



Quick Reference Guide Action Plan

GEP Smart

Invitation Email

You will receive the below invitation email from the buyer to evaluate the Action Plan.

Dear Test Trainer,

An Action Plan document has been published and you are being invited to participate in it and complete the activities assigned to you.

Here are the details:

Published by: Straumann

Action Plan Name: Test QRG action plan

You can use the following link to access the action plan: <https://smartuateu.gep.com/PartnerManagement/ActionPlan/SupplierResponse?dd=YnBjPTcwMDIyMTY1JmRjPTEzNzQmY2M9NTM4OTgxMDQwMDAwMDImc3BjPTUzODk4MQ2&oloc=105&md=bT0xOQ2&cc=XZ5lw5YVQipGmNuvu1eziw==&b=0&c=NzAwMjIxNjU1>

Thank you,

Click the link to respond to the Action Plan.

Viewing Action Plan

As a Supplier, you will receive the Action Plan for evaluation. You can view the Action Plan under My Task.

UAT

Sourcing Contract Supplier

Search

Home

My Tasks **6**

Create

Supplier Profile

My Tasks

DRAFT (0) ACTION PENDING (6) FOLLOW UP (0)

Scorecard	Action Plan	Supplier Profile	Form	Auction
2	1	1	1	1

Scorecard Name	Document Number	Purpose	Frequency	Created By	Modified...	Sta
Training Material Test 1	SCRD-2022.00060	Performance Evaluation		Elias De Ceust...	10/13/2022 0...	Pub
Test scorecard test	SCRD-2022.00057	Performance Evaluation		Vlad-Paul Tan...	10/11/2022 0...	Pub

Rows Per Page: 10 1 - 2 Of 2

Action Pending

As a Supplier, you can view the Action Plan, under the Action Pending tab. Click on the action plan name to begin evaluation.

Click **Action Pending** tab, to view the Action Plan.

The screenshot displays the 'My Tasks' interface for a supplier. At the top, there are navigation tabs for 'Sourcing', 'Contract', and 'Supplier'. A search bar and utility icons are on the right. The left sidebar contains navigation options: Home, My Tasks (with a notification badge of 6), Create, and Supplier Profile. The main content area shows three tabs: 'DRAFT (0)', 'ACTION PENDING (6)', and 'FOLLOW UP (0)'. The 'ACTION PENDING' tab is active and contains five task cards: 'Scorecard' (2), 'Action Plan' (1), 'Supplier Profile' (1), 'Form' (1), and 'Auction' (1). Below these cards is a table with the following data:

Scorecard Name	Document Number	Purpose	Frequency	Created By	Modified...	Sta
Training Material Test 1	SCRD-2022.00060	Performance Evaluation		Elias De Ceust...	10/13/2022 0...	Pu
Test scorecard test	SCRD-2022.00057	Performance Evaluation		Vlad-Paul Tan...	10/11/2022 0...	Pu

At the bottom of the table, there is a pagination control showing 'Rows Per Page: 10' and '1 - 2 Of 2'.

Achieving an Activity

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

The screenshot displays a software interface for managing activities. At the top, there is a header for 'Test QRG' with a 'Training' category and a date of '10/13/2022'. Below this, a comment box shows 'No comments available'. A section titled 'Activities (01)' contains a list of activities. One activity is highlighted, showing 'Test QRG' with a 'Training' category and a date range of '10/13/2022 - 10/13/2022'. A 'Change Status' modal is open over this activity, showing three options: 'To be Started' (selected), 'In progress' (with a '0' next to it), and 'Completed'. An 'Update' button is at the bottom of the modal. An orange arrow points from a text box on the right to the 'Update' button.

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

Version History

Click on the Action menu to view the other option, you can perform on the KPI.

The screenshot displays the 'Test QRG action plan' interface. At the top left, there is a purple icon and the text 'Test QRG action plan'. In the top right corner, there is a blue button labeled 'Version History'. Below this, the 'Objective' is listed as 'Training'. A horizontal line separates this from the 'Category', 'Organization Entity', and 'Regions' sections. The 'Category' section includes 'Procurement' and 'Non-Procurement'. The 'Organization Entity' section includes 'Organization > Straumann Group'. The 'Regions' section includes 'Global'. Below these sections, there is a 'Milestone (01)' section with a dropdown menu set to 'All'. Underneath, there is a 'Test QRG' section with a 'Training' label, a comment box showing 'No comments available', and a clock icon with the date '10/13/2022'. To the right of the clock, it says 'Assigned To: Elias De...' and 'Status: To be Achieved'. At the bottom, there is an 'Activities (01)' section with a 'Test QRG' card. The card has a 'Training' label, a comment box showing 'No comments available', a clock icon with the date range '10/13/2022 - 10/13/2022', and a 'Change Status' button with a dropdown menu showing 'To be Started'.

View the version history of the action plan