initial guidelines, when the Record is being published this can be amended before it is sent out. Please also note that these are not hard deadlines for suppliers, they can still submit responses after this deadline has passed. These are working days and will skip weekends.

3. **Add Content** – You then choose what questions you would like to send to the supplier. There are 3 question types to choose from – Freetext, Document and Matrix. Any of the questions can be marked as mandatory or non-mandatory to complete.

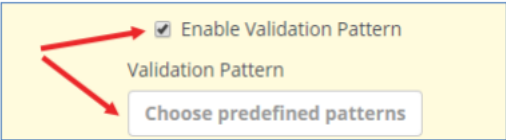
Freetext

The Free Text question is a question that allows a 'block of text' response from the supplier, whether it's one line answer or an 'essay' type answer. This question can be used for 'Please explain...', 'What are the details of...' and 'How does...' type questions.



1. Here you can write the question for the respondent to complete.
2. Selecting this option will make the question mandatory and the supplier will not be able to submit a response to your RFX without completing it
3. Enable validation pattern.


By clicking on Enable Pattern – the option to choose Predefined Patterns, becomes available.



There are various options when choosing Enable Validation Pattern - Predefined Patterns or Custom Validation Patterns.

Predefined Patterns

Choose predefined pattern

Select Predefined Pattern 


Result Pattern

The Predefined Pattern has 3 options

1. **Only Digits**

Please note the commas, decimal points and other separators will be blocked.

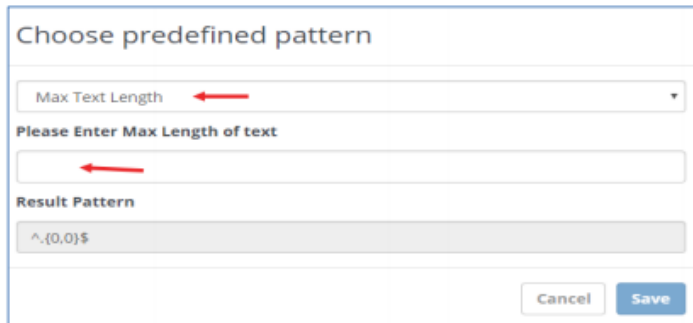
Choose predefined pattern

Only Digits 

Result Pattern

2. Max Text Length

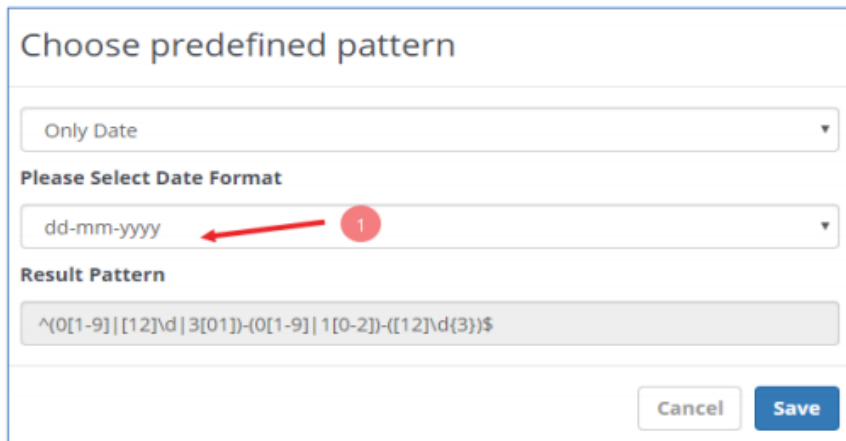
Enter the number of characters the you would like to limit the text to



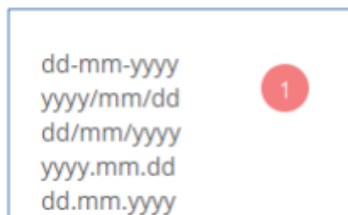
The screenshot shows a dialog box titled "Choose predefined pattern". It has a dropdown menu with "Max Text Length" selected, indicated by a red arrow. Below the dropdown is a text input field with "Please Enter Max Length of text" and a red arrow pointing to it. Underneath is a "Result Pattern" field containing the regex `^.{0,0}$`. At the bottom right are "Cancel" and "Save" buttons.

3. Only Date

Allows you to choose, which format you would like the date to appear - are 5 different Date Formats to choose from:



The screenshot shows a dialog box titled "Choose predefined pattern". It has a dropdown menu with "Only Date" selected. Below it is a "Please Select Date Format" dropdown menu with "dd-mm-yyyy" selected, indicated by a red arrow and a red circle with the number "1". Underneath is a "Result Pattern" field containing the regex `^[0[1-9]|[12]\d|3[01]]-[0[1-9]|1[0-2]]-([12]\d(3))$`. At the bottom right are "Cancel" and "Save" buttons.



A list of five date formats is shown in a box. A red circle with the number "1" is positioned to the right of the first format, "dd-mm-yyyy".

- dd-mm-yyyy
- yyyy/mm/dd
- dd/mm/yyyy
- yyyy.mm.dd
- dd.mm.yyyy

Validation Help Text – this box must be completed when entering any Validation Pattern

[Custom Validation Patterns](#)

Custom validation patterns can also be used. This allows you to define the formula that will be used to verify the content of the supplier answer. Only data entered matching the validation pattern will be accepted as a valid answer.

Enable Validation Pattern

Validation Pattern

[Help with this pattern](#)

Validation Help Text *

This text will be displayed below the answer box.

Supplier Response View

Enter the numbers only.

You can enter the validation pattern using Regular Expressions or click on “Help with this pattern” where several examples are saved. The Validation Help Text is mandatory field when using the validation pattern as it helps the supplier to understand the requirements.

Validation Help Text – this box must be completed when entering any Validation Pattern.

More details can be found in Validation Patterns User Guide:

https://www.sourcedogg.com/wpcontent/uploads/2019/08/User-Guide-16.-Validation-patterns_updated_August2019.pdf

Document

The Document Question allows the User to gather any number of documents from the Supplier. This question can be used for ‘Please attach...’, or ‘Include Supporting Documents’ Type questions.

▼ 2.1

Answer is Mandatory

Excel Template Question ?

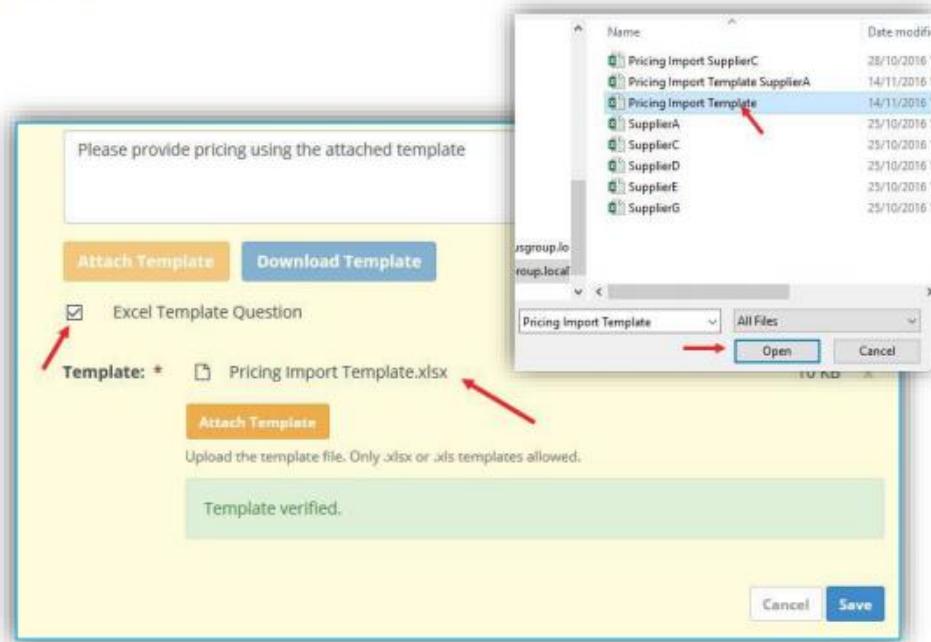
Allow a free text answer choice ?

1. Insert the purpose of the document question here
2. If you require the question to be a mandatory one you can tick this box.
3. Tick this box if you want to supply an Excel template to be filled in by the supplier, see below for more detail on this.

4. You can also allow suppliers to provide supporting text to the document by ticking this last box.

Excel Template Question

By selecting the Excel Template Question checkbox, this will extend the functionality of the document question and you will be able to upload the pricing template for the suppliers to fill with the information required. The template to be used must be in excel format and cannot have any merged cells. SourceDogg recommends using simple spreadsheets without pictures to achieve the best results when exporting the data.



When this option is selected, the supplier must download the template and then upload it back with their pricing data into the same question. Please note that once a document question has been converted to an Excel Template Question, the supplier can only respond to that question by uploading an updated copy of the template. Other files will be blocked.

Matrix

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

2.1 Matrix Question

1 Enter your question

Switch Matrix View

2

	A	B	C
1			
2			
3			
4			
5			

3

Matrix can not be... one cell.

Clear

Use the right mo... ns and to make cells read-only.
Formulas ? ca... ulation functionality.
Max allowed cell...

4 Answer is Mandatory ?

1. Enter your question in the box provided.
2. You can add and remove to the number of rows and columns so it matches the requirement you have for the data you are collecting from suppliers.
3. To do this, right-click on any cell in the matrix and select the appropriate option. To select multiple cells, click on the cells and then move the mouse in selected direction to include additional cells into your selection. If you click on the column or row, all the relevant cells will be selected.
4. Ticking this box will make the question mandatory to answer.

Edit Validation

It is also possible to set up a validation pattern for each cell, or for rows or columns as needed. This will ensure the consistency of data entered by suppliers. To activate the validation pattern, select one of the cells, right click and select 'Edit Validation' from the context menu.

Matrix Cells Type

Cell Type

Set for

All cells

Cell

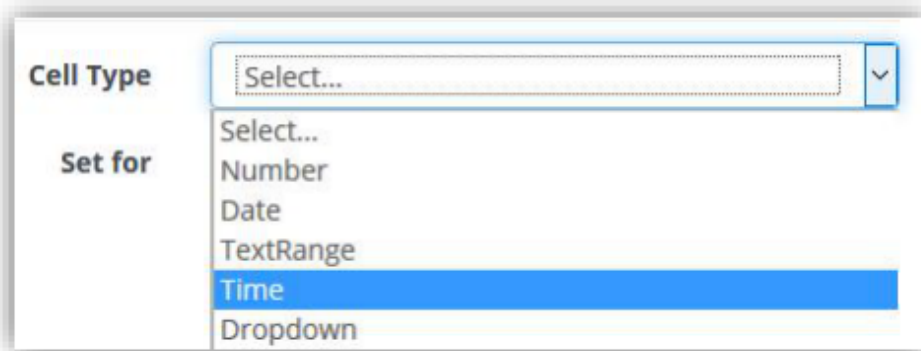
Column

Row

Cell Range

Cancel Save

Here you can select the range you want to apply the validation for, e.g. Cell, Column or Row. You can also select the validation type from the Cell Type menu, currently available are validations by number, date, the length of the text, time or dropdown list.



Once the validation pattern is set up for the cell or range of cells, this is indicated by the dark grey colour as on the picture below.

	A	B	C
1	Year	Turnover	Profit
2	2015		€0 - €100,000 ▾
3	2014		
4	2013		
5	Lowest	=min(B2:B4)	=min(C2:C4)

You also have the option to make the cells read-only by selecting this option in the context menu or use the checkbox Answer is Mandatory for making all the cells mandatory for the supplier.

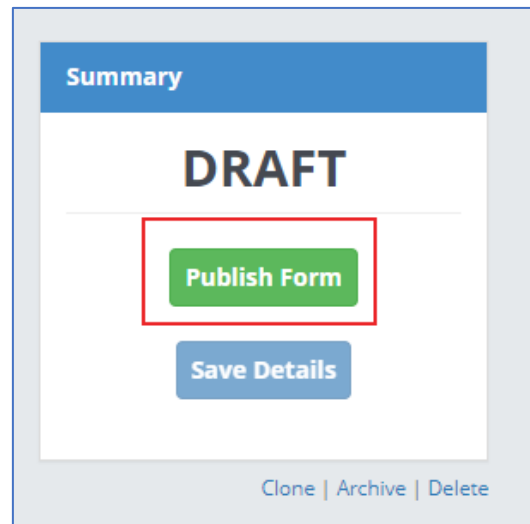
Cells in a matrix question can optionally contain formulas to allow you to build complex question structures.

Formulas begin with an equals sign and may contain common operators +,-,/,*, numbers, references to other cells, parenthesis(,) and the functions listed below.

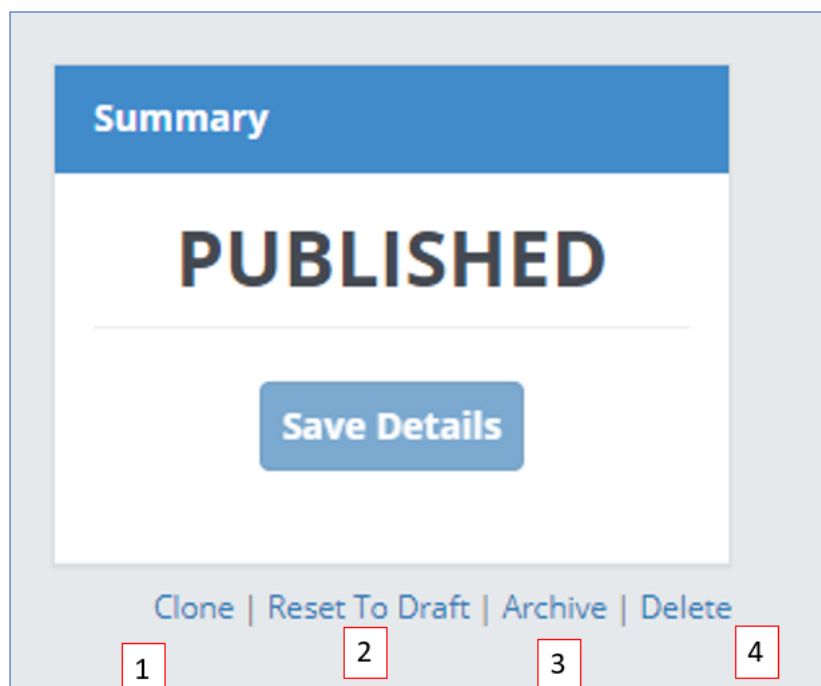
Examples:	
FORMULA	DESCRIPTION
=A1+B1	Sum values A1 and B1
=SUM(A1:A5)	Sum values from the range A1:A5
=MAX(A1:0)	Max value from the range A1:A10
=SUMIF(A5:J5,>5)	Sum values from the range A5:J5, if greater than 5
=IF(A1>B2,'TRUE','FALSE')	TRUE if A1 value is greater than B1, otherwise - FALSE
=AVERAGE(A1:D1,H1)	Average value for the range A1:D1, including H1

Publish Form

When you have entered the number of Sections and Questions you need you are ready to publish, you can do this by clicking on the 'Publish Form' button to the right of the form.



When the form is published it is available for users. From here there are some further options.



1. **Clone** – This will create an exact copy of the form. It is in draft form so changes can be made before publishing.
2. **Reset To Draft** – If you need to make changes to the form you can choose this option. It will reset the form back to draft status. This can only be done if there are no published records that were created using this Form.

3. **Archive** – If the form is no longer needed this option means the form will not appear in the list of available forms. Archived forms can be Reactivated, by pressing the Reactivate, button on the Form Details page. This can only be done by Action Plans Admins.
4. **Delete** – This will permanently remove the form from the list.

Action Plan Records

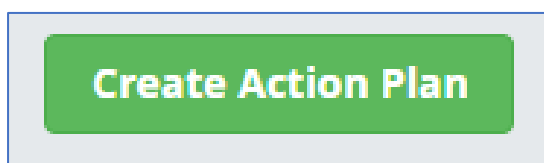
Here you can see a list of all the Action Plans your organisation has sent out.

The screenshot shows the 'Action Plan Records' page. At the top right is a 'Create Action Plan' button (7). Below it is a search bar and a dropdown menu for 'All Action Plan Records (1)'. The table below has columns: Id (1), Title (2), Creator (3), Supplier (4), Status (5), and Next Due Date (6). A single record is shown with Id 112, Title '8D - Pipes', Creator 'Ronan Heffernan', Supplier 'SupplierB (UK)', Status 'Published', and Next Due Date '26 Jul 2021 11:36'. An 'Edit' button is next to the record.

1	2	3	4	5	6	
Id	Title	Creator	Supplier	Status	Next Due Date	
112	8D - Pipes	Ronan Heffernan	SupplierB (UK)	Published	26 Jul 2021 11:36	Edit -

1. **Id** – The unique ID number of the Action Plan.
2. **Creator** – The name of the user that sent the Record.
3. **Supplier** – The name of the supplier it was sent to.
4. **Custom Fields** – When creating your Custom Fields, if you have chosen any to 'Display in Records List View' they will be shown here
5. **Status** – The stage this particular Record is at. This can be Draft, Published or Closed.
6. **Next Due Date** – The Record may have multiple deadlines, this will tell you which one is due next. If the deadline has passed it will show as red.
7. **Create Action Plan** – This will create a new Action Plan Record.

Create Action Plan



Clicking the green 'Create Action Plan' will create a new Action Plan Record.

Action Plan Record Details

1. **Please Select the Action Plan Record Type** - Currently there is only an option for Supplier Action Plan but this may change in the future.
2. **Please Select the Action Plan Form** – Click on the dropdown and choose which of the forms you wish to use.
3. **Provide Action Plan Record Title** – This is the name, or title, of the record.
4. **Notification Team** – Users, or user groups, will have already been added to the form by its creator. However, these can be removed and replaced by clicking in the box to add additional users who will be notified when the record is created, updated or closed.

5. **Please Select the Action Plan Supplier Pool** – Click on the dropdown to choose between Full Suppliers Pool or SRM Suppliers. There is a guide on how to add suppliers to your pool [here](#).
6. **Please Select Action Plan Supplier** – Enter the name of the supplier this Record is to be sent to. Only one supplier can be invited per Record. The supplier will be notified by email when the Record is published.

Once all the Action Plan Record Details are entered, the Action Plan Record can be saved by clicking on 'Save Details' and a new tab – 'Submission' will appear.

Submission

There are 2 sections of the Submission tab – Custom Fields and Custom Questions

Custom Fields

Action Plan Record Details Submission

Please complete the standard questions listed below.

1. Custom Fields

(To be completed by Buyer)

	Visible to Supplier
Problem description (Required) <input type="text"/>	Yes
Part Name (Required) <input type="text"/>	Yes
Detected (Required) <input type="text" value="Select..."/>	Yes
Problem Type (Required) <input type="text" value="Select..."/>	Yes

These fields have been created by an Action Plan Admin and are to be completed by you before sending the Record to the supplier. The fields could be single lines of text, paragraphs of text or dropdown menus. If a field is marked as required it must be completed by you before the Record can be sent to the supplier.

Custom Questions

Custom Questions

Custom questions listed below will be completed by the supplier selected in this Action Plan.
(To be completed by the Supplier)

Overview Expand all Collapse all 1 Edit Section Deadlines

▼ 2 **Section 1**
Deadline: 25 Jul 2021 14:30 **Not started**

▼ 2.1 **D1: Team Formation**

	A	B	C	D
1	NAME	ROLE	PHONE	EMAIL
2				
3				
4				
5				

Please complete all relevant cells for this question. Some cells may have been marked as read only. Any calculated cells will be automatically updated as you make changes. Max allowed cell content length is 1000 characters.

▼ 3 **Section 2**
Deadline: 25 Jul 2021 14:30 **Not started**

2

1. Edit Section Deadlines – The Section deadlines were set (eg +5 days after Record is created) when the Record was created but can be amended by you before the Plan is sent.
2. Custom Questions - These fields have been created by an Action Plan Admin and are to be completed by the supplier.

Edit Section Deadlines

If you feel the deadlines set by the creator if the form are not suitable for the Record you are looking to publish, you can amend them by clicking on ‘Edit Section Deadlines’. Then enter your new dates/times into the boxes provided and click ‘Submit’.

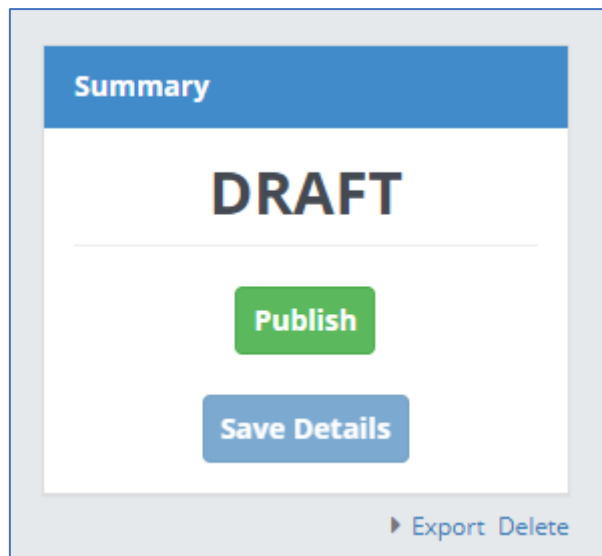
Section Deadlines

Please Review deadlines you have assigned to each section

SECTION NAME	DEADLINE
Team Formation	05/08/2021 14:15
D2: Problem description	10/08/2021 14:15
D3: Interim Containment Actions	12/08/2021 14:15

Cancel **Submit**

When you have completed the Custom Fields and you are happy with the Custom Question deadlines you are ready to send the Action Plan to the supplier by clicking ‘Publish’.



Edit Custom Fields

If you discover some new information or if there has been an update that you wish to share with the supplier, you can change the information in the 'Submission' tab by clicking on 'Edit Custom Fields'.

Action Plan Record Details | Submission | Approval

Please complete the standard questions listed below.

1. Custom Fields Edit custom fields

(To be completed by Buyer)

Visible to Supplier

No

Yes

Company Name

Problem

When saving the changes, you've made you then have the option of sharing this new information with the supplier by an email notification.

You are about to update Action Plan record. It will be visible to suppliers.

You have made changes to the Custom Fields of the Action Plan that were visible to suppliers. The suppliers will see these changes when they next login.

Do you wish to email the supplier about these changes now?

No Email Needed **Send Email**

Any fields that have been made will be marked as 'Edited', this is also visible on the supplier's side.

The screenshot shows the 'Approval' tab of an 'Action Plan Record'. The main heading is 'Please complete the standard questions listed below.' Below this is a section titled '1. Custom Fields' with an 'Edit custom fields' button. A note indicates '(To be completed by Buyer)'. The 'Company Name' field contains 'Supplier X' and is marked as 'Edited' with a red box. To the right, there is a 'Visible to Supplier' toggle set to 'No'.

Supplier Responds

When the Record is first sent to the supplier the status of the sections will show as 'Not Started', this will update as the supplier completes and returns them to you.

The supplier can submit before the due date or after and doesn't have to do the sections in sequence. It is possible for them to complete them all at the same time if they have all the answers immediately.

The screenshot shows a section titled 'D3: Interim Containment Actions' with a deadline of '11 Aug 2021 15:17'. A 'Not started' status label is highlighted with a red box. Below the section is a table with columns A (Action), B (Responsible), and C (Implementation date). The table has 5 rows, with the first row containing headers and the subsequent rows being empty. Below the table is a text area for notes.

	A	B	C
1	Action	Responsible	Implementation date
2			
3			
4			
5			

Please complete all relevant cells for this question. Some cells may have been marked as read only. Any calculated cells will be automatically updated as you make changes. Max allowed cell content length is 1000 characters.

When the supplier has done this, you will receive an email notification (titled 'Action Plan has been submitted') and the status will change to 'Needs Approval'. Please note that you need to be in the Notification team to get the email. You can then choose to 'Mark as complete' or 'Mark as incomplete' depending on whether or not you happy with the information provided.

Each section operates independently of the others so it's possible to accept some and not others.

▼ 3 D2: Problem description
Deadline: 09 Aug 2021 15:17 **Needs approval** **Mark as complete** **Mark as incomplete**

▼ 3.1 D2: Problem description

	A	B
1	What is the problem?	Cracked pipeline
2	When did it happen?	24/02/2021
3	Where was it detected?	Main plant
4	How many products are affected?	3
5	Who found the problem?	Jack White

Please complete all relevant cells for this question. Some cells may have been marked as read only. Any calculated cells will be automatically updated as you make changes. Max allowed cell content length is 1000 characters.

When marking as either Complete or Incomplete you have the option of recording some comments which will be visible to the supplier.

Mark as complete



You are about to change this section.

Please add comments below if any:

Satisfied with the information provided.

When marked as Complete the status of the section will change to 'Approved'.

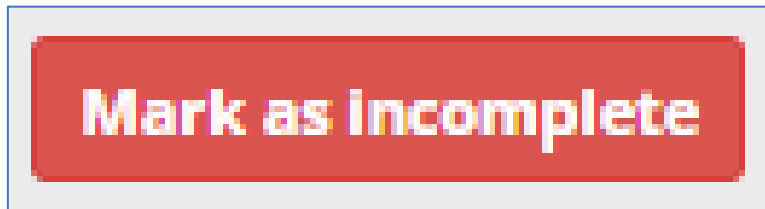
▼ 3 **D2: Problem description**
 Deadline: 09 Aug 2021 15:17 **Approved**

▼ 3.1 **D2: Problem description**

	A	B
1	What is the problem?	Cracked pipeline
2	When did it happen?	24/02/2021
3	Where was it detected?	Main plant
4	How many products are affected?	3
5	Who found the problem?	Jack White

Please complete all relevant cells for this question. Some cells may have been marked as read only. Any calculated cells will be automatically updated as you make changes. Max allowed cell content length is 1000 characters.

Mark as incomplete



You are about to change this section.

Please add comments below if any:

If it's been marked as Incomplete the status will change to 'Needs more work' and the supplier will be notified by email. If you have included a comment this can be viewed by clicking on 'Comments'. This reopens it for the supplier to do more work or include more information before resubmitting to you.

▼ 2 **Team Formation**
 Deadline: 04 Aug 2021 15:17 **Needs more work** **Comments**

▼ 2.1 **D1: Team Formation**

	A	B	C	D
1	NAME	ROLE	PHONE	EMAIL
2	Billy Corgan	Mechanical Engineer	01224 847596	b.corgan@supplierb.c
3	Edward Vedder	Head Engineer	01224 745896	e.vedder@supplierb.c
4				
5				

Please complete all relevant cells for this question. Some cells may have been marked as read only. Any calculated cells will be automatically updated as you make changes. Max allowed cell content length is 1000 characters.

When you are satisfied with the work the supplier has submitted to you and you have marked each of the sections as complete you are then ready to move onto the 'Approval' tab to close the overall Action Plan.

Action Plan Record Details | **Submission** | Approval

Please complete the standard questions listed below.

1. Custom Fields Edit custom fields

(To be completed by Buyer)

Action Plan Attachments

Attach documents

Attach any supporting documents or videos that suppliers need to view or will assist them with their response

Custom Questions

Custom questions listed below will be completed by the supplier selected in this Action Plan.
 (To be completed by the Supplier)

Overview | Expand all | Collapse all

- ▶ 2 **Team Formation**
 Deadline: 04 Aug 2021 15:17 **Approved**
- ▶ 3 **D2: Problem description**
 Deadline: 09 Aug 2021 15:17 **Approved**
- ▶ 4 **D3: Interim Containment Actions**
 Deadline: 11 Aug 2021 15:17 **Approved**

Approval

The Approval tab contains a log of everything that has happened in the process up until now and is where the Action Plan can be closed off.

The screenshot displays the 'Approval' tab of an 'Action Plan Record Details' page. The page is divided into two main sections: 'Action Plan Approval Details' and 'Action Plan Approval'.

Action Plan Approval Details:

- Supplier Organisation: **SupplierB (UK)** (view full profile)
- Action Plan Published By: Ronan Heffernan
- Action Plan Published Date: 28 Jul 2021 15:17
- Action Plan Approval Team: Billy Corgan
- Group: Ronan Test Group, Ronan Heffernan

Action Plan Approval:

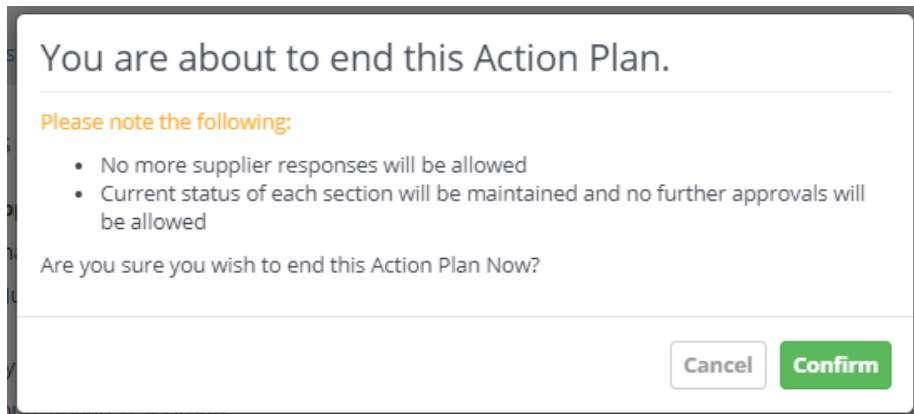
User Name	Change Date	Comment	New Status
Team Formation			
[Supplier] Bobby Smith	29 Jul 2021 14:42		Submitted
[Buyer] Ronan Heffernan	29 Jul 2021 14:55	More information needed please.	Needs Work
[Supplier] Bobby Smith	29 Jul 2021 15:09	More information provided.	Submitted
[Buyer] Ronan Heffernan	29 Jul 2021 15:09		Approved
D2: Problem description			
[Supplier] Bobby Smith	29 Jul 2021 14:42		Submitted
[Buyer] Ronan Heffernan	29 Jul 2021 14:55	Satisfied with the information provided.	Approved
D3: Interim Containment Actions			
[Supplier] Bobby Smith	29 Jul 2021 15:09		Submitted
[Buyer] Ronan Heffernan	29 Jul 2021 15:09		Approved

1. **Action Plan Details** – The name of the supplier the Record was issued to, who it was published by and when, and who is allowed to sign off on the Action Plan.
2. **Action Plan Approval** – A history of each section including the work carried out by the supplier and your response to that as well as any comments from both you and supplier.
3. **Close** – Clicking this will end the Action Plan.

Close Action Plan

When you feel everything has been resolved satisfactorily or if you have reached a resolution you are ready to end the process.

When you click 'Close' you are given one final screen to remind you that changes to section status or comments will be possible.



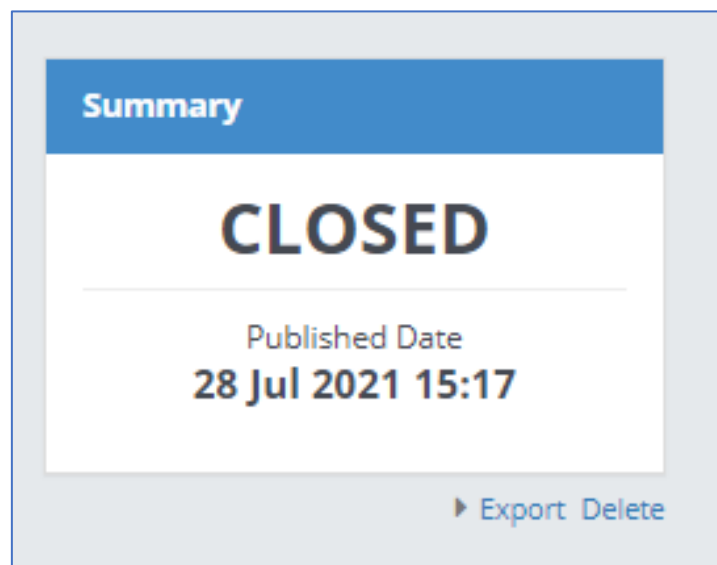
You are about to end this Action Plan.

Please note the following:

- No more supplier responses will be allowed
- Current status of each section will be maintained and no further approvals will be allowed

Are you sure you wish to end this Action Plan Now?

The status of the Action Plan will then change to 'Closed'.



Summary

CLOSED

Published Date
28 Jul 2021 15:17

▶ [Export](#) [Delete](#)

Reactivate

If, further down the line, there is new information to be added the Action Plan can be opened again by clicking 'Reactivate'. This is only useful for allowing a supplier to respond to sections that were not already marked as complete. It is not possible to reopen sections. This can only be done by Action Plans Admins.

Action Plan Record Details Submission Approval

Action Plan Approval Details

Supplier Organisation: **SupplierB (UK)** (view full profile)

Action Plan Published By: Ronan Heffernan

Action Plan Published Date: 28 Jul 2021 15:17

Action Plan Approval Team: Billy Corgan
Group: Ronan Test Group
Ronan Heffernan

Action Plan Approval

User Name	Change Date	Comment	New Status
[Supplier] Bobby Smith	29 Jul 2021 14:42	Team Formation	Submitted
[Buyer] Ronan Heffernan	29 Jul 2021 14:55	More information needed please.	Needs Work

Cancel

If an Action Plan has been sent in error or needs to be cancelled without closing or deleting, you can choose the 'Cancel' option. Once cancelled it cannot be undone but a cancelled Action Plan can be cloned and edited as a new draft.

Summary

PUBLISHED

Published Date
05 Aug 2021 14:07

Save Details

Export Cancel Delete

As part of the cancellation, a message is sent to the supplier.

Are you sure you want to cancel this Action Plan?

Everybody involved with this Action Plan (team members and suppliers) will be notified by email. This action cannot be undone but a cancelled Action Plan can be cloned and edited as a new draft

Cancellation message to Supplier:

Apologies this Action Plan was sent in error

Delete

If you need to permanently delete an Action Plan choose the 'Delete' option. This is permanent and cannot be undone.

Summary

PUBLISHED

Next Due Date
01 Sep 2021 07:53

Published Date
25 Aug 2021 07:53

▶ Export Cancel