

# **USER GUIDE**

## FOR

# SUPPLIER PORTAL



# SHARED APPLICATION SERVICES

# **INFORMATION TECHNOLOGY**

# GLOBAL PHARMACEUTICAL OPERATIONS

**Global Pharmaceutical Operations** 

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Glossary of Terms SharePoint Layout

## 1. GLOSSARY OF TERMS

| САРА  | 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            |
| КРІ   | Key Performance Indicator                        |
| PPG   | Pharmaceutical Products Group                    |
| RB    | Review Board                                     |
| RFI   | Request For information                          |
| SAS   | Shared Application Systems                       |

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Glossary of Terms SharePoint Layout

| 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  |
| ТРМ        | Third Party Manufacturer  |
| URS        | User Requirements Specification   |
| ∨мі        | Vendor Managed Inventory  |
| WSS        | Windows SharePoint Services   |

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#### 2. BASIC FUNCTIONS

#### 2.1. SharePoint Layout

| Welcome NOF  | RTHAMERICA\HAUENLR •   My Site   M   | ly Links 🔹   🔞  |
|--|--|---|
| Supplier Management  | ier Management 💌   | Abbott<br>A Promise for Life  |
| OPO PROCUREMENT         UMPLER MANAGEMENT         THIND FAMITY MANAFACTURING         PURITIVE MANAGEMENT         EXTERNAL DBE 1           Navigation Bar | ub Sites   | Site Actions -  |
| There are no items to show in this view of the "Significant Events" list. To create a new item, click: "New" above. Web Part LEFT Zone 1                 | Web Part   | r<br>RIGHT<br>Zone 1  |
| There are no items to show in this view of the "Significant Events" list. To create a new item, click "New" above.                                       | ,  | ę   |
| Web Part LEFT<br>Zone 2  | Web Part   | RIGHT<br>Zone 2   |
| There are no items to show in this view of the "Significant Events" list. To oreate a new item, click "New" above.                                       | Web Part   | RIGHT   |
|  | Supplier Management<br>Tors Ster Supplier Management<br>Margation Bar<br>Gro Procurement > Quality Assurance > Supplier Management<br>Memory Margation Bar<br>Gro Procurement > Quality Assurance > Supplier Management<br>Memory Margation Bar<br>Gro Procurement > Quality Assurance > Supplier Management<br>Memory Margation Bar<br>Gro Procurement > Quality Assurance > Supplier Management<br>Meb Part LEFT<br>Zone 1<br>There are no items to show in this view of the 'Significant Events' last. To create a new item, click 'New' above.<br>Meb Part LEFT<br>Zone 1<br>There are no items to show in this view of the 'Significant Events' last. To create a new item, click 'New' above.<br>Meb Part LEFT<br>Zone 2<br>Meb Part LEFT<br>Zone | Webcome NORTH-MMERICALHAUENCE       My Set 1 My         Supplier Management       This Site: Suppler Management         Maryingation Bar       The DRATH MANAGEMENT         GPO Procurement > Quality Assurance > Supplier Management       The DRATH MANAGEMENT         Intere are no items to abov in this view of the "Significant Events" list. To create a new item, click "New" above.       Web Part         Web Part       LEFT         Zone 1       Web Part         Web Part       LEFT         Zone 2       Web Part |

#### 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.



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

| GPO Procu            | rement Hor          | ne                        |            |                     |                    |       | A Promise for Life |
|----------------------|---------------------|---------------------------|------------|---------------------|--------------------|-------|--------------------|
|                      |                     |                           |            | This Site: GPO F    | Procurement Home 💌 |       | go                 |
| GPO PROCUREMENT HOME | SUPPLIER MANAGEMENT | THIRD PARTY MANUFACTURING | PURCHASING | QUALITY ASSURANCE 🗢 | EXTERNAL SITES 🔻   | PUB 🔻 |                    |

#### 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.

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• 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 priviledge 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

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Basic Functions Document Libraries



• In the All Site Content screen, click on Create

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| Create                 |   |
|------------------------|---|
| Name                   | Description                               |
| Document Libraries     |   |
| Documents              | This system libra<br>documents that ε     |
| Form Templates         | This library conta<br>activated to this s |
| GPO Terms and Acronyms | This Wiki library                         |
| images                 | This system libra<br>images that are ι    |
| log News Letters       |   |
| Pages                  | This system libra<br>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** 

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| Document Lib<br>Create a docum<br>Document libra                          | rary<br>nent library when you have a<br>ries support features such as |
|---|---|
|   |   |
| Libraries   | Communications  |
| Libraries   | Communications <ul> <li>Announcements</li> </ul>                      |
| Libraries Document Library Form Library                                   | Communications <ul> <li>Announcements</li> <li>Contacts</li> </ul>    |
| Libraries Document Library Form Library Wiki Page Library                 | Communications Contacts Discussion Board                              |
| Libraries Document Library Form Library Wiki Page Library Picture Library | Communications Announcements Contacts Discussion Board                |

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

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| SharePoil                           | nt Training Documentation                               |
|-------------------------------------|---|
| Description:                        |   |
| This librar<br>SharePoir            | y consists of all available GPO                         |
| <ul><li>Displ</li><li>Yes</li></ul> | ay this document library on the Quick Launch?           |
| Create a vers<br>O Yes              | ion each time you edit a file in this document library? |
| Document Te                         | mplate:   |
| Microsoft Of                        | fice Word 97-2003 document                              |

- 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

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- 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 Documenta                            | SharePoint Training Documentation |   |              |                       |  |  |  |  |
| This library consists of all available GPO Sha           | arePoint training materials.      |   |              |                       |  |  |  |  |
| New   Upload   Actions   Settings                        | •                                 |   |              | View: All Documents • |  |  |  |  |
| Type Name  | Modified                          | O Modified By   | Comments     |                       |  |  |  |  |
| There are no iteme to show in this view of the "Shar     | Point Training Documentation"     | document library. To create a new item, click "New" or "I | pload" above |                       |  |  |  |  |

#### 2.2.2. Delete/Remove a Document library

- Must have Administrator priviledge 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

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

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| GPO | Procu | rement | Home | > | All | Site | Content |
|-----|-------|--------|------|---|-----|------|---------|
| All | Site  | Conte  | ent  |   |     |      |         |

| m <sup>3</sup> Create             |
|-----------------------------------|
| Name                              |
| Document Libraries                |
| Documents                         |
| Form Templates                    |
| SharePoint Training Documentation |
| images                            |

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

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

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

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# **Customize SharePoint Training Documentation**

| List Information |   |  |  |
|------------------|---|--|--|
| Name:            | SharePoint Training Documentation   |  |  |
| Web Address:     | http://ww00130d:16787/SharePoint Training Documentation/Forms/AllItems.aspx |  |  |
| Description:     | This library consists of all available GPO SharePoint training materials.   |  |  |
|                  |   |  |  |
| General Settings | Permissions and Management  |  |  |
|                  |   |  |  |

Title, description and navigation Delete this document library Versioning settings

Advanced settings

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.

| Message | from webpage   | x  |
|---------|--|----|
| ?       | This document library will be removed and all its files will be deleted. Are you sure you want to send this docume<br>library to the site Recycle Bin? | nt |
|         | OK Cancel  |    |

- Click OK to delete the selected library. ٠
- 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

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Basic Functions Document Libraries

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.**

| New •        | Upload | Actions  | Settings 🔹                            |   |
|--------------|--------|--|---------------------------------------|---|
| Туре         |        | Upload Document  | from your computer                    | odified 🔘 Modified By   |
| There are no | -      | to this library.   | from your computer                    | Documentation" document library. To create a new item, click "New" or "Upload" above. |
|              |        | Upload Multiple Do<br>Upload multiple doc<br>computer to this libr | ocuments<br>uments from your<br>rary. | © 2011 Abbott Laboratories, Abbott Park, Illinois, U.S.A.                             |

• In the Upload Document section, click Browse.

| Upload Document: SharePoint Training Docu                                      | umentation   |        |        |
|--|--|--------|--------|
| Upload Document<br>Browse to the document you intend to upload.                | Name:<br>Upload Multiple Files<br>I Add as a new version to existing files | Browse |        |
| Version Comments<br>Type comments describing what has changed in this version. | Version Comments:  |        | ×      |
|  |  | OK     | Canaal |
|  |  | UK     | Cancel |

• 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**.

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| hoose File to Up   | load           |  |      |   | <u> </u>   | .6%2D5B5E198 💌 🍫 🕻   |
|--|----------------|--|------|---|--|--|
| Look in:   | C SharePoint   |  | • 0  | 1 😕 🖽   | •  |  |
| My Recent<br>Documents<br>Desktop<br>My Documents<br>My Computer |                | metallic-orb-icon-business-tool-wre<br>blue<br>e<br>e<br>v1.0 FRS v1.0<br>v1.0 FRS v1.0<br>rtal Home Page Mock Up<br>g Strategy draft<br>rey<br>D3 | nch1 | Sample Q Son_work Son_work SharePoir SharePoir SharePoir SharePoir Supplier P Supplier P Supplier P Training N Training N Training N Supio-Supplier Supplier Supplier P Supplie | Iuestions for GAP :<br>flow<br>flow<br>nt Added Web Pa<br>nt edit webpart de<br>nt Layout<br>nt_golden_men<br>nt_logo<br>Portal User Guide<br>Cture<br>Modules for A Size: 7.9<br>Date Mo<br>Dier-OA Supare Mo | Portal User Guide-training<br>crosoft Word Document<br>7 MB<br>dified: 2/28/2011 4:51 PM |
|  | •              |  |      |   |  |  |
| My Network   | File name:     | Supplier Portal User Guide-traini  | ng   | -   | Open   |  |
| Fidues   | Files of type: | All Files (*.*)  |      | -   | Cancel   |  |
|  |                |  |      |   | Upload   | Multiple Files<br>Id as a new version to e   |

• Then click OK.

# SharePoint Training Documentation: Supplier Portal User Guide-training

| The document was uploaded succes   | sfully. 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<br>Created at 3/1/2011 10:03 AM by<br>Last modified at 3/1/2011 10:03 AM by |   | OK Cancel                    |

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|--------|----------------|------------|
|--------|----------------|------------|

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 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

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Basic Functions Document Libraries

| 🞯 Desktop                               | Name Name                        | Size Modified            |
|---|----------------------------------|--------------------------|
| 🖻 😼 My Computer                         | SharePoint Procedures Part 1.doc | 56 KB 1/10/2011 11:17 AM |
| ⊕ Socal Disk [C:]                       | SharePoint Procedures Part 2.doc | 56 KB 1/10/2011 11:15 AM |
| H H Hauentron 'I CHome01\Users5\$' (H:) | SharePoint Procedures Part 3.doc | 56 KB 1/10/2011 11:17 AM |
| Galacting on Echonical Resolution (11.) | SharePoint Procedures Part 4.doc | 56 KB 1/10/2011 11:16 AM |
| 🗄 🛗 links                               |                                  |                          |
| - My Documents                          |                                  |                          |
|   |                                  |                          |
| 🕀 🛅 SharePoint                          |                                  |                          |

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

| Internet Explorer |  |  |  |  |
|-------------------|--|--|--|--|
| 2                 | You are about to upload 4 file(s) to ww00130d. |  |  |  |
|                   | Do you want to continue?                       |  |  |  |
|                   | Yes No   |  |  |  |

• The library now has five documents available for sharing.

## **SharePoint Training Documentation**

This library consists of all available GPO SharePoint training materials.

| New  | Upload      Actions      Settings        |                   |
|------|--|-------------------|
| Туре | Name                                     | Modified          |
| W)   | SharePoint Procedures Part 1             | 3/1/2011 10:13 AM |
| W)   | SharePoint Procedures Part 2             | 3/1/2011 10:13 AM |
| W)   | SharePoint Procedures Part 3 . NEW       | 3/1/2011 10:13 AM |
| W)   | SharePoint Procedures Part 4 . NEW       | 3/1/2011 10:13 AM |
| W)   | Supplier Portal User Guide-training LNEW | 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.

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 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.

| Vew  | •                                  | Upload 🔹                         | Actions •         | Setting  | s 🔻   |   |  |  |
|------|------------------------------------|----------------------------------|-------------------|--|---|---|--|--|
| Гуре | Ni                                 | ame                              |                   |  | Cre   | ate Column  |  |  |
| M)   | S                                  | SharePoint Procedures Part 1 🚺 🎹 |                   |  | Add a column to store additional information about each item. |   |  |  |
| W)   | S                                  | harePoint Proc                   | edures Part 2 🕻 N |  | Cre   | ate View  |  |  |
|      | S                                  | harePoint Proc                   | edures Part 3 ! N | Q  | Crea<br>and   | ate a view to select columns, filters,<br>other display settings. |  |  |
| M)   | S                                  | harePoint Proc                   | edures Part 4 🕻 N |  | Doc   | ument Library Settings  |  |  |
|      | Supplier Portal User Guide-trainin |                                  | Mar<br>colu       | age settings such as permissions,<br>mns, views, and policy. |   |   |  |  |
|      |                                    |                                  |                   |  | Mar<br>Edit<br>libra  | nage Workflows<br>or delete workflows in this list or<br>ry.      |  |  |
|      |                                    |                                  |                   | -  | Crea<br>Crea  | ate Workflow<br>ate a new workflow using the Nintex               |  |  |

#### List Information

| Name:        | SharePoint Training Docume     |
|--------------|--------------------------------|
| Web Address: | http://ww00130d:16787/Sha      |
| Description: | This library consists of all a |

#### **General Settings**

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

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### Document Library Versioning Settings: SharePoint Training Documentation

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

- 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   |                     |
|------|-------------------------------------|---------------------|
| Туре | Name                                | Modified            |
| W    | 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 I NEW  | 3/1/2011 10:13 AM   |
| M    | SharePoint Procedures Part 4 I NEW  | 3/1/2011 10:13 AM   |
|      | Supplier Portal User Guide-training | 3/1/2011 10:05 AM   |
|      |                                     |                     |

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|          |                                     |    | View Properties               |
|----------|-------------------------------------|----|-------------------------------|
|          |                                     |    | Edit Properties               |
|          |                                     | 23 | Manage Permissions            |
| New      | Upload      Actions      Settings   |    | Edit in Microsoft Office Word |
| Туре     | Name                                | ×  | Delete                        |
|          | SharePoint Procedures Part 1        |    | Send To                       |
|          | SharePoint Procedures Part 2 INEW   | b  | Check Out                     |
|          | SharePoint Procedures Part 3 I NEW  | ៀ  | Publish a Major Version       |
| <b>B</b> | SharePoint Procedures Part 4 I NEW  | 2  | Version History               |
|          | Supplier Portal User Guide-training | Ý  | Workflows                     |
|          |                                     | 8  | View Workflow History         |
|          | C                                   | 88 | Schedule Workflows            |
|          |                                     |    | Alert Me                      |

• 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.

| Microsoft Internet Explorer X   |   |    |  |  |
|---|---|----|--|--|
| You are about to check out:<br>Name:rocedures Part 1.doc<br>From: ww00130d:16787<br>IV Use my local drafts folder |   |    |  |  |
|   | OK Cancel   |    |  |  |
| Some file<br>suspiciou  | s can harm your computer. If this information looks<br>s, or you do not fully trust the source, do not open the fil | e. |  |  |

- 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*"

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|-----------------------------------|----------------------------------|
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Basic Functions Document Libraries



- 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:

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| SharePoint Training Documentation  |   |        |
|--|---|--------|
| File Edit View Favorites Tools Help  |   |        |
| Back 🔹 🕥 🚽 🏂 🔎 Search 🎼 Folders  |   |        |
| Address 🛅 C:\Documents and Settings\hauenIr\My Documents   | \SharePoint Drafts\ww00130d#16787\SharePoint Training Documentation | 🔽 🄁 Go |
| Folders       ×         Image: Second Sec | SharePoint Procedures Part 1<br>Microsoft Word Document<br>66 KB    |        |

- 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**.

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|      |                                     |     | View Properties               |
|------|-------------------------------------|-----|-------------------------------|
|      |                                     |     | Edit Properties               |
|      |                                     | ê., | Manage Permissions            |
|      |                                     |     | Edit in Microsoft Office Word |
|      |                                     | ×   | Delete                        |
|      |                                     |     | Send To                       |
| New  | Upload     Actions     Settings     |     | Check In                      |
| Туре | Name                                |     | Discard Check Out             |
|      | SharePoint Procedures Part 1        | 5   | Version History               |
|      | SharePoint Procedures Part 2        | Ì   | Workflows                     |
| 1    | SharePoint Procedures Part 3        | 82  | View Workflow History         |
|      | SharePoint Procedures Part 4        | 88  | Schedule Workflows            |
|      | Supplier Portal User Guide-training |     | Alert Me                      |

• 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**.

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|      |   |          | View Properties               |
|------|---|----------|-------------------------------|
|      |   |          | Edit Properties               |
|      |   | ٩.       | Manage Permissions            |
| New  | Upload      Actions      Settings         | •        | Edit in Microsoft Office Word |
| Туре | Name                                      | ×        | Delete                        |
|      | SharePoint Procedures Part 1              |          | Send To                       |
|      | SharePoint Procedures Part 2 I NEW        | Ŀ        | Check In                      |
|      | SharePoint Procedures Part 3 ! NEW        | <b>b</b> | Discard Check Out             |
|      | SharePoint Procedures Part 4 ! NEW        | 2        | Version History               |
| W    | Supplier Portal User Guide-training ! NEW | Ŵ        | Workflows                     |
| _    |   | 8        | View Workflow History         |
|      | C   | 83       | Schedule Workflows            |
|      |   |          | Alert Me                      |

### • The *Check In* screen is displayed.

| спеск іп   |  |
|--|--|
| Use this page to check in a document that you have currently checked out.  |  |
| Document Check In<br>Other users will not see your changes until you check in. Specify options for<br>checking in this document. | <ul> <li>What kind of version would you like to check in?</li> <li>0.3 Minor version (draft)</li> <li>1.0 Major version (publish)</li> <li>0.2 Overwrite the current minor version</li> <li>Keep the document checked out after checking in this version?</li> <li>Yes  <ul> <li>No</li> </ul> </li> </ul> |
| Comments<br>Type comments describing what has changed in this version.   | Comments:  |
|  | OK Cancel  |

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- 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.

| New  | Upload      Actions      Settings   |
|------|-------------------------------------|
| Туре | Name                                |
| W    | SharePoint Procedures Part 1        |
|      | SharePoint Procedures Part 2        |
| W    | SharePoint Procedures Part 3        |
| M)   | SharePoint Procedures Part 4        |
| W)   | Supplier Portal User Guide-training |

#### 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 priviledge 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

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Abbott Laboratories – Global Pharmaceutical Operations (GPO – IT)



Basic Functions Picture (Image) Libraries



• In the All Site Content screen, click on Create

| All Site Content   |             |
|--------------------|-------------|
| Create             |             |
| Name               | Description |
| Document Libraries |             |

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

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Basic Functions Picture (Image) Libraries

| Create   |   |  |   |
|--|---|--|---|
| Picture Library<br>Create a picture<br>for managing an           | /<br>I library when you have picture<br>Id displaying pictures, such as | es you want to share. Picture I<br>s thumbnails, download options        | braries provide special features<br>, and a slide show.   |
| Libraries  | Communications  | Tracking   | Custom Lists  |
| Document Library   | Announcements   | Links  | Custom List   |
| Form Library   | Contacts  | Calendar   | Custom List in Datasha  |
|  |   |  | = Gustom List in Datasite   |
| Wiki Page Library  | Discussion Board  | Tasks  | <ul> <li>Languages and Transla</li> </ul>   |
| Wiki Page Library     Picture Library                            | Discussion Board  | <ul><li>Tasks</li><li>Project Tasks</li></ul>                            | <ul> <li>Languages and Transla</li> <li>KPI List</li> </ul>   |
| Wiki Page Library <u>Picture Library</u> Data Connection Library | Discussion Board  | <ul> <li>Tasks</li> <li>Project Tasks</li> <li>Issue Tracking</li> </ul> | <ul> <li>Custom List in Datasite</li> <li>Languages and Transla</li> <li>KPI List</li> <li>Lot Performance</li> </ul> |

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

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| Name:  |  |  |  |  |
|--|--|--|--|--|
| SharePoint Images and Pictures   |  |  |  |  |
| Description:   |  |  |  |  |
| All graphics relating to SharePoint are stored in this library.                  |  |  |  |  |
| Display this picture library on the Quick Launch?<br>Yes INO                     |  |  |  |  |
| Create a version each time you edit a file in this picture library?<br>C Yes INO |  |  |  |  |
| Create Cancel  |  |  |  |  |

- 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.

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# **SharePoint Images and Pictures**

| All graphics relating to SharePoint are stored in this library. |          |           |            |              |
|---|----------|-----------|------------|--------------|
| New 🕶   | Upload 🝷 | Actions • | Settings • |              |
| Тур   | е        |           | Name       | Picture Size |

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

All graphics relating to SharePoint are stored in this library.



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

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| Choose File to U   | pload  | <u>? ×</u>  | 534%2D08EA9F7 🔽 😽 🗙  | 餐 Live Search  |  |
|--|--|---|--|--|--|
| Look in  | : 🔁 SharePoint 💽 🔇   | ) 🤣 🔛 🖽 -   |  |  |  |
| My Recent<br>Documents<br>Desktop<br>My Documents<br>My Computer<br>My Network<br>Places | 1     2     1     2     2     0     075912-blue-metalik-orb-icon-business-tool-wrench1     3bbott-logo_blue     1     Beginning Side     Type: Snaglt Editor Image     Size: 9.90 (R)     boctlb_1     bete Modified: 1/6/2011 10:26 AM     Costlb_1     Costlb_1     SiztM QA Portal Home Page Mock Up     GSSIM Portal V.O RS v1.0     GSSIM Training Strategy draft     Gomen_folder_grey     minutes_jan_03     Portal Mockup     File name: abbott_logo_blue     Files of type: All Files (".") | Sample Questions for GAP:<br>Sample Questions for GAP:<br>Sam_workflow<br>SharePoint Added Web Pa<br>SharePoint Added Web Pa<br>SharePoint Layout<br>SharePoint, Golden, men<br>Suppler Portal User Guidet<br>Suppler Portal User Guidet<br>Suppler Portal User Guidet<br>Fring Modules for Users<br>Training Modules for Admin<br>Training Modules for Admin<br>Training Modules for Users<br>Training Modules for Lesrs<br>Training M | Image: Contract of the second sec | Image: Image | Safety + Tools + ()<br>  My Links +   ()<br>Site Actions + |
|  |  |   |  | ОК   | Cancel   |

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|                            |                                  |                           | ОК         | Cancel            |
|----------------------------|----------------------------------|---------------------------|------------|-------------------|
| 🗙 Delete Item   💝 Spelling | ]                                |                           | * indicate | s a required fiel |
| Name *                     | abbott_logo_blue                 | JPG                       |            |                   |
| Preview                    |                                  |                           |            |                   |
| Title                      | Abbett Logo                      |                           |            |                   |
| Date Picture Taken         | 3/1/2011                         |                           |            |                   |
| Description                | Official Abbott Logo for all pre | esentations and formal do | cuments.   | A.                |
|                            | Used as alternative text for th  | e picture.                |            |                   |
| Keywords                   |                                  |                           |            | <u> </u>          |
|                            |                                  |                           |            | -                 |

• All fields are optional:

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- o Title
- Date Picture Taken
- Description
- o 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 I 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         | <ul> <li>Actions • Settings •</li> </ul>  |              |
|----------|----------------|---|--------------|
| Тур      | Upload Picture |   | Picture Size |
| <b>5</b> |                | this library.   | 421 x 344    |
|          |                | Upload Multiple Pictures<br>Upload multiple pictures from your<br>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 . . .

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Basic Functions Picture (Image) Libraries



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

|  | Locate Pictures 🔻 🗙  |
|--|--|
|  |  |
|  | Locate Picture Shortcuts   |
|  | To scan for pictures and<br>automatically add their folders to<br>the Picture Shortcuts list, select a<br>location, and then click OK. |
|  | Look in: Local Disk (C:)   |
|  | Local Disk (C:)<br>DVD/CD-RW Drive (D:)<br>Hauenir on "LCHome01\Users5\$" (H:)   |
| Other Folders Exist  | Gpo_data\$ on 'NetApp (Lcppgfile03)' (K:)<br>Gpo_dept\$ on 'NetApp (Lcppgfile03)' (L:)   |
| The selected locations do not contain nictures to preview. | Pcapps on 'Lcppgfile01' (N:)   |

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• 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.

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| 078912-blue-me  | 1                  | 2                 | abbott_logo_blue |
|-----------------|--------------------|-------------------|------------------|
|                 | 関する。個              |                   |                  |
| men_folder_grey | scn_workflow       | SharePoint Layout | sharepoint_gold  |
| SharePoint      |                    |                   | X                |
| sharepoint_logo | workflows_portrait | wrench_sphere     | wrench_tools     |

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

Formatted: Font: Bold

| sharepoint_logo | ∢ ▶ |                      | 🕮 Back to Locate Pictures   |
|-----------------|-----|----------------------|-----------------------------|
|                 |     | Change Upload Settir | ngs Upload and Close Cancel |

• The Picture Library now contains five uploaded pictures

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## **SharePoint Images and Pictures**

#### All graphics relating to SharePoint are stored in this library. Upload -New • Actions • Settings \* Type Name 078912-blue-metallic-orb-icon-business-tool-wrench1 I NEW 5 abbott logo blue men folder grey I NEW = sharepoint\_golden\_men I NEW = sharepoint logo I NEW 51

### 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

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• Click SharePoint Images and Pictures



| 🔁 Refresh all                 | GPO Pr | rocurem   | ent Home   |                        |
|-------------------------------|--------|-----------|--|------------------------|
| GPO Procurement Home          | Action | ns 🔹      | Settings   Show Related Resources View                 | : Default View 🔻       |
| 🗉 🚟 Pub                       |        | <b>E3</b> | Pages  | 2/28/20                |
| 🕀 🛺 Quality Assurance         |        |           | Please tell us about Sharepoint                        | 2/25/20                |
| 🕀 🛺 Supplier Collaboration    |        | 1111      | Reusable Content                                       | 10/28/2                |
| 🕀 🛺 Supplier Management       |        | <b>EB</b> | Risk Assessment  | 11/16/2                |
| 🕀 🗛 Third Party Manufacturing |        | Ga        | Channel De summer la                                   | 2/2/201                |
| 🕞 🛺 TPM Collaboration         |        |           | Shared Documents                                       | 2/2/201                |
| Announcements                 |        | <b>1</b>  | SharePoint Images and Pictures                         | • 3/1/201              |
| Calendar                      |        | 6         | SharePoint Training Docu /SharePoint Images and Pictur | es/Forms/AllItems.aspx |

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

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#### Site Content and Structure 🗿 Refresh all SharePoint Images and Pictures - All Pictures 🖃 拱 GPO Procurement Home ٠ New • Actions • Settings • Show 3 Up 🕀 🔒 Pub Folder Name ion 🗉 📇 Quality Assurance box Item 078912-blue-metallic-orb-icon-🕢 🔜 upplier Collaboration business-tool-wrench1.png 🕢 🔜 supplier Management 0 abbott\_logo\_blue.JPG 🕢 拱 Third Party Manufacturing 🗉 📇 TPM Collaboration 0 men\_folder\_grey.jpg 🛨 🕵 Announcements 0 sharepoint\_golden\_men.jpg Calendar ± 💷 0 Γ Content and Structure Repo sharepoint\_logo.jpg ±

• In the Upload Document section, click Browse.

| Add Picture: SharePoint Images and Pictures                    |  |           |
|--|--|-----------|
| Upload Document<br>Browse to the picture you intend to upload. | Name:<br>Upload Multiple Files<br>I Overwrite existing files | Browse    |
|  |  | OK Cancel |

- 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.

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#### Basic Functions Picture (Image) Libraries

| Choose File to Upload  | 🕐 🗶 d%20Pictures&Li: 🔽 🍫 🗙 🧗 Live Search   |
|--|--|
| Look in: 🗀 SharePoint 💽 🕓 🥵 🕫 🔛 -  |  |
| Wr Recert       Image: Second Se | Image: Tools → Image: Safety → Tools → Image: Too |
| My Network<br>Places         File name:         SharePoint Layout         Image: Constraint of the places         Op           Files of type:         Fictures (".gif.",ipg.",ipeg.", png)         Image: Constraint of the places         Constraint of the places  | en ne:<br>neel HASharePoint\SharePoint Layout.png Browse   |
|  | Upload Multiple Files<br>Verwrite existing files   |
|  | OK Cancel  |

• Click OK.

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Basic Functions Picture (Image) Libraries

| The document was uploaded st | ccessfully. Use this form to update the properties                              | of the document.  |   |                                     |
|------------------------------|---|---|---|-------------------------------------|
|                              |   |   | ОК  | Cancel                              |
| 🗙 Delete Item   🍄 Spelling   |   |   | * indicates   | a required f                        |
| lame *                       | SharePoint Layout .png  |   |   |                                     |
| Preview                      | Fourierts   | ent<br>Maria and anter<br>Programmer Management<br>Maria and Maria and Maria and Anter<br>Maria and Maria and Anter<br>Maria anter<br>Maria anter<br>Anter<br>Maria anter<br>Anter<br>Maria anter<br>Maria anter<br>Ma | Theorem NORTHHERICANHURLER + 1 by Six Viry Li<br>This Six Supple Versymmetry<br>Stronger and Six<br>Supple Supple Stres | Abbott<br>Abbott<br>Be<br>Be<br>Bar |
|                              | Breat Committe<br>Lake<br>Cannon<br>Tagnifami Evens<br>Bite<br>Pages and Groups | ne signifiant sueris rist. Is dealers i new nom, oor 'new bove.<br>Web Part LEFT<br>Zone 1  | Web Part RI   | GHT<br>ne 1                         |
|                              | Quick Launch Area   | ne "Significent Eventri fait. To owane a new teen, dick "New" above<br>Web Part LEFT<br>Zonne 2   | Web Part Rh<br>Zo   | GHT<br>ne 2                         |
|                              | 4   | Web Part LEFT<br>Zone 3   | Web Part Rit<br>Zo  | GHT<br>ne 3                         |
| Title                        |   |   |   |                                     |
| Date Picture Taken           |   | 00 🔽  |   |                                     |
| Description                  | Used as alternative text for the picture.                                       | ×   |   |                                     |
| Keywords                     |   | <u>×</u>  |   |                                     |
|                              |   | <b>v</b>  |   |                                     |

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

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

### **SharePoint Images and Pictures**

All graphics relating to SharePoint are stored in this library.

| New 🔻 🛛 U | pload 🔹    | Actions •       | Settings •                  |
|-----------|------------|-----------------|-----------------------------|
| Туре      | Name       |                 |                             |
| 2         | 078912-bl  | ue-metallic-orb | -icon-business-tool-wrench1 |
| <b>5</b>  | abbott_log | jo_blue ! NEW   |                             |
| <b>S</b>  | men_folde  | er_grey 🕻 NEW   |                             |
| 2         | SharePoir  | nt Layout ! NEW |                             |
| <b>S</b>  | sharepoint | t_golden_men    | NEW                         |
| <b>1</b>  | sharepoint | t_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

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Basic Functions Picture (Image) Libraries



• Click the **SharePoint Images and Pictures** link.



SharePoint Images and Pictures

 On the <u>Sharepoint Images and Pictures</u> page, click Upload (select either Upload Document or Upload Multiple Documents)

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### SharePoint Images and Pictures All graphics relating to SharePoint are stored in this library. New • Upload Actions • Settings \* Upload Picture Тур Upload a picture from your computer to ch1 🕻 NEW • this library. Upload Multiple Pictures Upload multiple pictures from your computer to this library. SharePoint Layout I NEW sharepoint golden men I NEW sharepoint logo I NEW

• 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 priviledge 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

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Basic Functions Picture (Image) Libraries



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

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# All Site Content

| Ē    | Create                         |
|------|--------------------------------|
|      | Name                           |
| Doc  | ument Libraries                |
| 6    | Documents                      |
|      | Form Templates                 |
| 6    | GPO Terms and Acronyms         |
| 63   | Images                         |
| Pict | ure Libraries                  |
|      | SharePoint Images and Pictures |

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

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Basic Functions Picture (Image) Libraries



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

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# Customize SharePoint Images and Pictures

| List information          | SharePoint Images     | and Dictures   |
|---------------------------|-----------------------|--|
| Web Address               | http://ww00130d-16    | 787/SharePoint Images and Pictures/Forms/AllItems aspx |
| Description:              | All graphics relating | to SharePoint are stored in this library.              |
| General Settings          |                       | Permissions and Management                             |
| Title, description and na | avigation             | Delete this picture library                            |
| Versioning settings       |                       | Save picture library as template                       |
| Advanced settings         |                       | Permissions for this picture library                   |
| Manage item schedulin     | Ig                    | Manage checked out files                               |
| Audience targeting set    | tings                 | 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.

| Message | from webpage   |
|---------|--|
| ?       | This picture library will be removed and all its pictures will be deleted. Are you sure you want to send this picture library to the site Recycle Bin? |
|         | OK Cancel  |

- 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**.

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Basic Functions File Management

### 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
  - o 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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4---

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Basic Functions Restoring A Library Item From The Recycle Bin



- 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.")

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

• The library containing the files is displayed.

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Basic Functions Restoring A Library Item From The Recycle Bin



• 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.

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Basic Functions Restoring A Library Item From The Recycle Bin

| Туре                             | Name                                | Modified   |
|----------------------------------|-------------------------------------|--|
| Ð                                | SharePoint Procedures Part 1 I NEW  | Message from webpage   |
| SharePoint Procedures Part 2 NEW |                                     | <b>9</b>   |
| <b>B</b>                         | SharePoint Procedures Part 3 I NEW  | Are you sure you want to send this item to the site Recycle bin? |
| Ð                                | SharePoint Procedures Part 4 I NEW  | OK Concol  |
| W)                               | Supplier Portal User Guide-training |  |

• 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.

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System Version 1.0 VCR# Basic Functions Restoring A Library Item From The Recycle Bin

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

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Basic Functions Restoring A Library I tem From The Recycle Bin

| Rec  | ycle E   | Bin                                 |                                       |  |  |  |
|--|----------|-------------------------------------|---------------------------------------|--|--|--|
| Use this page to restore items that you have deleted from this site of |          |                                     |                                       |  |  |  |
| Re Re  | store Se | lection   🗙 Delete Selection        |                                       |  |  |  |
| Type Name Original Location  |          |                                     |                                       |  |  |  |
| V  | <b>W</b> | SharePoint Procedures Part<br>1.doc | /SharePoint Training<br>Documentation |  |  |  |

• The Recycle Bin is now empty.

| Recycle                       | e Bin  |                                 |
|-------------------------------|--|---------------------------------|
| Use this pag<br>ago will be a | e to restore items that<br>utomatically emptied. | : you have deleted from this si |
| Restore                       | Selection   🗙 Delet                              | e Selection                     |
| 🗖 Туј                         | oe Name  | Original Location               |
| There are n                   | o items in the recycle                           | b <mark>in.</mark>              |

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

| New  | Upload      Actions      Settings |
|------|-----------------------------------|
| Туре | Name                              |
|      | SharePoint Procedures Part 1 NEW  |
|      | SharePoint Procedures Part 2 NEW  |
|      | SharePoint Procedures Part 3 NEW  |
|      | SharePoint Procedures Part 4      |

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Basic Functions Restoring A Library I tem From The Recycle Bin

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Basic Functions Restoring A Library I tem From The Recycle Bin

| Re                     |   |   |  |          |                 |
|------------------------|---|---|--|----------|-----------------|
|                        | Туре                                      | Name  | Original Location  |          |                 |
| •                      |   | SharePoint Procedures Part<br>1.doc   | /SharePoint Training<br>Documentation                    |          |                 |
| Th                     | e <b>Recy</b>                             | <b>cle Bin</b> is now empty.  |  | <b>↓</b> | Formatted: Bull |
|                        |   |   |  |          |                 |
| Red                    | cycle                                     | Bin   |  |          |                 |
| Red<br>Jse ti<br>Igo w | tis page<br>his page                      | e <b>Bin</b><br>e to restore items that you<br>utomatically emptied.                                | have deleted from this si                                |          |                 |
| Red<br>Ise ti<br>Igo w | cycle<br>his page<br>ill be au<br>Restore | e Bin<br>e to restore items that you<br>utomatically emptied.<br>Selection   X Delete Sel           | have deleted from this si<br>ection                      |          |                 |
| Red<br>Ise ti<br>Igo w | his page<br>ill be au<br>Restore<br>Typ   | e Bin<br>e to restore items that you<br>utomatically emptied.<br>Selection   X Delete Sel<br>e Name | have deleted from this si<br>ection<br>Original Location |          |                 |

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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

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

|             | Left  |           |  | Right  |
|-------------|---|-----------|--|--|
|             | 🔜 Add a Web Part  |           | 🔍 Ad   | d a Web Part   |
|             | Add a Web Part (ope   | ns in new | window) lighlights &   | Events edit + X  |
| Procurement | Vision: Create a world class supplier network<br>Mission: 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. |           | CO PHONE AND CO PH | Test News<br>This is a testing<br>NewsDevelopment<br>Read More |

• 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.

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| ¢ | Add Web Parts Webpage Dialog   | ×        |
|---|--|----------|
|   | Add Web Parts to Left  |          |
| Ľ |  |          |
|   |  |          |
|   | Cists and Libraries  | <b>_</b> |
|   | Announcements<br>Use the Announcements list to post messages on the home page of your site.  |          |
|   | Calendar<br>Use the Calendar list to keep informed of upcoming meetings, deadlines, and other important events.                    |          |
|   | Content and Structure Reports<br>Use the reports list to customize the queries that appear in the Content and Structure Tool views |          |
|   | Documents This system library was created by the Publishing feature to store documents that are used on pages in this site         |          |
|   | EventsCalendar   |          |
|   | FAQ  |          |
|   | Form Templates<br>This library contains administrator-approved form templates that were activated to this site collection.         |          |
|   | GSSIM Event Log  |          |
|   | Images<br>This system library was created by the Publishing feature to store images that are used on pages in this site.           |          |
|   | Links<br>Use the Links list for links to Web pages that your team members will find interesting or useful.                         |          |
|   | News   | •        |
|   |  | •        |
|   | Advanced Web Part gallery and op   | tions    |
|   | Add Cano   | el       |

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

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Basic Functions Web Parts

- Outlook Web Access
- o Search
- o Site Directory
- From the available Web Parts, select the required web part, and click Add.

| Click on Exit Edit Mode            | Formatted: Bullets and Numbering            |
|------------------------------------|---|
|                                    | Formatted: Font: Bold                       |
|                                    | Formatted: Normal                           |
| Site Actions -<br>Exit Edit Mode × | Formatted: Default Paragraph Font,<br>Font: |
| Right                              |   |

### 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.

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Basic Functions Web Parts

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

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

| Left                               |            |                      |          | -               |
|------------------------------------|------------|----------------------|----------|-----------------|
| 🖳 Add a Web Part                   |            |                      |          |                 |
|                                    |            |                      | edit 🔹 🗙 |                 |
|                                    |            | Minimize             | Aissic   | n Web Part Menu |
|                                    |            | Close                |          |                 |
|                                    | ×          | Delete               |          |                 |
|                                    |            | Modify Shared Web Pa | art      |                 |
|                                    |            | Connections          |          |                 |
| Vision: Create a world class suppl | i <b>ć</b> | Export               |          |                 |

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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.

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Basic Functions Web Parts

| GPO Procurement Home<br>Add Web Parts to Left |   |  |  |  |  |
|---|---|--|--|--|--|
| E Lists and                                   | Libraries   |  |  |  |  |
|   | Announcements Use the Announcements list to post messages on the home page of your site.  |  |  |  |  |
|   | Calendar<br>Use the Calendar list to keep informed of upcoming meetings, deadlines, and other important events.                 |  |  |  |  |
|   | Content and Structure Reports Use the reports list to customize the queries that appear in the Content and Structure Tool views |  |  |  |  |
|   | Documents This system library was created by the Publishing feature to store documents that are used on pages in this site.     |  |  |  |  |
|   | EventsCalendar  |  |  |  |  |
|   | FAQ   |  |  |  |  |
| ,   |   |  |  |  |  |
|   | Advanced Web Part gallery and options   |  |  |  |  |
|   | Add Cancel  |  |  |  |  |

- 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

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Basic Functions Web Parts

| Add Web Parts                          |              | ×   |
|--|--------------|-----|
| Browse                                 |              | •   |
| Select the collection you want to brow | wse.         |     |
| Closed Web Parts                       | (16)         |     |
| GPO Procurement Home Gallery           | (98)         |     |
| Server Gallery                         | (0)          |     |
| Web Part List                          |              |     |
| 🤯 Links                                |              |     |
| III News                               |              |     |
| Search Box                             |              |     |
| 🙀 SharePoint List Filter               |              |     |
| SharePoint Training Portal             |              |     |
| Site IUse for formatted text, ta       | bles, and ir | mag |
| Previous 11 to 16 (of 16)              |              |     |
|  |              |     |

• 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.

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• 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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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 <u>SharePoint WWS 3.0</u> \_\_\_\_\_\_ Deleted: <u>Announcements</u> <u>Training Tutorials</u> web part.

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

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Basic Functions Web Parts



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| <b>Basic Functions</b> |  |  |  |  |
|------------------------|--|--|--|--|
| Web Parts              |  |  |  |  |

|                       | edit 🔻                 | х |
|-----------------------|------------------------|---|
|                       | Minimize               |   |
|                       | Close                  |   |
| $\boldsymbol{\times}$ | Delete                 | ; |
|                       | Modify Shared Web Part |   |
|                       | Connections            |   |
|                       | Export                 |   |

- 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 | Formatted: Bullets2   |  |
|-------------------------------|-----------------------|--|
|                               | Formatted: Font: Bold |  |

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Abbott Laboratories – Global Pharmaceutical Operations (GPO – IT)



Basic Functions Web Parts

| A SharePoint Training Portal                                  | ×  |
|---|----|
| Content Editor  | \$ |
| Content Editor  |    |
| To enter formatted text and graphics, click Rich Text Editor. |    |
| Rich Text Editor  |    |
| To type HTML source code, click Source Editor.                |    |
| Source Editor   |    |
| Content Link  |    |
| To link to a text file, type a URL.                           |    |
| <br>Test Link   |    |
| + Appearance  |    |
| Layout  |    |
| Advanced  |    |
|   |    |
|   |    |
|   |    |
|   |    |
|   |    |
|   |    |
|   |    |
|   |    |
|   |    |
| OK Cancel Apply   |    |

• Edit the properties to <u>be changed</u>. Properties specific to a Web Part appear at the top <u>section of the editor dialogue box</u>. Deleted: that you want

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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.

| I Mission  | х | * |
|--|---|---|
| Content Editor   | * |   |
| Content Editor<br>To enter formatted text and graphics, click<br>Rich Text Editor. |   |   |
| Rich Text Editor   |   |   |
| To type HTML source code, click Source<br>Editor.                                  |   |   |
| Source Editor  |   |   |
| Content Link   |   |   |
| To link to a text file, type a URL.  |   |   |
|  |   |   |
| Test Link  |   |   |
| + Appearance   |   |   |
| Layout   |   |   |
| + Advanced   |   |   |

- 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 <u>slightly</u> different <u>from</u> 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.

Deleted: than

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| px solid; BORDER-LEFT: 0px solid; BORDER-TOP: 0px solid; BORDER-RIGHT: 0px solid"<br>border=0 src="http://ww00130d:16787/PublishingImages/image61079_61795.png"><br><p dir="ltr&lt;br" style="MARGIN-RIGHT: 0px">align=right&gt;</p> |
|--|
|--|

  

| <th style="TEXT-ALIGN: left" width="100%"><br/><p><span style="FONT-SIZE: large">Vision:</span>  Create a world class supplier<br/>network<br/><br/><span style="FONT-SIZE: large">Mission: </span>To improve patients<br/>lives by ensuring global supply<br/>of high-quality sourced goods and services through<br/>relationship<br/>management and targeting the lowest total cost of ownership</p></th> | <br><p><span style="FONT-SIZE: large">Vision:</span>  Create a world class supplier<br/>network<br/><br/><span style="FONT-SIZE: large">Mission: </span>To improve patients<br/>lives by ensuring global supply<br/>of high-quality sourced goods and services through<br/>relationship<br/>management and targeting the lowest total cost of ownership</p> |
|---|---|
|   |   |
| <pre> <p class="O" style="TEXT-ALIGN: left; MARGIN: 0px; mso-kinsoku-overflow: 1; mso-char-wrap: 1; mso-&lt;br&gt;line-spacing: 100 0 50" v:shape="_x0000_s3074"> </p><br/><div></div></pre>  |   |
| <div style="TEXT-ALIGN: right">  </div><br>   |   |
| <div style="TEXT-ALIGN: right">   </div>  |   |
|   |   |
|   |   |

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

|                | Site Actions -   |
|----------------|------------------|
|                | Exit Edit Mode 🗙 |
| Right          |                  |
| 🛄 Add a Web Pa | art              |



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

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### 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 .



| Formatted: F | ont: Not Bold        |
|--------------|----------------------|
| Formatted: F | ont: Bold            |
| Formatted: B | ullets and Numbering |
| Formatted: F | ont: Not Bold        |
| Formatted: F | ont: Bold            |
| Formatted: F | ont: Bold            |
| Formatted: F | ont: Bold            |

• In the content editor, click on Source Editor.

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| SharePoint Training Portal   | ×              |                                       |                               |
|--|----------------|---------------------------------------|-------------------------------|
| Content Editor   | *              |                                       |                               |
| Content Editor   |                |                                       |                               |
| To enter formatted text and graphics, click Rich Text Editor.                      |                |                                       |                               |
| Rich Text Editor   |                |                                       |                               |
| To type HTML source code, click Source Editor.                                     |                |                                       |                               |
| Source Editor  |                |                                       |                               |
| If this is only to insort and/or delate HTML and a make                            | the changes    | directly in                           | Deleted: simply a modificatio |
| the code   |                |                                       | Deleted: ,                    |
| If this is to create a new web part, anter all the LITM                            | aada           |                                       | Deleted: /                    |
|  | code.          |                                       | Deleted: the appropriate      |
| Normal HTML structure is:  |                | · · · · · · · · · · · · · · · · · · · | Deleted: appropriate          |
| HTML><br><head><br/><title>The document title</title><br/></head><br><body></body> |                |                                       |                               |
| <br>/HTML>   |                |                                       |                               |
| The <b>Source Editor</b> only requires the code that is loca                       | ited between t | the BODY                              |                               |
| togo   |                | -                                     |                               |

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

Formatted: Bullets and Numbering
Formatted: Font: Bold

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**Basic Functions** Web Parts

# 🖉 Text Entry -- Webpage Dialog

| Text   | Entry Webpage Dialog   |                      |                | X |
|--|--|----------------------|----------------|---|
|  |  |                      |                | 1 |
| <ta< td=""><td>ble cellpadding=10 cellspacing=0&gt;</td><td></td><td><u> </u></td><td></td></ta<>  | ble cellpadding=10 cellspacing=0>  |                      | <u> </u>       |   |
|  |  |                      |                |   |
| <td< td=""><td>&gt;</td><td></td><td></td><td></td></td<>  | >  |                      |                |   |
|  | <img src="http://ww00130d:16787&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;/Pu&lt;/td&gt;&lt;td&gt;olishingImages/sharepoint_golden_men.jpg"/>  |                      |                |   |
| <td< td=""><td>&gt;</td><td></td><td></td><td></td></td<>  | >  |                      |                |   |
| <b><br/><br/><br/><br/><br/><br/><br/><b< td=""><td> </td><td></td><td></td><td></td></b<></b>   |  |                      |                |   |
| <p< td=""><td>align=center&gt;<font align="center" face="Arial" size="4"><b>5</b></font></td><td>SharePoint W</td><td>/WS 3.0</td><td></td></p<> | align=center> <font align="center" face="Arial" size="4"><b>5</b></font>   | SharePoint W         | /WS 3.0        |   |
| Trai   | ning Tutorials   |                      |                |   |
|  | <font size="2"><b>A comprehensive guide to all your Shar</b></font>  | ePoint requirement   | s. These       |   |
| tuto   | rials cover  |                      |                |   |
| <ul><li><ul></ul></li></ul>  | ,  |                      |                |   |
| <li></li>  | general SharePoint information   |                      |                |   |
| <i><i><i><i><i><i><i><i><i><i><i><i><i>&lt;</i></i></i></i></i></i></i></i></i></i></i></i></i>  | project specific information   |                      |                |   |
| <td>&gt;</td> <td></td> <td></td> <td></td>  | >  |                      |                |   |
| This   | is a sample link to the <a href="http://ww00130d:16787/&lt;/td&gt;&lt;td&gt;SharePoint%20Trai&lt;/td&gt;&lt;td&gt;ning%20&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;Doc&lt;/td&gt;&lt;td&gt;umentation/Forms/AllItems.aspx" target="_blank">Sharel</a> | Point Documentatio   | on Library AND |   |
| the  | proposed SharePoint courses.   |                      |                |   |
| This   | is where all SharePoint training materials will be located.  | This includes CB     | T materials as |   |
| wel  | as user guides.  |                      |                |   |
| <td>&gt;</td> <td></td> <td></td> <td></td>  | >  |                      |                |   |
| <td>&gt;</td> <td></td> <td></td> <td></td>  | >  |                      |                |   |
|  | <font size="2"><b></b></font>  |                      |                |   |
| The  | following is a guick link to the <a blank"="" href="http://ww00130d:1&lt;/td&gt;&lt;td&gt;16787&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;J&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;/ ci&lt;/td&gt;&lt;td&gt;ıtalogs/lt/Forms/AllItems.aspx" target="">List Temı</a>       | olate Gallery w      | here all GPO   |   |
| Pro  | curement templates are stored. NOTE: This link will not be   | e available on the p | roduction      |   |
| web  | site.  |                      |                | 1 |
| -14-   | · · · r<br>\$  |                      | <u> </u>       | 1 |
|  |  |                      |                | 1 |
|  |  | Save                 | Cancel         |   |

- If the Rich Text Editor is used at any point, the changed or added code will revert to Microsoft HTML.
- Click Save to close the Source Editor window. •
- Click **OK** on the Content Editor. .
- Click Exit Edit Mode ٠

Formatted: Bullets and Numbering Formatted: Font: Bold Formatted: Normal

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| Supplier Portal<br>System Version 1.0<br>VCR# | Abbott Laboratories – Global Pharmaceutical Operations (GPO – IT)<br>Ba | asic Functions<br>Web Parts |
|---|---|-----------------------------|
|   | Site Actions -  | Formatted: Image            |
|   | Exit Edit Mode ×  |                             |
|   | Right   | ≪'                          |
|   | Add a Web Part  |                             |
|   |   | Formatted: Normal           |

# 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:
  - AppearanceLayoutAdvanced

Appearance

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| <b>Basic Functions</b> |
|------------------------|
| Web Parts              |

| Appearance                               |
|--|
| Title                                    |
| Mission                                  |
| Height                                   |
| Should the Web Part have a fixed height? |
| C Yes Pixels 💌                           |
| No. Adjust height to fit zone.           |
| Width                                    |
| Should the Web Part have a fixed width?  |
| C Yes Pixels 💌                           |
| No. Adjust width to fit zone.            |
| Chrome State                             |
| C Minimized                              |
| Normal                                   |
| Chrome Type                              |
| Title and Border                         |

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

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| Height          | Specifies the height of the Web Part.   |
|-----------------|---|
| Width           | Specifies the width of the Web Part.  |
| Chrome<br>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 <b>Normal</b> and the entire Web Part appears. Only the title bar appears when the state is set to <b>Minimized</b> . |
| Chrome<br>Type  | Specifies whether the title bar and border of the Web Part frame are displayed.   |

# Layout

| Layout     |
|------------|
| Hidden     |
| Direction  |
| None       |
| Zone       |
| Left 💌     |
| Zone Index |
| 1          |
| + Advanced |

| 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 <b>(Hidden)</b> 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.  |

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| Direction | Specifies the direction of the text in the Web Part content. For example, Arabic is a right-to-<br>language; English and most other European languages are left-to-right languages. This set<br>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.<br>Zones on the Web Part Page are not listed in the list box when there is no permission to modify<br>the zone.   |  |
| Zone      | Specifies the position of the Web Part in a zone when the zone contains more than one Web<br>Part.<br>To specify the order, type a positive integer in the text box.<br>If the Web Parts in the zone are ordered from top to bottom, a value of 1 means that the Web<br>Part appears at the top of the zone. If the Web Parts in the zone are ordered from left to right, a                            |  |
| Index     | value of 1 means that the Web Part appears on the left of the zone.<br>For example, to add a Web Part to an empty zone that is ordered from top to bottom, the Zone<br>Index is <b>0</b> . When adding a second Web Part to the bottom of the zone, its Zone Index is <b>1</b> . To<br>move the second Web Part to the top of the zone, type <b>0</b> , and then type <b>1</b> 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

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Basic Functions Web Parts

| 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 IIRI                              |
|  |
| Hala Mada                              |
| Modeless -                             |
|  |
| / lavouts/images/mscontl.gif           |
|  |
|  |
|  |
| Import Error Message                   |
|  |
| Target Audiences                       |
|  |
| OK Cancel Apply                        |
| Cit Cancel Apply                       |

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| 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<br>Change  | Specifies whether the Web Part can be moved to a different zone.  |  |
| Allow<br>Connections  | Specifies whether the Web Part can participate in connections with other Web Parts.   |  |
| Allow Editing in<br>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 <b>Search</b> command on the <b>Find Web Parts</b> 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 <b>Help</b> 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 of user must close the window before returning to the Web page.         Help Mode       Modeless Opens a separate browser window, if the browser has the default value. |   |  |
|   | Navigate Opens the web page in the current browser window.  |  |

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| Catalog Icon<br>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<br>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
  - o Create Column
  - o Create View
  - o Document Library Settings
  - o Manage Workflow
  - Create Workflow
- Select **Document Library Settings**. All modifications may be performed in this location.



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Basic Functions Customize a Library

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

o General Settings

#### General Settings

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

#### o Permissions and Management

#### **Permissions and Management**

- Delete this document library
- Save document library as template
- Permissions for this document library
- Manage checked out files
- Workflow settings
- Information management policy settings

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Basic Functions Customize a Library

# o Communications



o Columns

| Columns                     |                                  |                         |  |  |
|-----------------------------|----------------------------------|-------------------------|--|--|
| A column stores information | about each document in the docun | nent library. The follo |  |  |
| Column (click to edit)      | Туре                             | 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 colu | mns                              |                         |  |  |
| Column ordering             |                                  |                         |  |  |
| Indexed columns             |                                  |                         |  |  |

o Views

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Supplier Portal System Version 1.0 VCR#

Default View

~

### Views

A view of a document library allows you to see a particular selection of items or to see the configured for this document library:

View (click to edit)

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

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| Shar     | SharePoint Training Documentation                                  |    |                               |  |
|----------|--|----|-------------------------------|--|
| This lil | This library contains all the Sharepoint training material for GPO |    |                               |  |
| New      | ▼ Upload ▼ Actions ▼ Settings ▼                                    |    |                               |  |
| Туре     | Name   |    |                               |  |
| <b>W</b> | SharePoint Procedures Part 1 NEW                                   |    | <b>•</b>                      |  |
| P        | SharePoint Procedures Part 2 ! NEW                                 |    | View Properties               |  |
| PP)      | SharePoint Procedures Part 3 I NEW Edit Properties                 |    | Edit Properties               |  |
| P)       | SharePoint Procedures Part 4 I NEW                                 | 9  | Manage Permissions            |  |
| _        |  | •  | Edit in Microsoft Office Word |  |
|          |  | ×  | Delete                        |  |
|          |  |    | Send To                       |  |
|          | Check Out  |    | Check Out                     |  |
|          | 🎸 Workflows  |    | Workflows                     |  |
|          |  | 8  | View Workflow History         |  |
|          |  | ~~ | Schedule Workflows            |  |
|          | Alert Me പ്രിഎ   |    |                               |  |
|          |  |    |                               |  |

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

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| New Alert   |  |        |
|---|--|--------|
| Use this page to create an e-mail alert notifying y<br>View my existing alerts on this site.  | /ou when there are changes to the specified item, document, list, or library.                            |        |
|   | ОК   | Cancel |
| Alert Title<br>Enter the title for this alert. This is included<br>in the subject of the e-mail notification sent<br>for this alert.                          | SharePoint Training Documentation: Shar  |        |
| Send Alerts To  | Users  |        |
| You can enter user names or e-mail addresses. Separate them with semicolons.  |  |        |
|   |  | 8,/ 🔟  |
| Send Alerts for These Changes   | Send me an alert when:   |        |
| Specify whether to filter alerts based on<br>specific criteria. You may also restrict your<br>alerts to only include items that show in a<br>particular view. | <ul> <li>Anything changes</li> <li>Someone else changes a document</li> </ul>                            |        |
|   | C Someone else changes a document created by me<br>C Someone else changes a document last modified by me |        |
| When to Send Alerts   |  |        |
| Specify how frequently you want to be alerted.  | <ul> <li>Send e-mail immediately</li> <li>Send a daily summary</li> <li>Send a weekly summary</li> </ul> |        |
|   | Time:<br>Wednesday 💌 4:00 PM 💌   |        |
|   | ОК   | 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.

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Basic Functions Email Alerts

| My A                | Alerts on this Site   |
|---------------------|---|
| Use this<br>generat | s page to manage the list of libraries, files, lists, and items for which you receive alerts. Note that some alerts, such as system<br>ed task alerts, do not appear on this page. Click the name of an alert to edit its settings. |
| 🛋 Ad                | d Alert   🗙 Delete Selected Alerts  |
| Alert Tr            | tle   |
| Freque              | ency: Immediate   |
|                     | SharePoint Training Documentation   |
|                     |   |

#### 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:

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- 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
  - $\circ \quad \text{Items are deleted} \quad$
  - 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
  - o Someone else changes a document created by me
  - o Someone else changes a document last modified by me
- Select when the alert email must be sent:
  - o immediately
  - o **daily**: enter the desired time
  - o 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.

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Supplier Portal System Version 1.0 VCR# Basic Functions Email Alerts

| New Alert  |   |
|--|---|
| Use this page to create an e-mail alert notifying<br>View my existing alerts on this site.   | you when there are changes to the specified item, document, list, or library.   |
| Alert Title<br>Enter the title for this alert. This is included<br>in the subject of the e-mail notification sent<br>for this alert.   | OK Cancel   |
| Send Alerts To<br>You can enter user names or e-mail<br>addresses. Separate them with semicolons.  | Users:<br>NORTHAMERICA\HAUENLR  |
| Change Type<br>Specify the type of changes that you want<br>to be alerted to.  | Only send me alerts when:<br>All changes<br>New items are added<br>Existing items are modified<br>Items are deleted<br>Web discussion updates   |
| Send Alerts for These Changes<br>Specify whether to filter alerts based on<br>specific criteria. You may also restrict your<br>alerts to only include items that show in a<br>particular view. | Send me an alert when:<br>Anything changes<br>Someone else changes a document<br>Someone else changes a document created by me<br>Someone else changes a document last modified by me |
| When to Send Alerts<br>Specify how frequently you want to be<br>alerted.   | <ul> <li>Send e-mail immediately</li> <li>Send a daily summary</li> <li>Send a weekly summary</li> <li>Time:</li> <li>Wednesday</li></ul>   |
|  | OK Cancel   |

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Basic Functions Version Control

## 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

#### **SharePoint Training Documentation**



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Basic Functions Version Control

# • In the General Settings area, select Versioning settings

| List Information      |                     |  |
|-----------------------|---------------------|--|
| Name:                 | SharePoint Trainin  | ng Documentation   |
| Web Address:          | http://ww00130d     | 16787/SharePoint Training Documentation/Forms/AllItems.asp |
| Description:          | This library consis | sts of all available GPO SharePoint training materials.    |
| General Settings      |                     | Permissions and Management                                 |
| Title, description ar | nd navigation       | Delete this document library                               |
| Versioning setting    | lm                  | Save document library as template                          |
| Advanced settings     |                     | Permissions for this document library                      |
| Manage item sched     | duling              | Manage checked out files                                   |
| Audience targeting    | settings            | Workflow 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**.

| GPO Procurement Home > SharePoint Training Documentation > Settings > Versioning Settings: Document Library Versioning Settings: SharePoint Training Document Library Versioning Settings: SharePoint Training Document Library Versioning Settings > Versioning Setting | ocumentation  |
|--|---|
| Content Approval<br>Specify whether new items or changes to existing items should remain in a draft state until they have<br>been approved. Learn about requiring approval.  | Require content approval for submitted items?<br>C Yes • No |

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

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Basic Functions Version Control

| Document Version History   | Create a version each time you edit a file in this document |
|--|---|
| Specify whether a version is created each time you edit a file in this document library. Learn about | library?  |
| versions.  | O No versioning   |
|  | C Create major versions                                     |
|  | Example: 1, 2, 3, 4   |
|  | C 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:   |
|  |   |
|  |   |

- No versioning
- Create major versions (e.g. Version 1, Version 2, etc.). Also, indicate the number of revised versions to keep.
- 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 privaleges.
  - Only users who can approve items or the originator of the item.

| Draft Item Security  | Who should see draft items in this document library?                              |
|--|---|
| Drafts are minor versions or items which have not been approved. Specify which users should be able to | Any user who can read items   |
| view draits in this document library. Learn about specifying who can view and edit draits.             | Only users who can edit items   |
|  | <ul> <li>Only users who can approve items (and the author of the item)</li> </ul> |

- 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  | Require documents to be checked out before they can be |
|--|--|
| Specify whether users must check out documents before making changes in this document library. | edited?  |
| Learn about requiring check out.   | O Yes O No   |
|  | OK Cancel  |

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Basic Functions Version Control

#### 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

| 3        | Issue Log                                  |   | View Properties               |
|----------|--|---|-------------------------------|
| W)       | PM01 - Meeting Agenda _ Minutes Template   |   | Edit Properties               |
|          | PM02 - Agenda Template                     | 4 | Manage Permissions            |
| W)       | PM03 - Meeting Minutes Template            | • | Edit in Microsoft Office Word |
| M)       | PM04 - Project Charter Template            | × | Delete                        |
| <b>P</b> | PM05 - Scope Statement Template            |   | Send To                       |
|          | PM05.5 - Deliverable Expectations Template | b | Check Out                     |
| 3        | PM06 - Communications Plan Template 1      | 2 | Version History               |
|          | PM07 - Communications Plan Template 2      | ۷ | Workflows                     |
| ×)       | PM08 - RACI Template                       | & | View Workflow History         |
| <b>W</b> | PM09 - Risk Assessment Log Template        | ~ | Schedule Workflows            |
| P)       | PM10 - Project Change Request Template     |   | Alert Me                      |
|          |  |   |                               |

• 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):

| This li | brary consists of all available GPO Shar |     | View Properties               |
|---------|--|-----|-------------------------------|
| New     | Upload      Actions      Settings        |     | Edit Properties               |
| Туре    | Name                                     | 4,  | Manage Permissions            |
|         | Latest Revised User Guide                | Ð   | Edit in Microsoft Office Word |
|         | SharePoint Procedures Part 1             | ×   | Delete                        |
|         | SharePoint Procedures Part 2             |     | Send To                       |
|         | SharePoint Procedures Part 3             | Da. | Check Out                     |
|         | SharePoint Procedures Part 4             | Ŵ   | Workflows                     |
|         |  | 2   | View Workflow History         |
|         |  | 83  | Schedule Workflows            |
|         |  |     | Alert Me                      |

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• 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.

| Versi     | Versions saved for SharePoint Procedures Part 2.doc |   |         |          |  |  |  |
|-----------|---|---|---------|----------|--|--|--|
| All versi | ons of this document are listed below v             | vith the new value of any changed properties. |         |          |  |  |  |
| Delete A  | All Versions   Delete Minor Versions                |   | 19150-0 |          |  |  |  |
| 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 t | he current published major version                  |   |         |          |  |  |  |
| 1.0       | 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.

| Versi      | ons saved for Share                  | Point Pro      | cedures Part 2.doc               |  |  |
|------------|--------------------------------------|----------------|----------------------------------|--|--|
| All versio | ons of this document are listed belo | w with the new | value of any changed properties. |  |  |
| Delete A   | All Versions   Delete Minor Version  | s              |                                  |  |  |
| 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                    | View           | Hauenstein, Rick R               |  |  |
| This is t  | the current published major vers     | Restore        |                                  |  |  |
| 1.0        | 1/27/2011 2:06 PM                    | Delete Jhn     | Hauenstein, Rick R               |  |  |
|            | Title Meeting Age                    | nda            |                                  |  |  |

• 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:

o View

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- **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.

| Sha      | SharePoint Training Documentation   |              |   |        |                               |                   |                   |  |  |  |  |  |  |
|----------|---|--------------|---|--------|-------------------------------|-------------------|-------------------|--|--|--|--|--|--|
| This li  | This library consists of all available GPO SharePoint training materials. |              |   |        |                               |                   |                   |  |  |  |  |  |  |
| New      | New  Veload  Actions  Settings  |              |   |        |                               |                   |                   |  |  |  |  |  |  |
| Туре     | Name  |              |   |        | View Properties               |                   | Modified          |  |  |  |  |  |  |
|          | Latest Revised U  | ser Guide    |   |        | Edit Properties               |                   | 1/24/2011 4:35 PM |  |  |  |  |  |  |
| <b>P</b> | SharePoint Proce  | dures Part 1 |   | 45     | Manage Permissions            |                   | 1/24/2011 4:35 PM |  |  |  |  |  |  |
| <b>P</b> | SharePoint Procedures Part 2  |              |   | •      | Edit in Microsoft Office Word | I                 | 1/27/2011 2:16 PM |  |  |  |  |  |  |
| <b>P</b> | SharePoint Procedures Part 3  |              | × | Delete |                               | 1/24/2011 4:35 PM |                   |  |  |  |  |  |  |
| <b>P</b> | SharePoint Proce  | dures Part 4 |   |        | Send To                       | ·                 | 1/24/2011 4:35 PM |  |  |  |  |  |  |
|          |   |              |   | D      | Check Out                     |                   |                   |  |  |  |  |  |  |
|          |   |              |   | ۵Ì     | Publish a Major Version day   |                   |                   |  |  |  |  |  |  |
|          |   |              |   | N      | Version History               |                   |                   |  |  |  |  |  |  |
|          |   |              |   | Ì      | Workflows                     |                   |                   |  |  |  |  |  |  |
|          |   |              |   | 2      | View Workflow History         |                   |                   |  |  |  |  |  |  |
|          |   |              |   | 83     | Schedule Workflows            |                   |                   |  |  |  |  |  |  |
|          | Alert Me  |              |   |        |                               |                   |                   |  |  |  |  |  |  |
|          |   |              |   |        |                               |                   |                   |  |  |  |  |  |  |

- Hover the cursor over any of the other versions. The user has the option to View, Restore, Delete
  - o 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.

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Basic Functions Surveys

#### 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

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VCR#

| Create                             |   |   |                               |
|------------------------------------|---|---|-------------------------------|
| Create a surv<br>to quickly create | ey when you want to poll other<br>ate questions and define how us<br>Communications | Web site users. Surveys provide fe<br>sers specify their answers. | atures that allow you         |
| Librarios                          | Communications  | Hunning   |                               |
| Document Library                   | Announcements   | Links   | Custom List                   |
| Form Library                       | Contacts  | Calendar  | Custom List in Datasheet View |
| Wiki Page Library                  | Discussion Board  | Tasks   | Languages and Translators     |
| Picture Library                    |   | Project Tasks   | KPI List                      |
| Data Connection Library            | /   | Issue Tracking  | Lot Performance               |
| Translation Management             | t   | <sup>a</sup> <u>Survey</u> վեր                                    | SignificantEvents             |
| Library                            |   | GAP Assessment Survey   | Incident Types                |
| Report Library                     |   | SRM Suppliers and   | ExceptionReport               |
| Slide Library                      |   | Governance Teams Links  | Open Items Log                |
|                                    |   |   | Supplier Change Notification  |

- On the "New" page, complete the questionnaire details: •
  - **Name** of the survey / **Description** of the survey
  - o 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.
  - o 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

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| Supplier Portal    |
|--------------------|
| System Version 1.0 |
| VCR#               |

| lame and Description  |   |
|---|---|
| Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text<br>hat will help site visitors use this survey. | ACME  |
|   | Description:  |
|   | Selected survey questions for the ACME Corporation        |
| lavigation  |   |
| specify whether a link to this survey appears in the Quick Launch.  | Display this survey on the Quick Launch?     Yes     O No |
| urvey Options   | Show user names in survey results?                        |
| pecify whether users' names will appear in survey results and whether users can respond to the same<br>urvey multiple times.                              | C Yes 📀 No  |
|   | Allow multiple responses?                                 |

- 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")

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Supplier Portal System Version 1.0 VCR#

| Use this page to edit a question of this survey.  |  |
|---|--|
| Question and Type                                 | Question:  |
| Type your question and select the type of answer. | For How Long has your company been using ACME Corporation as a supplier? |
|   | The type of answer to this question is:                                  |
|   | C Single line of text  |
|   | C Multiple lines of text   |
|   | Choice (menu to choose from)   |
|   | C Number (1, 1.0, 100)   |
|   | C Currency (\$, ¥, €)  |
|   | C Date and Time  |

| Additional Question Settings                                     | Require a response to this question:   |
|--|--|
| Specify detailed options for the type of answer you<br>selected. | O Yes 💿 No   |
|  | Type each choice on a separate line:   |
|  | 1 year to 2 years<br>More than 2 years up to 3 years<br>More than 3 years up to 4 years<br>More than 4 years up to 5 years |
|  | <u> </u>   |
|  | Display choices using:   |
|  | O Drop-Down Menu   |
|  | O Radio Buttons  |
|  | C Checkboxes (allow multiple selections)   |
|  | Allow 'Fill-in' choices:   |
|  | O Yes 💿 No   |
|  | Default value:   |
|  | Choice C Calculated Value  |
|  | Less than 1 year   |

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

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

| Specify if branching is enabled for this question. Branching can be used<br>to skip to a specific question based on the user response. A page break<br>is automatically inserted after a branching enabled question. Learn about<br>branching. | To define branching logic, add<br>questions to define the branch | your questions and then, in ing logic. | n the Survey Settin | gs page, edit the |
|--|--|--|---------------------|-------------------|
|  |  | Next Question                          | Finish              | Cancel            |

- 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     |                   |           |   | Finish | Cancel |
|--|-----------------|-------------------|-----------|---|--------|--------|
| For How Long has your company been                               | n using ACME Co | prporation as a s | supplier? |   |        |        |
| Less than 1 year   |                 |                   |           |   |        |        |
| How would you rate their overall prod                            | uct quality?    |                   |           |   |        |        |
|  | Low             |                   | Average   |   | High   |        |
|  | 1               | 2                 | 3         | 4 | 5      | N/A    |
| Product conforms to your quality<br>specifications.              | 0               | 0                 | 0         | 0 | 0      | o      |
| Satisfies customers' preferences<br>and expectations.            | 0               | 0                 | 0         | 0 | 0      | 0      |
| Minimize retesting or replacing the product.                     | 0               | 0                 | 0         | 0 | 0      | 0      |
| How would you rate their customer s                              | ervice?         |                   |           |   |        |        |
|  | Low             |                   | Average   |   | High   |        |
|  | 1               | 2                 | 3         | 4 | 5      | N/A    |
| Timely feedback on problems.                                     | 0               | 0                 | 0         | 0 | 0      | 0      |
| Customer Care Reps are<br>knowledgeable concerning the<br>issue. | 0               | 0                 | 0         | 0 | 0      | 0      |
| Customer Care Reps understand the issues.                        | 0               | 0                 | 0         | 0 | 0      | C      |

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| How does ACME respond when a complaint is filed.  |  |  |  |  |  |  |  |   |     |
|---|--|--|--|--|--|--|--|---|-----|
| <ul> <li>○ No response</li> <li>○ Requires multiple calls.</li> <li>○ Respond immediately but they address the issue at a later date</li> </ul> |  |  |  |  |  |  |  |   |     |
|   |  |  |  |  |  |  |  | C Respond immediately and works out a response plan to solve the problem.                   |     |
|   |  |  |  |  |  |  |  | Is ACME Corporation price competive when compared with suppliers of the same/similar produ- | ct? |
| C Yes   |  |  |  |  |  |  |  |   |     |
| O No  |  |  |  |  |  |  |  |   |     |
| O Somewhat competitive.   |  |  |  |  |  |  |  |   |     |
| C Not competitive at all  |  |  |  |  |  |  |  |   |     |
| Does ACME operate any Vendor Managed Inventory (VMI) / ship to stock programs?  |  |  |  |  |  |  |  |   |     |
| C Yes   |  |  |  |  |  |  |  |   |     |
| O No  |  |  |  |  |  |  |  |   |     |
| O Do not know   |  |  |  |  |  |  |  |   |     |

| Does ACME provide cost saving initiatives to reduce cost base year on year? |        |        |
|---|--------|--------|
| C Yes   |        |        |
| O No  |        |        |
| C Do not know   |        |        |
| Please comment about this supplier  | Einink | Canaal |
|   | Finish | Cancel |

# 2.10.2. Edit Survey

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

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| Surveys                        |  |    |             |
|--------------------------------|--|----|-------------|
| ACME Surality                  | 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 A  | Selected survey questions for the ACME Corporation |                    |                                  |   |  |  |  |
| Respond to this Survey Actions   | •  | Setting            | s 🔻                              |   |  |  |  |
| Survey Name:   | AC   |                    | Add<br>Add                       | I Questions<br>an additional question to this<br>rev. |  |  |  |
| Survey Description:  | Se   |                    | Sur                              | vev Settings  |  |  |  |
| Time Created:  | 2/1  | Managehyestions an | Manage westions and settings for |   |  |  |  |
| Number of Responses:   | 10   | <u> </u>           | this                             | suri <del>c</del> y.                                  |  |  |  |
| <ul> <li>Show a graphical summary of respon</li> <li>Show all responses</li> </ul> | ses  |                    |                                  |   |  |  |  |

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

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

| GPO Procurement Home > Supplier Collabora<br>Edit Question: ACME Survey | tion > ACME Survey > Settings > Edit Question                            |
|---|--|
| Use this page to edit a question of this survey.                        |  |
| Question and Type   | Question:  |
| Type your question and select the type of answer.                       | For How Long has your company been using ACME Corporation as a supplier? |
|   | The type of answer to this question is:                                  |
|   | C Single line of text  |
|   | C Multiple lines of text   |
|   | Choice (menu to choose from)   |
|   | O Number (1, 1.0, 100)   |
|   | C Currency (\$, ¥, €)  |
|   | O 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

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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**.

| Branching Logic<br>Specify if branching is enabled for this question.<br>Branching can be used to skip to a specific<br>question based on the user response. A page<br>break is automatically inserted after a branching<br>enabled question. Learn about branching. | Possible<br>Choices     Jump To       Less than 1<br>year     No Branching       1 year to 2<br>years     No Branching       More than 2<br>years up to<br>3 years     No Branching       More than 3<br>years up to<br>4 years     No Branching       More than 4<br>years up to<br>5 years     No Branching       Over 5<br>years     No Branching | ×<br>×<br>× |
|--|--|-------------|
|  | Delete OK  | Cancel      |

- 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

| year?   |                        |
|---|------------------------|
| Please comment about this supplier  | Multiple lines of text |
| <ul> <li>Add a question</li> <li>Change the order of the questions</li> </ul> |                        |

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

|   | Add a question                   |
|---|----------------------------------|
| • | Change the order of the question |

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| Use this page to change the order of the questions.   |  |        |  |  |  |
|---|--|--------|--|--|--|
| Question Order  | Question Name Position fr  | om Toi |  |  |  |
| choose the order of the questions by selecting a number for each question under<br>Position from Top".                                  | For How Long has your company been using ACME<br>Corporation as a supplier?                      | 1      |  |  |  |
| Changing the order of questions that are involved in branching may reset some of the<br>defined branching logic. Learn about branching. | How would you rate their overall product quality?  |        |  |  |  |
|   | How would you rate their customer service?   |        |  |  |  |
|   | How does ACME respond when a complaint is filed.   |        |  |  |  |
|   | Is ACME Corporation price competive when compared with<br>suppliers of the same/similar product? | 5 -    |  |  |  |
|   | Does ACME operate any Vendor Managed Inventory (VMI) /<br>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 -    |  |  |  |

• 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.

| GPO PROCUREMENT HOME | SUPPLIER MANAGEMENT | THIRD PARTY MANUFACTURING | PURCHASING | QUALITY ASSURANCE 🗢 | EXTERNAL SITES 🔻         |
|----------------------|---------------------|---------------------------|------------|---------------------|--------------------------|
|                      |                     |                           |            |                     |                          |
| Mission              |                     |                           |            |                     | TPM COLLABORATION hlight |

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Basic Functions Surveys





Show all responses

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Cancel

Finish

# ACME: Respond to this Survey

| For How Long has | your company | y been using | ACME as a : | supplier? |
|------------------|--------------|--------------|-------------|-----------|

|             |      | _ |
|-------------|------|---|
| Less than 1 | year | • |

How would you rate their overall product quality?

|   | Low     |   | Average |   | High |     |
|---|---------|---|---------|---|------|-----|
|   | 1       | 2 | 3       | 4 | 5    | N/A |
| Product conforms to your quality<br>specifications.   | 0       | 0 | 0       | o | 0    | 0   |
| Satisfies customers' preferences<br>and expectations. | 0       | 0 | ۲       | 0 | 0    | 0   |
| Minimize retesting or replacing the product.          | o       | C | O       | © | 0    | 0   |
| How would you rate their customer s                   | ervice? |   |         |   |      |     |
|   | Low     |   | Average |   | High |     |
|   | 1       | 2 | 3       | 4 | 5    | N/A |
| Timely feedback on problems.                          | 0       | 0 | O       | 0 | 0    | 0   |

Customer Care Rens are

### ACME

| Respond to this Survey Ac | tions - Settings - |
|---------------------------|--------------------|
| Survey Name:              | ACME               |
| Survey Description:       |                    |
| Time Created:             | 2/15/2011 9:03 AM  |
| Number of Responses:      |                    |

Show a graphical summary of responses

Show all responses

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# 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                                 |  |    |             |
|---|--|----|-------------|
| <u>ACME Sura</u> hy <u>ACME Sura</u> hy | 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 |



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

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| Customize AC                           | ME Survey          |  |
|--|--------------------|--|
| List Information                       |                    |  |
| Name:                                  | ACME Survey        |  |
| Web Address:                           | http://ww00130d:   | 16787/SupplierCollab/Lists/ACME Survey/overview.aspx |
| Description:                           | Selected survey of | uestions for the ACME Corporation                    |
| General Settings                       |                    | Permissions and Management                           |
| Title, description an                  | d navigation       | Delete this survey                                   |
| Advanced settings                      |                    | Save survey as temp[hte                              |
| I F I I I I I I                        | settings           | Permissions for this survey                          |
| Audience targeting                     | oottingo           |  |
| <ul> <li>Audience targeting</li> </ul> | ootango .          | Workflow settings                                    |

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

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| Jse this page to save your survey as a template. Users can create new surveys from this  | template.   |      |
|--|---|------|
| File Name<br>Enter the name for this template file.  | File name:  | .stp |
| Name and Description   | Template name:<br>ACME<br>Template description:<br>The ACME template is to be used for all<br>customers with similar characteristics<br>as ACME | × ×  |
| nclude Content<br>nclude content in your template if you want new surveys created from this template to<br>nclude the items in this survey. Including content can increase the size of your template.<br>Caution: Item security is not maintained in a template. If you have private content in this<br>survey, enabling this option is not recommended. | Include Content   |      |

• 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<br>Operation Completed Successfully  |    |
|---|----|
| The template has successfully been saved to the list template gallery. You can now create lists based on this template.<br>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.

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Basic Functions Surveys

| List Template Gallery                                |       |                         |                             |                           |                         |  |
|--|-------|-------------------------|-----------------------------|---------------------------|-------------------------|--|
| Make a template available for use in list not shown. | creat | ion by adding it to thi | s gallery. The templates i  | this gallery are availabl | le to this site and all | sites under it. Default list templates are |
| Upload • Actions • Settings •                        |       |                         |                             |                           |                         | View: All Templates •                      |
| Name   | Edit  | Modified                | Title                       | Languag                   | e Product Version       | Feature ID                                 |
| Lot Performance                                      |       | 10/5/2010 2:21 PM       | Lot Performance             | English                   | 3                       | {00BFEA71-DE22-43B2-A848-<br>C05709900100} |
| TPM Master Copy                                      |       | 1/17/2011 8:05 PM       | TPM Master Copy             | English                   | 3                       | {00BFEA71-DE22-43B2-A848-<br>C05709900100} |
| List Number Master                                   |       | 1/17/2011 8:46 PM       | List Number Master          | English                   | 3                       | {00BFEA71-DE22-43B2-A848-<br>C05709900100} |
| SupplierComments                                     |       | 1/18/2011 10:40 PM      | SupplierComments            | English                   | 3                       | {00BFEA71-DE22-43B2-A848-<br>C05709900100} |
| Suppliers  | 2     | 1/19/2011 8:20 AM       | Suppliers                   | English                   | 3                       | {00BFEA71-DE22-43B2-A848-<br>C05709900100} |
| SRMGAPAssessmentSurveyTemplates                      | _>    | 1/19/2011 8:25 AM       | SRMGAPAssessmentSurve       | /Templates English        | 3                       | {00BFEA71-DE22-43B2-A848-<br>C05709900100} |
| SupplierSelectionToolComments                        |       | 1/20/2011 10:30 AM      | SupplierSelectionToolComme  | ents English              | 3                       | {00BFEA71-DE22-43B2-A848-<br>C05709900100} |
| nancy template                                       |       | 1/25/2011 10:53 AM      | nancy template              | English                   | 3                       | {00BFEA71-EB8A-40B1-80C7-<br>506BE7590102} |
| tutorial NEW   |       | 2/14/2011 8:25 AM       | Assessment Survey           | English                   | 3                       | {00BFEA71-EB8A-40B1-80C7-<br>506BE7590102} |
| ACME I NEW   |       | 2/14/2011 12:26 PM      | ACME                        | English                   | 3                       | {00BFEA71-EB8A-40B1-80C7-<br>506BE7590102} |
| ACME_template I NEW                                  |       | 2/14/2011 3:49 PM       | ACME                        | English                   | 3                       | {00BFEA71-EB8A-40B1-80C7-<br>506BE7590102} |
| 🏄 Start 🏾 🏉 🚱 😡 Lowell R Hauenstei                   | 0     | Instant Messaging       | <i> (</i> List Template Gal | 🖄 links - Microsoft Word  | 🔄 Supplier Portal User  | r 🔄 Sample Questions f 🤘 « 3:53 PM         |

# 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



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• On the All Site Content page, click on Create.

| All            | Site Content           |
|----------------|------------------------|
| Ш <sup>*</sup> | Creating               |
| Doc            | ument Libraries        |
|                | Documents              |
| <b>(1)</b>     | Form Templates         |
| 63             | GPO Terms and Acronyms |
|                | Images                 |

 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.

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

| ame and Description<br>ype a new name as you want it to appear in headings and links throughout the site. Type descriptive text<br>lat will help site visitors use this survey. | Name:<br>Baxter Labs<br>Description:<br>This template has many of the<br>same characteristics as the ACME<br>template. |
|---|--|
| avigation<br>pecify whether a link to this survey appears in the Quick Launch.  | Display this survey on the Quick Launch?<br>C Yes I No   |

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

| Baxter Lab   |    |         |            |   |  |  |  |  |
|--|----|---------|------------|---|--|--|--|--|
| This template has many of the same characteristics as the ACME template. |    |         |            |   |  |  |  |  |
| Respond to this Survey Actions   | •  | Setting | s 🔻        |   |  |  |  |  |
| Survey Name:   | Ba |         | Add<br>Add | I Questions<br>an additional question to this |  |  |  |  |
| Survey Description:  |    |         | -          |   |  |  |  |  |
| Time Created:  |    |         | Man        | age questions and httings for                 |  |  |  |  |
| Number of Responses:   | 0  | **      | this       | survey. V                                     |  |  |  |  |

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

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| List Information              |  |  |                        |                                    |  |  |
|-------------------------------|--|--|------------------------|------------------------------------|--|--|
| Name:                         | Baxter Labs  |  |                        |                                    |  |  |
| Web Address:                  | http://ww00130   | 0d:16787/Supp  | lierCollab/Lists/Baxte | er Labs/overview.aspx              |  |  |
| Description:                  | as many of the same characteristicsa as the ACME template. |  |                        |                                    |  |  |
| General Settings              |  | F  | Permissions and I      | Management                         |  |  |
| Title, description and naviga | ition  | <ul> <li>Delete this survey</li> <li>Save survey as template</li> <li>Permissions for this survey</li> </ul> |                        |                                    |  |  |
| Advanced settings             |  |  |                        |                                    |  |  |
| Audience targeting settings   |  |  |                        |                                    |  |  |
|                               |  |  | Workflow settings      |                                    |  |  |
|                               |  | 5  | Information manage     | ement policy settings              |  |  |
| Questions                     |  |  |                        |                                    |  |  |
| A question stores information | about each iten  | m in th <mark>e survey</mark>  | . The following ques   | tions are currently available in t |  |  |
| Question                      | Ту   | ype of answer  | 4<br>7                 | Required                           |  |  |
| For How Long has your com     | hoice  |  |                        |                                    |  |  |

• 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.

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| ACME                           |                   |
|--------------------------------|-------------------|
| Respond to this Survey Act     | ions - Settings - |
| Survey Name:                   | ACME              |
| Survey Description:            |                   |
| Time Created:                  | 2/15/2011 9:03 AM |
| Number of Responses:           | 10                |
|                                |                   |
| Show a graphical summary of re | esponales         |
| 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:

| ACME                    |             |                             |  |
|-------------------------|-------------|-----------------------------|--|
| Respond to this Survey  | Actions •   | Settings -                  |  |
| . For How Long has your | company bee | n using ACME as a supplier? |  |
| Less than 1 year        |             |                             |  |
| 3 (30%)                 |             |                             |  |
| 1 year to 2 years       |             |                             |  |
| 5 (50%)                 |             |                             |  |
| More than 2 years up to | 3 years     |                             |  |
| 2 (20%)                 |             |                             |  |
| More than 3 years up to | 4 years     |                             |  |
| 0 (0%)                  |             |                             |  |
| More than 4 years up to | 5 years     |                             |  |
| 0 (0%)                  |             |                             |  |
| Over 5 years            |             |                             |  |
|                         |             |                             |  |

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• 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.

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Basic Functions Surveys

| ACME  |            |
|---|------------|
| Respond to this Survey Actions - Settings - |            |
| View Response                               | Created By |
| View Response #1                            | ***        |
| View Response #2                            | ***        |
| View Response #3                            | ***        |
| View Response #4                            | ***        |
| View Response #5                            | ***        |
| View Response #6                            | 222        |
| 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?*)

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Supplier Portal System Version 1.0 VCR#

| ACME: View Respons   | e #1   |             |            |                 |    |      | Clear |
|--|--|-------------|------------|-----------------|----|------|-------|
|  |  | 0-          |            |                 |    | _    | Close |
| 🖃 New Response   🞲 Edit Resp   | onse   🗙 Delete Response   | 📲 Manag     | ge Permiss | sions   Alert N | le |      |       |
| For How Long has your<br>company been using ACME<br>as a supplier?                         | Less than 1 year   |             |            |                 |    |      |       |
| How would you rate their<br>overall product quality?                                       |  | Low         |            | Average         |    | High |       |
|  |  | 1           | 2          | 3               | 4  | 5    | N/A   |
|  | Product conforms to<br>your quality<br>specifications.                                   | 0           | 0          | o               | ۲  | 0    | o     |
|  | preferences and<br>expectations.   | 0           | 0          | c               | 0  | 0    | 0     |
|  | replacing the product.   | 0           | 0          | 0               | o  | 0    | 0     |
| How would you rate their<br>customer service?  |  | Low         |            | Average         |    | High |       |
| customer service:  |  | 1           | 2          | 3               | 4  | 5    | N/A   |
|  | Timely feedback on<br>problems.<br>Customer Care Reps                                    | 0           | 0          | ۲               | 0  | 0    | o     |
|  | are knowledgeable concerning the issue.  | 0           | 0          | ©               | 0  | 0    | C     |
|  | Customer Care Reps<br>understand the issues.<br>Customer Service                         | 0           | 0          | ©               | 0  | 0    | 0     |
|  | solves the issue during<br>the first contact, ie, no<br>repeat contacts are<br>required. | o           | o          | o               | C  | 0    | 0     |
| How does ACME respond<br>when a complaint is filed.  | Requires multiple calls.   |             |            |                 |    |      |       |
| Is ACME price competive<br>when compared with<br>suppliers of the same/similar<br>product? | No   |             |            |                 |    |      |       |
| Does ACME operate any<br>Vendor Managed Inventory<br>(VMI) / ship to stock<br>programs?    | No   |             |            |                 |    |      |       |
| Does ACME provide cost<br>saving initiatives to reduce<br>cost base year on year?          | Yes  |             |            |                 |    |      |       |
| Please comment about this supplier   | ACME is on probation as a p  | rime contra | ctor.      |                 |    |      |       |
| Created at 2/16/2011 9:05 AM by **<br>Last modified at 2/16/2011 9:05 AM                   | *<br>by ***  |             |            |                 |    |      | Close |

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Basic Functions Create Additional Sites

### 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.

| SUPPLIER MANAGEMENT                 | THIRD PARTY MANUFACTURING  | PURCHASING | QUALITY ASSURANCE 🗢 EXTERNAL SITES 🤜 | 7        | Site Actions 🔻 |
|-------------------------------------|----------------------------|------------|--------------------------------------|----------|----------------|
| GPO Procurement Home<br>Create Page | > Pages > Create Page      |            |                                      |          |                |
| Page Title and Deparinti            |                            |            |                                      |          |                |
| Page The and Description            | on                         |            | Title:                               |          |                |
| Enter a URL name, title, and        | description for this page. |            | SharePoint Training                  |          |                |
|                                     |                            |            | Description:                         |          |                |
|                                     |                            |            | This site contains all of the Sh     | arePoint |                |
|                                     |                            |            | training documents and tutoria       | ils.     |                |
|                                     |                            |            | URL Name:                            |          |                |
|                                     |                            |            | Pages/ SharePointTraining            | .a       | ispx           |
|                                     |                            |            |                                      |          |                |

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Basic Functions Create Additional Sites

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



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

|                             | GPO PROCUREMENT HOME  | SUPPLIER MANAGEMENT       | THIRD PARTY MANUFACTURING | PURCHASING | QUALITY ASSURANCE 🔻 | EXTERNAL SITES 🗢 |  |  |  |  |
|-----------------------------|---|---------------------------|---------------------------|------------|---------------------|------------------|--|--|--|--|
| Version: Checked Out Status | : Only you can see and modify t                                   | his page.                 |                           |            |                     |                  |  |  |  |  |
| Page - Workflow - Tools     | Page - Workflow - Tools - Tage Check In to Share Draft, O Publish |                           |                           |            |                     |                  |  |  |  |  |
| Remember to check in so oth | er people can see your changes                                    | . (Do not show this messa | ge again)                 |            |                     |                  |  |  |  |  |
| Repositories                | GPO Procurement Home >  | SharePoint Training       |                           |            |                     |                  |  |  |  |  |
| Tools and Templates         |   |                           |                           |            |                     |                  |  |  |  |  |
| Training                    | Title   |                           |                           |            |                     |                  |  |  |  |  |
| Risk Assessment             | Chang Daint Training  |                           |                           |            |                     |                  |  |  |  |  |
| News Letters                | IsnarePoint Training  |                           |                           |            |                     |                  |  |  |  |  |
| SharePoint Training         |   |                           | Zone 1                    |            |                     |                  |  |  |  |  |
| Documentation               |   |                           | Add a Web Part            |            |                     |                  |  |  |  |  |
| Lists                       |   |                           | ¥                         |            |                     |                  |  |  |  |  |
| FAQ                         |   |                           |                           |            |                     |                  |  |  |  |  |
| Evente Calendar             |   |                           |                           |            |                     |                  |  |  |  |  |

- Entier 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.

| PURCHASING | QUALITY ASSURANCE 🔻 | EXTERNAL SITES 🗢 | SHAREPOINT TRAINING | Site Actions - |
|------------|---------------------|------------------|---------------------|----------------|
|            |                     |                  |                     |                |
|            |                     |                  |                     |                |
|            |                     |                  |                     |                |

• Publish the site.

| 3 |
|---|
|   |

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| <b>—</b>    |                     |                           |            |                     |                  |                       | _              |
|-------------|---------------------|---------------------------|------------|---------------------|------------------|-----------------------|----------------|
| IT HOME     | SUPPLIER MANAGEMENT | THIRD PARTY MANUFACTURING | PURCHASING | QUALITY ASSURANCE 🗢 | EXTERNAL SITES 🔫 | SHAREPOINT TRAINING   | Site Actions - |
| ble by auth | orized users.       |                           |            |                     |                  | 1                     |                |
| O Pu        | blish               |                           |            |                     |                  | /                     |                |
| nt Home >   | SharePoint Training |                           |            | SHARE               | POINT TRAINING   | appears on the site b | bar            |
| Fraining    | 3                   |                           |            |                     |                  |                       |                |

# 2.12. Remove a Site

• Go to Site Actions and click Edit Page



• Go to Page and select Delete Page

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|    | Page | Vorkflow - Tools              | Check In to Share Draft 👩 Publish                               |
|----|------|-------------------------------|---|
| -  |      | Save<br>Save and Stop Editing | r people can see your changes. (Do not show this message again) |
| Re |      | Check In<br>Discard Check Out | GPO Procurement Home > SharePoint Training                      |
|    |      | Page Settings                 | Title   |
|    | ×    | Delete Paggh                  | SharePoint Training   |
|    |      | Add Web Parts                 | Z   |
|    | sts  | Modify Web Parts              | 🖳 Add   |



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

| SUPPLIER MANAGEMENT | THIRD PARTY MANUFACTURING | PURCHASING | QUALITY ASSURANCE 🗢 | EXTERNAL SITES 🔻 | Site Actions 👻 |
|---------------------|---------------------------|------------|---------------------|------------------|----------------|
|                     |                           |            |                     |                  |                |

### 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.

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Basic Functions Create a Simple Wiki Library



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



• On the All Site Content page, select Create

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Basic Functions Create a Simple Wiki Library



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

| SUPPLIER MANAGEMENT   | THIRD PARTY MANUFACTURING                               | PURCHASING QUALITY A                               | SSURANCE 🔻 EXTERNAL SITES 🗢  | Site Actions 🝷                                     |
|---|---|--|--|--|
| PO Procurement Home   | > Create  |  |  |  |
| reate   |   |  |  |  |
|   |   |  |  |  |
| Wiki Page Li  | brary   |  |  |  |
| Create a Wiki   | page library when you want to h                         | have an interconnected collect<br>and wiki linking | ion of Wiki pages. Wiki page   |  |
| ilorarios sapp  | ni pictares, tables, hyperinitis, a                     | ing wiki linking.                                  |  |  |
|   |   |  |  |  |
|   |   |  |  |  |
|   |   |  |  |  |
| ibraries  | Communications  | Tracking   | Custom Lists   | Web Pages  |
| Libraries Document Library  | Communications Announcements                            | Tracking   | Custom Lists Custom List   | Web Pages Basic Page                               |
| ibraries Document Library Form Library                                    | Communications Announcements Contacts                   | Tracking     Links     Calendar                    | Custom Lists Custom List Custom List Custom List in Datasheet View                           | Web Pages Basic Page Web Part Page                 |
| Libraries<br>Document Library<br>Form Library<br><u>Wiki Page Library</u> | Communications  Announcements Contacts Discussion Board | Tracking<br>Links<br>Calendar<br>Tasks             | Custom Lists Custom List Custom List Custom List in Datasheet View Languages and Translators | Web Pages Basic Page Web Part Page Publishing Page |

• 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.

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| Basic Functions              |  |
|------------------------------|--|
| Create a Simple Wiki Library |  |

| SUPPLIER MANAGEMENT   | THIRD PARTY MANUFACTURING  | PURCHASING         | QUALITY ASSURANCE 🗢       | EXTERNAL SITES 🗢  | Site Actions 🔻 |
|---|--|--------------------|---------------------------|---|----------------|
| GPO Procurement Hom<br><b>New</b>   | e > Create > New   |                    |                           |   |                |
|   |  |                    |                           |   |                |
| Name and Description<br>Type a new name as you<br>text that will help site visite | want it to appear in headings and<br>rs use this document library. | links throughout t | he site. Type descriptive | Name:<br>GPO Terms and Acronyms<br>Description:<br>This Wiki library contains all of the<br>GPO terms and acronyms. |                |
| Navigation<br>Specify whether a link to t   | his document library appears in the                                | e Quick Launch.    |                           | Display this document library on the C<br>C Yes C No  | Quick Launch?  |
|   |  |                    |                           | Create  | Cancel         |

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

| GPO Procurement Hor  | ne   |  |  |                          | A Promise for                        |
|--|--|--|--|--------------------------|--------------------------------------|
|  |  |  | This Site: GPO P                                 | rocurement Home 💌        | go                                   |
| GPO PROCUREMENT HOME SUPPLIER MANAGEMENT   | THIRD PARTY MANUFACTURING  | PURCHASING                               | QUALITY ASSURANCE 🔻                              | EXTERNAL SITES 🔻         | Site Action                          |
| GPO Procurement Home > GPO Terms and Acrony  | yms > Home   |  |  |                          |                                      |
| Home   |  |  |  |                          |                                      |
| Edit   History   Incoming Links  |  |  |  |                          |                                      |
| Welcome to your wiki library!  |  |  |  |                          |                                      |
| You can get started and add content to this page by cl   | icking Edit at the top of this pa                                  | ge, or you can le                        | arn more about wiki libr                         | aries by clicking How T  | o Use This Wiki Library.             |
| What is a wiki library?  |  |  |  |                          |                                      |
| Wikiwiki means quick in Hawaiian. A wiki library is a c<br>creating links to new pages. If a user finds a link to an | document library in which user<br>I uncreated page, he or she ca   | 's can easily edit<br>an follow the link | any page. The library gr<br>and create the page. | ows organically by link  | ing existing pages together or by    |
| In business environments, a wiki library provides a loc<br>conversations, or written on paper can instead be rec     | w-maintenance way to record l<br>orded in a wiki library, in conte | knowledge. Infor<br>xt with similar kn   | mation that is usually tr<br>owledge.            | aded in e-mail messag    | ges, gleaned from hallway            |
| Other example uses of wiki libraries include brainstor<br>and building an encyclopedia of knowledge.                 | ming ideas, collaborating on o                                     | designs, creating                        | ) an instruction guide, g                        | athering data from the f | field, tracking call center knowledg |
| Last modified at 2/4/2011 2:01 PM by Hauenstein, Rick R  |  |  |  |                          |                                      |
|  |  |  |  |                          |                                      |
|  |  |  |  |                          |                                      |
|  |  |  |  |                          |                                      |
|  | ·   @u   |  |  |                          |                                      |
| tart 🧭 😰 🔟 Loweii k Hauen 👩 Instant Messag   | gi   🥭 Home - GPO Pr   🌔   | GPU Procure                              | E ADDOLT Home                                    | C INDOX (61) - 'at       | Z Microsort Ur V C:U1 PM             |
|  |  |  |  |                          |                                      |

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Repositories Tools and Templates Training Risk Assessment News Letters SharePoint Training Documentation GPO Terms and Acronyms Lists Events Calendar GAP Assessment Quick Links Ask a Question FAQs Sites

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

Recycle Bin



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

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**Basic Functions** 

Create a Simple Wiki Library



Basic Functions Create a Simple Wiki Library

| GPO Procurement Home > GPO Terms and Acronyms |   |         |  |  |  |  |  |  |
|---|---|---------|--|--|--|--|--|--|
| GPO   | GPO Terms and Acronyms  |         |  |  |  |  |  |  |
| This V  | This Wiki library contains all of the GPO terms and acronyms. |         |  |  |  |  |  |  |
| New   | •   | Actions | ✓ Settings ✓                                 |  |  |  |  |  |
| Туре  | Nam   | e       | (  |  |  |  |  |  |
| ۲   | Hom   | e I NEW | -  |  |  |  |  |  |
| ۲   | How   | / Т     | View Properties                              |  |  |  |  |  |
|   |   |         | Edit Properties                              |  |  |  |  |  |
|   |   | 45      | Manage Permissions                           |  |  |  |  |  |
|   |   | ۲       | Edit in Microsoft Office SharePoint Designer |  |  |  |  |  |
|   |   | ×       | Delete dhy                                   |  |  |  |  |  |
|   |   |         | Send To                                      |  |  |  |  |  |
|   |   | D       | Check Out                                    |  |  |  |  |  |
|   |   | 5       | Version History                              |  |  |  |  |  |
|   |   | 2       | View Workflow History                        |  |  |  |  |  |
|   |   | ~       | Schedule Workflows                           |  |  |  |  |  |
|   |   |         | Alert Me                                     |  |  |  |  |  |

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

| GPO Terms and Acronyms                         |                         |  |          |
|--|-------------------------|--|----------|
| This Wiki library contains all of the GPO terr | ms and acronyms.        |  |          |
| New 🗢 Actions - Settings -                     | 7                       |  |          |
| New Wiki Page                                  | Modified By             | Modified   | O Crea   |
| Create a new Wiki pag                          | Terms and Acronyms" wik | i page library. To create a new item, click "New | " above. |

- 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.

| 5 |
|---|
| 5 |

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Basic Functions Create a Simple Wiki Library

| 3PO Procurement Home > GPO Terms and Acronyms > New Wiki Page<br>New Wiki Page  |   |
|---|---|
| Di-up Direct  | Create 📐 Cancel   |
| Name * SharePoint Wiki Content  |   |
| A AIB Z 및 특종 홈 註 단 建 같 <u>A</u> 30 M 11   |   |
| Microsoft SharePoint is a family of software products developed by Micro<br>The current version is [[WSS]] 3.0 and is configured for use with Microsoft | psoft for collaboration, file sharing and web publishing. |

 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.

GPO Procurement Home > GPO Terms and Acronyms > SharePoint

#### SharePoint

Edit | History | Incoming Links 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.

eb publishing. The current version is WSS 3.0 and is configured for use

• 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**.

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Basic Functions Create a Simple Wiki Library

- 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

| GPO Procurement Home > GPO Terms and Acronyms > New Wiki Page<br>New Wiki Page |               |
|--|---------------|
|  | Create Cancel |
| Name * WSS<br>Wiki Content   |               |
| A A1 B Z U 臣 書 書 臣 臣 諱 諱 A M H 14  |               |
| Windows SharePoint Services  | <u>a</u>      |

| Repositories                         | GPO Procurement Home > <u>GPO Terms and Acyppyms</u> > WSS |
|--------------------------------------|--|
| Tools and Templates                  |  |
| Training                             | WSS  |
| Risk Assessment                      | Edit History Incoming Links                                |
| News Letters                         |  |
| SharePoint Training<br>Documentation | Windows SharePoint Services                                |
| GPO Terms and<br>Acronyms            | Last modified at 2/4/2011 2:19 PM by Hauenstein, Rick R    |

- 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.

| GPO      | Procurement Home > GPO         | Terms and Acronyms         |                  |            |                  |
|----------|--------------------------------|----------------------------|------------------|------------|------------------|
| GPC      | Terms and Acrony               | ms                         |                  |            |                  |
| This V   | Viki library contains all of t | he GPO terms and acronyms. |                  |            |                  |
| New      | Actions      Settings          | •                          |                  |            | View: All Pages  |
| Туре     | Name                           | O Modified By              | Modified         | Created By | Created          |
| <b>E</b> | SharePoint NEW                 |                            | 2/4/2011 2:17 PM |            | 2/4/2011 2:11 PM |
| ۲        | WSS ! NEW                      |                            | 2/4/2011 2:19 PM |            | 2/4/2011 2:19 PM |
|          |                                |                            |                  |            |                  |

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# 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.



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- 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).

| l Web Par | ts Webpage Dialog   |          |
|-----------|---|----------|
| Add       | *arty Manufacturing - Quality Assurance<br>Neb Parts to Right   |          |
|           |   |          |
|           |   |          |
|           |   | <b>^</b> |
|           | Advanced Search Box<br>Used for parameterized searches based on properties and combinations of words.                   |          |
|           | Federated Results<br>This webpart displays the Federated results from the configured location.                          |          |
|           | People Search Box<br>Used to search people.   |          |
|           | People Search Core Results<br>This web part displays the people search results and the properties associated with them. |          |
|           | Search Action Links<br>Web part to display the search action links.   |          |
|           | Search Best Bets<br>Web part to display the special term and high confidence results.                                   |          |
|           | Search Box Used to search document and items.   |          |
|           | Search Core Results<br>This web part displays the search results and the properties associated with them.               |          |
|           | Search High Confidence Results<br>Displays keywords, best bets and high confidence results.                             |          |
|           | Search Paging<br>Display links for navigating pages containing search results.  |          |
| _         |   | <b>•</b> |
|           | Advanced Web Part gallery and o   | option   |
|           | Add   | ncel     |

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

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Basic Functions Executing a Search Query

| Search Box |          |
|------------|----------|
| All Sites  | <b>P</b> |

• 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.

| ssurance              |                         |                 |            | A Promise for L |
|-----------------------|-------------------------|-----------------|------------|-----------------|
| This Site: Third Par  | ty Manufacturing - Qual | ity Assurance 🚽 |            | go              |
| This Site: Third Part | y Manufacturing - Quali | ty Assurance    |            |                 |
| PURCHASING QUAL       | TY ASSURANCE 👻 🖪        | XTERNAL SITES 🗟 | arch Scope | Site Actions    |

- 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)
  - o Performs a People search from the active directory

|   | Search Box   |   |
|---|--|---|
| ſ | All Sites  | Q |
| Ī | This Site: Third Party Manufacturing - Quality Assurance |   |
|   | All Sites  |   |
|   | People   |   |

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

| <b>Global Pharmaceutical Ope</b> | rations |
|----------------------------------|---------|
|----------------------------------|---------|

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- 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
   Go Search 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:

| Third Part                 | ty Manufact                  | turing - Qualit                | y Assu          | rance              |
|----------------------------|------------------------------|--------------------------------|-----------------|--------------------|
| GPO PROCUREMENT HOME       | SUPPLIER MANAGEMENT          | THIRD PARTY MANUFACTURING      | PURCHASING      | QUALITY ASSURANCE  |
| This Site: Third Party Man | ufacturing - Quality Assurar | nce 💌 TPM Investigations       | م               |                    |
|                            |                              |                                |                 |                    |
| Result 1-1 of 1. Your sear | ch took 0.11 seconds.        |                                |                 |                    |
| Shared Documents           | s - TPM Investigations       | s Chart                        |                 |                    |
| TPM Investigations Cha     | rt.aspx TPM Investigat       | ions Chart.aspx                |                 |                    |
| http://ww00130d:167        | A/TPM/Shared Documents/      | /TPM Investigations Chart.aspx | - 44KB - SYSTEM | ACCOUNT - 10/19/20 |

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

| Search Box  |             |
|---|-------------|
| This Site: Third Party Manufacturing - Quality Assurance 🔽 Sharepoint Use | r's Guide 🔎 |

• 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.

| s |
|---|
| s |

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• 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*.

| Search Box | 7  | 7     |
|------------|--|-------|
| All Sites  | Sharepoint User's Guide"                 |       |
|            | le l | ) Sea |

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



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 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 *Guide*lines 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

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Basic Functions Security and Permissions

(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.

| Sha     | SharePoint Training Documentation   |                   |                    |                       |  |  |
|---------|---|-------------------|--------------------|-----------------------|--|--|
| This li | This library consists of all available GPO SharePoint training materials. |                   |                    |                       |  |  |
| New     | Upload      Actions      Settings   |                   | 1                  | /iew: All Documents • |  |  |
| Туре    | Name  | Modified          | O Modified By      | All Documents         |  |  |
|         | Latest Revised User Guide   | 1/28/2011 1:48 PM | Hauenstein, Rick R | hExplorer View        |  |  |
|         | SharePoint Procedures Part 1  | 2/3/2011 11:01 AM | Hauenstein, Rick R | Modify this View      |  |  |
| W)      | SharePoint Procedures Part 2  | 1/27/2011 2:16 PM | Hauenstein, Rick R | Create View           |  |  |
|         | SharePoint Procedures Part 3  | 1/24/2011 4:35 PM | Hauenstein, Rick R |                       |  |  |
|         | SharePoint Procedures Part 4  | 1/24/2011 4:35 PM | Hauenstein, Rick R |                       |  |  |

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

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Basic Functions Using Windows Explorer to Manage Directories/Files

| SharePoint Training Docum<br>This library consists of all available G   | nentation<br>GPO ShareP | n<br>roint training ma       | terials.              |                       |                       |                       |
|---|-------------------------|------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Actions - Settings -  |                         |                              |                       |                       |                       |                       |
| Other Places     A       Image: Web Folders     Image: Web Folders       Image: My Documents     Image: Wy Network Places | Forms                   | Latest Revised<br>User Guide | SharePoint<br>Procedu | SharePoint<br>Procedu | SharePoint<br>Procedu | SharePoint<br>Procedu |

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



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Basic Functions Using Windows Explorer to Manage Directories/Files

 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.

| 🚄 links  |          |
|--|----------|
| File Edit View Favorites Tools Help              | <b>#</b> |
| 🕜 Back 🔹 🌍 🖌 🏂 🔎 Search 🔊 Folders 🔛 🗸            |          |
| Address 🔁 H:\links 💌 🔁                           | Go       |
| Folders × Inks                                   |          |
| Besktop Microsoft Word Document                  |          |
| I I I I I I I I I I I I I I I I I I I            |          |
| 🗀 legal  |          |
| E 🛅 Microsoft Press                              |          |
| 🖻 My Data Sources                                |          |
| E 🚔 My HVE Repository                            |          |
| 🚔 My Music                                       |          |
| 📇 My Pictures                                    |          |
| 🚔 My Shapes                                      |          |
| My Videos  |          |
| 🗄 🧰 Reflection                                   |          |
| B SharePoint Drafts                              |          |
| S My Computer                                    |          |
| $\square$ $\square$ Local Disk (c;)              |          |
| b S DVD/CD-KW DW6 (0:)                           |          |
|  |          |
|  |          |
|  |          |
|  |          |
| The wine estate                                  |          |
| 🗄 📚 Goo data\$ on 'NetApp (Loppofile03)' (K; )   |          |
| 🗄 😒 Gpo dept\$ on 'NetApp (Lcppqfile03)' (L;)    |          |
| 🗄 🔶 Pcapps on 'Lcppgfile01' (N:)                 |          |
| 🕀 😤 Ppdoapps on 'Lcppgfile01' (P:)               |          |
| E 😹 PPG App Data (\\NORTHAMERICA\ADFS3) (W:)     |          |
| E 😤 PPG Applications (\\PPDAPM0063\SrvApps) (X:) | h        |

- The file can be uploaded by:
  - o 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.

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Supplier Portal System Version 1.0 VCR#

Basic Functions Using Windows Explorer to Manage Directories/Files

| Ctions • Settings • Other Places |  |  |                         |                                   | View: | Explorer View |
|----------------------------------|--|--|-------------------------|-----------------------------------|-------|---------------|
| Other Places 🌣                   |  |  |                         |                                   |       |               |
| Web Folders                      | Forms Latest Revised<br>User Guide           | SharePoint SharePoint<br>Procedu Procedu | SharePoint :<br>Procedu | SharePoint<br>Procedu             |       |               |
|                                  | File Edit View Favorites                     | Tools Help                               | •                       |                                   |       |               |
|                                  | Address H\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\ | ×<br>-                                   | iink<br>Mic<br>28       | rs<br>rrosoft Word Document<br>KB |       | <b>▼</b> → 60 |

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## 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



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Go to List Settings



• Select Workflow settings

| List Information  |  |                                       |
|---|--|---------------------------------------|
| Name:   | Suppliers  |                                       |
| Web Address:  | http://ww00130d:16787/SM/Lists/Suppliers   | s/AllItems.aspx                       |
| Description:  |  |                                       |
|   |  |                                       |
|   |  |                                       |
| eneral Settings   | Permissions and M  | lanagement                            |
| eneral Settings<br>Title, description and navigation  | Permissions and N Delete this list   | lanagement                            |
| eneral Settings<br>Title, description and navigation<br>Versioning settings                       | Permissions and M Delete this list Save list as temp                             | lanagement                            |
| General Settings<br>Title, description and navigation<br>Versioning settings<br>Advanced settings | Permissions and M<br>Delete this list<br>Save list as temp<br>Permissions for th | <b>lanagement</b><br>late<br>nis list |

• Select the parameters for the workflow

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

| 🗨 🕘 🗢 🙋 http://ww00130d:16787/SM/_Jayouts/AddWrkfl.aspx?List=%7BC1682F52%2D3060%2D48E6%2D8042%2D7EC 🔽 🍫 🔀 Sharepoint workflows   |     |  |  |  |  |  |  |  |
|--|-----|--|--|--|--|--|--|--|
| 🖉 🔍 🕫 🕅 http://ww00130d:16787/SM/_Jayouts/AddWrkfl.aspx?Lust=%7BC1682F52%2D3060%2D48E6%2D8042%2D7EC 💌 🐓 🗶 🌠 Sharepoint workflows |     |  |  |  |  |  |  |  |
| File Edit View Favorites Tools Help 🛛 🗴 🥥 Snagit 🧮 🔟   |     |  |  |  |  |  |  |  |
| 🙀 Favorites 🙀 🙆 Web Slice Gallery 🔸  |     |  |  |  |  |  |  |  |
| 🗄 🔻 💽 Sharepoint workflows - Bing 🛛 🌈 Add a Workflow 🗙 👘 🕹 🖓 🖈 🔂 🗸 🖾 👘 💌 Page 🔹 Safety 🕶 Tools 🕶 🌘                               | • » |  |  |  |  |  |  |  |
|  |     |  |  |  |  |  |  |  |
| lanagement   |     |  |  |  |  |  |  |  |
|  | -1  |  |  |  |  |  |  |  |
| SUPPLIER MARINGEMENT   | ons |  |  |  |  |  |  |  |
| Add a Workflow: Supplier wanagement > Suppliers > Settings > worknow settings > Add or Change a worknow                          |     |  |  |  |  |  |  |  |
| Add a Worknow. Suppliers   |     |  |  |  |  |  |  |  |
| Use this page to set up a workflow for this list.  |     |  |  |  |  |  |  |  |
| Workflow Salact a workflow templata: Description   |     |  |  |  |  |  |  |  |
| Select a workflow to add to this list. If the workflow template Approval Routes a document for approval. Approvers               |     |  |  |  |  |  |  |  |
| you want does not appear, contact your administrator to get<br>it added to your site collection or workspace.                    |     |  |  |  |  |  |  |  |
| Disposition Approval document.   |     |  |  |  |  |  |  |  |
| Name The California  |     |  |  |  |  |  |  |  |
| Type a name for this workflow. The name will be used to  |     |  |  |  |  |  |  |  |
| identify this workflow to users of this list.  |     |  |  |  |  |  |  |  |
| Tablia   |     |  |  |  |  |  |  |  |
| Select a task list: Description:<br>Select a task list to use with this workflow. You can select                                 |     |  |  |  |  |  |  |  |
| an existing task list or request that a new task list be   |     |  |  |  |  |  |  |  |
| created.   |     |  |  |  |  |  |  |  |
| History List Description:  |     |  |  |  |  |  |  |  |
| Select a history list to use with this workflow. You can select Workflow History It history History list for workflow.           |     |  |  |  |  |  |  |  |
| an existing history list or request that a new history list be created.  |     |  |  |  |  |  |  |  |
|  |     |  |  |  |  |  |  |  |
| Start Options  Allow this workflow to be manually started by an authenticated user with Edit Items Permissic                     | ns. |  |  |  |  |  |  |  |
| Specify how this workflow can be started.  |     |  |  |  |  |  |  |  |
| Stat this workflow to approve publishing a major working of an item  |     |  |  |  |  |  |  |  |
| Start this worknow to approve publishing a major version of an item.   |     |  |  |  |  |  |  |  |
| Start this workflow when a new item is created.  |     |  |  |  |  |  |  |  |
| Start this workflow when an item is changed.   |     |  |  |  |  |  |  |  |
|  |     |  |  |  |  |  |  |  |
| Next Cance   |     |  |  |  |  |  |  |  |

• The Next page includes additional parameters as shown below.

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| Notice Task       Assign tasks tri <ul> <li></li></ul>  |   |  |
|---|---|--|
| Risking as subject to be according to according to subject to the subject to a subject to the s |   | OK Cance   |
| Default Workflow Start Values   Bypedry the default values that this workflow will use when it is started.   Starter of participation.   The the names of participation was that this workflow is started. Add names of participation was the tasks ansigned (for serial workflow). Is a for default values that this workflow is started. Add names of participation was the tasks ansigned (for serial workflow). Is a for default value that this workflow is started. Add names of participation is the participation is the participation is the participation. Is a for default value that this workflow is started. Add names of participation is the participation is the participation. Is a participation. Is a dwork charges to the participation is enabled on the server, participants will receive a method or that data is a for forfable with your request: Is a dwork charges to the participation is enabled on the server, participants will receive a method or that data is a forfable data. Is a dwork charges to the participation is enabled on the server, participants will receive a method or that data is a forfable data. Is a dwork charges to the participation is enabled on the server, participants will receive a method or that data is a forfable data. Is a dwork charges the participation is workflow is started. Is a dwork charges the participation is workflow was that as is a forfable. Is a dwork charges the participation when the is workflow when the is a contradiction when the is workflow when the is a contradiction. Is a dwork when the is a contradiction. Is a completed this workflow was the workflow was to completed. Is completed to a workflow when the is a contradiction. Is a completed with a server of a started is a for forbab. Is a completed with a server of a started is a for forbab. Is a completed with a started is a forbab. Is a complet  | Vorkflow Tasks<br>specify how tasks are routed to participants and whether to allow tasks<br>o be delegated or if participants can request changes be made to the<br>locument prior to finishing their tasks. | Assign tasks to:<br>C All participants simultaneously (parallel)<br>C One participant at a time (serial)<br>Allow workflow participants to:<br>IV Reassign the task to another person<br>IV Request a change before completing the task: |
| Specify the default values that workflow values are when it is started.       Add names of people you wast the tasks assigned for senial workflow is started.       Add names of people you wast the tasks assigned for senial workflow is started.       Add names of people you wast the tasks assigned for senial workflow is started.       Add names of people you wast the tasks assigned for senial workflow is started.       Add names of people you wast the tasks assigned for senial workflow is started.       Add names of people you wast the tasks assigned for senial workflow is started.       Add names of people you wast the tasks assigned for senial workflow is started.       Add names of people you wast the tasks assigned for senial workflow is started.       Add names of people you wast the tasks assigned for senial workflow is started.       Add names of people you wast the tasks assigned for senial workflow is started.       Add names of people you wast the tasks assigned for senial general groups).       Image: tasks of tasks o   | Jefault Workflow Start Values   |  |
| Due Date         If 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:         If 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:         If 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:         If 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.         If 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.         If 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.         If due date is specified and e-mail is enabled.         If output  | ipacity the default values that this workflow will use when it is started.<br>For can opt to allow the person who starts the workflow to change or add<br>articipants.  | 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).  |
| Complete the Workflow       To notify others         Specify when you want the workflow to be completed. If you do not select       Complete this workflow when:         Point complete the workflow will be completed when all tasks are finished:       Complete this workflow when:         Point completion Workflow Activities       Complete this workflow when the:         Document is rejected       Document is rejected         Document is rejected       Document is workflow to control content approval)   |   | Due Date If a due date in 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):   |
| Complete the Workflow Specify when you want the workflow to be completed. If you do not select invy options, the workflow will be completed when all tasks are finished.  Complete this workflow when the Complete this workflow when the Complete this workflow when the Completion Workflow Activities Specify the actions you want to occur after the workflow has been successfully completed.  Complete the approval status (use this workflow to control content approval)  |   | To notify others To notify other people when this workflow starts without assigning tasks, type names on the CC line.  |
| Specify when you want the workflow to be completed. If you do not select instead.       Complete this workflow when:         Impropriors, the workflow will be completed when all tasks are finished.       Following number of tasks are finished:         Impropriors, the workflow will be completed when all tasks are finished.       Following number of tasks are finished:         Improve the completed when all tasks are finished.       Following number of tasks are finished:         Improve the completed when all tasks are finished.       Document is rejected.         Document is changed       Document is changed.         Post completed.       After the workflow is completed:         Update the approval status (use this workflow to control content approval)       Improval  | omplete the Workflow  |  |
| Post completion Workflow Activities Specify the actions you want to occur after the workflow has been uccessfully completed. Update the approval status (use this workflow to control content approval)   | ipecity when you want the workflow to be completed. If you do not select<br>ny options, the workflow will be completed when all tasks are finished.   | Complete this workflow when:<br>Following number of tasks are finished:<br>Cancel this workflow when the:<br>Decument is rejected<br>Decument is changed   |
|   | Post completion Workflow Activities<br>specify the actions you want to occur after the workflow has been<br>successfully completed.   | After the workflow is completed:   |
| OK Cano   |   | OK Cancel  |

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

| Change Workflow Settings: Suppliers  |  |
|--|--|
| Use this page to view or change the workflow settings for this list. You already in progress.<br>Workflows | can also add or remove workflows. Changes to existing workflows will not be applied to workflows |
| Workflow Name (click to change settings)   | Workflows in Progress  |
| Hospira  | 0  |
| Add a workflow   |  |
| Remove a workflow  |  |
| View workflow reports  |  |

#### 2.18.3. General Work Flow Process – Creating a Workflow

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



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

| <b>a</b> t a         | Nintex Workflow Designer: New Workflow   |
|----------------------|--|
| Commonly used        | Create and modify Nintex workflows.<br>You have not been allowed as a workflow designer on this teamsite. Contact your Administrator for access. |
| 3                    | Actions • Settings •   |
| Set a condition      | Start  |
| &                    |  |
| Request approval     | End  |
| $\succ$              |  |
| Send a notification  |  |
| Integration          |  |
| Libraries and lists  |  |
| Logic and flow       |  |
| Operations           |  |
| Publishing           |  |
| SharePoint profiles  |  |
| Sites and workspaces |  |
| User interaction     |  |

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

| Select a work  | flow template              |                             |                      | e   |
|--|----------------------------|-----------------------------|----------------------|---|
| Blank<br>Business<br>Management /<br>Finance<br>Human Resources<br>Operations and IT<br>Project Tracking /<br>Product<br>Management<br>Sales / Marketing | Project Budget<br>Approval | Project Issue<br>Escalation | Project Team<br>Site | Blank Design a new workflow from a blank page. Alternatively, sele a template from one of the categories. |
| Show template page who   | en creating a new workflo  | w                           |                      | Create Cancel   |

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# 2.18.4. Tracking Work Flow Status



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

| Exc  | Exception Report                     |   |                     |             |               |                      |                                |  |
|------|--------------------------------------|---|---------------------|-------------|---------------|----------------------|--------------------------------|--|
| New  | Actions                              |   | Settings 🝷          |             |               |                      |                                |  |
| Туре | Title                                | U | TPM Tracking Number | High Impact | Date of Event | Date of Notification | Date 1st Draft Rec'd by TPM QA |  |
|      | Exception<br>Report : test -<br>test | U | 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        |
|                            |      |           |             |     |            |                            |             |

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|                   |             |                      |           | ,                   | View: | All Items  | •          |
|-------------------|-------------|----------------------|-----------|---------------------|-------|------------|------------|
| Short Description | List Number | Incident Type        | TPM Name  | ТРМ                 | TPI   | M Location | TPM Region |
| test              | 4505        | Expired<br>materials | test12345 | test12345 -<br>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   🐣 🖞 | Vorkflow 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<br>QA            | 1/25/2011   |                  |  |  |  |  |

| Workflow Status                      |                         |                   |                            |
|--------------------------------------|-------------------------|-------------------|----------------------------|
| Nintex workflows that are running fo | r 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                      |

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## 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.

| Exc   | Exception Report |   |                     |             |               |  |  |  |  |  |
|---|------------------|---|---------------------|-------------|---------------|--|--|--|--|--|
| New   | Actions          | S | Settings 🝷          |             |               |  |  |  |  |  |
| Туре  | Title            | U | TPM Tracking Number | High Impact | Date of Event |  |  |  |  |  |
| Exception<br>Report :<br>Exception Report : TPM9807 |                  | 0 | Vinda1              | Yes         | 1/24/2011     |  |  |  |  |  |

• From the document or item screen, select Workflow

| Exception Report: Exception Report : TPM9807 |  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|--|
|  | Close  |  |  |  |  |  |  |  |
| 📑 New Item   📝 Edit Item   🗙                 | Delete Item   🐴 Manage Permissions   🧭 <u>Workflours</u>   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<br>QA            | 1/25/2011  |  |  |  |  |  |  |  |
| Date Approved by TPM QA                      |  |  |  |  |  |  |  |  |
| CAPA Identified                              |  |  |  |  |  |  |  |  |

- 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.

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| Workflows: Exception Report : TPM9807  |                           |       |             |  |  |  |  |
|--|---------------------------|-------|-------------|--|--|--|--|
| Use this page to start a new workflow on the current item or to view the status of a runni | ng 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 Info  | ormation  |   |                             |  |  |   |
|--|---|---|-----------------------------|--|--|---|
|  |   |   |                             |  |  |   |
| nitiator:  | Hauenstein, Rick R  |   | Item:                       | Exception Re   | eport : TPM9807  |   |
| Started:   | 2/23/2011 4:16 PM   |   | Status:                     | In Progress  |  |   |
| Last run:  | 2/23/2011 4:18 PM   |   |                             |  |  |   |
| If an error occu<br>ª Terminate this<br>Tasks  | rs or this workflow stops res<br>workflow now,  | ponding, it can be terminated.  | Terminating the workflow wi | l set its status to C                                    | canceled and will delete all   | tasks created by the wor                        |
| f an error occu<br>Terminate this<br>Tasks<br>The following t  | rs or this workflow stops res<br>workflow now.<br>asks have been assigned to t  | ponding, it can be terminated.<br>he participants in this workflo   | Terminating the workflow wi | l set its status to C                                    | anceled and will delete all  | tasks created by the wor                        |
| f an error occu<br>Terminate this<br>Tasks<br>The following t<br>Assigned To   | irs or this workflow stops res<br>workflow now.<br>asks have been assigned to th  | ponding, it can be terminated.<br>he participants in this workflo<br>Title                                | Terminating the workflow wi | I set its status to C<br>can also view thes<br>Due Date  | Canceled and will delete all<br>se tasks in the list Workflow<br>Status                | tasks created by the wor<br>v Tasks.<br>Outcome |
| f an error occu<br>a Terminate this<br>Tasks<br>The following t<br>Assigned To<br>Thikkavarapu   | irs or this workflow stops res<br>workflow now.<br>asks have been assigned to th<br>J, Sundeep R  | ponding, it can be terminated,<br>he participants in this workflo<br>Tritle<br>Exception - Re             | Terminating the workflow wi | I set its status to C<br>can also view thes<br>Due Date  | anceled and will delete all<br>the tasks in the list Workflov<br>Status<br>Not Started | v Tasks.<br>Outcome<br>Pending                  |
| f an error occu<br>Terminate this<br>Tasks<br>The following t<br>Assigned To<br>Thikkavarapu<br>Workflow His   | irs or this workflow stops res<br>workflow now.<br>asks have been assigned to th<br>J, Sundeep R<br>tory  | ponding, it can be terminated.<br>he participants in this workflo<br>Trite<br>Exception - Re              | Terminating the workflow wi | I set its status to C<br>can also view thes<br>Due Date. | anceled and will delete all<br>the tasks in the list Workflow<br>Status<br>Not Started | v Tasks.<br>Outcome<br>Pending                  |
| f an error occu<br>Terminate this<br>Tasks<br>The following t<br>Assigned To<br>Thikkavarapu<br>Workflow His<br>View workfl                            | ins or this workflow stops res<br>workflow now.<br>asks have been assigned to th<br>asks have been assigned to the<br>asks have been asks have been asks have been asks have been asks<br>asks have been asks have been asks have been asks have been asks<br>asks have been asks have been asks have been asks have been asks<br>asks have been asks have been asks have been asks have been asks<br>asks have been asks have been asks have been asks<br>asks have been asks have been asks have been asks have been asks<br>asks have been asks have been asks have been asks<br>asks have been asks have been asks have been asks<br>asks have been asks have been asks have been asks<br>asks have been asks have been asks have been asks<br>asks have be | ponding, it can be terminated.<br>he participants in this workflo<br>Trite<br>Exception - Re              | Terminating the workflow wi | I set its status to C<br>can also view thes<br>Due Date  | anceled and will delete all<br>the tasks in the list Workflow<br>Status<br>Not Started | v Tasks.<br>Outcome<br>Pending                  |
| If an error occu<br>Terminate this<br>Tasks<br>The following t<br>Assigned To<br>Thikkavarapu<br>Workflow His<br><u>View workfl</u><br>The following e | ins or this workflow stops res<br>workflow now.<br>asks have been assigned to the<br>J, Sundeep R<br>tory<br>ow reports<br>events have occurred in this w   | ponding, it can be terminated.<br>he participants in this workflo<br>Trite<br>Exception - Re<br>vorkflow. | Terminating the workflow wi | I set its status to C<br>can also view thes<br>Due Date  | anceled and will delete all<br>the tasks in the list Workflow<br>Status<br>Not Started | v Tasks.<br>Outcome<br>Pending                  |

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Supplier Portal System Version 1.0 VCR#

Basic Functions Work Flows

| Exce    | eption Report - View Workflow Reports  |
|---------|--|
| Use the | ese reports to monitor how your business processes are running based on the history information of those workflows.  |
| Go Go   | Back to Exception Report   |
| Exc     | eption Report Approval   |
| 1       | Activity Duration Report<br>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<br>Use this report to see which workflows are being canceled or encounter errors before completion.  |
| Exc     | eption Report Approval (Previous Version:1/23/2011 3:05:21 PM)   |
| •       | Activity Duration Report<br>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. |
| 1       | Cancellation & Error Report<br>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 Highwry |  |  |  |  |  |  |  |
| 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<br>QA            | 1/25/2011  |  |  |  |  |  |  |  |

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| Workflow Status                            |                         |                   |                            |
|--|-------------------------|-------------------|----------------------------|
|  |                         |                   |                            |
| Nintex workflows that are running for this | s list item.            |                   |                            |
| Running Workflows                          |                         |                   |                            |
| Name                                       | Started by              | Started           | Idle time                  |
| Exception Report Approved                  | 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                      |



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| Detailed history of this workflow.                    |                   |                |               |           |
|---|-------------------|----------------|---------------|-----------|
| Show graphical hiew                                   |                   |                |               |           |
| Action History  |                   |                |               |           |
| Action  | Start             | End            |               | Duration  |
| Primary QA Approval Reminder                          | 2/23/2011 4:18 PM | inco           | mplete        |           |
| Primary QA Approval                                   | 2/23/2011 4:18 PM | inco           | mplete        |           |
| Primary QA Approval with Reminder                     | 2/23/2011 4:18 PM | inco           | mplete        |           |
| 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 | inco           | mplete        |           |
| 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 | inco           | mplete        |           |
| Task History  |                   |                |               |           |
| Task: Primary QA Approval. Started at: 2/23/2011 4:18 | PM                |                |               |           |
| User  | Assigned Time     | Completed Time | Outcome       | Comments  |
| Thikkavarapu, Sundeep R                               | 2/23/2011 4:18 PM | incomplete     | Pending       |           |
| Workflow Messages                                     |                   |                |               |           |

• Click on Show graphical view to return to the workflow process diagram

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GPO Procurement Content Specific Details

## 3. GPO PROCUREMENT

# 3.1. Content Specific Details

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Supplier Management SRM Suppliers and Governance Teams

## 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

| GPO PROCUREMENT HOME | SUPPLIER MA | NAGEMEN | THIRD PARTY MANUFACTURING | PURCHASING | QUALITY ASSURANCE 🔻 | EXTERNAL SITE |
|----------------------|-------------|---------|---------------------------|------------|---------------------|---------------|
|                      |             |         |                           |            |                     |               |

• In the Quick Launch area, select Suppliers Governance Teams



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

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Abbott Laboratories – Global Pharmaceutical Operations (GPO – IT)



Supplier Management SRM Suppliers and Governance Teams



• Expand the desired Supplier for details.

| GI   | PO P  | PROCUREMENT HO                | ME SU     | IPPLIER MANAGEMENT                           | THIRD PARTY MA       | ANUFACTURING        | PUR | CHASING   | QUALITY ASSURANCE  | ~ | EXTERNAL SITES 🗢  |   |                                | Site Ac | ctions |
|------|---|-------------------------------|-----------|--|----------------------|---------------------|-----|---|--|---|---|---|--------------------------------|---------|--------|
| GP   | GPO Procurement Home > Supplier Management > Suppliers Governance Teams |                               |           |  |                      |                     |     |   |  |   |   |   |                                |         |        |
| Su   | Suppliers Governance Teams  |                               |           |  |                      |                     |     |   |  |   |   |   |                                |         |        |
| Nev  | ۷.  | <ul> <li>Actions -</li> </ul> | Setting   | s <del>*</del>                               |                      |                     |     |   |  |   |   | View:   | All Item                       | S       | •      |
| U    | s   | Supplier URL                  |           | Team Member                                  |                      | Role                | Key | Responsib   | lities   |   | Summary   |   |                                | Edit    | Туре   |
| 🗆 Su | ppl   | ier : Alcan Pack              | aging (2) |  |                      |                     |     |   |  |   |   |   |                                |         |        |
|      | v   | www.alcanpacka                | iging.com | Connie Savovich, GP<br>Director, Corp. Purch | O, ADD, Sr.<br>asing | Abbott<br>Executive |     | <ul> <li>Top-to-</li> <li>SRM pr</li> <li>Review strategi</li> <li>Presen (e.g. qu)</li> </ul>        | top relationship mgmt<br>ogram sponsorship<br>and oversight of SRM<br>/<br>ce in executive reviews<br>arterly reviews) | 5 | <ul> <li>Presence in supplie<br/>appropriate</li> <li>Commitment of reso<br/>maintain effective r</li> <li>Communication of d<br/>discontinuations to</li> <li>Final point for escai</li> </ul> | r negotiation<br>purces requi<br>elationships<br>ivestitures o<br>supplier<br>lation resolu | ns as<br>ired to<br>or<br>tion |         |        |
|      | v   | www.alcanpacka                | iging.com | Dennis Williams, GPC<br>Sales                | 9, ADD, V.P. /       | Executivex          |     | <ul> <li>Top-to-</li> <li>SRM pr</li> <li>Review<br/>strategy</li> <li>Presen<br/>(e.g. qu</li> </ul> | top relationship mgmt<br>ogram sponsorship<br>and oversight of SRM<br>v<br>ce in executive reviews<br>arterly reviews) | ł | <ul> <li>Presence in supplie<br/>appropriate</li> <li>Commitment of reso<br/>maintain effective r</li> <li>Communication of d<br/>discontinuations to</li> <li>Final point for escal</li> </ul> | r negotiation<br>nurces requi<br>elationships<br>ivestitures o<br>supplier<br>lation resolu | ns as<br>ired to<br>or<br>tion |         |        |

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

## 4.1.2. Add to Suppliers Governance Teams

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

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Supplier Management SRM Suppliers and Governance Teams



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

|                          |  | Calicer               |
|--------------------------|--|-----------------------|
| Attach File   🍄 Spelling | * indi   | cates a required fiel |
| Supplier *               | Alcan Packaging  |                       |
| Supplier URL *           | www.alcanpackaging.com   |                       |
| Role                     | Abbott Executive   |                       |
|                          | <ul> <li>Top-to-top relationship mgmt</li> <li>SRM program sponsorship</li> </ul>  | -                     |
|                          | <ul> <li>Review and oversight of SRM strategy</li> <li>Presence in executive reviews (e.g. quarterly</li> </ul>  | reviews)              |
| Summary                  | <ul> <li>Review and oversight of SRM strategy</li> <li>Presence in executive reviews (e.g. quarterly</li> <li>A Al B I U   = = =   = = = = = = = = = = = = = =</li></ul> | reviews)              |

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

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Supplier Management SRM Suppliers and Governance Teams

# 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).

| 1 | ppliers Governance Teams              |  |                     |   |  |            |  |  |  |  |  |
|---|---------------------------------------|--|---------------------|---|--|------------|--|--|--|--|--|
| ٨ | <ul> <li>Actions • Setting</li> </ul> | s <b>-</b>   |                     |   | View: All Ite  | ms •       |  |  |  |  |  |
|   | Supplier URL                          | Team Member  | Role                | Key Responsibilities  | Summary  | Edit Type  |  |  |  |  |  |
| ų | pplier : Alcan Packaging (2)          |  |                     |   |  | $\bigcirc$ |  |  |  |  |  |
|   | www.alcanpackaging.com                | Connie Savovich, GPO, ADD, Sr.<br>Director, Corp. Purchasing | Abbott<br>Executive | <ul> <li>Top-to-top relationship mgmt</li> <li>SRM program sponsorship</li> <li>Review and oversight of SRM<br/>strategy</li> <li>Presence in executive reviews<br/>(e.g. quarterly reviews)</li> </ul> | <ul> <li>Presence in supplier negotiations as<br/>appropriate</li> <li>Commitment of resources required to<br/>maintain effective relationships</li> <li>Communication of divestfures or<br/>discontinuations to supplier</li> <li>Final point for escalation resolution</li> </ul>  | Edit       |  |  |  |  |  |
|   | www.alcanpackaging.com                | Dennis Williams, GPO, ADD, V.P. /<br>Sales                   | Executivex          | <ul> <li>Top-to-top relationship mgmt</li> <li>SRM program sponsorship</li> <li>Review and oversight of SRM strategy</li> <li>Presence in executive reviews (e.g. quarterly reviews)</li> </ul>         | <ul> <li>Presence in supplier negotiations as<br/>appropriate</li> <li>Commitment of resources required to<br/>maintain effective relationships</li> <li>Communication of divestitures or<br/>discontinuations to supplier</li> <li>Final point for escalation resolution</li> </ul> |            |  |  |  |  |  |

• The Suppliers Governance Teams edit window is displayed.

| Suppliers Governance Teams: www.alcanpackaging.com |   |  |                    |  |  |  |
|--|---|--|--------------------|--|--|--|
|  |   | ОК   | Cancel             |  |  |  |
| 🔋 Attach File   🗙 Delete Item   🍄 Sp               | elling  | * indicate:                                  | s a required field |  |  |  |
| Supplier*  | Alcan Packaging   |  |                    |  |  |  |
| Supplier URL *                                     | www.alcanpackaging.com  |  |                    |  |  |  |
| Role   | Abbott Executive  |  |                    |  |  |  |
| Key Responsibilities                               | A Al B I U   E E E   E E E E E E E E E E E E E E  | 譚 શ 🛕 🔇<br>gy<br>quarterly revi              | ews)               |  |  |  |
| Summary  | <ul> <li>A Al   B I U   ■ ■ ■   □ □ □ □ □</li> <li>Presence in supplier negotiations as</li> <li>Commitment of resources required effective relationships</li> <li>Communication of divestitures or dissupplier</li> <li>Final point for escalation resolution</li> </ul> | appropriate<br>to maintain<br>scontinuations | to                 |  |  |  |
| Team Member  | Connie Savovich, GPO, ADD, Sr. Director, Corp. Pur  | chasing                                      |                    |  |  |  |

• Make all changes from this screen.

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Supplier Management Supplier Selection Tool

• Click OK when completed.

# 4.2. Supplier Selection Tool

• Click on the Supplier Management Link

|              | GPO Procurement Home  |  |
|--------------|---|--|
|              |   | This Site: GPO Procurement Home        |
|              | GPO PROCUREMENT HOME SUPPLIER MANAGEMENT THIRD PARTY MANUFACTURING PURCHASING | QUALITY ASSURANCE 🗢 🛛 EXTERNAL SITES 🗢 |
| Repositories | 4   |  |

• Click on the Supplier Selection link in the Quick Launch area



• The Supplier Selection Tool page is displayed.

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Supplier Management Supplier Selection Tool

| Supplier Se              | election Tool                               |                  |                  |                    |                   |                |                |                |
|--------------------------|---|------------------|------------------|--------------------|-------------------|----------------|----------------|----------------|
| Material :               |   | Date : 1/28/2011 | Pro              | oject Name:        |                   |                |                |                |
| Must Have C              | riteria                                     | 1                | (Please enter su | pplier names in th | e textboxes belov | w!)            |                |                |
| Category                 | Criteria                                    |                  |                  |                    |                   |                |                |                |
| Quality                  | Quality Manual                              |                  |                  |                    |                   |                |                |                |
| Quality                  | Material Specification                      |                  |                  |                    |                   |                |                |                |
| Financial                | Financial Stability                         |                  |                  |                    |                   |                |                |                |
|                          | Results of Must<br>Have Criteria:           | NOT ACCEPTABLE   | NOT ACCEPTABLE   | NOT ACCEPTABLE     | NOT ACCEPTABLE    | NOT ACCEPTABLE | NOT ACCEPTABLE | NOT ACCEPTABLE |
| Scored Crite             | ria   |                  |                  |                    |                   |                |                |                |
| Social<br>Responsibility | Global Citizenship                          | 1                | 1 💌              | 1                  | 1 💌               | 1              | 1 💌            | 1 💌            |
| Service                  | Delivers / Agrees to<br>Deliver per Class A | 1 💌              | 1 💌              | 1 💌                | 1 💌               | 1 💌            | 1 💌            | 1 💌            |
| Financial                | test criteria added by<br>Dhanya            | 1 💌              | 1                | 1                  | 1                 | 1              | 1              | 1 💌            |
|                          | Comments:                                   | A                | A                | A                  | A                 | A              | A              | ×              |
|                          | ·   |                  | ·                |                    | ·                 |                |                | Submit         |

- 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.

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

| 1111 | SupplierSelectionToolCategoryMaster   |   | •                       | 1/26/2011 |
|------|---------------------------------------|---|-------------------------|-----------|
|      | SupplierSelectionToolChartData        |   | Open Link in New Window | 1/28/2011 |
|      | SupplierSelectionToolComments         |   | New ท                   | 📑 Item 🔵  |
|      | SupplierSelectionToolCriteriaMaster   | × | Delete                  | 1/28/2011 |
|      | SupplierSelectionToolMustHaveCriteria |   | Edit Properties         | 1/28/2011 |
|      | SupplierSelectionToolScoredCriteria   |   |                         | 1/28/2011 |

• This opens the SupplierSelectionToolCategoryMaster: New Item page.

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| SupplierSelectionTo       | oolCategoryMaster: New Item |                              |
|---------------------------|-----------------------------|------------------------------|
|                           |                             | OK Cancel                    |
| I Attach File   Spelling. |                             | * indicates a required field |
| CategoryName *            | Training                    |                              |
| Weightage *               | 30 %                        |                              |
|                           |                             | OK Cancel                    |

- 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.

| Category Name * | Financial              |
|-----------------|------------------------|
|                 | Financial              |
|                 | Innovation             |
|                 | Other                  |
|                 | Quality                |
|                 | Service                |
|                 | SharePoint Training    |
|                 | Social Responsibility  |
|                 | Training Category Name |

 All categories are displayed by clicking on the SupplierToolSelectionCategoryMaster link.

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Supplier Management Supplier Selection Tool

| SupplierSelectionToolCategoryMaster - All Items |  |           |
|---|--|-----------|
| 🔰 Up New Actions 🔹 Settings 🕶                   | Show Related Resources View: All Items - |           |
| Attachments                                     | CategoryName                             | Weightage |
| False   | Quality                                  | 30 %      |
| False   | Service                                  | 30 %      |
| False   | Financial                                | 30 %      |
| False   | Innovation                               | 5 %       |
| False   | Social Responsibility                    | 2 %       |
| False   | Other                                    | 3 %       |
| T False   | SharePoint Training                      | 10 %      |
| 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 |
| E False   | Quality                |                         | 30 %      |
| False   | Service                |                         | 30 %      |
| Talse   | Financial              |                         | 30 %      |
| False   | Innovation             |                         | 5 %       |
| E False   | Social Responsibility  |                         | 2 %       |
| False   | Other                  |                         | 3 %       |
| False   | SharePoint Training    |                         | 10 %      |
| False   | Training               |                         | 30 %      |
|   |                        | Open Link in New Window |           |
|   |                        | 🗙 Delete                |           |
|   |                        | 🖹 Сору                  |           |
|   |                        | 🖹 Move                  |           |
|   |                        | View Properties         |           |
|   |                        | 🞲 Edit Properties 🖓     |           |
|   |                        | Janage Permissions      |           |
|   |                        | Version History         |           |
|   | -                      |                         |           |

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Supplier Management Supplier Selection Tool

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

| SupplierSelectionToolCategoryMaster: Training                           |  |       |  |  |
|---|--|-------|--|--|
|   |  | Close |  |  |
| 🛋 New Item   🗊 Edit Item   🗙 I  | Delete Item   📲 Manage Permissions   Alert Me   🖀 Workflow History |       |  |  |
| CategoryName  | Training   |       |  |  |
| Weightage   | 30%  |       |  |  |
| Created at 1/28/2011 1:07 PM by H<br>Last modified at 1/28/2011 1:07 PM | auenstein, Rick R<br>by Hauenstein, Rick R                         | Close |  |  |

## 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.

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

|      | SupplierSelectionToolCategoryMaster   |   |                         |   | 1/26/2011  |
|------|---------------------------------------|---|-------------------------|---|------------|
|      | SupplierSelectionToolChartData        |   |                         |   | 1/28/2011  |
|      | SupplierSelectionToolComments         |   |                         |   | 1/28/2011  |
|      | SupplierSelectionToolCriteriaMaster   |   |                         | • | 1/28/2011  |
| 1111 | SupplierSelectionToolMustHaveCriteria |   | Open Link in New Window |   | 1/28/2011  |
|      | SupplierSelectionToolScoredCriteria   |   | New dhy                 | • | 📑 Item     |
|      | Tasks                                 | × | Delete                  |   | 9/30/2010  |
| 66   | Templates                             |   | Edit Properties         |   | 12/30/2010 |
| TST. | Workflow Tasks                        |   |                         |   | 12/5/2010  |

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• This opens the SupplierSelectionToolCriteriaMaster: New Item page.

| Attach File   Spelling criteria Name *               | SharePoint CBT   | 0 | K indicates a | Cancel<br>required field |
|--|--|---|---------------|--------------------------|
| Attach File   ABC Spelling criteria Name * Weightage | SharePoint CBT   | ÷ | indicates a   | required field           |
| criteria Name *                                      | SharePoint CBT   |   |               |                          |
| Weightage  | %  |   |               |                          |
| Weightage  |  |   |               |                          |
| Rate1  |  |   |               |                          |
| Rate2  |  |   |               |                          |
| Rate3  |  |   |               |                          |
| MustHave   |  |   |               |                          |
| Category Name *                                      | Training<br>Financial<br>Innovation<br>Other<br>Quality<br>Service<br>SharePoint Training<br>Social Desponsibility | 0 | к             | Cancel                   |
|  | Training   |   |               | Loc                      |

- 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.

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Supplier Management Supplier Selection Tool

| SupplierSelectionTo        | olCriteriaMaster: New Item   |             |                    |
|----------------------------|--|-------------|--------------------|
|                            |  | ок          | Cancel             |
| 🕼 Attach File   🍄 Spelling |  | * indicate: | s a required field |
| criteria Name *            | SharePoint CBT   |             |                    |
| Weightage                  | %  |             |                    |
| Rate1                      | [  |             |                    |
| Rate2                      | [  |             |                    |
| Rate3                      | [  |             |                    |
| MustHave                   |  |             |                    |
| Category Name *            | Training<br>Financial<br>Innovation<br>Other<br>Quality<br>Service<br>SharePoint Training<br>Social Responsibility | ОК          | Cancel             |
|                            | Training   |             | Loca               |

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

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Supplier Management Supplier Selection Tool

| SupplierSelectionToolCriteri  | aMaster: SharePoint User Guide   |             |                    |
|---|--|-------------|--------------------|
|   |  | ОК          | Cancel             |
| 🖞 Attach File   🗙 Delete Item   💞 Spe   | elling   | * indicates | s 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<br>Last modified at 2/17/2011 2:47 PM by Liu | Financial P<br>Innovation<br>Other<br>Quality<br>Service<br>SharePoint Training<br>Social Responsibility<br>Training | ОК          | 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<br>Have Criteria: | NOT ACCEPTABLE | NOT ACCEPTABLE |
|--------------------------|-----------------------------------|----------------|----------------|
| Scored Criter            | ia                                |                |                |
| Training                 | SharePoint User<br>Guide          |                | 1              |
| Social<br>Responsibility | Global Citizenship                | 3              | 1 💌            |

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Supplier Portal System Version 1.0 VCR# Supplier Management Supplier Selection Tool

| Supplier Se              | election Tool                               |                   |                  |                    |                   |                |                |                |
|--------------------------|---|-------------------|------------------|--------------------|-------------------|----------------|----------------|----------------|
| Material :               |   | Date : 1/28/2011  | Pro              | ject Name:         |                   |                |                |                |
| Must Have C              | riteria                                     |                   | (Please enter su | oplier names in th | e textboxes belov | w!)            |                |                |
| Category                 | Criteria                                    |                   |                  |                    |                   |                |                |                |
| Training                 | SharePoint CBT                              | New Criteria with | "MustHave" sele  | ted 🗆              |                   |                |                |                |
| Quality                  | Quality Manual                              |                   |                  |                    |                   |                |                |                |
|                          | Results of Must<br>Have Criteria:           | NOT ACCEPTABLE    | NOT ACCEPTABLE   | NOT ACCEPTABLE     | NOT ACCEPTABLE    | NOT ACCEPTABLE | NOT ACCEPTABLE | NOT ACCEPTABLE |
| Scored Crite             | ria   |                   |                  |                    |                   |                |                |                |
| Training                 | SharePoint User's                           | New Criteria with | "MustHave" dese  | ected              | 0 💌               | 0 💌            | 0 💌            | 0 💌            |
| Social<br>Responsibility | Global Citizenship                          | 1 💌               | 1 💌              | 1                  | 1 💌               | 1 💌            | 1 💌            | 1 💌            |
| Service                  | Delivers / Agrees to<br>Deliver per Class A | 1                 | 1                | 1                  | 1 💌               | 1              | 1              | 1              |
| Financial                | test criteria added by<br>Dhanya            | 1                 | 1                | 1 💌                | 1 💌               | 1 💌            | 1 💌            | 1              |
|                          | Comments:                                   | A V               | 4                | ×                  | 4                 |                | *              |                |
|                          |   | 1                 | 1                | 1                  |                   | 1              |                | Submit         |

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# 5. SUPPLIER COLLABORATION

#### 5.1. Create New Supplier

• Select Supplier Management from the site bar.

| Supplier Ma          | anagement            |                           |            |                     |                     | A Promise for Life |
|----------------------|----------------------|---------------------------|------------|---------------------|---------------------|--------------------|
|                      | Ŭ                    |                           |            | This Site: Sup      | oplier Management 💌 | go                 |
| GPO PROCUREMENT HOME |                      | THIRD PARTY MANUFACTURING | PURCHASING | QUALITY ASSURANCE 🔻 | EXTERNAL SITES 🗢    | Site Actions 🔻     |
|                      | Ŭ                    |                           |            |                     |                     |                    |
| GPO Procurement Home | > Supplier Managemei | nt                        |            |                     |                     |                    |

• Select *Suppliers* from the Quick Launch area.



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

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| Suppliers    |                |                   |                 |                                 |
|--------------|----------------|-------------------|-----------------|---------------------------------|
| New  Actions |                |                   |                 |                                 |
| Supplier h   |                | Supplier Location | Supplier Region | Supplier URL                    |
| Create a ne  | w supp_r       | 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  |             |             |                    |
|--|-------------|-------------|--------------------|
|  |             | ОК          | Cancel             |
| 🔋 Attach File   🗙 Delete Item   🍄 Si                                     | pelling     | * indicates | s 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<br>Last modified at 1/25/2011 2:00 PM by |             | ОК          | Cancel             |

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

| Supplier Region * |                |
|-------------------|----------------|
| Create Site       | Biologics      |
|                   | EU<br>LAC      |
|                   | PAJAEM<br>USPR |

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- 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 limted to, the following
  - o Documents
  - o Calendar
  - o New Open Items
  - o Add an Open Item
  - o 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.

| Suppliers    |                 |                   |                 |                                 |                 |      |
|--------------|-----------------|-------------------|-----------------|---------------------------------|-----------------|------|
| New • Action | ns - 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     | Rejina          | Woodstock         | LAC             | Rejina - 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.

| Suppliers   |                 |                   |                 |                                 |                 |       |
|-------------|-----------------|-------------------|-----------------|---------------------------------|-----------------|-------|
| New • Actio | ns - 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    | Rejina          | Woodstock         | LAC             | Rejina - Woodstock              |                 |       |
| NancyID     | Supplier Nancy  | LC                | USPR            | Supplier Nancy - LC             |                 |       |
| SP0001      | SharePoint      | Lake County       | USPR            | SharePoint - Lake County        |                 | JR.   |
| USPRSU0039  | Airgas Inc      | Bozrah, CT, USA   | USPR            | Airgas Inc - Bozrah, CT, USA    |                 | - Fdi |
| 10000000000 | A.1             | 07                | 11000           | 11                              |                 | 100   |

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

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| Suppliers: SharePoint - Lake County                                      |             |             |                  |  |  |
|--|-------------|-------------|------------------|--|--|
|  |             | ОК          | Cancel           |  |  |
| 🔋 Attach File   🗙 Delete Item   🍄 Sj                                     | pelling     | * 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<br>Last modified at 1/25/2011 2:00 PM by |             | ОК          | 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
  - o the supplier site can be omitted by deselecting the *Create Site* checkbox.
  - o 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 • Action | ns - 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     | Rejina          | Woodstock         | LAC             | Rejina - 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:

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| Suppliers   |                 |                   |                 |                                 |
|-------------|-----------------|-------------------|-----------------|---------------------------------|
| New - Actio | ns 🔹 Settings 🔹 |                   |                 |                                 |
| 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 Compty        |
| 110000000   | Airase lao      | Borrah CT USA     | LISDD           | Aireas Inc. Bezrah 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.

| SharePoint - Lake County                         |                                       | A Promise for Life   |
|--|---------------------------------------|--|
|  | This Site: SharePoint - Lake County 💌 | go   |
| SHAREPOINT - LAKE COUNTY SUPPPLIER COLLABORATION |                                       | Site Actions 🔻   |
|  | ×                                     | Create Page<br>Create a page in this site.   |
| workspace for sharePoint - Lake County           |                                       | Edit Page<br>Add, renthe, or update Web Parts on<br>this page                                |
|  |                                       | View All Site Content<br>View all libraries and lists in this site.                          |
|  |                                       | View Reports<br>View reports on documents, pages<br>and tasks.                               |
|  |                                       | Site Settings<br>Manage site settings on this site.  |
|  | 霖                                     | Manage Content and Structure<br>Reorganize content and structure in<br>this site collection. |

## 5.2. SRM Open Item Log

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

| GPO Procurement Home > Supplier Collaboration TPM Collaboration | GPO PROCUREMENT HOME | SUPPLIER MANAGEMENT   | THIRD PARTY MANUFACTURING | PURCHASING | QUALITY ASSURANCE 🔻 | EXTERNAL SITES 🔻  |
|---|----------------------|-----------------------|---------------------------|------------|---------------------|-------------------|
| GPO Procurement Home > Supplier Collaboration TPM COLLABORATION |                      |                       |                           |            |                     |                   |
|   | GPO Procurement Home | Supplier Collaboratio | n                         |            |                     | TPM COLLABORATION |

• Select Open Items Log from the Quick Launch area.

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Supplier Collaboration SRM Open Item Log

| Surveys                            |  |  |
|------------------------------------|--|--|
| Repositories                       |  |  |
| Shared Documents                   |  |  |
| Lists                              |  |  |
| Open Items Log                     |  |  |
| Supplier Change<br>Notification    |  |  |
| SRM GAP Assessment<br>Comments     |  |  |
| SRM GAP Assessment<br>Results      |  |  |
| GAP Assessment Survey<br>Templates |  |  |
| Quick Links                        |  |  |
| SRM GAP Assessment<br>Survey       |  |  |
| Sites                              |  |  |
| People and Groups                  |  |  |
| Precycle Bin                       |  |  |

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



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Supplier Collaboration SRM Open Item Log

• The Open Items Log: New Item form is displayed.

| Open Items Log: New Item   |                            |                   |                  |
|----------------------------|----------------------------|-------------------|------------------|
|                            |                            | ОК                | Cancel           |
| 🔋 Attach File   🍣 Spelling |                            | * indicates       | a required field |
| SupplierID *               |                            |                   |                  |
| Supplier Name              |                            |                   |                  |
| Supplier Location          |                            |                   |                  |
| Supplier Region            |                            |                   |                  |
| Open Item *                |                            |                   |                  |
| Category                   |                            |                   |                  |
| Description                |                            | E (#   <u>A</u> 🖗 | मेगा गां4        |
| WorkStream *               |                            |                   |                  |
| Priority *                 |                            |                   |                  |
| Owner                      |                            |                   | 8./ 🗓            |
| Status                     | Open 💌                     |                   |                  |
| DueDate                    |                            |                   |                  |
| Notes                      | A AÌ B I U   ≣ ≣ ≡   ⊟ ⊟ ∰ | E (#   <u>A</u> 📎 | >T TI4           |
| DateLogged *               | 2/17/2011                  |                   |                  |
|                            |                            | ОК                | Cancel           |

• Enter the following:

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Supplier Collaboration SRM Open Item Log

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

| Category    |  |   |
|-------------|--|---|
| Description | Issue tegory = = =   H H # #   A 🖄 M 🗤 |   |
|             | Opportunity                            | - |

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

| WorkStream * |                            |
|--------------|----------------------------|
| Priority *   | Systems Integration        |
| Owner        | Data Quality<br>Pilots     |
| Status       | Process<br>Benchmarking    |
| DueDate      | Training<br>Communications |
| Notes        | Governance<br>PMO<br>All   |

• Priority (Required) - no default value.

| Priority * |               | ì       |
|------------|---------------|---------|
| Owner      | High          | riority |
| Status     | Medium<br>Low | ]       |

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

| Owner  | Sec. 1997 | <del>ر</del> |
|--------|-----------|--------------|
| Status | Open 💌    | Browse       |

o Status – The default Value is Open.

| Global | Pharmaceutical | Operations |
|--------|----------------|------------|
|--------|----------------|------------|

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Supplier Collaboration SRM Open Item Log

| Status  | Open           |
|---------|----------------|
| DueDate | Open<br>Closed |
| Noton   | Deferred       |

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

| DueDate      |            |                 |            |      |       |      |     |                                      |
|--------------|------------|-----------------|------------|------|-------|------|-----|--------------------------------------|
| Notes        | •          | F               | ebri       | uary | 201   | 1    | P), | )<br>Select a date from the calendar |
|              | S          | М               | т          | W    | т     | F    | S   |                                      |
|              | 30         | 31              | 1          | 2    | 3     | 4    | 5   |                                      |
|              | 6          | 7               | 8          | 9    | 10    | 11   | 12  |                                      |
|              | 13         | 14              | 15         | 16   | 17    | 18   | 19  |                                      |
|              | 20         | 21              | 22         | 23   | 24    | 25   | 26  |                                      |
| DateLogged * | 27         | 28              | 1          | 2    | 3     | 4    | 5   |                                      |
|              | Tod<br>Thu | day is<br>ursda | s<br>ay, F | ebru | ary 1 | 7, 2 | 011 | ок                                   |

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

| eLogged * | 2/1        | 7/20            | 11         |       |       |      | <b>P</b> | η |
|-----------|------------|-----------------|------------|-------|-------|------|----------|---|
|           | •          | F               | ebru       | uary, | , 201 | 1    | •        | 1 |
|           | S          | М               | т          | W     | т     | F    | S        |   |
|           | 30         | 31              | 1          | 2     | 3     | 4    | 5        |   |
|           | 6          | 7               | 8          | 9     | 10    | 11   | 12       |   |
|           | 13         | 14              | 15         | 16    | 17    | 18   | 19       | m |
|           | 20         | 21              | 22         | 23    | 24    | 25   | 26       |   |
|           | 27         | 28              | 1          | 2     | 3     | 4    | 5        |   |
|           | Too<br>Thu | lay is<br>Irsda | s<br>ay, F | ebru  | ary 1 | 7, 2 | 011      |   |

- Sample Open Item Log
  - o New Open Item form

**Global Pharmaceutical Operations** 

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Supplier Portal System Version 1.0 VCR#

Supplier Collaboration SRM Open Item Log

| Open items Log: New ite    | em  |             |                  |
|----------------------------|---|-------------|------------------|
|                            |   | ОК          | 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                | A A3 B I U 副書書 短短篇                        | 律  🗛 🖄      | ►π π4            |
|                            | System down, waiting on replacement part  | t(s)        | <u></u>          |
|                            |   |             |                  |
|                            |   |             | <b>V</b>         |
| WorkStream *               | Systems Integration                       |             |                  |
| Priority *                 | Medium 💌                                  |             |                  |
| Owner                      |   |             | S- 🗊             |
| Status                     | Deferred 💌                                |             |                  |
| DueDate                    | 2/22/2011                                 |             |                  |
| Notes                      | A ALIB Z U   E E E   E E F                | 律  🗛 🖄      | ▶ণা শাৰ          |
|                            | Dell contact: Roger Taylor, 512-555-2800x | (2525       | <u> </u>         |
|                            |   |             |                  |
|                            |   |             | <b>~</b>         |
| DateLogged *               | 2/17/2011                                 |             |                  |
|                            |   | ОК          | Cancel           |
|                            |   |             |                  |

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

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Supplier Collaboration SRM Open Item Log

| Open Iter      | ns Log                    |                  |                        |          |                   |   |           |            |                   |                   |                 |               |
|----------------|---------------------------|------------------|------------------------|----------|-------------------|---|-----------|------------|-------------------|-------------------|-----------------|---------------|
| New - A        | ctions - Settin           | ngs <del>-</del> |                        |          |                   |   |           |            |                   | ,                 | View: All Items | •             |
| Category       | Title                     | Status           | WorkStream             | Priority | Owner             | Description   | DueDate   | DateLogged | Supplier Name     | Supplier Location | Supplier Region | Open Item     |
| ∃ SupplierID : | Dell6869 (1)              |                  |                        |          |                   |   |           |            |                   |                   |                 |               |
| 🗎 Status : De  | ferred (1)                |                  |                        |          |                   |   |           |            |                   |                   |                 |               |
| Issue          | Open Items<br>Log I NEW   | Deferred         | Systems<br>Integration | Medium   | Smith,<br>James T | System down,<br>waiting on<br>replacement part<br>(s) | 2/22/2011 | 2/17/2011  | Dell<br>Computers | Round Rock, TX    | US              | 100 GB<br>HDD |
| SupplierID:    | SupplierID: LACSU0001 (2) |                  |                        |          |                   |   |           |            |                   |                   |                 |               |
| SupplierID:    | LAC SU006 (1)             |                  |                        |          |                   |   |           |            |                   |                   |                 |               |

## 5.2.1. Submit a New Change Notification

• Under External Sites, selct Supplier Collaboration.

| GPO PROCUREMENT HOME | SUPPLIER MANAGEMENT | THIRD PARTY MANUFACTURING | PURCHASING | QUALITY ASSURANCE 🗢 | EXTERNAL SITES 👻     |                  | Site Actions |
|----------------------|---------------------|---------------------------|------------|---------------------|----------------------|------------------|--------------|
|                      |                     |                           |            |                     | SUPPLIER COLLABORATO | N                |              |
| Mission              |                     |                           |            |                     | TPM COLLABORATION    | hlights & Events | ~            |

• Click Supplier Change Notification under the Quick Launch area.

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Supplier Collaboration SRM Open Item Log

| Repositories                       |
|------------------------------------|
| Shared Documents                   |
| Lists                              |
| Open Items Log                     |
| Supplier Change<br>Notification    |
| SRM GAP Assessment<br>Comments     |
| SRM GAP Assessment<br>Results      |
| GAP Assessment Survey<br>Templates |
| Quick Links                        |
| SRM GAP Assessment<br>Survey       |
| Sites                              |
| People and Groups                  |
| Recycle Bin                        |

• Select New item under the New tab.

| Supplier C                         | hange Notification         |              |                   |                 |                              |                             |                     |
|------------------------------------|----------------------------|--------------|-------------------|-----------------|------------------------------|-----------------------------|---------------------|
| New - Acti                         | ons - Settings -           |              |                   |                 |                              |                             |                     |
| New Ite                            | m<br>National and a second | upplier Name | Supplier Location | Supplier Region | Supplier Contact Email       | Part Description            | Change Des          |
| Change<br>Notification             | w item to this list.       | EST          | TEST              |                 |                              | TEST BY<br>NANCY            |                     |
| Supplier<br>Change<br>Notification | In Progress                | Nancy        | LC                | USPR            |                              | test                        |                     |
| Supplier<br>Change<br>Notification | In Progress                | SharePoint   | Lake County       | USGPO           | lowell.hauenstein@abbott.com | SharePoint<br>User's manual | Added detai<br>SCN. |

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

| Global Pharmaceutical | Operations |
|-----------------------|------------|
|-----------------------|------------|

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Supplier Collaboration SRM Open Item Log

|                            |                        | ОК               | Cancel           |
|----------------------------|------------------------|------------------|------------------|
| 🖉 Attach File   💞 Spelling |                        | * indicate:      | a required field |
| SupplierID *               |                        |                  |                  |
| Supplier Name              |                        |                  |                  |
| Supplier Location          |                        |                  |                  |
| Supplier Region            |                        |                  |                  |
| Abbott Code                |                        |                  |                  |
| Supplier Part Number *     |                        |                  |                  |
| Part Description           | A Al B I U ≣ ≣ ≣ ⊟ ⊟ ∰ | 『 律   <u>A</u> 効 | ►¶ ¶4            |
| Change Description         | A Al B I U E E E E     | E (F) 🔺 🖄        |                  |
| Change Date *              |                        |                  |                  |
| Supplier Contact Email     |                        |                  |                  |
| Supplier Contact Phone     |                        |                  |                  |

• 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.

| Supplier Change Notification | n: New Item |            |                     |
|------------------------------|-------------|------------|---------------------|
|                              |             | ОК         | Cancel              |
| 🕼 Attach Elling / 🍄 Spelling |             | * indicate | es a required field |
| SupplierID *                 |             |            |                     |

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- 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 | on: New Item |    |        |
|------------------------------|--------------|----|--------|
| Name                         |              |    | Browse |
|                              |              | ОК | Cancel |

#### 5.2.3. View All Change Notifications

• Click Change Notifications under Quick Links.

| S  | Supplier Change Notification                      |                              |               |                   |                 |                              |                             |                     |  |  |
|----|---|------------------------------|---------------|-------------------|-----------------|------------------------------|-----------------------------|---------------------|--|--|
| Ne | w 🔹 Acti  | ons - Settings -             |               |                   |                 |                              |                             |                     |  |  |
| U  | Title   | Supplier Change Notification | Supplier Name | Supplier Location | Supplier Region | Supplier Contact Email       | Part Description            | Change Des          |  |  |
|    | Supplier<br>Change<br>Notification                | In Progress                  | TEST          | TEST              |                 |                              | TEST BY<br>NANCY            |                     |  |  |
|    | Supplier<br>Char( <sup>10</sup> )<br>Notification | In Progress                  | Nancy         | LC                | USPR            |                              | test                        |                     |  |  |
|    | Supplier<br>Change<br>Notification                | In Progress                  | SharePoint    | Lake County       | USGPO           | lowell.hauenstein@abbott.com | SharePoint<br>User's manual | Added detai<br>SCN. |  |  |

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Supplier Collaboration Open Item

## Supplier Change Notification: Supplier Change Notification

| 🖃 New Item   🗊 Edit Item   🗙    | Delete Item   🝓 Manage Permissions   🧭 Workflows   Alert Me   🚇 Workflow History |
|---------------------------------|--|
| SupplierID                      | NancyID  |
| 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 Close   |

Created at 1/25/2 u, N.nancy N Last modified at 1/25/2011 9:49 AM by Liu, N.nancy N

#### 5.3. **Open Item**

#### 5.3.1. Submit a New Open Item

- Click New Open Item under Quick Links. ٠
- Specifiy the desired information for the new open item. •
- Click Submit. •

|         | SUPPLIER MANAGEMENT | THIRD PARTY MANUFACTURING | PURCHASING | QUALITY ASSURANCE 🗢 | EXTERNAL SITES 🔻       | Site Actio       | ons 🔻 |
|---------|---------------------|---------------------------|------------|---------------------|------------------------|------------------|-------|
|         |                     |                           |            |                     | SUPPLIER COLLABORATION | 4                |       |
| Mission |                     |                           |            |                     | TPM COLLABORATION      | hlights & Events | ~     |

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Supplier Portal System Version 1.0 VCR#

#### Repositories

Shared Documents

#### Lists

Open Items Log Supplier Chang 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               |          |         |             |         |            |               |                   |   |
|------------------------------|----------|---------|-------------|---------|------------|---------------|-------------------|---|
| New  Actions  Settings       |          |         |             |         |            |               |                   |   |
| Add a new item to this list. | Priority | Owner O | Description | DueDate | DateLogged | Supplier Name | Supplier Location | s |
| SupplierID: LACSU0001 (2)    |          |         |             |         |            |               |                   |   |
| SupplierID: LACSU006 (1)     |          |         |             |         |            |               |                   |   |
| SupplierID : QuickBase (12)  |          |         |             |         |            |               |                   |   |
| SupplierID: SP0001 (1)       |          |         |             |         |            |               |                   |   |
| SupplierID: SUD2 (1)         |          |         |             |         |            |               |                   |   |
| SupplierID: SUPP0889 (4)     |          |         |             |         |            |               |                   |   |
| SupplierID: USPRSU0001 (1)   |          |         |             |         |            |               |                   |   |

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Supplier Collaboration Open Item

| Abbott Laboratories | - Globa | Pharmaceutical | Operations | (GPO - IT) |  |
|---------------------|---------|----------------|------------|------------|--|
|---------------------|---------|----------------|------------|------------|--|



Supplier Collaboration Open Item

# Open Items Log: New Item

|                            |                     | ОК                  | Cancel           |
|----------------------------|---------------------|---------------------|------------------|
| 🖉 Attach File   🍄 Spelling |                     | * indicates         | a required field |
| SupplierID *               |                     |                     |                  |
| Supplier Name              |                     |                     |                  |
| Supplier Location          |                     |                     |                  |
| Supplier Region            |                     |                     |                  |
| Open Item *                |                     |                     |                  |
| Category                   | <b>•</b>            |                     |                  |
| Description                | A Aî B I U ≣≣≣ ∃⊟ ∰ | = 詳  <u>A</u> 効)    | ना नार<br>       |
| WorkStream *               |                     |                     |                  |
| Priority *                 | T                   |                     |                  |
| Owner                      |                     |                     | 8/ 🗓             |
| Status                     | Open 🔽              |                     |                  |
| DueDate                    |                     |                     |                  |
| Notes                      |                     | E (#   <u>A</u> 🖄 ) | শা শাৰ<br>►      |
| DateLogged *               | 2/1/2011            |                     |                  |
|                            |                     | ОК                  | Cancel           |

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| Abbott Laboratories – Global Pł               | Abbott Laboratories – Global Pharmaceutical Operations (GPO – IT) |         |                              |  |  |
|---|---|---------|------------------------------|--|--|
| Supplier Portal<br>System Version 1.0<br>VCR# |   | Supplie | r Collaboration<br>Open Item |  |  |
| Open Items Log: New Item                      |   |         |                              |  |  |
|   |   | ок      | Cancel                       |  |  |

| 🕼 Attach Fire 🎝 Spelling | * indicates a required field |
|--------------------------|------------------------------|
| SupplierID *             |                              |

# Open Items Log: New Item

Use this page to add attachments to an item.

| Name |    | Br | rowrse<br>Name |
|------|----|----|----------------|
|      | ок |    | Cancel         |

## 5.3.2. View All Open Items

• Click Open Items Log under Quick Links.

| Repositories                                      |  |
|---|--|
| Shared Documents                                  |  |
| Lists   |  |
| Open Items Log<br>Supplier Change<br>Notification |  |
| SRM GAP Assessment<br>Comments                    |  |
| SRM GAP Assessment<br>Results                     |  |
| GAP Assessment Survey<br>Templates                |  |
| Quick Links                                       |  |
| SRM GAP Assessment<br>Survey                      |  |
| Sites   |  |
| People and Groups                                 |  |
| Recycle Bin                                       |  |
|   |  |
| Global Pharmaceutical Operations                  |  |

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Supplier Collaboration Open Item

| Open Items        | Log                     |        |                |          |            |                |             |            |               |                   |                 |                     |
|-------------------|-------------------------|--------|----------------|----------|------------|----------------|-------------|------------|---------------|-------------------|-----------------|---------------------|
| New • Acti        | ons • Settings •        |        |                |          |            |                |             |            |               |                   | View: All Item  | 15 -                |
| Category          | Title                   | Status | WorkStream     | Priority | Owner      | Description    | DueDate     | DateLogged | Supplier Name | Supplier Location | Supplier Region | Open Item           |
| BupplierID : LA   | AC SU0001 (2)           |        |                |          |            |                |             |            |               |                   |                 |                     |
| SupplierID : LA   | AC SU006 (1)            |        |                |          |            |                |             |            |               |                   |                 |                     |
| 🗄 SupplierID : Qu | uickBase (12)           |        |                |          |            |                |             |            |               |                   |                 |                     |
| SupplierID : SF   | <b>20001</b> (1)        |        |                |          |            |                |             |            |               |                   |                 |                     |
| SupplierID : SU   | JD2 (1)                 |        |                |          |            |                |             |            |               |                   |                 |                     |
| SupplierID : SU   | JPP0889 (4)             |        | Expand to viev | v the de | etails and | the status o   | of this ope | en item.   |               |                   |                 |                     |
| 🗏 Status : Open   | (4)                     |        |                |          |            |                |             |            |               |                   |                 |                     |
| Opportunity       | Open Item :<br>SUPP0889 | Open   | Communications | High     |            | desc           |             | 1/25/2011  | Rejina        | Woodstock         | LAC             | testing             |
| Issue             | Open Item :<br>SUPP0889 | Open   | Process        | Low      |            | descr          |             | 1/25/2011  | Rejina        | Woodstock         | LAC             | gssim               |
| Issue             | Open Item :<br>SUPP0889 | Open   | Data Quality   | Medium   |            | Test           |             | 1/26/2011  | Rejina        | Woodstock         | LAC             | Item Log1           |
| Opportunity       | Open Item :<br>SUPP0889 | Open   | Training       | High     |            | This is a test |             | 1/26/2011  | Rejina        | Woodstock         | LAC             | Test<br>opportunity |
| SupplierID : US   | SPRSU0001 (1)           |        |                |          |            |                |             |            |               |                   |                 |                     |

 SupplierID : SUD2 (1) ∃ SupplierID : SUPP0889 (4) G Status : Open (4) Opportunity Open Item SUPP0889 Communications High 1/25/2011 Rejina Woodstock Open desc Open Item : SUPP0889 Process Issue Open Low descr 1/25/2011 Rejina Woodstock Open Item; SUPP088 Open Data Quality Medium Test 1/26/2011 Rejina Woodstock Issue • This is a test Open Item SUPP0889 Opportunity Open Training High 1/26/2011 Rejina Woodstock SupplierID: USPRSU0001 (1)

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## Open Items Log: Open Item : SUPP0889

|   |              | Close |  |  |  |
|---|--------------|-------|--|--|--|
| 🚔 New Item   🗊 Edit Item   🗙 Delete Item   🐏 Manage Permissions   Alert Me   丛 Workflow History |              |       |  |  |  |
| SupplierID  | SUPP0889     |       |  |  |  |
| Supplier Name   | Rejina       |       |  |  |  |
| Supplier Location   | Woodstock    |       |  |  |  |
| Supplier Region   | LAC          |       |  |  |  |
| Open Item   | Item Log1    |       |  |  |  |
| Category  | Issue        |       |  |  |  |
| escription  | Test         |       |  |  |  |
| VorkStream  | Data Quality |       |  |  |  |
| Priority  | Medium       |       |  |  |  |
| )wner   |              |       |  |  |  |
| itatus  | Open         |       |  |  |  |
| JueDate   |              |       |  |  |  |
| lotes   |              |       |  |  |  |
| )ateLogged  | 1/26/2011    |       |  |  |  |

Last modified at 1/26/2011 7:41 AM by Thikkavarapu, Sundeep R

#### 5.4. **SRM GAP Assessment**

#### 5.4.1. Create a GAP Assessment Survey

- Preliminary requirements before a supplier can have a GAP Assessment ٠ Survey
  - Make sure the supplier is in the supplier list. Refer to Section 4.1.2 and 0 4.1.3 Supplier Governance Teams to verify/add suppliers.
  - Verify that there is a survey template available for the supplier. Refer to 0 Section Error! Reference source not found. Create Survey Template
  - 0
- Go to the Eternal Sites drop-down menu and select Supplier Collaboration. ٠

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

|                                    | Supplier Collaboration                        |
|------------------------------------|---|
|                                    | GPO PROCUREMENT HOME SUPPLIER MANAGEMENT 1    |
| Repositories<br>Shared Documents   | GPO Procurement Home > Supplier Collaboration |
| Lists                              |   |
| Open Items Log                     |   |
| Supplier Change<br>Notification    |   |
| SRM GAP Assessment<br>Comments     |   |
| SRM GAP Assessment<br>Results      |   |
| GAP Assessment Survey<br>Templates |   |
| Quick Links                        |   |
| SRM GAP Assessment<br>Survey       |   |

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

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- As shown in the following three illustrations, select:
  - o Select a Supplier from the drop-down menu
  - o 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

|  |                     | 1.10       |                |                 |                         |
|--|---------------------|------------|----------------|-----------------|-------------------------|
| Select A Supplier  |                     | ] [        |                |                 | ,0 50.01, 100.0         |
| Test Supplier1 - Test Location1 - USPRSU0001             |                     |            |                |                 | Welcome Hauenstein, Ric |
| TEST12 - TEST12 - LACSU0001                              |                     |            |                |                 |                         |
| Sudheer - LA - SUPP4576                                  |                     |            |                |                 |                         |
| Rejina - Woodstock - SUPP0889                            |                     |            |                |                 |                         |
| Supplier Nancy - LC - NancyID                            |                     |            |                |                 |                         |
| SharePoint - Lake County - SP0001                        |                     |            |                |                 |                         |
| Airgas Inc - Bozrah, CT, USA - USPRSU0039                |                     |            | Г              | This Site: Supp | lier Collaboration      |
| Airgas Inc Billerica MA, USA - USPRSU0040                |                     |            | L              |                 |                         |
| Aisan Chemical Co. Ltd Inazawa, Aichi, Japan - PAASU0014 |                     |            |                |                 |                         |
| Aisan Chemical Co. Ltd Inazawa, Aichi, Japan - PAASU0014 | MANUFACTURING       | PURCHASING | GUALITY AS     | SURANCE 🗢       | EXTERNAL SITES 🗢        |
| Ajay Europe s.a.r.i Evron, France - EUSU0019             |                     |            |                |                 |                         |
| Ajay-Sgm Chile - Santiago, Chile - LACSU0009             |                     |            |                |                 |                         |
| test - test - LACSU006                                   |                     |            |                |                 |                         |
| Sudheer1 - NY - SUD                                      |                     |            |                |                 |                         |
| Sudheer22 - NY - SUD2                                    |                     |            |                |                 |                         |
| Test - TEst 123 - TESTSME                                |                     |            |                |                 |                         |
| testt - test1321 - TESTSME1                              |                     |            |                |                 |                         |
| test - test - TESTSME2                                   |                     |            |                |                 |                         |
| test - test - TESTSME3                                   |                     |            |                |                 |                         |
| Test - Test - SME4                                       |                     |            |                |                 |                         |
| SME9 - test - SME9                                       | s                   |            |                |                 |                         |
| ACME Corporation - Lake County - LRH007                  |                     |            |                |                 |                         |
| Dell Computer - Austin, TX - DELL6869                    | Enter a Survey Nar  | ne *       | Select a Surve | v Template *    |                         |
| Hospira, Inc Lake Forrest, IL - HOS1502                  | citter a survey har | ile -      | select a surve | y remplate -    |                         |
| Select A Supplier  |                     |            | Select A Templ | ate 💌           | Create Survey           |
|  |                     |            |                |                 |                         |

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| M GAP Assessment Survey Manag           | ement                 |                            |               |
|---|-----------------------|----------------------------|---------------|
| * Required fields                       |                       |                            |               |
| Select an Option :                      | 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          |               |
|   |                       | nancy template             |               |
|   |                       | Regulated Substances       |               |
|   |                       | 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.

| Survey Created Successfully for Hosp<br>Required fields | bira, Inc Lake Forrest, IL. Click here to open th | e survey                   |            |
|---|---|----------------------------|------------|
| Select an Option : ③ Create Survey (                    | C Retrieve Survey Results                         |                            |            |
| Select a Supplier *                                     | Enter a Survey Name *                             | Select a Survey Template * |            |
| Select A Supplier                                       |   | Select A Template          | Create Sur |
|   |   |                            |            |

- 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.

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| Hospira, Inc L   | ake Forrest, IL        |  |  |  |  |
|--|------------------------|--|--|--|--|
| HOSPIRA, INC LAKE FORREST, IL  | UPPPLIER COLLABORATION |  |  |  |  |
| Hospira, Inc Lake Forrest, IL > HOS001   |                        |  |  |  |  |
| Respond to this Surality Actions   | Actions - Settings -   |  |  |  |  |
| Survey Name:   | Survey<br>HOS001       |  |  |  |  |
| Survey Description:  |                        |  |  |  |  |
| Time Created:  | 2/18/2011 1:36 PM      |  |  |  |  |
| Number of Responses:   | 0                      |  |  |  |  |
| <ul> <li>Show a graphical summary of respon</li> <li>Show all responses</li> </ul> | ses                    |  |  |  |  |

- 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.

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| Hospira, Inc L                       | ake Forrest, IL.        |
|--------------------------------------|-------------------------|
| HOSPIRA, INC LAKE FORREST, IL        | SUPPPLIER COLLABORATION |
| Hospira, Inc Lake Forrest, IL > H    | DS001                   |
| HOS001                               |                         |
| Respond to this Survey Actions       | Settings                |
|                                      |                         |
| Survey Name:                         | HOS001                  |
| Survey Description:                  |                         |
| Time Created:                        | 2/18/2011 1:36 PM       |
| Number of Responses:                 | 1                       |
| E. Show a graphical summary of reaso |                         |
| Show a graphical summary of respo    | nses                    |
| Show all responses                   |                         |

## 5.4.2. Retrieve Gap Assessment Survey Results

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

| IG | PURCHASING | QUALITY ASSURANCE 🗢 | EXTERNAL SITES 🗢         |
|----|------------|---------------------|--------------------------|
|    |            |                     |                          |
|    |            |                     | TPM COLLABORATION hlight |

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

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Supplier Collaboration SRM GAP Assessment

|                                    | Supplier Collaboration                        |
|------------------------------------|---|
|                                    | GPO PROCUREMENT HOME SUPPLIER MANAGEMENT      |
| Repositories<br>Shared Documents   | GPO Procurement Home > Supplier Collaboration |
| Lists                              |   |
| Open Items Log                     |   |
| Supplier Change<br>Notification    |   |
| SRM GAP Assessment<br>Comments     |   |
| SRM GAP Assessment<br>Results      |   |
| GAP Assessment Survey<br>Templates |   |
| Quick Links                        |   |
| SRM GAP Assessment<br>Survey       |   |

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

|   | RM GAP Assessment Survey Management              |                   |      |  |  |  |  |
|---|--|-------------------|------|--|--|--|--|
| Γ |  |                   |      |  |  |  |  |
|   | * Required fields                                |                   |      |  |  |  |  |
|   | Select an Option : O Create Survey ③ Retrieve Su | rvey Results      |      |  |  |  |  |
|   |  |                   |      |  |  |  |  |
|   | Select a Supplier *                              | Select a Survey * |      |  |  |  |  |
| L | Hospira, Inc Lake Forrest, IL - HOS1502          | IHOS001 ▼         | ults |  |  |  |  |
|   |  |                   |      |  |  |  |  |
|   |  |                   |      |  |  |  |  |
|   |  |                   |      |  |  |  |  |
| - |  |                   |      |  |  |  |  |

- 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

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| SRM GAP Assessment Survey Management                        |  |  |  |  |
|---|--|--|--|--|
| Results retrieved Successfully                              |  |  |  |  |
| * Required fields   |  |  |  |  |
| Select an Option: O Create Survey 💿 Retrieve Survey Results |  |  |  |  |
| Select a Supplier *   |  |  |  |  |
| Select A Supplier   |  |  |  |  |
|   |  |  |  |  |
|   |  |  |  |  |
|   |  |  |  |  |



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| SRM GAP Assessment Results   |   |  |          |         |       |  |  |  |
|--|---|--|----------|---------|-------|--|--|--|
| New   Actions   Settings   |   |  |          |         |       |  |  |  |
| Edit   | Question  | Strongly Disagree                            | Disagree | Neutral | Agree |  |  |  |
| ⊞ Surve  | y:Nancy Test -  | upplier Nancy - LC - NancyID - 1/25/2011 (2) |          |         |       |  |  |  |
| ⊟ <u>Sy</u> frye   | y : Rejina - Rejin  | - Woodstock - SUPP0889 - 2/11/2011 (4)       |          |         |       |  |  |  |
| - V  | Test2   | 0  | 0        | 1       | 0     |  |  |  |
|  | Test  | 0  | 0        | 0       | 1     |  |  |  |
|  | Test2   | 0  | 0        | 1       | 0     |  |  |  |
|  | Test  | 0  | 0        | 0       | 1     |  |  |  |
| B Survey : test - Test Supplier1 - Test Location1 - USPRSU0001 - 1/25/2011 (2) |   |  |          |         |       |  |  |  |
| ⊞ Surve  | 🗄 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.

| Supplier Co          | llaboration              |                           |            | This Site: Sup      | plier Collaboration 💌 |
|----------------------|--------------------------|---------------------------|------------|---------------------|-----------------------|
| GPO PROCUREMENT HOME | SUPPLIER MANAGEMENT      | THIRD PARTY MANUFACTURING | PURCHASING | QUALITY ASSURANCE 🔻 | EXTERNAL SITES 🗢      |
| GPO Procurement Home | > Supplier Collaboration | n                         |            |                     |                       |

- 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.

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• 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.

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| GAP Assessment Survey Templates: New Item |                            |          |        |  |
|---|----------------------------|----------|--------|--|
|   |                            | ОК       | Cancel |  |
| Attach File   🍄 Spelling                  | 🕼 Attach File   🥰 Spelling |          |        |  |
| Template Name *                           | Hospira                    |          |        |  |
|   |                            | <u> </u> | Cancel |  |

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

| GAP Assessment Survey Templates |  |  |  |  |  |
|---------------------------------|--|--|--|--|--|
| New • Actions • Settings •      |  |  |  |  |  |
| Template Name                   |  |  |  |  |  |
| GAP Assessment Survey           |  |  |  |  |  |
| nancy template                  |  |  |  |  |  |
| Regulated Substances            |  |  |  |  |  |
| Dell Computers                  |  |  |  |  |  |
| ACME                            |  |  |  |  |  |
| Hospira ! NEW                   |  |  |  |  |  |
|                                 |  |  |  |  |  |

## 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.

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• In the Quick Launch area, select SRM GAP Assessment Comments



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

| SRM GAP Assessment Comment |                              |              |   |     |
|----------------------------|------------------------------|--------------|---|-----|
| New -                      | Actions -                    | Settings     | • |     |
|                            | New Item<br>Add a new item f | to Dis list. |   | GAF |

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

|                            |  | ОК                                     | Cancel             |
|----------------------------|--|--|--------------------|
| 🖉 Attach File   🍄 Spelling |  | * indicates                            | s a required field |
| Survey *                   |  |  |                    |
| Question *                 | [  |  |                    |
| Answers - Abbott           | Ă È È À I O CI III Br - Br -<br>A AI B Z U I E E E I E E | ⅲ ⅲ   🎭 🛛<br>芹 ╪   <u>▲</u> 🆄          |                    |
| Answers - Supplier         | Ă ª C. A,I ♥ ♥ III B ▪ P ▪<br>A AIB Z U IN N NIN HE IN I | 1999 1999 1999 1999 1999 1999 1999 199 |                    |

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

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Supplier Collaboration SCN Workflow

## 5.5. SCN Workflow



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TPM Collaboration Exception Report Without Attachment

#### 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.



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TPM Collaboration Exception Report Without Attachment

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

| Exc   | eption Report                            |             |               |                      |                                |                         |  |
|-------|--|-------------|---------------|----------------------|--------------------------------|-------------------------|--|
| New   | <ul> <li>Actions - Settings -</li> </ul> |             |               |                      |                                |                         |  |
|       | New Item                                 | High Impact | Date of Event | Date of Notification | Date 1st Draft Rec'd by TPM QA | Date Approved by TPM QA |  |
| Add a | Add a new item to this list.             | No          | 1/24/2011     | 1/24/2011            | 1/24/2011                      |                         |  |
|       | - test                                   |             |               |                      |                                |                         |  |

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TPM Collaboration Exception Report Without Attachment

| Attach File   Spelling                                 | * indicates a require                   | d field |
|--|---|---------|
| TPM Tracking Number *                                  | 1                                       |         |
| High Impact *  | No                                      |         |
| Date of Event *  | 1/27/2011                               |         |
| Date of Notification *                                 | 1/27/2011                               |         |
| Date 1st Draft Rec'd by TPM QA                         | 1/27/2011                               |         |
| Date Approved by TPM QA                                |   |         |
| CAPA Identified  | A A1 B Z U   手 吾 君   扫 扫 諄 諱   A ③ M 11 |         |
|  |   | *       |
| CAPA Due Date (Critical Items Only)                    |   |         |
| CAPA Completion Date (Critical Items Only)             |   |         |
| Effectivity Check Due Date (Critical Items Only)       |   |         |
| Effectivty Check Completion Date (Critical Items Only) |   |         |
| Comments   |   | 4       |
| Status *   | Submitted                               |         |
| TPMID  | LACTPM041                               |         |
| Lot Numbers  | 1                                       | *       |
| Short Description                                      | test email                              | <b></b> |
| Planned  | No 🔽                                    |         |
| Date of Event Recognition                              | 1/27/2011                               |         |
| List Number  | 4505                                    |         |
| ncident Type   | AQL Failure                             |         |
| FPM Name   | Hospira - Montreal                      | -       |
| FPM Location   | Town of Mount Royal, Canada             | -       |
| TPM Region   | LAC                                     | -       |

Formatted: Bulleted + Level: 1 + Aligned at: 72 pt + Tab after: 90 pt + Indent at: 90 pt

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TPM Collaboration Exception Report Without Attachment

- 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)
  - o Status

| Status * | Initiated                                    |
|----------|--|
|          | Initiated<br>Submitted                       |
|          | Sent Back for Review<br>Approved<br>Rejected |

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

|   | Workflow 2007         |
|---|-----------------------|
|   | Workflow Notification |
| Short description:<br>Issue 74 Test   |                       |
| Notification only-Draft Report will be submitted later. Click link to view event details: |                       |
| http://ww00130d: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         |
| -<br>First Draft of Exception Report 1 from Hospira - Montreal, LAC is now ready for your review.   | Workflow Notification |
| Short description:<br>test email.   |                       |
| To complete the task, please follow these steps:<br>1. Click link below to review report:   |                       |
| Exception <u>Report : LACTPM041</u><br>2. After report is reviewed, click <u>here</u> to take action (Approve, delegate, provide feedback). |                       |
| Note: You may also click <u>here</u> to view the workflow status.   |                       |

• The TPM can do one of three things:

| Global | Pharmaceutical | Operations |
|--------|----------------|------------|
|--------|----------------|------------|

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TPM Collaboration Exception Report With Attachment

- 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

|  |       | ОК          | Cancel           |
|--|-------|-------------|------------------|
| 🖉 Attach File   🗙 Delete Item   🍄 Spelling |       | * indicates | a required field |
| TPM Tracking Number *                      | 1     |             |                  |
| High Impact *                              | No. T |             |                  |

• Browse to the location of the required document.

| Exception Report: Exception Report : LACTPM041 Use this page to add attachments to an item. |  |    |        |
|---|--|----|--------|
| Name  |  |    | Browse |
|   |  | ОК | Cancel |

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#### • 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         |
| First Draft of Exception Report 1 from Hospira - Montreal, LAC is now ready for your review.   | Workflow Notification |
| Short description:<br>test email.  |                       |
| To complete the task, please follow these steps:<br>1. Click link below to review report:  |                       |
| Exception Report : LACTPM041<br>2. After report is reviewed, click <u>here</u> to take action (Approve, delegate, provide feedback). |                       |
| Note: You may also click <u>here</u> to view the workflow status.  |                       |

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

| Global | Pharmaceutical | Operations |
|--------|----------------|------------|
|--------|----------------|------------|

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TPM Collaboration TPM Exception Report Workflow

# 6.3. TPM Exception Report Workflow



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Third Party Manufacturer TPM Exception Report Workflow

#### 7. THIRD PARTY MANUFACTURER

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Quality Assurance TPM Exception Report Workflow

#### 8. QUALITY ASSURANCE

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Quality Assurance TPM Exception Report Workflow

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