



**USER GUIDE
FOR
SUPPLIER PORTAL**



**SHARED APPLICATION SERVICES
INFORMATION TECHNOLOGY
GLOBAL PHARMACEUTICAL OPERATIONS**



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**1. GLOSSARY OF TERMS**

CAPA	Corrective And Preventive Action
CDA	Confidential Disclosure Agreement
GSC	Global Supply chain System
GSSIM	Global Strategic Supplier Information Management
GTM	Global Technology Management
FRS	Functional Requirements Specification
KPI	Key Performance Indicator
PPG	Pharmaceutical Products Group
RB	Review Board
RFI	Request For information
SAS	Shared Application Systems

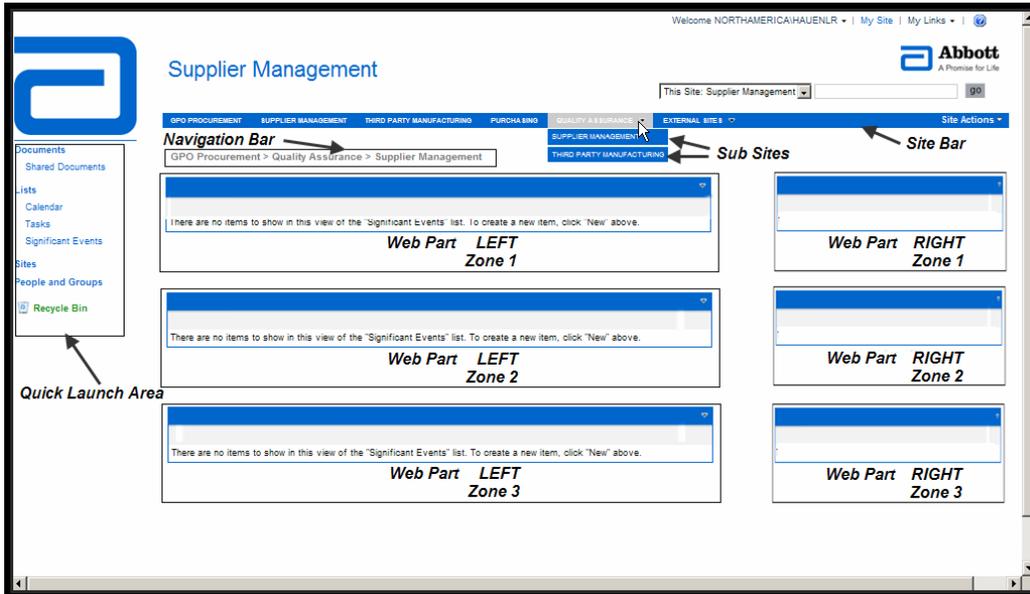


SharePoint	Microsoft SharePoint is a family of software products developed by Microsoft for collaboration, file sharing and web publishing. The current version is WSS 3.0 and is configured for use with Microsoft Office 2003.
SLC	System life Cycle
SME	Subject Matter Expert
SQAE	Software Quality Assurance Engineer
SRM	Supplier Resource Management
TPM	Third Party Manufacturer
URS	User Requirements Specification
VMI	Vendor Managed Inventory
WSS	Windows SharePoint Services



2. BASIC FUNCTIONS

2.1. SharePoint Layout



2.1.1. Site Bar

- The Site Bar is a series of links for all web sites created for this group.
- These sites are created as shown in Section 2.11 (**Create Additional Sites**).
- Note: If **Site Actions** is displayed on the menu bar, then the user has administration rights to modify SharePoint elements.





- Note: If **Site Actions** is not available on the menu bar, users only have **Read** or **Contribute** rights to the site.



2.1.2. Sub-Sites

- Sub-sites are user-defined pages created for any of the sites listed on the site bar.
- Sub-sites are created by anyone with Administrative privileges.

2.1.3. Navigation Bar

- The navigation bar indicates where the user is currently located within a site.
- Click on the appropriate link on the navigation bar to return or jump back to another location within the site group.

2.1.4. Quick Launch Area

- Specific libraries, surveys, and links are accessed from the Quick Launch area.
- During the creation of libraries, surveys, links, etc., the user selects whether or not the item appears in the Quick Launch area.

2.1.5. Web Part Horizontal Zones – Left/Right

- A SharePoint site is divided into two horizontal zones – Left and Right.
- Whenever a SharePoint page is modified, a web part can either be moved or added to one of these zones.
- Clicking on the **Add a Web Part** in the Left zone creates the web part in that zone. Similarly, clicking on the **Add a Web Part** in the right zone creates the web part in that zone.



- For more details concerning Web Part placement, refer to the Section 2.6 **Web Parts**.

2.1.6. Web Part Vertical Zones – 0, 1, 2, 3, ... n

- The left and right zones also have vertical zones.
- These zones are numbered sequentially, beginning with zone “0.” Depending on the template used for the site, the zones have a specific limit.
- Notify the SharePoint Administrator for the current number of allowable zones.
- Notify the SharePoint Administrator is additional vertical zones are required.
- Good web design suggests minimum scrolling. Therefore, few zones are preferable.

2.2. Document Libraries

2.2.1. Create a Document Library

- Users must have Administrator privilege for this action.
- Click on **Site Actions** located on the extreme right of the site navigation bar. If **Site Actions** is not available, then Administration rights are not extended to the user.
- In the pull-down menu, click on **View All Site Content**



Site Actions

- Create Page**
Create a page in this site.
- Edit Page**
Add, remove, or update Web Parts on this page.
- View All Site Content**
View all libraries and lists in this site.
- View Reports**
View reports on documents, pages and tasks.
- Site Settings**
Manage site settings on this site.
- Manage Content and Structure**
Reorganize content and structure in this site collection.

- In the All Site Content screen, click on **Create**



Create	
Name	Description
Document Libraries	
Documents	This system libra documents that a
Form Templates	This library conta activated to this s
GPO Terms and Acronyms	This Wiki library
Images	This system libra images that are u
News Letters	
Pages	This system libra pages that are cr
Risk Assessment	

- The Create page offers several items to create: Libraries, Communications, Tracking, Custom Lists, and Web pages. Under the heading **Libraries**, click on **Document Library**



Create



Document Library
Create a document library when you have a
Document libraries support features such as

Libraries	Communications
<input checked="" type="checkbox"/> <u>Document Library</u>	<input type="checkbox"/> Announcements
<input type="checkbox"/> Form Library	<input type="checkbox"/> Contacts
<input type="checkbox"/> Wiki Page Library	<input type="checkbox"/> Discussion Board
<input type="checkbox"/> Picture Library	
<input type="checkbox"/> Data Connection Library	

- In the **Name** box, type a unique name as it will appear in headings and links throughout the site.



Name:

Description:

 Display this document library on the Quick Launch?
 Yes No

Create a version each time you edit a file in this document library?
 Yes No

Document Template:

- In the **Description** box, type a comprehensive description to help visitors understand the type of files to be included in this library.
- Determine the **Navigation**.
 - If this library requires frequent accessing for document storage and retrieval, allow the library to be available in the Quick Launch area. Make sure **Yes** (the default value) is selected.
 - Generally, libraries are part of specific SharePoint pages and are accessed by navigating to the specific page. Although **Yes** is the default value, it is more likely not to be in the Quick Launch area. So **No** should be the response.
- Use the default link for **Document Template**



- If a new version is required after each edit, click **Yes** in the Document Version History section.
- Click **Create**. The new library page is displayed. It is now ready to have files uploaded. Refer to the “Upload a file of files to a library” section that follows.

GPO Procurement Home > SharePoint Training Documentation

SharePoint Training Documentation

This library consists of all available GPO SharePoint training materials.

New	Upload	Actions	Settings	View: All Documents
Type	Name	Modified	Modified By	Comments

There are no items to show in this view of the "SharePoint Training Documentation" document library. To create a new item, click "New" or "Upload" above.

2.2.2. Delete/Remove a Document library

- Must have Administrator privilege for this action.
- Navigate to the desired page (site) where the unwanted library resides.
- Click on **Site Actions** located on the extreme right of the site navigation bar. If **Site Actions** is not available, then Administration rights are not extended to the user.
- In the pull-down menu, click on **View All Site Content**



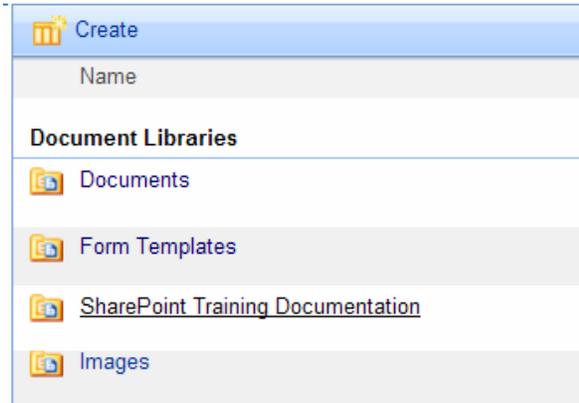
Site Actions

- Create Page**
Create a page in this site.
- Edit Page**
Add, remove, or update Web Parts on this page.
- View All Site Content**
View all libraries and lists in this site.
- View Reports**
View reports on documents, pages and tasks.
- Site Settings**
Manage site settings on this site.
- Manage Content and Structure**
Reorganize content and structure in this site collection.

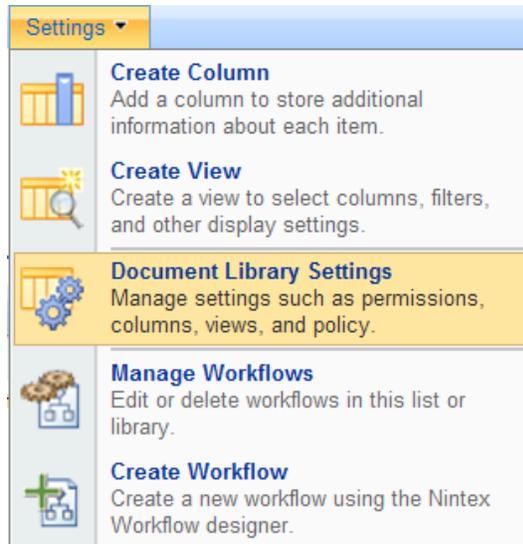
- Click on the library name to be deleted. In the example below, delete the **Documents** library



GPO Procurement Home > All Site Content
All Site Content



- Click on SharePoint Training Documentation
- Click on Document Library Settings



- The Customize page appears. Under the Permissions and Management section, select **Delete this document library**



Customize SharePoint Training Documentation

List Information

Name: SharePoint Training Documentation
Web Address: [http://ww00130d:16787/SharePoint Training Documentation/Forms/AllItems.aspx](http://ww00130d:16787/SharePoint%20Training%20Documentation/Forms/AllItems.aspx)
Description: This library consists of all available GPO SharePoint training materials.

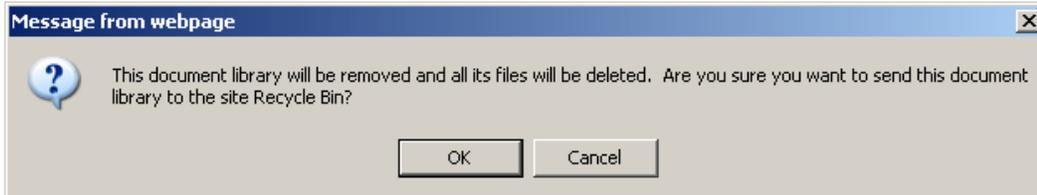
General Settings

- Title, description and navigation
- Versioning settings
- Advanced settings

Permissions and Management

- [Delete this document library](#)
- [Save document library as template](#)
- [Permissions for this document library](#)

- Deleting a library also deletes all files in the library. It is not necessary to have an empty library before deletion.. Make certain that any required files are moved to another library. SharePoint does issue a warning prior to deletion.



- Click OK to delete the selected library.
- A deleted library goes to the Recycle Bin and can be restored with all files (if any) intact. Follow the procedure in **Section 2.5.2 Restore a Deleted Item**.

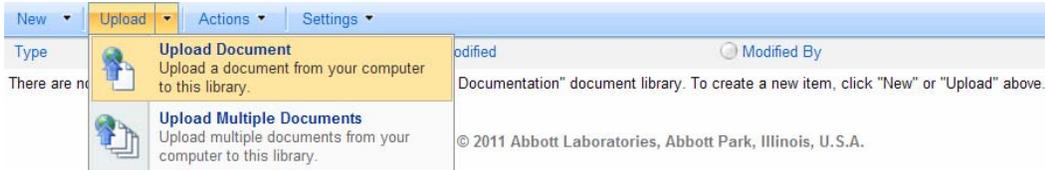
2.2.3. Upload a single file to a library

- SharePoint limits the size of the files to be uploaded. If the files did not successfully upload, contact the SharePoint Administrator to allow larger

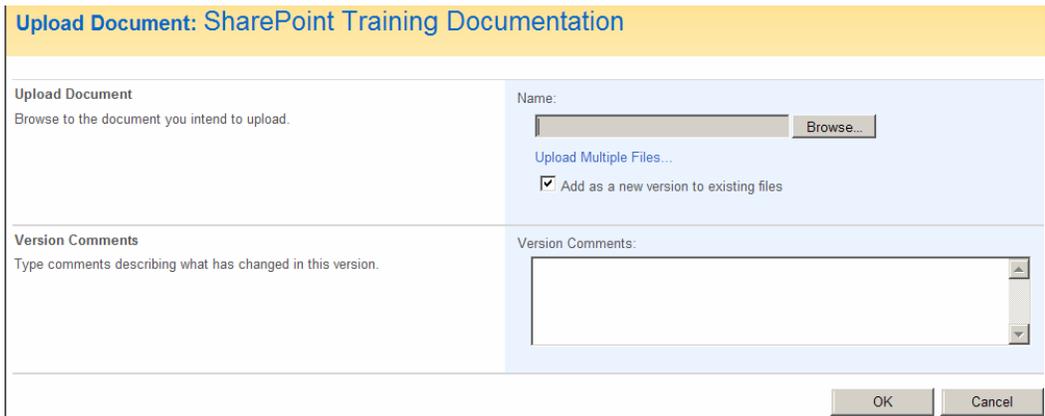


upload file sizes. SharePoint does not issue warnings when files do not upload.

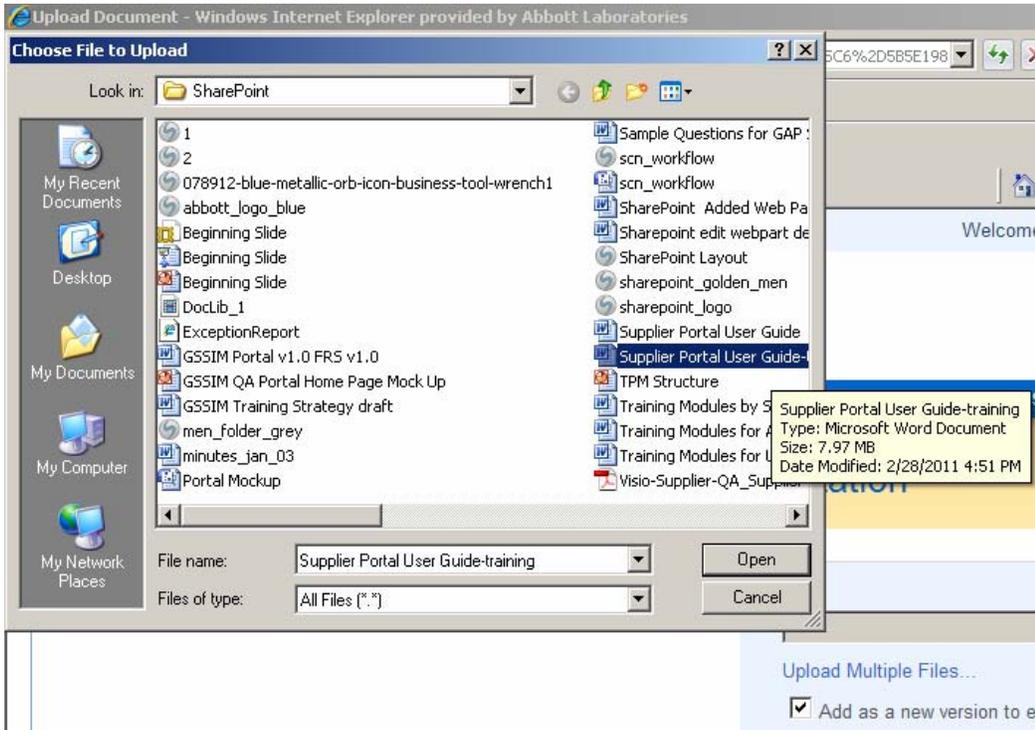
- Navigate to the library, and use one of the following two methods for a single file upload.
- Either click on the **Upload** button once or click on the **Upload** down arrow and select **Upload Document**.



- In the **Upload Document** section, click **Browse**.



- In the **Choose File to Upload** dialog box, browse to the location of the file you want to upload, select the file, and click **Open**.



- Then click **OK**.

SharePoint Training Documentation: Supplier Portal User Guide-training

The document was uploaded successfully. Use this form to update the properties of the document.

OK Cancel

Delete Item Spelling... * indicates a required field

Name *	Supplier Portal User Guide-training .doc
Title	SYSTEM ARCHITECTURE DESCRIPTION
Comments	

Version: 0.1
Created at 3/1/2011 10:03 AM by
Last modified at 3/1/2011 10:03 AM by

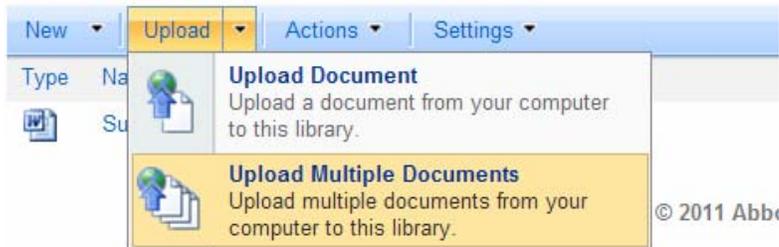
OK Cancel



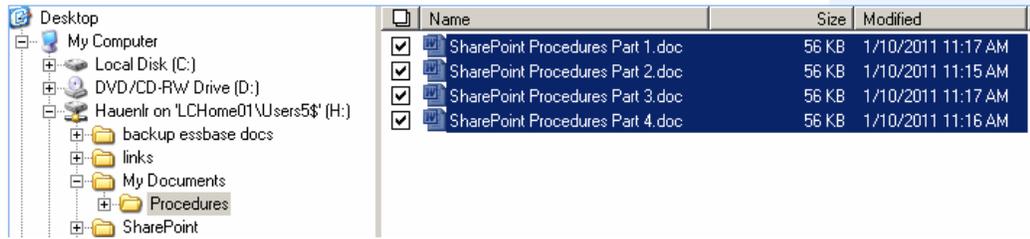
- Certain file types may be blocked from uploading into any library. This is set by the site administrator or SharePoint IT administrator. If there is a need for a “blocked” file type to be uploaded, contact the appropriate administrator.

2.2.4. Upload multiple files to a library

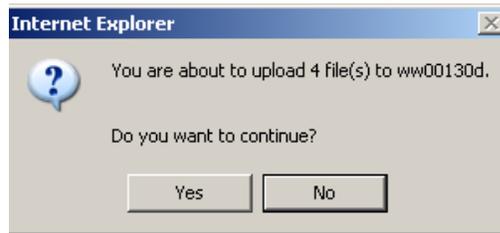
- SharePoint limits the total size of the uploaded files. If the files did not successfully upload, contact the SharePoint Administrator to allow larger download sizes. SharePoint does not issue warnings when files do not upload.
- If the total upload is too large while uploading multiple files, try uploading fewer files at a time
- Certain file types may be blocked from uploading into a library. File type authorization is set by the site administrator or SharePoint IT administrator. If there is a need for a “blocked” file type to be uploaded, contact the appropriate administrator.
- Navigate to the library and click on the arrow for the pull-down menu. **Select Upload Multiple Documents.**



- In the **Upload Documents** section, click **Browse**.
- In the **Choose File to Upload** dialog box, navigate to the location of the files to be uploaded, select the files by clicking on the box preceding the file name. In this example, four files are being uploaded. A check mark will appear in the selected files. Click **Open**. Then click **OK**



- An alert message appears verifying the upload. If there are no problems with the selected files, click **Yes**.



- The library now has five documents available for sharing.

SharePoint Training Documentation

This library consists of all available GPO SharePoint training materials.

Type	Name	Modified
	SharePoint Procedures Part 1 NEW	3/1/2011 10:13 AM
	SharePoint Procedures Part 2 NEW	3/1/2011 10:13 AM
	SharePoint Procedures Part 3 NEW	3/1/2011 10:13 AM
	SharePoint Procedures Part 4 NEW	3/1/2011 10:13 AM
	Supplier Portal User Guide-training NEW	3/1/2011 10:05 AM

2.2.5. Check out a file

- In the **Document Library Settings**, the library can be set to force the user to check out a file before it can be edited.



- View All Site Content -> *library name* -> Document Library Settings -> Versioning Settings -> *Require documents to be checked out before editing?*

SharePoint Training Documentation

This library consists of all available GPO SharePoint training materials.

Type	Name
	SharePoint Procedures Part 1
	SharePoint Procedures Part 2
	SharePoint Procedures Part 3
	SharePoint Procedures Part 4
	Supplier Portal User Guide-traini

Settings

- Create Column**
Add a column to store additional information about each item.
- Create View**
Create a view to select columns, filters, and other display settings.
- Document Library Settings**
Manage settings such as permissions, columns, views, and policy.
- Manage Workflows**
Edit or delete workflows in this list or library.
- Create Workflow**
Create a new workflow using the Nintex Workflow designer.

List Information

Name: SharePoint Training Document
Web Address: http://ww00130d:16787/SharePoint
Description: This library consists of all available GPO SharePoint training materials.

General Settings

- Title, description and navigation
- Versioning settings
- Advanced settings
- Manage item scheduling
- Audience targeting settings



Document Library Versioning Settings: SharePoint Training Documentation

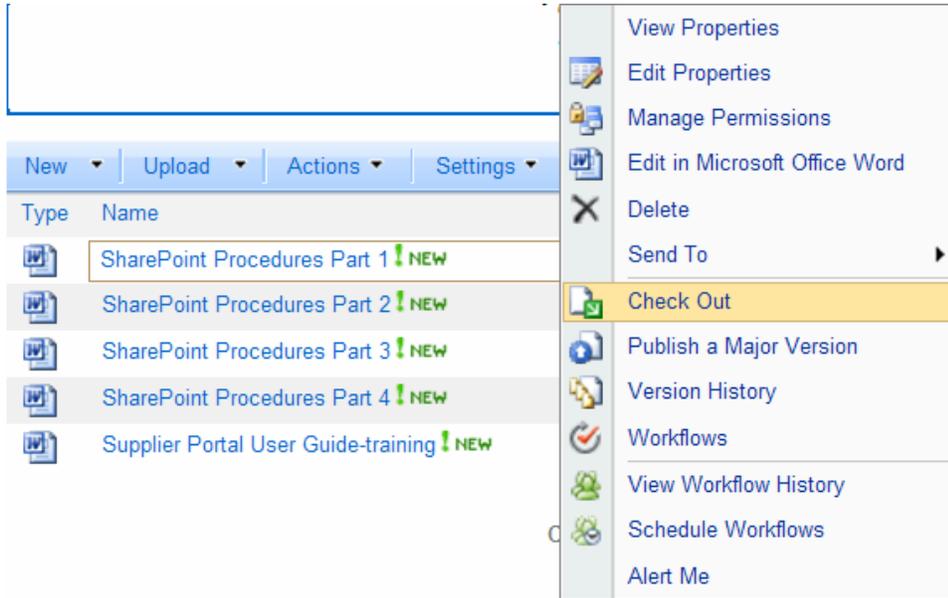
<p>Content Approval</p> <p>Specify whether new items or changes to existing items should remain in a draft state until they have been approved. Learn about requiring approval.</p>	<p>Require content approval for submitted items?</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p>
<p>Document Version History</p> <p>Specify whether a version is created each time you edit a file in this document library. Learn about versions.</p>	<p>Create a version each time you edit a file in this document library?</p> <p><input type="radio"/> No versioning</p> <p><input type="radio"/> Create major versions Example: 1, 2, 3, 4</p> <p><input checked="" type="radio"/> Create major and minor (draft) versions Example: 1.0, 1.1, 1.2, 2.0</p> <p>Optionally limit the number of versions to retain:</p> <p><input checked="" type="checkbox"/> Keep the following number of major versions: <input type="text" value="5"/></p> <p><input checked="" type="checkbox"/> Keep drafts for the following number of major versions: <input type="text" value="5"/></p>
<p>Draft Item Security</p> <p>Drafts are minor versions or items which have not been approved. Specify which users should be able to view drafts in this document library. Learn about specifying who can view and edit drafts.</p>	<p>Who should see draft items in this document library?</p> <p><input checked="" type="radio"/> Any user who can read items</p> <p><input type="radio"/> Only users who can edit items</p> <p><input type="radio"/> Only users who can approve items (and the author of the item)</p>
<p>Require Check Out</p> <p>Specify whether users must check out documents before making changes in this document library. Learn about requiring check out.</p>	<p>Require documents to be checked out before they can be edited?</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p>

OK

Cancel

- Navigate to the library that holds the document you need to check out.
- Position the mouse pointer over the desired file, click the drop-down arrow, and select **Check Out**.

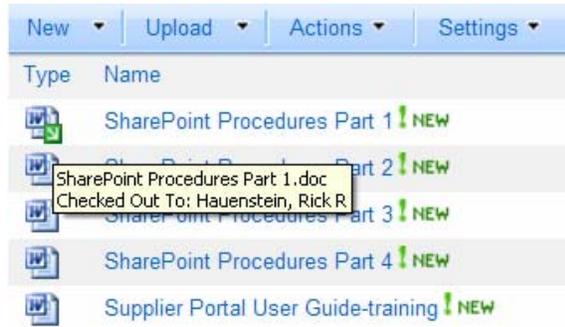
New			Upload			Actions			Settings		
Type	Name										Modified
	SharePoint Procedures Part 1	NEW									3/1/2011 10:13 AM
	SharePoint Procedures Part 2	NEW									3/1/2011 10:13 AM
	SharePoint Procedures Part 3	NEW									3/1/2011 10:13 AM
	SharePoint Procedures Part 4	NEW									3/1/2011 10:13 AM
	Supplier Portal User Guide-training	NEW									3/1/2011 10:05 AM



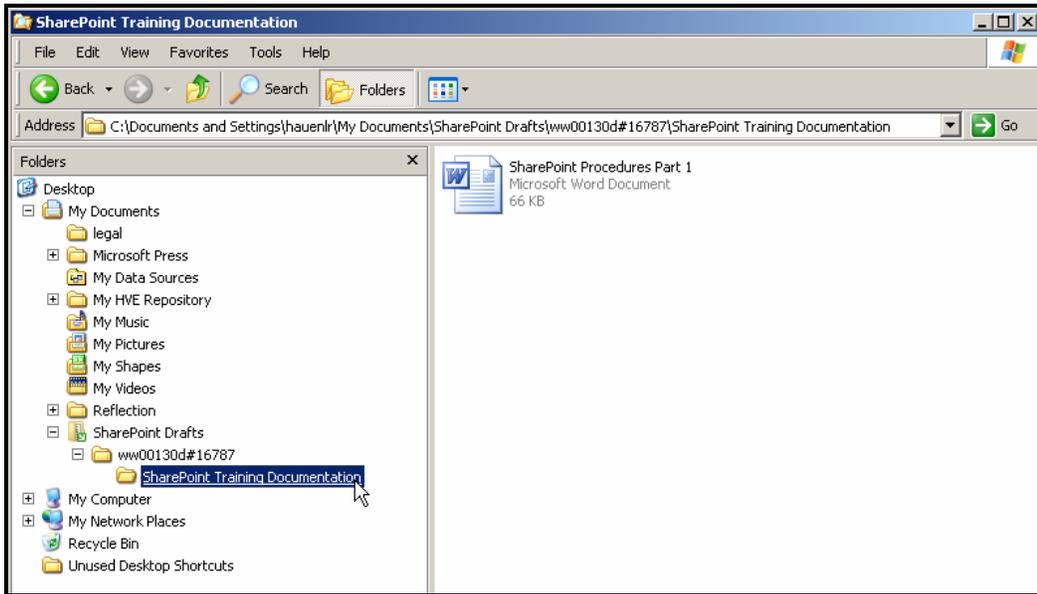
- An alert message appears. If the checked-out version goes into the predetermined “drafts folder,” check the box. This is recommended and it is the default value.



- A green arrow appears on the file’s icon, indicating it has been checked out.
- Hover the cursor over the checked icon and the file name appears, in addition to the message “Checked Out To: *user name*”



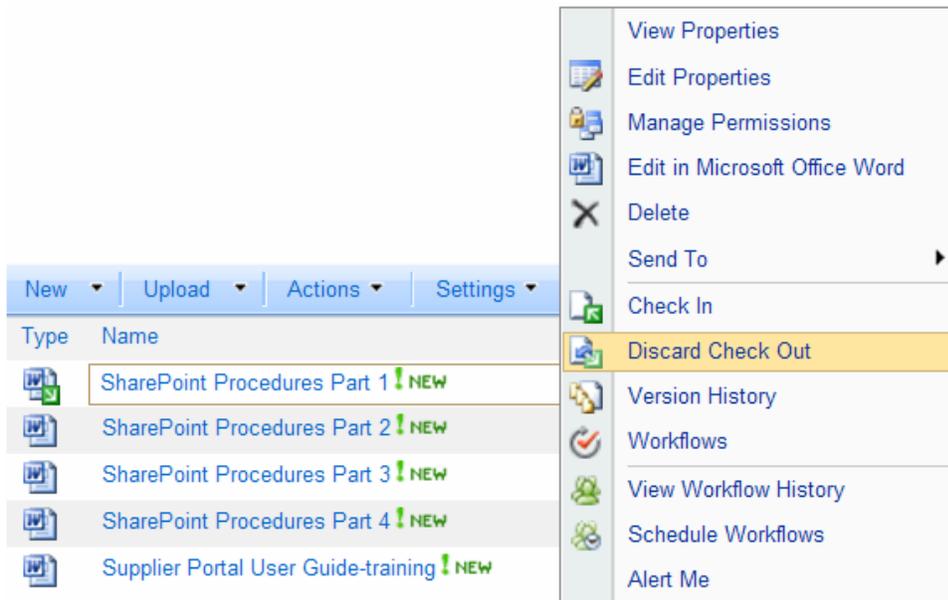
- When a file is checked out, a copy of the file is created and inserted into the library in place of the original file. A checked-out file can only be modified by the user who checked out the file. All other users only have “Read” privileges to that copy.
- Do not edit a document unless it is checked out. SharePoint allows direct editing but the document must be protected so multiple users cannot make changes to the same file at the same time. If this should happen, the edits from the last person will be the edits that appear on the file. All other edits will be lost.
- By default, the checked out file is stored in the SharePoint (**SharePoint Drafts**) folder on the user’s local “C” drive as shown:



- Do not access this file directly. Instead, return to SharePoint and click on the checked-out file. The edits will be made to the file located in the default folder. The path to this file must be unchanged in order for SharePoint to know where to place the edited file, either back in the default folder or back into SharePoint if the file is ready to be checked-in.
- The illustrations in this user’s guide are for **Office 2003**. Other **Office** versions may set the “offline edits” to another location. However, regardless of location, the folder will still be named **SharePoint Drafts**.

2.2.6. Cancel a file check out

- Navigate to the library that holds the document you need to cancel check out.
- Position the mouse pointer over the file, click the drop-down arrow, and select **Discard Check Out**.

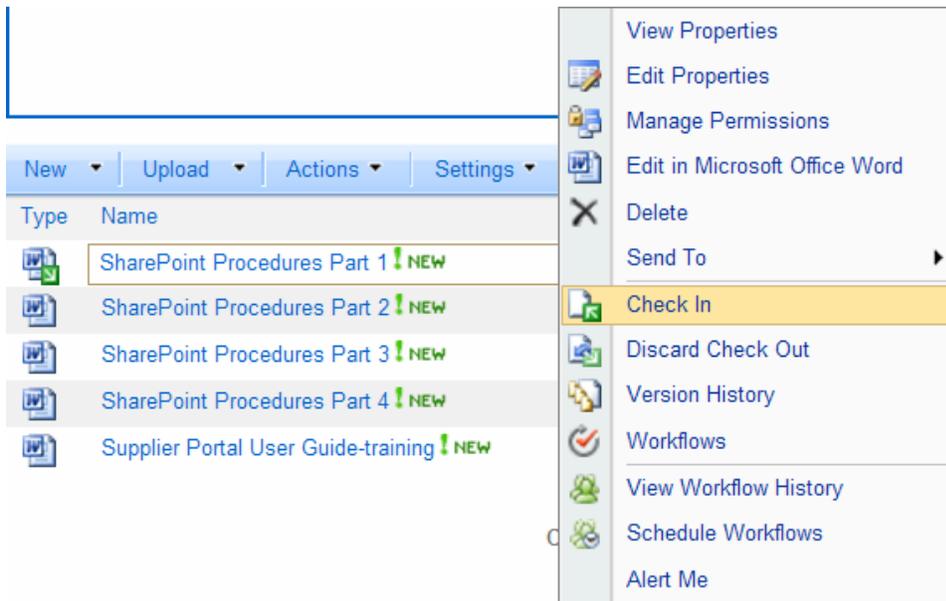


- Click **OK**.

2.2.7. Check in a file

Note 1: Checking out a file prevents multiple people from making changes at the same time, which helps avoid conflict and confusion over changes. Checking files in and out gives more control for tracking versions. A version is created only when a file is checked in, not each time that a file is opened or closed for direct editing.

- Navigate to the library where the file is located. Position the cursor over the desired file. Click the drop-down arrow, and select **Check In**.



- The **Check In** screen is displayed.

Check in

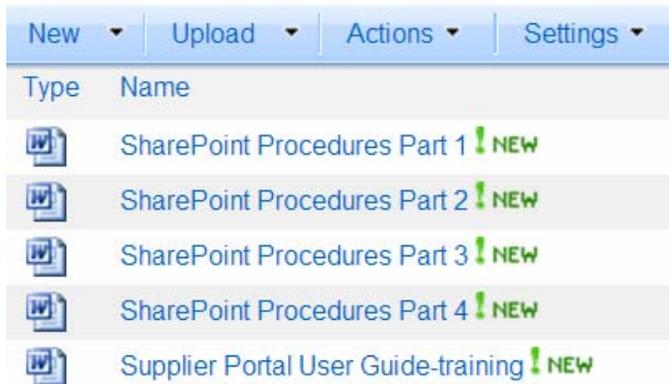
Use this page to check in a document that you have currently checked out.

Document Check In Other users will not see your changes until you check in. Specify options for checking in this document.	What kind of version would you like to check in? <input checked="" type="radio"/> 0.3 Minor version (draft) <input type="radio"/> 1.0 Major version (publish) <input type="radio"/> 0.2 Overwrite the current minor version Keep the document checked out after checking in this version? <input type="radio"/> Yes <input checked="" type="radio"/> No
Comments Type comments describing what has changed in this version.	Comments: <input type="text"/>

OK Cancel



- If on-going changes are required to the document, check **Keep the document checked out after checking in this version**. This allows the user to continue making changes while locking the document from other users until all changes are made. At the same time, the document is available for sharing as it is continually being updated.
- Add **Comments** to describe any changes or additional instructions related to this document
- Click **OK**. The file has now been checked in. Note that the green arrow is no longer present.

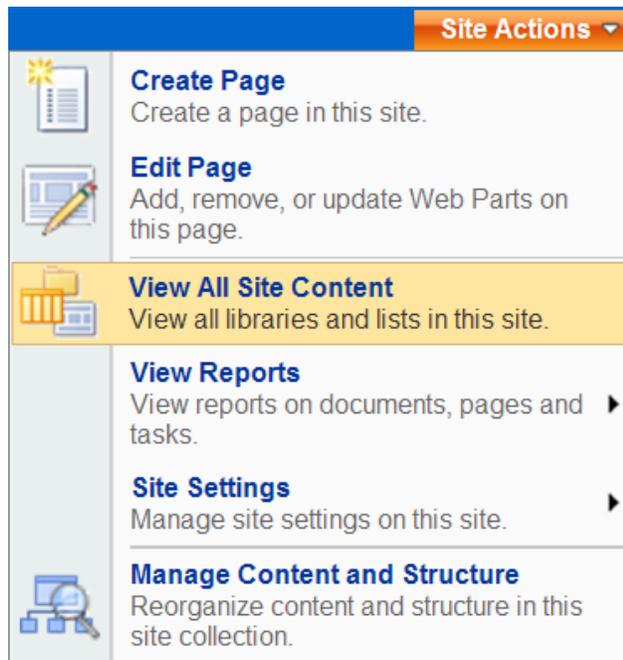


2.3. Picture (Image) Libraries

2.3.1. Create a Picture Library

Note: All photos, artwork, logos, etc. that are to be used on the Sharepoint sites must first reside in a Picture Library.

- Must have Administrator privilege for this action.
- Click on **Site Actions** located on the extreme right of the site navigation bar. If **Site Actions** is not available, then Administration rights are not extended to the user.
- In the pull-down menu, click on **View All Site Content**



- In the All Site Content screen, click on **Create**



- The Create page offers several items to create: Libraries, Communications, Tracking, Custom Lists, and Web pages. Under the heading **Libraries**, click on **Picture Library**



Create



Picture Library

Create a picture library when you have pictures you want to share. Picture libraries provide special features for managing and displaying pictures, such as thumbnails, download options, and a slide show.

Libraries	Communications	Tracking	Custom Lists
<input type="checkbox"/> Document Library	<input type="checkbox"/> Announcements	<input type="checkbox"/> Links	<input type="checkbox"/> Custom List
<input type="checkbox"/> Form Library	<input type="checkbox"/> Contacts	<input type="checkbox"/> Calendar	<input type="checkbox"/> Custom List in Datashe
<input type="checkbox"/> Wiki Page Library	<input type="checkbox"/> Discussion Board	<input type="checkbox"/> Tasks	<input type="checkbox"/> Languages and Transla
<input checked="" type="checkbox"/> <u>Picture Library</u>		<input type="checkbox"/> Project Tasks	<input type="checkbox"/> KPI List
<input type="checkbox"/> Data Connection Library		<input type="checkbox"/> Issue Tracking	<input type="checkbox"/> Lot Performance
<input type="checkbox"/> Translation Management		<input type="checkbox"/> Survey	<input type="checkbox"/> SignificantEvents

- In the **Name** box, type a unique name as it will appear in headings and links throughout the site.



Name:
SharePoint Images and Pictures

Description:
All graphics relating to SharePoint are stored in this library.

 Display this picture library on the Quick Launch?
 Yes No

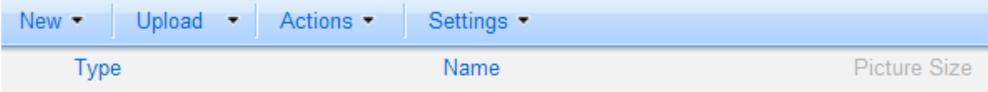
Create a version each time you edit a file in this picture library?
 Yes No

- In the **Description** box, type a comprehensive description to help visitors understand the type of files to be included in this library.
- Multiple picture libraries can be created.
- Generally, the Picture Library is hidden. Select **No**, unless the Picture Libraries should be visible in the Quick Launch area.
- If a new version is required after each edit, click **Yes** in the Document Version History section.
- Click on the **Create** button. The new library page is displayed. It is now ready to have files uploaded.



SharePoint Images and Pictures

All graphics relating to SharePoint are stored in this library.

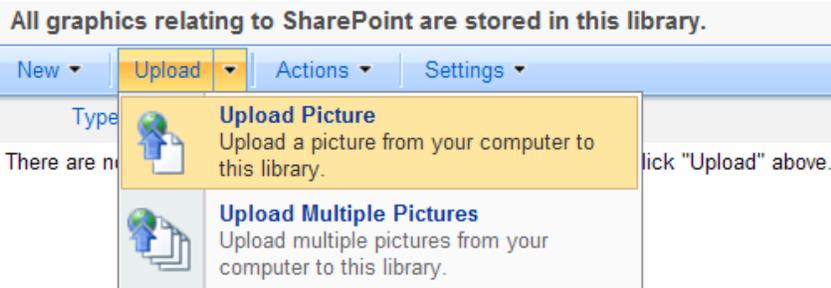


There are no pictures to show in this view. To add a new picture, click "Upload" above.

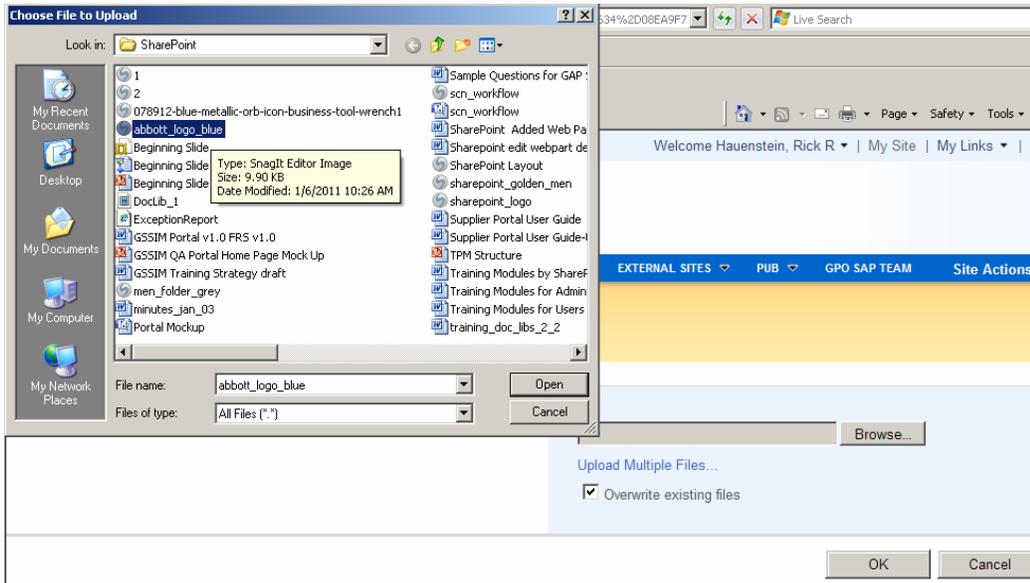
2.3.2. Add Images to the Picture Library – Single

- Navigate to the Picture library and select **Upload**, then **Upload Picture**

SharePoint Images and Pictures



- Browse to the picture's location, highlight the picture, and click **OK**. (Or double-click on the picture.)





SharePoint Images and Pictures: abbott_logo_blue

The document was uploaded successfully. Use this form to update the properties of the document.

OK Cancel

Delete Item | Spelling... * indicates a required field

Name * .JPG



Title

Date Picture Taken

Description

Used as alternative text for the picture.

Keywords

For example: scenery, mountains, trees, nature

Created at 3/1/2011 1:02 PM by
Last modified at 3/1/2011 1:02 PM by

OK Cancel

- All fields are optional:



- Title
- Date Picture Taken
- Description
- Keywords
- Click **OK** to upload the picture into the Picture Library.
- One graphic is now in the picture Library.

SharePoint Images and Pictures

All graphics relating to SharePoint are stored in this library.

New ▾	Upload ▾	Actions ▾	Settings ▾
Type	Name		Picture Size
	abbott_logo_blue NEW		421 x 344

2.3.3. Add Images to the Picture Library – Multiple

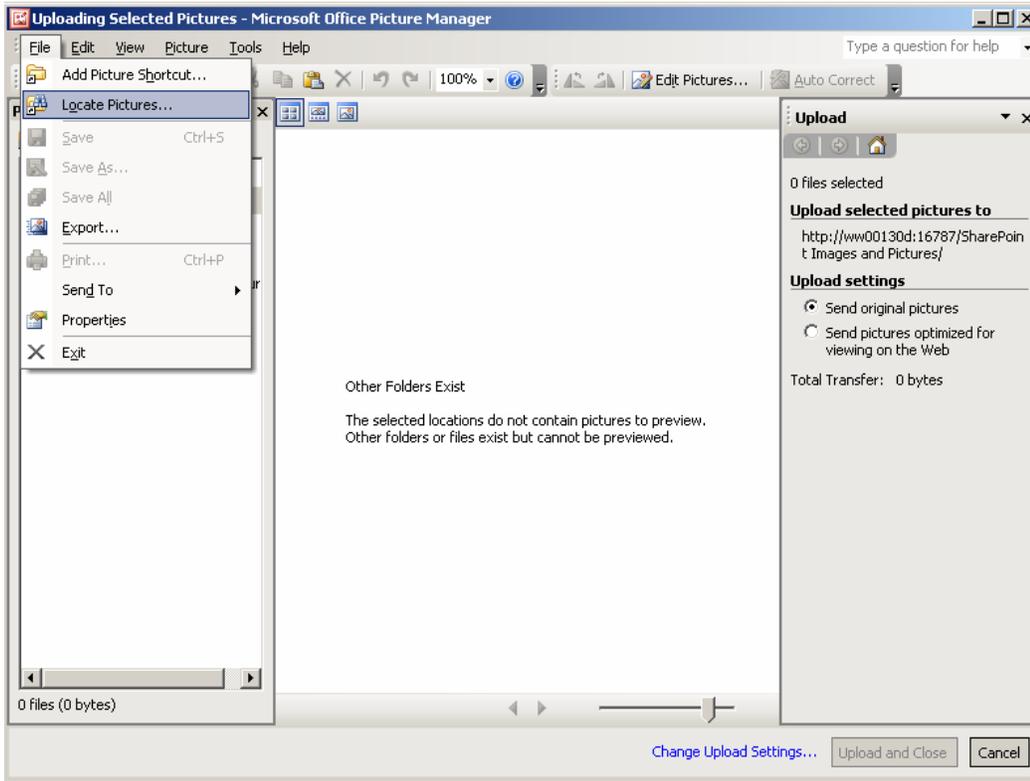
- Navigate to the Picture library and select **Upload**, then **Upload Multiple Pictures**

SharePoint Images and Pictures

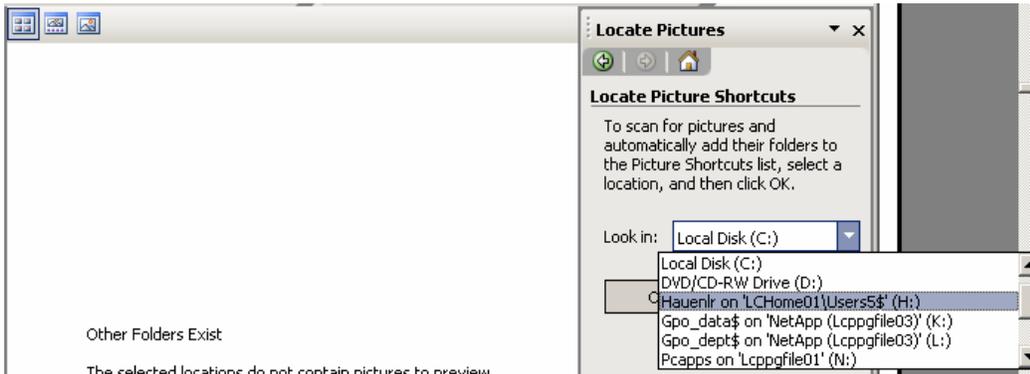
All graphics relating to SharePoint are stored in this library.

New ▾	Upload ▾	Actions ▾	Settings ▾
Type	Name		Picture Size
		Upload Picture Upload a picture from your computer to this library.	421 x 344
		Upload Multiple Pictures Upload multiple pictures from your computer to this library.	

- This opens the Microsoft Picture Manager. If the default location for the pictures is not set, go to **File, Locate Pictures . . .**

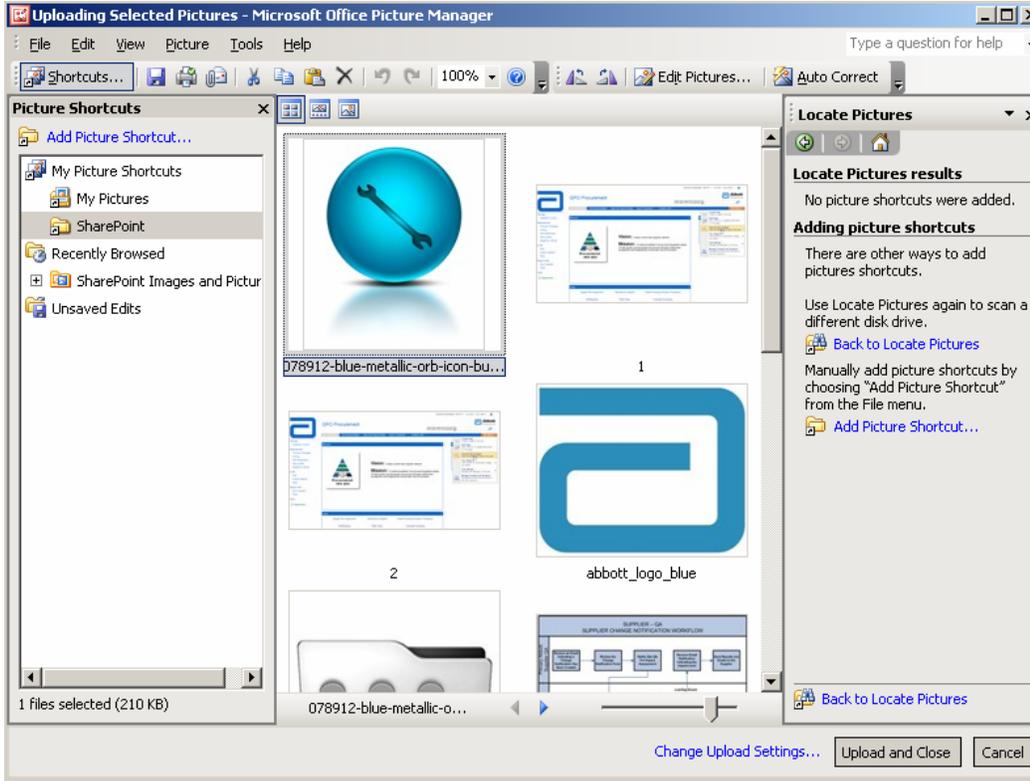


- The **Locate Pictures** bar opens (right side of the screen) and allows navigation to the pictures' locations.





- The **Picture Shortcuts** bar (on the left side of the screen) displays all of the directories that contain images. In this example, the SharePoint directory contains the pictures to be uploaded.



- Select each picture to be downloaded by clicking on the image (or file name) and holding down the Ctrl key. Note that four images to be uploaded are highlighted below.



- Click **Upload and Close** to upload the pictures into the SharePoint Picture library.

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- The Picture Library now contains five uploaded pictures



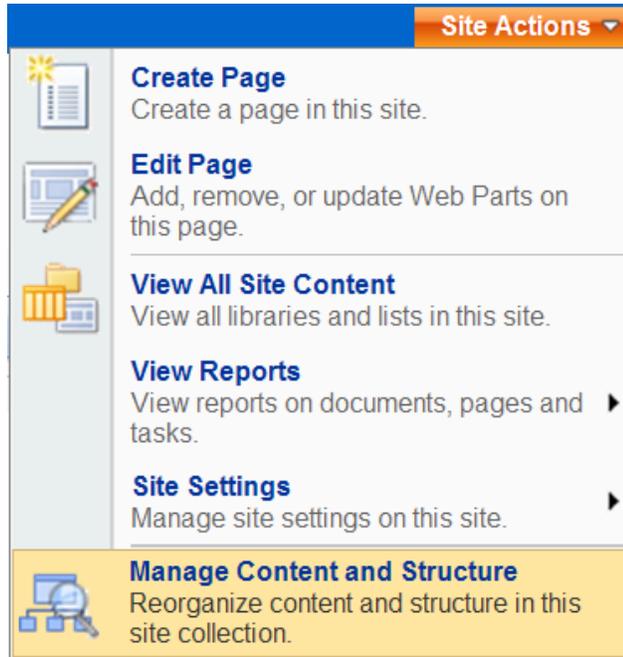
SharePoint Images and Pictures

All graphics relating to SharePoint are stored in this library.

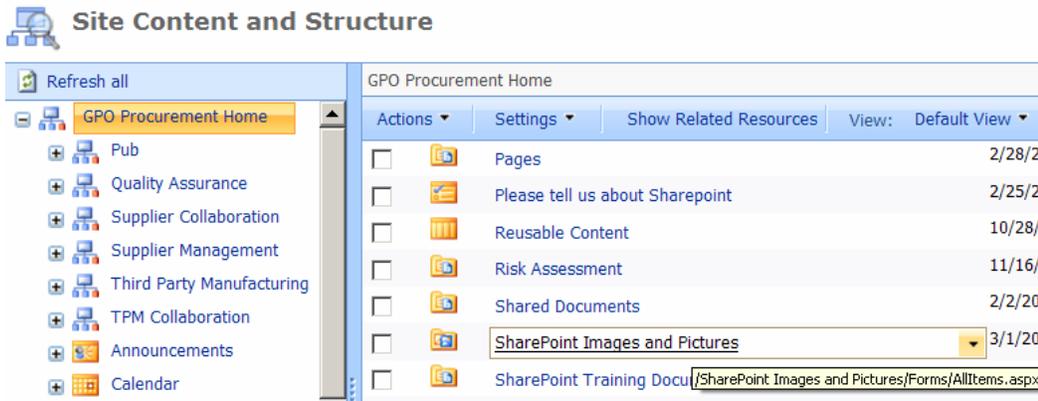
Type	Name
	078912-blue-metallic-orb-icon-business-tool-wrench1 ! NEW
	abbott_logo_blue ! NEW
	men_folder_grey ! NEW
	sharepoint_golden_men ! NEW
	sharepoint_logo ! NEW

2.3.4. Add Images to the Picture library – Manage Content and Structure

- Navigate to the desired site, click **Manage Content and Structure** in the **Site Actions** drop down menu



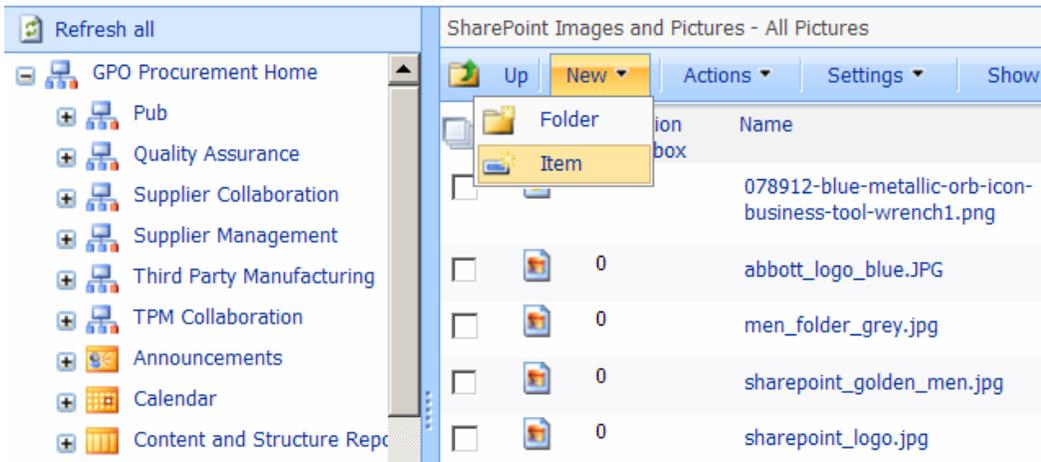
- Click SharePoint Images and Pictures



- On the toolbar, click **New** and select **Item**.



Site Content and Structure



- In the **Upload Document** section, click **Browse**.

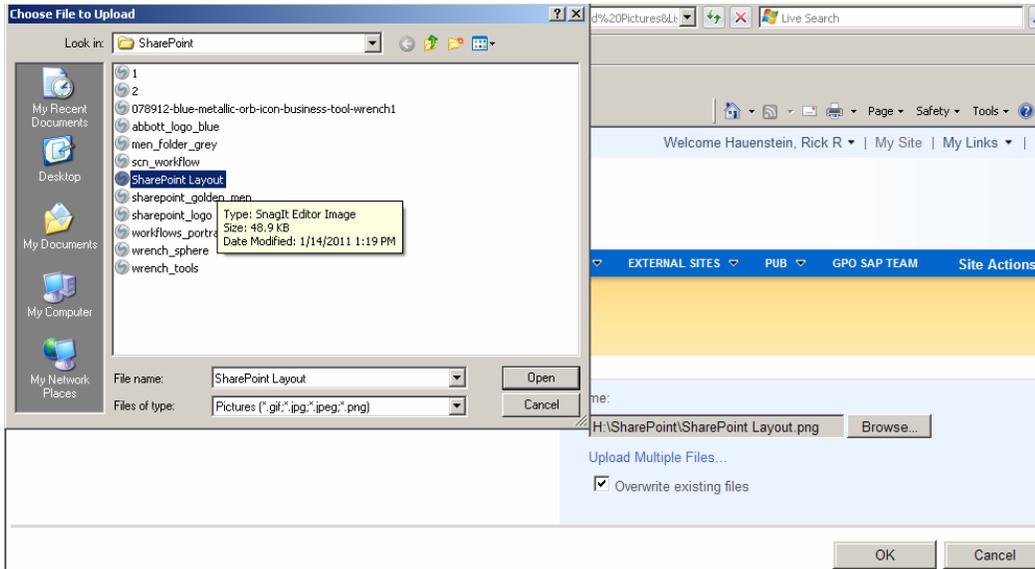
Add Picture: SharePoint Images and Pictures

Upload Document
Browse to the picture you intend to upload.

Name:

Upload Multiple Files...
 Overwrite existing files

- In the **Choose File to Upload** dialog box, browse to the location of the image file you want to upload, select the file, and click **Open**.
- For this example, upload the **SharePoint Layout** image file.



- Click **OK**.



SharePoint Images and Pictures: **SharePoint Layout**

The document was uploaded successfully. Use this form to update the properties of the document.

OK Cancel

Delete Item | Spelling...

* indicates a required field

Name *	SharePoint Layout .png
Preview	
Title	<input type="text"/>
Date Picture Taken	<input type="text"/> 12 AM 00
Description	<input type="text"/> Used as alternative text for the picture.
Keywords	<input type="text"/> For example: scenery, mountains, trees, nature

Created at 3/1/2011 2:24 PM by
Last modified at 3/1/2011 2:24 PM by

OK Cancel

- All fields are optional:
 - Title
 - Date Picture Taken
 - Description
 - Keywords
- Click **OK** to upload the picture into the Picture Library.
- This graphic is now in the picture Library.



- The **Sharepoint Layout** file now appears in the picture library.

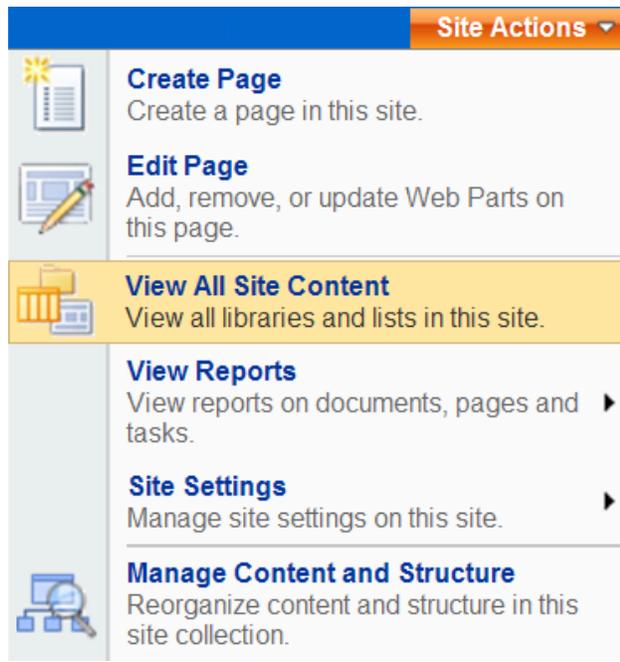
SharePoint Images and Pictures

All graphics relating to SharePoint are stored in this library.

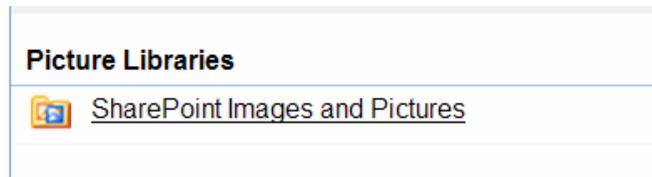
Type	Name
	078912-blue-metallic-orb-icon-business-tool-wrench1 ! NEW
	abbott_logo_blue ! NEW
	men_folder_grey ! NEW
	SharePoint Layout ! NEW
	sharepoint_golden_men ! NEW
	sharepoint_logo ! NEW

2.3.5. Add Images to the Picture library – View All Site Content (Alternate)

- Navigate to the desired site, click **View All Site Content** in the **Site Actions** drop down menu



- Click the [SharePoint Images and Pictures](#) link.

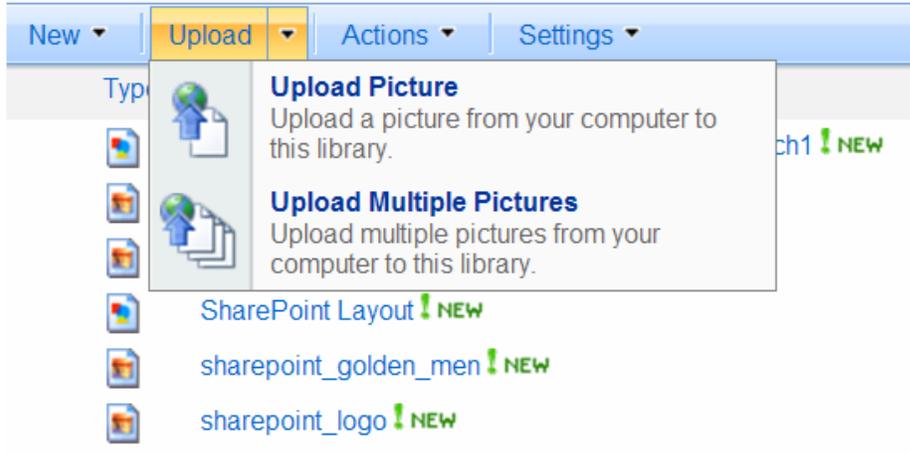


- On the [Sharepoint Images and Pictures](#) page, click Upload (select either Upload Document or Upload Multiple Documents)



SharePoint Images and Pictures

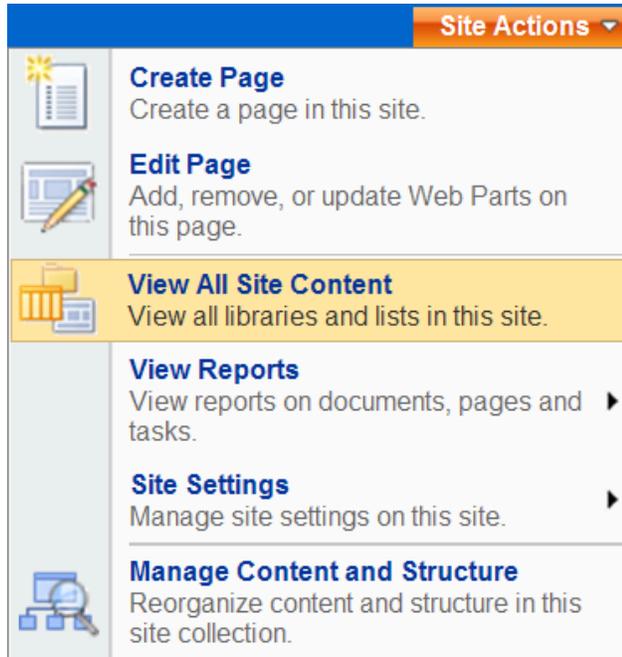
All graphics relating to SharePoint are stored in this library.



- [From this point forward, the procedure for both single picture uploads and multiple picture uploads is identical to the procedure in Section 2.3.2 and Section 2.3.3.](#)

2.3.6. Delete/Remove a Picture library

- Must have Administrator privilege for this action.
- Navigate to the desired page (site) where the unwanted library resides.
- Click on **Site Actions** located on the extreme right of the site navigation bar. If **Site Actions** is not available, then Administration rights are not extended to the user.
- In the pull-down menu, click on **View All Site Content**



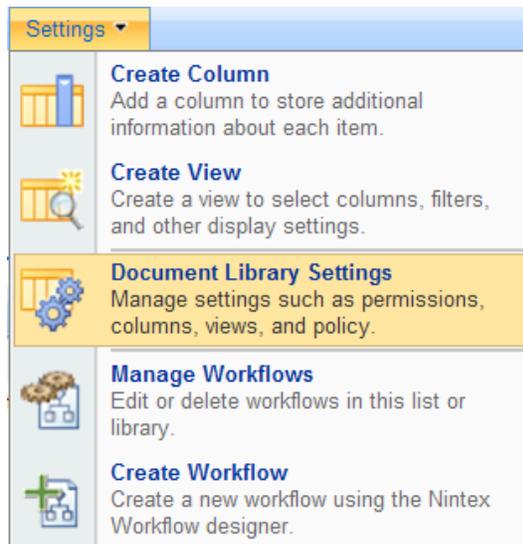
- Click on the library name to be deleted. In the example below, delete the **SharePoint Images and Pictures** library



All Site Content

 Create
Name
Document Libraries
 Documents
 Form Templates
 GPO Terms and Acronyms
 Images
Picture Libraries
 SharePoint Images and Pictures

- Click on SharePoint Images and Pictures
- Click on Document Library Settings



- The Customize page appears. Under the Permissions and Management section, select **Delete this picture library**



Customize SharePoint Images and Pictures

List Information

Name: SharePoint Images and Pictures
Web Address: <http://ww00130d:16787/SharePoint Images and Pictures/Forms/AllItems.aspx>
Description: All graphics relating to SharePoint are stored in this library.

General Settings

- [Title, description and navigation](#)
- [Versioning settings](#)
- [Advanced settings](#)
- [Manage item scheduling](#)
- [Audience targeting settings](#)

Permissions and Management

- [Delete this picture library](#)
- [Save picture library as template](#)
- [Permissions for this picture library](#)
- [Manage checked out files](#)
- [Workflow settings](#)
- [Information management policy settings](#)



- Deleting a library also deletes all files in the library. It is not necessary to have an empty library before deletion.. Make certain that any required files are moved to another library. SharePoint does issue a warning prior to deletion.



- Click OK to delete the selected library.
- A deleted library goes to the Recycle Bin and can be restored with all files (if any) intact. Follow the procedure in **Section 2.5.2 Restore a Deleted Item**.



2.4. File Management

- The following file management topics are covered in the Document Library section above:
 - Upload a single file, Section **2.2.3**
 - Upload multiple files, Section **2.2.4**
 - Checking out a file, Section **2.2.5**
 - Cancel a File Checkout, Section **2.2.6**.
 - Checking in a file, Section, **2.2.7**

2.5. Restoring A Library Item From The Recycle Bin

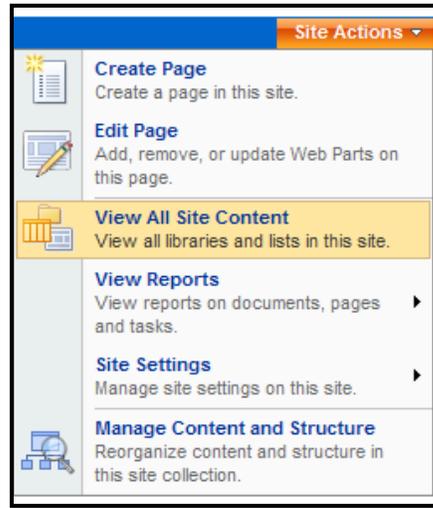
- The SharePoint recycle bin provides two-stage protection against accidental deletions. When an item is deleted from one of the libraries, it is deleted from the site and moved to the site's Recycle Bin where it can be restored. If the item is then deleted from the Recycle Bin, it is moved to the site's collection Recycle Bin. From there, the item may either be deleted (permanently) or restored to its original location.
- By default, the site's Recycle Bin holds the item for 30 days. The SharePoint administrator can modify this setting.

2.5.1. Delete an Item (Goes into Recycle Bin)

- Open the library where the file to be deleted resides. Either select the library from the **Quick Launch** area or **View All Site Documentation**.
- Under Site Actions, select View All Site Content

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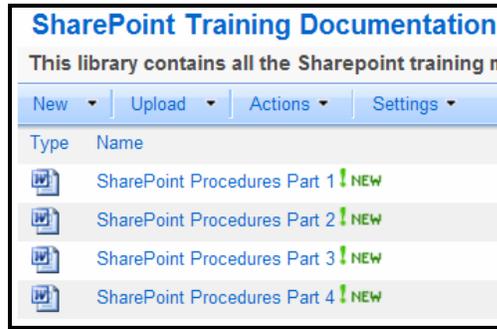
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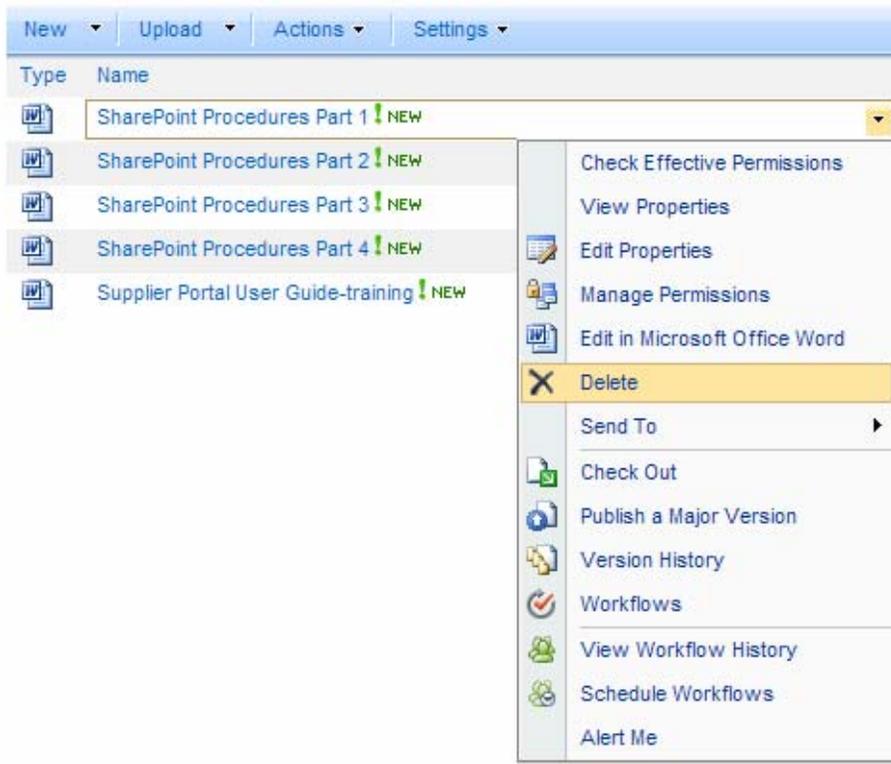
- If the user only has Read or Contribute permission, check to see if the required library is available from the Quick Launch area or from one of the menu bar items.
- If View All Site Documents is selected, the All Site content screen is displayed. Locate the library (in this example, “SharePoint Training Documentation.”)

Name	Description	Items	Last Modified
Document Libraries			
Documents	This system library was created by the Publishing feature to store documents that are used on pages in this site.	0	4 months ago
Form Templates	This library contains administrator-approved form templates that were activated to this site collection.	1	5 weeks ago
<u>SharePoint Training Documentation</u>	This library consists of all available GPO SharePoint training materials.	5	24 hours ago
News Letters	images that are used on pages in this site.	0	4 months ago
Pages	This system library was created by the Publishing feature to store pages that are created in this site.	7	2 days ago

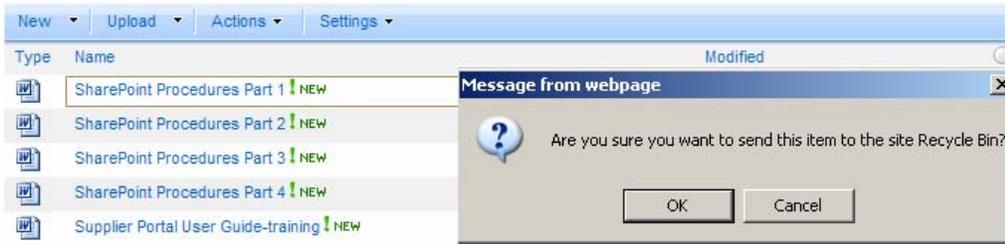
- The library containing the files is displayed.



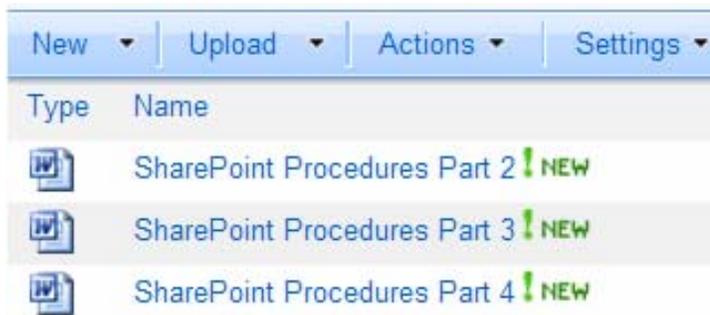
- Place the cursor over the file to be deleted and click on the down arrow.



- Click **Delete** and at the warning message, click OK. The file is then removed from the current library and moved into the Recycle Bin.



- The file (**Sharepoint Procedures Part 1**) has been removed from the library.



2.5.2. Restore Deleted Item

- Select Recycle Bin from the Quick launch area.



Surveys

[Please tell us about
Sharepoint](#)

Repositories

[Tools and Templates](#)
[Training](#)
[Risk Assessment](#)
[News Letters](#)
[SharePoint Training
Documentation](#)
[GPO Terms and
Acronyms](#)

Lists

[Events Calendar](#)

Quick Links

[Ask a Question](#)
[FAQs](#)

Sites

Pub

[Abbott Again Recognized
for Outstanding
Citizenship in China](#)

GPO SAP Team

 [Recycle Bin](#)

- The **Recycle Bin** contains the deleted file(s) and show the file(s)' original location.
- Select the file(s) to be restored by clicking on the box preceding each file.
- Click on **Restore Selection**.



Recycle Bin

Use this page to restore items that you have deleted from this site or to empty

[Restore Selection](#) | [Delete Selection](#)

<input type="checkbox"/>	Type	Name	Original Location
<input checked="" type="checkbox"/>		SharePoint Procedures Part 1.doc	/SharePoint Training Documentation

- The **Recycle Bin** is now empty.

Recycle Bin

Use this page to restore items that you have deleted from this site. Items deleted from this site ago will be automatically emptied.

[Restore Selection](#) | [Delete Selection](#)

<input type="checkbox"/>	Type	Name	Original Location
--------------------------	------	------	-------------------

There are no items in the recycle bin.

- And the previously deleted file has been restored to its original library.

New | Upload | Actions | Settings

Type	Name
	SharePoint Procedures Part 1 !NEW
	SharePoint Procedures Part 2 !NEW
	SharePoint Procedures Part 3 !NEW
	SharePoint Procedures Part 4 !NEW



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2.5.3. Delete an Item from the Recycle Bin (Permanent Deletion)

- Select Recycle Bin from the Quick launch area.

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Surveys

Please tell us about
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 [Recycle Bin](#)

- The **Recycle Bin** contains the deleted file(s)
- Select the file(s) to be permanently removed by clicking on the box preceding each file.
- Click on **Delete Selection**.

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Recycle Bin

Use this page to restore items that you have deleted from this site or to empty

[Restore Selection](#) | [Delete Selection](#)

<input type="checkbox"/>	Type	Name	Original Location
<input checked="" type="checkbox"/>		SharePoint Procedures Part 1.doc	/SharePoint Training Documentation

- The **Recycle Bin** is now empty.

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Recycle Bin

Use this page to restore items that you have deleted from this site. Items deleted from this site will be automatically emptied.

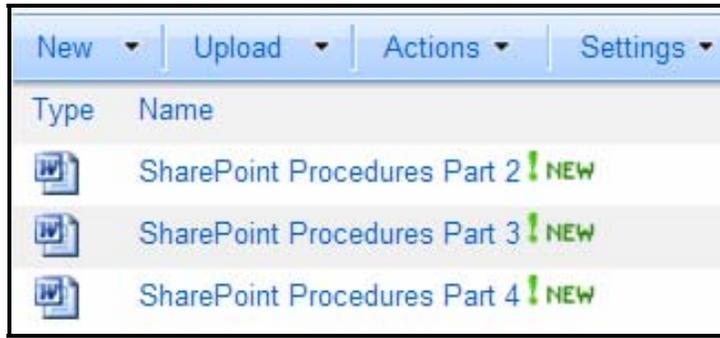
[Restore Selection](#) | [Delete Selection](#)

<input type="checkbox"/>	Type	Name	Original Location
--------------------------	------	------	-------------------

There are no items in the recycle bin.

- The permanently deleted file has been removed from the SharePoint library and cannot be retrieved.

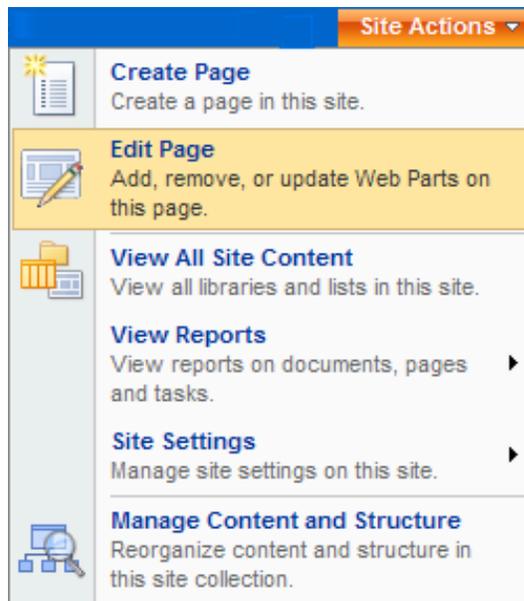
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2.6. Web Parts

2.6.1. Add Web Part to a page

- Navigate to the desired site, click **Edit Page** in the **Site Actions** drop down.

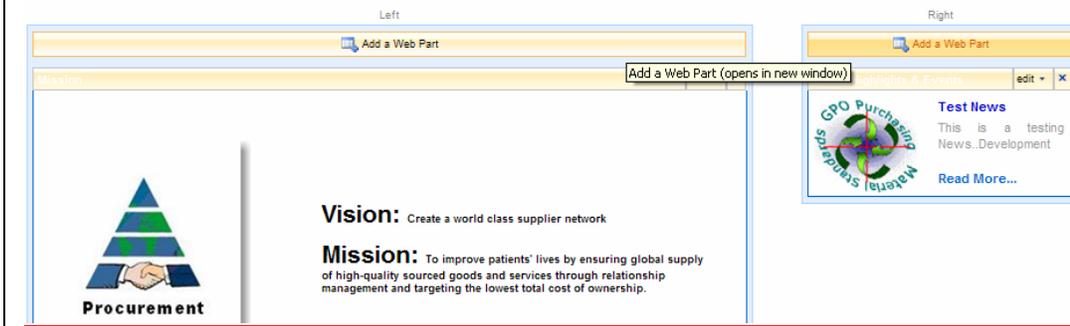


- [This opens the SharePoint edit mode](#)

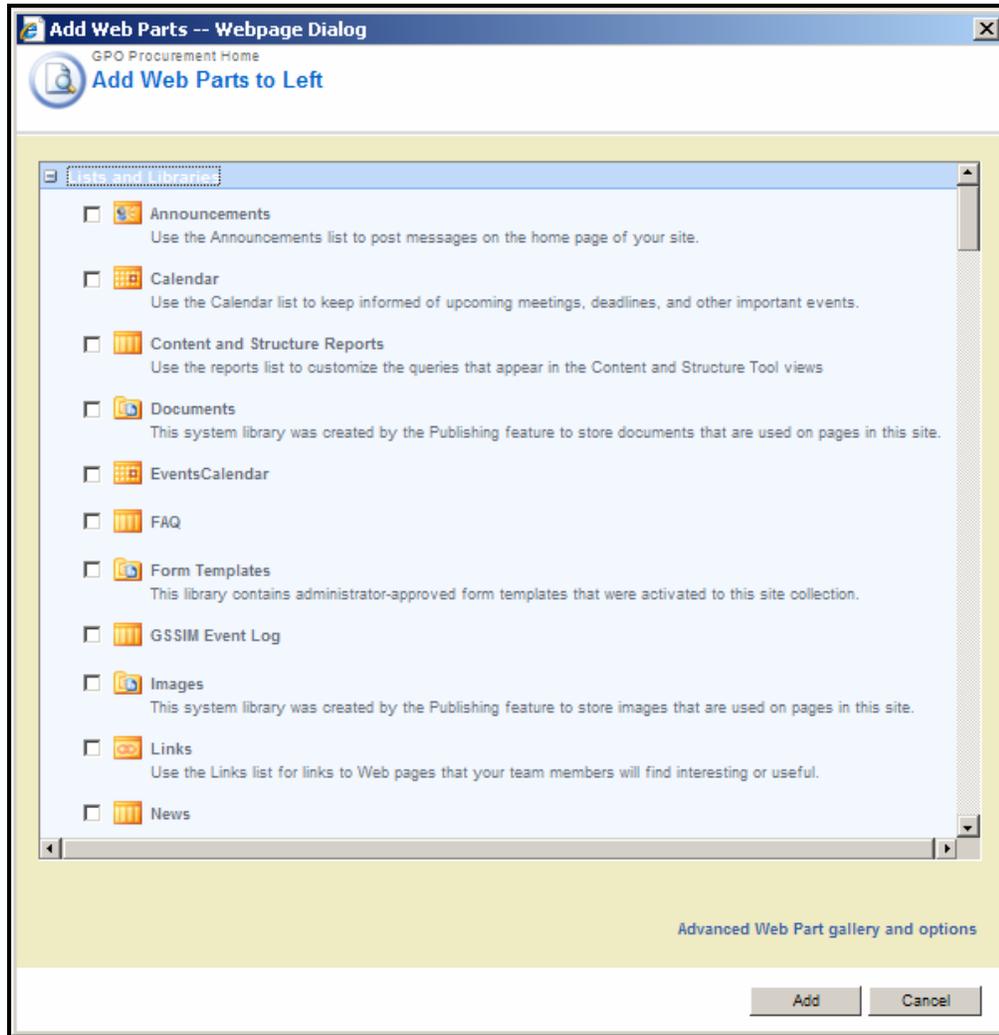
Formatted: Bullets and Numbering



- Point to **Add Web Parts**. A new page opens in design mode and the **Add Web Parts – Webpage Dialog** appears.



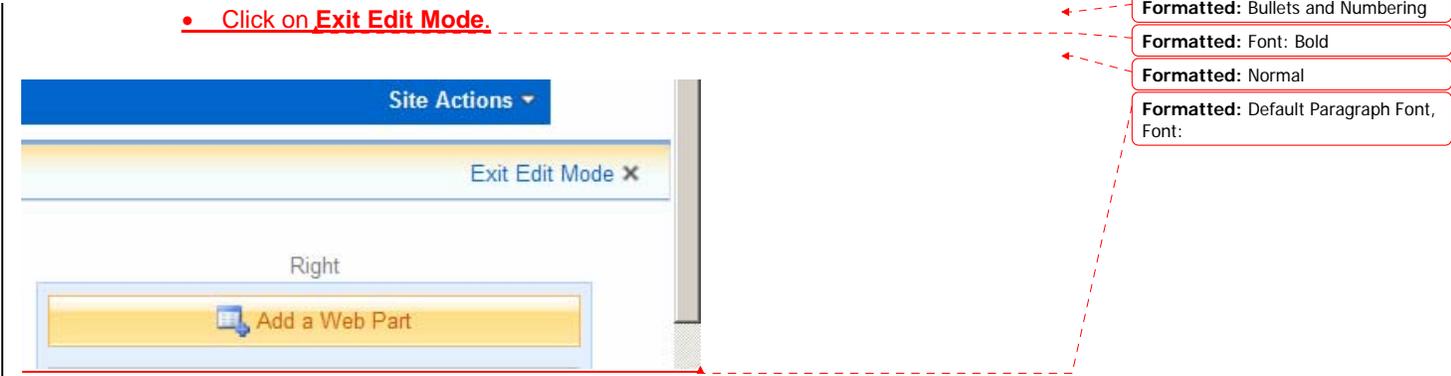
- Notice that this example illustrates that the added web part is to be inserted in the “Left” zone. If the web part was intended to be placed in the right zone, then the link “Add a Web Part” under the “Right” zone heading would have been selected.



- The **Add Web Parts –Webpage Dialogue** box contains all of the available web parts. They are divided into categories:
 - Lists and Libraries
 - Business Data
 - Content Rollup
 - Dashboard
 - Filters
 - Miscellaneous

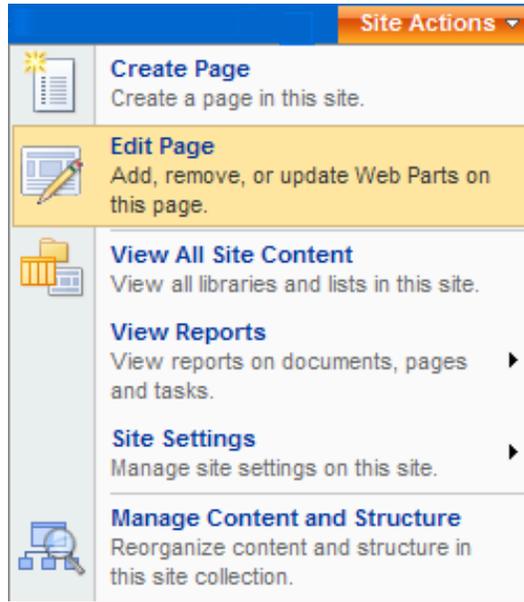


- Outlook Web Access
- Search
- Site Directory
- From the available Web Parts, select the required web part, and click **Add**.
- Click on **Exit Edit Mode**.

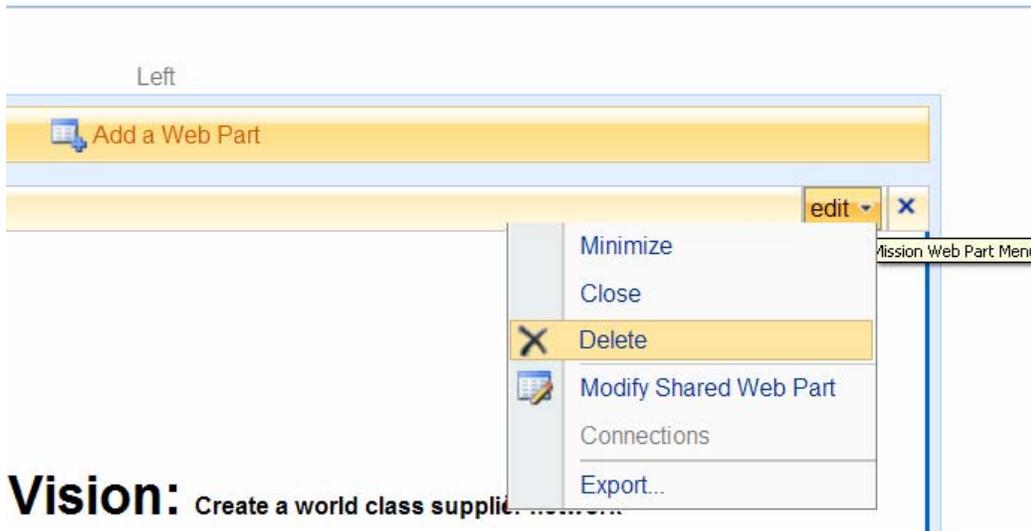


2.6.2. Remove Web Part from a page

- On the page that you want to edit, click **Edit Page** in the **Site Actions** drop down menu.



- In the shared view, click the **edit** arrow for the Web Part to be deleted, and select **Delete**.



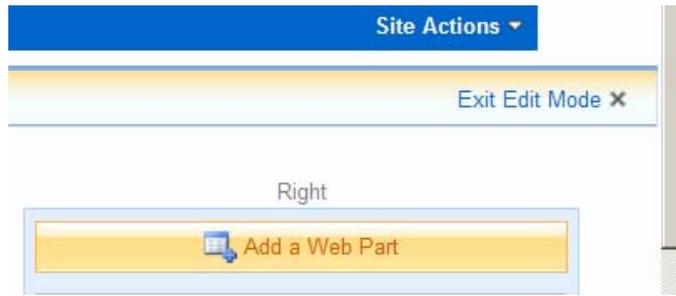
Vision: Create a world class supplier network



- Do not click on the “x” (next to the edit arrow). This simply closes the web part. Unlike other Windows’ applications, it does **NOT** delete the item.
- A closed web part can be reopened. The following section describes the process to recover, or re-open, a closed web part.
- Click on **Exit Edit Mode**

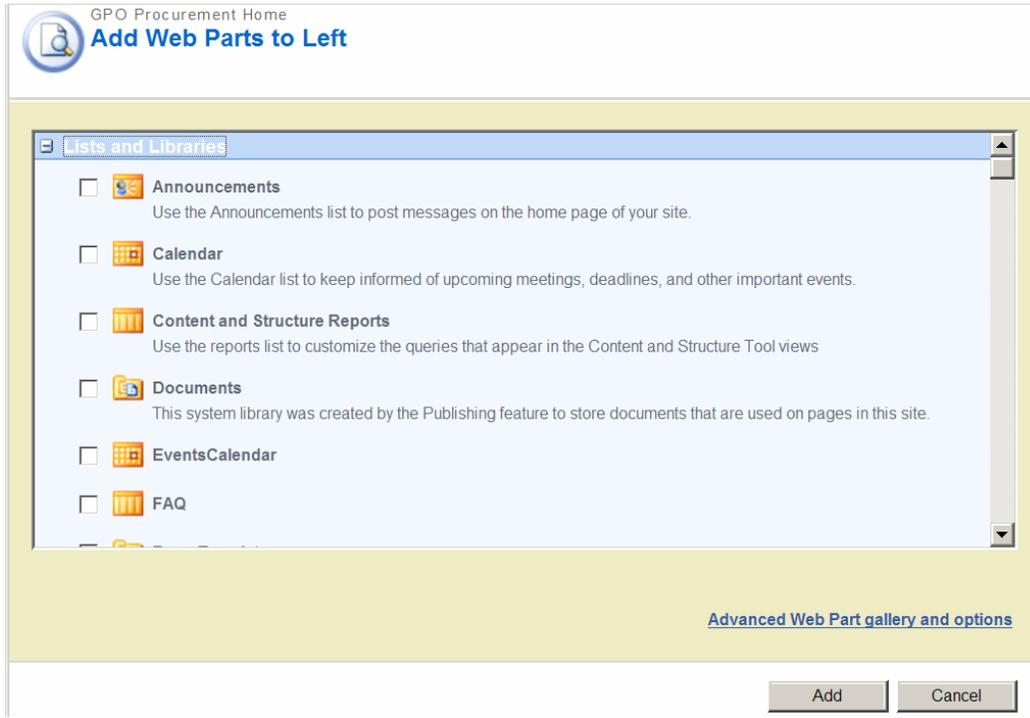
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Deleted: ing
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2.6.3. Re-open a Closed Web Part

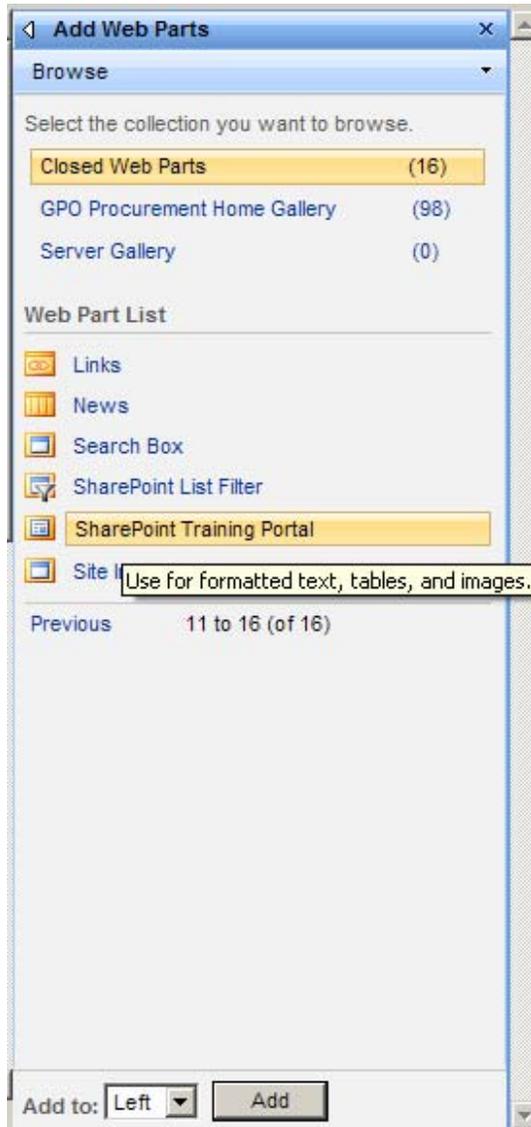
- A web part that has been closed can just as easily be reopened.
 - Go to **Site Actions** and click on **Edit Page**
 - Click on **Add a Web Part**. This opens the **Add Web Parts – Webpage Dialog** box.
 - At the lower right side of this dialog box, click on the **Advanced Web Part gallery and options** link as shown below.



- The Add Web Parts dialog box opens. Note that it shows the number of closed web parts. The **Web Part List** identifies the closed web parts and it shows how many web parts have been closed.
- Locate the closed web part by name. If no name was given when the web part was created, it will simply be listed by the general web part name, such as **Content Editor Web Part.**

Deleted: In this example there are 14 closed web parts.

Deleted: os



- In this example, the **SharePoint Training Portal** was closed. Simply drag the item to the appropriate location on the SharePoint site. The web part appears in the location where it was dropped. The web part can be relocated

Deleted: Fortunately, there is only one Content Editor Web Part on the list.



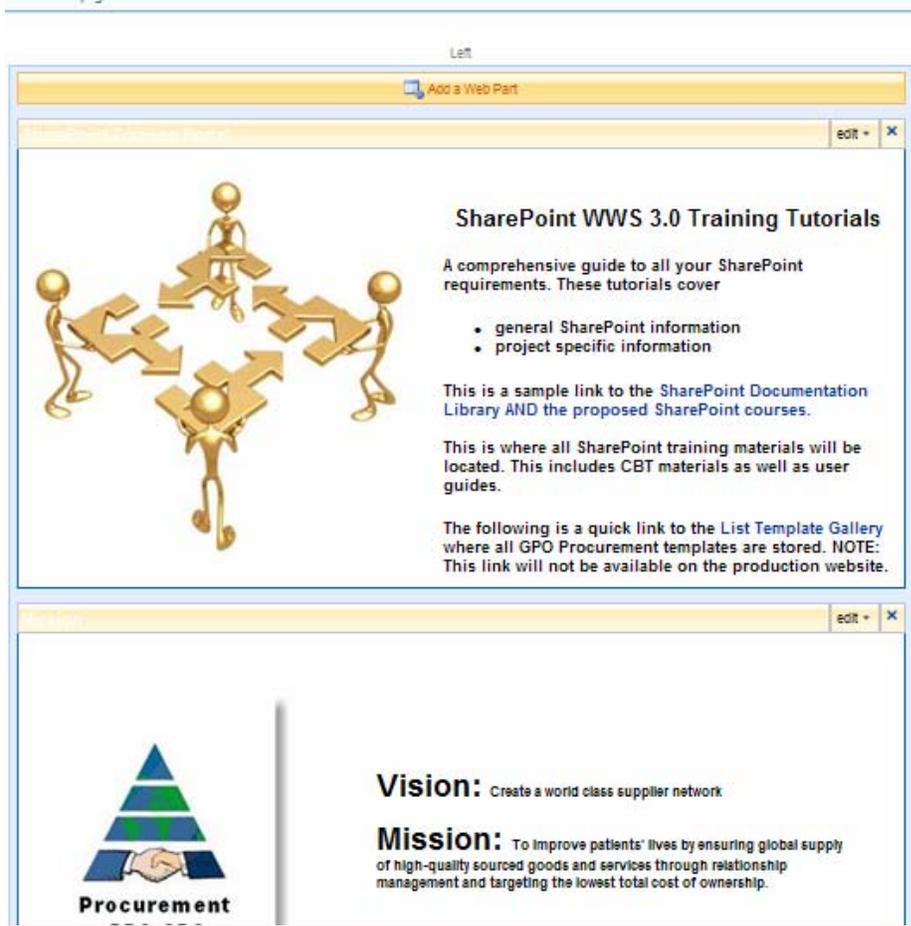
by using the “Edit Web Part” to select the proper zone (Left, Right, or one of the numbered vertical zones).

Deleted: and

Deleted: ion

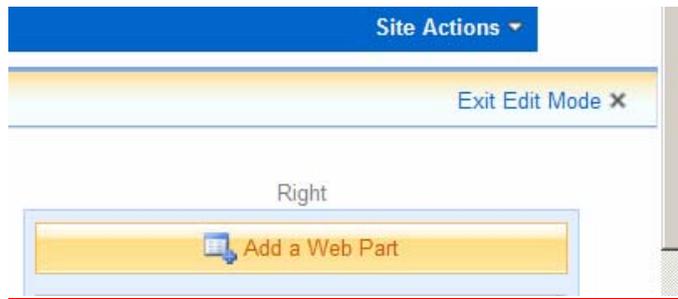
Deleted: <#>If more than one Content Editor Web Part is listed, drag and drop each one until the correct web part is shown.¶

The screenshot shows the 'GPO Procurement Home' page. The main content area features a logo with a triangle and two hands shaking, with the text 'Procurement PPO GPO'. To the right of the logo, there is a 'Vision' statement: 'Create a world class supplier ne' and a 'Mission' statement: 'To improve patients' lives by of high-quality sourced goods and services thro management and targeting the lowest total cost'. The 'Add Web Parts' dialog box is open on the right side of the page. It has a 'Browse' dropdown menu and a list of collections: 'Closed Web Parts (16)', 'GPO Procurement Home Gallery (98)', and 'Server Gallery (0)'. Below this is a 'Web Part List' containing: 'Links', 'News', 'Search Box', 'SharePoint List Filter', 'SharePoint Training Portal', and 'Site Image'. At the bottom of the dialog, there is an 'Add to:' dropdown menu set to 'Left' and an 'Add' button.



- The **SharePoint WWS 3.0 Training Tutorials** has now been restored. Either use the **Move** tool to relocate the web part to another zone on the Left side, or use the Web Part editing menu to specify the correct zone.
- [Click on Exit Edit Mode.](#)

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- ← Formatted: Normal



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Note 1: Web parts can be restricted from Hide or Close by making the appropriate selection in the Content Editor. All options in the Content Editor are described in Section 2.6.4 (Edit/Modify a Shared Web Part).

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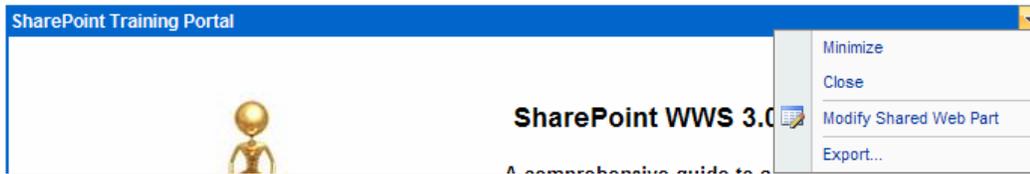
Note 2: A Web Part should not be closed unless it is justified. **Closed** means that the Web Part is just hidden, **NOT** deleted. Closing Web Parts takes up significant memory and can cause poor site performance. A closed web part functions as a working web part, that is, it can receive data, its links are functional, etc.

2.6.4. Edit/Modify a Shared Web Part

Note: In order to create an HTML shared web part, do NOT use the Rich Text Editor. Skip to Section 2.6.5 (Using HTML/xHTML to Modify a Web Part).

- On the page that you want to edit, click on the arrow and a drop-down menu appears. For this example, click on the arrow on the **SharePoint WWS 3.0 Training Tutorials** web part.

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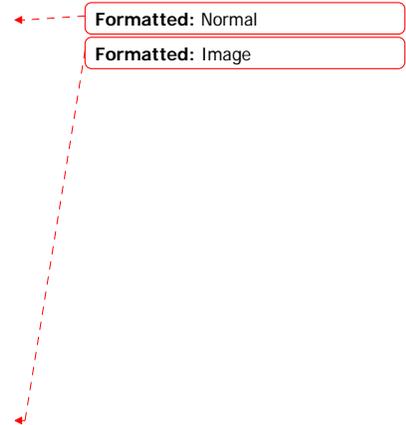
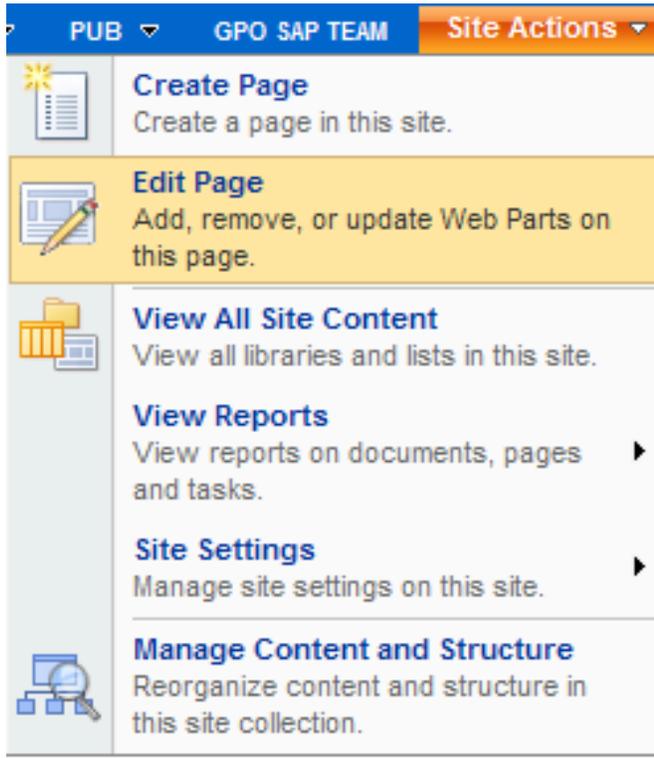
- Select **Modify Shared Web Part**.
- The page opens in design mode with the selected Web Part outlined with a dotted yellow line. The properties for the Web Part are displayed in a pane that opens on the right side of the page.

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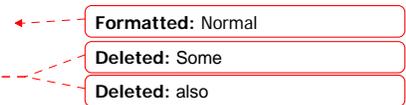
- OR, select Edit Page from the Site Actions menu item.**

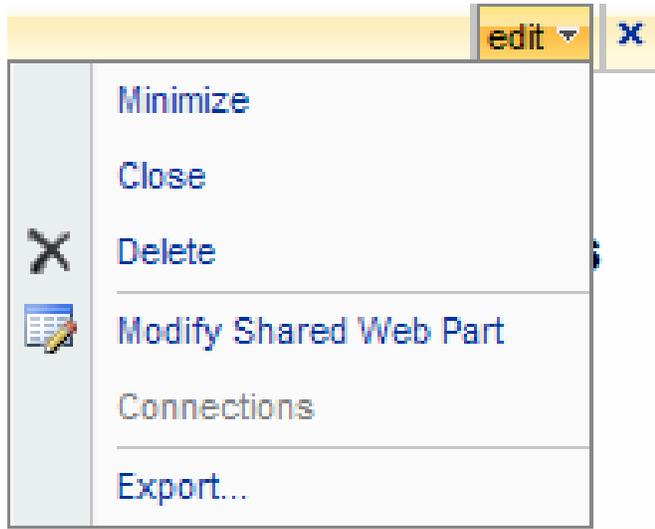
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- Using the Edit page option, Web parts can include connections and export options.

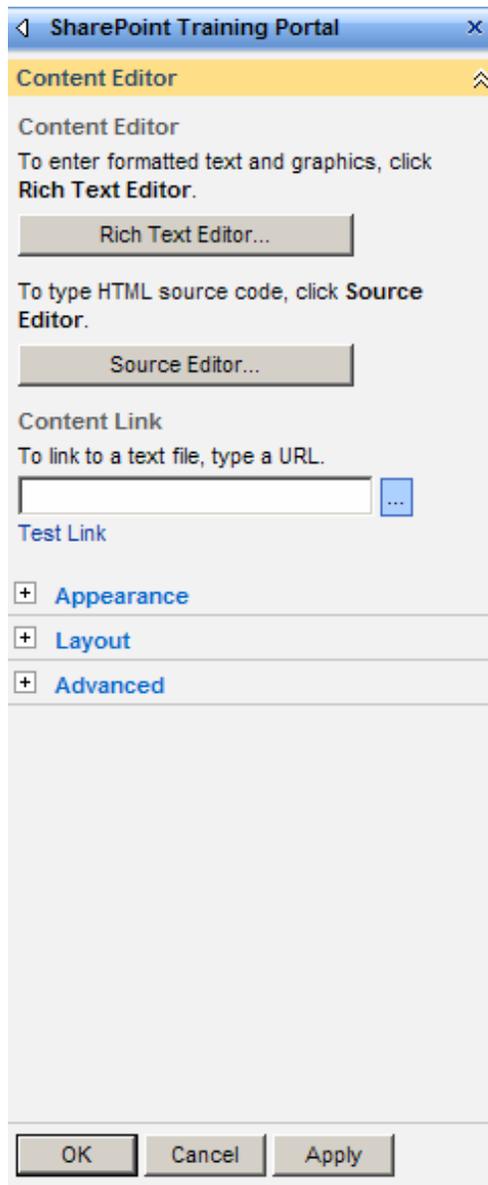




- The **Export** option allows a Web Part to be exported from one site to another site within a site collection. When a Web Part is exported/imported that has already been configured, all existing settings are intact.
- The **Connections** option connects two or more web parts so changes in one are reflected in the connected web parts.
- Select **Modify Shared Web part**

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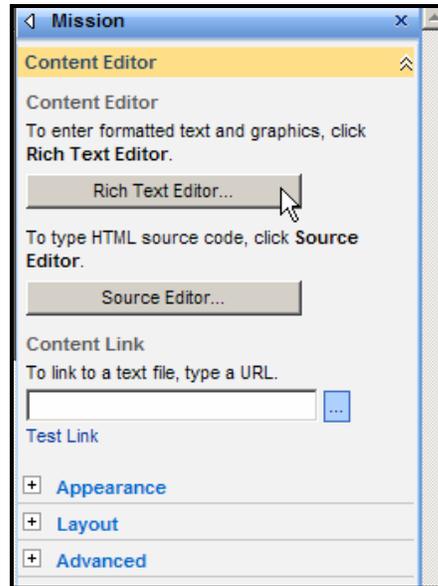
- Edit the properties to be changed. Properties specific to a Web Part appear at the top section of the editor dialogue box.

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- Properties common to all web parts are shown below. These are described in detail in Section 2.6.6 (Description of Edit Options).
 - Appearance
 - Layout
 - Advanced
- A **content editor web part** contains a **Rich Text Editor** to modify the content.

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- Click on the **Rich Text Editor** to edit the **content editor web part**
- A new window opens that contains the **HTML Editor – Web Page Dialogue**.

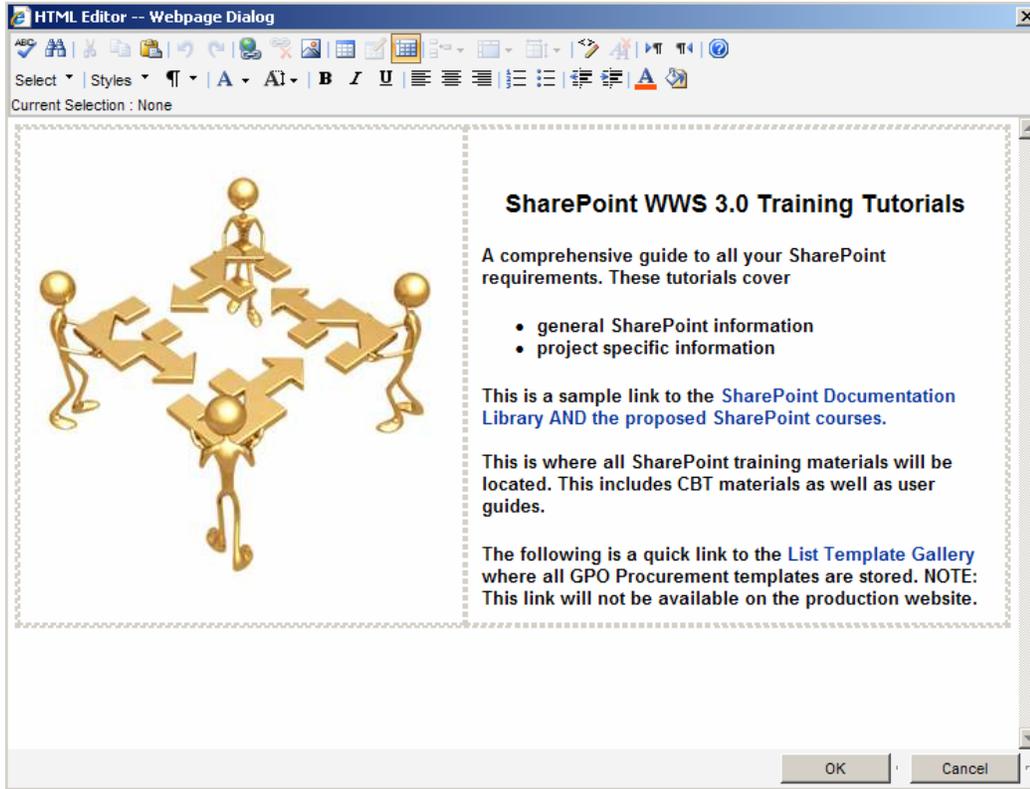
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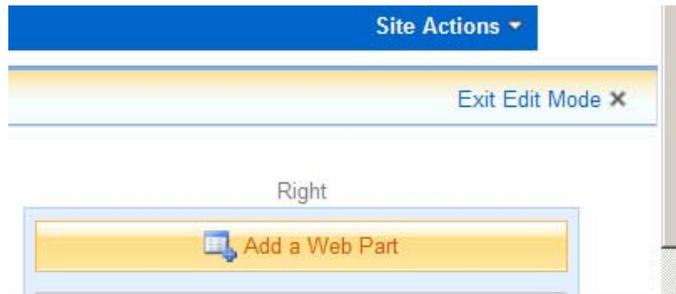
- Make the appropriate changes using the HTML editor. This method is slightly different from making a web part using HTML. Clicking on the **Source Editor** opens a window showing the Microsoft HTML source code which contains a significant amount of extraneous HTML code.

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```
px solid; BORDER-LEFT: 0px solid; BORDER-TOP: 0px solid; BORDER-RIGHT: 0px solid"
border=0 src="http://www00130d:16787/PublishingImages/image61079_61795.png"></P>
<P style="MARGIN-RIGHT: 0px" dir=ltr
align=right></P></TH></TR></TBODY></TABLE></DIV>
<TABLE style="WIDTH: 100%" border=0 cellSpacing=0 summary="" cellPadding=0>
<TBODY>
<TR>
<TH style="TEXT-ALIGN: left" width="100%">
<P><SPAN style="FONT-SIZE: large">Vision:</SPAN> &nbsp;</SPAN> Create a world class supplier
network<BR><BR><SPAN style="FONT-SIZE: large">Mission:</SPAN> To improve patients'
lives by ensuring global supply<BR>of high-quality sourced goods and services through
relationship<BR>management and targeting the lowest total cost of ownership.
</P></TH></TR></TBODY></TABLE></TH></TR></TBODY></TABLE>
<P style="TEXT-ALIGN: left; MARGIN: 0px; mso-kinsoku-overflow: 1; mso-char-wrap: 1; mso-
line-spacing: 100 0 50" class=O v:shape="_x0000_s3074">&nbsp;</P>
<DIV></DIV>
<DIV style="TEXT-ALIGN: right">&nbsp;</DIV><BR>
<DIV style="TEXT-ALIGN: right">&nbsp;&nbsp;</DIV>
```

- Click **Apply** to make changes without closing the pane.
- Click **OK** to exit.
- Click Exit Edit Mode



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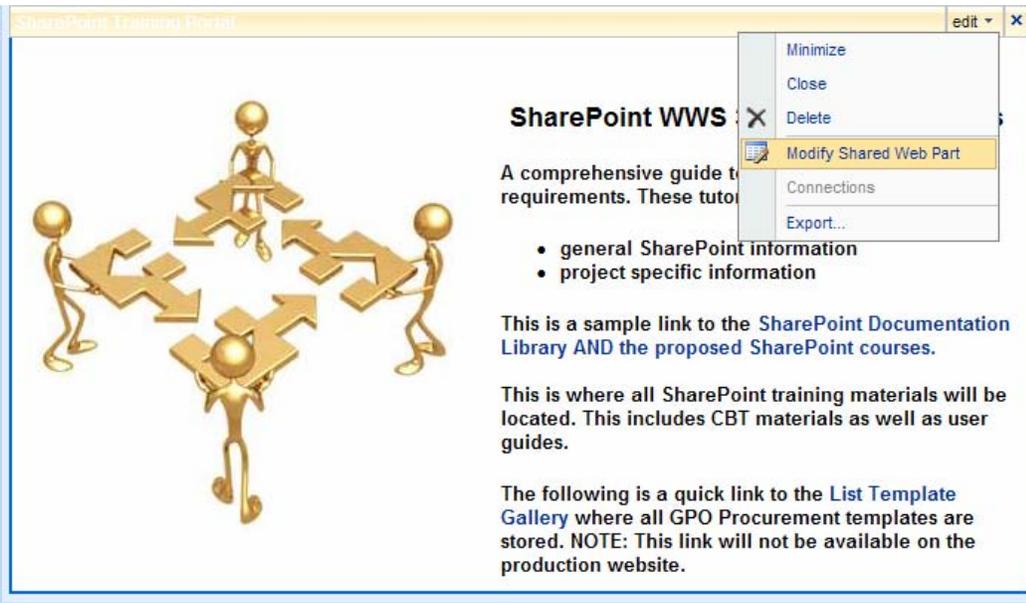
Note: The images used in a web part must be available in the picture (image) library.



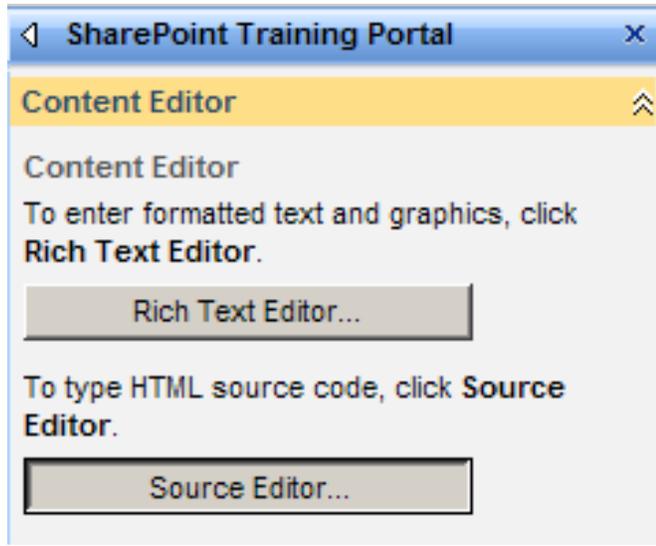
2.6.5. Using HTML/xHTML to Modify a Web Part

- Click the arrow on the web part to open the menu and select **Modify Shared Web Part**
- Or select **Edit Page** from the **Site Actions** menu and select **Edit**, then **Modified Shared Web part** .

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- Formatted: Bullets and Numbering
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- In the content editor, click on **Source Editor**.



- If this is only to insert and/or delete HTML code, make the changes directly in the code.
- If this is to create a new web part, enter all the HTML code.
- Normal HTML structure is:

```
<HTML>
  <HEAD>
    <TITLE>The document title</TITLE>
  </HEAD>
  <BODY>

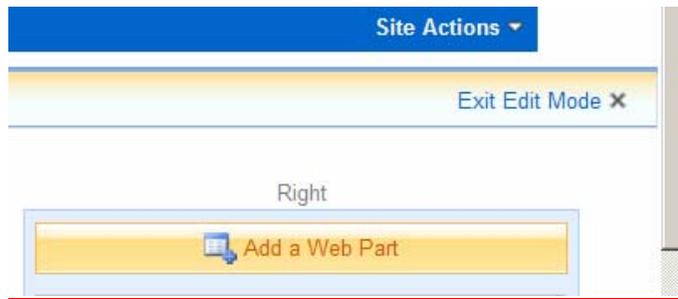
  </BODY>
</HTML>
```

- The **Source Editor** only requires the code that is located between the BODY tags.

- A **Text Entry** box opens in a separate window ready for the HTML code.

- Deleted: simply a modification
- Deleted: ,
- Deleted: /
- Deleted: the appropriate
- Deleted: appropriate

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2.6.6. Description of edit options

- Although there are several different edit panes (depending on the web part type), three characteristics are common to all web parts. They are:
 - **Appearance**
 - **Layout**
 - **Advanced**

Appearance



Appearance

Title

Height

Should the Web Part have a fixed height?

Yes

No. Adjust height to fit zone.

Width

Should the Web Part have a fixed width?

Yes

No. Adjust width to fit zone.

Chrome State

Minimized

Normal

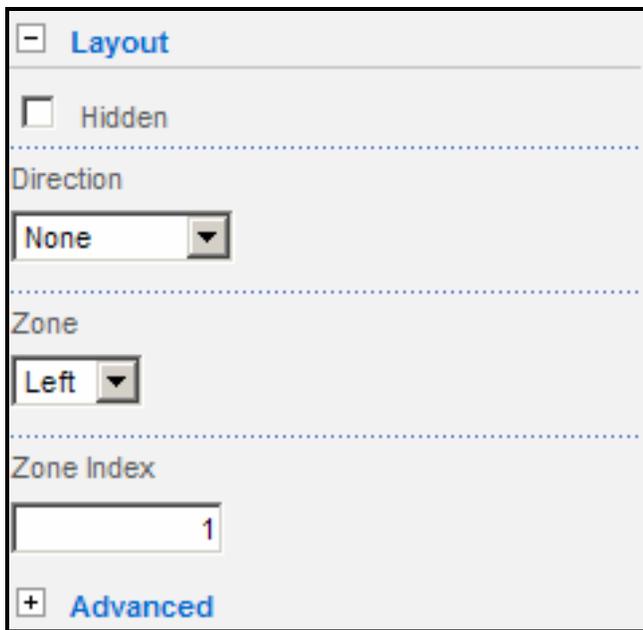
Chrome Type

Title	Specifies the title of the Web Part that appears in the Web Part title bar.
-------	---



Height	Specifies the height of the Web Part.
Width	Specifies the width of the Web Part.
Chrome State	Specifies whether the entire Web Part appears on the page when a user opens the Web Part Page. By default, the chrome state is set to Normal and the entire Web Part appears. Only the title bar appears when the state is set to Minimized .
Chrome Type	Specifies whether the title bar and border of the Web Part frame are displayed.

Layout



Hidden	Specifies whether the Web Part is visible when a user opens the Web Part Page. If the check box is selected, the Web Part is visible only when designing the page and has the suffix (Hidden) appended to the title. Hide a Web Part if it is to be used to provide data to another Web Part through a Web Part connection without displaying the Web Part.
--------	---



Direction	Specifies the direction of the text in the Web Part content. For example, Arabic is a right-to-left language; English and most other European languages are left-to-right languages. This setting may not be available for all types of Web Parts.
Zone	Specifies the zone on the Web Part Page where the Web Part is located. Zones on the Web Part Page are not listed in the list box when there is no permission to modify the zone.
Zone Index	Specifies the position of the Web Part in a zone when the zone contains more than one Web Part. To specify the order, type a positive integer in the text box. If the Web Parts in the zone are ordered from top to bottom, a value of 1 means that the Web Part appears at the top of the zone. If the Web Parts in the zone are ordered from left to right, a value of 1 means that the Web Part appears on the left of the zone. For example, to add a Web Part to an empty zone that is ordered from top to bottom, the Zone Index is 0 . When adding a second Web Part to the bottom of the zone, its Zone Index is 1 . To move the second Web Part to the top of the zone, type 0 , and then type 1 for the first Web Part. Each Web Part in the zone must have a unique Zone Index value. Changing the Zone Index value for the current Web Part changes the Zone Index value for other Web Parts in the zone.

Advanced



SharePoint Training Portal

Advanced

Allow Minimize

Allow Close

Allow Hide

Allow Zone Change

Allow Connections

Allow Editing in Personal View

Export Mode

Export all data

Title URL

Description

Use for formatted text, tables, and im

Help URL

Help Mode

Modeless

Catalog Icon Image URL

/_layouts/images/mscontl.gif

Title Icon Image URL

Import Error Message

Cannot import this Web Part.

Target Audiences

OK Cancel Apply



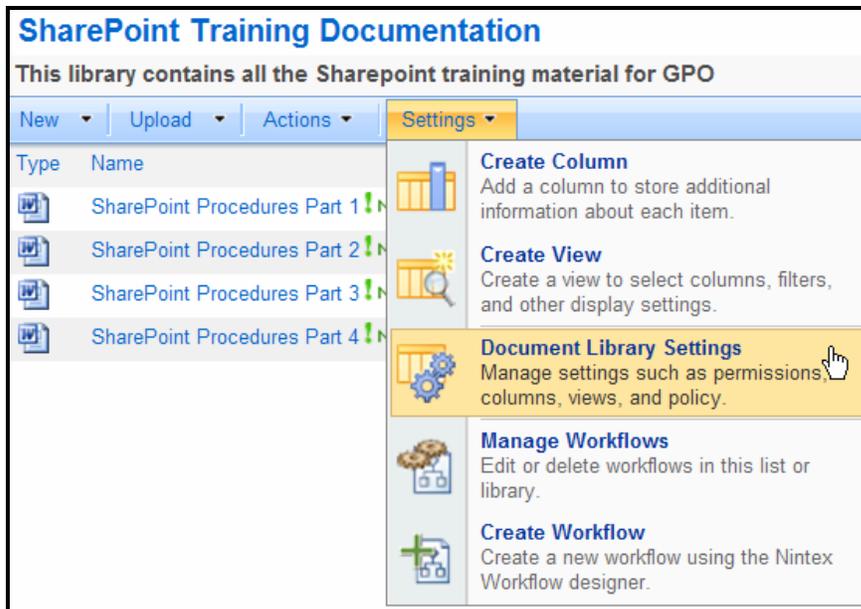
Allow Minimize	Specifies whether the Web Part can be minimized.
Allow Close	Specifies whether the Web Part can be removed from the Web Part Page.
Allow Hide	Specifies whether the Web Part can be hidden.
Allow Zone Change	Specifies whether the Web Part can be moved to a different zone.
Allow Connections	Specifies whether the Web Part can participate in connections with other Web Parts.
Allow Editing in Personal View	Specifies whether the Web Part properties can be modified in a personal view.
Export Mode	Specifies the level of data that is permitted to be exported for this Web Part. Depending on the configuration, this setting may not be available.
Title URL	Specifies the URL of a file containing additional information about the Web Part. The file is displayed in a separate browser window when clicking the Web Part title.
Description	Specifies the ScreenTip that appears when the mouse pointer rests on the Web Part title or Web Part icon. The value of this property is used when searching for Web Parts by using the Search command on the Find Web Parts menu of the tool pane in the following Web Part galleries: Site, Virtual Server, and Web Part Page.
Help URL	Specifies the location of a file containing Help information about the Web Part. The Help information is displayed in a separate browser window when you click the Help command on the Web Part menu.
Help Mode	Specifies how a browser will display Help content for a Web Part. Select one of the following: Modal Opens a separate browser window, if the browser has this capability. A user must close the window before returning to the Web page. Modeless Opens a separate browser window, if the browser has this capability. A user does not have to close the window before returning to the Web page. This is the default value. Navigate Opens the Web page in the current browser window.



Catalog Icon Image URL	Specifies the location of a file containing an image to be used as the Web Part icon in the Web Part List. The image size must be 16 by 16 pixels.
Title Icon Image URL	Specifies the location of a file containing an image to be used in the Web Part title bar. The image size must be 16 by 16 pixels.

2.7. Customize a Library

- Navigate to the library that is going to be modified
- Select Settings
- Note: Any modifications can be made from this selection, such as
 - Create Column
 - Create View
 - Document Library Settings
 - Manage Workflow
 - Create Workflow
- Select **Document Library Settings**. All modifications may be performed in this location.





- Select the modification criteria from General Settings, Permissions and Management, Communications, Columns, and/or Views.
- The customize list page contains the following information:
 - List Information

List Information	
Name:	SharePoint Training Documentation
Web Address:	http://ww00130d:16787/SharePoint Training Documentation/Forms/AllItems.aspx
Description:	This library contains all the Sharepoint training material for GPO

- General Settings

General Settings
<ul style="list-style-type: none">▪ Title, description and navigation▪ Versioning settings▪ Advanced settings▪ Manage item scheduling▪ Audience targeting settings

- Permissions and Management

Permissions and Management
<ul style="list-style-type: none">▪ Delete this document library▪ Save document library as template▪ Permissions for this document library▪ Manage checked out files▪ Workflow settings▪ Information management policy settings



- Communications

Communications

- [RSS settings](#)

- Columns

Columns

A column stores information about each document in the document library. The following table lists the columns that are available in the document library.

Column (click to edit)	Type	Required
Title	Single line of text	
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

- [Create column](#)
- [Add from existing site columns](#)
- [Column ordering](#)
- [Indexed columns](#)

- Views

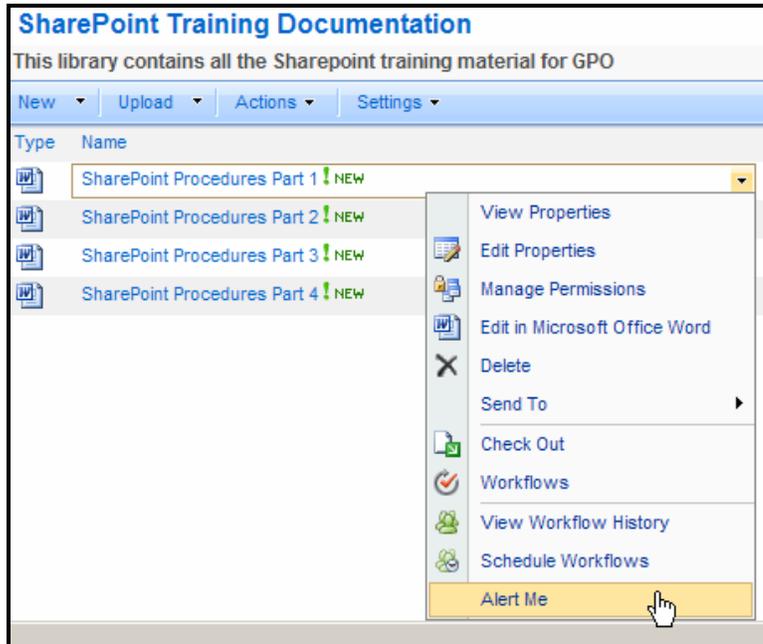


Views	
A view of a document library allows you to see a particular selection of items or to see the items configured for this document library:	
View (click to edit)	Default View
All Documents	✓
Explorer View	
▣ Create view	

2.8. Email Alerts

2.8.1. Alerts for Specific Files Within a Library

- Navigate to the specific library and the desired file.
- Move the cursor over the file and click on the down arrow
- Click Alert Me



Refer to the New Alert illustration below:

- Enter an alert title. This will default to Library Name : File Name such as SharePoint Training Documentation: SharePoint Procedures Part 1.doc in the example below.
- Enter the email address where the alert is to be sent. The default email address is the current user's. However, click on the book icon to open the global email directory. Select all required emails. Alerts will be sent to all specified email addresses until the email list is changed.
- Select which changes are desired to trigger the alert email. For individual files, the four choices are Anything changes, Someone else changes a document, Someone else changes a document created by me, Someone else changes a document last modified by me.
- Select when the alert email must be sent: immediately, daily, weekly. If daily, enter the desired time. If weekly, enter both the desired day of the week and the time..
- Click **OK**



New Alert

Use this page to create an e-mail alert notifying you when there are changes to the specified item, document, list, or library.

[View my existing alerts on this site.](#)

OK Cancel

Alert Title Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.	<input type="text" value="SharePoint Training Documentation: Shar"/>
Send Alerts To You can enter user names or e-mail addresses. Separate them with semicolons.	Users: <input type="text" value="NORTHAMERICA\HAUENLR"/>
Send Alerts for These Changes Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.	Send me an alert when: <input checked="" type="radio"/> Anything changes <input type="radio"/> Someone else changes a document <input type="radio"/> Someone else changes a document created by me <input type="radio"/> Someone else changes a document last modified by me
When to Send Alerts Specify how frequently you want to be alerted.	<input checked="" type="radio"/> Send e-mail immediately <input type="radio"/> Send a daily summary <input type="radio"/> Send a weekly summary Time: <input type="text" value="Wednesday"/> <input type="text" value="4:00 PM"/>

OK Cancel

- Click on the link **View my existing alerts on this site** in order to see which alerts have been previously set. The example below indicates two alerts have been set for this site.
- Alerts may also be added or deleted from this screen.



My Alerts on this Site

Use this page to manage the list of libraries, files, lists, and items for which you receive alerts. Note that some alerts, such as system generated task alerts, do not appear on this page. Click the name of an alert to edit its settings.

Add Alert | Delete Selected Alerts

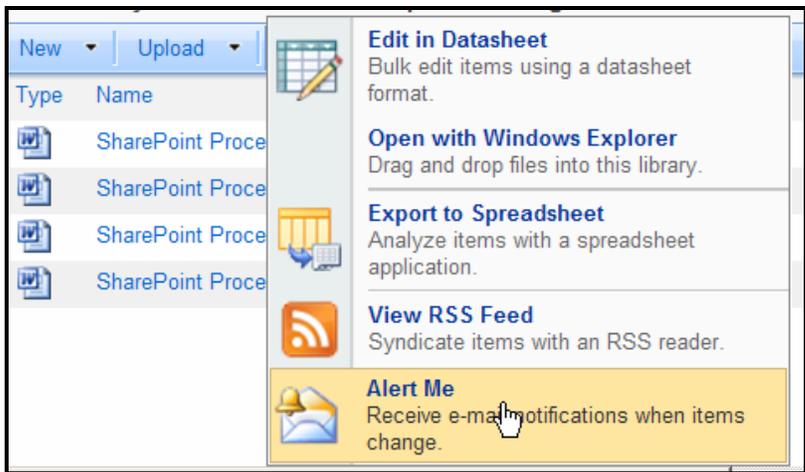
Alert Title

Frequency: Immediate

- SharePoint Training Documentation
- Training

2.8.2. Alerts for Any Files Within a Library

- Go to the required library
- Click on **Actions**
- Click Alert Me



Refer to the **New Alert** illustration below:



- Enter an alert title. This will default to Library Name : File Name such as SharePoint Training Documentation: SharePoint Procedures Part 1.doc in the example below.
- Enter the email address where the alert is to be sent. The default email address is the current user's. However, click on the book icon to open the global email directory. Select all required emails.
- Select which changes are desired to trigger the alert email. The five change types are
 - **All changes**
 - **New items are added**
 - **Existing items are modified**
 - **Items are deleted**
 - **Web discussion updates**
- Select which changes are desired to trigger the alert email. For individual files, the four choices are
 - **Anything changes**
 - **Someone else changes a document**
 - **Someone else changes a document created by me**
 - **Someone else changes a document last modified by me**
- Select when the alert email must be sent:
 - **immediately**
 - **daily**: enter the desired time
 - **weekly**: enter both the desired day of the week and the time..
- Click **OK**
- Click on the link **View my existing alerts on this site** in order to see which alerts have been previously set. Using the same example from above, two alerts have been set for this site.
- Alerts may also be added or deleted from this location.



New Alert

Use this page to create an e-mail alert notifying you when there are changes to the specified item, document, list, or library.

[View my existing alerts on this site.](#)

OK Cancel

Alert Title Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.	<input type="text" value="SharePoint Training Documentation"/>
Send Alerts To You can enter user names or e-mail addresses. Separate them with semicolons.	Users: <input type="text" value="NORTHAMERICA\HAUENLR"/>
Change Type Specify the type of changes that you want to be alerted to.	Only send me alerts when: <input checked="" type="radio"/> All changes <input type="radio"/> New items are added <input type="radio"/> Existing items are modified <input type="radio"/> Items are deleted <input type="radio"/> Web discussion updates
Send Alerts for These Changes Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.	Send me an alert when: <input checked="" type="radio"/> Anything changes <input type="radio"/> Someone else changes a document <input type="radio"/> Someone else changes a document created by me <input type="radio"/> Someone else changes a document last modified by me
When to Send Alerts Specify how frequently you want to be alerted.	<input checked="" type="radio"/> Send e-mail immediately <input type="radio"/> Send a daily summary <input type="radio"/> Send a weekly summary Time: <input type="text" value="Wednesday"/> <input type="text" value="4:00 PM"/>

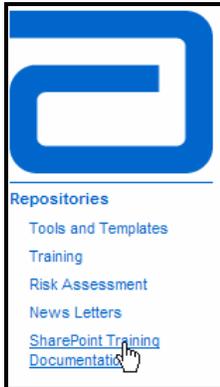
OK Cancel



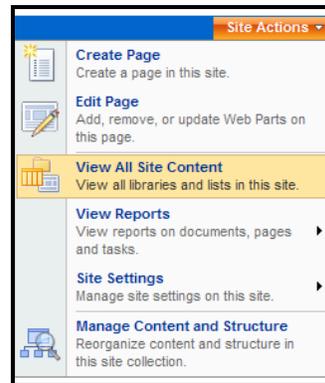
2.9. Version Control

2.9.1. Setting Document Version Control

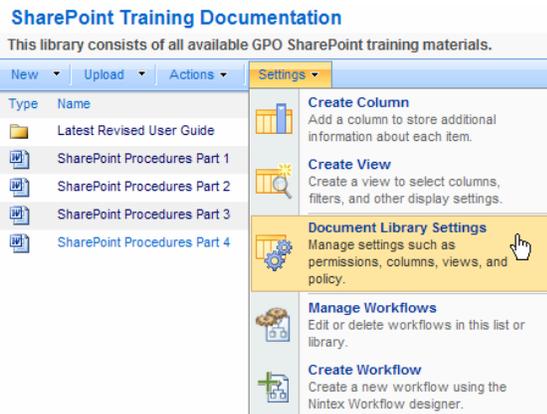
- From either **Quick Launch** or **View All Site Content**, navigate to the required library



Select either the Quick launch or **View All Site Content**. If the library does not appear in the Quick Launch area, then the **View All Site Content** must be chosen.

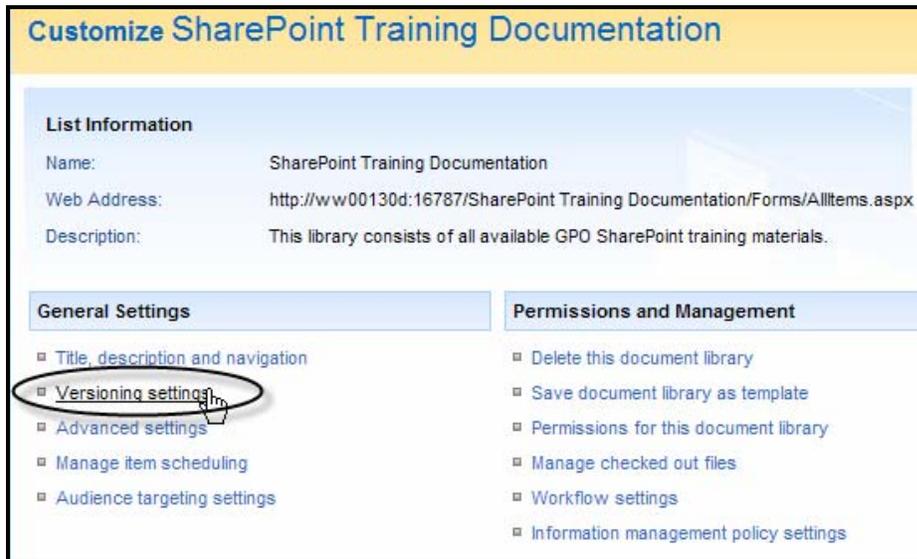


- Select Settings
- Select Document Library Settings





- In the General Settings area, select **Versioning settings**



- In the **Content Approval** area, determine whether new items or changed items should remain in a draft state until they have been approved. If they require approval, select **Yes**. Otherwise, select **No**.



- In the **Document Version History** area, specify whether a version is created each time a file is edited in this document library.



Document Version History
Specify whether a version is created each time you edit a file in this document library. [Learn about versions.](#)

Create a version each time you edit a file in this document library?

No versioning

Create major versions
Example: 1, 2, 3, 4

Create major and minor (draft) versions
Example: 1.0, 1.1, 1.2, 2.0

Optionally limit the number of versions to retain:

Keep the following number of major versions:

Keep drafts for the following number of major versions:

- o No versioning
- o Create major versions (e.g. Version 1, Version 2, etc.). Also, indicate the number of revised versions to keep.
- o Create major and minor versions (e.g. Version 1.0, Version 1.1, Version 2.0, Version 2.1, etc.). Also, indicate the number of revised versions to keep as well as the number of drafts of the major version to keep.
- Draft security: Who should view the drafts? Select one of the following options:
 - o Any user.
 - o Only users who have edit privileges.
 - o Only users who can approve items or the originator of the item.

Draft Item Security
Drafts are minor versions or items which have not been approved. Specify which users should be able to view drafts in this document library. [Learn about specifying who can view and edit drafts.](#)

Who should see draft items in this document library?

Any user who can read items

Only users who can edit items

Only users who can approve items (and the author of the item)

- Do the required documents need to be checked out before editing? Select **Yes** or **No**.
- Click **OK** and return to the document or library.

Require Check Out
Specify whether users must check out documents before making changes in this document library. [Learn about requiring check out.](#)

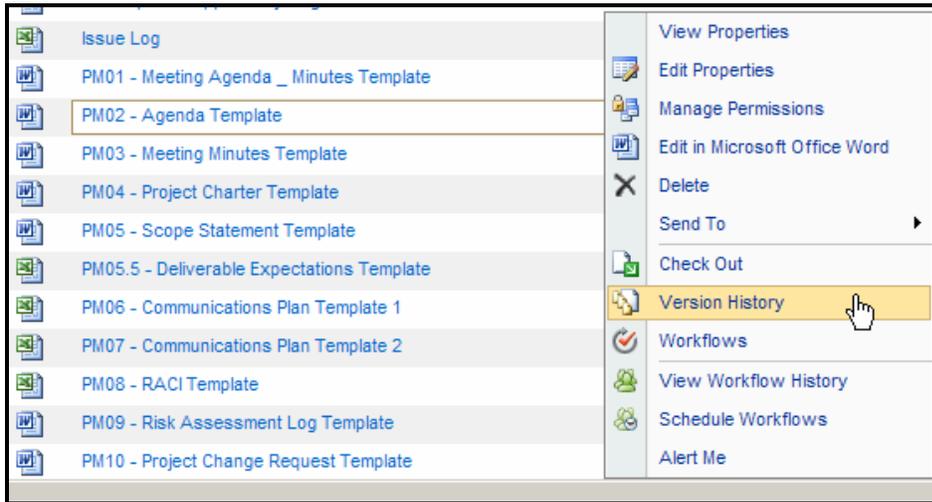
Require documents to be checked out before they can be edited?

Yes No

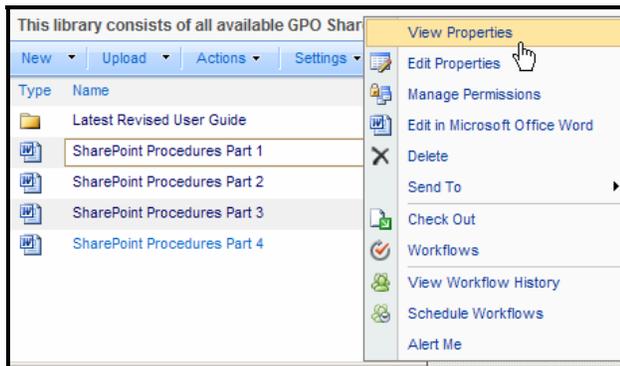


2.9.2. Managing Versions: View, Delete, Restore, Publish, Unpublish

- Navigate to the desired file/document
- Hover the mouse over the document and click on the down arrow
- In the drop down menu, select **Version History**



- If versioning has been turned off in the **Versioning Settings** for the library, then there will be no version history. The drop-down menu will look like the example below (with NO version control option):





- Notice that there are two sections. One section contains all of the major and minor revision of the document. The version that currently resides in the library is the latest version. From the illustration below, Version 1.3 is the version currently available in the library.

Versions saved for SharePoint Procedures Part 2.doc

All versions of this document are listed below with the new value of any changed properties.

Delete All Versions | Delete Minor Versions

No. ↓	Modified	Modified By	Size	Comments
1.3	1/27/2011 2:16 PM	Hauenstein, Rick R	60.5 KB	
1.2	1/27/2011 2:16 PM	Hauenstein, Rick R	60.5 KB	
1.1	1/27/2011 2:15 PM	Hauenstein, Rick R	60.5 KB	
This is the current published major version				
1.0	1/27/2011 2:06 PM	Hauenstein, Rick R	60.5 KB	
Title		Meeting Agenda		

- From the above screen, all major versions and/or minor versions can be deleted by clicking on the specific command.

Versions saved for SharePoint Procedures Part 2.doc

All versions of this document are listed below with the new value of any changed properties.

Delete All Versions | Delete Minor Versions

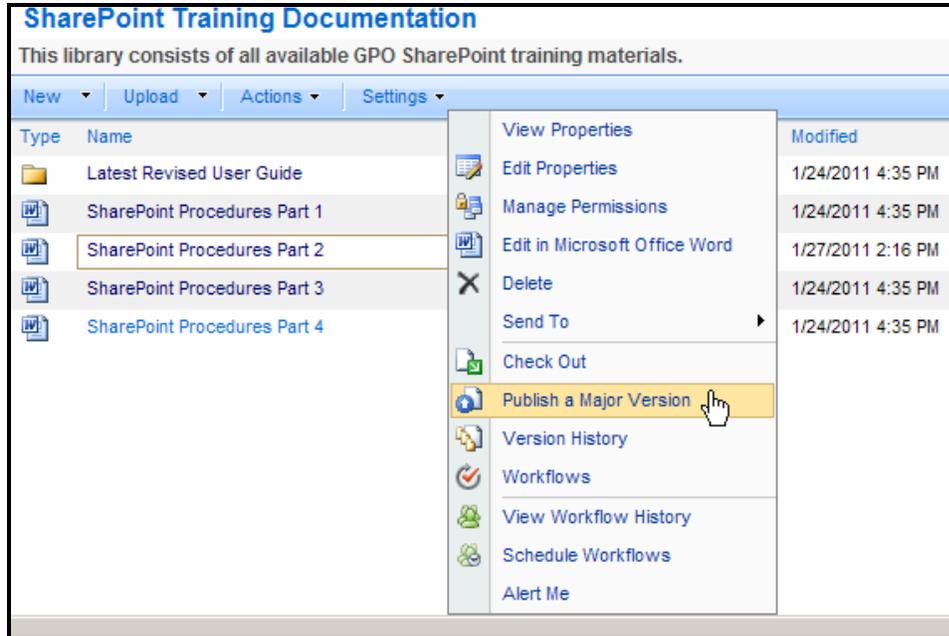
No. ↓	Modified	Modified By		
1.3	1/27/2011 2:16 PM	Hauenstein, Rick R		
1.2	1/27/2011 2:16 PM	Hauenstein, Rick R		
1.1	1/27/2011 2:15 PM	Hauenstein, Rick R		
This is the current published major version				
1.0	1/27/2011 2:06 PM	Hauenstein, Rick R		
Title		Meeting Agenda		

Context menu options: View, Restore, Delete

- If there is a **This is the current published major version** section (which will be highlighted), hover over the document to access the pull-down menu. Three choices are available:
 - **View**



- **Restore.** This option makes this version the one that is available in the library.
- **Unpublish this version.** “Publishing” a version means that those with access to the library can view the most recent version of the document.
- If there are no published versions but one is desired, return to the file/document and in the pull-down menu, select **Publish a Major Version**. This menu option toggles between “Publish” and “Unpublish” depending on the status of the viewable document.



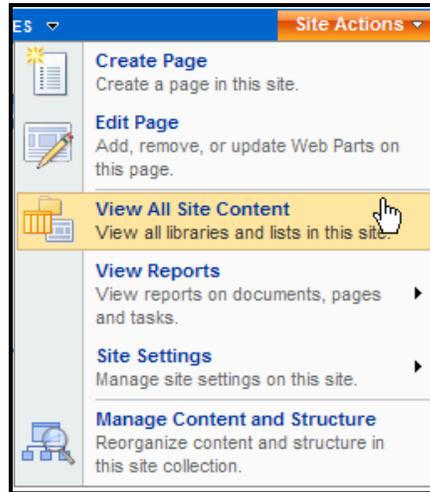
- Hover the cursor over any of the other versions. The user has the option to **View, Restore, Delete**
 - **View:** View the contents of that revision
 - **Restore:** Replaces the viewable file with this revised file
 - **Delete:** Deletes the revision. This does not change the revision numbers of other revised documents.



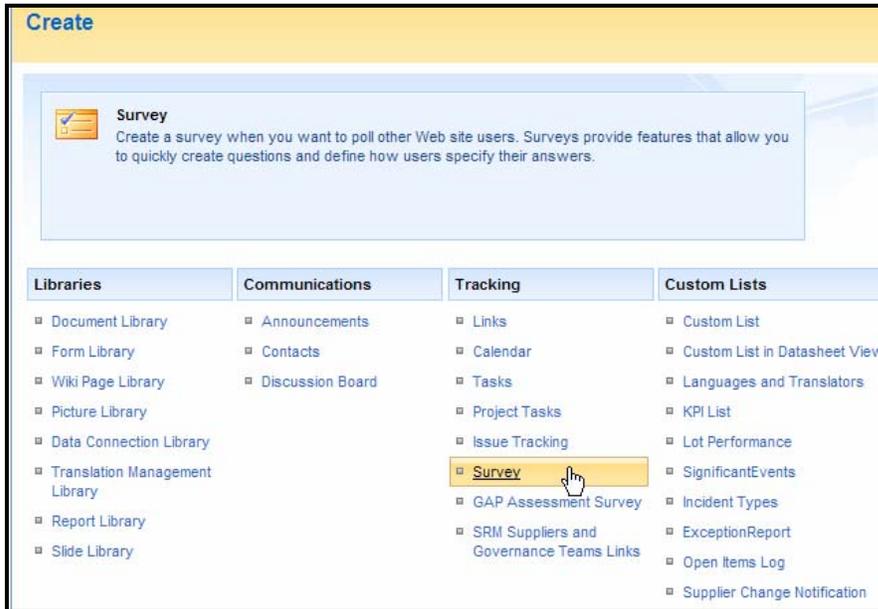
2.10. Surveys

2.10.1. Create a Survey

- Click Site Actions
- On the pull-down menu, click on **View All Site Content**



- On the All Site Content page, click on **Create**
- In the Tracking section of the Create page, click on **Survey**



- On the “New” page, complete the questionnaire details:
 - **Name** of the survey / **Description** of the survey
 - In the Navigation section, select whether or not the survey should be in the Quick Launch area. Generally, it should be readily available and accessible, so select **Yes**.
 - In the Survey options section, specify whether users' names will appear in survey results and whether users can respond to the same survey multiple times



GPO Procurement Home > Supplier Collaboration > Create > New

New

Name and Description Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this survey.	Name: <input type="text" value="ACME"/> Description: <input type="text" value="Selected survey questions for the ACME Corporation"/>
Navigation Specify whether a link to this survey appears in the Quick Launch.	<input type="checkbox"/> Display this survey on the Quick Launch? <input checked="" type="radio"/> Yes <input type="radio"/> No
Survey Options Specify whether users' names will appear in survey results and whether users can respond to the same survey multiple times.	Show user names in survey results? <input type="radio"/> Yes <input checked="" type="radio"/> No Allow multiple responses? <input type="radio"/> Yes <input checked="" type="radio"/> No

- Click **Next** when completed with this page
- The New Question page is displayed. Complete the responses for each survey question.
 - Type the question as it will appear on the survey.
 - Determine the type of answer to this question. There are twelve predetermined choice. The most common choices are **Single line of text** (generally for comments), **Multiple lines of text**, **Choice** (creates a drop-down menu, check box, or radio buttons), **Number** (e.g. 1 to 10, 1 to 100, etc.), **Yes/No** (checkbox – however, it is more user-friendly to use “Choice” to create radio buttons or checkboxes for “Yes” and “No”)



New Question: ACME Survey

Use this page to edit a question of this survey.

Question and Type

Type your question and select the type of answer.

Question:

For How Long has your company been using ACME Corporation as a supplier?

The type of answer to this question is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time

Additional Question Settings

Specify detailed options for the type of answer you selected.

Require a response to this question:

- Yes
- No

Type each choice on a separate line:

1 year to 2 years
More than 2 years up to 3 years
More than 3 years up to 4 years
More than 4 years up to 5 years

Display choices using:

- Drop-Down Menu
- Radio Buttons
- Checkboxes (allow multiple selections)

Allow 'Fill-in' choices:

- Yes
- No

Default value:

- Choice
- Calculated Value

Less than 1 year

- o The Branching logic section is not available at this step. To define branching logic, add the questions and in the Survey Settings page, edit



the questions to define the branching logic. Branching logic allows the survey to skip questions based on the response of a prior question.

Branching Logic

Specify if branching is enabled for this question. Branching can be used to skip to a specific question based on the user response. A page break is automatically inserted after a branching enabled question. [Learn about branching.](#)

To define branching logic, add your questions and then, in the Survey Settings page, edit the questions to define the branching logic.

- Click **Next Question** and repeat the above procedure.
- Click **Finish** when all the questions have been successfully created.
- The sample survey appears as follows:

ACME Survey: Respond to this Survey

For How Long has your company been using ACME Corporation as a supplier?

How would you rate their overall product quality?

	Low		Average		High	
	1	2	3	4	5	N/A
Product conforms to your quality specifications.	<input type="radio"/>					
Satisfies customers' preferences and expectations.	<input type="radio"/>					
Minimize retesting or replacing the product.	<input type="radio"/>					

How would you rate their customer service?

	Low		Average		High	
	1	2	3	4	5	N/A
Timely feedback on problems.	<input type="radio"/>					
Customer Care Reps are knowledgeable concerning the issue.	<input type="radio"/>					
Customer Care Reps understand the issues.	<input type="radio"/>					



How does ACME respond when a complaint is filed.

No response

Requires multiple calls.

Respond immediately but they address the issue at a later date

Respond immediately and works out a response plan to solve the problem.

Is ACME Corporation price competitive when compared with suppliers of the same/similar product?

Yes

No

Somewhat competitive.

Not competitive at all

Does ACME operate any Vendor Managed Inventory (VMI) / ship to stock programs?

Yes

No

Do not know

Does ACME provide cost saving initiatives to reduce cost base year on year?

Yes

No

Do not know

Please comment about this supplier

2.10.2. Edit Survey

- From **Quick launch** (or **View All Site Content**), select the survey that needs to be modified.



Surveys		
ACME Survey	Selected survey questions for the ACME Corporation	10 2 hours ago
nancy's template		0 3 weeks ago

Sites and Workspaces		
ACME Corporation - Lake County	Workspace for ACME Corporation - Lake County	3 hours ago

- Select **Settings** and then select **Survey Settings**. Note that questions can be added from this same pull-down menu.

ACME Survey
Selected survey questions for the ACME Corporation

[Respond to this Survey](#) | **Actions** ▾ | **Settings** ▾

Survey Name:	ACME Survey
Survey Description:	Selected survey questions for the ACME Corporation
Time Created:	2/11/2014 10:00 AM
Number of Responses:	10

[Show a graphical summary of responses](#)

[Show all responses](#)

Add Questions
Add an additional question to this survey.

Survey Settings
Manage questions and settings for this survey.

- The questions appear in the **Questions** section of the **Customize** survey page.
- Each question can be modified by clicking on the question.



Questions			
A question stores information about each item in the survey. The following questions are currently available in this survey:			
Question	Type of answer	Required	Branching Logic
For How Long has your company been using ACME Corporation as a supplier?	Choice		
How would you rate their overall product quality?	Rating Scale		
How would you rate their customer service?	Rating Scale		
How does ACME respond when a complaint is filed.	Choice		
Is ACME Corporation price competitive when compared with suppliers of the same/similar product?	Choice		
Does ACME operate any Vendor Managed Inventory (VMI) / ship to stock programs?	Choice		
Does ACME provide cost saving initiatives to reduce cost base year on year?	Choice		
Please comment about this supplier	Multiple lines of text		

GPO Procurement Home > Supplier Collaboration > ACME Survey > Settings > Edit Question

Edit Question: ACME Survey

Use this page to edit a question of this survey.

Question and Type
Type your question and select the type of answer.

Question:
For How Long has your company been using ACME Corporation as a supplier?

The type of answer to this question is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time

- If the survey contains multiple questions, the **Branching Logic** section is available. Depending on the answer from the question being modified, the branching logic has a pull-down menu with all the other questions. This



allows the user skip the next question(s) or to go to any other question based on the user’s responses. The default for **Branching Logic** is **No Branching**.

- The survey requires a minimum of two questions before “Branching Logic” is available.
- Each response has the option to branch to one of the other questions. All of the possible questions are displayed in the drop-down menu. Branching occurs whenever the predetermined response is chosen.
- Click OK when the edits to the question are completed.
- This returns the user to the **Customize** (or Edit) page.
- To add a question, simply click on the **Add a question** link



- The order of the questions can be changed by clicking on the **Change the order of the questions** link





GPO Procurement Home > Supplier Collaboration > ACME Survey > Settings > Change Field Order

Change Question Order: ACME Survey

Use this page to change the order of the questions.

Question Order

Choose the order of the questions by selecting a number for each question under "Position from Top".

Changing the order of questions that are involved in branching may reset some of the defined branching logic. [Learn about branching.](#)

Question Name	Position from Top
For How Long has your company been using ACME Corporation as a supplier?	1
How would you rate their overall product quality?	2
How would you rate their customer service?	3
How does ACME respond when a complaint is filed.	4
Is ACME Corporation price competitive when compared with suppliers of the same/similar product?	5
Does ACME operate any Vendor Managed Inventory (VMI) / ship to stock programs?	6
Does ACME provide cost saving initiatives to reduce cost base year on year?	7
Please comment about this supplier	8

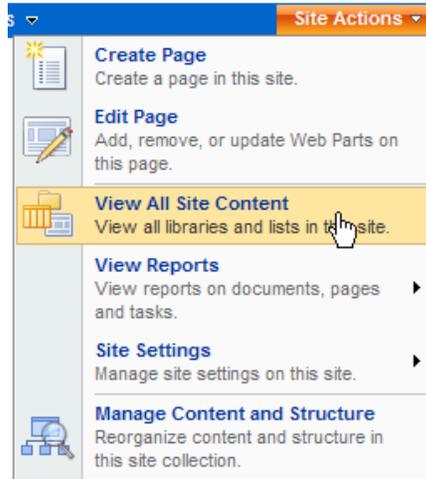
OK Cancel

- Click **OK** when the editing is complete.

2.10.3. Respond to Survey

- Use the menu bar to navigate to the location of the survey.





Surveys

- ACME
- Baxter Labs This template has many of the same characteristics as the ACME template.
- nancy's template

Sites and Workspaces

- ACME Corporation - Lake County Workspace for ACME Corporation - Lake County

ACME

Respond to this Survey | Actions | Settings

Respond to this Survey

Survey Name:	ACME
Survey Description:	
Time Created:	2/15/2011 9:03 AM
Number of Responses:	0

Show a graphical summary of responses

Show all responses



ACME: Respond to this Survey

Finish Cancel

For How Long has your company been using ACME as a supplier?

Less than 1 year

How would you rate their overall product quality?

	Low 1	2	Average 3	4	High 5	N/A
Product conforms to your quality specifications.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Satisfies customers' preferences and expectations.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Minimize retesting or replacing the product.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

How would you rate their customer service?

	Low 1	2	Average 3	4	High 5	N/A
Timely feedback on problems.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer Care Reps are						

ACME

Respond to this Survey Actions Settings

Survey Name:	ACME
Survey Description:	
Time Created:	2/15/2011 9:03 AM
Number of Responses:	1

Show a graphical summary of responses

Show all responses



2.10.4. Create a Survey Template

- Create the survey as described in Section 2.10.1 Create a Survey and Section 2.10.2 Edit a Survey.
- From **Quick launch** (or **View All Site Content**), select the survey that needs to be saved as a template.

Surveys			
	ACME Survey	Selected survey questions for the ACME Corporation	10 2 hours ago
	nancy's template		0 3 weeks ago
Sites and Workspaces			
	ACME Corporation - Lake County	Workspace for ACME Corporation - Lake County	3 hours ago

ACME Survey

Selected survey questions for the ACME Corporation

[Respond to this Survey](#) | [Actions](#) | [Settings](#)

Survey Name:	ACME Survey
Survey Description:	Selected survey questions for the ACME Corporation
Time Created:	2/1/2015 10:00 AM
Number of Responses:	10

Add Questions
Add an additional question to this survey.

Survey Settings
Manage questions and settings for this survey.

[Show a graphical summary of responses](#)

[Show all responses](#)

- In the *Permissions and Management* area of the Customize page, select Save survey as template.



Customize ACME Survey

List Information

Name: ACME Survey

Web Address: <http://www00130d:16787/SupplierCollab/Lists/ACME Survey/overview.aspx>

Description: Selected survey questions for the ACME Corporation

General Settings

- Title, description and navigation
- Advanced settings
- Audience targeting settings

Permissions and Management

- Delete this survey
- Save survey as template
- Permissions for this survey
- Workflow settings
- Information management policy settings

- The template requires:
 - A **File name**: the filename is used for internal tracking of the template.
 - A **Template name**: the template name is the name used whenever referring to the template for other applications. The template name and the file name can be the same.



GPO Procurement Home > Supplier Collaboration > ACME > Settings > Save as Template

Save as Template: ACME

Use this page to save your survey as a template. Users can create new surveys from this template.

File Name Enter the name for this template file.	File name: <input type="text" value="ACME"/> .stp
Name and Description The name and description of this template will be displayed on the Create page.	Template name: <input type="text" value="ACME"/> Template description: <input type="text" value="The ACME template is to be used for all customers with similar characteristics as ACME"/>
Include Content Include content in your template if you want new surveys created from this template to include the items in this survey. Including content can increase the size of your template. Caution: Item security is not maintained in a template. If you have private content in this survey, enabling this option is not recommended.	<input checked="" type="checkbox"/> Include Content

OK Cancel

- Make sure the **Include Content** box is checked. This will include library and list content in the template.

GPO Procurement Home > Supplier Collaboration > Operation Completed Successfully

Operation Completed Successfully

The template has successfully been saved to the list template gallery. You can now create lists based on this template.

To manage templates in the gallery, go to the [list template gallery](#).

To return to the list customization page, click OK.

OK

- Click on the list template gallery for all of the templates used in this SharePoint collection, including the one just created.

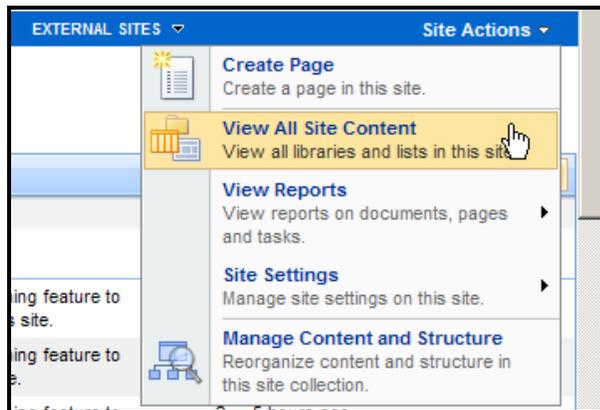


List Template Gallery
Make a template available for use in list creation by adding it to this gallery. The templates in this gallery are available to this site and all sites under it. Default list templates are not shown.

Name	Edit	Modified	Title	Language	Product Version	Feature ID
Lot Performance		10/5/2010 2:21 PM	Lot Performance	English	3	{00BFEA71-DE22-43B2-A848-C05709900100}
TPM Master Copy		1/17/2011 8:05 PM	TPM Master Copy	English	3	{00BFEA71-DE22-43B2-A848-C05709900100}
List Number Master		1/17/2011 8:46 PM	List Number Master	English	3	{00BFEA71-DE22-43B2-A848-C05709900100}
SupplierComments		1/18/2011 10:40 PM	SupplierComments	English	3	{00BFEA71-DE22-43B2-A848-C05709900100}
Suppliers		1/19/2011 8:20 AM	Suppliers	English	3	{00BFEA71-DE22-43B2-A848-C05709900100}
SRMGAPAssessmentSurveyTemplates		1/19/2011 8:25 AM	SRMGAPAssessmentSurveyTemplates	English	3	{00BFEA71-DE22-43B2-A848-C05709900100}
SupplierSelectionToolComments		1/20/2011 10:30 AM	SupplierSelectionToolComments	English	3	{00BFEA71-DE22-43B2-A848-C05709900100}
nancy template		1/25/2011 10:53 AM	nancy template	English	3	{00BFEA71-EB8A-40B1-80C7-506BE7590102}
tutorial		2/14/2011 8:25 AM	Assessment Survey	English	3	{00BFEA71-EB8A-40B1-80C7-506BE7590102}
ACME		2/14/2011 12:26 PM	ACME	English	3	{00BFEA71-EB8A-40B1-80C7-506BE7590102}
ACME_template		2/14/2011 3:49 PM	ACME	English	3	{00BFEA71-EB8A-40B1-80C7-506BE7590102}

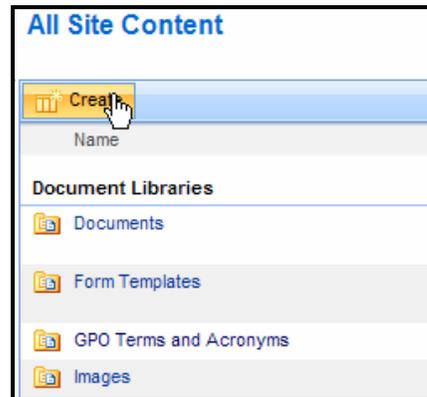
2.10.5. Copy a Survey Template

- **Note:** Before attempting to copy a survey template, the source site and the destination site must be based on the same site template.
- Navigate to the site where the survey will be located.
- Go to Site Actions and select View All Site Content

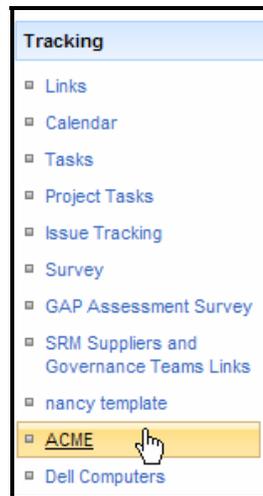




- On the **All Site Content** page, click on **Create**.



- On the **Create** page, go to the **Tracking** section and select the template to be copied – in this example, select **ACME**.



- This opens the **New** page. Enter the new template name. For this example, the new survey template name is **Baxter Labs**.
- Include a brief description of this new template to avoid confusion in the future.



- Select **No** for the navigation. This template does not need to appear in the **Quick Launch** area.

- Click **Next** and the new survey page for Baxter Labs appears.
- Go to *Settings* and select Survey Settings.

- Make all changes to the new template from this screen.



Customize Baxter Labs

List Information

Name: Baxter Labs
Web Address: <http://www00130d:16787/SupplierCollab/Lists/Baxter Labs/overview.aspx>
Description: This template has many of the same characteristics as the ACME template.

General Settings

- Title, description and navigation
- Advanced settings
- Audience targeting settings

Permissions and Management

- Delete this survey
- Save survey as template
- Permissions for this survey
- Workflow settings
- Information management policy settings

Questions

A question stores information about each item in the survey. The following questions are currently available in this...

Question	Type of answer	Required
For How Long has your company been using ACME Corporation as a supplier?	Choice	

- Select Save Survey as Template

2.10.6. Review Survey Results

- From Quick launch (or View All Site Content), select the survey.
- To take the survey, click on **Respond to this Survey** link.



ACME

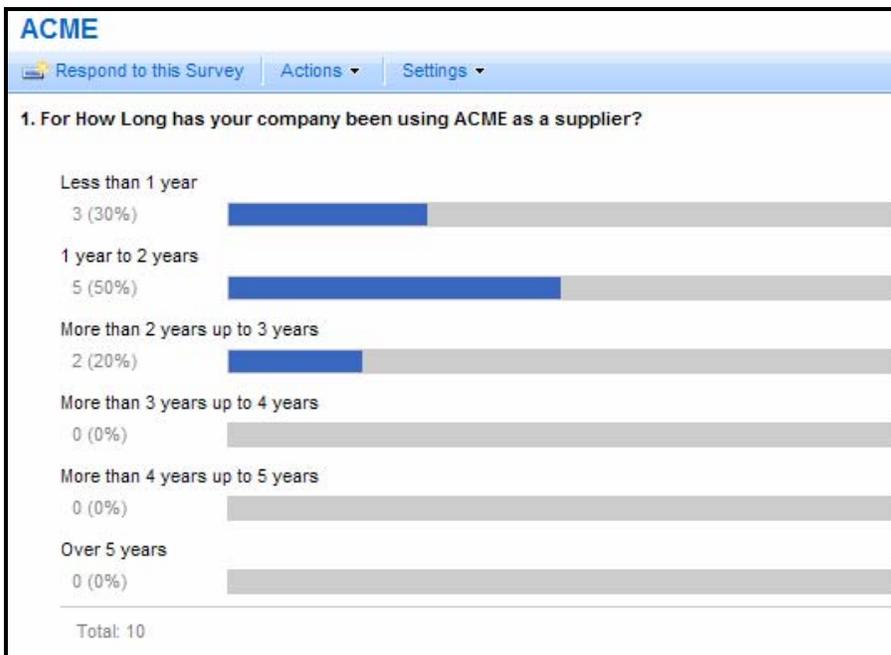
Respond to this Survey | Actions | Settings

Survey Name:	ACME
Survey Description:	
Time Created:	2/15/2011 9:03 AM
Number of Responses:	10

[Show a graphical summary of responses](#)

[Show all responses](#)

- Note that the above survey has 10 responses (**Number of Responses**)
- Click on Show a graphical summary of responses
- Each question shows the graphic results of the survey.
- The results for question number 1 is as follows:





- All questions are displayed graphically.



- Click on **Show all responses**. This will be a view of all users who responded. Click on the user name and their responses will be displayed.



View Response	Created By
View Response #1	***
View Response #2	***
View Response #3	***
View Response #4	***
View Response #5	***
View Response #6	***
View Response #7	***
View Response #8	***
View Response #9	***
View Response #10	***

- All 10 users' responses are available.
- Select any one of the responses. Note that there is no entry in the **Created By** column. This was set during the editing of the survey in **Survey General Settings (Show user names in survey results?)**



ACME: View Response #1 Close

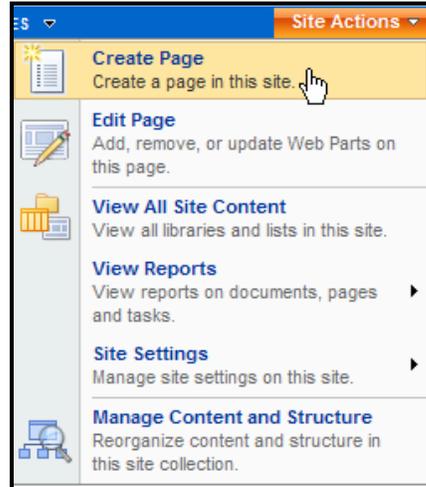
[New Response](#) | [Edit Response](#) | [Delete Response](#) | [Manage Permissions](#) | [Alert Me](#)

For How Long has your company been using ACME as a supplier?	Less than 1 year					
How would you rate their overall product quality?		Low	Average		High	N/A
		1	2	3	4	5
Product conforms to your quality specifications.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Satisfies customers' preferences and expectations.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Minimize retesting or replacing the product.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
How would you rate their customer service?		Low	Average		High	N/A
		1	2	3	4	5
Timely feedback on problems.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer Care Reps are knowledgeable concerning the issue.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer Care Reps understand the issues.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer Service solves the issue during the first contact, ie, no repeat contacts are required.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How does ACME respond when a complaint is filed.	Requires multiple calls.					
Is ACME price competitive when compared with suppliers of the same/similar product?	No					
Does ACME operate any Vendor Managed Inventory (VMI) / ship to stock programs?	No					
Does ACME provide cost saving initiatives to reduce cost base year on year?	Yes					
Please comment about this supplier	ACME is on probation as a prime contractor.					
Created at 2/16/2011 9:05 AM by *** Last modified at 2/16/2011 9:05 AM by ***						
						Close



2.11. Create Additional Sites

- Go to Site Actions and click on Create Page



- Enter the **Title** and a comprehensive **Description** about the site. The **URL** is automatically selected based on the title name. However, a different URL can be used. Note that this URL will always be the location for this site. Changing it after the site is created can and will cause broken links within SharePoint.

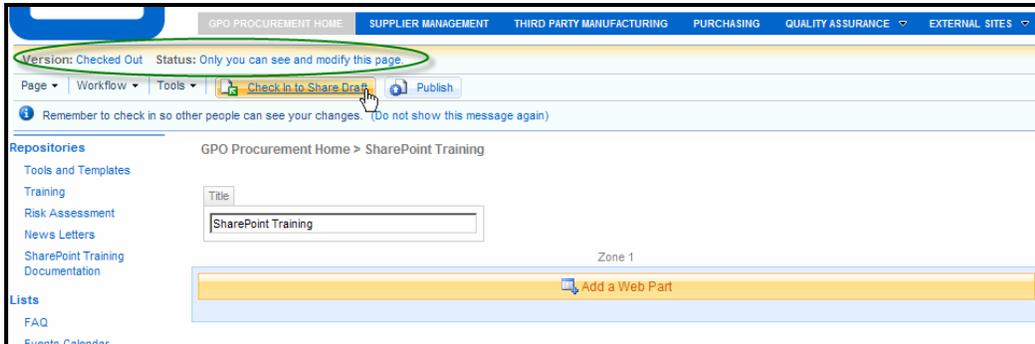
The screenshot shows the 'Create Page' form in SharePoint. The form has a blue header with navigation links: 'SUPPLIER MANAGEMENT', 'THIRD PARTY MANUFACTURING', 'PURCHASING', 'QUALITY ASSURANCE', 'EXTERNAL SITES', and 'Site Actions'. Below the header, the breadcrumb 'GPO Procurement Home > Pages > Create Page' is visible. The main form area is titled 'Create Page' and contains a section for 'Page Title and Description' with the instruction 'Enter a URL name, title, and description for this page.' The form fields are: 'Title' (containing 'SharePoint Training'), 'Description' (containing 'This site contains all of the SharePoint training documents and tutorials'), and 'URL Name' (containing 'Pages/SharePointTraining.aspx').



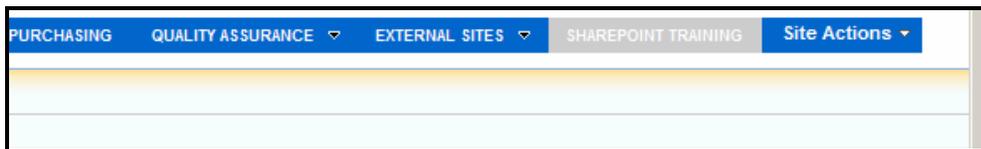
- At the bottom of the Create Page, click **Create**.



- Initially, the new site/page is **Checked Out** (Only the creator can view the site)



- Enter a new title or leave the existing title which was created on the Create Page.
- Add Web Parts and modify the page until it meets the user's specifications. Modifying and adding Web parts were described in Section 2.6 (**Web Parts**)
- **Check In to Share Draft**. The site name (**SHAREPOINT TRAINING**) now appears on the site bar.

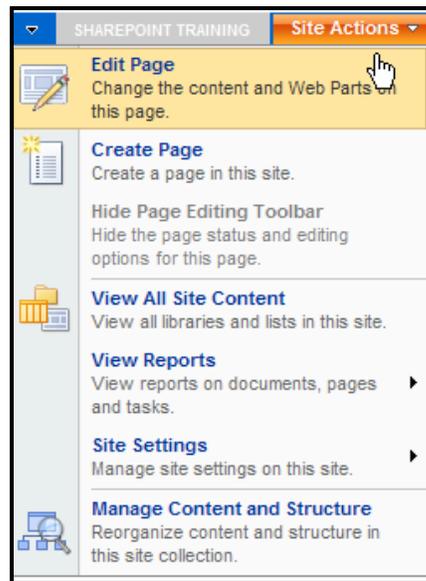


- **Publish** the site.

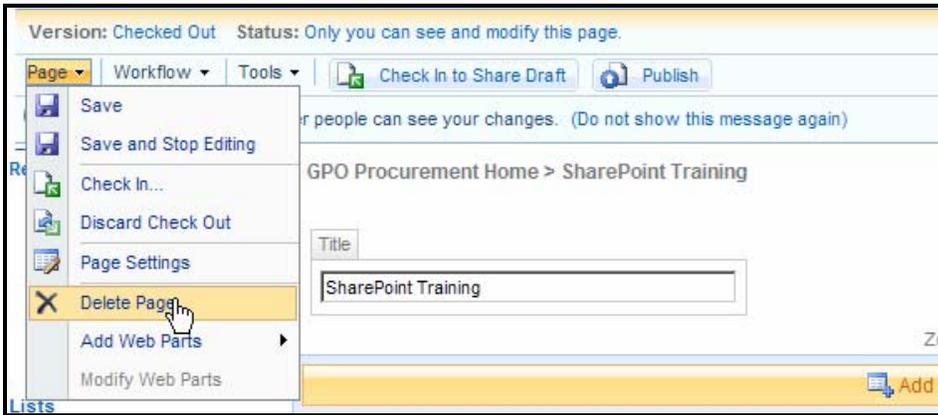


2.12. Remove a Site

- Go to Site Actions and click Edit Page



- Go to **Page** and select **Delete Page**



- Click **OK** and the site is removed. Verify that it has also been removed from the Site bar.

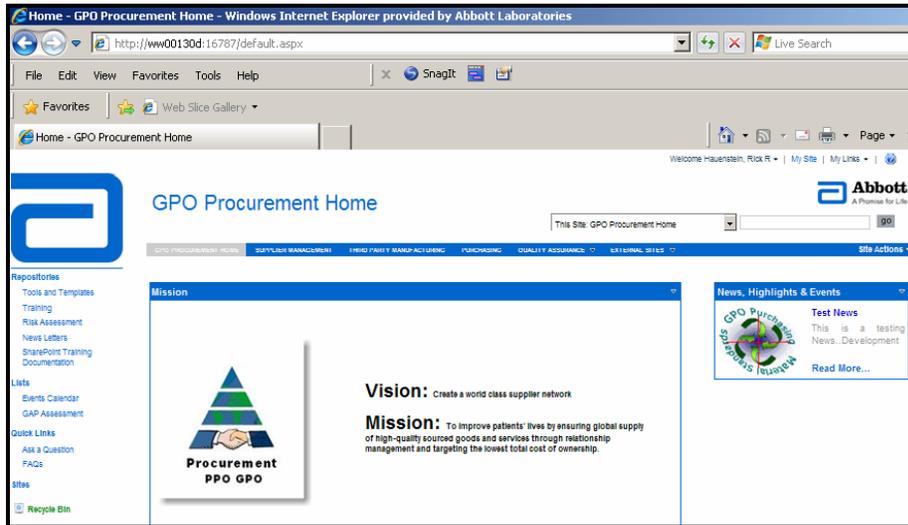


2.13. Create External Site

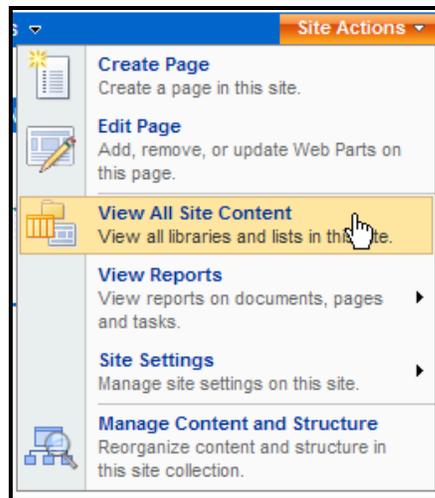
- External sites are created by contacting the business administrator or they are created by the external third party.

2.14. Create a Simple Wiki Library

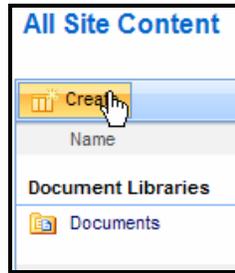
- Determine where the Wiki library will be located. Once the location is established, it will always be located in that particular SharePoint site. For this example, it is to be placed on the GPO procurement home page.



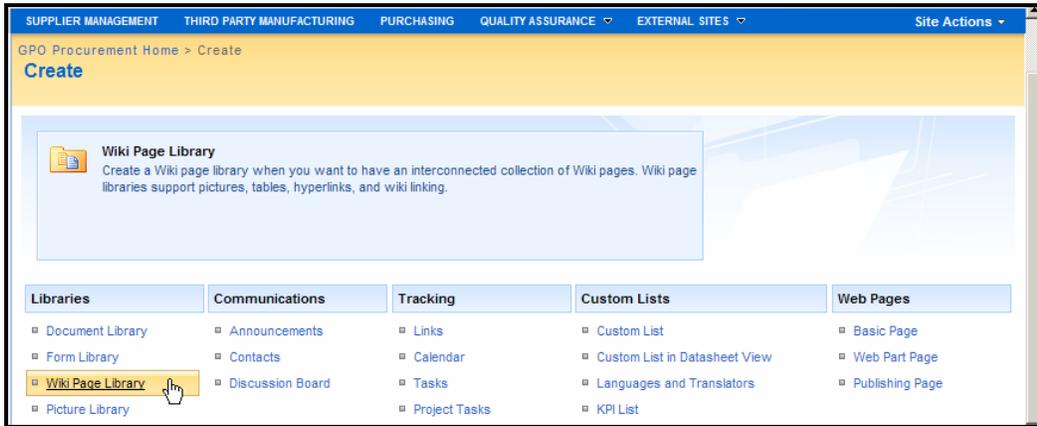
- Go to Site Actions and select View All Site Content.



- On the All Site Content page, select Create



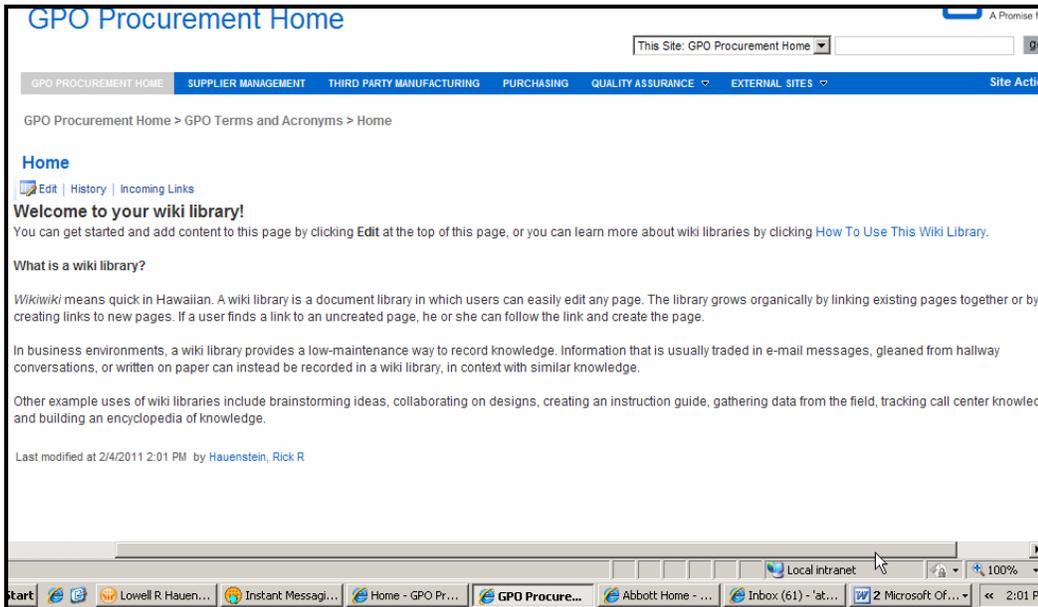
- This opens the **Create** page. Under the **Libraries** column, select **Wiki Page Library**

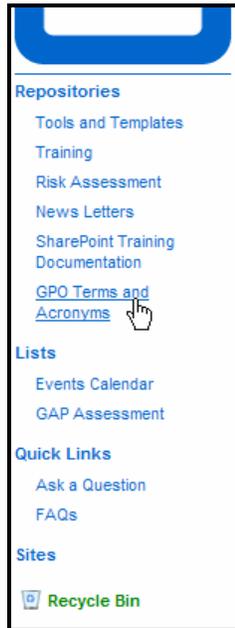


- Type the **Name** for this Wiki library and a **Description**. Also, select **Yes** so the Wiki library's link appears in the quick Launch area.

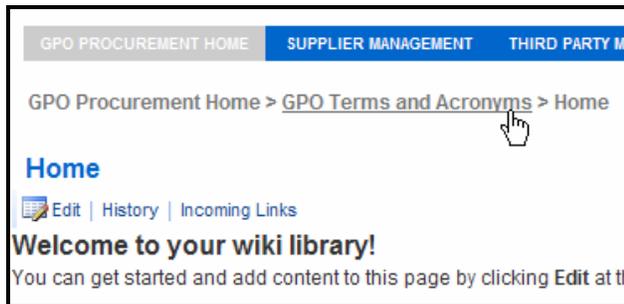


- Click Create
- This opens a Welcome screen.
- Also note that the Wiki library link appears in the Quick Launch area.

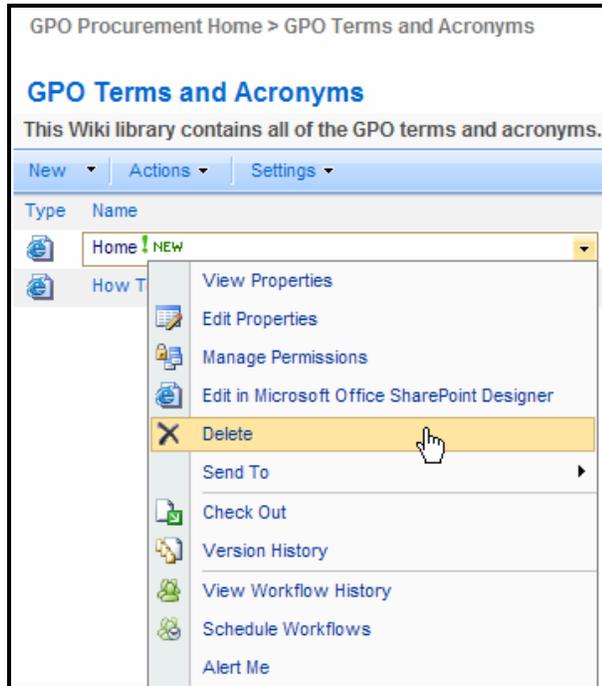




- Click on the navigation link to go to the library that was just created.



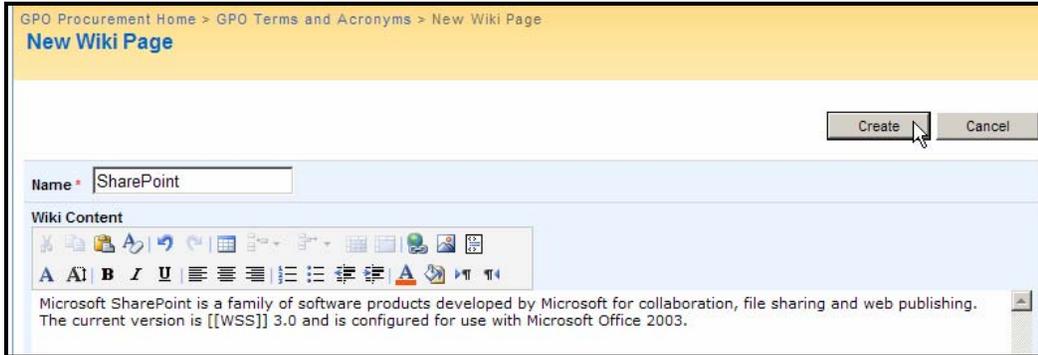
- There should be two or more items currently in the library. Delete all items.



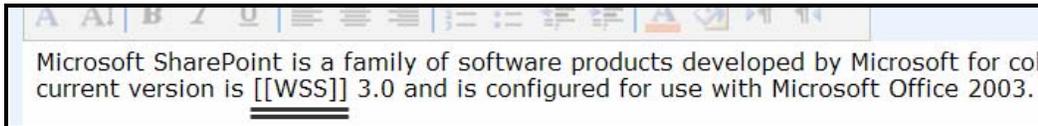
- There should now be an empty library page, select **New** and then **New Wiki Page**



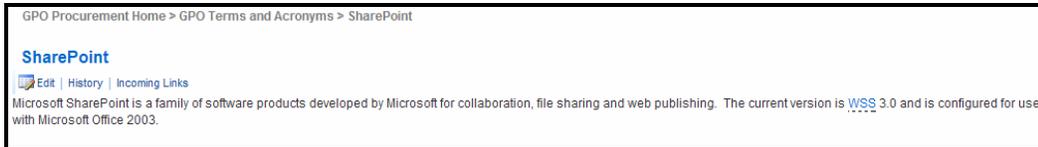
- Since the purpose of this Wiki library is for definition of terms and acronyms, begin adding pages. The first one to add is SharePoint (or whichever acronym/term the user wants to define)
- The **Name** is **SharePoint**. The **Wiki Content** is the definition of the term.



- Notice that the term WSS requires a definition. In Wiki pages, links are created by surrounding the term by straight brackets, [[WSS]]. This makes WSS a link to another Wiki page called WSS.



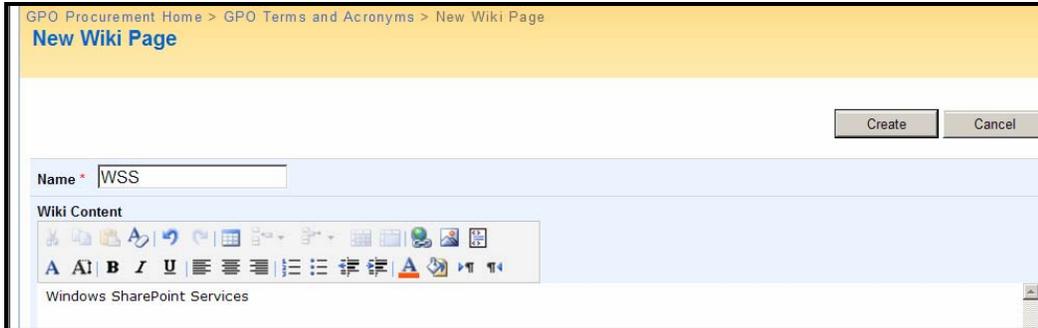
- Click **Create**. The SharePoint Wiki page is shown below, with WSS highlighted as a link.



- Notice that there is a broken line under WSS. This means there is no Wiki page for this entry. In order to make the page, simply double-click on the highlighted WSS to open a **New Wiki Page**.



- The **Name** field is already filled in. Just add the **Wiki Content**.
- Click **Create** and the new entry, WSS, has now been added to the library



- Click on the **GPO Terms and Acronyms** to return to the Wiki library page. Both new entries are now in the library.
- Repeat this procedure every time a new term/acronym is added. SharePoint will put the entries in alphabetical order.



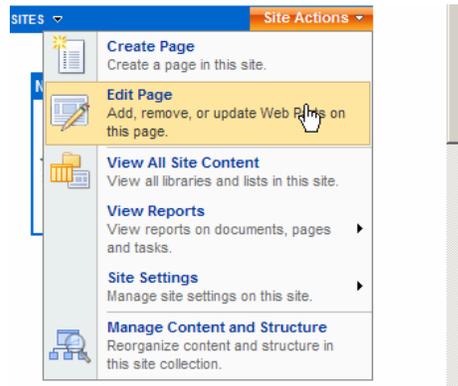


2.15. Executing a Search Query

- Search for content from the **Search** box near the top of most pages
- The administrator can modify or remove the **Search** box or its scope list, and change its appearance on the site.

2.15.1. Add a Simple Search Web Part

- Refer to Section 2.6 Web Parts for editing this web part.
- From the Site Menu bar, select Site Actions and Edit Page

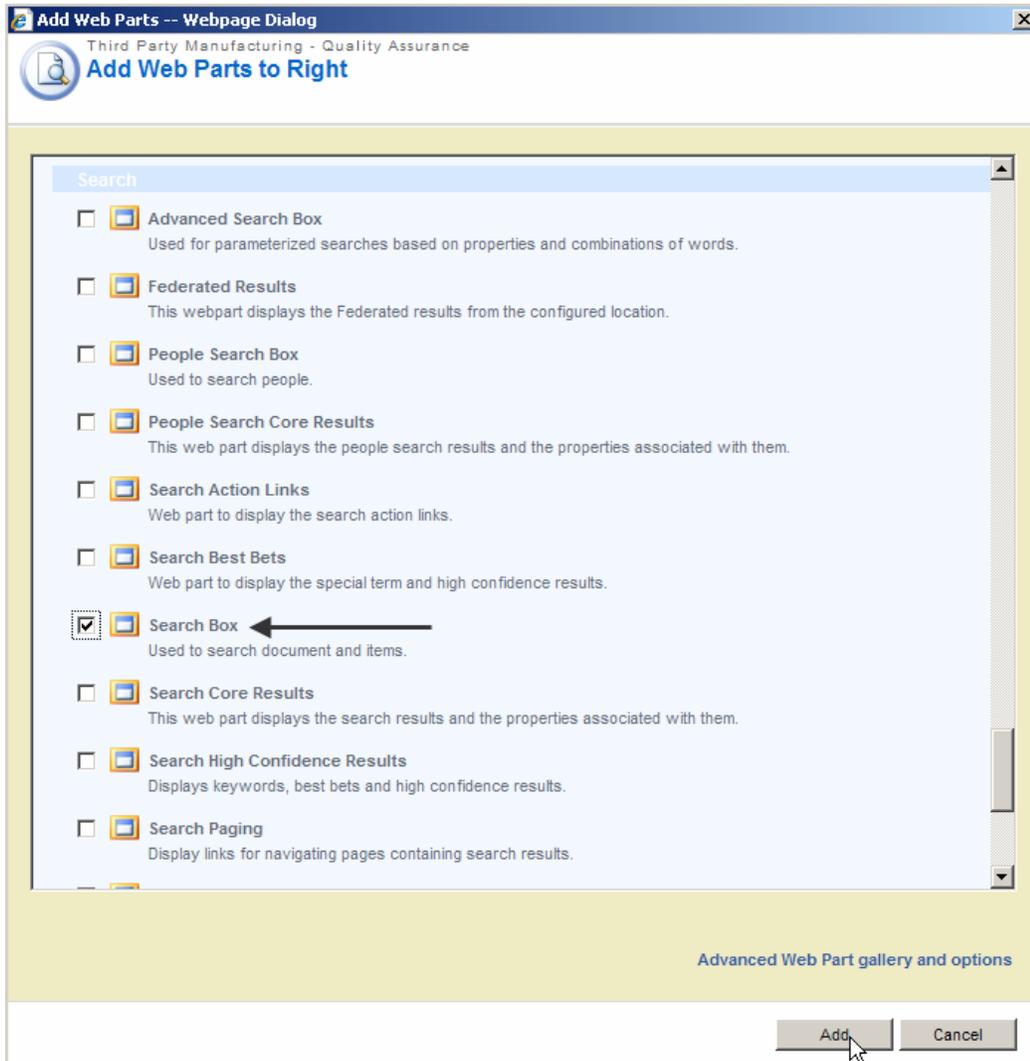


- The web part edit mode is now available. Click on **Add a Web Part** in either the right or left zone.





- The **Add Web Parts to Left** (or Right) menu appears. Check the search boxes desired.
- Multiple items may be selected but the most common search box is **Search Box** (for simple searches).



- The following illustrates the simple **Search Box**



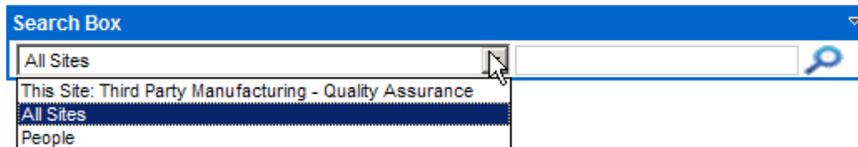
- This web part can be edited by following the procedures in Section 2.6.4 Edit/Modify a Shared Web Part.

2.15.2. Performing a Simple Search Query

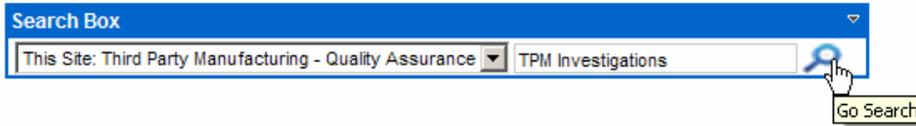
- The site collection may already have a search box created by the SharePoint administrator. By default, an administrator with shared services administration permissions can administer the site collection that includes the Search Center, and edit that site as its site owner. These permissions enable the administrator to change or remove the scope list, and to modify other search features.



- Adding a Search Web Part can often widen the scope of the search as shown below:
 - Searches ALL sites in the collection of sites (broadest scope)
 - Searches the current site (narrowest scope)
 - Performs a People search from the active directory



- Select a scope from the drop-down list in the **Search Box**.



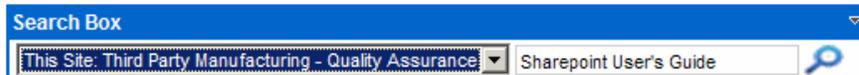
- Type a query in the **Search** box. This can include words, quoted phrases, and terms that use keywords and properties.
- Separate terms with spaces. A query cannot exceed 200 characters.



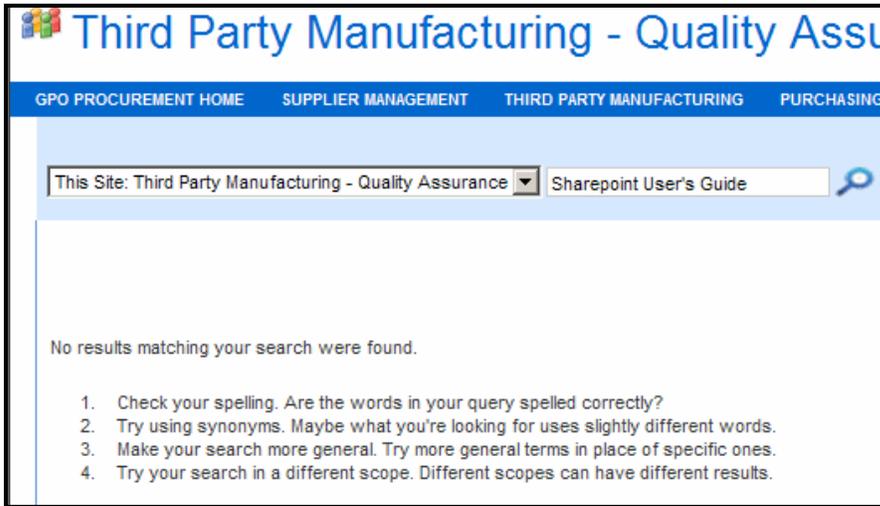
- Click the **Go Search** icon to display the search results.
- The core search results are sorted by their relevance to the query. To sort them by date, click **View by Modified Date**.
- The results of the above query for ONLY the QA/TPM site is shown below:



- The next search is for the same site but a different document.



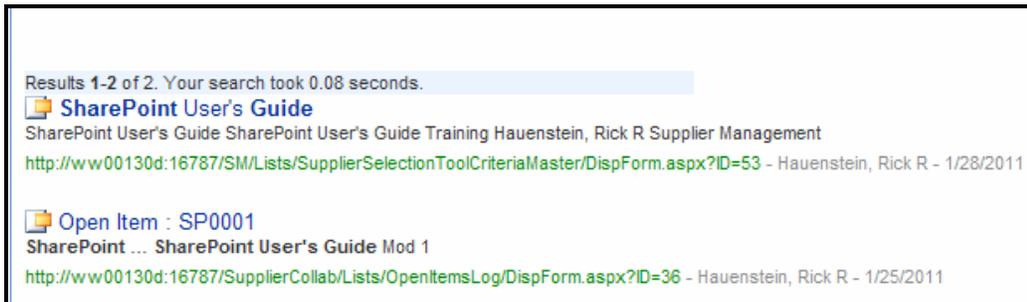
- The scope was too narrow to yield any results. In other words, there was no document, **SharePoint user's Guide**, in the QA/TPM site.



- Change the scope and perform the same query. Note that the query term is in quotation marks. This will return anything that matches the entire string, **SharePoint User's Guide**.

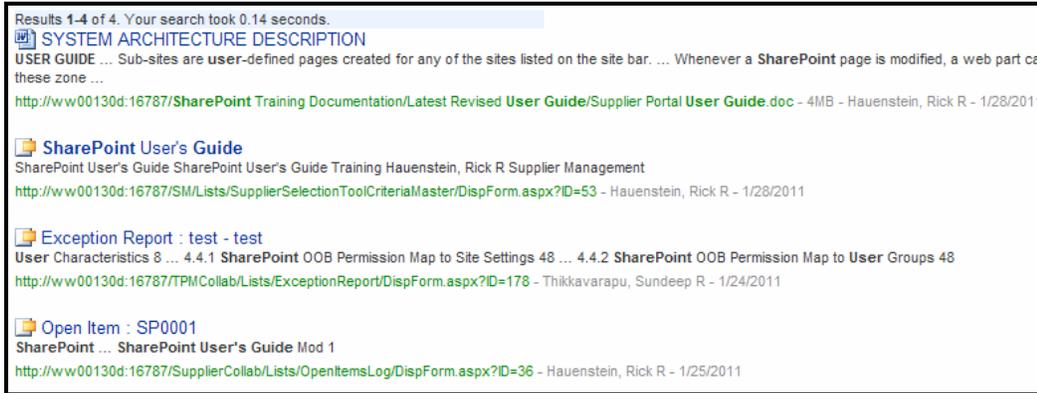


- The query returns the document(s) being searched.





- Without the quotation marks, the query returns items that include the words (or portions of the words) SharePoint, User's, or Guide, in no particular order. Refer to the sample query result below. For example, the words **Guidelines** or **User** will be returned as a valid search result.



2.15.3. Basics for a SharePoint Search Query

- A query includes words, quoted phrases, and terms that use keywords and properties. Separate terms with spaces.
- Text boxes for queries permit a maximum of 200 characters. Commonly used words such as "the," "it," and "by," and single-digit numbers, are ignored.
- When a phrase is enclosed in quotation marks, the search returns content that contains the exact phrase within the quotation marks.
- When words are entered that are separated by spaces, the search returns content that contains all of the words, in any order. For example, to find both "apples" and "oranges," type **apples oranges**.
- Type properties with values to match in the form **property:value**. Values are not case-sensitive.
- Enclose a property value in quotation marks to find an exact match, or leave the value unquoted to find partial matches that begin with the letters that are typed. For example, for **filename:"Budget"** (with quotation marks), the search returns a file named "Budget.xlsx." A search for **filename:budget**



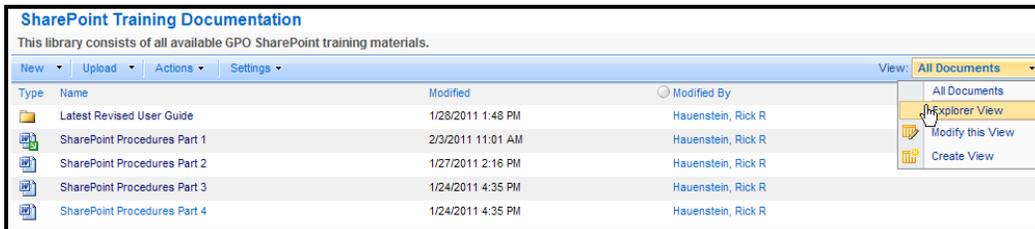
(without quotation marks) returns that file, as well as the files ***Budget_Current.xlsx*** and ***Budget_Next.xlsx***.

- To exclude content that is marked with a certain property value from a search results, place a minus sign (-) before the name of the property. For example, if a ***technology*** property is available, appending ***-technology:mobile*** to the query excludes content about mobile technologies from the search results.
- A query must include a term to find. Queries that consist only of terms to exclude will produce an error message.
- Searches on a term that is defined by the site collection administrator as a keyword or one of its synonyms, the definition of that keyword and its Best Bet links (if any) are featured at the beginning of the search results.
- Attachments to list items are not included in search results.

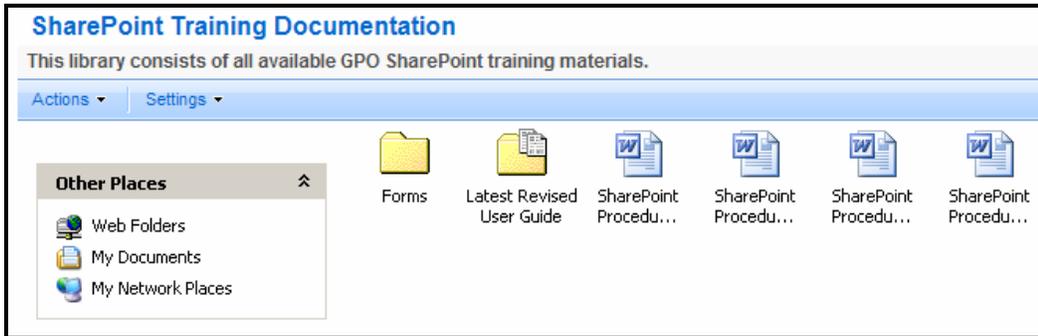
2.16. Security and Permissions

2.17. Using Windows Explorer to Manage Directories/Files

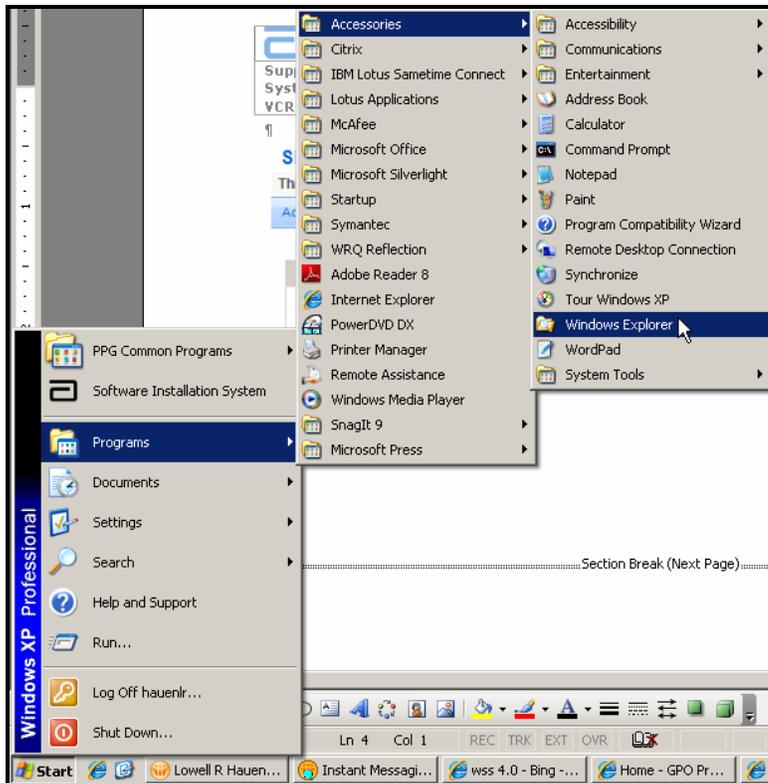
- Navigate to the desired SharePoint Document/Picture (Image) directory.



- Select **Explorer View** in the **View** drop-down menu.

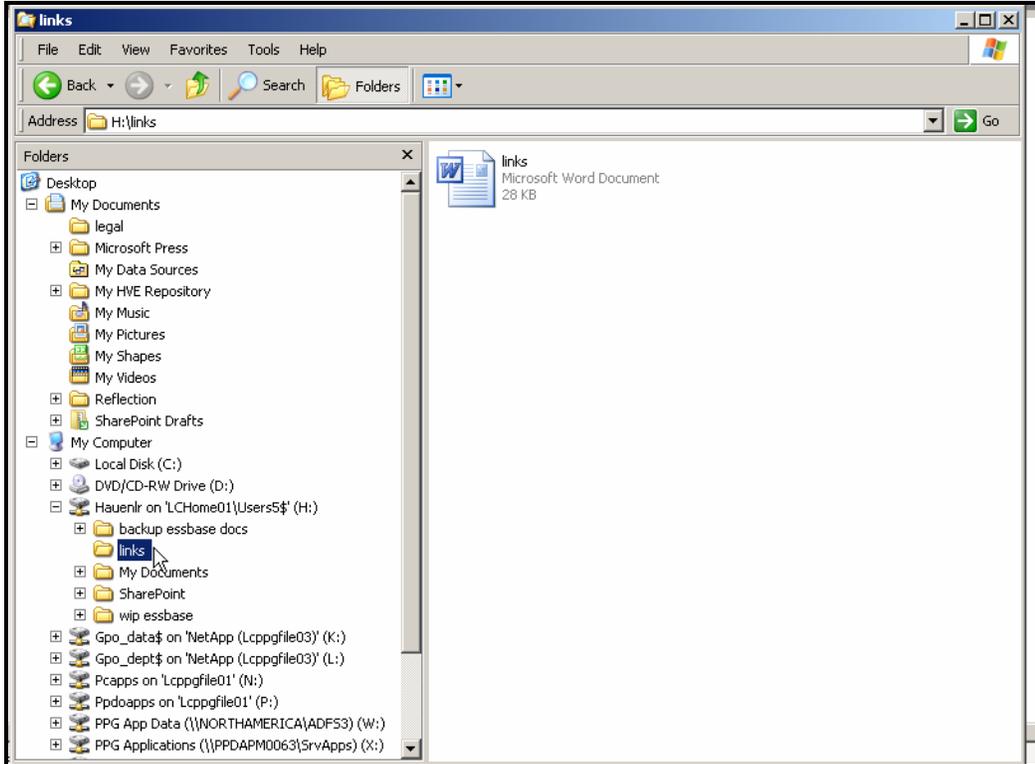


- Open a separate instance of **Windows Explorer** (Programs->Accessories -> Windows Explorer)

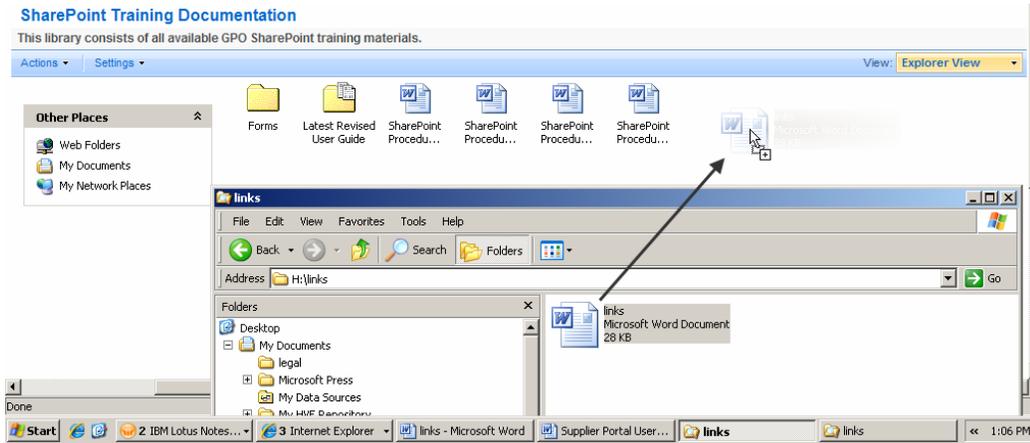




- Navigate to the desired location for either uploading a file to the SharePoint directory or downloading a file from the SharePoint directory. In this example, upload the file **link.doc** to the SharePoint directory.



- The file can be uploaded by:
 - Dragging and dropping as illustrated below.
 - Copy and paste
 - Cut and paste
- The user must have the proper permissions to move files to or from SharePoint. If the user does not have permissions, then there will be an error displayed when a file is trying to be moved.





2.18. Work Flows

2.18.1. What is a Work Flow

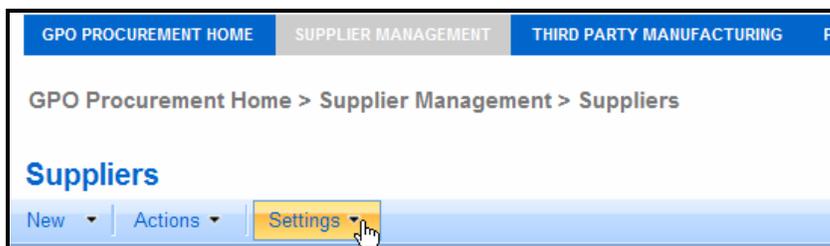
- Set of steps applied to a library or list to make sure that it follows the company business processes
- Controls how items in a library/list are released to appropriate personnel for disposition or review.
- Automated (or manual) mechanism in place to make sure that the process flows as specified
- Alerts personnel that there is a task to be performed

2.18.2. General Work Flow Process – Setting Parameters

- Work Flows must be enabled for the process
- Work Flows are generally either **Approval** or **Collect Data** Work Flows
- Approvers must be determined for each **Approval** step
- Assign tasks so users can be alerted to a pending task
- Set a due date which triggers a reminder email
- Set **Notify Others** so they can review the on-going work flow status

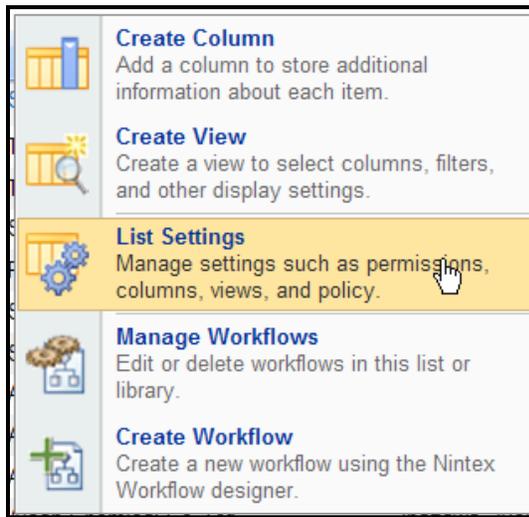
Note: The following sample screen shots are for informational purposes only. The Business Administrator develops the work flow for the specific processes.

- Set general workflow parameters
- Select the required library or list





- Go to List Settings



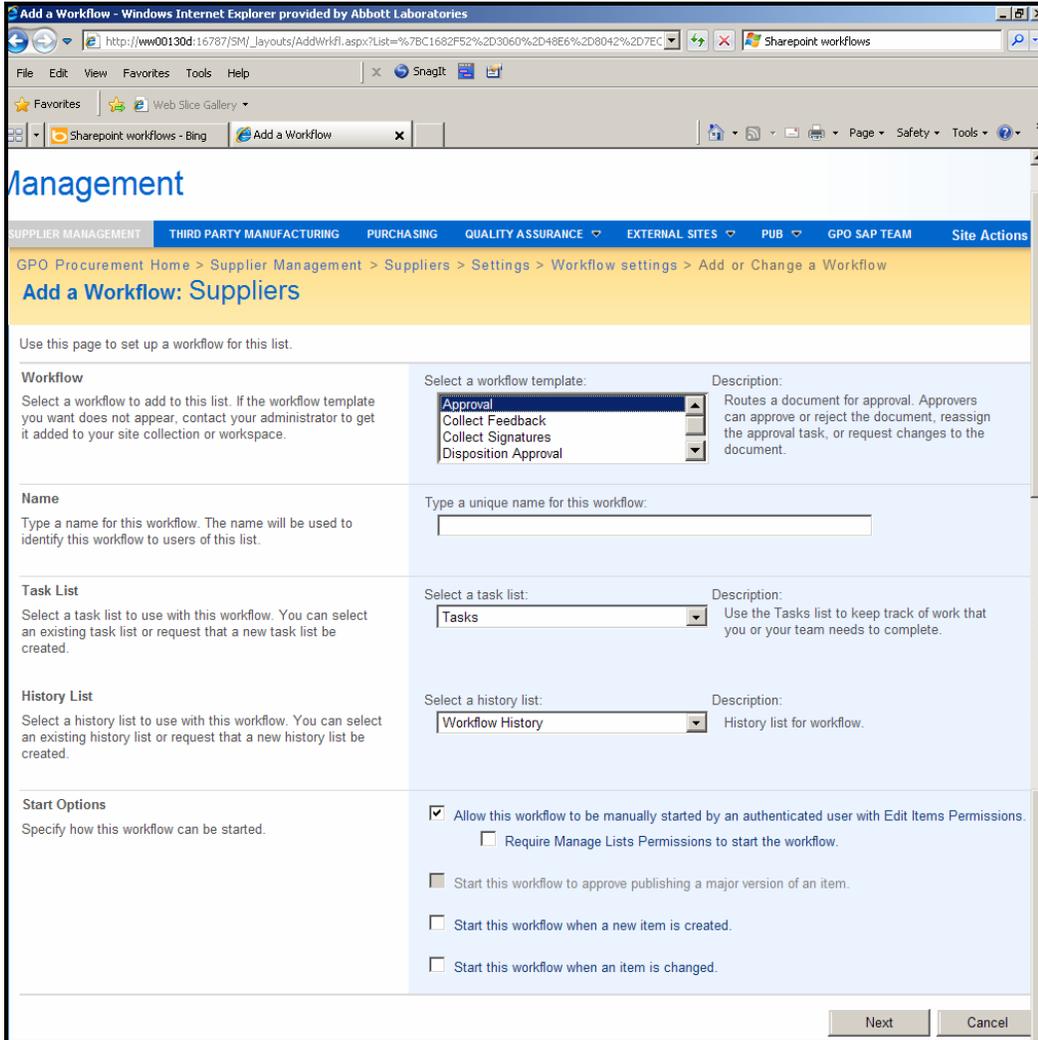
- Select Workflow settings



- Select the parameters for the workflow



- Workflow template
- Workflow name
- Select the task list
- Select a history list
- Select start options (workflows can be started manually or automatically)



- The **Next** page includes additional parameters as shown below.



Customize Workflow: Hospira

OK Cancel

Workflow Tasks
Specify how tasks are routed to participants and whether to allow tasks to be delegated or if participants can request changes be made to the document prior to finishing their tasks.

Assign tasks to:
 All participants simultaneously (parallel)
 One participant at a time (serial)

Allow workflow participants to:
 Reassign the task to another person
 Request a change before completing the task

Default Workflow Start Values
Specify the default values that this workflow will use when it is started. You can opt to allow the person who starts the workflow to change or add participants.

Type the names of people you want to participate when this workflow is started. Add names in the order in which you want the tasks assigned (for serial workflows).

Approvers

Assign a single task to each group entered (Do not expand groups).
 Allow changes to the participant list when this workflow is started

Type a message to include with your request:

Due Date
If a due date is specified and e-mail is enabled on the server, participants will receive a reminder on that date if their task is not finished.

Tasks are due by (parallel):

Give each person the following amount of time to finish their task (serial):

Days(s)

Notify Others
To notify other people when this workflow starts without assigning tasks, type names on the CC line.

CC

Complete the Workflow
Specify when you want the workflow to be completed. If you do not select any options, the workflow will be completed when all tasks are finished.

Complete this workflow when:
 Following number of tasks are finished:

Cancel this workflow when the:
 Document is rejected
 Document is changed

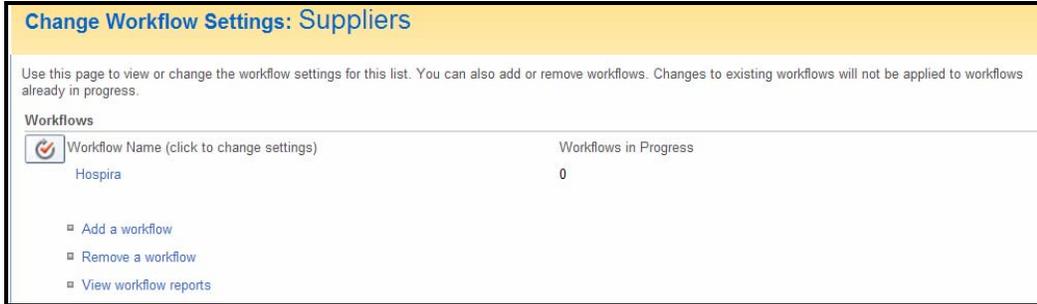
Post-completion Workflow Activities
Specify the actions you want to occur after the workflow has been successfully completed.

After the workflow is completed:
 Update the approval status (use this workflow to control content approval)

OK Cancel

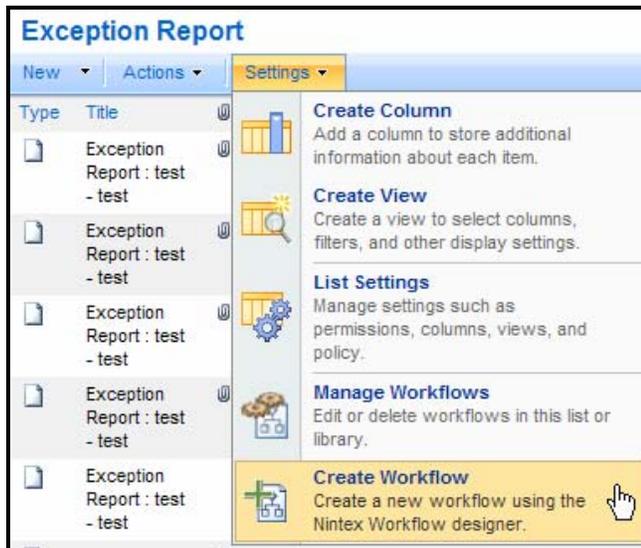


- The following screen allows the user to view the workflow settings. ONLY the business administrator (or IT administrator) can make changes to a workflow.



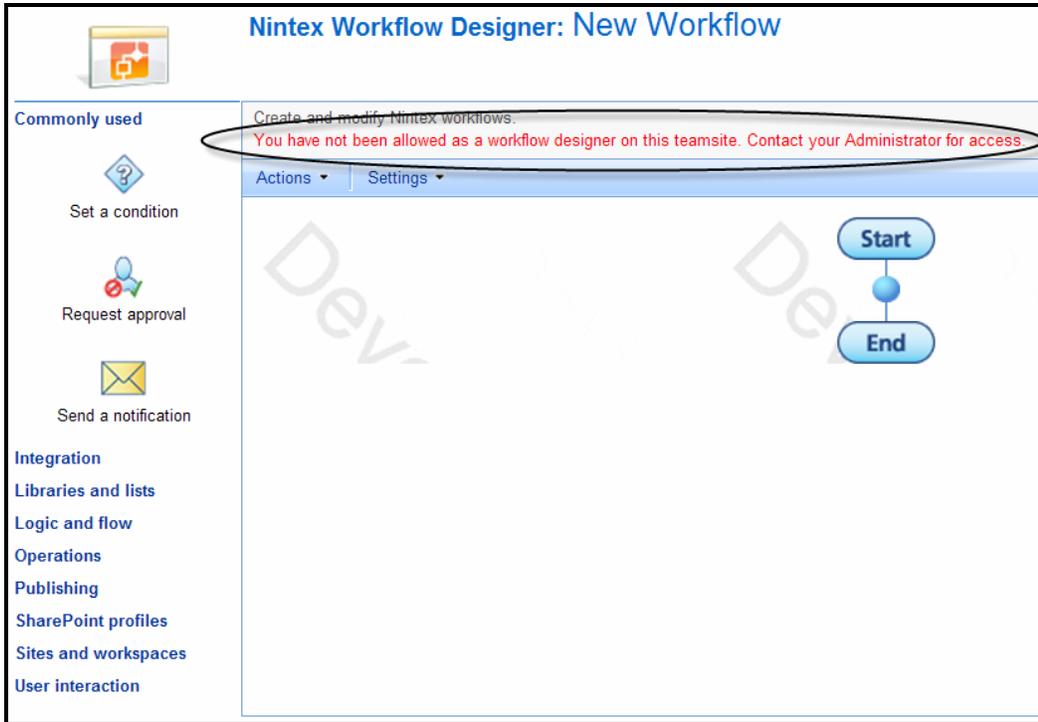
2.18.3. General Work Flow Process – Creating a Workflow

- ONLY the business administrator or IT administrator can modify or create a workflow.





- If the user is NOT authorized to create or modify a workflow, the following screen appears.





- If the user is authorized, the workflow creator appears.
- The details for creating a SharePoint workflow is not discussed in this guide.

Select a workflow template

Blank

Business Management / Finance

Human Resources

Operations and IT

Project Tracking / Product Management

Sales / Marketing

Project Budget Approval

Project Issue Escalation

Project Team Site

Blank

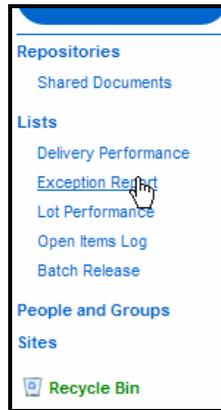
Design a new workflow from a blank page. Alternatively, select a template from one of the categories.

Show template page when creating a new workflow

Create Cancel



2.18.4. Tracking Work Flow Status



- The Exception Report pages shows the history and status of all active Exception Reports.

Exception Report							
New Actions Settings							
Type	Title	TPM Tracking Number	High Impact	Date of Event	Date of Notification	Date 1st Draft Rec'd by TPM QA	
	Exception Report : test - test	test	No	1/24/2011	1/24/2011	1/24/2011	

Date Approved by TPM QA	Comments	Notification Time	Notification in Timely Manner?	Routing Time	Draft Rec'd less than 30 days
	testq	0	Yes	Routing	Yes

Routing less than 30 days?	Edit	Status	Link	ID	TPMID	Exception Report Approval	Lot Numbers
Routing		Submitted	View/Update	164	USPRTPM001	Failed on Start (retrying)	test



View: All Items						
Short Description	List Number	Incident Type	TPM Name	TPM	TPM Location	TPM Region
test	4505	Expired materials	test12345	test12345 - test	test	Biologics

- The following screens display the running status of the workflow for the specified business process.

Exception Report: Exception Report : TPM9807 Close

[New Item](#) | [Edit Item](#) | [Delete Item](#) | [Manage Permissions](#) | [Workflows](#) | [Alert Me](#) | [Version History](#) | [Workflow History](#)

TPM Tracking Number	Vinda1
High Impact	Yes
Date of Event	1/24/2011
Date of Notification	1/25/2011
Date 1st Draft Rec'd by TPM QA	1/25/2011

Workflow Status

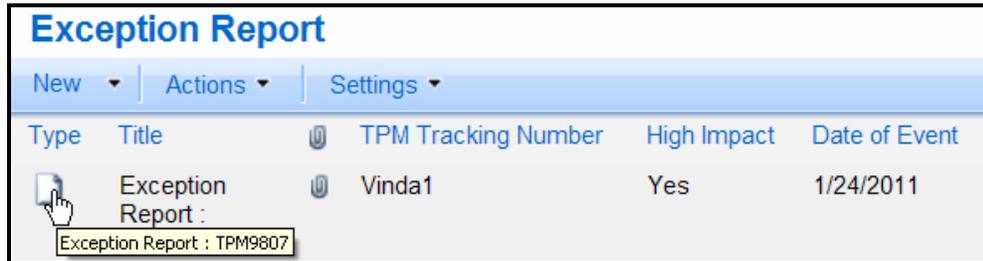
Nintex workflows that are running for this list item.

Running Workflows			
Name	Started by	Started	Idle time
Exception Report Approval	Hauenstein, Rick R	2/23/2011 4:18 PM	1 day 22 hours 45 minutes
Exception Report Approval	Thikkavarapu, Sundeep R	1/25/2011 9:55 AM	31 days 4 hours 52 minutes
Completed Workflows			
Name	Started by	Started	Completed
Cancelled & Errored Workflows			
Name	Started by	Started	Ended



2.18.5. Reviewing Work Flows

- All workflows can be reviewed using the procedure below. Any library or list that has a workflow can be checked.
- Select the document or other item as appropriate.



- From the document or item screen, select **Workflow**



- The Workflows reporting screen appears. In the section titled **Running Workflows**, check the current status.
- There may be multiple versions listed. Select the current version – the one shown first in the list.



Workflows: Exception Report : TPM9807

Use this page to start a new workflow on the current item or to view the status of a running or completed workflow.

Start a New Workflow

There are no workflows currently available to start on this item.

Workflows

Select a workflow for more details on the current status or history.

Name	Started	Ended	Status
Running Workflows			
Exception Report Approval	2/23/2011 4:16 PM		In Progress
Exception Report Approval (Previous Version: 1/23/2011 3:05:21 PM)	1/25/2011 9:55 AM		In Progress
Completed Workflows			
There are no completed workflows on this item.			

- The Workflow Status screen give more details about the current (or past) status of the workflow.

Workflow Status: Exception Report Approval

Workflow Information

Initiator:	Hauenstein, Rick R	Item:	Exception Report : TPM9807
Started:	2/23/2011 4:16 PM	Status:	In Progress
Last run:	2/23/2011 4:18 PM		

If an error occurs or this workflow stops responding, it can be terminated. Terminating the workflow will set its status to Canceled and will delete all tasks created by the workflow.
 Terminate this workflow now.

Tasks

The following tasks have been assigned to the participants in this workflow. Click a task to edit it. You can also view these tasks in the list [Workflow Tasks](#).

Assigned To	Title	Due Date	Status	Outcome
Thikkavarapu, Sundeep R	Exception - Rejina		Not Started	Pending

Workflow History

[View workflow reports](#)

The following events have occurred in this workflow.

Date Occurred	Event Type	User ID	Description	Outcome
There are no items to show in this view of the "NintexWorkflowHistory" list. To create a new item, click "New" above.				



Exception Report - View Workflow Reports

Use these reports to monitor how your business processes are running based on the history information of those workflows.

[Go Back to Exception Report](#)

Exception Report Approval

- Activity Duration Report**
Use this report to see how long it is taking for each activity within this workflow to complete, as well as how long it takes each instance to complete.
- Cancellation & Error Report**
Use this report to see which workflows are being canceled or encounter errors before completion.

Exception Report Approval (Previous Version:1/23/2011 3:05:21 PM)

- Activity Duration Report**
Use this report to see how long it is taking for each activity within this workflow to complete, as well as how long it takes each instance to complete.
- Cancellation & Error Report**
Use this report to see which workflows are being canceled or encounter errors before completion.

Exception Report: Exception Report : TPM9807 Close

[New Item](#) | [Edit Item](#) | [Delete Item](#) | [Manage Permissions](#) | [Workflows](#) | [Alert Me](#) | [Version History](#) | [Workflow History](#)

TPM Tracking Number	Vinda1
High Impact	Yes
Date of Event	1/24/2011
Date of Notification	1/25/2011
Date 1st Draft Rec'd by TPM QA	1/25/2011



Workflow Status

Nintex workflows that are running for this list item.

Running Workflows			
Name	Started by	Started	Idle time
Exception Report Approval	Hauenstein, Rick R	2/23/2011 4:18 PM	1 day 22 hours 45 minutes
Exception Report Approval	Thikkavarapu, Sundeep R	1/25/2011 9:55 AM	31 days 4 hours 52 minutes

Completed Workflows			
Name	Started by	Started	Completed

Cancelled & Errored Workflows			
Name	Started by	Started	Ended

View statistics

Workflow Information

Item: Exception Report : TPM9807

Workflow: Exception Report Approval

Initiator: Hauenstein, Rick R

Started: 2/23/2011 4:18 PM

Status: Running 2/23/2011 4:18 PM
[Click here to show detail view](#)



Detailed history of this workflow.

Show graphical view

Action History

Action	Start	End	Duration
Primary QA Approval Reminder	2/23/2011 4:18 PM	incomplete	
Primary QA Approval	2/23/2011 4:18 PM	incomplete	
Primary QA Approval with Reminder	2/23/2011 4:18 PM	incomplete	
Clear Primary Attachment	2/23/2011 4:18 PM	2/23/2011 4:18 PM	0 minutes
Go to Primary QA	2/23/2011 4:18 PM	2/23/2011 4:18 PM	0 minutes
Draft Submitted / Exception Re-Submitted	2/23/2011 4:18 PM	2/23/2011 4:18 PM	0 minutes
Next Stage	2/23/2011 4:18 PM	2/23/2011 4:18 PM	0 minutes
Draft Attached ?	2/23/2011 4:18 PM	2/23/2011 4:18 PM	0 minutes
Primary Approver Found ?	2/23/2011 4:18 PM	2/23/2011 4:18 PM	0 minutes
Get Primary Approver	2/23/2011 4:18 PM	2/23/2011 4:18 PM	0 minutes
Exception Report Approval	2/23/2011 4:18 PM	incomplete	
Build Update Link for External	2/23/2011 4:18 PM	2/23/2011 4:18 PM	0 minutes
Set Link	2/23/2011 4:18 PM	2/23/2011 4:18 PM	0 minutes
Build Update Link for External	2/23/2011 4:18 PM	2/23/2011 4:18 PM	0 minutes
Run if	2/23/2011 4:18 PM	incomplete	

Task History

Task: Primary QA Approval. Started at: 2/23/2011 4:18 PM

User	Assigned Time	Completed Time	Outcome	Comments
Thikkavarapu, Sundeeep R	2/23/2011 4:18 PM	incomplete	Pending	

Workflow Messages

- Click on **Show graphical view** to return to the workflow process diagram



3. GPO PROCUREMENT

3.1. Content Specific Details



4. SUPPLIER MANAGEMENT

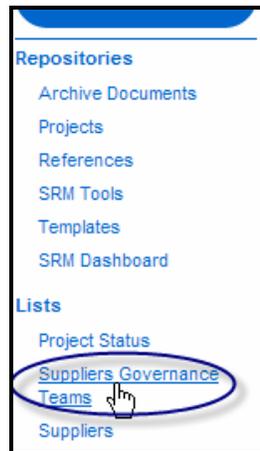
4.1. SRM Suppliers and Governance Teams

4.1.1. View SRM Suppliers Governance Teams

- On the Navigation Bar, select **Supplier Management**



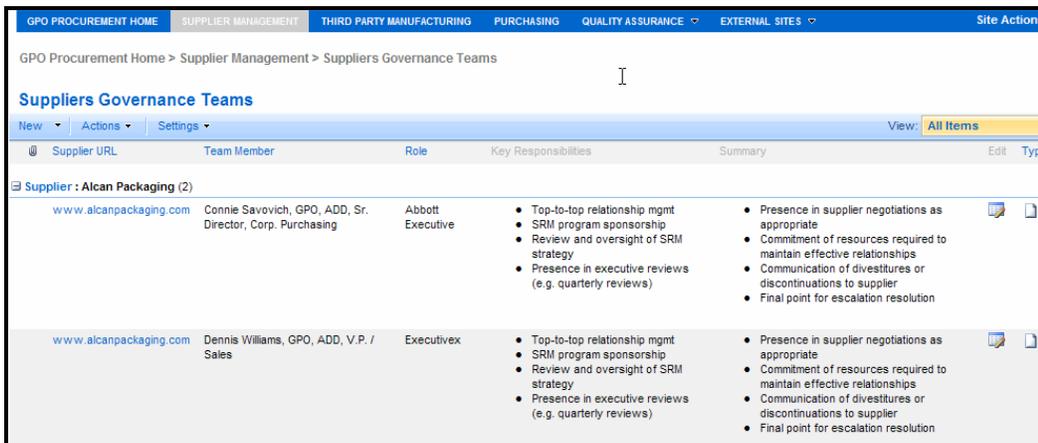
- In the Quick Launch area, select **Suppliers Governance Teams**



- The **Supplier Governance Teams** page is displayed showing the current Suppliers



- Expand the desired Supplier for details.



- This page includes:
 - Supplier name
 - Supplier URL
 - Team Member
 - Role
 - Key Responsibilities
 - Summary

4.1.2. Add to Suppliers Governance Teams

- From the **Suppliers Governance Teams** page shown above, select **New Item**



- The Suppliers Governance Teams : New Item page is displayed.

Suppliers Governance Teams: New Item

OK Cancel

Attach File | Spelling... * indicates a required field

Supplier * Alcan Packaging

Supplier URL * www.alcanpackaging.com

Role Abbott Executive

Key Responsibilities

- Top-to-top relationship mgmt
- SRM program sponsorship
- Review and oversight of SRM strategy
- Presence in executive reviews (e.g. quarterly reviews)

Summary

- Presence in supplier negotiations as appropriate
- Commitment of resources required to maintain effective relationships
- Communication of divestitures or discontinuations to supplier
- Final point for escalation resolution

Team Member Connie Savovich, GPO, ADD, Sr. Director, Corp. Purchasing

Created at 10/15/2010 2:20 AM by Thikkavarapu, Sundeep R
Last modified at 11/16/2010 11:03 AM by Thikkavarapu, Sundeep R

OK Cancel

- Complete the form. Only two items are mandatory:
 - **Supplier**
 - **Supplier URL**
- Click **OK** when the page is completed.



4.1.3. Edit Suppliers Governance Teams

- Expand the supplier in order to view the details. Refer to Section 4.1.1 above.
- Select **Edit** next to the appropriate area to be edited (see illustration below).

Suppliers Governance Teams					
Actions		Settings		View: All Items	
Supplier URL	Team Member	Role	Key Responsibilities	Summary	Edit Type
Supplier: Alcan Packaging (2)					
www.alcanpackaging.com	Connie Savovich, GPO, ADD, Sr. Director, Corp. Purchasing	Abbott Executive	<ul style="list-style-type: none"> • Top-to-top relationship mgmt • SRM program sponsorship • Review and oversight of SRM strategy • Presence in executive reviews (e.g. quarterly reviews) 	<ul style="list-style-type: none"> • Presence in supplier negotiations as appropriate • Commitment of resources required to maintain effective relationships • Communication of divestitures or discontinuations to supplier • Final point for escalation resolution 	
www.alcanpackaging.com	Dennis Williams, GPO, ADD, V.P. / Sales	Executivex	<ul style="list-style-type: none"> • Top-to-top relationship mgmt • SRM program sponsorship • Review and oversight of SRM strategy • Presence in executive reviews (e.g. quarterly reviews) 	<ul style="list-style-type: none"> • Presence in supplier negotiations as appropriate • Commitment of resources required to maintain effective relationships • Communication of divestitures or discontinuations to supplier • Final point for escalation resolution 	

- The **Suppliers Governance Teams** edit window is displayed.

Suppliers Governance Teams: www.alcanpackaging.com

OK Cancel

Attach File Delete Item Spelling... * indicates a required field

Supplier *

Supplier URL *

Role

Key Responsibilities

- Top-to-top relationship mgmt
- SRM program sponsorship
- Review and oversight of SRM strategy
- Presence in executive reviews (e.g. quarterly reviews)

Summary

- Presence in supplier negotiations as appropriate
- Commitment of resources required to maintain effective relationships
- Communication of divestitures or discontinuations to supplier
- Final point for escalation resolution

Team Member

- Make all changes from this screen.



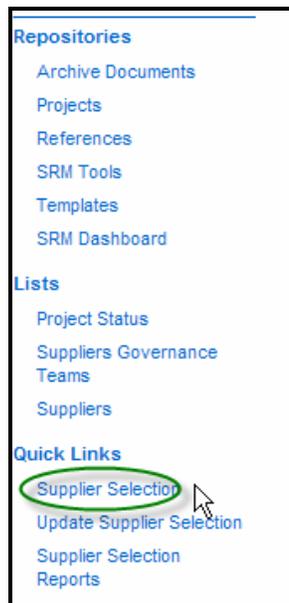
- Click **OK** when completed.

4.2. Supplier Selection Tool

- Click on the Supplier Management Link



- Click on the **Supplier Selection** link in the Quick Launch area



- The **Supplier Selection Tool** page is displayed.



Supplier Selection Tool

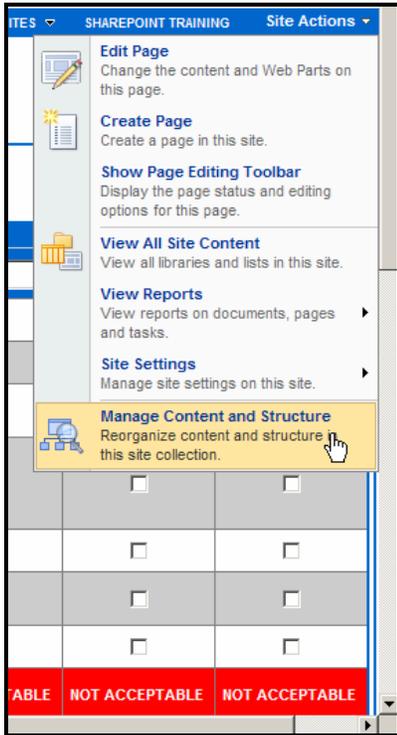
Material: Date: 1/28/2011 Project Name:

Must Have Criteria		(Please enter supplier names in the textboxes below!)						
Category	Criteria	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Quality	Quality Manual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality	Material Specification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial	Financial Stability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Results of Must Have Criteria:	NOT ACCEPTABLE	NOT ACCEPTABLE	NOT ACCEPTABLE	NOT ACCEPTABLE	NOT ACCEPTABLE	NOT ACCEPTABLE	NOT ACCEPTABLE
Scored Criteria								
Social Responsibility	Global Citizenship	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>
Service	Delivers / Agrees to Deliver per Class A	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>
Financial	test criteria added by Dhanya	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>
	Comments:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

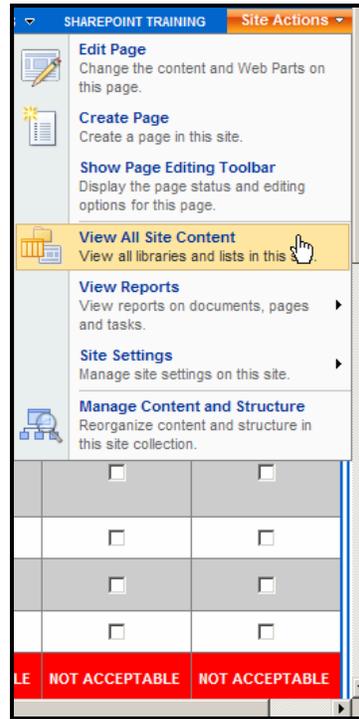
- This screen is divided into several sections. Modifications to each section are described below. These sections consist of:
 - **Category**
 - **Criteria**
 - **Must Have Criteria**
 - **Scored Criteria**
- The addition/modification feature is reserved ONLY for the Business Administrators.

4.2.1. Add/Modify a new Category

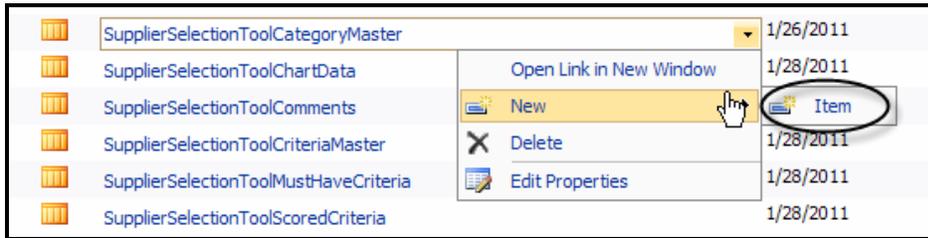
- On the Supplier Management site, click **Manage Content and Structure** in the **Site Actions** drop down menu. Or **View All Site Content**, also on the **Site Actions** drop-down menu.



or



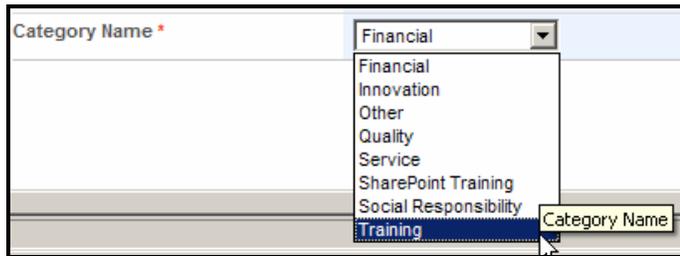
- Click the SupplierSelectionToolCategoryMaster link.
- Click the down arrow on the **SupplierSelectionToolCategoryMaster** link. Select **New** and **Item**



- This opens the SupplierSelectionToolCategoryMaster: New Item page.



- Specify the desired name for the **CategoryName** field. For this example, **Training** is the new category.
- If calculation is required, specify the desired % in the **Weightage** field, otherwise, leave the field blank.
- Click **OK**.
- This added a new category to the **Supplier Selection Tool**. However, before there is any visible change to the **Supplier Selection Tool**, a criteria has to be created for that particular category.
- The new category, **Training**, now appears on all category drop-down menus.



- All categories are displayed by clicking on the **SupplierToolSelectionCategoryMaster** link.



SupplierSelectionToolCategoryMaster - All Items

Up New Actions Settings Show Related Resources View: All Items

Attachments	CategoryName	Weightage
<input type="checkbox"/> False	Quality	30 %
<input type="checkbox"/> False	Service	30 %
<input type="checkbox"/> False	Financial	30 %
<input type="checkbox"/> False	Innovation	5 %
<input type="checkbox"/> False	Social Responsibility	2 %
<input type="checkbox"/> False	Other	3 %
<input type="checkbox"/> False	SharePoint Training	10 %
<input type="checkbox"/> False	Training ← New category just created.	30 %

- To edit or delete a category, go to the **SupplierSelectionToolCategoryMaster** link. Hover the pointer over the required category and click on the down arrow.

SupplierSelectionToolCategoryMaster - All Items

Up New Actions Settings Show Related Resources View: All Items

Attachments	CategoryName	Weightage
<input type="checkbox"/> False	Quality	30 %
<input type="checkbox"/> False	Service	30 %
<input type="checkbox"/> False	Financial	30 %
<input type="checkbox"/> False	Innovation	5 %
<input type="checkbox"/> False	Social Responsibility	2 %
<input type="checkbox"/> False	Other	3 %
<input type="checkbox"/> False	SharePoint Training	10 %
<input type="checkbox"/> False	Training	30 %

Context menu for 'Training' category:

- Open Link in New Window
- Delete
- Copy...
- Move...
- View Properties
- Edit Properties** (highlighted)
- Manage Permissions
- Version History



- Double-clicking the required category also displays the edit window.

SupplierSelectionToolCategoryMaster: **Training** Close

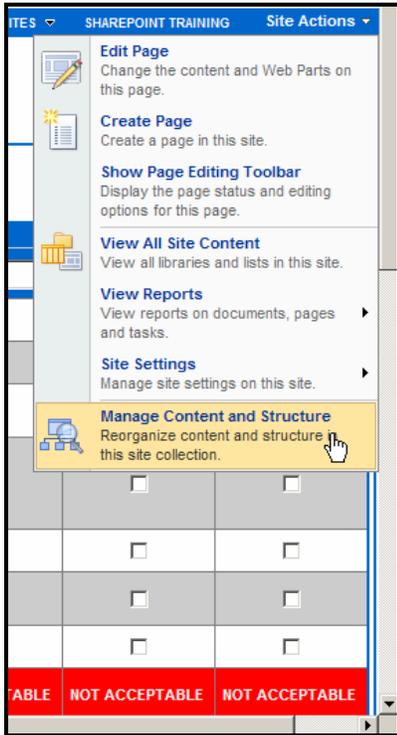
[New Item](#) | [Edit Item](#) | [Delete Item](#) | [Manage Permissions](#) | [Alert Me](#) | [Workflow History](#)

CategoryName	Training
Weightage	30%

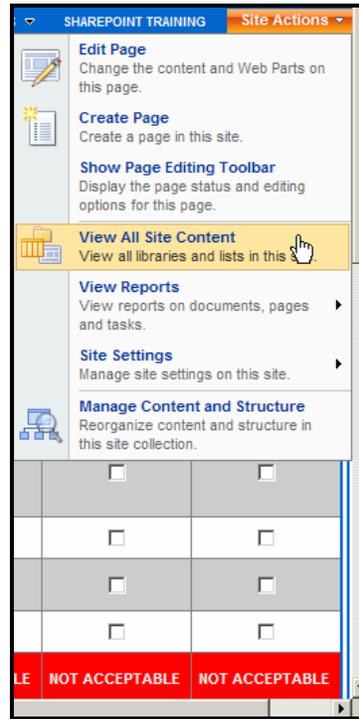
Created at 1/28/2011 1:07 PM by [Hauenstein, Rick R](#) Close
Last modified at 1/28/2011 1:07 PM by [Hauenstein, Rick R](#)

4.2.2. Add/Modify a new Criteria

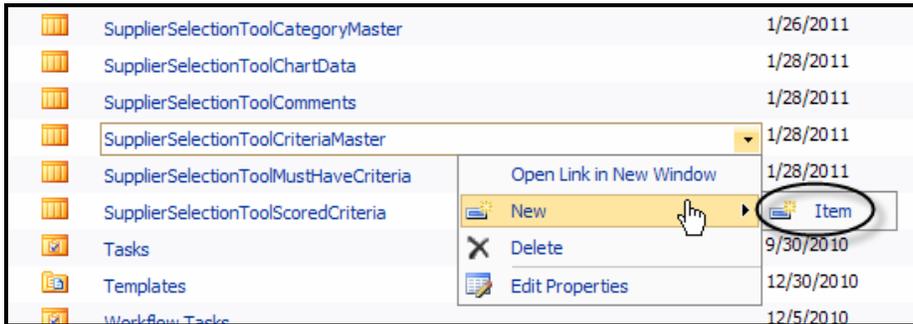
- On the Supplier Management site, click **Manage Content and Structure** in the **Site Actions** drop down menu. Or **View All Site Content**, also on the **Site Actions** drop-down menu.



or



- Click the `SupplierSelectionToolCriteriaMaster` link.
- Click the down arrow on the `SupplierSelectionToolCriteriaMaster` link. Select **New** and **Item**





- This opens the SupplierSelectionToolCriteriaMaster: New Item page.

SupplierSelectionToolCriteriaMaster: **New Item**

Attach File | Spelling... * indicates a required field

criteria Name * SharePoint CBT

Weightage %

Rate1

Rate2

Rate3

MustHave

Category Name * Training

- Financial
- Innovation
- Other
- Quality
- Service
- SharePoint Training
- Social Responsibility
- Training

OK Cancel

- The new criteria name is **SharePoint CBT**. Note that it will be associated with the newly created category, **Training**.
- Specify the desired information for the new list item. Note: Leave **Weightage**, **Rate1**, **Rate2** and **Rate3** field blank.
- **MustHave** is optional
 - If the **MustHave** box is checked, then this criteria appears in the Must Have section of the Supplier Selection Tool.



SupplierSelectionToolCriteriaMaster: **New Item**

Attach File | Spelling... * indicates a required field

criteria Name * SharePoint CBT

Weightage %

Rate1

Rate2

Rate3

MustHave

Category Name * Training

- Financial
- Innovation
- Other
- Quality
- Service
- SharePoint Training
- Social Responsibility
- Training

OK Cancel

- If the **MustHave** box is not checked, the criteria will appear in the Scored Criteria of the Supplier Selection Tool.



SupplierSelectionToolCriteriaMaster: **SharePoint User Guide**

OK Cancel

Attach File | Delete Item | Spelling... * indicates a required field

criteria Name * SharePoint User Guide

Weightage 35 %

Rate1 5

Rate2 3

Rate3 1

MustHave

Category Name * Training

Created at 1/31/2011 3:46 AM by System
Last modified at 2/17/2011 2:47 PM by Liu

Financial
Innovation
Other
Quality
Service
SharePoint Training
Social Responsibility
Training

OK Cancel

- Click **OK**.
- SharePoint CBT/Training is in the Must Have Criteria section of the Supplier Selection Tool
- SharePoint User's Guide/Training is in the Scored Criteria section (MustHave was deselected) of the Supplier Selection Tool.
- **Rate1**, **Rate2**, and **Rate3** must be filled in so these ratings can be applied to the Scored Criteria in the pull-down menu. **Rate3** is the default value.

	Results of Must Have Criteria:	NOT ACCEPTABLE	NOT ACCEPTABLE
Scored Criteria			
Training	SharePoint User Guide	1	1
Social Responsibility	Global Citizenship	5 3 1	1



Supplier Selection Tool

Material: Date: 1/28/2011 Project Name:

Must Have Criteria (Please enter supplier names in the textboxes below!)

| Category | Criteria | <input type="text"/> |
|--------------------------------|----------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Training | SharePoint CBT | <input type="checkbox"/> |
| Quality | Quality Manual | <input type="checkbox"/> |
| Results of Must Have Criteria: | | NOT ACCEPTABLE |

Scored Criteria

Category	Criteria	<input type="text"/>						
Training	SharePoint User's Guide	0	0	0	0	0	0	0
Social Responsibility	Global Citizenship	1	1	1	1	1	1	1
Service	Delivers / Agrees to Deliver per Class A	1	1	1	1	1	1	1
Financial	test criteria added by Dhanya	1	1	1	1	1	1	1
	Comments:	<input type="text"/>						



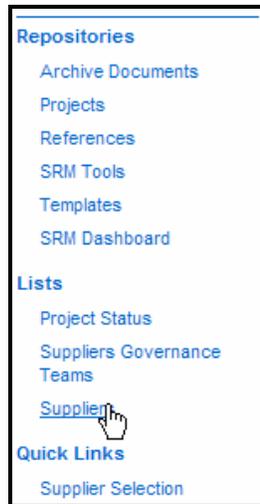
5. SUPPLIER COLLABORATION

5.1. Create New Supplier

- Select **Supplier Management** from the site bar.



- Select **Suppliers** from the Quick Launch area.



- To add a new supplier, select **New**, and then **Supplier**. This opens the New Supplier page.



Suppliers					
New	Actions	Settings	Supplier Location	Supplier Region	Supplier URL
Supplier Create a new Supplier			Test Location1	USPR	Test Supplier1 - Test Location1
LACSU0001	TEST12		TEST12	LAC	TEST12 - TEST12
SUPP4576	Sudheer		LA	EU	Sudheer - LA
SUPP0889	Rejina		Woodstock	LAC	Rejina - Woodstock
NancyID	Supplier Nancy		LC	USPR	Supplier Nancy - LC

- Fill out the Suppliers: New Item form

Suppliers: New Item

OK Cancel

Attach File | Delete Item | Spelling... * indicates a required field

Supplier ID * SP0001

Supplier Name * SharePoint

Supplier Location * Lake County

Supplier Region * USPR

Create Site

Created at 1/25/2011 2:00 PM by
Last modified at 1/25/2011 2:00 PM by

OK Cancel

- The **Supplier Region** must be chosen from one of the items in the drop-down menu. If a region is not listed, notify the business administrator.





- The **Create Site** box must be checked if the supplier wants a workspace. Otherwise, the workspace is optional and can be added later. Refer to **Section 5.1.1 Edit an Existing Supplier**.
- A supplier workspace can include, but not limited to, the following
 - Documents
 - Calendar
 - New Open Items
 - Add an Open Item
 - Open Items Log
 - Change Notification

5.1.1. Edit an Existing Supplier

- Go to **Supplier Management** on the site bar.
- Select **Suppliers** on the Quick Launch area. This opens the **Suppliers** page.

Supplier ID	Supplier Name	Supplier Location	Supplier Region	Supplier URL	Edit
USPRS0001	Test Supplier1	Test Location1	USPR	Test Supplier1 - Test Location1	
LACSU0001	TEST12	TEST12	LAC	TEST12 - TEST12	
SUPP4576	Sudheer	LA	EU	Sudheer - LA	
SUPP0889	Rejna	Woodstock	LAC	Rejna - Woodstock	
NancyID	Supplier Nancy	LC	USPR	Supplier Nancy - LC	
SP0001	SharePoint	Lake County	USPR	SharePoint - Lake County	

- Click on the **Edit icon** for the required supplier. For this example, the supplier just created (**SharePoint**) is the supplier to edit.

Supplier ID	Supplier Name	Supplier Location	Supplier Region	Supplier URL	Edit
USPRS0001	Test Supplier1	Test Location1	USPR	Test Supplier1 - Test Location1	
LACSU0001	TEST12	TEST12	LAC	TEST12 - TEST12	
SUPP4576	Sudheer	LA	EU	Sudheer - LA	
SUPP0889	Rejna	Woodstock	LAC	Rejna - Woodstock	
NancyID	Supplier Nancy	LC	USPR	Supplier Nancy - LC	
SP0001	SharePoint	Lake County	USPR	SharePoint - Lake County	
USPRS0039	Airgas Inc	Bozrah, CT, USA	USPR	Airgas Inc - Bozrah, CT, USA	

- This opens the Suppliers: SharePoint – Lake County page.



Suppliers: **SharePoint - Lake County**

OK Cancel

Attach File | Delete Item | Spelling... * indicates a required field

Supplier ID *

Supplier Name *

Supplier Location *

Supplier Region *

Create Site

Created at 1/25/2011 2:00 PM by
Last modified at 1/25/2011 2:00 PM by

OK Cancel

- Make the appropriate edits. Some of the common edits from this page are:
 - the supplier site can be created if the **Create Site** was not originally checked
 - the supplier site can be omitted by deselecting the **Create Site** checkbox.
 - New attachments can be added or removed
 - The supplier can be deleted.

5.1.2. View the Supplier Site

- Go to **Supplier Management** on the site bar.
- Select **Suppliers** on the Quick Launch area. This opens the **Suppliers** page.

Suppliers

New Actions Settings View: All Items

Supplier ID	Supplier Name	Supplier Location	Supplier Region	Supplier URL	Edit
USPRSU0001	Test Supplier1	Test Location1	USPR	Test Supplier1 - Test Location1	
LACSU0001	TEST12	TEST12	LAC	TEST12 - TEST12	
SUPP4576	Sudheer	LA	EU	Sudheer - LA	
SUPP0889	Rejna	Woodstock	LAC	Rejna - Woodstock	
NancyID	Supplier Nancy	LC	USPR	Supplier Nancy - LC	
SP0001	SharePoint	Lake County	USPR	SharePoint - Lake County	

- The **Supplier URL** is automatically created when the supplier was added. This is the link to the supplier’s workspace. Click on the URL as shown in the example below:



Suppliers				
Supplier ID	Supplier Name	Supplier Location	Supplier Region	Supplier URL
USPRSU0001	Test Supplier1	Test Location1	USPR	Test Supplier1 - Test Location1
LACSU0001	TEST12	TEST12	LAC	TEST12 - TEST12
SUPP4576	Sudheer	LA	EU	Sudheer - LA
SUPP0889	Rejina	Woodstock	LAC	Rejina - Woodstock
NancyID	Supplier Nancy	LC	USPR	Supplier Nancy - LC
SP0001	SharePoint	Lake County	USPR	SharePoint - Lake County
USPRSU0020	Airaga Inc	Branth, CT, USA	USPR	Airaga Inc - Branth, CT, USA

- This opens the supplier’s workspace.
- The page is initially empty. Use the procedures in **Section 2.6 Web Parts** to add the required content for this supplier.

The screenshot shows the SharePoint interface for 'SharePoint - Lake County'. The main content area is empty, labeled 'Workspace for SharePoint - Lake County'. On the right, there is a 'Site Actions' menu with the following options:

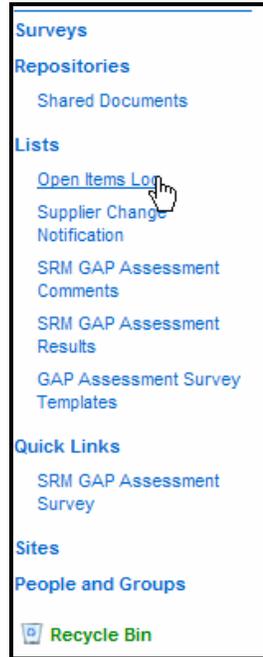
- Create Page**: Create a page in this site.
- Edit Page**: Add, remove, or update Web Parts on this page.
- View All Site Content**: View all libraries and lists in this site.
- View Reports**: View reports on documents, pages and tasks.
- Site Settings**: Manage site settings on this site.
- Manage Content and Structure**: Reorganize content and structure in this site collection.

5.2. SRM Open Item Log

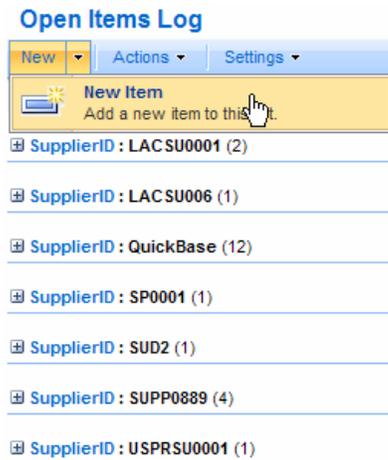
- Go to the Supplier Collaboration under the External Sites menu item.

The screenshot shows the top navigation bar with the following items: GPO PROCUREMENT HOME, SUPPLIER MANAGEMENT, THIRD PARTY MANUFACTURING, PURCHASING, QUALITY ASSURANCE, and EXTERNAL SITES. The 'EXTERNAL SITES' dropdown is open, showing 'SUPPLIER COLLABORATION' (highlighted) and 'TPM COLLABORATION'.

- Select **Open Items Log** from the Quick Launch area.

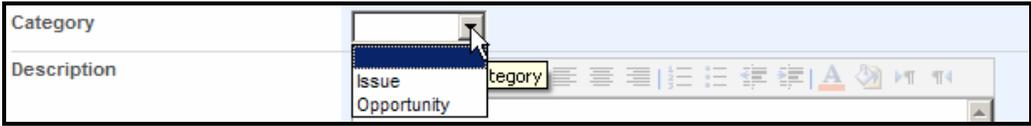


- In the **Open Items Log** screen, select **New**, and **New Item** as shown.

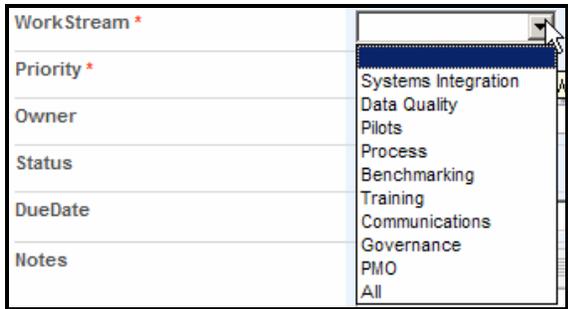




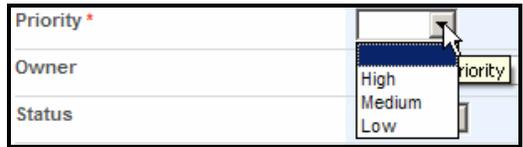
- o SupplierID (Required)
- o Supplier name
- o Supplier Location
- o Supplier Region
- o Open Item (Required)
- o Category – no default value.



- o Description
- o WorkStream (Required) – no default value.



- o Priority (Required) – no default value.



- o Owner – Click on the Browse icon to search the employee database.



- o Status – The default Value is **Open**.



Status	Open
DueDate	
Notes	

- o DueDate – Click on the calendar icon to select a date.

DueDate	<input type="text" value=""/>
Notes	
DateLogged *	<input type="text" value=""/>

- o Notes
- o Date Logged (Required) – Defaults to today's date. It can be changed by clicking on the calendar icon and selecting another date.

DateLogged *	2/17/2011
--------------	-----------

- Sample Open Item Log
 - o ***New Open Item*** form



Open Items Log: **New Item**

OK Cancel

Attach File | Spelling... * indicates a required field

SupplierID *	Dell6869
Supplier Name	Dell Computers
Supplier Location	Round Rock, TX
Supplier Region	US
Open Item *	100 GB HDD
Category	Issue
Description	System down, waiting on replacement part(s)
WorkStream *	Systems Integration
Priority *	Medium
Owner	
Status	Deferred
DueDate	2/22/2011
Notes	Dell contact: Roger Taylor, 512-555-2800x2525
DateLogged *	2/17/2011

OK Cancel

- o View current **Open Item Log**. The new open item is now shown.



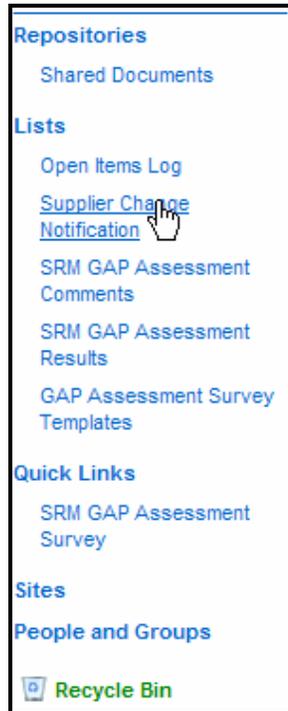
Open Items Log													
New	Actions	Settings											View: All Items
Category	Title	Status	WorkStream	Priority	Owner	Description	DueDate	DateLogged	Supplier Name	Supplier Location	Supplier Region	Open Item	
SupplierID: Dell6869 (1)													
Status: Deferred (1)													
Issue	Open Items Log NEW	Deferred	Systems Integration	Medium	Smith, James T	System down, waiting on replacement part (s)	2/22/2011	2/17/2011	Dell Computers	Round Rock, TX	US	100 GB HDD	
SupplierID: LACSU0001 (2)													
SupplierID: LACSU006 (1)													

5.2.1. Submit a New Change Notification

- Under External Sites, select Supplier Collaboration.



- Click **Supplier Change Notification** under the Quick Launch area.



- Select **New item** under the **New** tab.



- Specify the desired information for the supplier new change notification.



- Click **Submit**.

5.2.2. Add Attachment to the Supplier Change notification

- Repeat Section 5.2.1 from above to return to the **Supplier Change Notification: New item** page.



- Click on **Attach File**. The contents of the file can contain any information that clarifies the change.
- Browse to the appropriate file's location to select the file.
- Click OK to attach the file.

Supplier Change Notification: New Item

Use this page to add attachments to an item.

Name

5.2.3. View All Change Notifications

- Click Change Notifications under Quick Links.

Supplier Change Notification

Supplier Change Notification								
New Actions Settings								
ID	Title	Supplier Change Notification	Supplier Name	Supplier Location	Supplier Region	Supplier Contact Email	Part Description	Change Des
	Supplier Change Notification	In Progress	TEST	TEST			TEST BY NANCY	
	Supplier Change Notification	In Progress	Nancy	LC	USPR		test	
	Supplier Change Notification	In Progress	SharePoint	Lake County	USGPO	lowell.hauenstein@abbott.com	SharePoint User's manual	Added detail SCN.



Supplier Change Notification: **Supplier Change Notification**

Close

[New Item](#) | [Edit Item](#) | [Delete Item](#) | [Manage Permissions](#) | [Workflows](#) | [Alert Me](#) | [Workflow History](#)

SupplierID	NancyD
Supplier Name	Nancy
Supplier Location	LC
Supplier Region	USPR
Abbott Code	
Supplier Part Number	test
Part Description	test
Change Description	
Change Date	1/25/2010
Supplier Contact Email	
Supplier Contact Phone	

Created at 1/25/2011 9:49 AM by Liu, N.nancy N
Last modified at 1/25/2011 9:49 AM by Liu, N.nancy N

Close

5.3. Open Item

5.3.1. Submit a New Open Item

- Click New Open Item under Quick Links.
- Specify the desired information for the new open item.
- Click **Submit**.





Repositories

Shared Documents

Lists

[Open Items Log](#)

[Supplier Change Notification](#)

[SRM GAP Assessment Comments](#)

[SRM GAP Assessment Results](#)

[GAP Assessment Survey Templates](#)

Quick Links

[SRM GAP Assessment Survey](#)

Sites

People and Groups

[Recycle Bin](#)

Open Items Log

Priority	Owner	Description	DueDate	DateLogged	Supplier Name	Supplier Location	S
<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> New Item Add a new item to this list. </div>							
		SupplierID : LACSU0001 (2)					
		SupplierID : LACSU006 (1)					
		SupplierID : QuickBase (12)					
		SupplierID : SP0001 (1)					
		SupplierID : SUD2 (1)					
		SupplierID : SUPP0889 (4)					
		SupplierID : USPRSU0001 (1)					



Open Items Log: **New Item**

OK Cancel

Attach File Spelling... * indicates a required field

SupplierID *

Open Items Log: **New Item**

Use this page to add attachments to an item.

Name Browse... Name

OK Cancel

5.3.2. View All Open Items

- Click Open Items Log under Quick Links.

Repositories

Shared Documents

Lists

- [Open Items Log](#)
- [Supplier Change Notification](#)
- [SRM GAP Assessment Comments](#)
- [SRM GAP Assessment Results](#)
- [GAP Assessment Survey Templates](#)

Quick Links

[SRM GAP Assessment Survey](#)

Sites

People and Groups

[Recycle Bin](#)



Open Items Log

Category	Title	Status	WorkStream	Priority	Owner	Description	DueDate	DateLogged	Supplier Name	Supplier Location	Supplier Region	Open Item
SupplierID : LACSU0001 (2)												
SupplierID : LACSU006 (1)												
SupplierID : QuickBase (12)												
SupplierID : SP0001 (1)												
SupplierID : SUD2 (1)												
SupplierID : SUPP0889 (4) ← Expand to view the details and the status of this open item.												
Status : Open (4)												
Opportunity	Open Item : SUPP0889	Open	Communications	High		desc	1/25/2011		Rejina	Woodstock	LAC	testing
Issue	Open Item : SUPP0889	Open	Process	Low		descr	1/25/2011		Rejina	Woodstock	LAC	gssim
Issue	Open Item : SUPP0889	Open	Data Quality	Medium		Test	1/26/2011		Rejina	Woodstock	LAC	Item Log1
Opportunity	Open Item : SUPP0889	Open	Training	High		This is a test	1/26/2011		Rejina	Woodstock	LAC	Test opportunity
SupplierID : USPRSU0001 (1)												

SupplierID : SUD2 (1)												
SupplierID : SUPP0889 (4)												
Status : Open (4)												
Opportunity	Open Item : SUPP0889	Open	Communications	High		desc	1/25/2011		Rejina	Woodstock		
Issue	Open Item : SUPP0889	Open	Process	Low		descr	1/25/2011		Rejina	Woodstock		
Issue	Open Item : SUPP0889	Open	Data Quality	Medium		Test	1/26/2011		Rejina	Woodstock		
Opportunity	Open Item : SUPP0889	Open	Training	High		This is a test	1/26/2011		Rejina	Woodstock		
SupplierID : USPRSU0001 (1)												



Open Items Log: **Open Item : SUPP0889**

Close

New Item Edit Item Delete Item Manage Permissions Alert Me Workflow History	
SupplierID	SUPP0889
Supplier Name	Rejina
Supplier Location	Woodstock
Supplier Region	LAC
Open Item	Item Log1
Category	Issue
Description	Test
Work Stream	Data Quality
Priority	Medium
Owner	
Status	Open
DueDate	
Notes	
DateLogged	1/26/2011

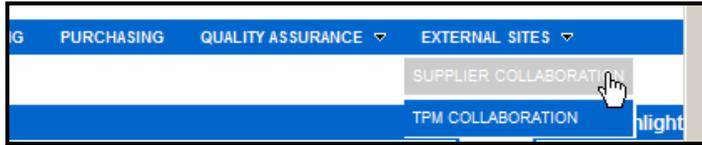
Created at 1/26/2011 7:41 AM by [Jalasutram, Aravinda](#)
Last modified at 1/26/2011 7:41 AM by [Thikkavarapu, Sundeep R](#)

Close

5.4. SRM GAP Assessment

5.4.1. Create a GAP Assessment Survey

- Preliminary requirements before a supplier can have a GAP Assessment Survey
 - Make sure the supplier is in the supplier list. Refer to **Section 4.1.2 and 4.1.3 Supplier Governance Teams** to verify/add suppliers.
 - Verify that there is a survey template available for the supplier. Refer to Section Error! Reference source not found. Create Survey Template
 -
- Go to the ***Eternal Sites*** drop-down menu and select ***Supplier Collaboration***.



- The **Supplier Collaboration** page opens. In the Quick Links section, select **SRM GAP Assessment Survey** as shown below.



- In the **SRM GAP Assessment Survey Management** window, select **Create Survey**.



SRM GAP Assessment Survey Management

* Required fields

Select an Option : Create Survey Retrieve Survey Results

- As shown in the following three illustrations, select:
 - **Select a Supplier** from the drop-down menu
 - Select a unique name and enter it in the **Enter a Survey Name** text box
 - From the drop-down menu, select a template used for this survey
 - Select **Create Survey**

The screenshot shows a web application interface. On the left, a dropdown menu is open, displaying a list of suppliers. The selected item is "Hospira, Inc. - Lake Forrest, IL - HOS1502". The main area of the page contains a navigation bar with tabs for "MANUFACTURING", "PURCHASING", "QUALITY ASSURANCE", and "EXTERNAL SITES". Below the navigation bar, there are two text input fields: "Enter a Survey Name *" and "Select a Survey Template *". The "Select a Survey Template *" field has a dropdown menu with "Select A Template" selected. A "Create Survey" button is located to the right of the input fields. The top right corner of the page displays "Welcome Hauenstein, Ric".



SRM GAP Assessment Survey Management

* Required fields

Select an Option : Create Survey Retrieve Survey Results

Select a Supplier * Enter a Survey Name * Select a Survey Template *

Hospira, Inc. - Lake Forrest, IL - HOS1502 HOS001 Select A Template Create Survey

- Select A Template
- GAP Assessment Survey
- nancy template
- Regulated Substances
- Dell Computers
- ACME
- Hospira

- Click Create Survey
- If the survey has been created, the message Survey Created Successfully for (survey name). Click here to open the survey. Click on here to open the survey.

SRM GAP Assessment Survey Management

Survey Created Successfully for Hospira, Inc. - Lake Forrest, IL. [Click here](#) to open the survey

* Required fields

Select an Option : Create Survey Retrieve Survey Results

Select a Supplier * Enter a Survey Name * Select a Survey Template *

Select A Supplier Select A Template Create Survey

- Select Respond to this Survey.
- The survey templates are unique to various suppliers. However, some of the surveys for similar suppliers may be very similar or identical.



Hospira, Inc. - Lake Forrest, IL

HOSPIRA, INC. - LAKE FORREST, IL SUPPLIER COLLABORATION

Hospira, Inc. - Lake Forrest, IL > HOS001

HOS001

Respond to this Survey Actions Settings

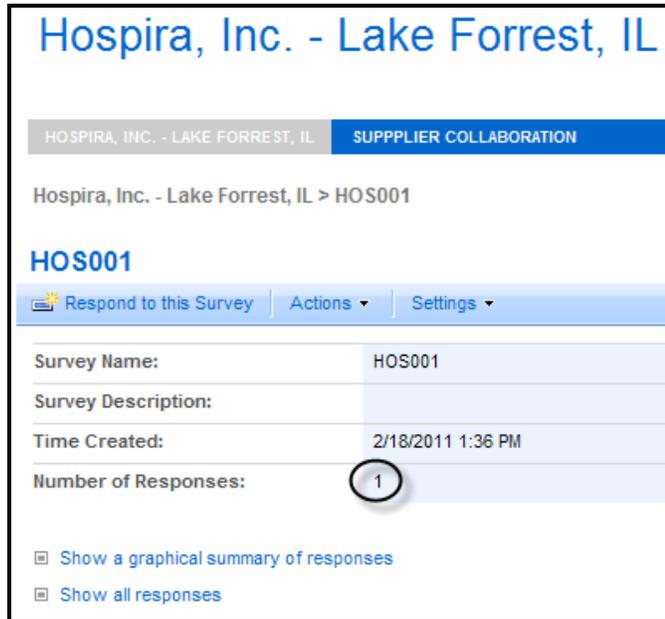
Respond to this Survey

Survey Name:	HOS001
Survey Description:	
Time Created:	2/18/2011 1:36 PM
Number of Responses:	0

Show a graphical summary of responses

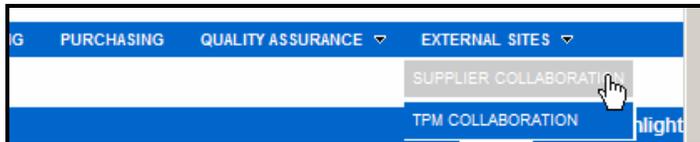
Show all responses

- When the survey opens, respond to the questions/comments. Refer to Section **2.10.3**
- Click **Finish** when the survey is completed.
- The supplier survey summary is displayed.
- There is only one survey per supplier. The links **Show a graphical summary of responses** and **Show all responses** are of little interest.



5.4.2. Retrieve Gap Assessment Survey Results

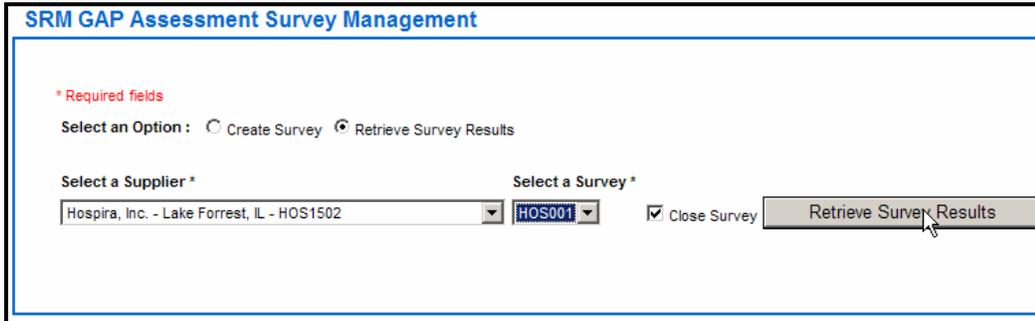
- Go to the ***Eternal Sites*** drop-down menu and select ***Supplier Collaboration***.



- The ***Supplier Collaboration*** page opens. In the Quick Links section, select ***SRM GAP Assessment Survey*** as shown below.



- In the SRM GAP Assessment Survey Management window, select **Retrieve Survey Results**.



- Select the supplier whose results are required.
- **Select a Survey** from the drop-down menu. The unique name for the survey will be one of the options.
- Click Retrieve **Survey Results**



SRM GAP Assessment Survey Management

Results retrieved Successfully
* Required fields

Select an Option : Create Survey Retrieve Survey Results

Select a Supplier *

Select A Supplier

GPO PROCUREMENT HOME SUPPLIER MANAGEMENT THIRD PARTY MANUFACTURING

GPO Procurement Home > Supplier Collaboration > SRM GAP Assessment Results

SRM GAP Assessment Results

New Actions Settings

Edit	Question	Strongly Disagree
<input type="checkbox"/>	Survey : Nancy Test - Supplier Nancy - LC - NancyID - 1/25/2011 (2)	
<input checked="" type="checkbox"/>	Survey : Rejina - Rejina - Woodstock - SUPP0889 - 2/11/2011 (4)	
<input type="checkbox"/>	Survey : test - Test Supplier1 - Test Location1 - USPRSU0001 - 1/25/2011 (2)	
<input type="checkbox"/>	Survey : Test survey Rejina - Rejina - Woodstock - SUPP0889 - 1/26/2011 (2)	

Left Sidebar:
Repositories
Shared Documents
Lists
Open Items Log
Supplier Change Notification
SRM GAP Assessment Comments
SRM GAP Assessment Results
GAP Assessment Survey Templates
Quick Links



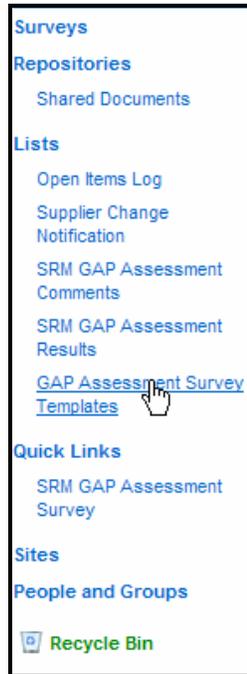
SRM GAP Assessment Results					
New ▾ Actions ▾ Settings ▾					
Edit	Question	Strongly Disagree	Disagree	Neutral	Agree
Survey : Nancy Test - Supplier Nancy - LC - NancyID - 1/25/2011 (2)					
Survey : Rejina - Rejina - Woodstock - SUPP0889 - 2/11/2011 (4)					
	Test2	0	0	1	0
	Test	0	0	0	1
	Test2	0	0	1	0
	Test	0	0	0	1
Survey : test - Test Supplier1 - Test Location1 - USPRSU0001 - 1/25/2011 (2)					
Survey : Test survey Rejina - Rejina - Woodstock - SUPP0889 - 1/26/2011 (2)					

5.4.3. Create SRM GAP Template

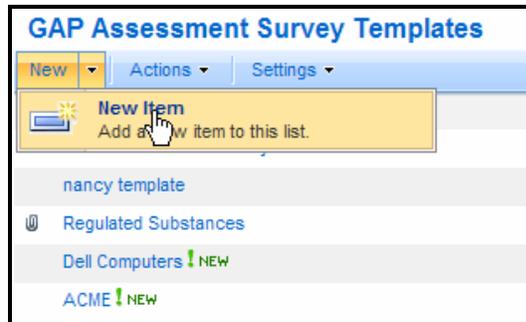
- Navigate to the Supplier Collaboration site under External Sites.



- Create an SRM GAP template using the procedure in Section 2.10.4 Create a Survey Template.
- In the **Quick Launch**, add the new SRM GAP Template by clicking on **GAP Assessment Templates**.



- Note: Make sure that the template to be added was actually saved as a template. If saved as a survey, then the assessment will not function properly.



- In the **New Item** page, type the template name. NOT the file name of the template.



- The new template is now shown on the **GAP Assessment Survey Templates** list.

5.4.4. Copy SRM GAP Template

- Follow the same procedure as shown in Section 2.10.5.

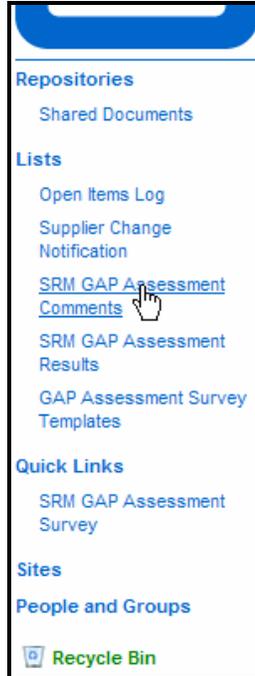
5.4.5. View SRM GAP Assessment Results

5.4.6. SRM GAP Assessment Comments

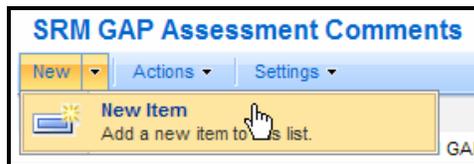
- Select Supplier Collaboration under the External Sites tab.



- In the *Quick Launch* area, select SRM GAP Assessment Comments



- The **SRM GAP Assessment Comments** screen opens. Under the **New** tab, select **New Item**.





- Enter the **Survey** name
- Enter the **Question**

SRM GAP Assessment Comments: **New Item**

Attach File | Spelling... * indicates a required field

Survey *

Question *

Answers - Abbott

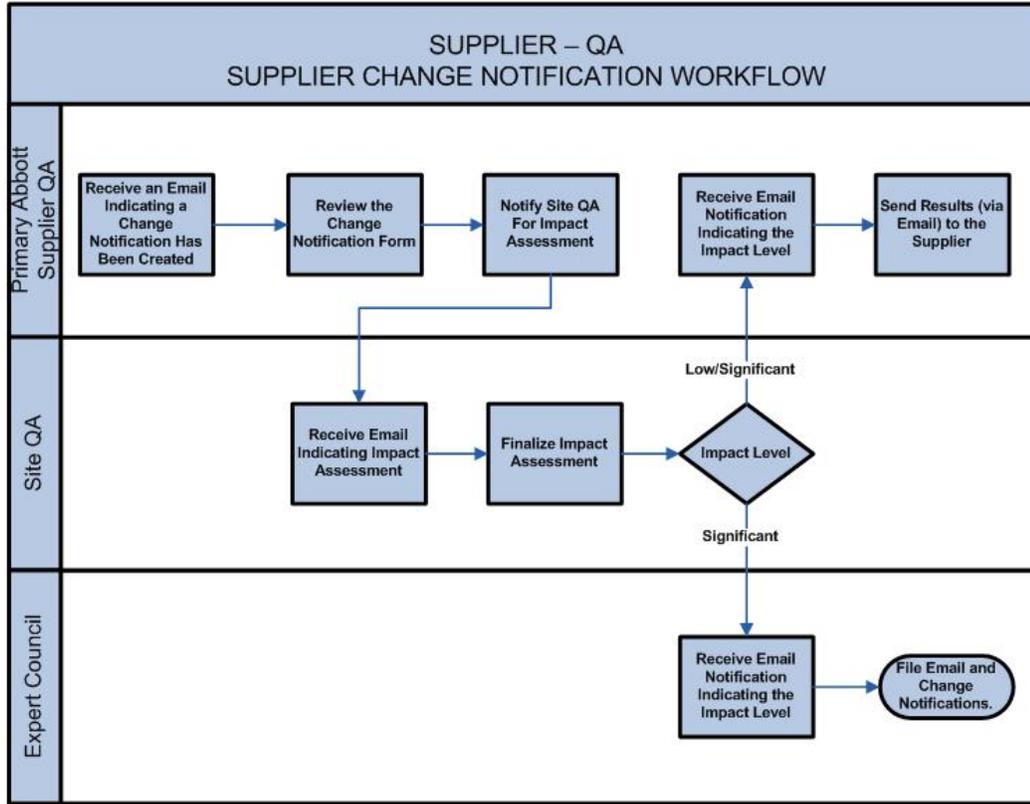
Answers - Supplier

OK Cancel

- Enter the appropriate comment(s) as an Abbott respondent to the question.
- Enter the appropriate comment(s) as a supplier respondent to the question.



5.5. SCN Workflow





6. TPM COLLABORATION

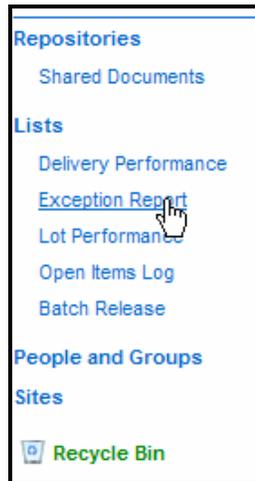
6.1. Exception Report Without Attachment

6.1.1. External TPM Responsibility

- Create an exception report by selecting **TPM Collaboration** under the **External Sites** pull down menu.



- Select Exception Report from the Quick Launch area.





- At the **Exception Report** screen, click on **New** and then **New item**.

The screenshot shows the 'Exception Report' interface. At the top left, there are three dropdown menus: 'New', 'Actions', and 'Settings'. The 'New' dropdown is open, showing a 'New Item' option with a tooltip that says 'Add a new item to this list.' Below the dropdowns is a table with the following data:

High Impact	Date of Event	Date of Notification	Date 1st Draft Rec'd by TPM QA	Date Approved by TPM QA
No	1/24/2011	1/24/2011	1/24/2011	

Below the table, there is a text field containing 'Report : test' and a '- test' button.



- Complete the required fields:
 - TPM tracking number
 - High Impact (yes/No)
 - Date of Event (use the calendar icon)
 - Date of Notification (defaults to the present date)
 - Status

Status *

Initiated

Initiated
Submitted
Sent Back for Review
Approved
Rejected

- Email notification is sent to the TPM
- Sample email indicating that the exception report will follow.

Workflow 2007
Workflow Notification

TPMnameTest has submitted an Exception Event notification for Lot 1-18-001. Exception Report number Track1-18-001.

Short description:
Issue 74 Test

Notification only-Draft Report will be submitted later. Click link to view event details:

<http://www00130d:16787/TPMCollab/Lists/ExceptionReport/DispForm.aspx?ID=163>

- Another email is sent when the exception report is released to the TPM.

Subject: Draft of Exception Report from Hospira - Montreal, LAC is ready for your review

Workflow 2007
Workflow Notification

First Draft of Exception Report 1 from Hospira - Montreal, LAC is now ready for your review.

Short description:
test email.

To complete the task, please follow these steps:

1. Click link below to review report:
[Exception Report : LACTPM041](#)
2. After report is reviewed, click [here](#) to take action (Approve, delegate, provide feedback).

Note: You may also click [here](#) to view the workflow status.

- The TPM can do one of three things:



- View the workflow status
- View the Exception Report
- Take action.

To complete the task, please follow these steps:

1. Click link below to review report:

[Exception Report : LACTPM041](#)

2. After report is reviewed, click [here](#) to take action (Approve, delegate, provide feedback).

Note: You may also click [here](#) to view the workflow status.

6.1.2. Secondary Approver Responsibility

6.2. Exception Report With Attachment

6.2.1. External TPM Responsibility

- Complete exception Report as shown in Section 6.1.1
- Attach the supporting document(s) by clicking on Attach File

The screenshot shows a software interface with a menu bar containing 'Attach File', 'Delete Item', and 'Spelling...'. Below the menu bar, there are two input fields: 'TPM Tracking Number *' with the value '1' and 'High Impact *' with a dropdown menu showing 'No'.

- Browse to the location of the required document.

The screenshot shows a dialog box titled 'Exception Report: Exception Report : LACTPM041'. Below the title, it says 'Use this page to add attachments to an item.' There is a 'Name' field with a 'Browse...' button next to it. At the bottom, there are 'OK' and 'Cancel' buttons.



- Click OK and an email notification is sent to the TPM QA

Subject: Draft of Exception Report from Hospira - Montreal, LAC is ready for your review

Workflow 2007

Workflow Notification

First Draft of Exception Report 1 from Hospira - Montreal, LAC is now ready for your review.

Short description:
test email.

To complete the task, please follow these steps:
1. Click link below to review report:
[Exception Report : LACTPM041](#)
2. After report is reviewed, click [here](#) to take action (Approve, delegate, provide feedback).

Note: You may also click [here](#) to view the workflow status.

- The TPM can do one of three things:
 - View the workflow status
 - View the Exception Report
 - Take action.

To complete the task, please follow these steps:
1. Click link below to review report:
[Exception Report : LACTPM041](#)
2. After report is reviewed, click [here](#) to take action (Approve, delegate, provide feedback).

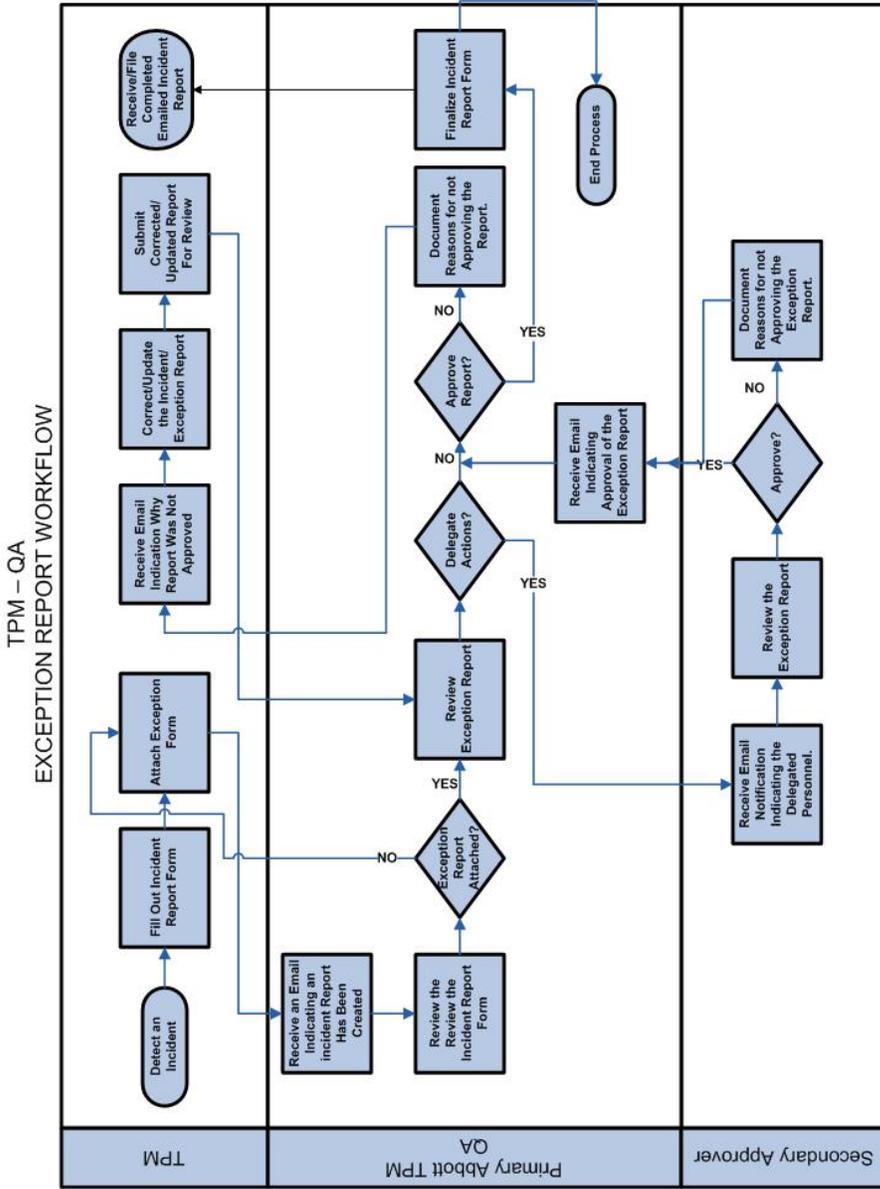
Note: You may also click [here](#) to view the workflow status.

- Send to primary TPM for approval
- If not approved, sent back to the external TPM for changes/comments
- Complete exception report

6.2.2. Secondary Approver Responsibility



6.3. TPM Exception Report Workflow





7. THIRD PARTY MANUFACTURER



8. QUALITY ASSURANCE

