



# SUPPLIER PORTAL-EGC Supplier Plus

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*User Manual*

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# 1. Introduction

Congratulations! You have the privilege to access to the Supplier Plus application as you are a strategic supplier. We are delighted to work with you.

Welcome! We've created this manual to make using our application as easy and intuitive as possible. This guide will walk you through every step, so you can achieve the most out of the application.

The Supplier Plus application also known as the Supplier Portal is a comprehensive platform designed to enhance supplier engagement and streamline communication. It allows suppliers to initiate meetings ensuring that all interactions are documented for future reference. Supplier User can easily view upcoming meetings and their statuses, facilitating better planning and coordination.

Additionally, the application enables suppliers to create and manage tasks, providing visibility into task progress and completion status. This all-in-one solution fosters collaboration and improves operational efficiency for suppliers.

## 1.1 Scope

The user manual enables the suppliers to easily access the supplier portal application by covering all its modules. The users are Supplier User.

Admin users enjoy comprehensive access to all modules, enabling them to manage and oversee operations efficiently.

Supplier User can access essential features such as task management and meeting scheduling, ensuring they stay informed and engaged. For those seeking additional access, a simple request can be made to the admin, who retains the discretion to grant or deny privileges. This structured access ensures that sensitive information is protected while still fostering a collaborative environment.

## 1.2 Audience





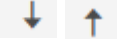


The Audience are the suppliers or the members in the supplier organization who are likely to meet or interact with the EGC Employee (Preferably the EGC Lead Engineer/ EGC Site Manager/ EGC Key account manager/ Inventory Analyst/ Buyer/ AR (Accounts Receivable) working at the End-Customer location).



## 2. Common Functionalities

### 2.1 Document/Application Conventions

Table 1: Document Conventions

Icon	Description
	Note - a brief, informative or cautionary statement included to provide additional context, tips or warning to the user
*	All fields marked with asterisk (*) are mandatory
<b>ABC</b>	All bold words in the document refer to the fields or words from the GUI
	Advanced Filter -allows users to create specific filters enabling them to refine data based on multiple criteria and conditions.
	Export to Excel - the ability to save data or reports from the application into a Microsoft Excel file format, allowing for further analysis, and sharing of the data.
	Tool tip - is a small, contextual pop-up message that appear when a user clicks on the icon providing details of the graph/image improving understandability
	Sort in descending or ascending order
	Filter the rows in a grid
	Search bar to search for specific record

### 2.2 Application Language Options

The EGC Supplier Plus application allows the user to view the site in multiple languages. By default, the app content is displayed in English. The Supplier user can change the language from the options provided on the top right corner of the screen. The options available are:

- **PL**- Polish
- **EN**-English
- **SP**-Spanish
- **DE**-German

Figure 1: Language options



## 2.3 About us


The About Us section provides information regarding our mission, characteristics, and identity. It essentially provides a history outlining the company's goals.

**To view the EGC Supplier Plus about us screen, follow the instructions:**

1. Navigate to the supplier portal: <https://supplierportal.theegc.com/> . The login screen is displayed.
2. Click **About Us** in the bottom of the screen, the About Us screen is displayed.

The screen displays who we are, our purpose and the group of companies in the EWIE group.

Figure 2: About Us





EN

Home
>
About us

## About us


### Who we are


EWIE Group of Companies (EGC) is a minority-owned business, created from the merging of East-West International Engineers (EWIE), Production Services Management Inc. (PSMI), Sourcepro, Gaging Solutions & Services (GS&S), EGC Supply, Azoth, and Cadena. EGC is an international company, that provides a multitude of services to many internationally renowned companies.










### Purpose

All of these companies came together and formed EGC to embrace their shared vision, to provide optimized solutions in inventory management, supply, and cost savings for their customers.





[About us](#)
[Privacy](#)
[Terms & Conditions](#)
[Contact Us](#)

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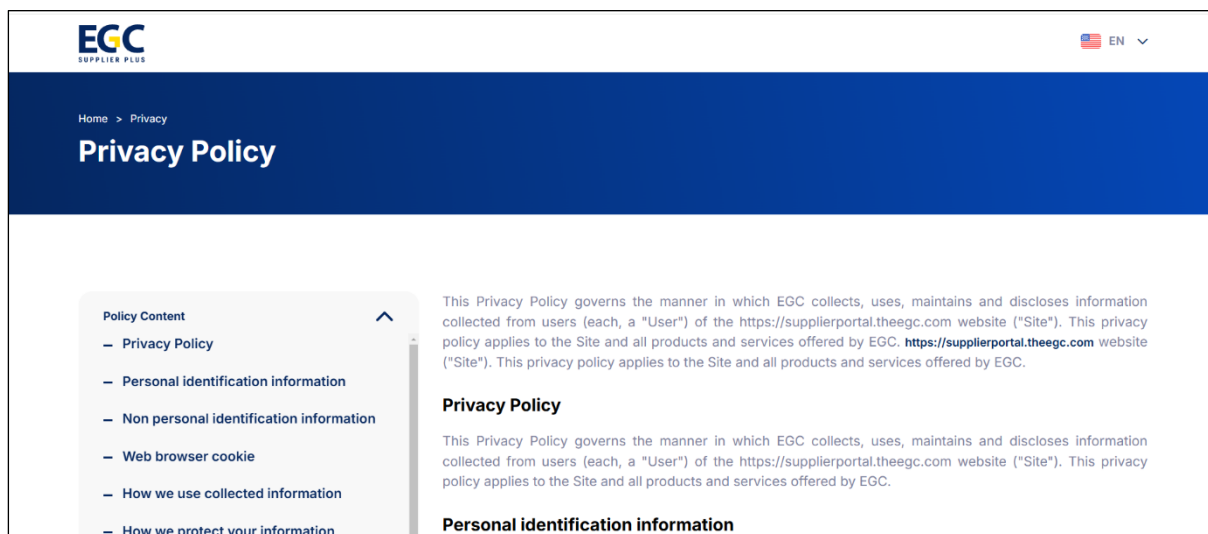
## 2.4 Privacy

Privacy policy is a legal document that outlines the agreement between the organisation and the user regarding data privacy practices. It describes how the app gathers, stores, uses, and shares user data, as well as what personal information is collected and how it will be handled.

**To view the EGC Supplier Plus privacy policy, follow the instructions:**

1. Navigate to the supplier portal: <https://supplierportal.theegc.com/>. The login screen is displayed.
2. Click **Privacy** in the bottom of the screen, the Privacy Policy screen is displayed.

Figure 3: Privacy Policy



3. The **Policy Content** pane on the left enables the user to access specific topics of the policy.

## 2.5 Terms & Conditions

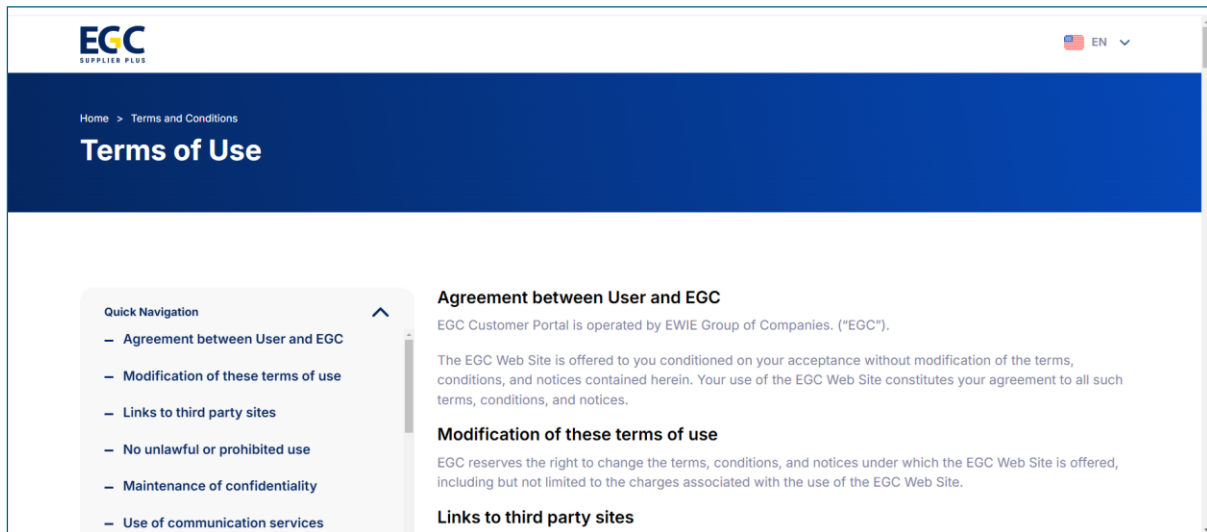
Terms and Conditions are the guidelines that control a user's use of an application. They spell out the rights and obligations of the user and safeguard the company. They consist of user limitations, rules of conduct, liability limitations, and dispute resolution etc.

The terms and conditions are crucial as they guard against legal liabilities for the company, control users' expectations and outline the rights and obligations of the user and the company.

**To view the EGC Supplier Plus terms and conditions, follow the instructions:**

1. Navigate to the supplier portal: <https://supplierportal.theegc.com/>. The login screen is displayed.
2. Click **Terms and Conditions** in the bottom right corner of the screen, the Terms of Use screen is displayed.

Figure 4: Terms of Use



3. The **Quick Navigation** pane on the left enables the user to access specific topics of the terms and conditions.

## 2.6 Contact Us

Our dedicated team is ready to assist you with inquiries, partnerships, and collaborations that can elevate your company. Reach out today to explore how we can work together to achieve your goals.

The names and email addresses of Director of Technology and Strategic Application Analyst and the Contact number are displayed on the screen.

**To contact us, follow the instructions:**

1. Navigate to the supplier portal: <https://supplierportal.theegc.com/>. The login screen is displayed.
2. Click **Contact Us** in the bottom of the screen, the Contact Us screen is displayed.

Figure 5: Contact Us

**EGC**  
SUPPLIER PLUS

Home > Contact Us

## Contact the EWIE Group of Companies (EGC)

**Feel free to reach us**

**Full Name \***

Full Name

**Email Address \***

Email Address

**Select Category \***

Select

**Subject \***

Subject

**Message \***

Your Message Here

**Contact Us**

Our team is happy to answer any questions. Fill out the form, and we will get back to you within 24 hours. Or, you can get into contact with our team via phone or email.

**Subin Babu**  
subin\_babu@theegc.com  
(Director of Technology)

**Steven Hill**  
shill@theegc.com  
(Strategic Application Analyst)

3. In the screen, do the following:
  - **Full Name:** Enter the name of the user
  - **Email Address:** Enter the email address of the user
  - **Select Category:** Select the category/reason for contacting from the drop down list
  - **Subject:** Enter the subject for contacting
  - **Message:** Enter the message
  - **Enter text shown in image**
4. Click **Contact Me** to send an Email to the Admin. An email is sent to the EGC administrator.

### 3. Getting Started

This section enables the supplier to Sign in to the EGC Supplier Plus application. It enables the supplier to register to the application, login to the application or receive a password reset link.

Figure 6: Login Screen

#### 3.1 Sign Up/ Register

The supplier can register to access the application if the supplier is new to EGC Supplier Plus application.

**To register, follow the instructions:**

1. Navigate to the supplier portal: <https://supplierportal.theegc.com/>. The login screen is displayed.
2. Click **Register Here** to register as a new supplier. The registration screen is displayed.

Figure 7: Register Screen

3. On the screen, enter the following details:

- **First Name\***: Enter the supplier's first name
- **Last Name\***: Enter the supplier's last name
- **Email Address\***: Enter the supplier's official Email ID
- **Confirm email\***: Re-enter the Email ID



*The supplier's organisation should be the email's domain. Personal email addresses and domains other than those of the supplier's company are not permitted.*

- **Designation**: Enter the designation/position/role/job title of the user
- **Country Code**: Select the country code of the supplier's phone number from the drop-down
- **Phone Number\***: Enter the phone number of the supplier



*All fields marked with asterisk (\*) are mandatory.  
Country Code is mandatory. An error message is displayed if the country code does not match the phone number.*

Invalid Phone #

4. Enable the checkbox to agree to the terms and conditions of the portal.

5. Click **Create Account** to register to the EGC Supplier Plus portal. The Registration screen displays the information to verify.

Figure 8: Registration

Registration
Cancel
Submit

Please verify the information below and click on submit button to finish the registration process.

**Account Info**

Supplier Group
Admins
Steven Hill, Keith Knelding, Scott Johnson, Thomas Henry, Hector Valencia, Esperanza Montano, John Power, Stephen Bennett, Sergio Isaac, Patrick Baldridge, Brian Flores, Jonathan LeBlanc, Andre Herbertz, KRZYSZTOF MISZCZAK, Nick Falgiatano, asha p, sndp pdns, Sndeeep Kmr, Sdneep Rumak, test tc, Mohamed Shahil

**Personal Details**

First Name \*
test1

Last Name \*
test2

Email Address \*
test1@

Phone Number \*
+1

Designation \*

**Functional Access**

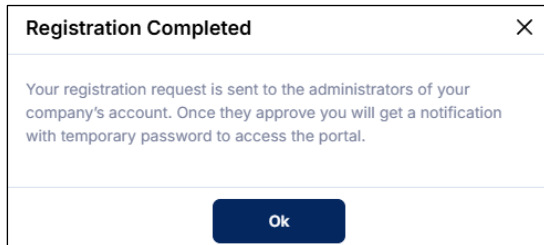
☐ Cost Saving
☒ Task
☒ Meeting
☐ Product Obsolescence
☐ Corporate Announcement

**Description**



6. Verify the information. Enable the modules in **Functional Access** for the user to access in the application.
7. Enter the **Description** pertaining to the user registration.
8. Click **Submit**. A confirmation popup appears.

Figure 9: Registration Completed Popup



9. Click **Ok** to confirm.

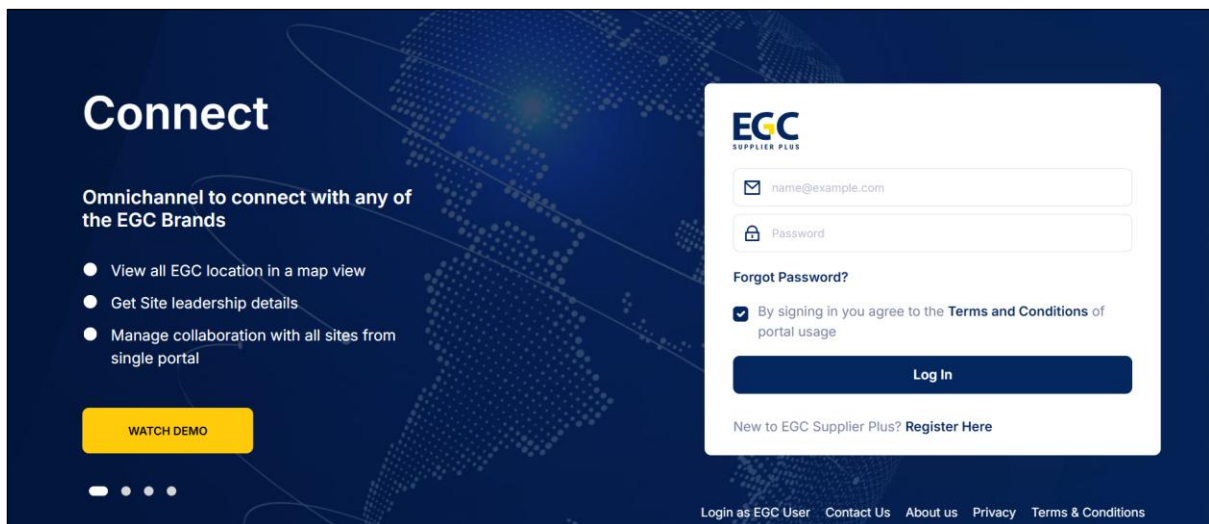
## 3.2 Sign In

The registered supplier can login to the application.

**To login, follow the instructions:**

1. Navigate to the supplier portal: <https://supplierportal.theegc.com/>. The login screen is displayed.

Figure 10: Login Screen



2. Enter the email address and the Password of the registered supplier.



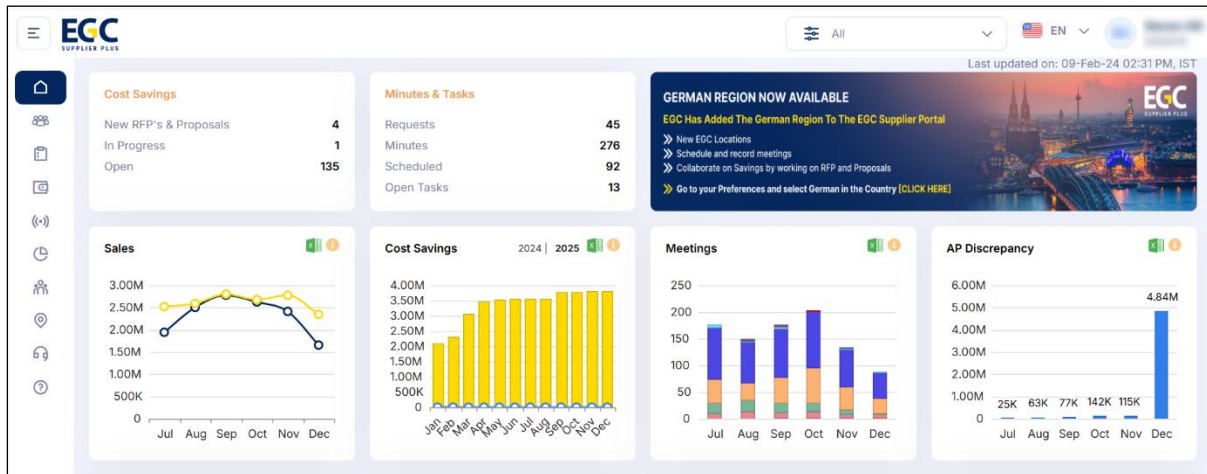
*By default, the **Terms and Conditions** checkbox is enabled. Disabling the checkbox will not allow the user to login.*

3. Click **Login** to Sign in to the EGC Supplier Plus application. The Dashboard screen is displayed.



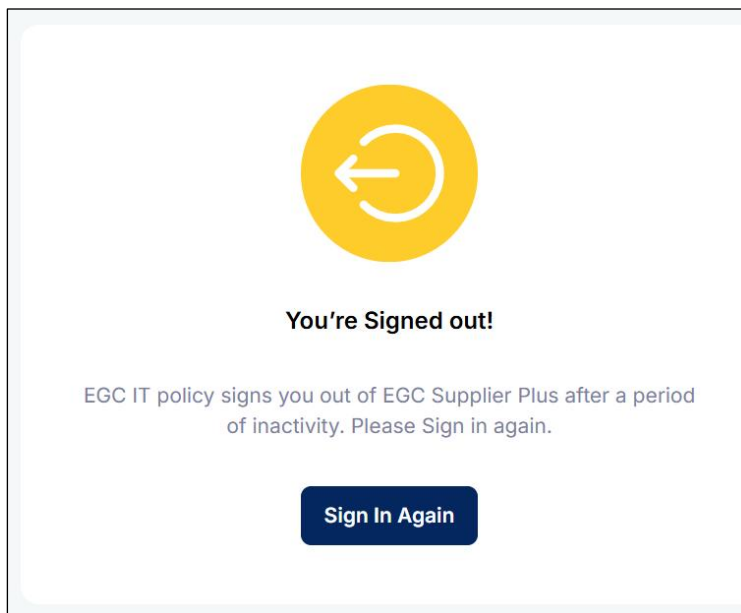
*First time user is redirected to the New User Login screen (Refer New user login).*

Figure 11: Dashboard



The application automatically logs off the user if the user has not performed any activity in the application for a period of 20 minutes (if the application is idle for a 20 minutes). To continue working with the application the user should sign in.

Figure 12: Automatic Log off



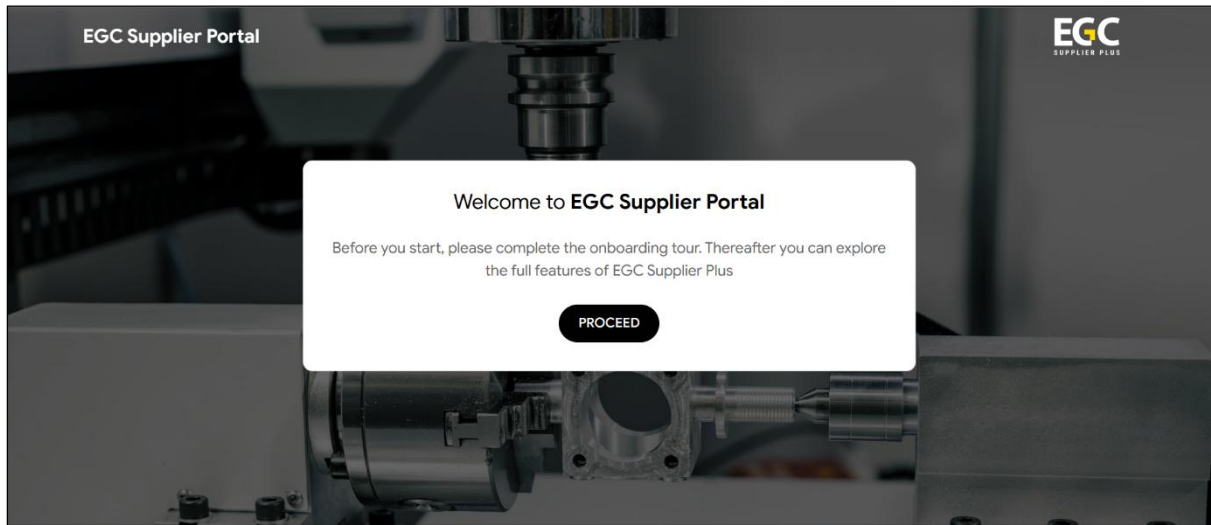
### 3.3 New user login

The new user should login with the temporary password and complete the onboarding process before exploring the supplier portal application.

**To complete the onboarding process, follow the instructions:**

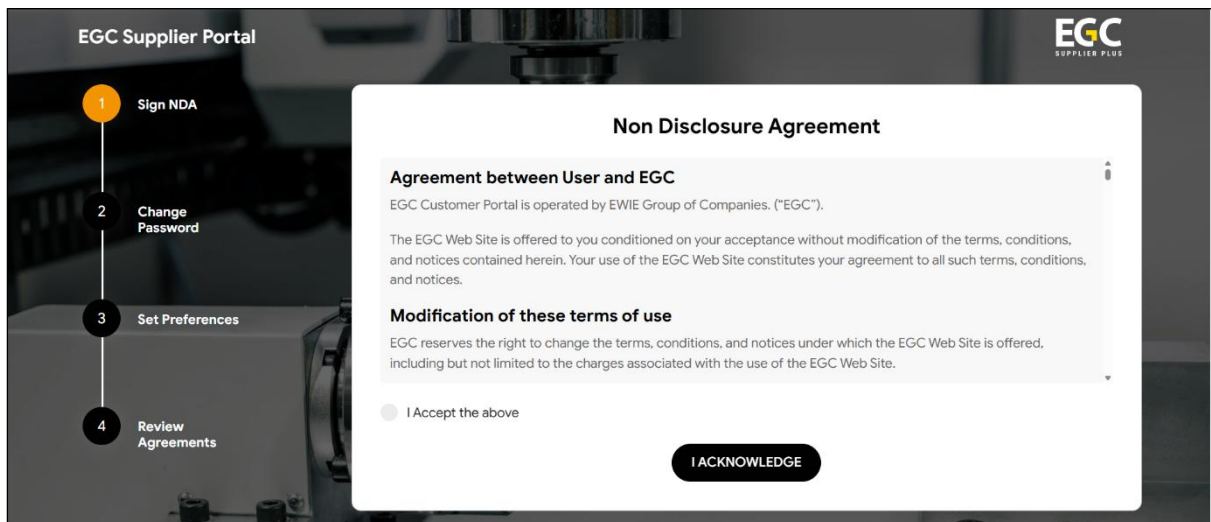
1. Login to the application with the temporary password. The onboarding process landing page is displayed.

Figure 13: Onboarding Welcome screen



2. Click **PROCEED** to start the onboarding process.

Figure 14: Onboarding-Sign NDA



3. Enable the **I Accept the above** checkbox and click **I ACKNOWLEDGE**.

Figure 15: Onboarding-Change Password

EGC Supplier Portal

**Change your password**

It is mandatory to change your password when you login first time

Your password must contains a Capital case letters, lower case letters, numbers & symbols

Existing Password  Choose New Password  Confirm New Password

**CHANGE PASSWORD**

Password Strength:

4. Enter the **Existing Password**, **Choose New Password** and **Confirm New Password**.



*An error message is displayed if the Choose New Password and Confirm New Password does not match. The strength of the password is displayed*

5. Click **Change Password**, the **Password changed!** message is displayed.

Figure 16: Onboarding-Password Changed

EGC Supplier Portal

**Password changed!**

**NEXT**

6. Click **Next**, the **Set Preferences** popup is displayed.

Figure 17: Onboarding-Set Preferences

7. Select and enable the country/region to view the plants in that region.
8. Select/enable the sites to view data pertaining to those plants.
9. Click **Next**, the Confidentiality documents are displayed.

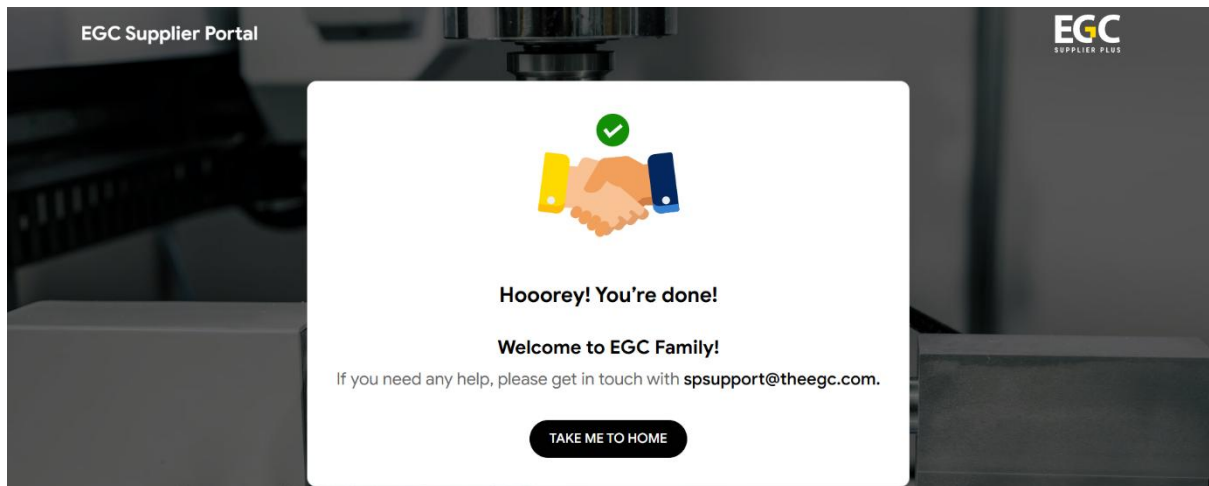
Figure 18: Onboarding-Confidentiality

10. Enable **I Accept the above** and click **Next**.



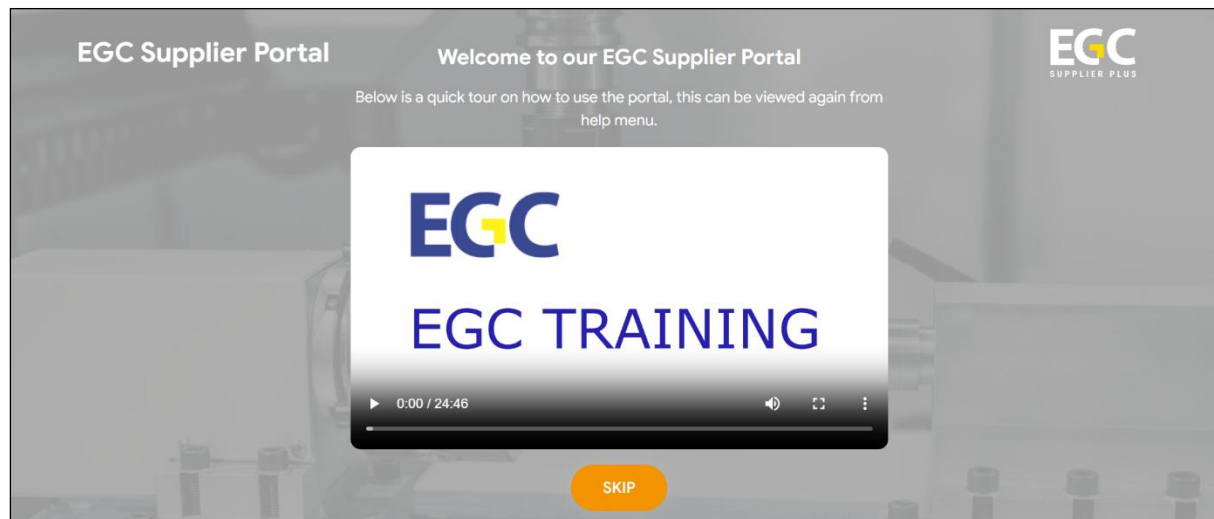
*The number of confidential documents to read and agree to depends on the End-Customer.*

Figure 19: Onboarding complete



11. Click **TAKE ME TO HOME** to take the training/view training videos.

Figure 20: EGC Training



Click **SKIP** to skip the training and go to the Dashboard or Landing screen.

## 3.4 My Profile

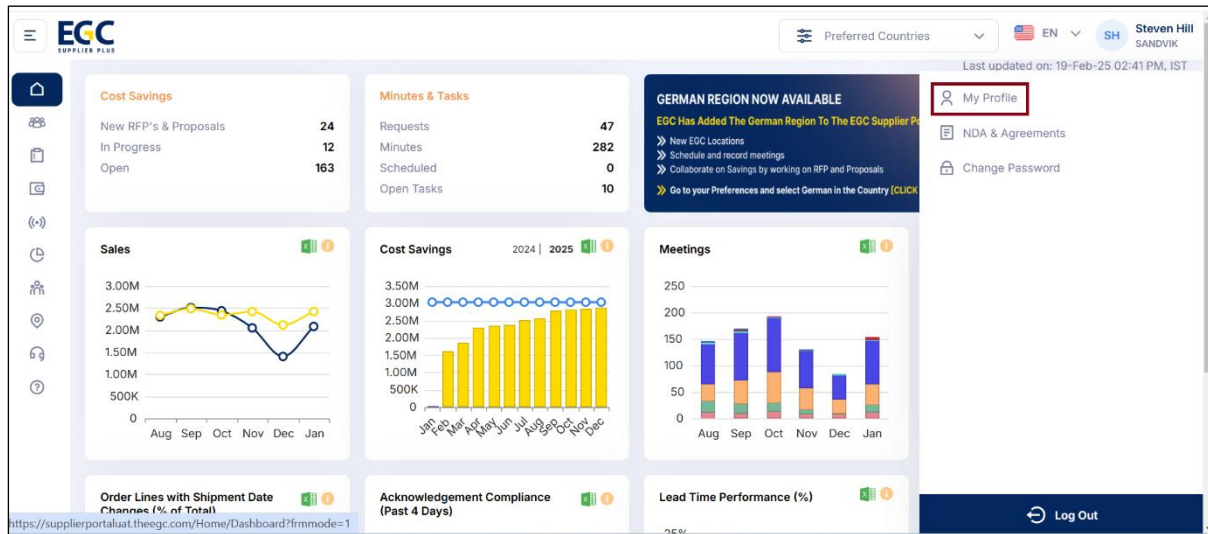
The My Profile section displays the user details and their preferences. These details are added when the user is created. The details can be edited when needed.

**To edit the user profile, follow the instructions:**

1. Click the username on the top right corner of the screen/ application. The options are displayed.

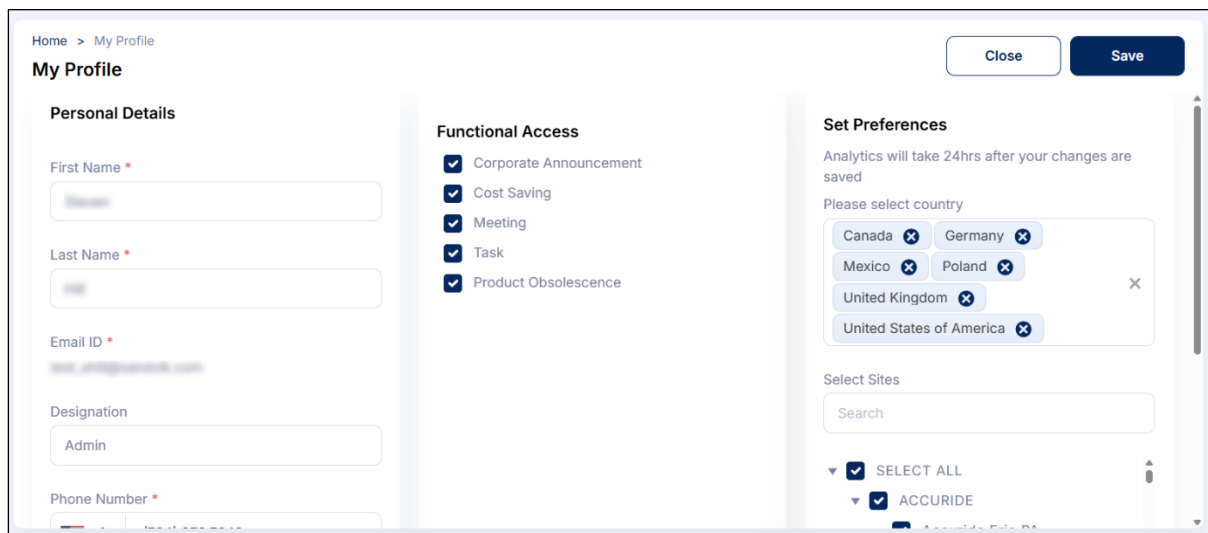


Figure 21: My Profile - Option



2. Click **My Profile**. The profile details screen is displayed.

Figure 22: My Profile



The 'My Profile' form is divided into three main sections:

- Personal Details:**
  - First Name \*
  - Last Name \*
  - Email ID \*
  - Designation
  - Phone Number \*
- Functional Access:**
  - ☒ Corporate Announcement
  - ☒ Cost Saving
  - ☒ Meeting
  - ☒ Task
  - ☒ Product Obsolescence
- Set Preferences:**
  - Analytics will take 24hrs after your changes are saved
  - Please select country: Canada, Germany, Mexico, Poland, United Kingdom, United States of America
  - Select Sites: Search, SELECT ALL, ACCURIDE

Buttons: Close, Save

3. In the screen, do the following:

- **Personal Details:** Edit the personal details.



*The Email ID cannot be updated.*

- **Functional Access**



*Functional Access cannot be edited by normal users. Admin users have the rights to edit them..*

- **Set Preferences**

- **Please select country**
- **Select Sites**

4. Click **Save** to save the changes in the profile screen.

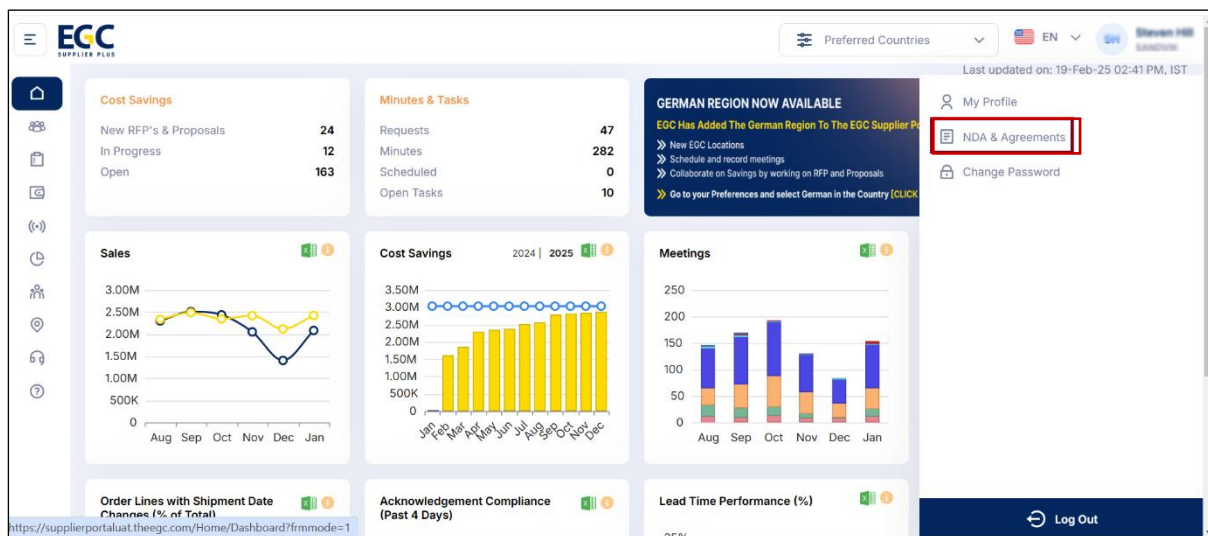
## 3.5 NDA and Agreements

The non-disclosure agreements and other agreements between the supplier and the EGC Group are displayed in the NDA and Agreements section.

**To view the NDA and agreements, follow the instructions:**

1. Click the username on the top right corner of the screen/ application. The options are displayed.

Figure 23: Change Password - option



2. Click **NDA & Agreements**, the screen displays the agreements.

## 3.6 Change Password

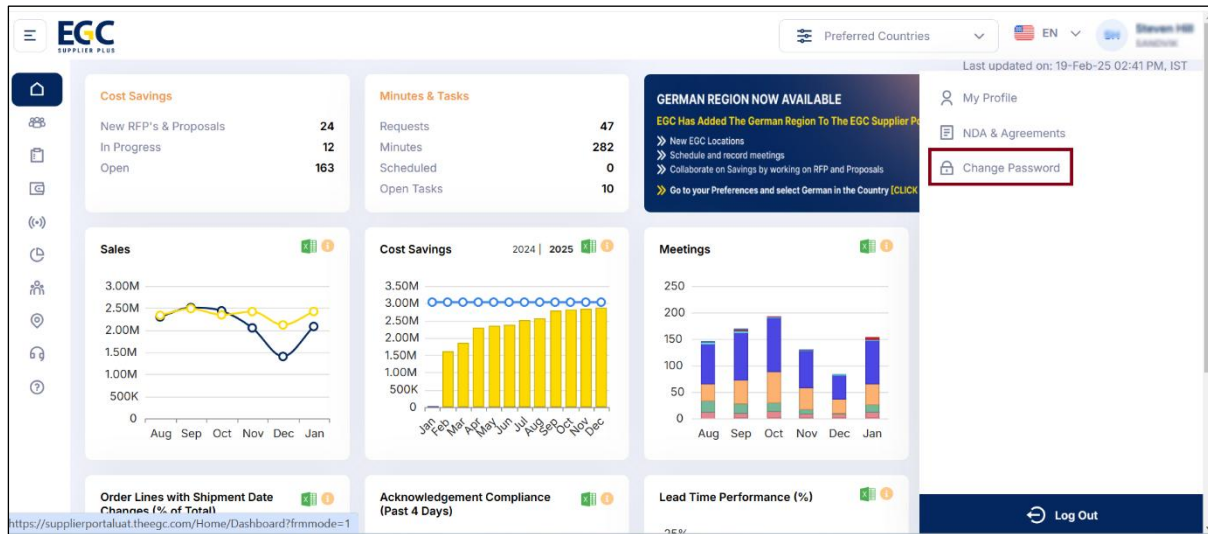
The user can change the application password after logging into the application.

**To change the application password, do the following:**

3. Click the username on the top right corner of the screen/ application. The options are displayed.

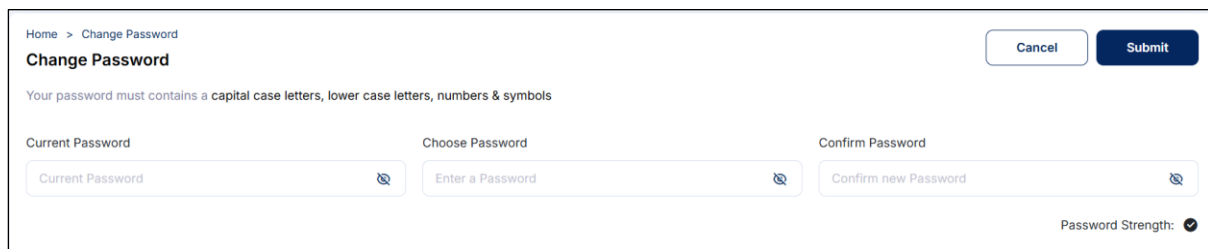


Figure 24: Change Password - option



- Click **Change Password**, the change password screen is displayed.

Figure 25: Change Password



- Enter the **Current Password**, **Choose Password** and **Confirm Password**.



**Choose Password and Confirm Password must be same.** As the user inputs the password, the strength of the password is shown to determine the level of protection. Password must contains a capital case letters, lower case letters, numbers & symbols  
New Password cannot be same as current password  
An error message is displayed if the current password is incorrect

- Click **Submit** to change the password. A success message is displayed, and the User Management screen is displayed.

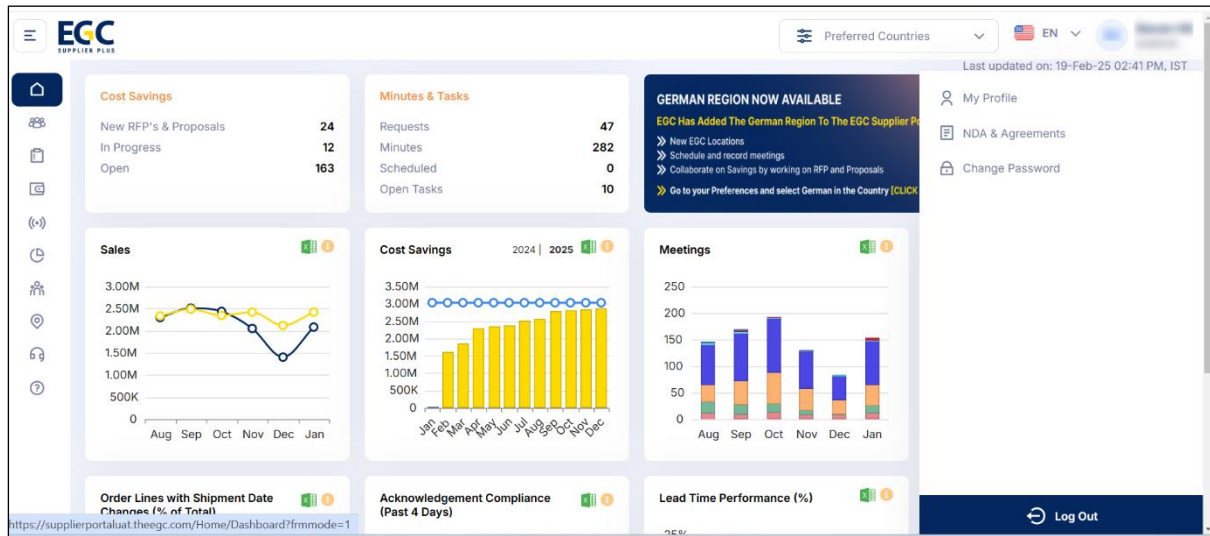
## 3.7 Sign Out

The Supplier User can sign out of the application at any time.

**To sign out of the application, follow the instructions:**

- Click the username on the top right corner of the screen/application. The various settings/options for the user are displayed.

Figure 26: Logout option



1. Click **Log Out** displayed at the bottom to sign out of the application.

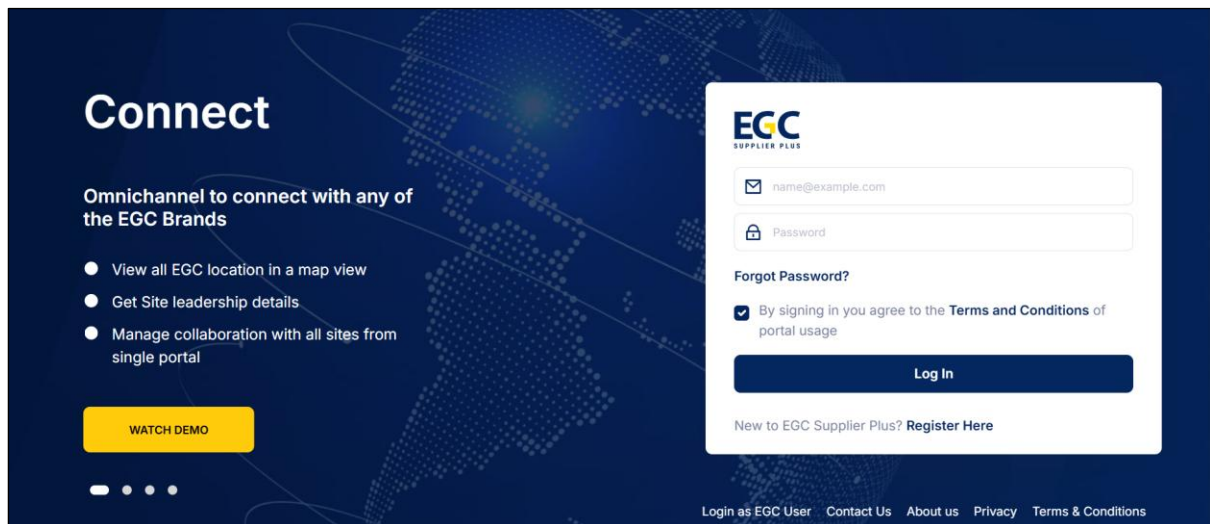
## 3.8 Forgot Password

The Forgot Password screen is integrated for hassle-free account recovery, promoting end-user satisfaction.

To reset password, follow the instructions:

1. Navigate to the supplier portal: <https://supplierportal.theegc.com/>. The login screen is displayed.

Figure 27: Login Screen



2. Click **Forgot Password** to reset password.

Figure 28: Reser Password

**Cost Savings**

Actively participate in cost saving and have better control over your KPIs.

- Work with EGC in identifying opportunities
- Document the savings and track your KPIs
- Engage with site and EGC engineers to conduct required test

[WATCH DEMO](#)

**EGC**  
SUPPLIER PLUS

**Forgot Password**

Enter your email to get a password reset link

[Submit](#)

[Back to Login](#)

[Login as EGC User](#) [Contact Us](#) [About us](#) [Privacy](#) [Terms & Conditions](#)

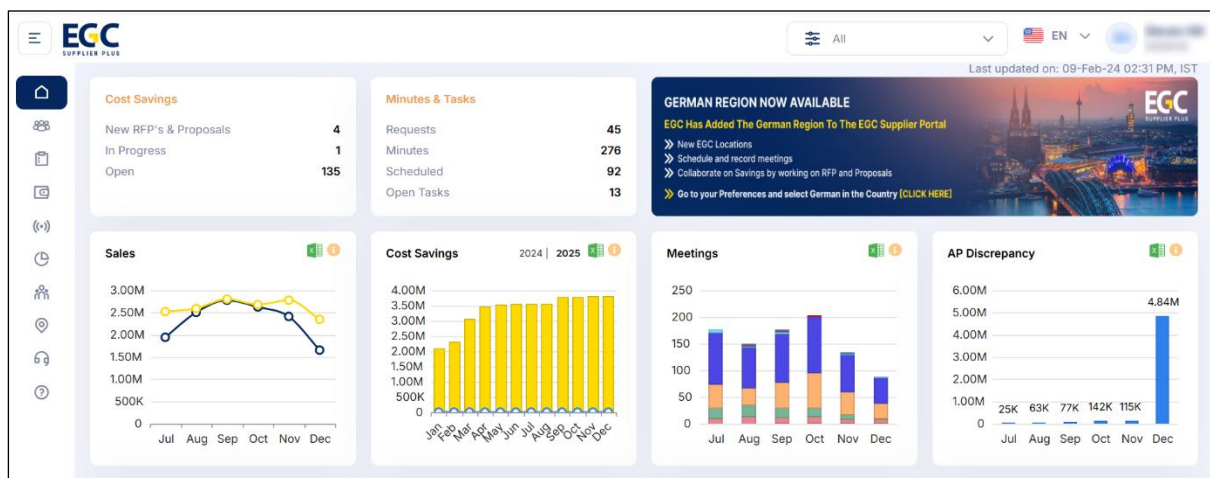
3. Enter the registered email.
4. Click **Submit**. An email with the password reset link is mailed to the registered email address.

## 4. Dashboard

The EGC supplier portal's dashboard offers a multifaceted view of critical business data, empowering users to enhance their decision-making processes. This intuitive interface presents a wealth of information, enabling suppliers to analyse growth trends, identify improvement areas, and make informed financial decisions to achieve stability.

With features that facilitate the management of accounts payable, shipping efficiency, and End User expectations, the dashboard provides valuable insights into supplier responsiveness and order management. Its user-friendly layout ensures accessibility, allowing suppliers to optimize their business processes and implement targeted improvements in logistics and quality control.

Figure 29: Dashboard



This advanced dashboard offers a comprehensive overview of various data types, enabling users to analyse and interpret information effectively. Each graph is equipped with a tooltip feature, providing essential insights for enhanced understanding. Additionally, users can conveniently download the data in an Excel file, allowing for detailed examination and further analysis.

This comprehensive dashboard provides a multifaceted view of critical data, enabling users to efficiently track and manage various aspects of their operations. The Cost Savings section highlights key metrics such as New RFPs & proposals, In Progress items, and Open tests, facilitating informed decision-making. Additionally, the Minutes and Tasks segment offers insights into the number of requests, minutes logged, scheduled meetings, and open tasks, ensuring that users can effectively monitor their productivity and workflow.

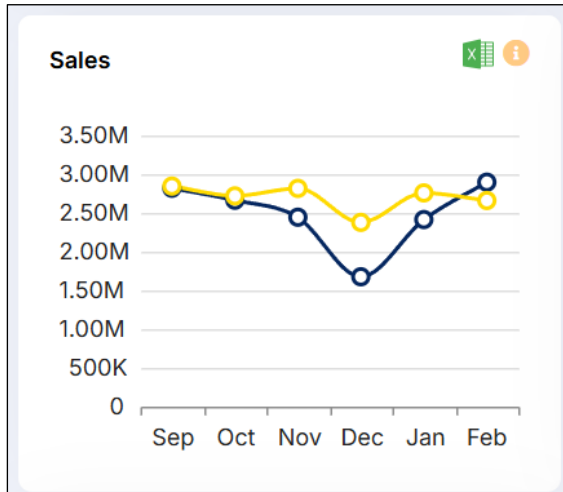
Figure 30: Dashboard

Cost Savings		Minutes & Tasks	
New RFP's & Proposals	4	Requests	45
In Progress	1	Minutes	276
Open	135	Scheduled	92
		Open Tasks	13

## 4.1 Sales

The sales line graph shows the overview of sales performance by displaying data for the past six months, allowing users to compare current sales figures with those from the previous year. It provides insights into trends and patterns, facilitating informed decision-making for future strategies. The clear presentation of current and previous period data enhances the ability to analyse growth and identify areas for improvement.

Figure 31: Sales line graph



The graph's colour indications are as follows:

Table 2: Sales graph colour indication

Colour	Description
<span style="color: yellow;">—</span>	Current year sales data
<span style="color: blue;">—</span>	Previous year sales data

## 4.2 Cost Savings

This bar chart effectively illustrates the cost savings achieved for an idea, providing a clear visual representation of financial performance. It displays the cumulative value of tests that have been implemented (savings) and those in the pipeline against the established annual target, which is based on a percentage of the previous year's sales. The bars represent the actual realized savings that have been approved, while the varying stages of open tests in the pipeline are also highlighted. Additionally, the annual target is depicted as a line graph, offering a comprehensive overview of the project's financial trajectory and forecasting potential.

Figure 32: Cost savings bar line graph

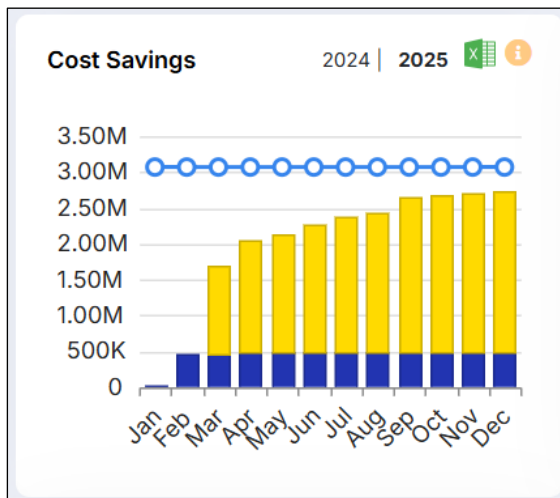


Table 3: Cost Savings graph colour indication

Colour	Description
<span style="color: blue;">—</span>	Annual target (Based on % of previous year sale)
<span style="color: darkblue;">—</span>	Actual realized savings which have been signed off
<span style="color: yellow;">—</span>	Value of open tests in the pipeline in different stages

### 4.3 Meetings

This bar chart visually represents the number of meetings conducted with the EGC team over the past 6 months, categorized by type. It provides a comprehensive overview of various meeting types, including Contractual Discussion, Incident Review, Miscellaneous, New Opportunity, Project Related Visit, Support Visit, Tool Delivery, Training, and Usage Review Meeting, allowing for an insightful analysis of engagement and focus areas within the last six months.

Figure 33: Meetings graph

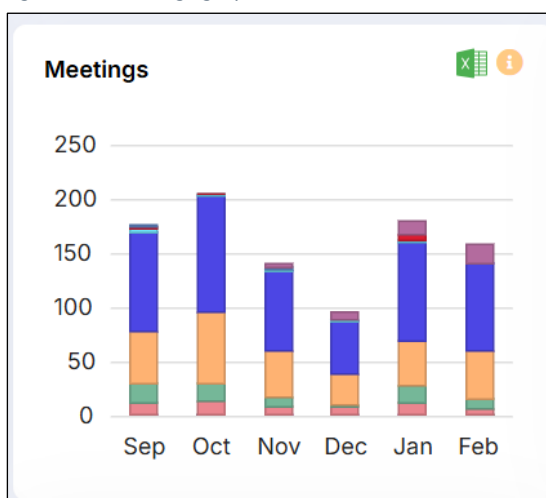











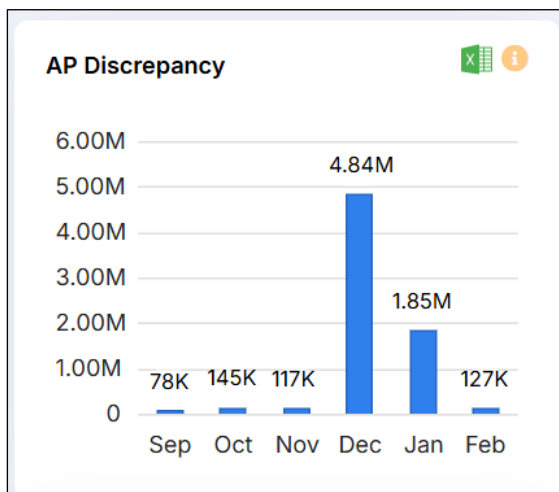
Table 4: Meetings graph colour indication

Colour	Description
	Contractual Discussion
	Incident Review
	Miscellaneous
	New Opportunity
	Project Related Visit
	Support Visit
	Tool Delivery
	Training
	Usage Review Meeting

## 4.4 AP Discrepancy

The AP Dispersion Graph provides a comprehensive visual representation of invoice discrepancies over a rolling six-month period. This graph highlights the total value of disputed invoices each month, allowing users to identify trends and patterns in discrepancies. Disputes typically arise from mismatches between Purchase Order (PO), Invoice and Receipt, or when products are not received within ten days of invoice receipt, making this tool essential for effective accounts payable management.

Figure 34: AP Discrepancy graph

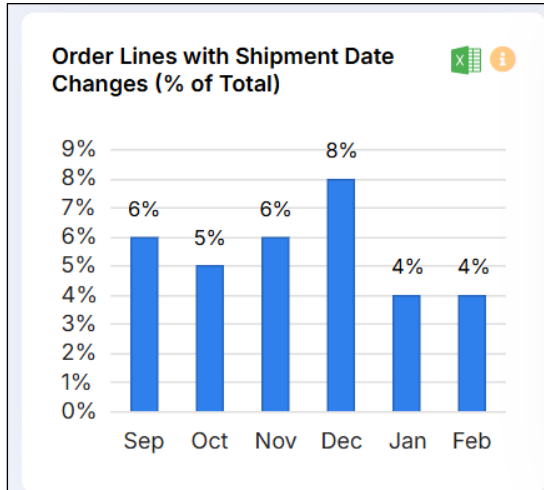


## 4.5 Order Lines with Shipment Date Changes (% of Total)

This bar chart visually represents the percentage of order lines with changes in shipment dates. The chart displays the acknowledge date changed from the purchase order date for

the last six months, providing a clear overview of the impact of shipment date adjustments on overall order fulfilment. This data is essential for understanding shipping efficiency and managing End User expectations.

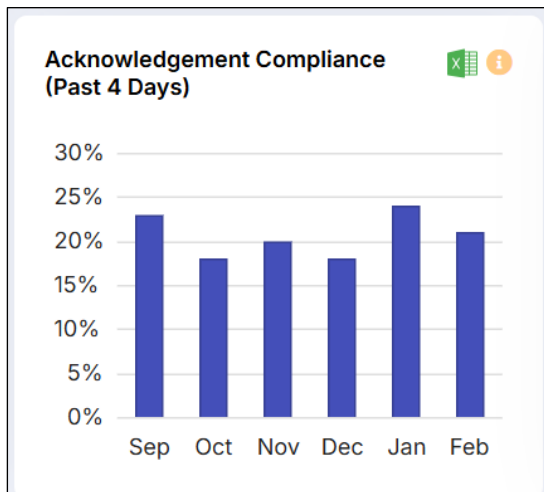
Figure 35: Order lines with change in shipment date



## 4.6 Acknowledgement Compliance

The graph highlights the percentage of PO acknowledgements that remain unacknowledged by suppliers within 3 business days, calculated against all POs issued in the corresponding month. The data spans the last six rolling months, offering valuable insights into supplier responsiveness and order management efficiency.

Figure 36: Acknowledgement Compliance graph



## 4.7 Lead Time Performance

The lead time performance bar chart visually represents the lead time performance of a company over a rolling six-month period, focusing on fulfilment accuracy. It highlights two key performance indicators (KPIs): Missed and Delayed percentages. The Missed percentage indicates the proportion of orders shipped after the System Estimated Time of Arrival (ETA),



while the Delayed percentage reflects orders shipped after the Supplier ETA provided in the acknowledgment. Both metrics are expressed as a percentage of the total lines received each month, providing a clear overview of the company's shipping efficiency and areas for improvement.

Figure 37: Lead time performance graph

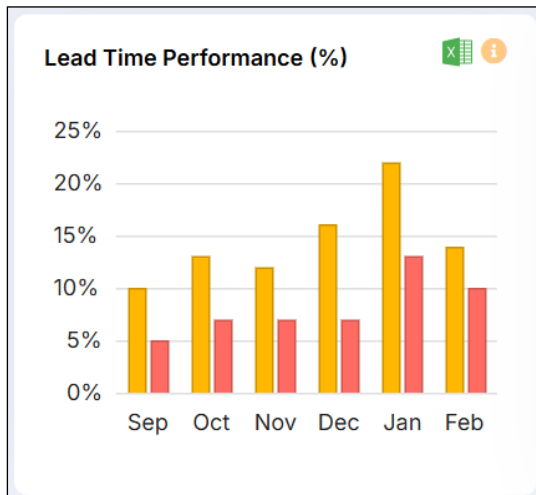




Table 5: Lead Time Performance graph colour indication

Colour	Description
	Delayed %
	Missed %

## 4.8 Non-Conformance by type

The Non-conformance bar chart visually represents the number of non-conformances registered against received shipments, categorized by type. It effectively highlights various issues, including Material Issues, Shipment Issues, Delayed Shipments, Incorrect Paperwork, Transactional Issues, and Others. Each category is distinctly marked, allowing for quick identification of the most prevalent non-conformances, such as incorrect address deliveries or product damages, thereby facilitating targeted improvements in logistics and quality control processes.

Figure 38: Non-conformance by type graph

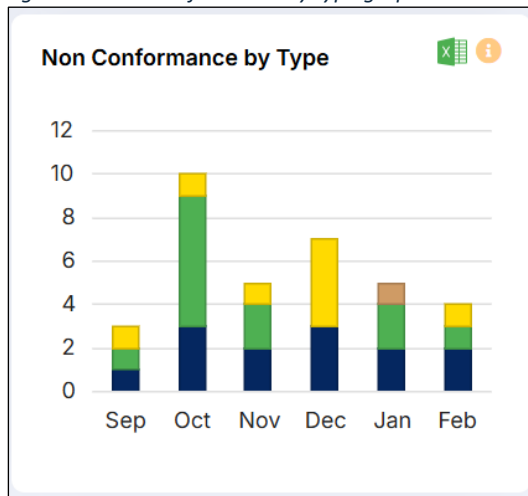








Table 6: Non-Conformance by Type graph colour indication

Colour	Description
	Material Issue
	Shipment Issue
	Delayed Shipment
	Incorrect Paperwork
	Transactional Issue
	Others

## 5. Meetings

Meetings give the supplier a chance to interact with the EGC users to promote communication, resolve issues, and guarantee agreement on quality, delivery, and expectations. The goal is to preserve a positive working relationship and possibly boost sales; this can involve discussing new products, price adjustments, impending changes, or any problems that may arise with existing orders.

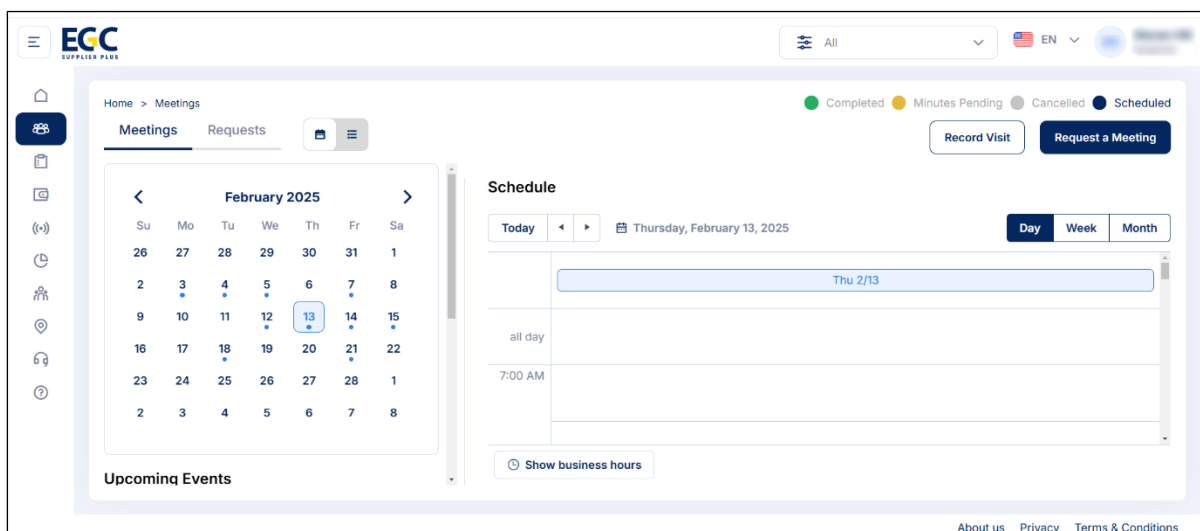
The supplier can request a meeting. The request can be converted into a meeting only when the EGC user accepts the request.

The meetings can be viewed in Calendar view (Refer [Meetings](#)) and list view (Refer [Meeting List](#)).

### 5.1 Meetings (Calendar view)

The meetings screen displays the calendar, the schedule and the upcoming events.

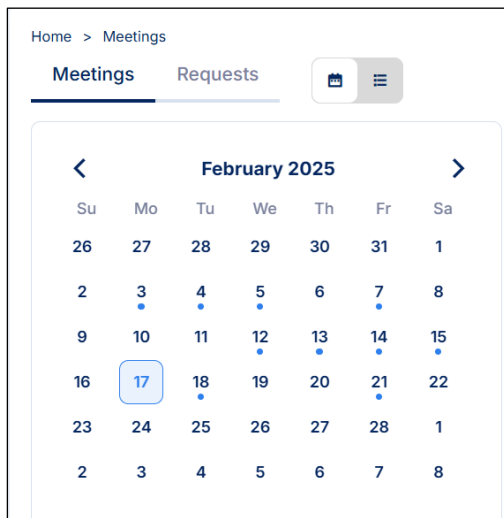
Figure 39: Meetings



#### 5.1.1 Calendar

The calendar part of the meetings screen displays the current month (by default). The calendar highlights the meetings that were scheduled in this month with a dot below the day number.

Figure 40: Calendar



On clicking a specific day, the scheduled events for the selected day are displayed in Schedule pane on the right.

### 5.1.2 Upcoming Events

The upcoming events in the meeting screen displays the meetings that were requested by the supplier and approved by the EGC user.

<need to capture image>

### 5.1.3 Schedule

The schedule pane by default displays the current day and the scheduled meetings for the current day.

The schedule pane's view can be customised in the following ways:

- **Day:** By default, the day view is displayed. Click **Day** to display the current day and the scheduled meeting for today.

By default, all day is shown. Click **Show Business Hours/Show Full Day** to display only working hours or the whole day.

Figure 41: Day Schedule

### Schedule

Today
<
>

Monday, February 17, 2025

Day
Week
Month

	Mon 2/17
all day	
7:00 AM	

Show business hours

- **Week:** Click **Week** to display the current week and the scheduled meetings for the current week.

Figure 42: Weekly Schedule

### Schedule

Today
<
>

Sunday, February 16, 2025 - Saturday, February 22, 2025

Day
Week
Month

	Sun 2/16	Mon 2/17	Tue 2/18	Wed 2/19	Thu 2/20	Fri 2/21	Sat 2/22
all day							
8:00 AM							

- **Month:** Click **Month** to display the month and the scheduled meetings for the month.

Figure 43: Monthly Schedule

Schedule						
Today		February, 2025		Day	Week	Month
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30	31	01
02	03 Opportuni... ●	04 Test Meet... ● Monthly ... ●	05 Test Meet... ● Monthly R... ●	06	07 Monthly ... ●	08

Click specific meeting link in the Schedule pane to open the meeting details.

Figure 44: Meeting Details

Home > Meeting > Meeting List > Monthly Meeting

Close
Update Details

Monthly Meeting
Meeting Info Attachments (0) Task (0)

General Information

Customer Plant
Date & Time
21-Feb-25 02:00 PM - 03:00 PM (IST)
Occurs every Month on The Third Friday starting 2024-12-20 until 2026-12-20
Contact
Virtual In-Person
Primary Contact Name
Meeting Link
https://teams.microsoft.com/l/meetup-join/19%3am
Meeting Type
Monthly Review

Agenda
Add More
1.
2.
3.
4.
5.
View Agenda History

The meeting details are displayed as shown. The meeting details can be updated based on the type of meeting. Refer Meeting List (list view).

### Next/Previous

The next and previous symbols in the schedule pane enable to view the next day or week or month based on the view in the schedule pane.

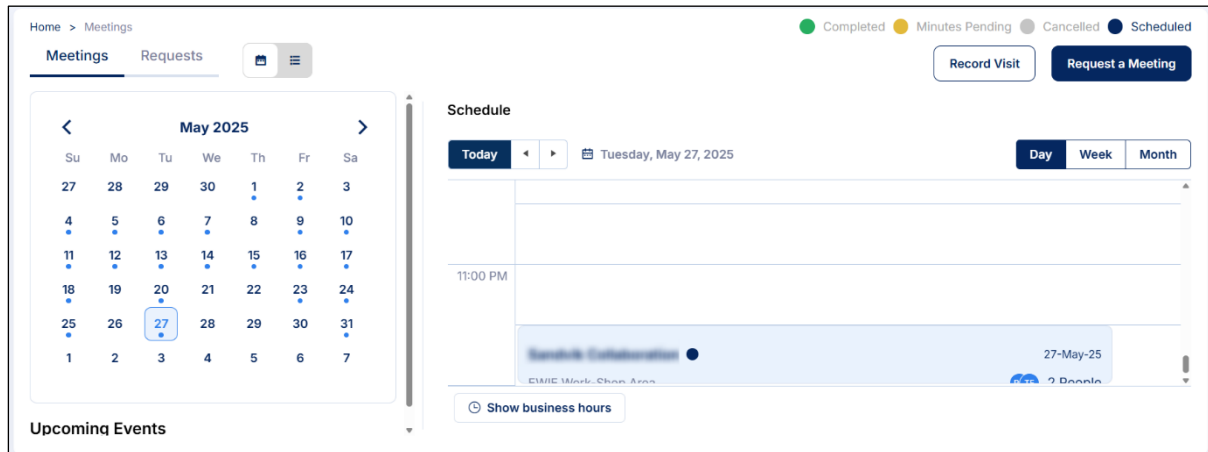
Figure 45: Schedule next/previous

Schedule

Today
Monday, February 17, 2025

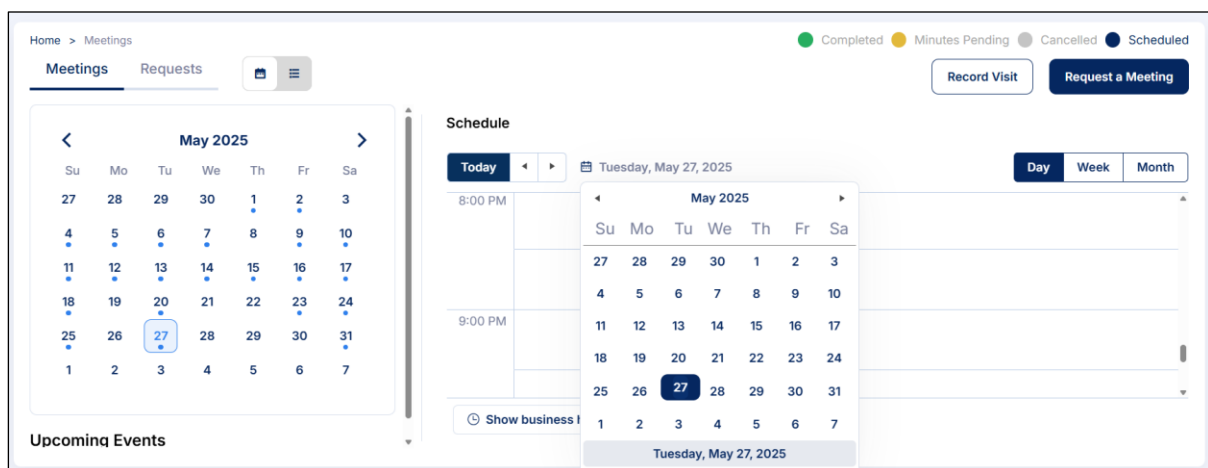
Click **Today** to display the current day and its scheduled meetings.

Figure 46: Schedule -Today



To view a specific day, click the date displayed in the first line of the schedule pane. The calendar is displayed, and the user can select specific date to view the schedule for that date.

Figure 47: Select specific date



## 5.2 Meeting List (list view)

Meetings screen displays the list of meetings requested by the supplier and approved by the EGC user. The meeting grid displays the meeting(s) held in the past 6 months. The status of the meetings are as follows:

- **Scheduled:** Meetings that are yet to happen are displayed.
- **Minutes Pending:** Meeting that occurred and the minutes of the meeting are yet to be updated.
- **Completed:** Meetings that occurred and the minutes of the meeting are also updated.
- **Cancelled:** Meeting(s) that were cancelled.

Figure 48: List of meetings

Date	Meeting	Time	Title	Customer-Plant	EGC Primary Participant	Participants
19-Dec-25		14:00 - 15:00	Meeting Meeting	EGC Customer-Plant	Customer Name	Customer Name, Meeting ID
09-Dec-25		23:30 - 00:00	Meeting Meeting	EGC Customer-Plant	Customer Name	Customer Name, Meeting ID
05-Dec-25		15:30 - 16:30	Meeting Meeting	EGC Customer-Plant	Customer Name	Customer Name, Meeting ID
02-Dec-25		14:30 - 15:30	Meeting Meeting	EGC Customer-Plant	Customer Name	Customer Name, Meeting ID
25-Nov-25		23:30 - 00:00	Meeting Meeting	EGC Customer-Plant	Customer Name	Customer Name, Meeting ID
21-Nov-25		14:00 - 15:00	Meeting Meeting	EGC Customer-Plant	Customer Name	Customer Name, Meeting ID
11-Nov-25		23:30 - 00:00	Meeting Meeting	EGC Customer-Plant	Customer Name	Customer Name, Meeting ID
07-Nov-25		15:30 - 16:30	Meeting Meeting	EGC Customer-Plant	Customer Name	Customer Name, Meeting ID

On the meeting list screen, the user can do the following:





- Enter any value in the universal search textbox    , the filtered list of meetings is displayed in the grid.
- Click  to open the advanced filters and search for specific meeting. Select the **Date Range**, **From**, **To** dates and click **Apply** to filter the meeting.

Figure 49: Advanced Filter – Meeting list

Date Range \*

From To


Current Year 01/01/2025 12/31/2025

Reset Apply

Date	Meeting	Time	Title	Customer-Plant	EGC Primary Participant	Participants
19-Dec-25		14:00 - 15:00	Meeting Meeting	EGC Customer-Plant	Customer Name	Customer Name, Meeting ID
09-Dec-25		23:30 - 00:00	Meeting Meeting	EGC Customer-Plant	Customer Name	Customer Name, Meeting ID
05-Dec-25		15:30 - 16:30	Meeting Meeting	EGC Customer-Plant	Customer Name	Customer Name, Meeting ID
02-Dec-25		14:30 - 15:30	Meeting Meeting	EGC Customer-Plant	Customer Name	Customer Name, Meeting ID
25-Nov-25		23:30 - 00:00	Meeting Meeting	EGC Customer-Plant	Customer Name	Customer Name, Meeting ID
21-Nov-25		14:00 - 15:00	Meeting Meeting	EGC Customer-Plant	Customer Name	Customer Name, Meeting ID
11-Nov-25		23:30 - 00:00	Meeting Meeting	EGC Customer-Plant	Customer Name	Customer Name, Meeting ID



**Date Range** is a mandatory field to search the grid using **Advanced Filter**. Click **Reset** to clear the selected filters.

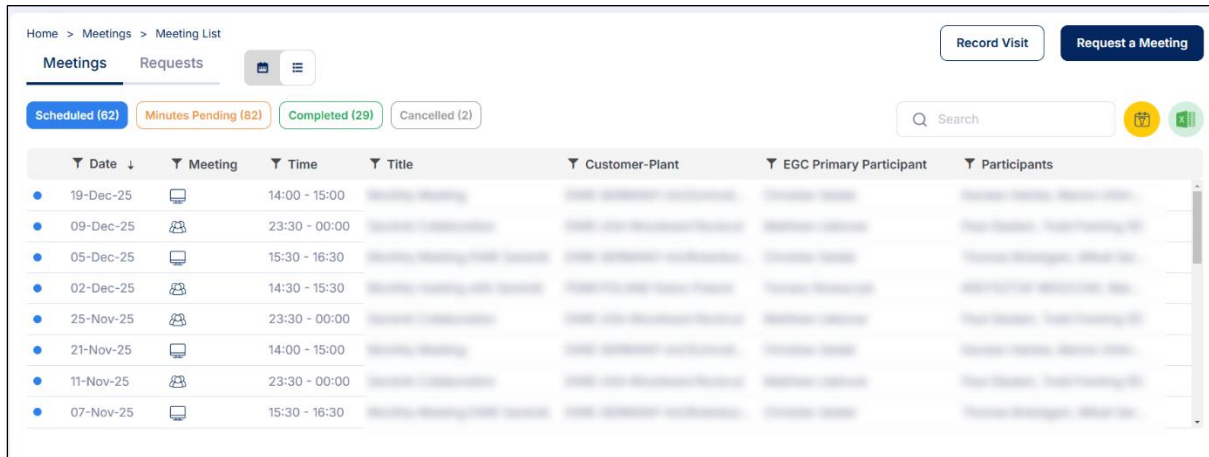
- Click  to export the meeting list to an Excel sheet. The Excel sheet is downloaded to the system.
- Click a specific meeting in the grid to open the meeting details.



## 5.2.1 Scheduled Meeting

The scheduled meetings are requests that are approved by the EGC user and are yet to happen. Enabling the **Scheduled** button in the meeting list screen the grid displays the scheduled meetings.

Figure 50: Scheduled Meetings



Home > Meetings > Meeting List

Meetings Requests

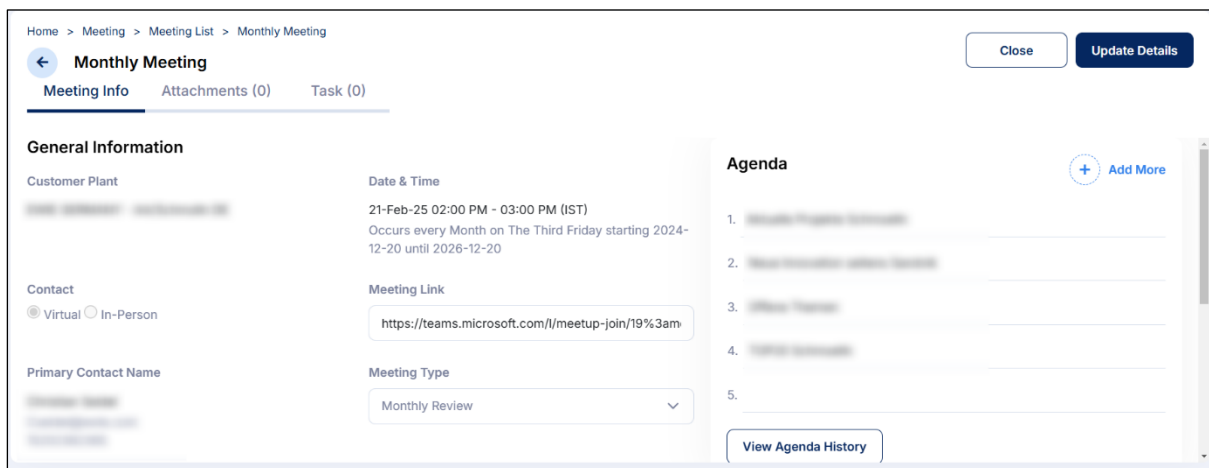
Scheduled (82) Minutes Pending (82) Completed (29) Cancelled (2)

Q Search

Date	Meeting	Time	Title	Customer-Plant	EGC Primary Participant	Participants
19-Dec-25		14:00 - 15:00	Monthly Meeting	ABC Customer - Hyderabad	John Doe	John Doe, Jane Smith, ...
09-Dec-25		23:30 - 00:00	Monthly Meeting	ABC Customer - Hyderabad	John Doe	John Doe, Jane Smith, ...
05-Dec-25		15:30 - 16:30	Monthly Meeting (Web based)	ABC Customer - Hyderabad	John Doe	John Doe, Jane Smith, ...
02-Dec-25		14:30 - 15:30	Monthly Meeting (Web based)	ABC Customer - Hyderabad	John Doe	John Doe, Jane Smith, ...
25-Nov-25		23:30 - 00:00	Monthly Meeting	ABC Customer - Hyderabad	John Doe	John Doe, Jane Smith, ...
21-Nov-25		14:00 - 15:00	Monthly Meeting	ABC Customer - Hyderabad	John Doe	John Doe, Jane Smith, ...
11-Nov-25		23:30 - 00:00	Monthly Meeting	ABC Customer - Hyderabad	John Doe	John Doe, Jane Smith, ...
07-Nov-25		15:30 - 16:30	Monthly Meeting (Web based)	ABC Customer - Hyderabad	John Doe	John Doe, Jane Smith, ...

Click on a specific meeting in the list to view the meeting details.

Figure 51: Scheduled Meeting-Details



Home > Meeting > Meeting List > Monthly Meeting

← Monthly Meeting

Close Update Details

Meeting Info Attachments (0) Task (0)

**General Information**

Customer Plant: ABC Customer - Hyderabad

Date & Time: 21-Feb-25 02:00 PM - 03:00 PM (IST)  
Occurs every Month on The Third Friday starting 2024-12-20 until 2026-12-20

Contact: Virtual In-Person

Meeting Link: <https://teams.microsoft.com/l/meetup-join/19%3am...>

Primary Contact Name: John Doe

Meeting Type: Monthly Review

**Agenda**

1. Review Progress

2. Review Customer - Hyderabad

3. Review Status

4. Review Issues

5. Review Summary

View Agenda History

On the meeting details page, the user can perform any one or all the following:

- **Add More:** Add new agenda points.
- **View Agenda History:** View history if any agenda history exists.
- **Add New:** Add new invitees to the meeting. User can remove a participant by clicking x against the invitee's name.
- Add details such as **Meeting Information**, **Meeting Type** and so on.
- **New Attachment:** Click **New Attachment** in the Attachment tab to add any attachments pertaining to the meeting.



The upload option does not support uploading exe(executable) files.

- User can view tasks attached to the meeting in the **Task** tab of the meeting list screen.

Click **Update Details** to update the scheduled meeting. An email will be sent to the EGC personnel.

## 5.2.2 Minutes Pending Meetings

The minutes pending meetings are meetings that occurred, and the minutes of the meeting have not been updated. Enabling the **Minutes Pending** button in the meeting list screen displays the minutes pending meetings.

Figure 52: Minutes Pending

Y Date ↓	Y Meeting	Y Time	Y Title	Y Customer-Plant	Y EGC Primary Participant	Y Participants
26-Feb-25		08:00 - 08:30	Test Meeting on 26-Feb-25 08:00	Test Plant	Test User	Test User, Test User
24-Feb-25		08:00 - 09:00	Test Meeting on 24-Feb-25 08:00	Test Plant	Test User	Test User, Test User
21-Feb-25		14:00 - 15:00	Test Meeting on 21-Feb-25 14:00	Test Plant	Test User	Test User, Test User
18-Feb-25		23:30 - 00:00	Test Meeting on 18-Feb-25 23:30	Test Plant	Test User	Test User, Test User
15-Feb-25		10:00 - 10:30	Test Meeting on 15-Feb-25 10:00	Test Plant	Test User	Test User, Test User
14-Feb-25		10:00 - 10:30	Test Meeting on 14-Feb-25 10:00	Test Plant	Test User	Test User, Test User
13-Feb-25		10:00 - 10:30	Test Meeting on 13-Feb-25 10:00	Test Plant	Test User	Test User, Test User
12-Feb-25		10:00 - 10:30	Test Meeting on 12-Feb-25 10:00	Test Plant	Test User	Test User, Test User

Click on a specific meeting in the list to view the meeting details.

Figure 53: Minutes Pending-Meeting Details

Home > Meeting > Meeting List > Test Meeting on 24-02-2025 01 from...

← Test Meeting On 24-02-2025 01 From...

Close Update Meeting Minutes

Meeting Info Attachments (1) Task (0)

**General Information**

Customer-Plant: Test Plant

Date & Time: 26-Feb-25 08:00 AM - 08:30 AM (IST)

Meeting Type: Training

Notify: NONE

Contact: In-Person

Room: Test room

Primary Contact Name: Test User

**Absentee (optional)**

Select

**Agenda**

1. Agenda 01 ☐ Mark As Done

2. Agenda Title ☐ Mark As Done

On the meeting details page, the user can perform any one or all the following:

- Select absentees is any from the **Absentee** drop-down list.
- Enable **Mark As Done** against the completed agenda.

- Click **Add More** to add a new agenda.
- Click **Add New** to add an attendee who was not in the list.
- Click **New Attachment** in the **Attachment** tab to add an attachment pertaining to the meeting.
- Tasks assigned to the meeting can be viewed in the **Task** tab of the screen.

Click **Update Meeting Minutes** to update the minutes of the meeting. The meeting minutes are updated, and the meeting is shifted to the **Completed** list.

### 5.2.3 Completed Meetings

The completed meetings are meetings that occurred, and the minutes of the meeting have been updated. Enabling the **Completed** button in the meeting list screen displays the completed meetings.

Figure 54: Completed

▼ Date ▼	▼ Meeting	▼ Time	▼ Title	▼ Customer-Plant	▼ EGC Primary Participant	▼ Participants
26-Feb-25		08:00 - 08:30	Test Meeting on 24-02-2025 01 from...	Test Plant	Test User	Test User, Test User
24-Feb-25		08:00 - 09:00	Test Meeting on 24-02-2025 01 from...	Test Plant	Test User	Test User, Test User
07-Feb-25		15:30 - 16:30	Weekly Meeting (01) from...	Test Plant	Test User	Test User, Test User
04-Feb-25		14:30 - 15:30	Weekly Meeting (01) from...	Test Plant	Test User	Test User, Test User
03-Feb-25		21:30 - 22:00	Weekly Meeting (01) from...	Test Plant	Test User	Test User, Test User
28-Jan-25		10:00 - 10:30	Weekly Meeting (01) from...	Test Plant	Test User	Test User, Test User
14-Jan-25		00:30 - 03:30	Weekly Meeting (01) from...	Test Plant	Test User	Test User, Test User
14-Jan-25		10:00 - 10:30	Weekly Meeting (01) from...	Test Plant	Test User	Test User, Test User

Click on a specific meeting in the list to view the meeting details.

Figure 55: Completed-Meeting Details

Home > Meeting > Meeting List > Test Meeting on 24-02-2025 01 from...

← Test Meeting On 24-02-2025 01 From

Meeting Info Attachments (1) Task (0)

**General Information**

Customer Plant: Test Plant

Date & Time: 26-Feb-25 08:00 AM - 08:30 AM (IST)

Contact: Virtual In-Person

Room: Test room

Primary Contact Name: Test User

Meeting Type: Training

**Agenda**

1. Agenda 01 (Open)

On the meeting details page, the user can perform any one or all of the following:

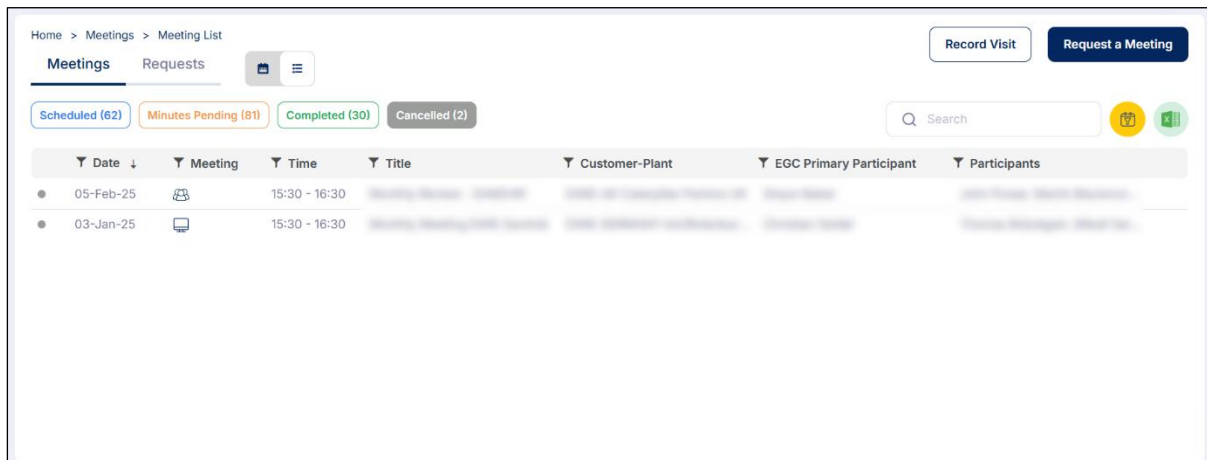
- View meeting information

- Click **New Attachment** in the **Attachment** tab to add attachment pertaining to the meeting.
- Click **New Task** in the Task tab to add a task, its details, assign a task and attach a file to the task.

## 5.2.4 Cancelled Meetings

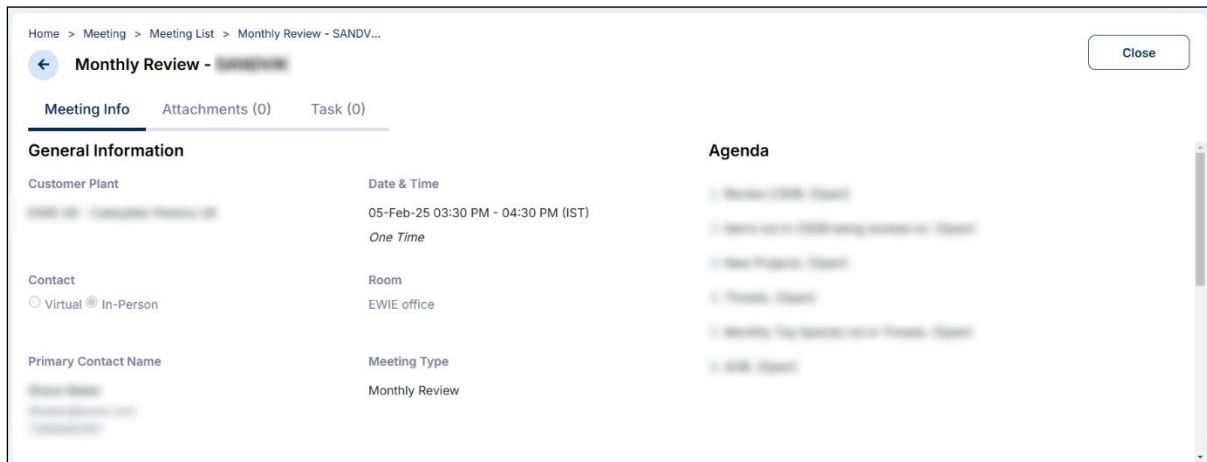
The cancelled meetings are meetings that were scheduled and were cancelled for several reasons. Enabling the **Cancelled** button in the meeting list screen displays the cancelled meetings.

Figure 56: Cancelled Meetings



Click on a specific meeting in the list to view the meeting details.

Figure 57: Cancelled-Meeting Details



## 5.3 Record Visit

The Record Visit feature enables the user to record an in-person meeting after the meeting occurred. This is used to maintain a log of the meeting and the details of the meeting for future reference.

## To record a visit, follow the instructions:


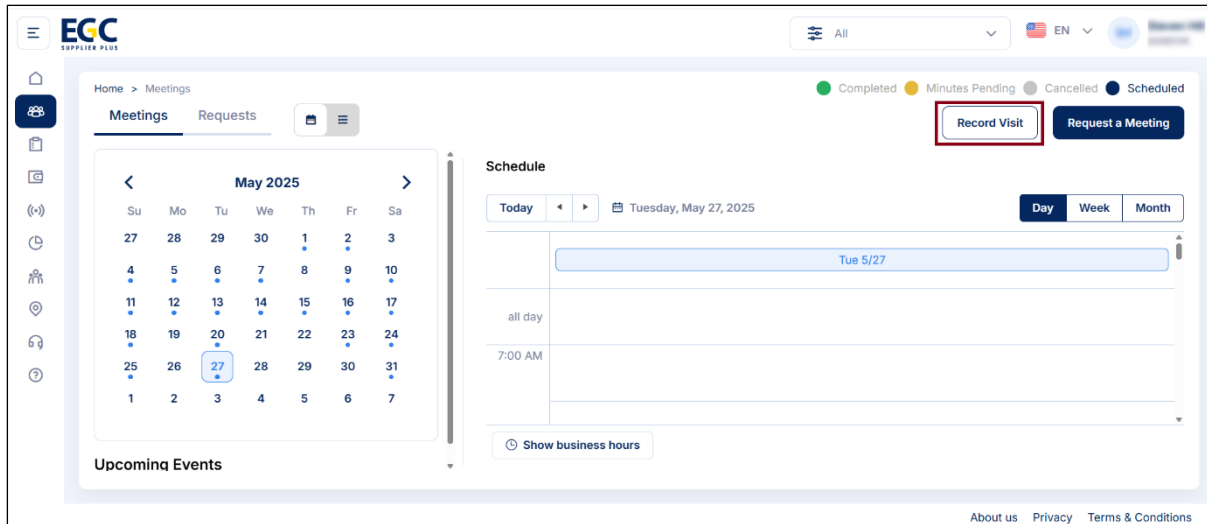
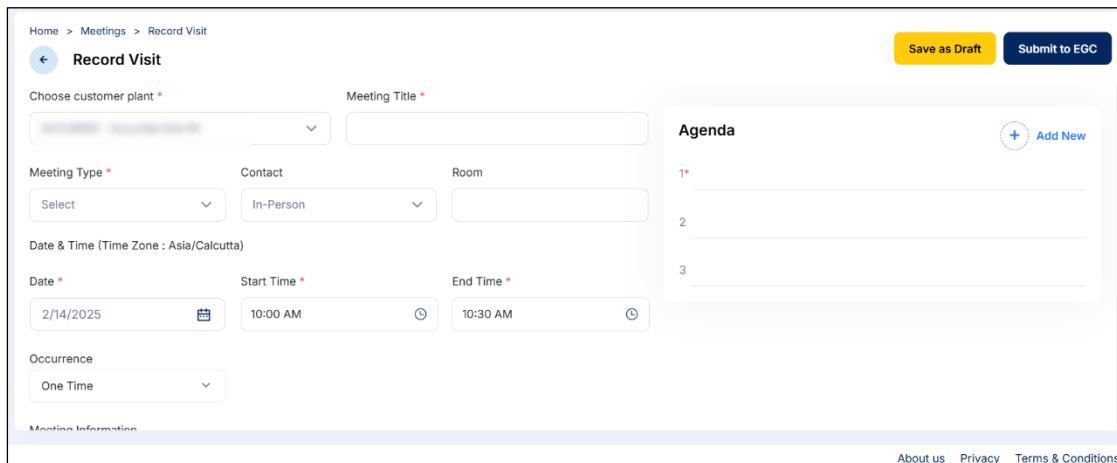
1. Sign in to the EGC Supplier Plus application. The Dashboard screen is displayed.
2. In the main menu, click  icon to open the Meetings screen.

Figure 58: Meetings



3. Click **Record Visit** in the right top corner of the screen.


Figure 59: Record Visit



4. On the screen, enter the following details:

Table 7: Record Visit

Field	Description
<b>Choose customer plant*</b>	Select the customer plant where the visit happened. The plants are populated based on the user preferences set in the user profile. Refer My Profile
<b>Meeting Title*</b>	Enter the suitable title for the meeting
<b>Meeting Type*</b>	Select the type or purpose of the meeting such as support visit, tool delivery and so on
<b>Contact</b>	Select the type of interaction in the meeting (In Person or Virtual)
<b>Room</b>	Enter the meeting room details

<b>Date*</b>	Enter the date/ select the date by clicking the calendar icon. The dates prior to current date and current date are enabled as it is a past meeting.
<b>Start Time*</b>	Select the start time for the meeting
<b>End Time*</b>	Select the end time for the meeting
<b>Occurrence</b>	Select the occurrence of the meeting, if its daily, weekly, monthly or yearly
<b>Meeting Information</b>	Enter the meeting information
<b>Agenda*</b>	Enter the Agenda, the user can add multiple points of agenda by clicking the  <a href="#">Add New</a> . The user should enter at least one point of agenda to record a visit.



All fields marked with asterisk (\*) are mandatory.

- Click **Add New** in the **Invitee List** to select the invitees for the meeting. The **Select Assignee** pop up is displayed.

Figure 60: New Assignee Popup



*By Default, the Email ID of the accessing user is enabled in the Invitee List.*

6. In the Select Assignee popup, do the following:

- By default, **Current Location** is enabled, user can select **All** to display all the users.
- **My Users:** Lists the users from the supplier's organisation. Enable the users to add to the Invitee list.



*The user can add a person who is not an authorized/registered user of the EGC Portal..*

- **EGC Users:** Lists the EGC employees. Enable the users to add to the Invitee list.



*The selected users are enabled and displayed in alphabetical order.*

- **External Users:** Users who are not EGC employees or from the supplier's organisation can be added to the invitee list.
- **New \*\*\*\* Attendee:** Click to add a new attendee from the supplier organization. A popup is displayed. Enter **First Name, Last Name, Email ID, Phone Number** and click **Save**.

Figure 61: New Attendee popup



*Multiple users can be invited from each group. Required to select atleast one EGC primary participant.*

7. Click **Submit to EGC** to submit the recorded visit for approval. The visit is displayed in the submitted list. The recorded visit is submitted to the EGC User/internal application.



*Click **Save as Draft** to save the recorded visit and submit it later.*

8. A confirmation message is displayed, and the visit is displayed in the list on the Requests screen.

The location of the meeting and location details are displayed.

The EGC user can do any one of the following:

- **Approve**-EGC user can approve the visit, and the visit will be displayed in the **Approved** list of requests and with **Minutes Pending** in the **Meetings** list. The participants receive an email.

- **Reject**-EGC User can reject the record of the visit stating the reason for rejection. The visit will be displayed in the **Rejected** list of requests.

## 5.4 Request a Meeting

The Request a Meeting screen enables the supplier to request the EGC member for a meeting. A supplier requests a meeting with an employee to go over important product-related topics, making sure that every facet of the offering is fully considered and tailored to the needs of the EGC user. The supplier can add details/agenda pertaining to the meeting in the request.

The supplier can request a recurring meeting with a combination of past and future meetings.

**To request a meeting, follow the instructions:**


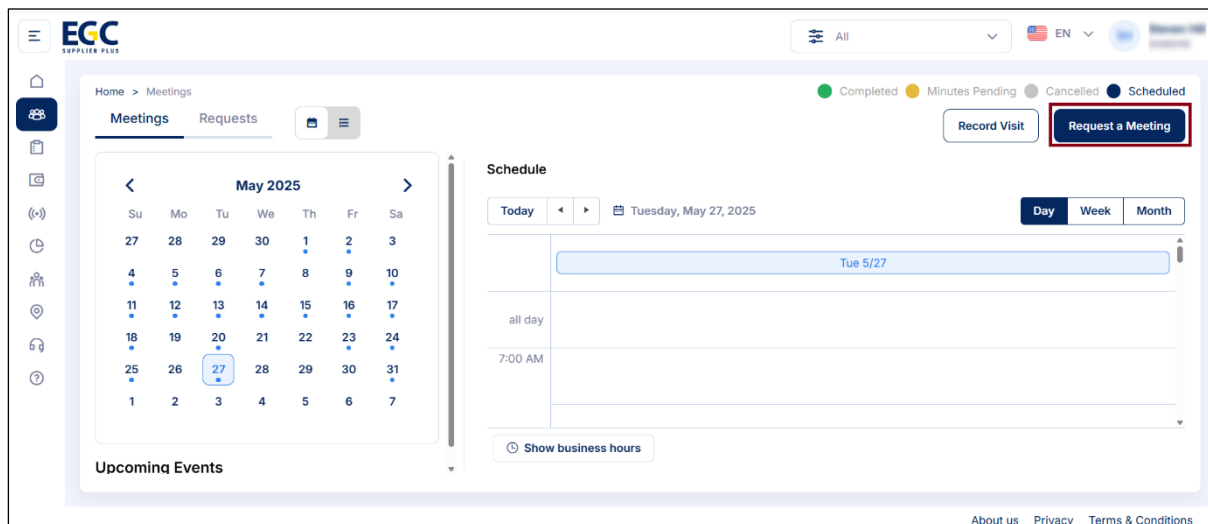
1. Sign in to the EGC Supplier Plus application. The Dashboard screen is displayed.
2. In the main menu, click  icon to open the Meetings screen.

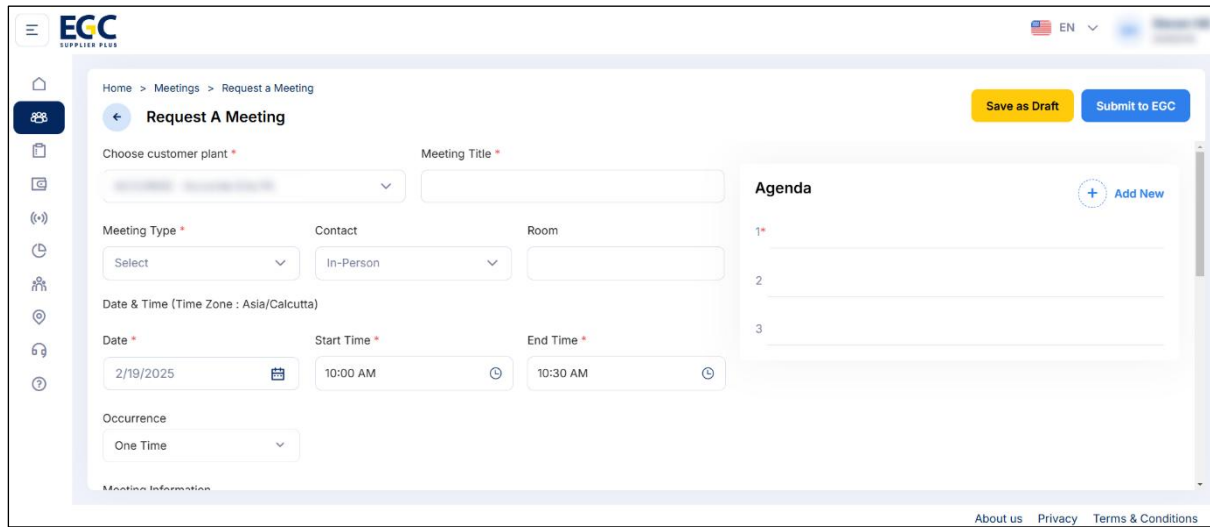
Figure 62: Meetings



3. Click **Request a Meeting** in the right top corner of the screen.




Figure 63: Request a meeting



4. On the screen, enter the following details:

Table 8: Request a meeting

Field	Description
<b>Choose customer plant*</b>	Select the customer plant for the meeting. The plants are populated based on the user preferences set in the user profile. Refer My Profile
<b>Meeting Title*</b>	Enter the suitable title for the meeting
<b>Meeting Type*</b>	Select the type or purpose of the meeting such as support visit, tool delivery and so on
<b>Contact</b>	Select the type of interaction in the meeting (In Person or Virtual)
<b>Room</b>	Enter the meeting room details
<b>Date*</b>	Enter the date/ select the date by clicking the calendar icon
<b>Start Time*</b>	Select the start time for the meeting
<b>End Time*</b>	Select the end time for the meeting
<b>Occurrence</b>	Select the occurrence of the meeting, if its daily, weekly, monthly or yearly.
<b>Meeting Information</b>	Enter the meeting information
<b>Agenda*</b>	Enter the Agenda, the user can add multiple points of agenda by clicking the  <b>Add New</b> . The user should enter at least one point of agenda to record a visit.



All fields marked with asterisk (\*) are mandatory.

5. Click **Add New** in the **Invitee List** to select the invitees for the meeting. The **Select Assignee** pop up is displayed.

Figure 64: Select Assignee



By Default, the Email ID of the accessing user is enabled in the Invitee List.

6. In the Select Assignee popup, do the following:

- By default, **Current Location** is enabled, user can select **All** to display all the users.
- **My Users**: Lists the users from the supplier's organisation. Enable the users to add to the Invitee list.
- **EGC Users**: Lists the EGC employees. Enable the users to add to the Invitee list.



The selected users are enabled and displayed in alphabetical order.

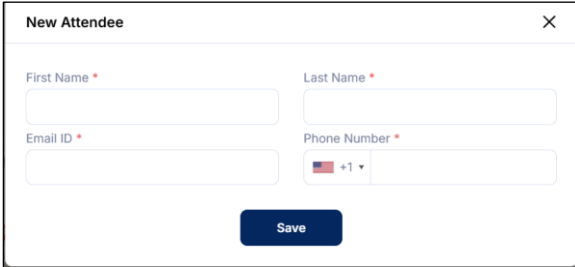
- **External Users**: Users who are not EGC employees or from the supplier's organisation can also be added to the invitee list.
- **New \*\*\*\* Attendee**: Click to add a new attendee from the supplier organization. A popup is displayed.



\*\*\*\* refers to the supplier company name. User with same domain/company as the logged in user can be added.

- Enter **First Name, Last Name, Email ID, Phone Number** and click **Save**.

Figure 65: New Attendee popup



The 'New Attendee' popup form contains the following fields and controls:

- First Name \***: Text input field.
- Last Name \***: Text input field.
- Email ID \***: Text input field.
- Phone Number \***: Text input field with a country code dropdown menu showing '+1'.
- Save**: A blue button at the bottom center.



*Multiple users can be invited from each group. Minimum of one EGC user should be selected to request a meeting.*

7. Click **Submit to EGC** to submit the meeting request for approval, click **Save as Draft** to save the request and submit it later.
8. A confirmation message, **Meeting request has been submitted to EGC successfully** is displayed. The meeting request is displayed in the list of requests. The request is sent to the internal user/EGC user as an Email.

The location of the meeting and location details are displayed.

The EGC user can perform any one of the following:

- **Accept**-EGC user can approve the meeting. The meeting will be displayed in the **Approved** list of requests as a **Scheduled Meeting** in the **Meetings** list. The participants receive an email.
- Propose new time for the meeting.



*The user cannot propose a new time for recurring meeting as it happens at the same time based on the requested occurrence.*

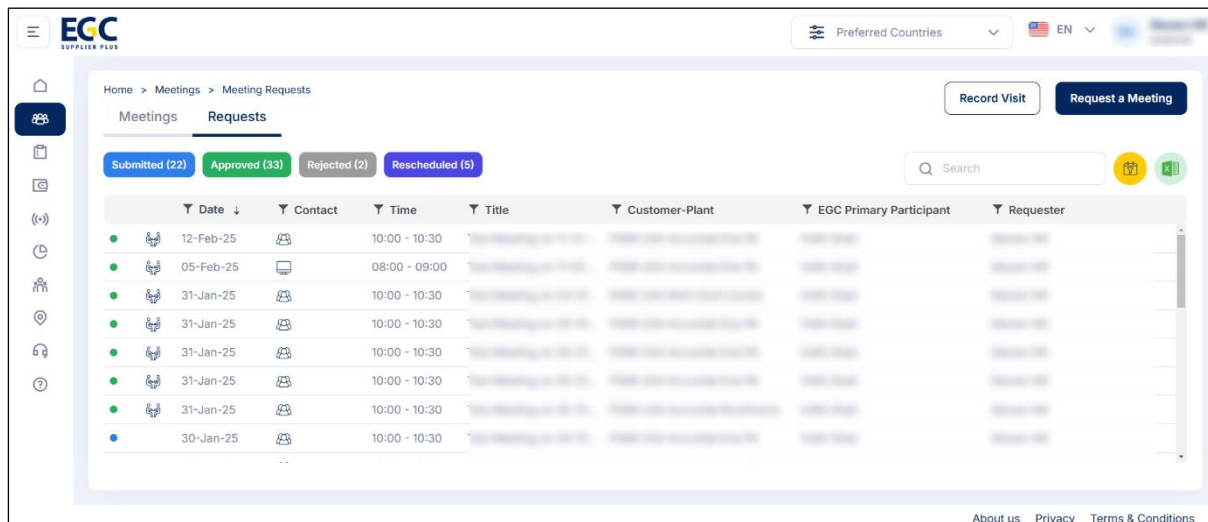
- Reject the meeting stating the reason for rejection.

The request is converted to a meeting if the EGC user accepts the request.

## 5.5 Meeting Requests

The Requests tab of the meetings displays all the meeting requests brought by the supplier.

Figure 66: Meeting Requests



The supplier can view drafts, submitted, approved, rejected and rescheduled meetings and the number of meetings in shown by braces next to the meeting status. The supplier can filter the requests by status using the buttons above the grid.

Figure 67: Status of meeting requests.



The various statuses for the meeting are as follows:

- **Submitted:** Meeting requested or recorded by the supplier which are sent for approval by the EGC user
- **Approved:** Meeting requested or recorded by the supplier and approved by the EGC user
- **Requested for Clarification:** Meeting requested and were asked for clarification from an EGC user.
- **Discarded:** The request for meetings that were **discarded**.
- **Rejected:** Meeting requested by the supplier and rejected by the EGC user
- **Rescheduled:** Meeting scheduled by the supplier and rescheduled by the EGC user
- **Draft:** Meeting request saved as draft by the supplier for later submission

On the meeting request screen, the user can do the following:


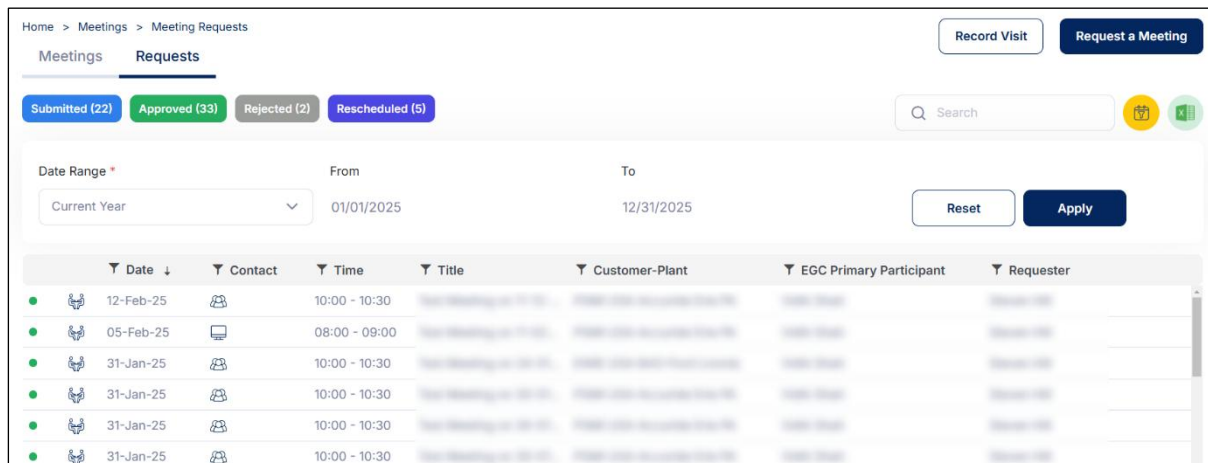

- Enter any value in the universal search textbox  , the filtered list of requests is displayed in the grid.
- Click  to open the advanced filters and search for specific meeting requests. Select the **Date Range, From, To** dates and click **Apply** to filter the meeting requests.

Figure 68: Advanced Filter – Meeting Requests




**Date Range** is a mandatory field to search the grid using **Advanced Filter**. Click **Reset** to clear the selected filters.

- Click  to export the meeting request list to an Excel sheet. The Excel document is downloaded to the system.
- Click a specific meeting in the grid to open the meeting details.

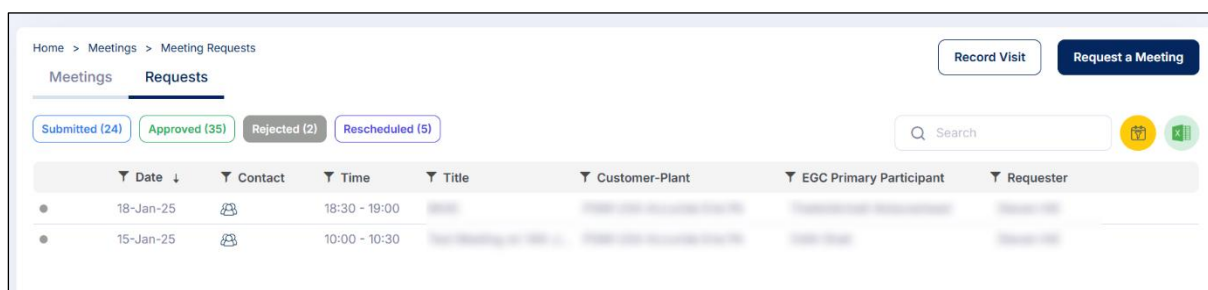
### 5.5.1 Resubmit a rejected request

A rejected request can be resubmitted by the supplier by adding changes to the request or by proposing a new time.

**To resubmit a rejected request, do the following:**

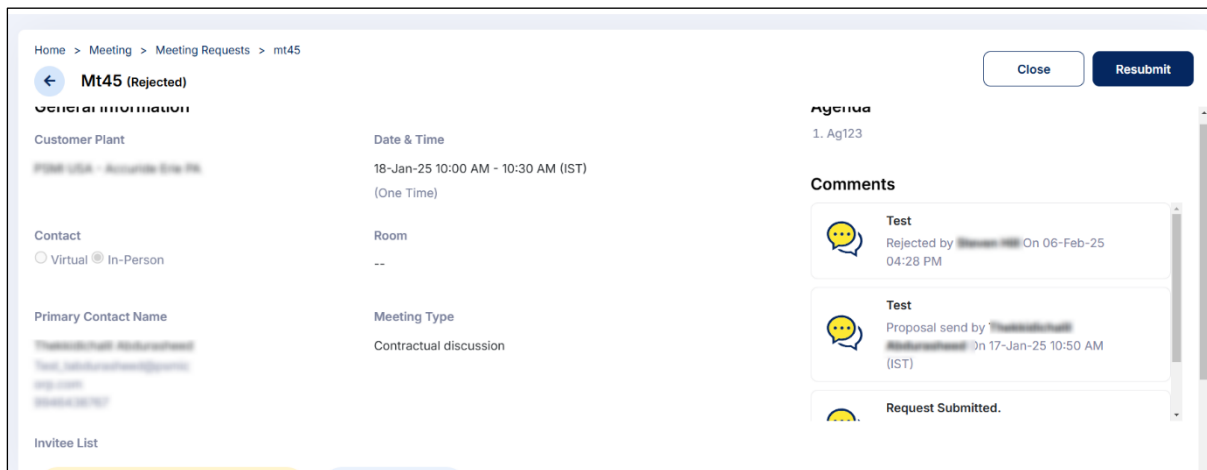
1. In the Meeting Request screen, click the **Rejected** button above the grid. The rejected requests are displayed in the grid.

Figure 69: Rejected list of requests



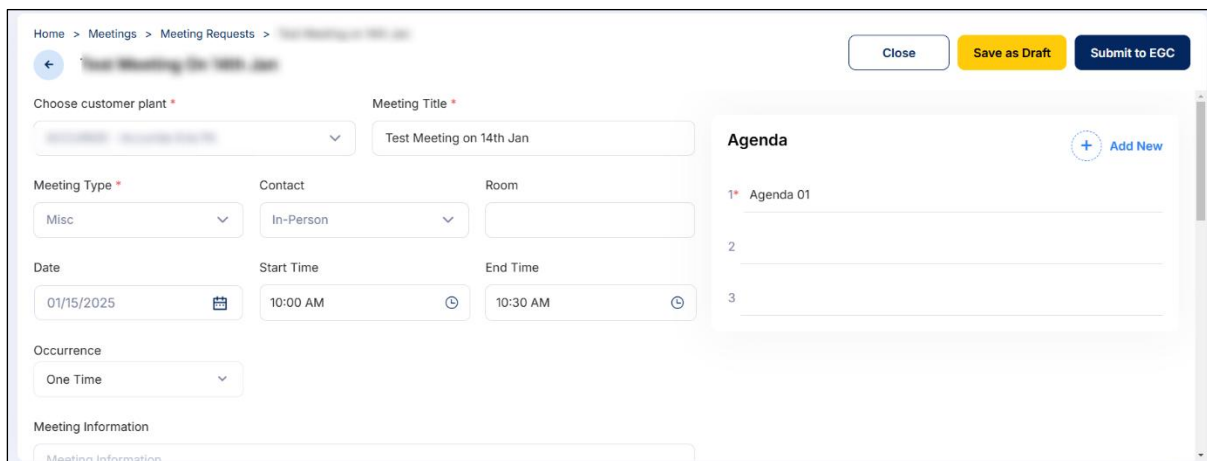
- Click on a specific request and the request details are displayed.

Figure 70: Request details



2. Click **Resubmit** and the request is opened in edit mode.

Figure 71: Submit a Request



3. Enter/Edit the details of the request.
4. Click **Submit to EGC** to resubmit the request for approval. Click **Save as Draft** to save the request and submit it later.
5. A confirmation message, **Meeting request has been submitted to EGC successfully** is displayed. The meeting request is displayed in the submitted list of requests. The request is sent to the internal user/EGC user as an Email.

The EGC user can perform any one of the following:

- **Accept**-EGC can approve the meeting. The meeting will be displayed in the **Approved** list of requests and as **Scheduled Meeting** in the **Meetings** list. The participants receive an email.
- Propose new time for the meeting.



*The user cannot propose a new time for recurring meeting as it happens at the same time based on the requested occurrence.*

- Reject the meeting stating the reason for rejection.

The request is converted to a meeting if the EGC user accepts the request and the attendees are notified.

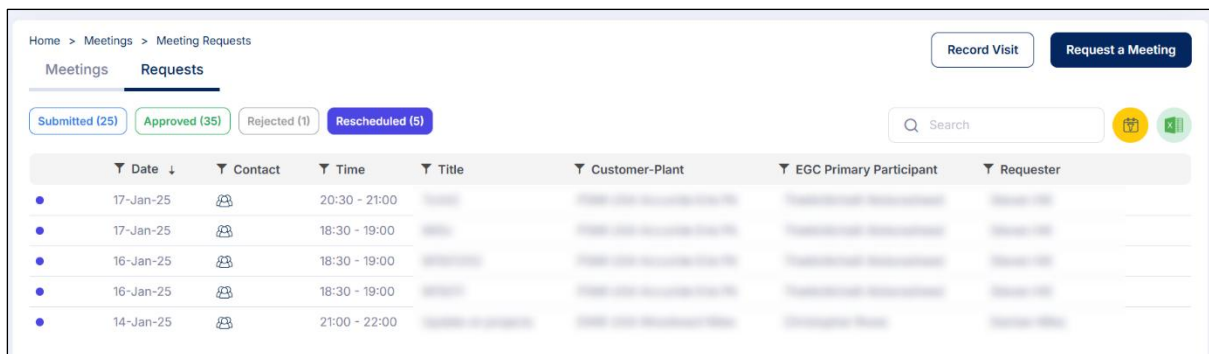
## 5.5.2 Rescheduled meeting request

A rescheduled meeting is the request by the EGC user proposing a new time for the meeting request sent by the supplier.

**To accept/decline a rescheduled meeting request, do the following:**

1. In the Meeting Request screen, click the **Rescheduled** button above the grid. The rescheduled requests are displayed in the grid.

Figure 72: Rescheduled requests



Home > Meetings > Meeting Requests

Record Visit Request a Meeting

Submitted (25) Approved (35) Rejected (1) Rescheduled (5)

Search

Date	Contact	Time	Title	Customer-Plant	EGC Primary Participant	Requester
17-Jan-25		20:30 - 21:00				
17-Jan-25		18:30 - 19:00				
16-Jan-25		18:30 - 19:00				
16-Jan-25		18:30 - 19:00				
14-Jan-25		21:00 - 22:00				

2. Click the meeting request and the meeting details are displayed.

Figure 73: Rescheduled meeting request



Home > Meeting > Meeting Requests > tcmt2

Close Decline Accept

**General Information**

Customer Plant: [Redacted]

Date & Time: 17-Jan-25 10:00 AM - 10:30 AM (IST)  
17-Jan-25 08:30 PM - 09:00 PM (IST)  
(One Time)

Contact: Virtual In-Person

Room: --

Primary Contact Name: [Redacted]

Meeting Type: Contractual discussion

**Agenda**

1. Vb

**Comments**

[Redacted]

[Redacted]

3. Click **Accept** to accept the request. The status is updated to the EGC user.



The user can click **Decline** to decline the new proposed time. The status is updated to the EGC user.


## 6. Tasks

The task screen displays all the tasks of the supplier. Users can easily monitor the status of each task, categorized as in-progress, not started, or completed, ensuring efficient workflow management. Additionally, the screen displays the priority of tasks, providing a clear view of task urgency and facilitating effective project oversight.

Figure 74: Tasks

Task	Due Date	Customer-Plant	Created By	Assigned To
Task 1	04-Apr-25	Customer-Plant	Created By	Assigned To
Task 2	27-Feb-25	Customer-Plant	Created By	Assigned To
Task 3	26-Feb-25	Customer-Plant	Created By	Assigned To
Task 4	26-Feb-25	Customer-Plant	Created By	Assigned To
Task 5	26-Feb-25	Customer-Plant	Created By	Assigned To
Task 6	30-Jan-25	Customer-Plant	Created By	Assigned To
Task 7	24-Jan-25	Customer-Plant	Created By	Assigned To
Task 8	17-Jan-25	Customer-Plant	Created By	Assigned To
Task 9	16-Jan-25	Customer-Plant	Created By	Assigned To

There are two categories for the tasks:

- a task assigned to a meeting (a meeting icon  is displayed with the task name)
- an independent or a standalone task

### 6.1 Create New Task

The screen allows users to create new tasks effortlessly by entering essential details. Users can assign tasks to specific individuals, set priority levels to ensure timely completion, and attach relevant files for comprehensive context.

**To create a new task, follow the instructions:**

1. On the Tasks screen, click **Create New Task**. The screen is displayed as shown.



Figure 75: Create new task

The screenshot shows the 'Create New Task' interface. At the top, there is a breadcrumb trail: 'Home > Tasks > Create New Task'. To the right of the breadcrumb are 'Close' and 'Save' buttons. The form is titled 'Tasks'. It contains several input fields: 'Customer-Plant' with a dropdown arrow, 'Meeting Title' with a dropdown showing 'Select', 'Task Title' as a text input, 'Due Date' with a date input showing '02/25/2025' and a calendar icon, and 'Priority' with a dropdown showing 'Low'. Below these is a 'Comments' text area. At the bottom is the 'Assigned To' section with a '+ New Assignee' button.

2. On the screen, do the following:

- **Customer-Plant\***: Select the customer plant from the drop-down list.



*The Customer-Plant drop down list is populated based on the country and site preferences set in the user profile.*

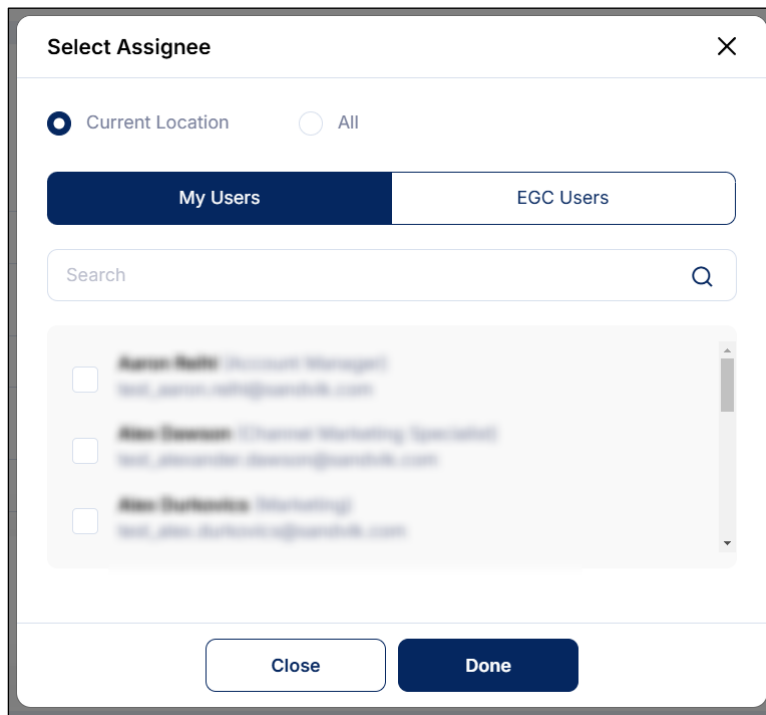
- **Meeting Title**: Select the meeting from the list if the task is related to a specific meeting.



*The task does not have to be allocated to a meeting; it can be created independently as a standalone task.*

- **Task Title\***: Enter the title for the task.
- **Due Date\***: Select the finish date from the calendar/enter the due date.
- **Priority\***: Select the priority to assign to the task. Task can be low, high or medium priority.
- **Comments**: Enter the comments if any.
- **Assigned To\***: Click **New Assignee**, the **Select Assignee** popup is displayed. In the Select Assignee popup, do the following:

Figure 76: Select Assignee



- By default, **Current Location** is enabled, user can select **All** to display all the users.
- **My Users**: Lists the users from the supplier's organisation. Enable the users to assign the task.
- **EGC Users**: Lists the EGC employees. Enable the users to assign the task.



*The selected users are enabled and displayed in alphabetical order.*

- Click **Add Attachment** in the **Attachment** tab to attach files relevant to the task.






*The upload option does not support uploading exe files.*

3. Click **Save**. The new task is added to the task list with **Not Started** status.

## 6.2 List of tasks

The tasks screen displays the list of tasks. Three priorities are used to categorise the tasks:

-  - High Priority
-  - Medium Priority
-  - Low Priority

On the task listing screen, the user can do the following:

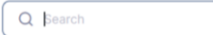



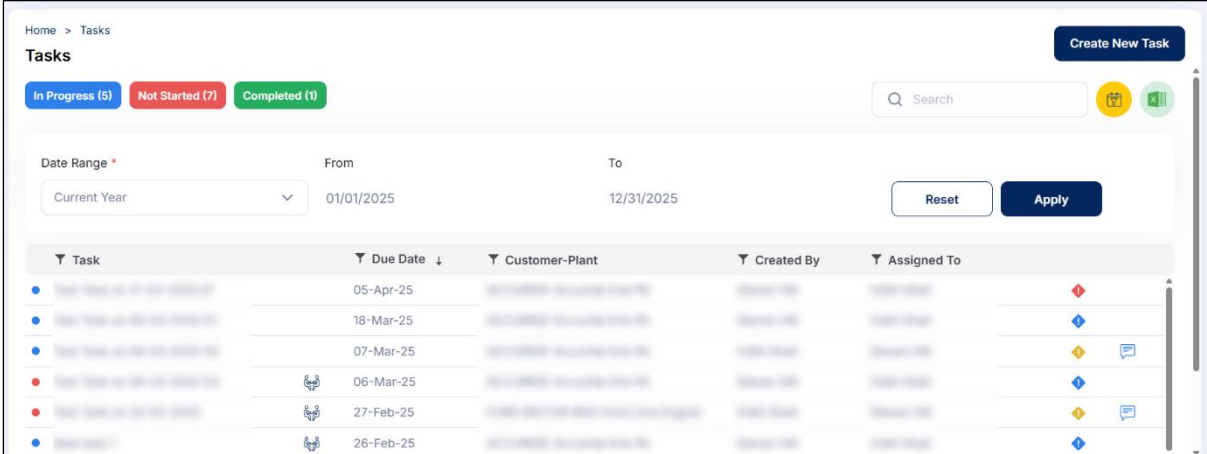
- Enter any value in the universal search textbox    , the filtered list of tasks is displayed in the grid.
- Click  to open the advanced filters and search for specific task. Select the **Date Range**, **From**, **To** dates and click **Apply** to filter the meeting.

Figure 77: Advanced Filter – Task list




**Date Range** is mandatory field to search the grid using **Advanced Filter**. Click **Reset** to clear the selected filters.



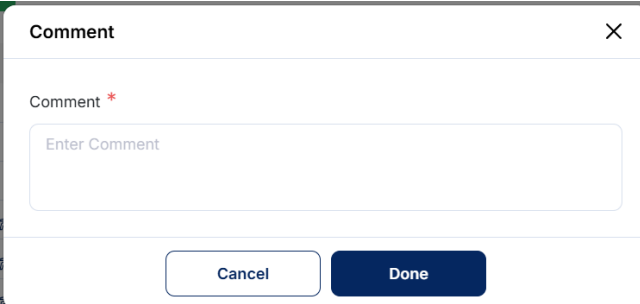
- Click  to export the task list to an Excel sheet. The Excel document is downloaded to the system.
- Click a specific task in the grid to open the task details.
- Click the comment icon  corresponding to the task to add a comment. A popup is displayed to add comment. The comment can be viewed in the task details.

Figure 78: New comment




If the logged-in user is the assigned user, the user can add a comment. The comments are displayed in the task details.

## 6.2.1 In Progress tasks

Tasks that are started and not completed are termed as IN Progress tasks. Enable the In Progress button above the grid to filter the in-progress tasks.

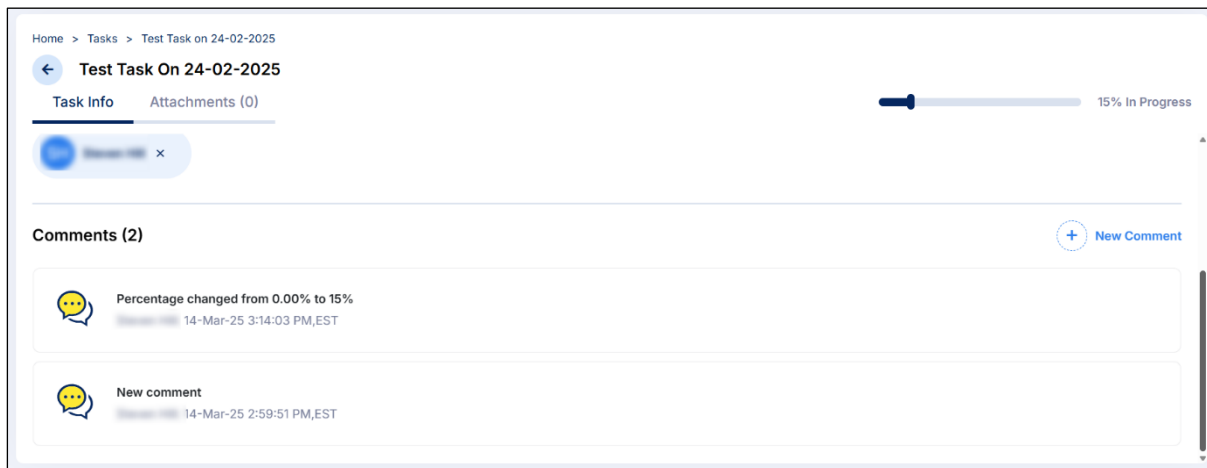


Figure 81: Select Assignee

- By default, **Current Location** is enabled, user can select **All** to display all the users.
- **My Users**: Lists the Supplier Users from your company who selected this location in their profile. Enable the users to assign the task.
- **EGC Users**: Lists the EGC employees. Select the EGC Users that you want to assign the task to.
- Click **New Comment** to add a comment to the task details. A popup is displayed to add comment. The comment can be viewed in the task details.

Figure 82: New comment

Figure 83: Comments



- Click **Add Attachment** in the **Attachment** tab to attach files relevant to the task.



*The upload option does not support uploading exe (executable) files.*

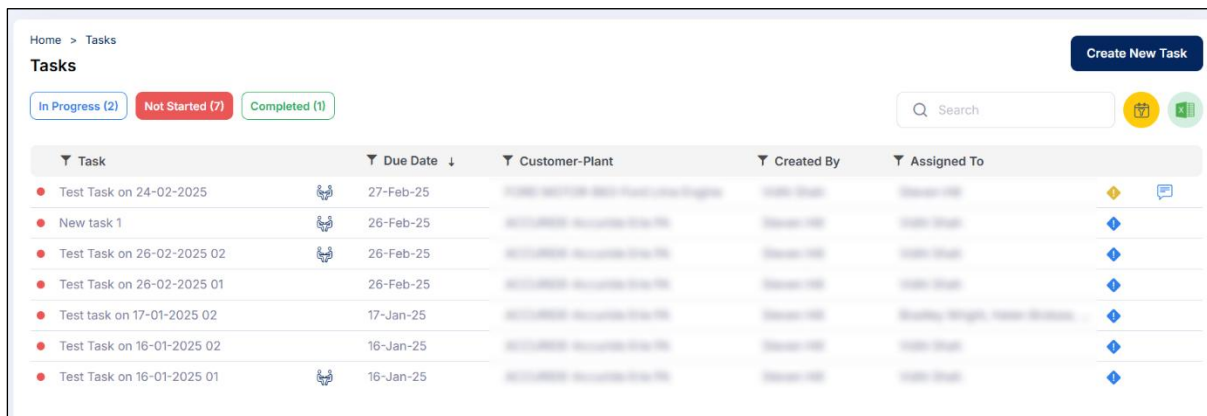
The task details are updated. The assignee will be notified via an Email.

## 6.2.2 Not started tasks

Tasks that are assigned to a user but were not started are termed as Not Started tasks.

Enable the Not Started button above the grid to filter the Not Started tasks.

Figure 84: Not Started tasks



Click on a specific record in the grid to view the task details.

Figure 85: Not Started task details

Home > Tasks > Test Task on 26-02-2025 ...

**Test Task On 26-02-2025 02**

Task Info Attachments (0) 0% In Progress

Task	Customer-Plant	Created By	Priority
Test Task on 26-02-2025 02		Steven Hill	Low

Due Date: 02/26/2025 Status: Not Started

Assigned To (1) [New Assignee](#)

Comments (0) [New Comment](#)

On the task details screen, the user can perform the following:

- Update/change **Due Date** by selecting the date from calendar/entering the date in the textbox.
- Update the **In Progress** percentage by clicking on the bar.
  - 0% indicates the task is not started and the status is updated to **Not Started**
  - Percentage >0 and <100 indicated task is in progress and the status is updated to **In Progress**
  - 100% indicates the task is completed and the status is updated to **Completed**.



*Updating **Due Date** and **In Progress** percentage can be done by the admin, assigned user or the user who created the task.  
The percentage change in the **In Progress** bar and the comments added will be updated in the comment section of the task details.*

- Assign task by clicking **New Assignee**, the **Select Assignee** popup is displayed. In the Select Assignee popup, do the following:

Figure 86: Select Assignee

**Select Assignee** [X]

☒ Current Location ☐ All

**My Users** EGC Users

Search [Q]

- ☐ Aaron Reilly (Account Manager)  
test\_aaron\_reilly@gsarduk.com
- ☐ Alex Dawson (Channel Marketing Specialist)  
test\_alexander\_dawson@gsarduk.com
- ☐ Alex Durkovic (Marketing)  
test\_alex\_durkovic@gsarduk.com

Close Done

- By default, **Current Location** is enabled, user can select **All** to display all the users.
- **My Users**: Lists the users from the supplier's organisation. Enable the users to assign the task.
- **EGC Users**: Lists the EGC employees. Enable the users to assign the task.
- Click **New Comment** to add a comment to the task details. A popup is displayed to add comment. The comment can be viewed in the task details.

Figure 87: New comment

**Comment** [X]

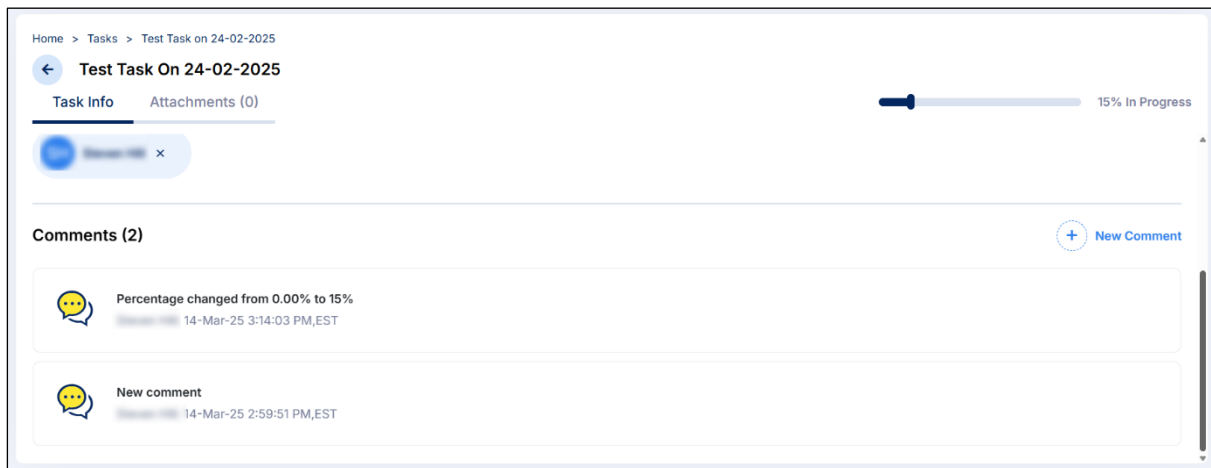
Comment \*

Enter Comment

Cancel Done



Figure 88: Comments



- Click **Add Attachment** in the **Attachment** tab to attach files relevant to the task.



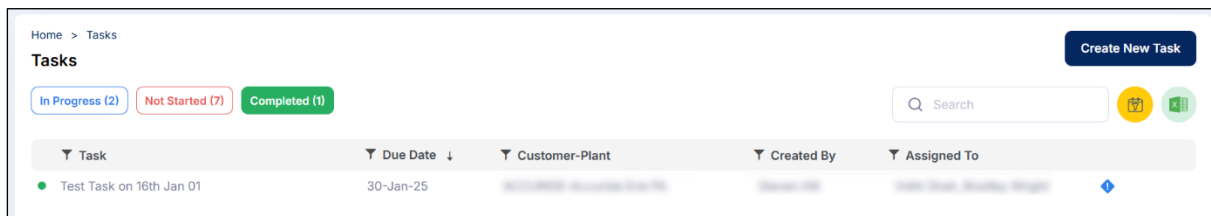
*The upload option does not support uploading exe files.*

The task details are updated. The assignee will be notified via an Email.

## 6.2.3 Completed tasks

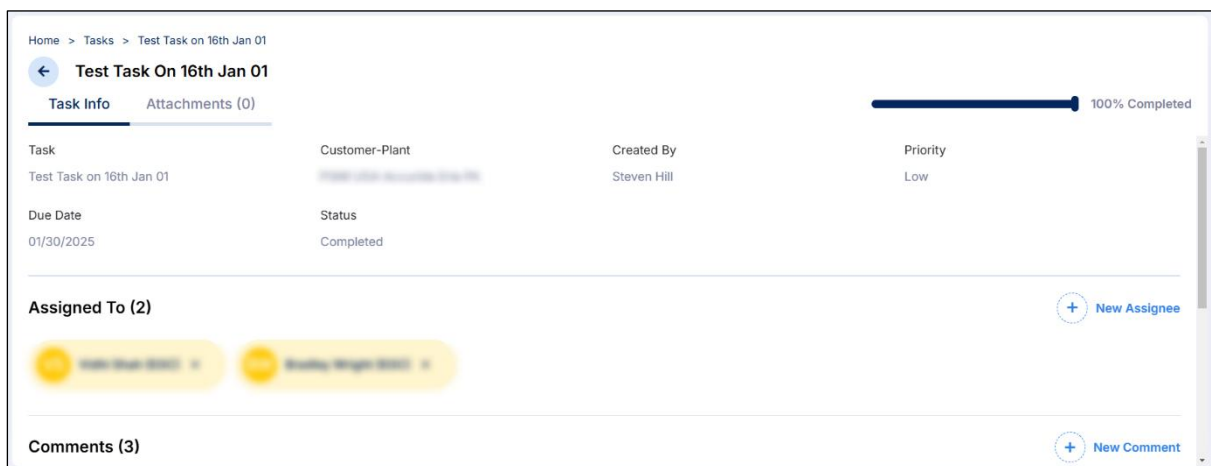
Tasks that are completed are termed as completed tasks. Enable the Completed button above the grid to filter the completed tasks.

Figure 89: Completed tasks



Click on a specific record in the grid to view the task details.

Figure 90: Completed task details



On the task details screen, the user can perform the following:

- Update/change **Due Date** by selecting the date from calendar/entering the date in the textbox.
- Update the **In Progress** percentage by clicking on the bar.
  - 0% indicates the task is not started and the status is updated to **Not Started**
  - Percentage >0 and <100 indicated task is in progress and the status is updated to **In Progress**
  - 100% indicates the task is completed and the status is updated to **Completed**.



*Updating **Due Date** and **In Progress** percentage can be done by the admin, assigned user or the user who created the task.*

*The percentage change in the **In Progress** bar and the comments added will be updated in the comment section of the task details.*

- Assign task by clicking **New Assignee**, the **Select Assignee** popup is displayed. In the Select Assignee popup, do the following:

Figure 91: Select Assignee

- By default, **Current Location** is enabled, user can select **All** to display all the users.
- **My Users**: Lists the users **from** the supplier's organisation. Enable the users to assign the task.
- **EGC Users**: Lists the EGC employees. Enable the users to assign the task.
- Click **New Comment** to add a comment to the task details. A popup is displayed to add comment. The comment can be viewed in the task details.

Figure 92: New comment

Figure 93: Comments

- Click **Add Attachment** in the **Attachment** tab to attach files relevant to the task.



*The upload option does not support uploading exe (executable) files.*

The task details are updated. The assignee will be notified via an Email.

## 7. Cost Saving

Cost Saving is the amount saved by the customer when an existing product is replaced with a new product. The cost savings are predicted or forecast based on the agreement between the End-Customer and the EGC personnel.

The Supplier can only respond to RFPs raised by the plant or the customers which have been added to their profile. The supplier can only view the projects/RFPs raised by the plant/Company that were not added to their profile.

Figure 94: Cost Savings

Home > Cost Savings

**Cost Savings**

Opportunities & RFP(24) Open Projects (106) Completed Projects (544)

Missed Submission Dates ☐

Search

New (1) Awaiting Customer Submission (14) Awaiting Customer Approval To Test (9)

	Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#	Submission Due	
	32933	EGC Ide...	03-24-25					Tool			1
	32911	EGC Ide...	03-24-25					Tool			1
	32664	EGC Ide...	03-07-25					Tool			1
	32623	EGC Ide...	03-06-25					Tool	TU L4 Worksh...		1
	32582	EGC Ide...	03-04-25					Tool			1

The Supplier User can perform the following general options in the cost saving screen:

- The Advanced Search option enables the Supplier User to search for specific records in the cost saving modules.

Figure 95: Advanced Search

Home > Cost Savings

**Cost Savings**

Missed Submission Dates ☐

Opp ID/Idea ID

Customer

Plant

Department

Production Unit

Production Part

Feature

Material

Idea Status

Point of origin

Test Objective

Reason For Item Change

EGC Item #

Customer Item #

Reset Apply

- Enter any value in the Search textbox  to search for a specific record.
- Clicking on any column name in the grid enables the Supplier User to sort the record in ascending or descending order of the selected column.
- Toggle the **Missed Submission Dates** field to view the RFPs that missed the submission date.

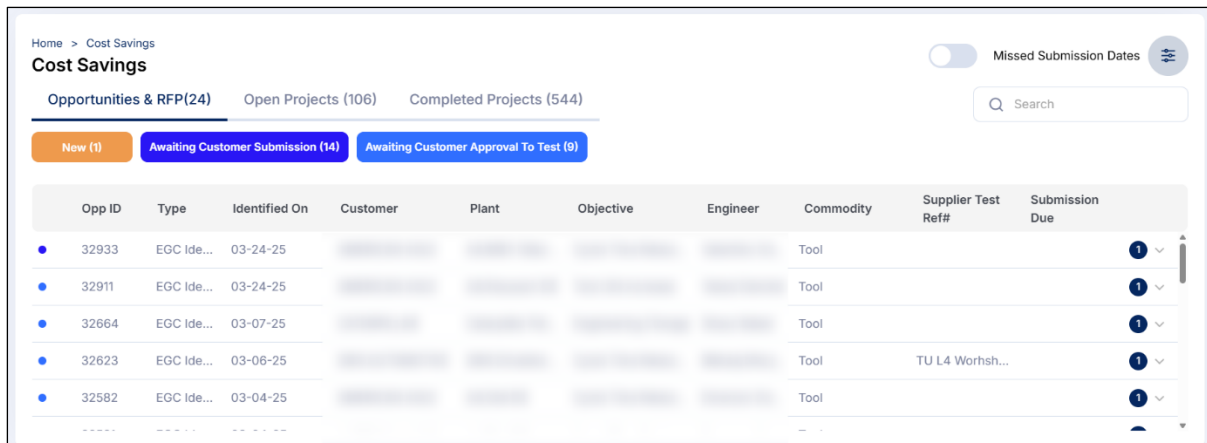
## 7.1 Opportunities and RFPs

Opportunities are ideas created by the EGC personnel for the End Customer and are shared to the privileged suppliers or Supplier Portal enabled suppliers. The EGC personnel shares the opportunities as RFPs to the supplier. The supplier can respond to the RFP by filling in the needed values as a proposal. Once a specific End Customer responds to the RFP, another supplier cannot respond to the same RFP.

The supplier can respond to the RFP only if the plant/site which raised the RFP is enabled in the supplier's profile.

The Opportunities and RFPs tab displays the opportunities raised by the EGC personnel. The opportunities are segregated into 3 types: New, Awaiting Customer Submission, Awaiting Customer Approval to Test.

Figure 96: Opportunities and RFPs



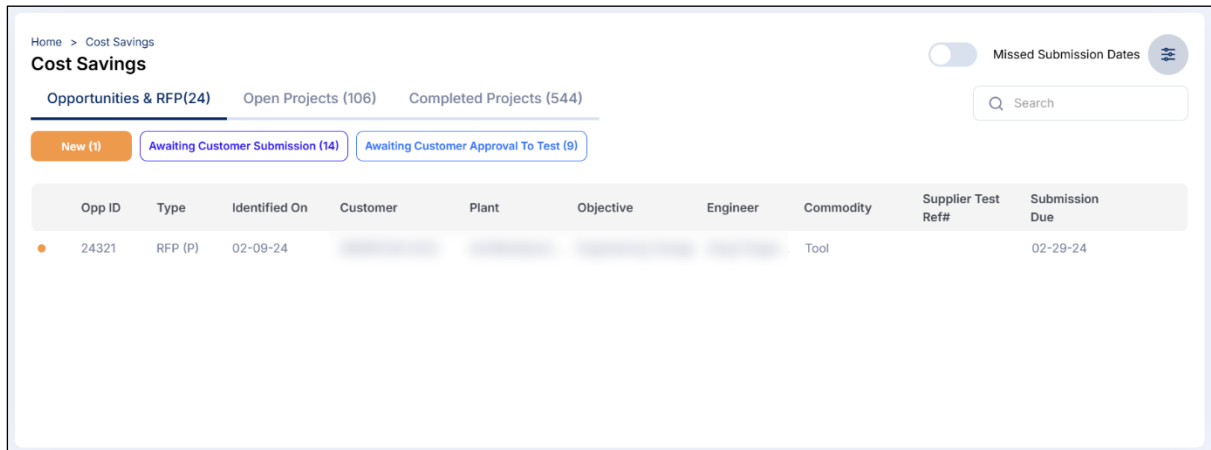
Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#	Submission Due
32933	EGC Ide...	03-24-25					Tool		1
32911	EGC Ide...	03-24-25					Tool		1
32664	EGC Ide...	03-07-25					Tool		1
32623	EGC Ide...	03-06-25					Tool	TU L4 Worsh...	1
32582	EGC Ide...	03-04-25					Tool		1

### 7.1.1 New Opportunities

New opportunities are the opportunities or RFPs sent by the EGC personnel to the privileged suppliers. The supplier can view the details of the opportunity and can submit the proposal to EGC with their values. The supplier can save the RFP or can mark the opportunity as No Quote if the supplier does not want to proceed with the RFP.

Click the New button in the Opportunities and RFPs tab to display the new RFPs sent by the EGC personnel. The RFPs can be viewed by all Supplier Portal enabled suppliers. Suppliers who have the specific plant enabled in their profile can respond to the new RFP.

Figure 97: Opportunities and RFPs – New



Home > Cost Savings

**Cost Savings**

Opportunities & RFP(24) Open Projects (106) Completed Projects (544)

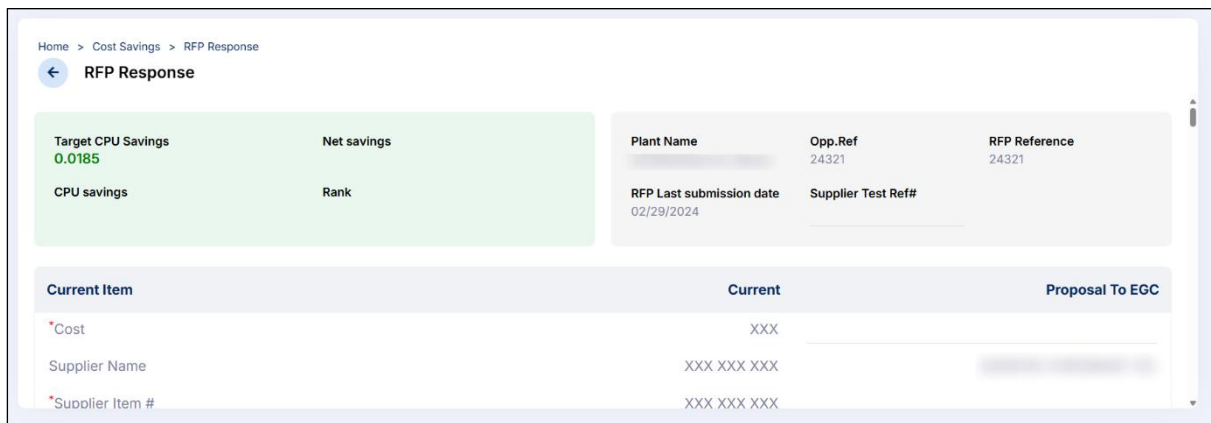
New (1) Awaiting Customer Submission (14) Awaiting Customer Approval To Test (9)

Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#	Submission Due
24321	RFP (P)	02-09-24					Tool		02-29-24

Click any RFP to open the details. The Supplier User who has access to the plant (based on the preferences set in My Profile) can only respond on the RFP.

The screen for the Supplier Users who have no access to the plant is as shown.

Figure 98: New RFP Response – Plant not enabled



Home > Cost Savings > RFP Response

← RFP Response

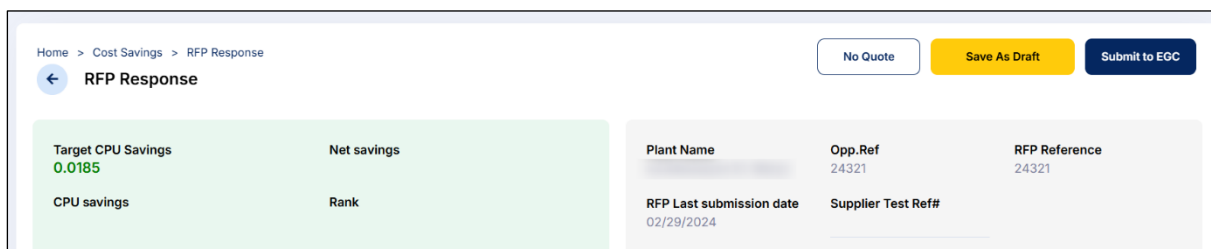
Current Item	Current	Proposal To EGC
*Cost	XXX	
Supplier Name	XXX XXX XXX	
*Supplier Item #	XXX XXX XXX	

Target CPU Savings: 0.0185  
Net savings  
CPU savings  
Rank

Plant Name: [Redacted]  
Opp.Ref: 24321  
RFP Reference: 24321  
RFP Last submission date: 02/29/2024  
Supplier Test Ref#

The RFP Response screen for the Supplier Users who have access to the plant is as shown.

Figure 99: New RFP Response – Plant enabled



Home > Cost Savings > RFP Response

← RFP Response

No Quote Save As Draft Submit to EGC

Current Item	Current	Proposal To EGC
*Cost	XXX	
Supplier Name	XXX XXX XXX	
*Supplier Item #	XXX XXX XXX	

Target CPU Savings: 0.0185  
Net savings  
CPU savings  
Rank

Plant Name: [Redacted]  
Opp.Ref: 24321  
RFP Reference: 24321  
RFP Last submission date: 02/29/2024  
Supplier Test Ref#

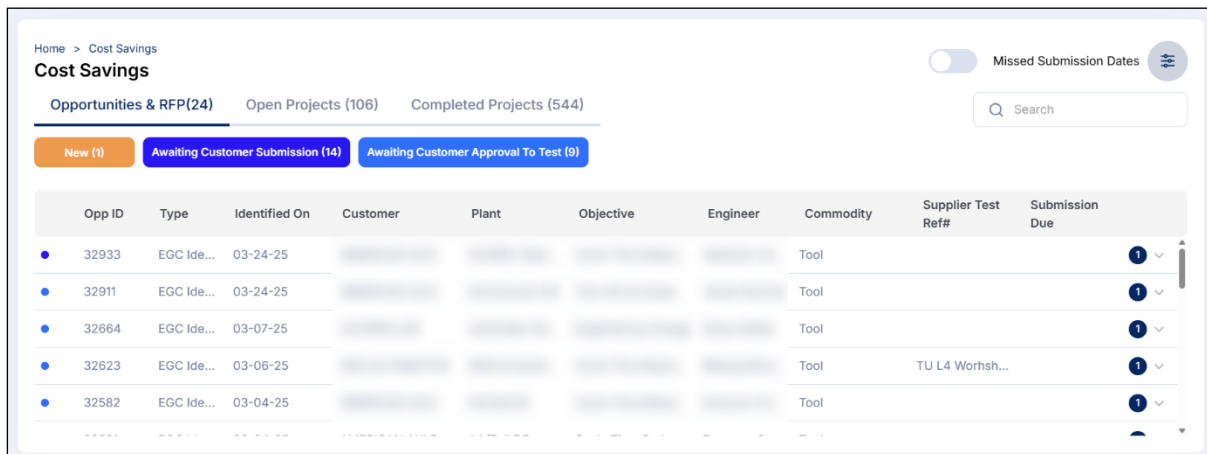
The supplier for whom the plant is enabled can perform any one of the following on the RFP:

- **Save as Draft**
- **Submit to EGC**

To submit to EGC, follow the instructions:

1. In the main menu, click **Cost Savings**. The Cost Savings screen is displayed.

Figure 100: Cost Savings



Home > Cost Savings

**Cost Savings**

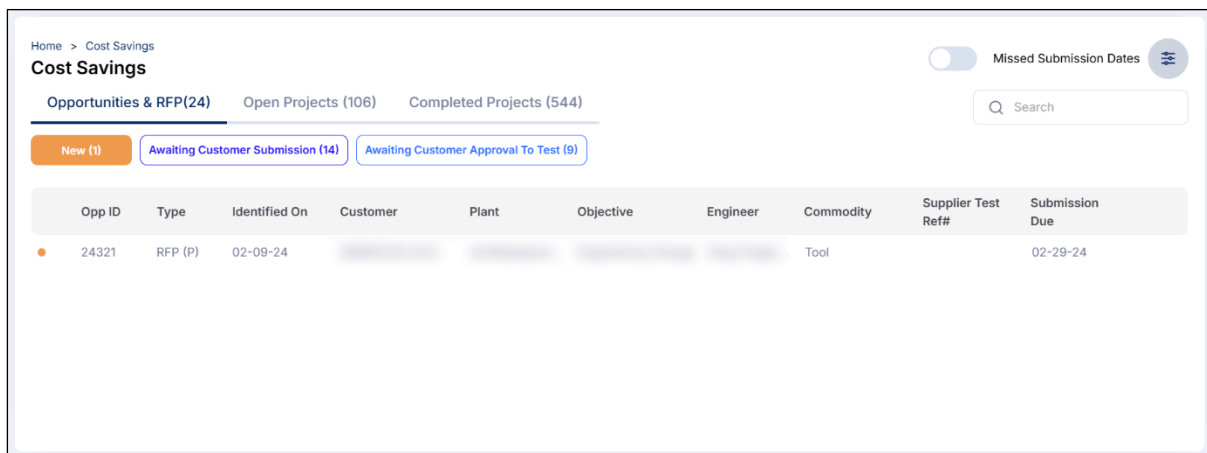
Opportunities & RFP(24) Open Projects (106) Completed Projects (544)

New (1) Awaiting Customer Submission (14) Awaiting Customer Approval To Test (9)

Op ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#	Submission Due
32933	EGC Ide...	03-24-25					Tool		
32911	EGC Ide...	03-24-25					Tool		
32664	EGC Ide...	03-07-25					Tool		
32623	EGC Ide...	03-06-25					Tool	TU L4 Worksh...	
32582	EGC Ide...	03-04-25					Tool		

2. In the **Opportunities & RFPs** tab, click **New** to list the new RFPs shared by the EGC user.

Figure 101: Opportunities and RFPs – New



Home > Cost Savings

**Cost Savings**

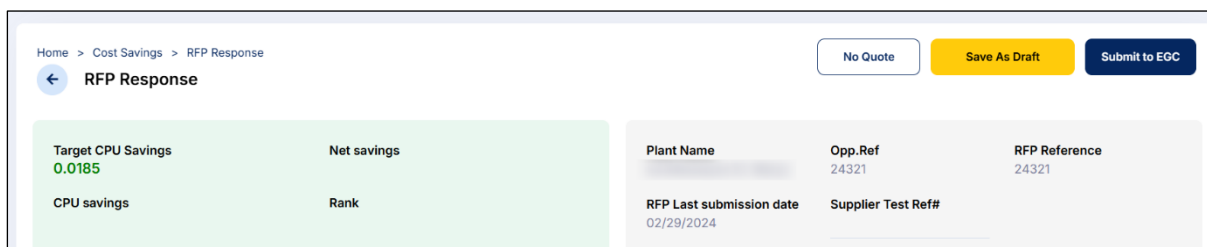
Opportunities & RFP(24) Open Projects (106) Completed Projects (544)

New (1) Awaiting Customer Submission (14) Awaiting Customer Approval To Test (9)

Op ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#	Submission Due
24321	RFP (P)	02-09-24					Tool		02-29-24

3. Click a specific RFP from the grid/list to view the details.

Figure 102: New RFP Response



Home > Cost Savings > RFP Response

RFP Response

No Quote Save As Draft Submit to EGC

Target CPU Savings 0.0185	Net savings	Plant Name	Opp.Ref 24321	RFP Reference 24321
CPU savings	Rank	RFP Last submission date 02/29/2024	Supplier Test Ref#	

4. In the RFP Response, do the following:

- Savings details: The savings details are automatically populated based on the values entered by the supplier.
  - **Target CPU Savings**
  - **Net Savings**
  - **CPU Savings**
- Plant details: The plant details can be viewed by the supplier.

- **Plant Name**
- **Opp. Ref**
- **RFP Reference**
- **RFP Last submission date:** the RFP is automatically changed to No Quote status after this date.
- **Supplier Test Ref #:** Supplier should enter the reference number.
- The current details are displayed; the supplier should enter/select the proposed details for the following:
  - **Item details**
  - **POU (Point of Use) and Product Info**
  - **Operation and Cycle time**
  - **Production and Machine setup**
  - **Coolant Information**
  - **Cost Analysis (Per year)**
  - **Savings (Per year)**
  - **Others**
- **Supplier Attachment:** The supplier can attach supporting documents.
- **EGC Attachment:** The attachments attached by the EGC are listed.

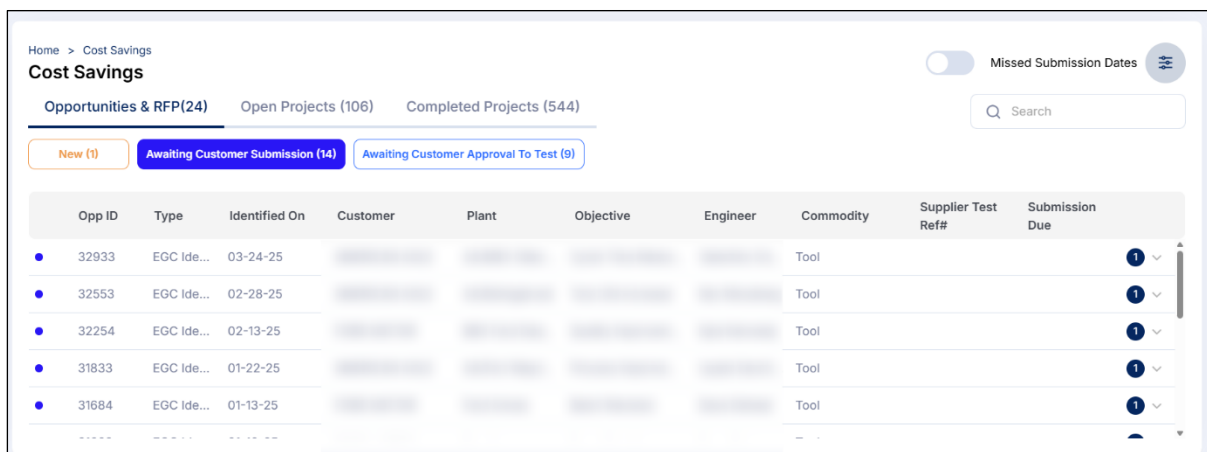
5. Click **Submit to EGC** to submit the proposal.

## 7.1.2 Awaiting Customer Submission

The proposal that has been created and waiting for the customer submission are categorised in the Awaiting Customer Submission status of the Opportunities and RFPs.

Click the **Awaiting Customer Submission** button in the **Opportunities and RFPs** tab to display the projects which are awaiting customer submission.

Figure 103: Opportunities and RFPs – Awaiting Customer Submission



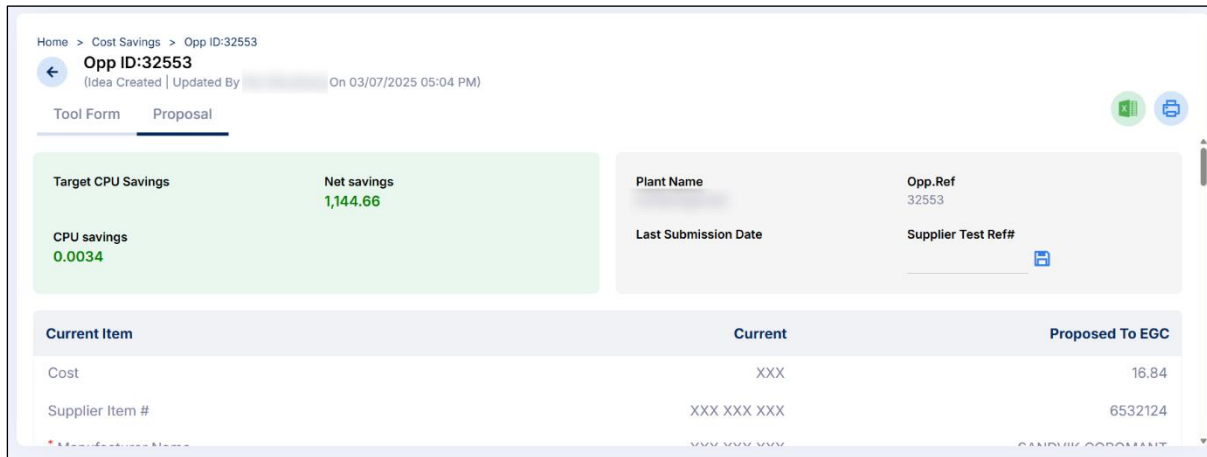
The screenshot shows the 'Cost Savings' section of the EGC Supplier Plus interface. The 'Opportunities & RFP(24)' tab is selected, and the 'Awaiting Customer Submission (14)' button is highlighted. A table displays the following data:

Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#	Submission Due
32933	EGC Ide...	03-24-25					Tool		
32553	EGC Ide...	02-28-25					Tool		
32254	EGC Ide...	02-13-25					Tool		
31833	EGC Ide...	01-22-25					Tool		
31684	EGC Ide...	01-13-25					Tool		



Click on any specific project to view the details.

Figure 104: Awaiting Customer Submission Details



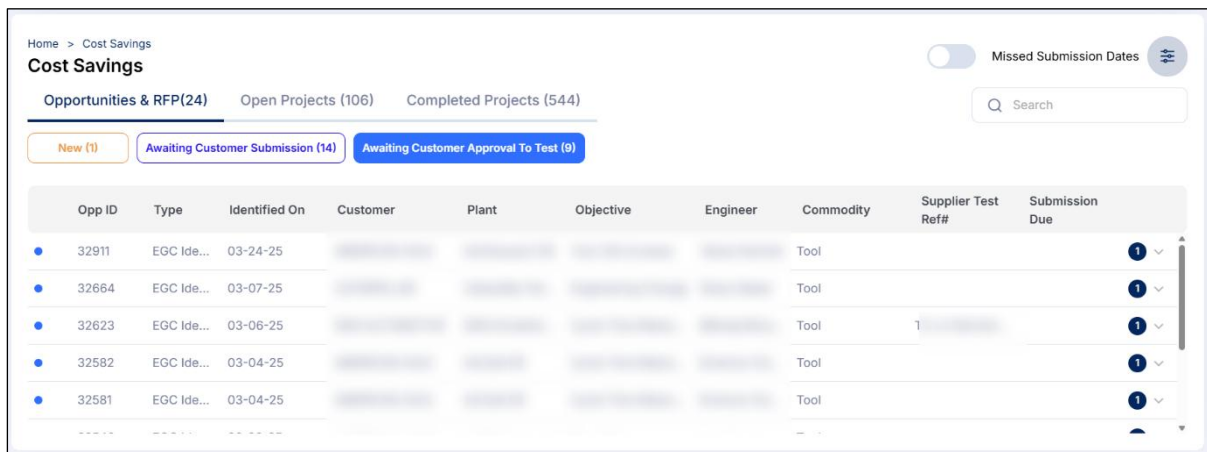
Current Item	Current	Proposed To EGC
Cost	XXX	16.84
Supplier Item #	XXX XXX XXX	6532124

### 7.1.3 Awaiting Customer Approval to Test

The proposals that were submitted and are waiting for the approval of the End Customer to be tested are categorised in the Awaiting Customer Approval to Test status of the Opportunities and RFPs.

Click the **Awaiting Customer Approval to Test** button in the **Opportunities and RFPs** tab to display the projects which are awaiting customer approval for testing.

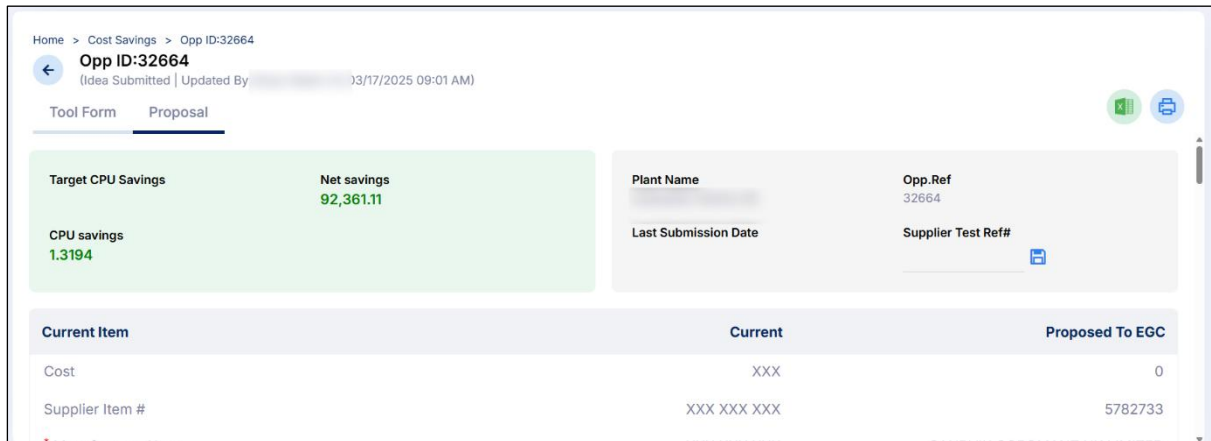
Figure 105: Opportunities and RFPs - Awaiting Customer Approval to Test



Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#	Submission Due
32911	EGC Ide...	03-24-25					Tool		1
32664	EGC Ide...	03-07-25					Tool		1
32623	EGC Ide...	03-06-25					Tool	1	1
32582	EGC Ide...	03-04-25					Tool		1
32581	EGC Ide...	03-04-25					Tool		1

Click on any specific project to view the details.

Figure 106: Awaiting Customer Approval to Test Details



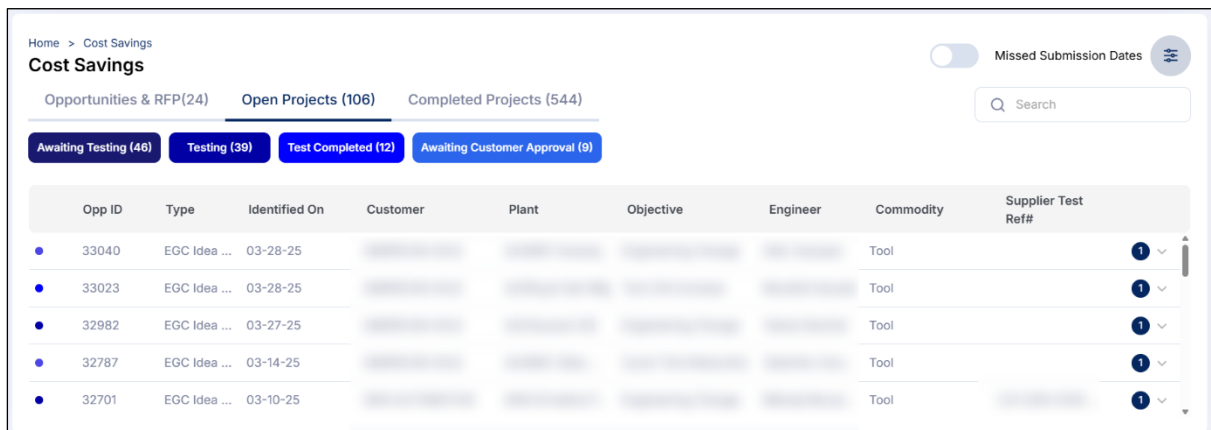
## 7.2 Open Projects

Open projects are opportunities or RFPs responded to by the supplier as a proposal. The Phases in which the idea is termed as open has been approved by the end customer to test.

The phases which are termed as open projects are:

- Idea Submitted
- Testing
- Testing Completed
- Awaiting Customer Approval

Figure 107: Open Projects



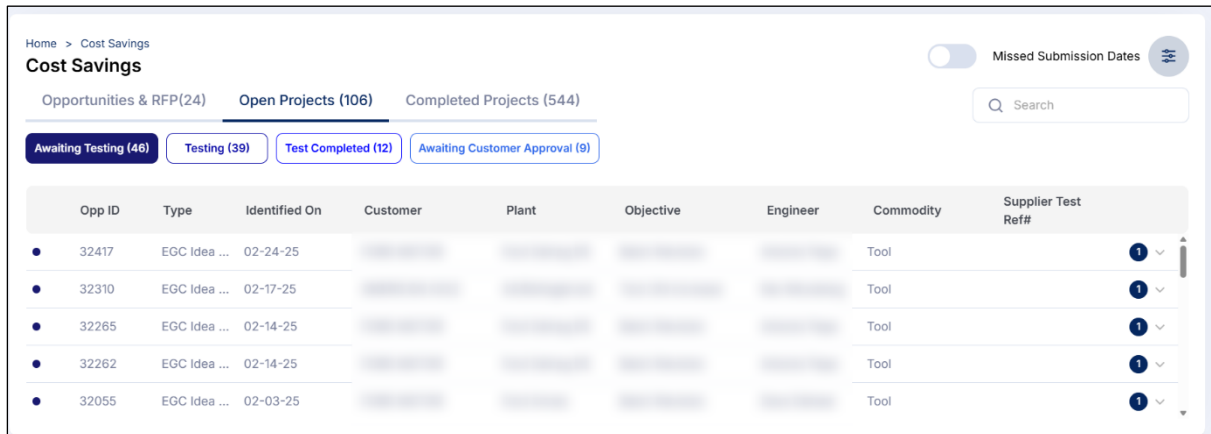
Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#
33040	EGC Idea ...	03-28-25	[redacted]	[redacted]	[redacted]	[redacted]	Tool	[redacted]
33023	EGC Idea ...	03-28-25	[redacted]	[redacted]	[redacted]	[redacted]	Tool	[redacted]
32982	EGC Idea ...	03-27-25	[redacted]	[redacted]	[redacted]	[redacted]	Tool	[redacted]
32787	EGC Idea ...	03-14-25	[redacted]	[redacted]	[redacted]	[redacted]	Tool	[redacted]
32701	EGC Idea ...	03-10-25	[redacted]	[redacted]	[redacted]	[redacted]	Tool	[redacted]

### 7.2.1 Awaiting Testing

The proposals that were accepted and are waiting to be tested are listed in the Awaiting testing status.

Click the **Awaiting Testing** button in the **Open Projects** tab to display the projects which are awaiting the testing process.

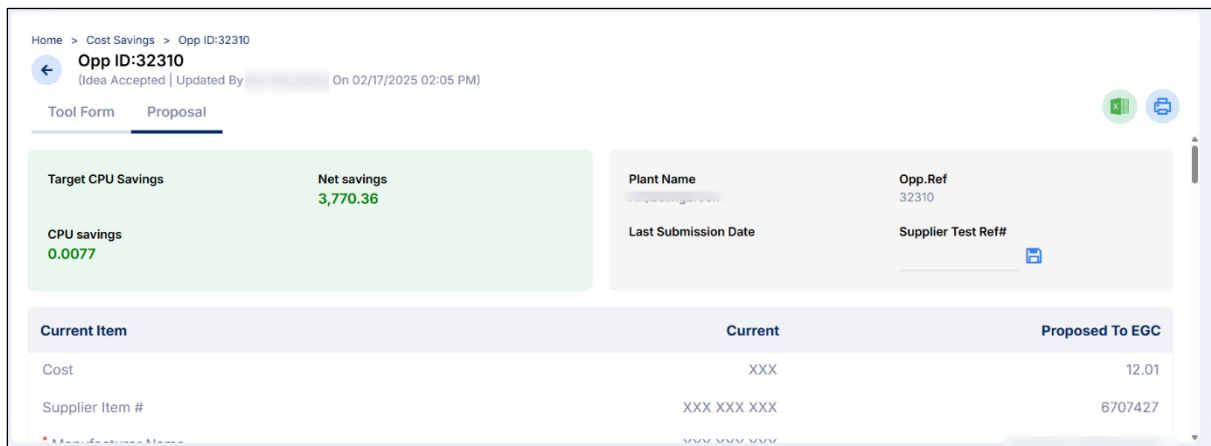
Figure 108: Open Projects - Awaiting Testing



Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#
32417	EGC Idea ...	02-24-25					Tool	1
32310	EGC Idea ...	02-17-25					Tool	1
32265	EGC Idea ...	02-14-25					Tool	1
32262	EGC Idea ...	02-14-25					Tool	1
32055	EGC Idea ...	02-03-25					Tool	1

Click on any specific project to view the details.

Figure 109: Awaiting Testing Details



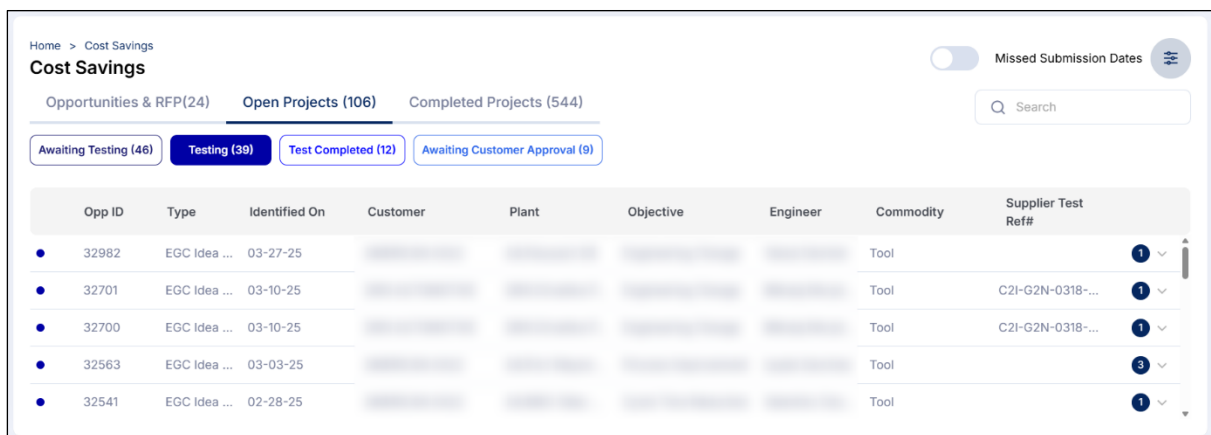
Current Item	Current	Proposed To EGC
Cost	XXX	12.01
Supplier Item #	XXX XXX XXX	6707427

## 7.2.2 Testing

The proposals that are being tested are listed as testing status.

Click the **Testing** button in the **Open Projects** tab to display the projects which are being tested.

Figure 110: Open Projects - Testing



Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#
32982	EGC Idea ...	03-27-25					Tool	1
32701	EGC Idea ...	03-10-25					Tool	C2I-G2N-0318-...
32700	EGC Idea ...	03-10-25					Tool	C2I-G2N-0318-...
32563	EGC Idea ...	03-03-25					Tool	3
32541	EGC Idea ...	02-28-25					Tool	1

Click on any specific project to view the details.

Figure 111: Testing Details

Home > Cost Savings > Opp ID:32701

Opp ID:32701  
(Testing | Updated By [redacted] 03/10/2025 04:48 AM)

Tool Form Proposal

Target CPU Savings
Net savings  
**903.23**

CPU savings  
**0.0363**

Plant Name
Opp.Ref  
32701

RFP Last submission date
Supplier Test Ref#  
[redacted]

Current Item	Current	Proposed By Supplier	Actuals To EGC
Cost	XXX	18.82	
Supplier Item #	XXX XXX XXX	8194296	8194296

## 7.2.3 Testing Completed

The proposals for which testing is completed are listed in the testing completed status.

Click the **Testing Completed** button in the **Open Projects** tab to display the projects in which testing is completed.

Figure 112: Open Projects – Testing Completed

Home > Cost Savings

Cost Savings

☐ Missed Submission Dates

Opportunities & RFP(24) Open Projects (106) Completed Projects (544)

Awaiting Testing (46) Testing (39) **Test Completed (12)** Awaiting Customer Approval (9)

Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#
33023	EGC Idea ...	03-28-25	[redacted]	[redacted]	[redacted]	[redacted]	Tool	1
31745	EGC Idea ...	01-16-25	[redacted]	[redacted]	[redacted]	[redacted]	Tool	2
31420	EGC Idea ...	12-16-24	[redacted]	[redacted]	[redacted]	[redacted]	Tool	1
31321	EGC Idea ...	12-05-24	[redacted]	[redacted]	[redacted]	[redacted]	Tool	1
30145	EGC Idea ...	09-05-24	[redacted]	[redacted]	[redacted]	[redacted]	Tool	1

Click on any specific project to view the details.

Figure 113: Testing Completed Details

Home > Cost Savings > Opp ID:31745

Opp ID:31745  
(Testing Completed | Updated By [redacted] On 02/04/2025 03:29 PM)

Tool Form Proposal

Target CPU Savings
Net savings  
**1,644.76**

CPU savings  
**0.3514**

Plant Name
Opp.Ref  
31745

RFP Last submission date
Supplier Test Ref#  
[redacted]

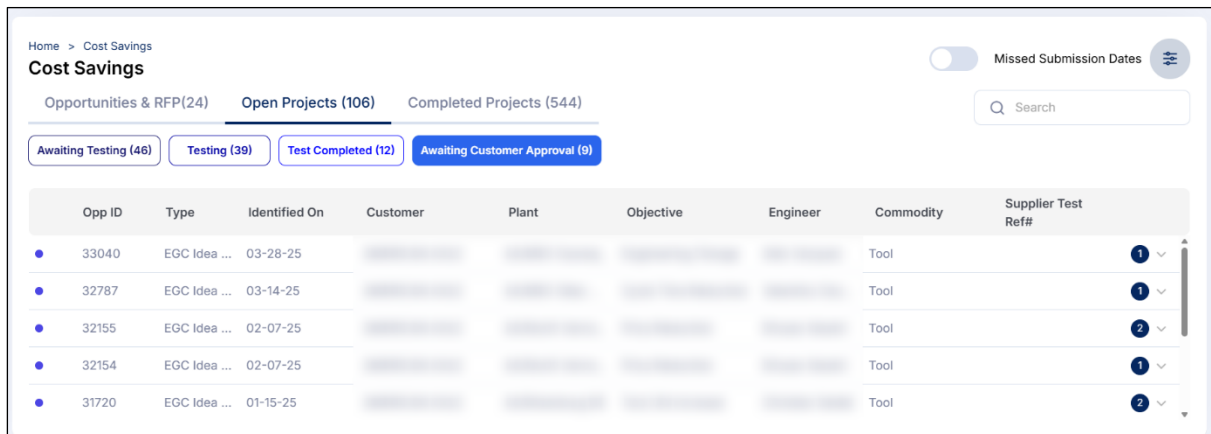
Current Item	Current	Proposed By Supplier	Actuals To EGC
Cost	XXX	7.46	7.46
Supplier Item #	XXX XXX XXX	5756561	5756561

## 7.2.4 Awaiting Customer Approval

The proposals that were tested, the savings that were submitted and are waiting for the approval of the customer are listed in the awaiting customer approval status.

Click the **Awaiting Customer Approval** button in the **Open Projects** tab to display the projects which are waiting the approval of the customer.

Figure 114: Open Projects - Awaiting Customer Approval



Home > Cost Savings

**Cost Savings**

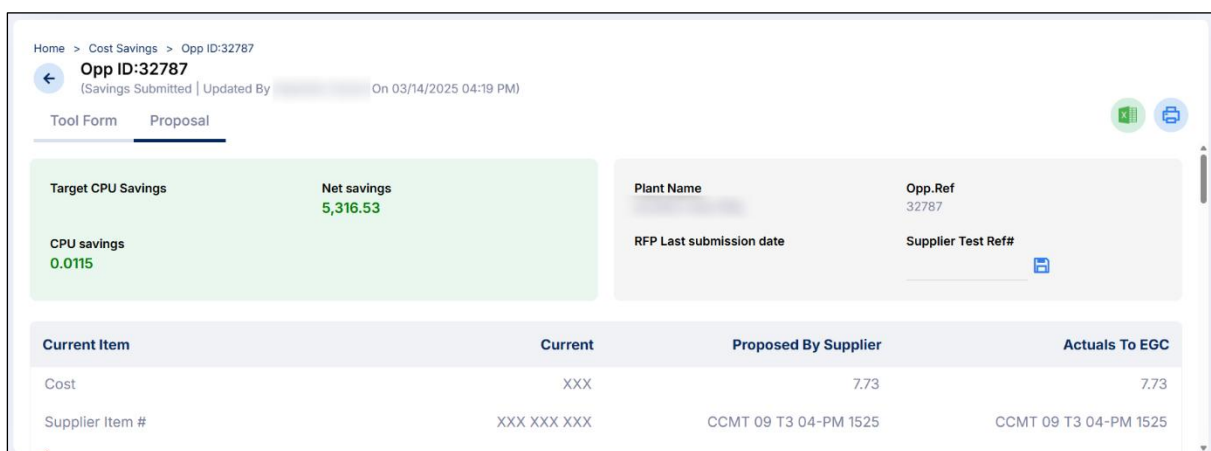
Opportunities & RFP(24) **Open Projects (106)** Completed Projects (544)

Awaiting Testing (46) Testing (39) Test Completed (12) **Awaiting Customer Approval (9)**

Op ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#
33040	EGC Idea ...	03-28-25					Tool	1
32787	EGC Idea ...	03-14-25					Tool	1
32155	EGC Idea ...	02-07-25					Tool	2
32154	EGC Idea ...	02-07-25					Tool	1
31720	EGC Idea ...	01-15-25					Tool	2

Click on any specific project to view the details.

Figure 115: Awaiting Customer Approval Details



Home > Cost Savings > Opp ID:32787

**Opp ID:32787**  
(Savings Submitted | Updated By | On 03/14/2025 04:19 PM)

Tool Form **Proposal**

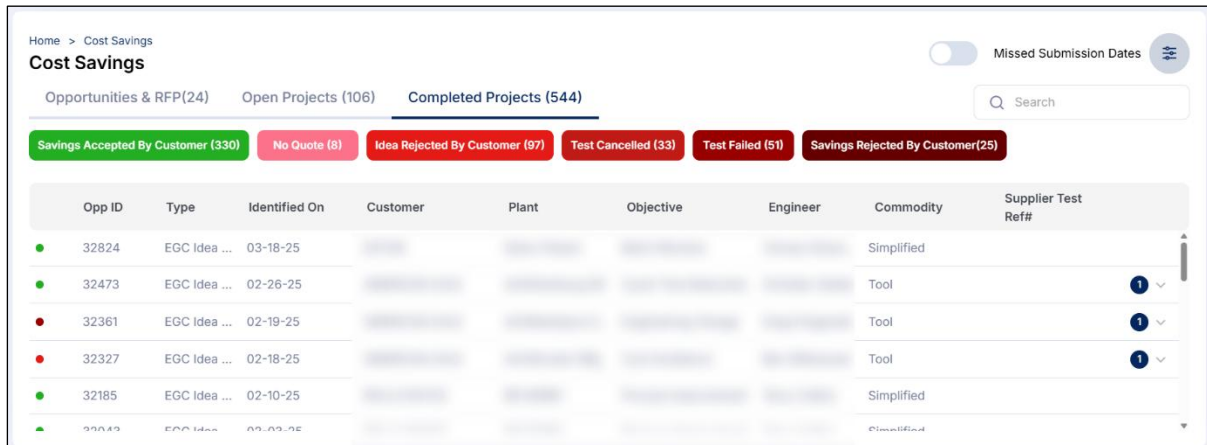
Target CPU Savings	Net savings <b>5,316.53</b>	Plant Name	Opp.Ref 32787
CPU savings <b>0.0115</b>		RFP Last submission date	Supplier Test Ref#

Current Item	Current	Proposed By Supplier	Actuals To EGC
Cost	XXX	7.73	7.73
Supplier Item #	XXX XXX XXX	CCMT 09 T3 04-PM 1525	CCMT 09 T3 04-PM 1525

## 7.3 Completed Projects

The Projects that are no longer in process are termed as completed projects. These projects may be projects that were rejected as no quote, projects that were rejected at any time during testing, or if the proposal was rejected by the customer because of lack of CPU savings or ROI (Return on Investment).

Figure 116: Completed Projects



Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#
32824	EGC Idea ...	03-18-25					Simplified	
32473	EGC Idea ...	02-26-25					Tool	1
32361	EGC Idea ...	02-19-25					Tool	1
32327	EGC Idea ...	02-18-25					Tool	1
32185	EGC Idea ...	02-10-25					Simplified	
32043	EGC Idea ...	02-03-25					Simplified	

### 7.3.1 No Quote

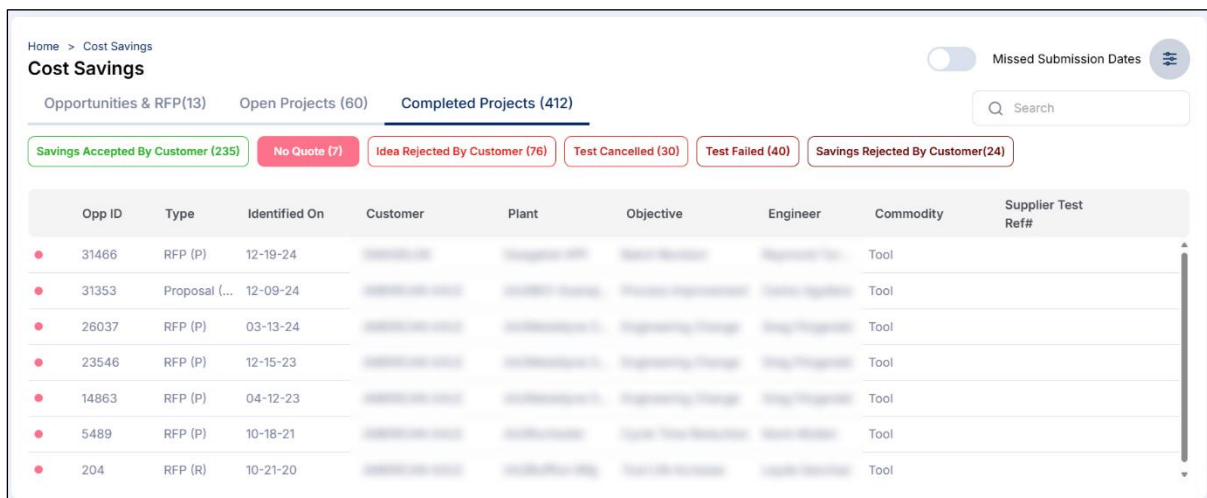
All opportunities that the Supplier User choose not to proceed forward are listed as No Quote projects. The Supplier Partner should enter a reason for not proceeding with the opportunity. The opportunity is set to No Quote if the Supplier User missed the submission date. The submission date by default is 30 days from the date of sending the RFP. The EGC user can edit the last submission date.

The opportunity is moved from **New** status in **Opportunities and RFPs** to **No Quote** status in **Completed Projects**.

Once the opportunities are marked as No Quote, the Supplier User not the EGC personnel can proceed with the opportunity for this specific supplier.

Click the **No Quote** button in the **Completed Projects** tab to display the projects whose status is No Quote.

Figure 117: Completed Projects – No Quote



Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#
31466	RFP (P)	12-19-24					Tool	
31353	Proposal (...)	12-09-24					Tool	
26037	RFP (P)	03-13-24					Tool	
23546	RFP (P)	12-15-23					Tool	
14863	RFP (P)	04-12-23					Tool	
5489	RFP (P)	10-18-21					Tool	
204	RFP (R)	10-21-20					Tool	

Click on any specific project to view the details. The **Reason For No Quote** can be viewed with the other details of the RFP.

Figure 118: No Quote - RFP

Home > Cost Savings > RFP Response

RFP Response

Reason For No Quote  
System Updated Due To Past Submission Date

Target CPU Savings  
0.0015

Net savings

CPU savings

Rank

Plant Name

Opp.Ref  
31466

RFP Reference  
31466

RFP Last submission date  
02/03/2025

Supplier Test Ref#

Current Item	Current	Proposal To EGC
Cost	XXX	
Supplier Name	XXX XXX XXX	

### 7.3.2 Proposal Rejected By Customer

The proposal can be rejected by the End Customer during any stage of testing if they are not satisfied with the test results. The proposals that were rejected by the End Customer are listed in the Proposal Rejected by Customer status in the Completed Projects tab.

Click the **Idea Rejected By Customer** button in the **Completed Projects** tab to display the projects whose idea was rejected by the customer.

Figure 119: Completed Projects – Idea Rejected By Customer

Home > Cost Savings

Cost Savings

Missed Submission Dates

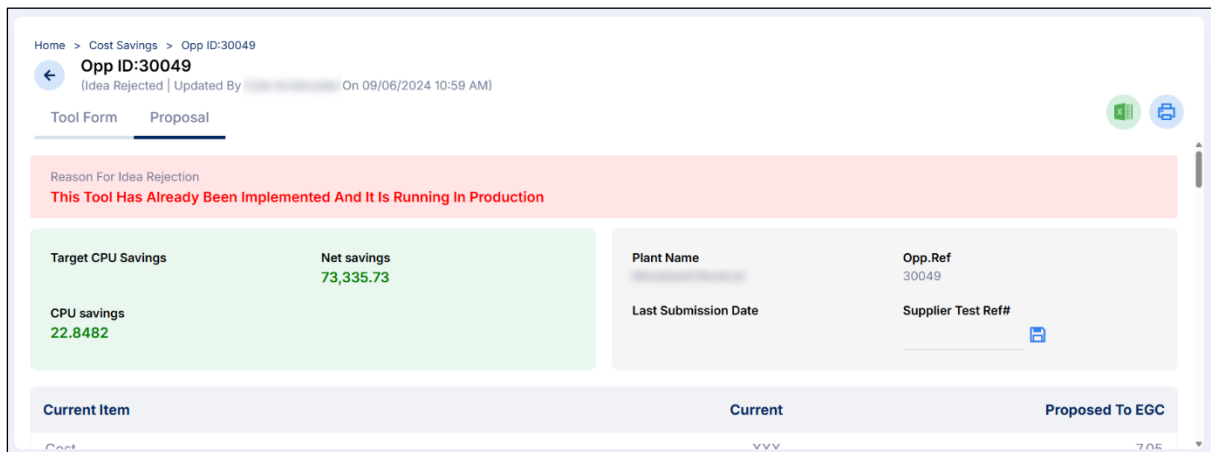
Opportunities & RFP(24) Open Projects (107) Completed Projects (543)

Savings Accepted By Customer (329) No Quote (8) Idea Rejected By Customer (97) Test Cancelled (33) Test Failed (51) Savings Rejected By Customer(25)

	Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#	
	32327	EGC Idea ...	02-18-25					Tool		1
	30049	EGC Idea ...	08-27-24					Tool		1
	29885	EGC Idea ...	08-14-24					Tool		1
	28044	EGC Idea ...	06-26-24					Tool		1
	28043	EGC Idea ...	06-26-24					Tool		1

Click on any specific project to view the details.

Figure 120: Idea Rejected By Customer - Details

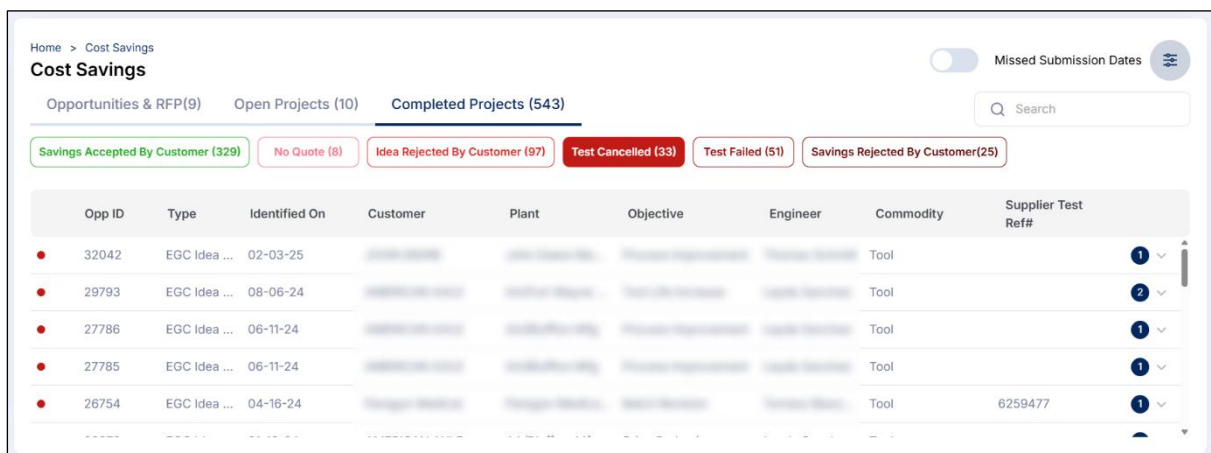


### 7.3.3 Test Cancelled

The testing of the proposal proposed can be cancelled at any point of time if the End Customer is not satisfied. These cancelled proposals are listed in the Test Cancelled status of the Completed Projects.

Click the **Test Cancelled** button in the **Completed Projects** tab to display the projects whose test is cancelled.

Figure 121: Completed Projects – Test Cancelled

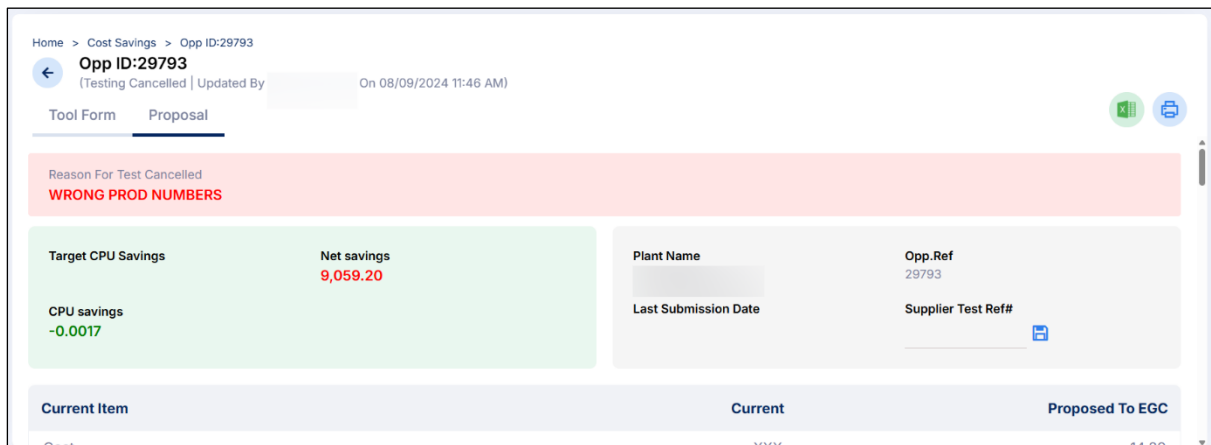


Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#
32042	EGC Idea ...	02-03-25	[redacted]	[redacted]	[redacted]	[redacted]	Tool	[redacted]
29793	EGC Idea ...	08-06-24	[redacted]	[redacted]	[redacted]	[redacted]	Tool	[redacted]
27786	EGC Idea ...	06-11-24	[redacted]	[redacted]	[redacted]	[redacted]	Tool	[redacted]
27785	EGC Idea ...	06-11-24	[redacted]	[redacted]	[redacted]	[redacted]	Tool	[redacted]
26754	EGC Idea ...	04-16-24	[redacted]	[redacted]	[redacted]	[redacted]	Tool	6259477

Click on any specific project to view the details.



Figure 122: Testing Cancelled details

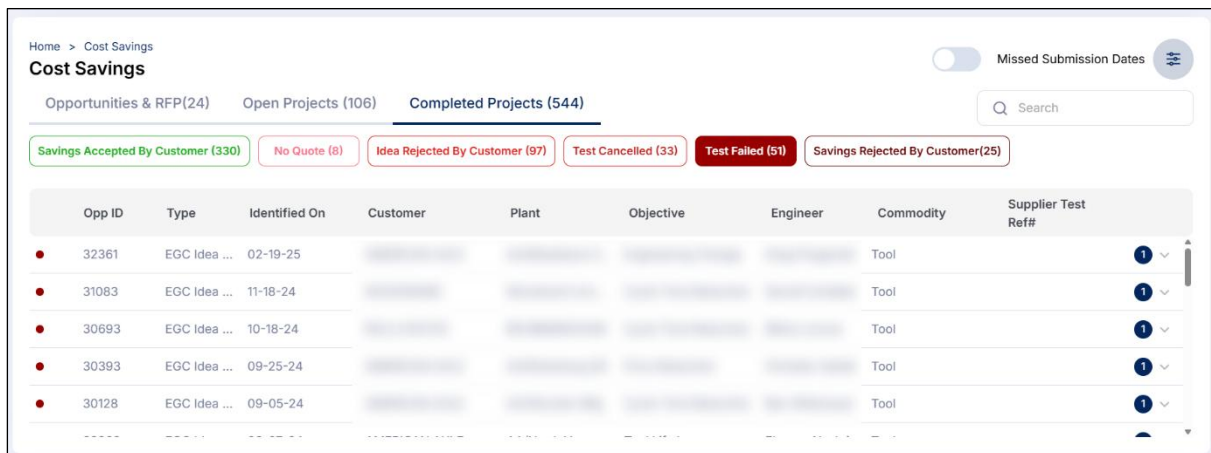


### 7.3.4 Test Failed

The proposals that failed achieving the desired result during the testing period are listed in the testing failed status of the Completed Projects.

Click the **Test Failed** button in the **Completed Projects** tab to display the projects in which the test failed.

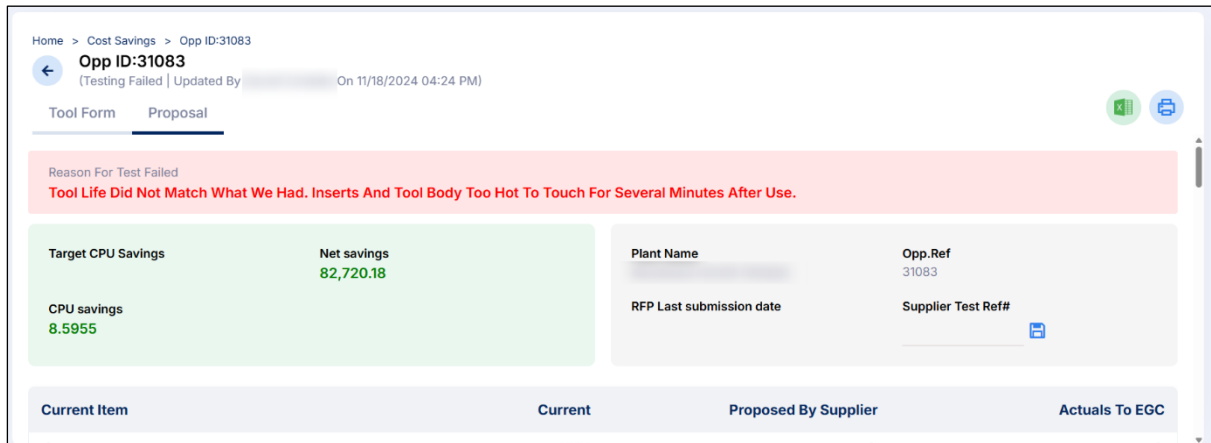
Figure 123: Completed Projects – Test Failed



Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#
32361	EGC Idea ...	02-19-25					Tool	1
31083	EGC Idea ...	11-18-24					Tool	1
30693	EGC Idea ...	10-18-24					Tool	1
30393	EGC Idea ...	09-25-24					Tool	1
30128	EGC Idea ...	09-05-24					Tool	1

Click on any specific project to view the details.

Figure 124: Test Failed

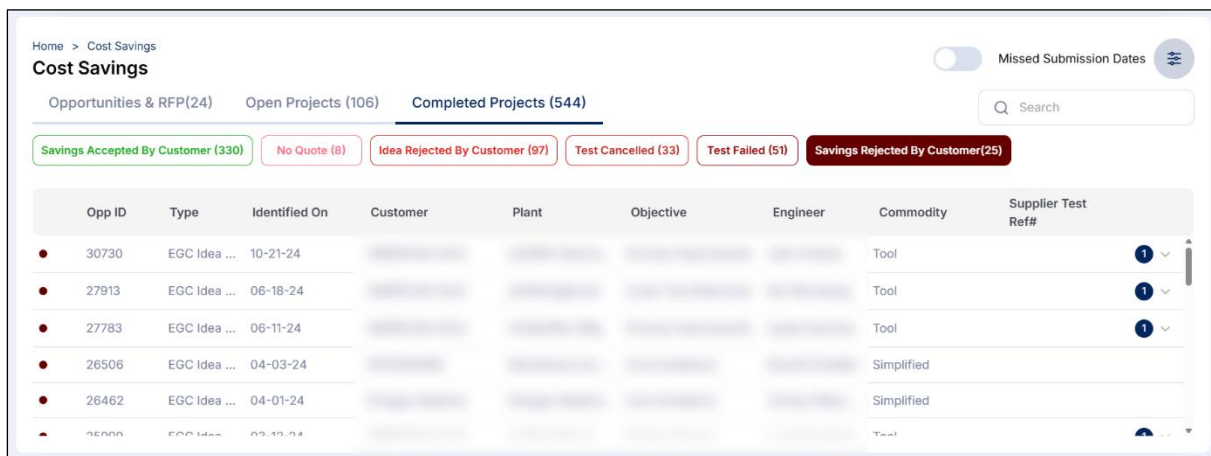


### 7.3.5 Savings Rejected By Customer

The proposal which passed the testing phase will be verified by the End Customer, the End Customer may reject the idea if they are not satisfied with the savings achievement. These ideas are listed in the Savings rejected by customer status in the completed projects.

Click the **Savings Rejected By Customer** button in the **Completed Projects** tab to display the projects which are rejected by the customer.

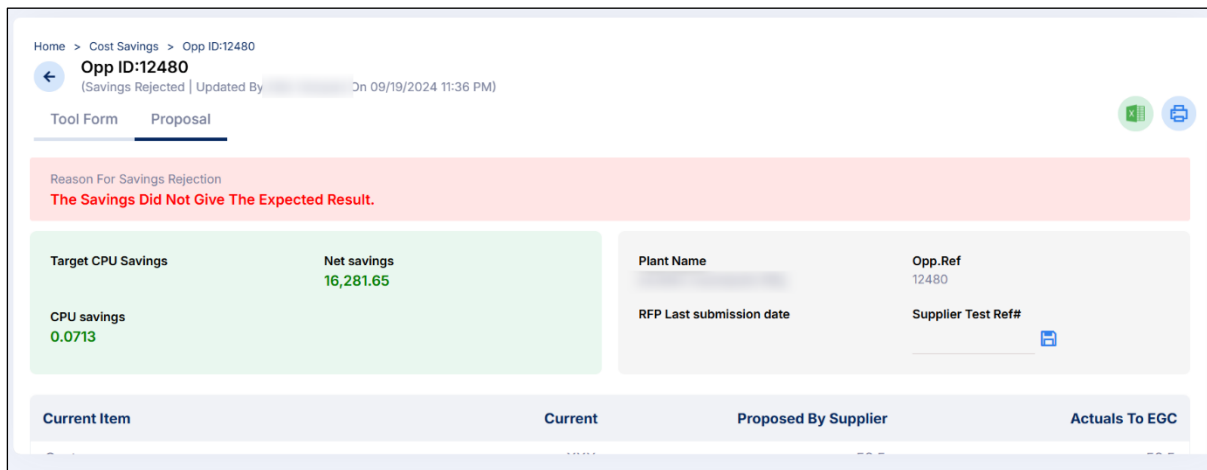
Figure 125: Completed Projects – Savings Rejected By Customer



Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#
30730	EGC Idea ...	10-21-24					Tool	1
27913	EGC Idea ...	06-18-24					Tool	1
27783	EGC Idea ...	06-11-24					Tool	1
26506	EGC Idea ...	04-03-24					Simplified	
26462	EGC Idea ...	04-01-24					Simplified	
26000	EGC Idea ...	03-13-24					Tool	

Click on any specific project to view the details.

Figure 126: Savings Rejected By Customer



Home > Cost Savings > Opp ID:12480

**Opp ID:12480**  
(Savings Rejected | Updated By [redacted] On 09/19/2024 11:36 PM)

Tool Form **Proposal**

Reason For Savings Rejection  
**The Savings Did Not Give The Expected Result.**

Target CPU Savings	Net savings <b>16,281.65</b>	Plant Name	Opp.Ref 12480
CPU savings <b>0.0713</b>		RFP Last submission date	Supplier Test Ref#

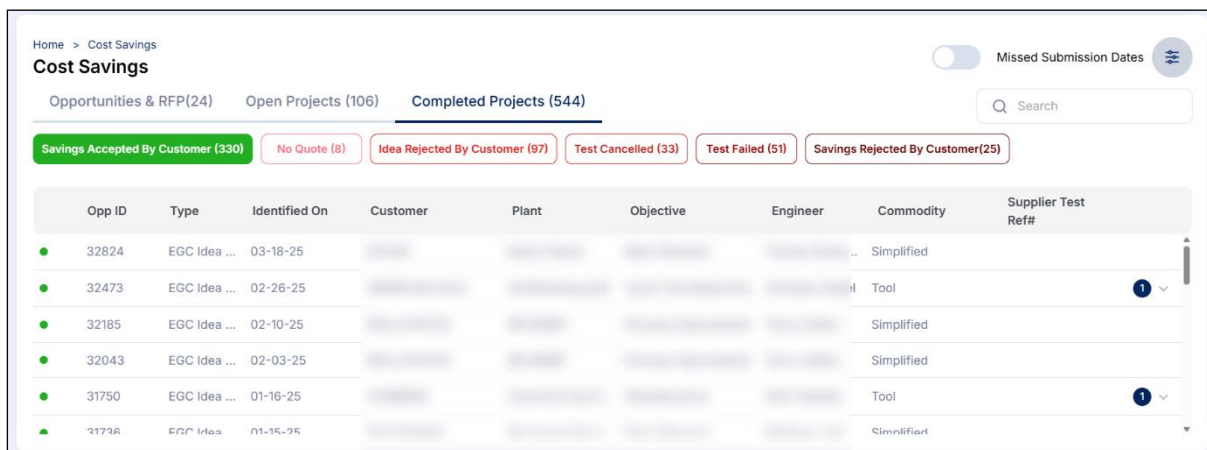
Current Item	Current	Proposed By Supplier	Actuals To EGC

### 7.3.6 Savings Accepted By Customer

The proposal which passed the testing phase will be verified by the End Customer. The End Customer will accept the idea if they are satisfied with the savings that were proposed. These proposals are listed in the Savings accepted by customer status in the completed projects.

Click the **Savings Accepted By Customer** button in the **Completed Projects** tab to display the projects whose savings are accepted by the End Customer.

Figure 127: Completed Projects – Savings Accepted By Customer



Home > Cost Savings

**Cost Savings**

Opportunities & RFP(24) Open Projects (106) **Completed Projects (544)**

**Savings Accepted By Customer (330)** No Quote (8) Idea Rejected By Customer (97) Test Cancelled (33) Test Failed (51) Savings Rejected By Customer(25)

Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#
32824	EGC Idea ...	03-18-25					Simplified	
32473	EGC Idea ...	02-26-25					Tool	1
32185	EGC Idea ...	02-10-25					Simplified	
32043	EGC Idea ...	02-03-25					Simplified	
31750	EGC Idea ...	01-16-25					Tool	1
31736	EGC Idea ...	01-15-25					Simplified	

Click on any specific project to view the details.

Figure 128: Savings Accepted By Customer

Home > Cost Savings > Opp ID:32473

←

Opp ID:32473

(Savings Accepted | Updated By [redacted] On 03/27/2025 06:49 AM)

Tool Form

Proposal

Target CPU Savings

Net savings

3,175.80

CPU savings

0.0527

Plant Name

Opp.Ref

32473

RFP Last submission date

Supplier Test Ref#

Current Item	Current	Proposed By Supplier	Actuals To EGC
Cost	XXX	17.45	17.45
Supplier Item #	XXX XXX XXX	8290274	8290274

## 8. Broadcast

Broadcasting is essential for effective communication, categorized into two key types: announcements and product obsolescence. Announcements ensure timely dissemination of important information, keeping your audience informed and engaged. Meanwhile, product obsolescence broadcasts highlight the transition of products, helping End Customers stay updated on the obsolescence products and their replacements.

### 8.1 Announcements

Announcements are formal notifications or messages typically sent to a specific audience to share an important update or notification that is deemed important for them to know.

Announcements screen allows the targeted audience to view announcements, ensuring that everyone stays updated on crucial information such as updates, releases, and other important notifications. This module ensures the fact that no detail goes unnoticed.

**To view the announcement list, follow the instructions:**

1. Login to the application.
2. In the main menu, click Broadcast, the Announcements and Product Obsolescence are displayed.

Figure 129: Main Menu- Broadcast

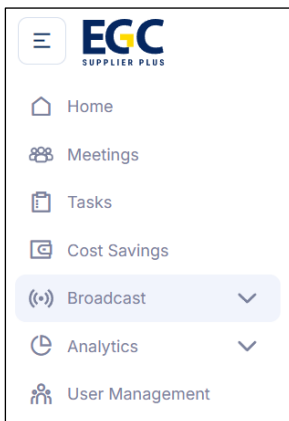
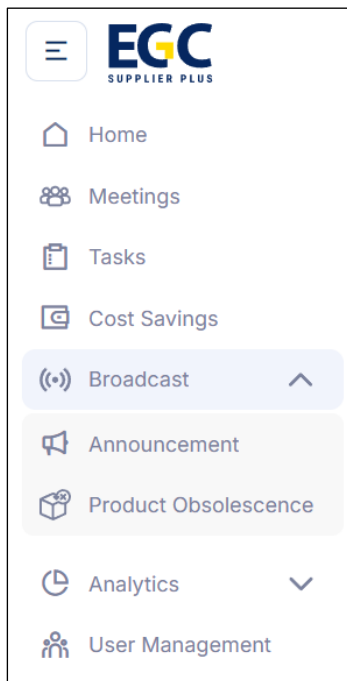


Figure 130: Announcement



3. Click the announcement icon to view the list of announcements.

Figure 131: Announcements

Home > Broadcast > Announcements

**Announcements** New Announcement

In Progress (2) Completed (5)

S/N	Title	Created By	Publisher	Published On	Audience
1134					0
1133					2
1059	Supplier Plus: Supplier Plus User Guide (New and Existing Users)	Thomas Henry	Thomas Henry	01-Oct-24	197
1058	Supplier Plus: New Supplier Product Highlights	Thomas Henry	Thomas Henry	19-Sep-24	197
1020	Supplier Plus: Supplier Plus User Guide	John Hocking	John Hocking	28-Nov-23	171
16	Supplier Plus: Supplier Plus User Guide	John Hocking	John Hocking	30-Oct-23	150
15	New Supplier Plus User Guide (New and Existing Users)	John Hocking	John Hocking	25-Oct-23	88

### 8.1.1 New Announcement

The new announcement can be created and sent to a specific audience.

**To create a new announcement, follow the instructions:**

1. In the Announcement screen, click the **New Announcement** button. The create new announcement screen is displayed.

Figure 132: New announcement – message body

2. On the screen, do the following:

- Enter the **Title** for the announcement.
- Enter the **Message** for the announcement.
- Click **New Attachment**, a popup is displayed to browse an attachment.



*All fields are mandatory*

3. Click **Next** to select the audience for the new announcement. The **Select Audience** tab is displayed.



*Click **Save as Draft** to save the partial announcement to complete and publish it later.*

Figure 133: New announcement – Audience

4. On the **Select Audience** tab, do the following:

- Enable the locations listed in the **Select Locations**.



*The search bar enables to easily search for specific locations.  
The locations are displayed based on the preferences set for the logged in user.*

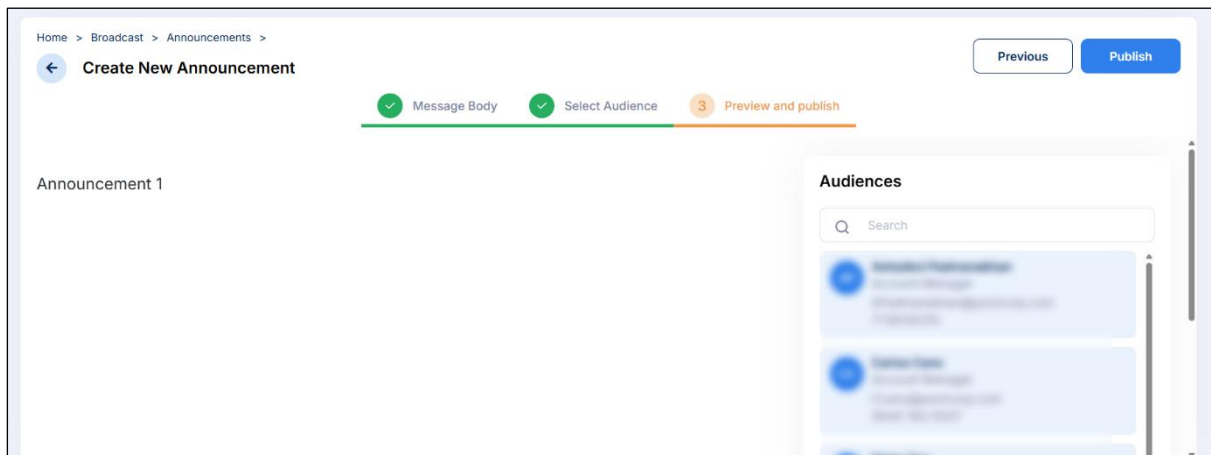
- Enable **Corporate Contacts**
- Enable **Site Level Contacts**
- Search **Audience (EGC Users)** using the Search bar.

5. Click **Preview** to preview the Announcement, the **Preview and Publish** tab is displayed.



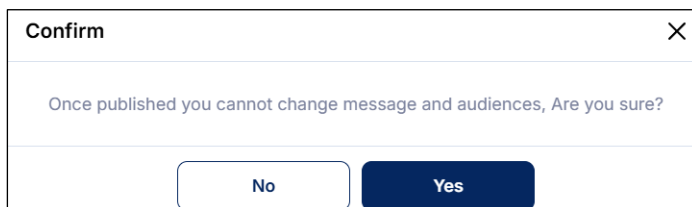
Click **Save as Draft** to save the announcement and publish it later.  
Click **Previous** to go back to the Message Body tab

Figure 134: New announcement – Preview and Publish



6. View the announcement and click **Publish** to publish the announcement. A confirmation popup is displayed.

Figure 135: New announcement – Confirm



7. Click **Yes** to publish the announcement. The audience will receive the announcement email, and the announcement will be updated in the announcement list.

## 8.1.2 View a Completed Announcement

To view a completed announcement, follow the instructions:

1. In the announcements screen, enable the **Completed** button above the grid. The completed announcements are displayed in the grid.



Figure 136: Completed Announcement

S/N	Title	Created By	Publisher	Published On	Audience
1059	Launch Day - CoroPhab 24.2 Latest Cutting Tool and Solutions from Sandvik	Thomas Henry	Thomas Henry	01-Oct-24	197
1058	CoroPhab 24.2 New Release Product Highlights	Thomas Henry	Thomas Henry	19-Sep-24	197
1020	Sandvik Coated Tools	John Hocking	John Hocking	28-Nov-23	171
16	Sandvik Coated Tools and Solutions	John Hocking	John Hocking	30-Oct-23	150
15	How cutting tools in condition determine the output	John Hocking	John Hocking	25-Oct-23	88

- Click on a specific record in the grid to open the announcement.

Figure 137: View announcement

Home > Broadcast > Announcements > Launch Day - CoroPhab 24.2 Latest Cutting Tool and Solutions from Sandvik

**S/N# 1059 (Published)**  
(Published by [Name] On 01-Oct-24 09:02 AM)

Message Body Select Audience Preview and publish

**Launch Day - CoroPhab 24.2 Latest Cutting Tool and Solutions from Sandvik (Comment)**

Welcome to the 4th month of our latest cutting tool innovations. From the industry leading cutting and grinding solutions, CoroPhab 24.2, a brand new cutting concept, CoroPhab 24.2 is a complete tool technology to provide all different tool and more. All designed to provide customer productivity and drive cost savings. This is not just a tool, it's a solution. Contact your local Sandvik Coated Tools Representative. We are here to support your tool savings project. Shaping the future together.

[Sandvik Coated Tools and Solutions](#)

**Latest cutting tools**

**Audiences**

Search

- John Hocking
- John Hocking

### 8.1.3 Edit an In Progress Announcement

To edit an in-progress announcement, follow the instructions:

- In the announcements screen, enable the **In Progress** button. The In Progress announcements are displayed in the grid.

Figure 138: In Progress Announcement

S/N	Title	Created By	Publisher	Published On	Audience
1133	Testing	Thomas Henry	Thomas Henry	01-Oct-24	2

- Click on a specific announcement from the list to open the announcement.

Figure 139: Message Body

3. In the **Message Body** tab, edit the **Title**, **Message** and add attachment by clicking the **New Attachment** button.



*Attachment can be deleted by clicking the delete icon adjacent to the uploaded file.  
The uploaded attachment can be downloaded.*

4. Click **Next** to select the audience for the new announcement. The **Select Audience** tab is displayed.



*Click **Save as Draft** to save the partial announcement to complete and publish it later.*

Figure 140: Select Audience

5. On the **Select Audience** tab, do the following:

- Enable the locations listed in the **Select Locations**.



*The search bar enables to easily search for specific locations.  
The locations are displayed based on the preferences set for the logged in user.*

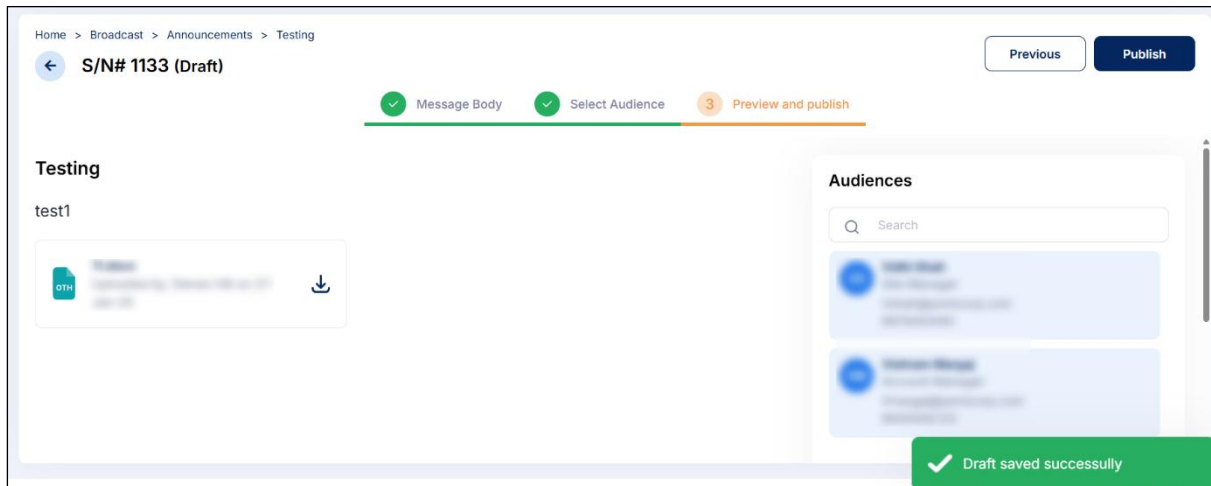
- Enable **Corporate Contacts**
- Enable **Site Level Contacts**

- Search **Audience** using the Search bar.
6. Click **Preview** to preview the Announcement, the **Preview and Publish** tab is displayed.



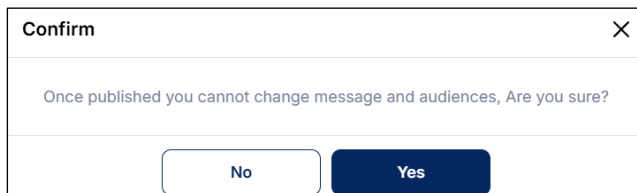
Click **Save as Draft** to save the announcement and publish it later.  
Click **Previous** to go back to the Message Body tab

Figure 141: Preview and publish



7. View the announcement and click **Publish** to publish the announcement. A confirmation popup is displayed.

Figure 142: Confirm publishing



8. Click **Yes** to publish the announcement. The audience will receive the announcement email, and the announcement will be updated in the announcement list.

### 8.1.4 Delete an announcement

To delete an announcement, follow the instructions:

1. In the announcement page, click the delete icon corresponding to the record/announcement to delete.

Figure 143: Announcements

S/N	Title	Created By	Publisher	Published On	Audience
1134					0
1133					2
1059				01-Oct-24	197
1058				19-Sep-24	197
1020				28-Nov-23	171
16				30-Oct-23	150
15				25-Oct-23	88

2. A confirmation pop up is displayed. Click **Yes** to delete the announcement.

Figure 144: Delete Announcement

**Delete Announcement**

Are you sure, you want to delete this Announcement?

No Yes



*Only In progress announcements can be deleted.*

## 8.2 Product Obsolescence

This product obsolescence page streamlines the process of managing obsolescence products by allowing users to easily upload a file containing a list of obsolete products along with their corresponding replacement details, thus ensuring a smooth transition to newer alternatives, minimizing disruptions.

**To view the product obsolescence list, follow the instructions:**

1. Login to the application.
2. In the main menu, click Broadcast, the Announcements and Product Obsolescence are displayed.

Figure 145: Main Menu- Broadcast

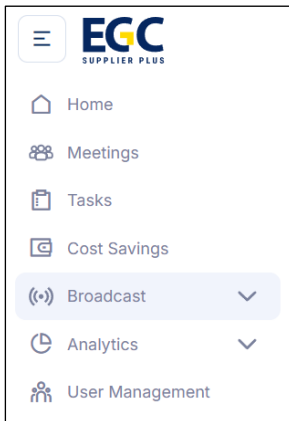
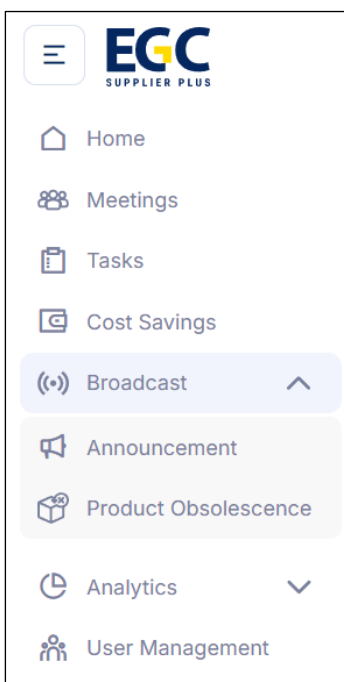
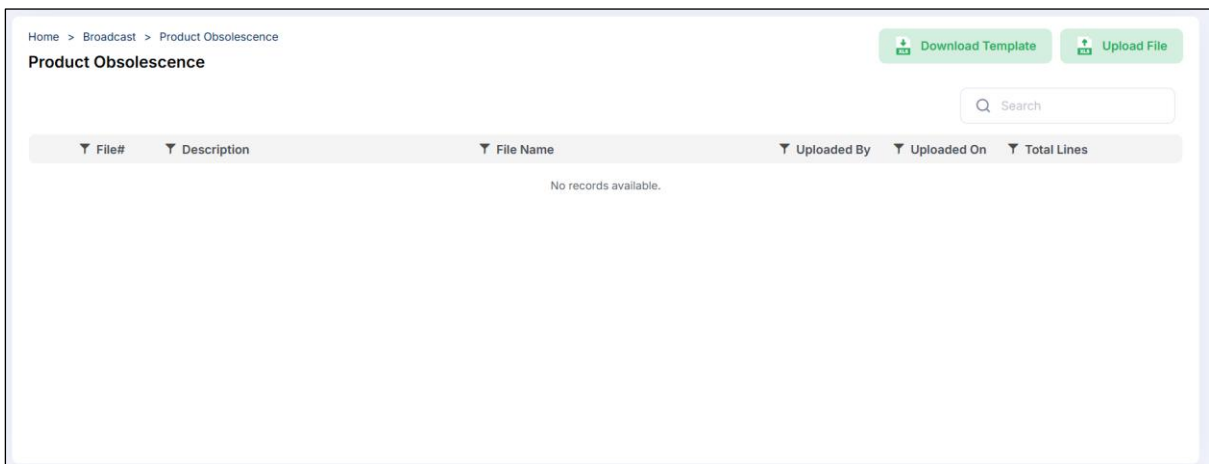


Figure 146: Product Obsolescence



3. Click the product obsolescence icon to view the list of product obsolescence files.

Figure 147: Product Obsolescence



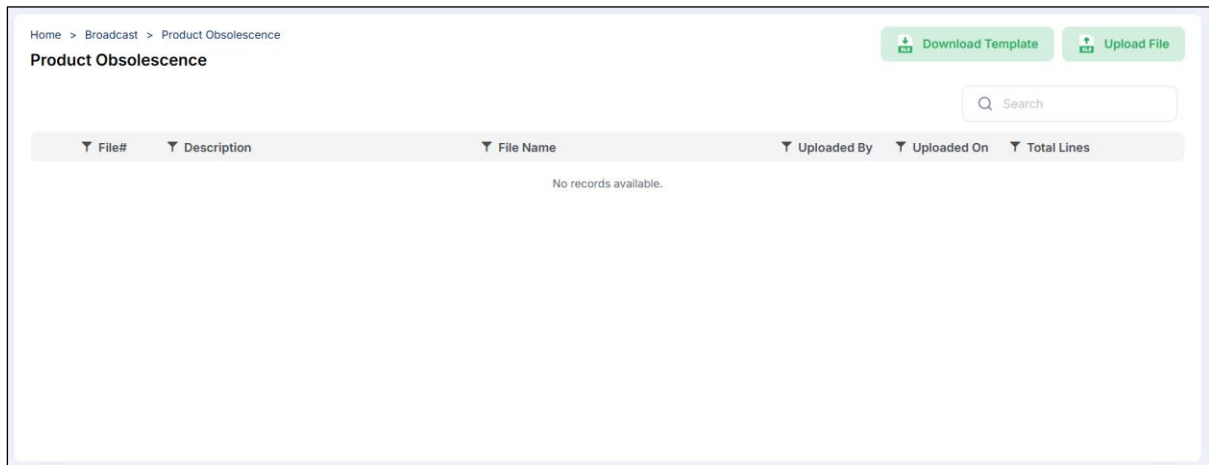
## 8.2.1 Upload Product Obsolescence files

The user can upload an Excel file with details using the template provided in the screen.

**To upload file, follow the instructions:**

1. In the Product Obsolescence screen, click **Download Template**. An Excel Document template is downloaded.

Figure 148: Product Obsolescence files



2. The file is as shown. Enter the following details in the template:
  - EDP Number
  - **Obsolescence Date:** The date the old product is considered obsolete.
  - **Replacement EDP:** The replacement product EDP
  - **Replacement Cost:** The cost for the replacement
  - **Replacement Lead Time (Days):** The number of days for replacement
  - **Replacement Description:** The description pertaining to the replacement.
  - **Replacement Other Part# (ISO Etc):** The parts that are being replaced.

Figure 149: Product Obsolescence template

	A	B	C	D	E	F	G	H
1	EDP Number*	Obsolescence Date*	Replacement EDP*	Replacement Cost*	Replacement Lead Time (Days)*	Replacement Description*	Replacement Other Part# (ISO Etc)	
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								

3. Save and close the file. Click **Upload File**. A pop up is displayed.
4. Browse the template file with values and upload the obsolescence details.

## 9. Analytics

The data displayed in the analytics is based on the profile of the user. Any update in the preferences can be viewed in the next system update.

Analytics is segregated into 2 types: Cost Savings and Sales

### 9.1 Cost Savings

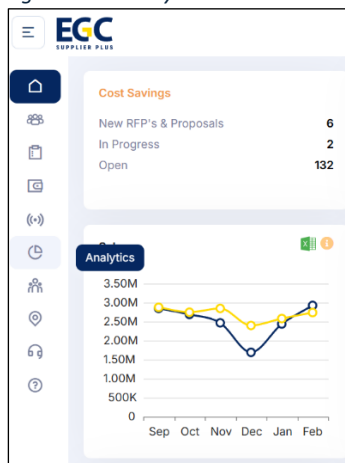
The cost savings of the company and their sites can be viewed against the targets enabling the Supplier User to visualize how far they are from the target.

Cost savings drill down data into locations, customer group, and customer sites to help the Supplier Partner view their target.

**To view cost savings, follow the instructions:**

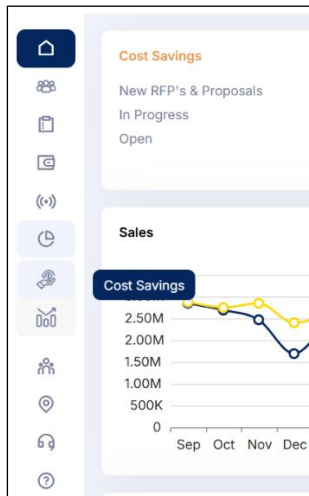
1. Login to the application.
2. In the main menu, click **Analytics**. The sub-categories are displayed in the menu.

Figure 150: Analytics



3. Click **Cost Savings**; the screen displays the cost savings graphs.

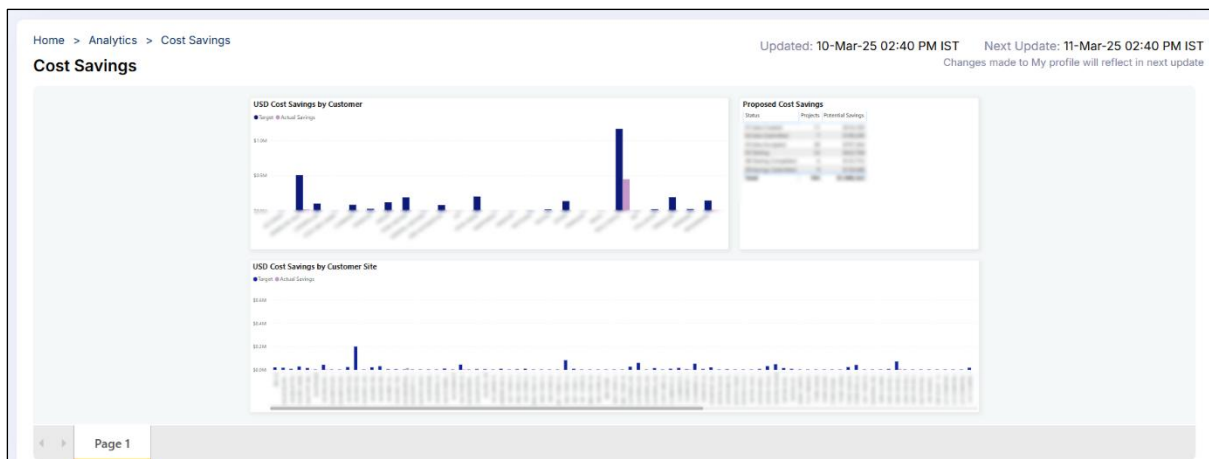
Figure 151: Cost Savings menu



4. The cost savings screen displays the following:

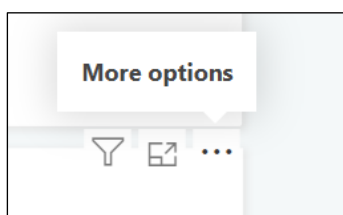
- **USD Cost Savings by Customer:** The graph displays the target and the actual savings of each customer. By default, all the End Customer data is displayed. Target is displayed in blue and actual implemented cost savings are displayed in purple.
- **USD Cost Savings by End Customer Site:** The graph displays the target, and the actual savings of all the end customer locations. By default, all the sites' data is displayed. Target is displayed in dark blue and actual savings are displayed in purple.
- **Proposed Cost Savings:** The status of the tests, projects and the potential savings are displayed in a table.

Figure 152: Cost Savings



Hovering over the graph/table will display the following options:

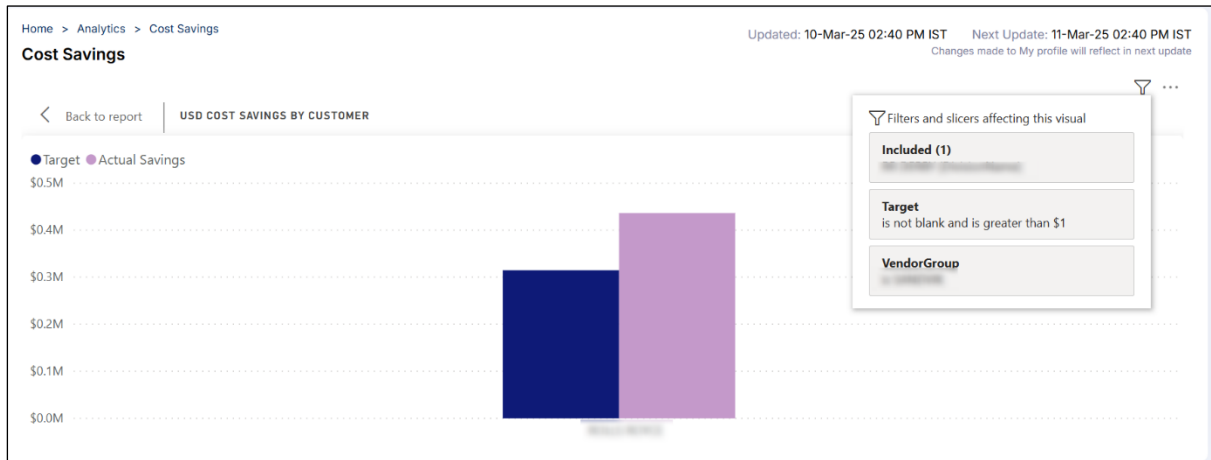
Figure 153: Hover options





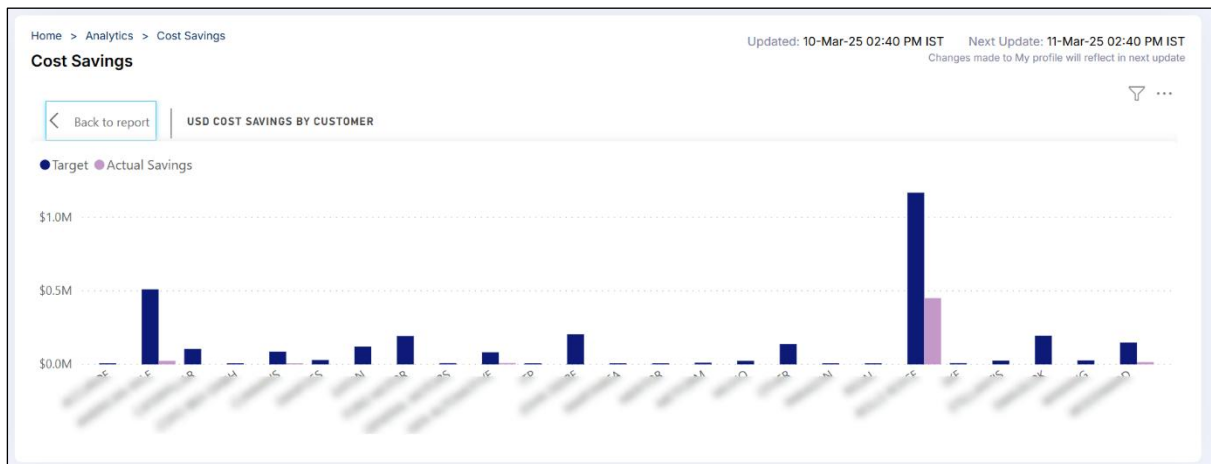
- **Filter:** Enables to view the filters and slicers (allow users to filter and view specific subsets of data in a graph or chart) affecting the displayed graph

Figure 154: Filter option



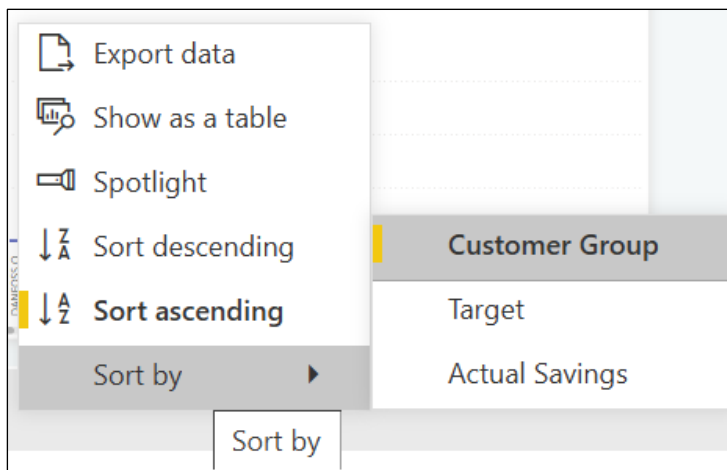
- **Focus mode:** Enables to expand the graph/table for clearer view.

Figure 155: Focus Mode



- **More options**

Figure 156: Hover-more options



Clicking More options enables the user to perform the following:

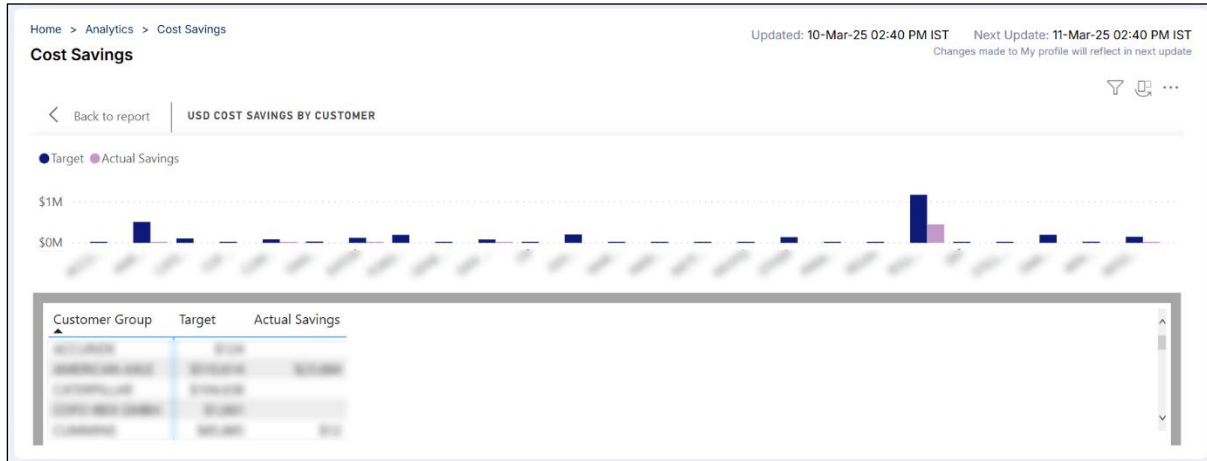
- **Export Data:** Enables to export graph/table data to an Excel file.



Data can be exported to xls or xlsx format. The data exported will applied filters. For larger data models, limited number of rows will be exported.

- **Show as a table:** Displays the graphical data in a table.

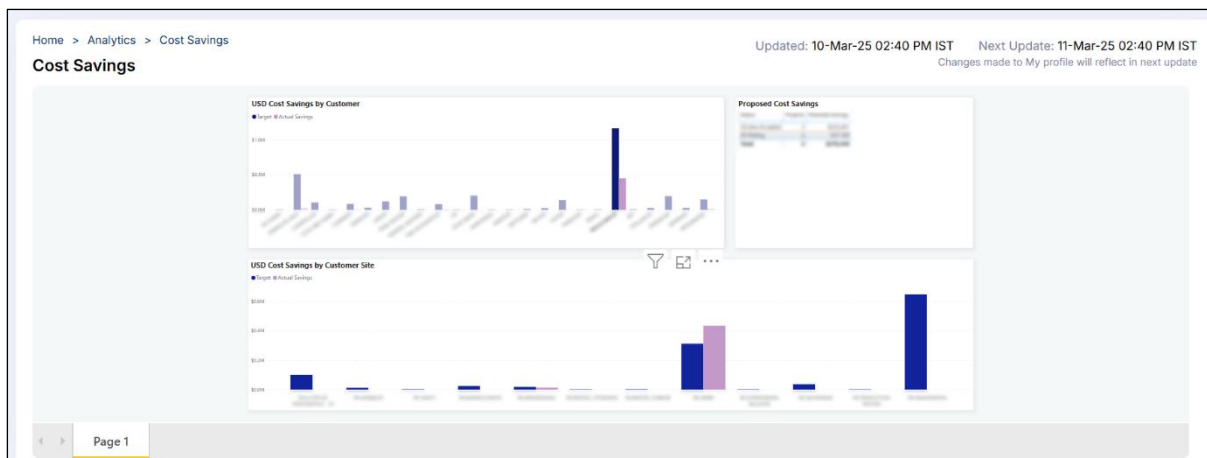
Figure 157: Show as table



- **Sort descending:** Filters data in descending order.
- **Sort ascending:** Filters data in ascending order.
- **Sort by:** The data can be sorted in any one of the following orders.
  - **Division**
  - **Target**
  - **Actual Savings**

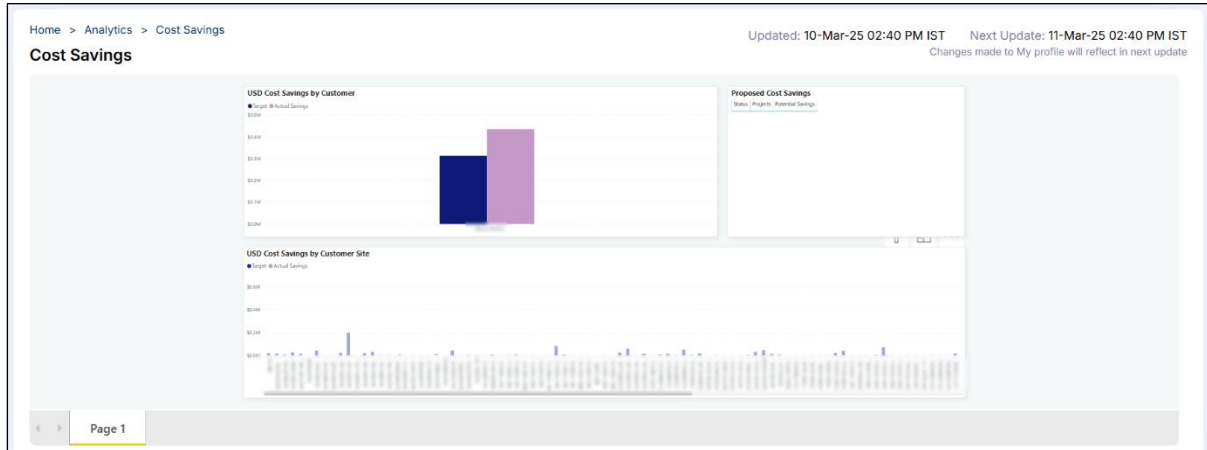
Clicking/selecting on specific End Customer/company in the Cost savings by customer graph, the specific End Customer sites are displayed and proposed cost savings are updated accordingly.

Figure 158: Select customer in Cost Savings by Customer



Clicking on an individual site in the cost savings by customer site graph will display the specific site in the cost savings by End Customer graph and the proposed cost savings table display the amount for specific ideas of the projects.

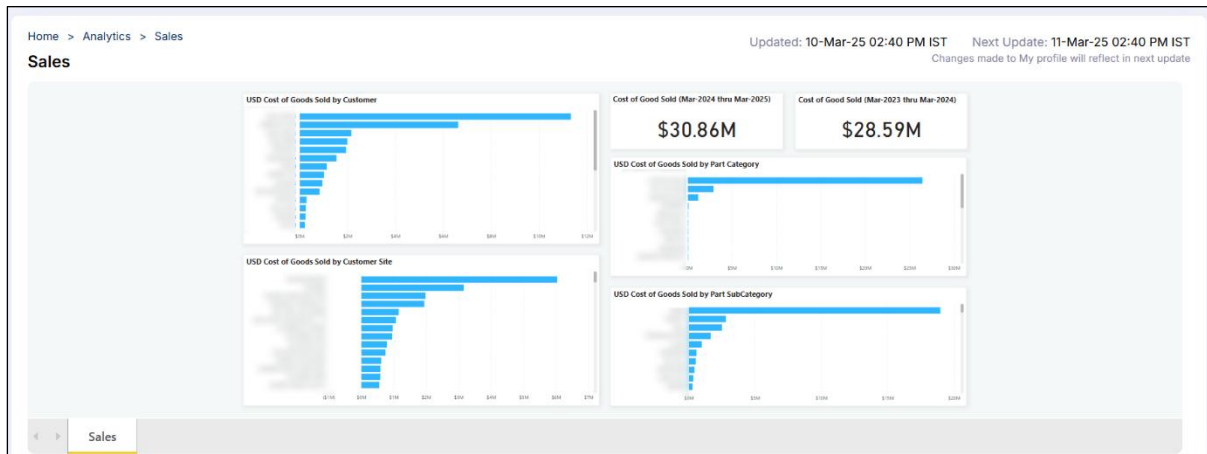
Figure 159: Selecting specific site



## 9.2 Sales

The Sales screen of the analytics provide a clear view of your sales performance. This screen displays critical data, including the Cost Of Goods Sold(CODS) by each customer and their respective sites, as well as detailed breakdowns by part category and subcategory. With the ability to compare sales figures from the current and previous financial years, you can make informed decisions that drive growth and optimize your operations.

Figure 160: Sales Analytics

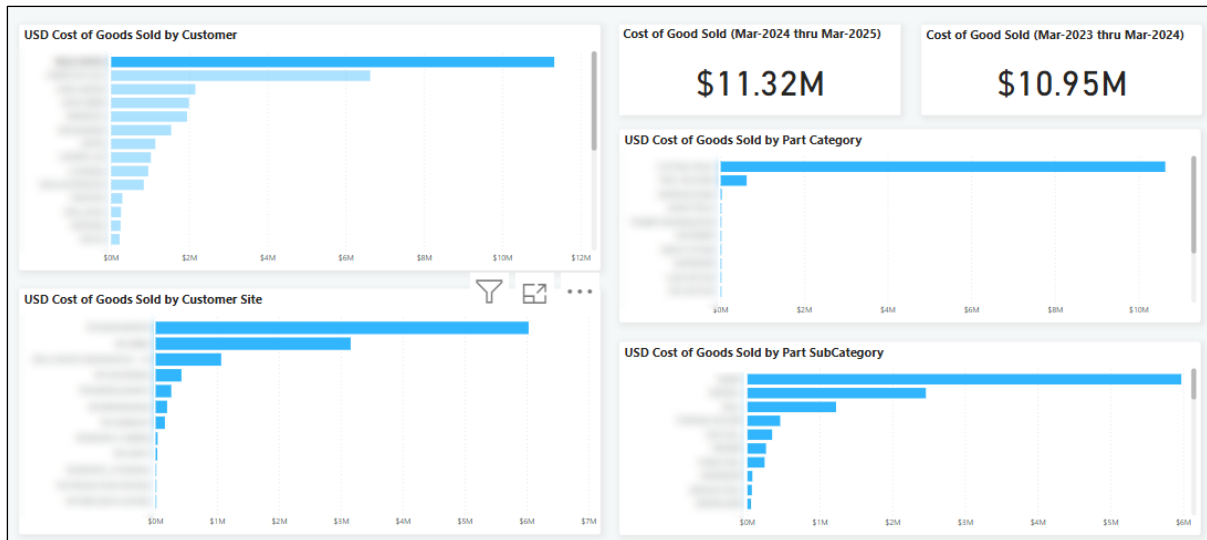


Hovering over specific bar of the graph displays the following:

- **Customer Group/Division/Part Category/Part subcategory**
- **Cost of Goods Sold (COGS) in USD**
- **Percentage of customer/division sale (only for customer and sites)**
- **Percentage of customer like sales/division like sales**

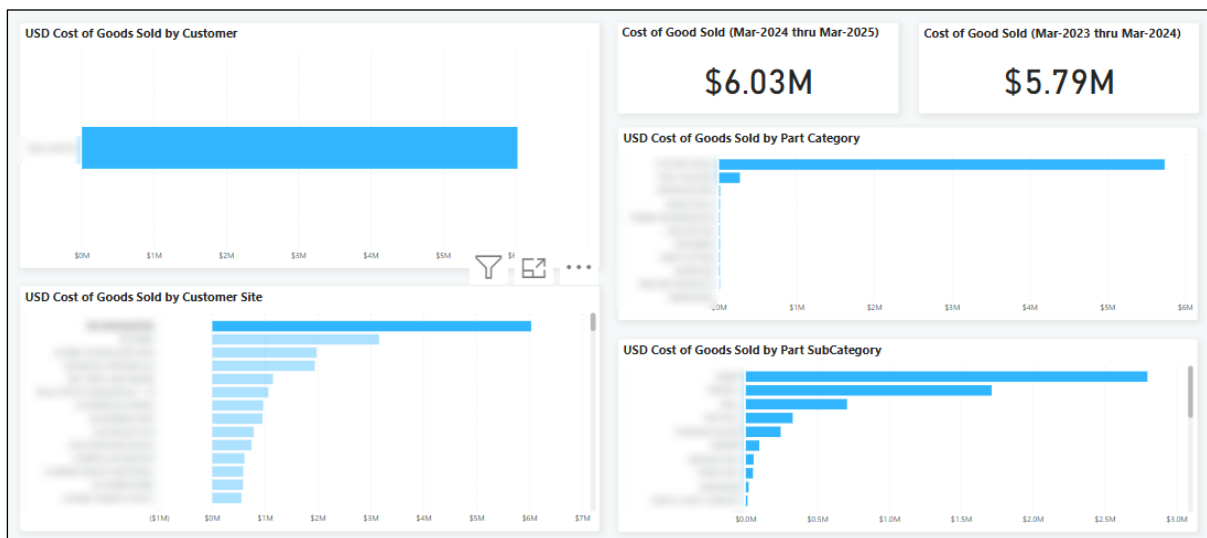
Clicking on a specific customer will display only the specific customer sites in the **USD Cost of Goods Sold in customer site** graph.

Figure 161: Sales for specific customer



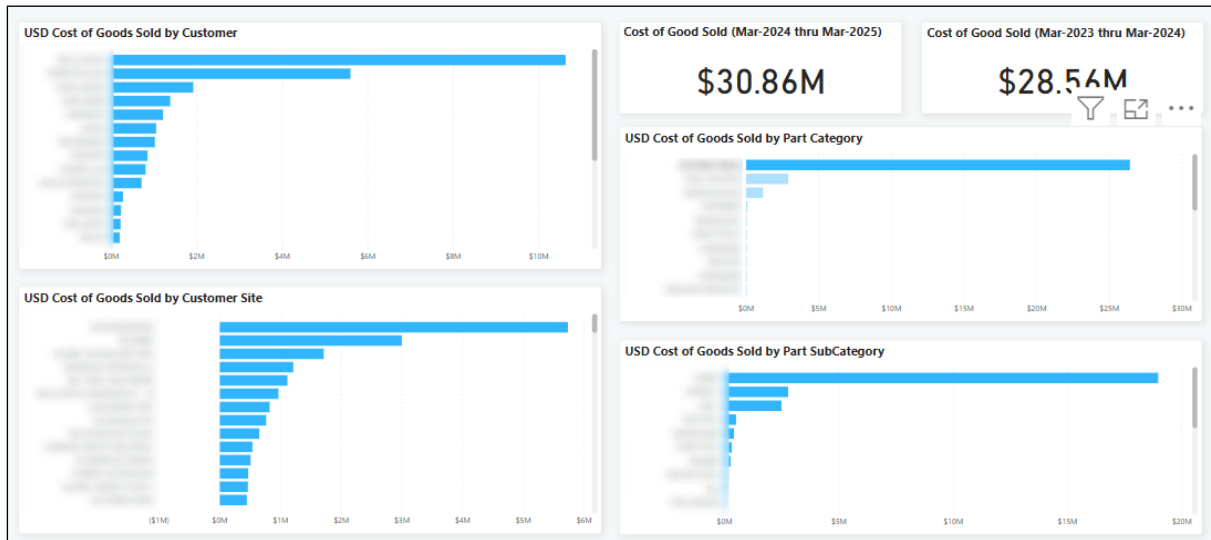
Clicking specific customer site will display the specific customer, and **Cost of Goods Sold (COGS) by part category and sub part category**.

Figure 162: Sales for specific customer site



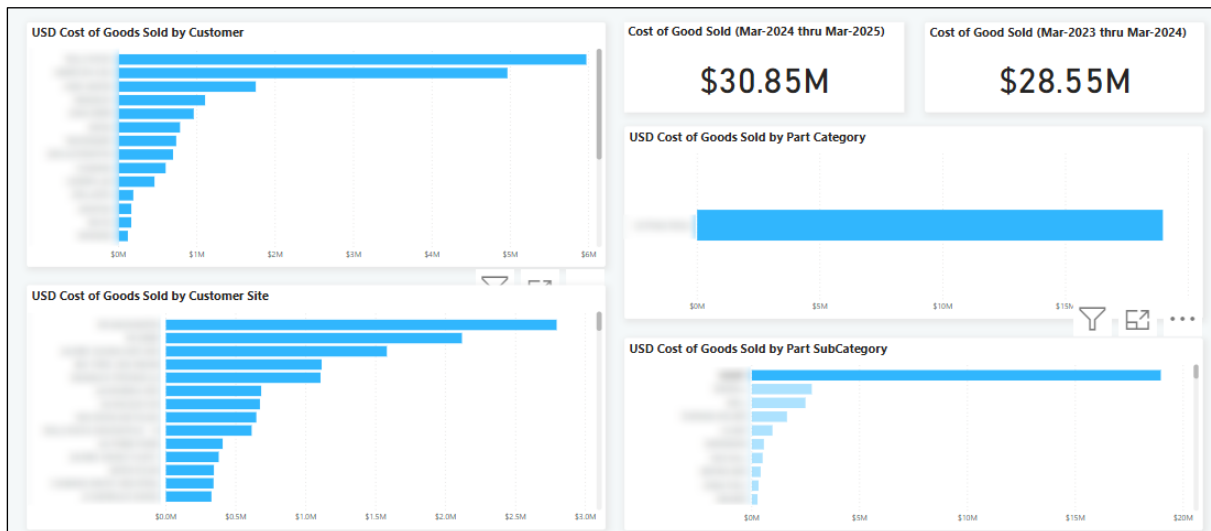
Clicking on a specific part category will display the Cost of Goods Sold (COGS) pertaining to the part category for customers/sites and their respective subcategory cost.

Figure 163: Sales for specific part category



Clicking on specific subcategory will display the Cost of Goods Sold (COGS) pertaining to the specific subcategory for each customer, site and the part category cost.

Figure 164: Sales for specific part subcategory



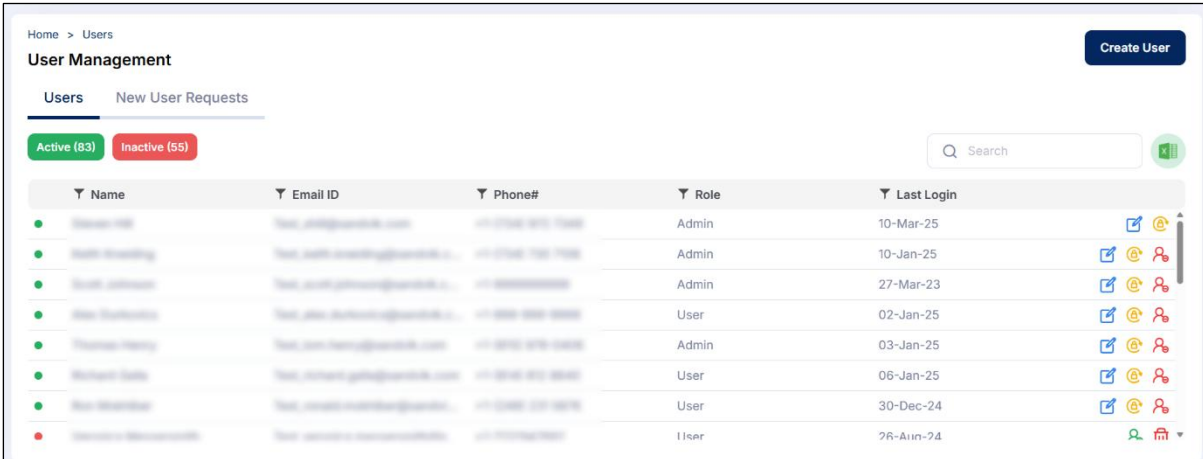
## 10. User Management (for admin users)

The User Management module enables administrators to create new users, monitor both active and inactive accounts, and manage user requests pending approval. Additionally, the module facilitates essential functions such as deleting, activating, deactivating, changing passwords, and editing user details, ensuring efficient oversight and streamlined operations. This module is available explicitly for Admin users.

There are 2 types of users:

- Admin Users
- Users (Normal User)

Figure 165: User Management



Name	Email ID	Phone#	Role	Last Login
Admin User	Test.admin@egc.com	+1 2345 678 9000	Admin	10-Mar-25
Admin User	Test.admin@egc.com	+1 2345 678 9000	Admin	10-Jan-25
Admin User	Test.admin@egc.com	+1 2345 678 9000	Admin	27-Mar-23
Admin User	Test.admin@egc.com	+1 2345 678 9000	User	02-Jan-25
Admin User	Test.admin@egc.com	+1 2345 678 9000	Admin	03-Jan-25
Admin User	Test.admin@egc.com	+1 2345 678 9000	User	06-Jan-25
Admin User	Test.admin@egc.com	+1 2345 678 9000	User	30-Dec-24
Admin User	Test.admin@egc.com	+1 2345 678 9000	User	26-Aug-24

The list of users can be downloaded and viewed in an Excel sheet.

### 10.1 Active Users

Active users are users who are currently accessing the supplier portal. The admin can view the list of active users and can edit the user, reset user's password and inactivate an active user.

#### 10.1.1 Edit User

The admin can edit an active user by editing the details, functional access and edit the preferences.

**To edit an active user, follow the instructions:**

1. Login to the application.
2. In the main menu, click User Management, the **User Management** screen is displayed.
3. Enable **Active** button in the **Users** tab to view the list of active users.

Figure 166: Active Users

Name	Email ID	Phone#	Role	Last Login
Steven Hill	Test_sahill@egc.com	+1 708 975 7588	Admin	12-Mar-25
Keith Manning	Test_keith.manning@egc.com	+1 708 975 7588	Admin	10-Jan-25
Scott Johnson	Test_sjohnson@egc.com	+1 708 975 7588	Admin	27-Mar-23
Joe Sullivan	Test_joe.sullivan@egc.com	+1 708 975 7588	User	02-Jan-25
Thomas Henry	Test_thom.henry@egc.com	+1 708 975 7588	Admin	03-Jan-25
Michael Kelly	Test_michael.kelly@egc.com	+1 708 975 7588	User	06-Jan-25
Tom Mueller	Test_tom.mueller@egc.com	+1 708 975 7588	User	30-Dec-24
Bob Taylor	Test_bob.taylor@egc.com	+1 708 975 7588	User	06-Jan-25

- Click the edit icon corresponding to the user to edit. The user details are displayed in edit mode.

Figure 167: Edit user

**Edit User**

**General Information**

First Name \*

Last Name \*

Email ID \*

Designation

Phone Number \*

**Functional Access**

☒ Task

☒ Meeting

☒ Cost Saving

☒ Corporate Announcement

☒ Product Obsolescence

**Set Preferences**

Select Country

United States of America

Select Sites

Search

☒ SELECT ALL

☒ Accounts Payable

☒ Accounts Receivable

☒ Accounts Payable & Receivable

☒ Accounts Payable & Receivable & Inventory

- Edit the following details:
  - General Information**
  - Functional Access:** If the normal user requests access to new modules, the module is highlighted specifying as new request, and the admin can enable the module to provide access to the user.
  - Set Preferences**
- Click **Update**. The user details are updated.

## 10.1.2 Reset Password

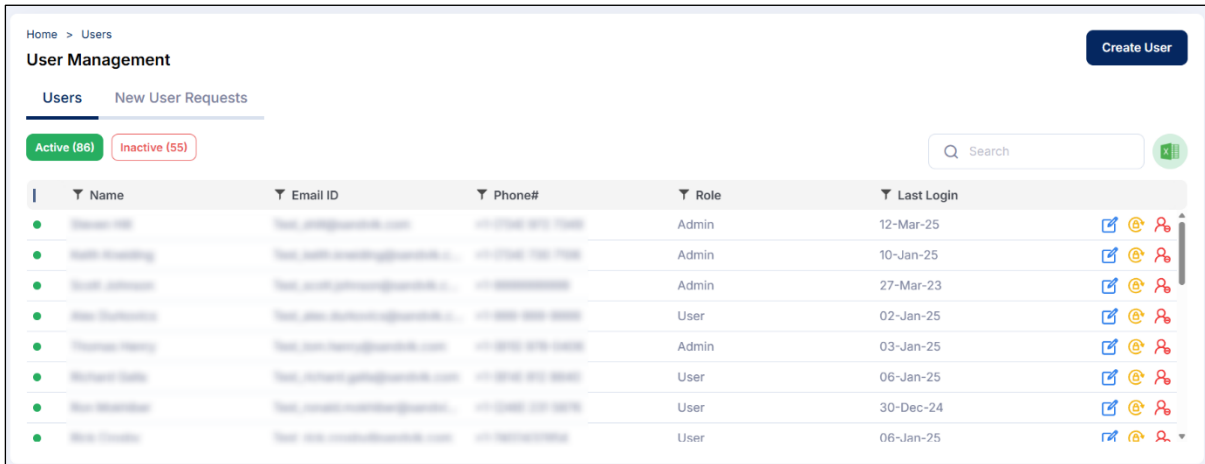
The admin can send a request to the user to reset the password.

**To send password reset, follow the instructions:**

- Login to the application.
- In the main menu, click User Management, the **User Management** screen is displayed.

3. Enable **Active** button in the **Users** tab to view the list of active users.

Figure 168: Active Users

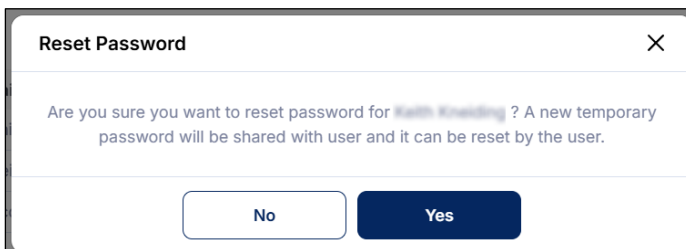


The screenshot shows the 'User Management' page with the 'Users' tab selected. There are two buttons at the top: 'Active (86)' and 'Inactive (55)'. A search bar is on the right. Below is a table of users.

	Name	Email ID	Phone#	Role	Last Login	
	Steven Hill	Test_sahill@egc.com	+1 704 972 1000	Admin	12-Mar-25	
	Kath Knudsen	Test_kath.knudsen@egc.com	+1 704 972 1000	Admin	10-Jan-25	
	Scott Johnson	Test_sjohnson@egc.com	+1 704 972 1000	Admin	27-Mar-23	
	Joe Johnston	Test_johnstjohn@egc.com	+1 704 972 1000	User	02-Jan-25	
	Thomas Henry	Test_thom.henry@egc.com	+1 704 972 1000	Admin	03-Jan-25	
	Michael Gable	Test_michael.gable@egc.com	+1 704 972 1000	User	06-Jan-25	
	Joe Johnston	Test_johnstjohn@egc.com	+1 704 972 1000	User	30-Dec-24	
	Joe Johnston	Test_johnstjohn@egc.com	+1 704 972 1000	User	06-Jan-25	

4. Click the reset password icon corresponding to the specific user. A confirmation pop up is displayed.

Figure 169: Reset Password



The dialog box is titled 'Reset Password' and contains the following text: 'Are you sure you want to reset password for Kath Knudsen ? A new temporary password will be shared with user and it can be reset by the user.' At the bottom are two buttons: 'No' and 'Yes'.

5. Click **Yes**, an email is sent to the user with a temporary password. The user can login and change the password.

### 10.1.3 Inactivate a user

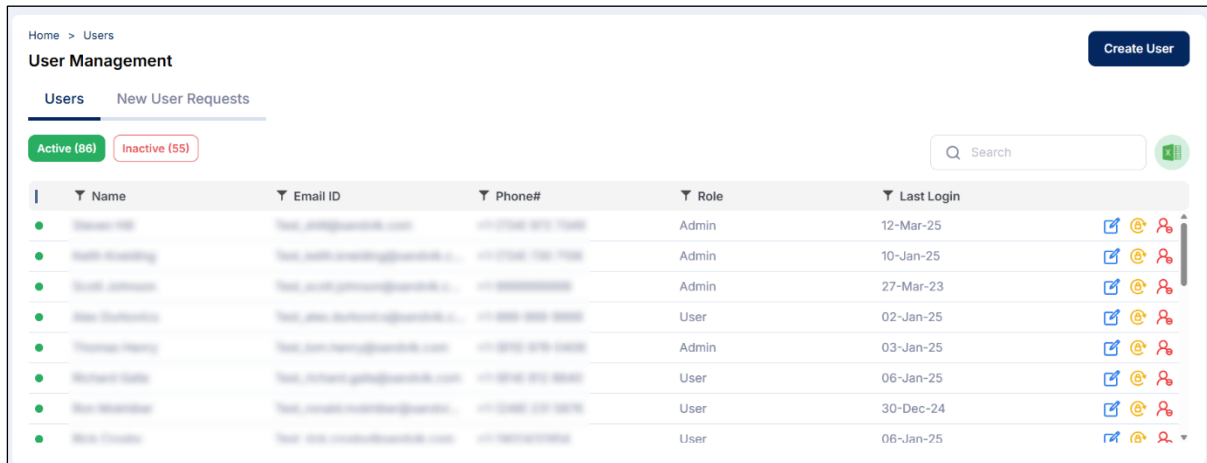
The admin can inactivate the existing user at any point of time.

**To inactivate the user, follow the instructions:**

1. Login to the application.
2. In the main menu, click User Management, the **User Management** screen is displayed.
3. Enable **Active** button in the **Users** tab to view the list of active users.



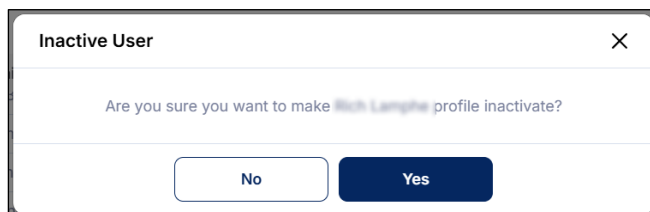
Figure 170: Active Users



Name	Email ID	Phone#	Role	Last Login
Steven Hill	Test_sahill@egcportal.com	+1 770 661 7168	Admin	12-Mar-25
Keith Manning	Test_keith.manning@egcportal.com	+1 770 661 7168	Admin	10-Jan-25
Scott Johnson	Test_sjohnson@egcportal.com	+1 888 888 8888	Admin	27-Mar-23
John Williams	Test_john.williams@egcportal.com	+1 888 888 8888	User	02-Jan-25
Thomas Henry	Test_thom.henry@egcportal.com	+1 888 888 8888	Admin	03-Jan-25
Michael Kelly	Test_michael.kelly@egcportal.com	+1 888 888 8888	User	06-Jan-25
Ben Williams	Test_ben.williams@egcportal.com	+1 770 661 7168	User	30-Dec-24
Ben Williams	Test_ben.williams@egcportal.com	+1 770 661 7168	User	06-Jan-25

- Click the inactivate user icon corresponding to the specific user. A confirmation pop up is displayed.

Figure 171: Inactive user



- Click **Yes**. The user is inactivated, and the user is listed in the Inactive list.

## 10.2 Inactive Users

Inactive users are users who are registered to the application but the administrator has not activated the user, or the admin has inactivated the user for a reason.

The users who have not logged in to the application in the last 45 days are listed in the Inactive users list. If the person is not logged in for 15 days, they receive an email reminder.

The admin receives an email on the first day of the month with the list of users and their status. The admin can view the list of inactive users in the Inactive Users screen and can activate or delete the user.

### 10.2.1 Activate the user

The admin can activate an inactive user or a new user who has registered to the supplier portal.

**To inactivate the user, follow the instructions:**

- Login to the application.
- In the main menu, click user management, the **User Management** screen is displayed.
- Enable **Inactive** button in the **Users** tab to view the list of inactive users.

Figure 172: Inactive Users

Name	Email ID	Phone#	Role	Last Login
Terence McConville	Test.terence.mcconville@egc.com	+1 773-661-1800	User	26-Aug-24
Jeff Moore	Test.jeff.moore@egc.com	+1 773-661-1800	User	NA
Luella McConville	Test.luella.mcconville@egc.com	+1 773-661-1800	User	27-Nov-24
Eric Brown	Test.eric.brown@egc.com	+1 773-661-1800	User	03-Sep-24
Michael Langford	Test.michael.langford@egc.com	+1 773-661-1800	User	01-Jul-24
Steve Weston	Test.steve.weston@egc.com	+1 773-661-1800	User	NA
Angela Phelan	Test.angela.phelan@egc.com	+1 773-661-1800	User	NA

- Click the activate user icon corresponding to the specific user. A confirmation pop up is displayed.

Figure 173: Activate user

**Activate user** ×

Are you sure you want to activate "Jeff Moore" ?

- Click **Yes**, the user is activated, and the user is listed in the Active list.

## 10.2.2 Delete user

The admin can delete an inactive user.

**To delete the user, follow the instructions:**

- Login to the application.
- In the main menu, click User Management, the **User Management** screen is displayed.
- Enable **Inactive** button in the **Users** tab to view the list of inactive users.

Figure 174: Inactive Users

Home > Users

**User Management**

Users | New User Requests

Active (85) | **Inactive (56)**

Search

Name	Email ID	Phone#	Role	Last Login
Matthew Brown	Test_mattbrown@egc.com	+1 800 882 0000	User	26-Aug-24
Jeff Hines	Test_jeffhines@egc.com	+1 800 882 0000	User	NA
Luella McCord	Test_luella.mccord@egc.com	+1 800 882 0000	User	27-Nov-24
Eric Brown	Test_eric.brown@egc.com	+1 800 882 0000	User	03-Sep-24
Richard Langpher	Test_richard.langpher@egc.com	+1 800 882 0000	User	01-Jul-24
Steve Hines	Test_steve.hines@egc.com	+1 800 882 0000	User	NA
Angela Phelan	Test_angela.phelan@egc.com	+1 800 882 0000	User	NA

- Click the delete icon corresponding to the specific user. A confirmation pop up is displayed.

Figure 175: Delete user

**Delete user**

Are you sure you want to delete Rich Langpher?

No Yes

- Click **Yes**, the user is deleted.

## 10.3 New User Requests

The new user requests are the users who have registered to the application from the login/registration screen.

The **New User Requests** tab of the User Management screen enables the administrator to view the requests. The requests are classified into two categories: **Awaiting Approval** and **Rejected**.

Figure 176: New User Requests

Home > Users > New User Requests

**User Management**

Users | **New User Requests**

Awaiting Approval (37) | Rejected (1)

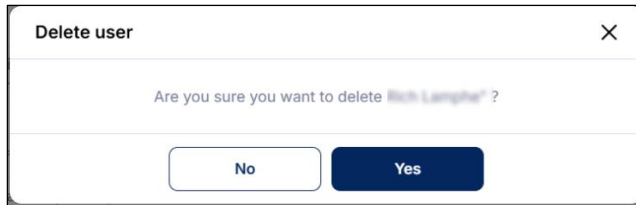
Search

Name	Email ID	Phone#	Request Date	Description
Matthew Brown	Test_mattbrown@egc.com	+1 800 882 0000	27-Feb-23	From Cost Savings
Luella McCord	Test_luella.mccord@egc.com	+1 800 882 0000	16-Mar-23	From Supplier Collaboration
John Hines	Test_john.hines@egc.com	+1 800 882 0000	24-Mar-23	From Supplier Collaboration
Angela Phelan	Test_angela.phelan@egc.com	+1	30-Mar-23	From Supplier Collaboration
Steve Hines	Test_steve.hines@egc.com	+1	30-Mar-23	From Supplier Collaboration
Eric Brown	Test_eric.brown@egc.com	+1	30-Mar-23	From Supplier Collaboration

### 10.3.1 Delete a user request

The administrator can delete a new user request. The admin can click the delete icon corresponding to the request. A popup is displayed.

Figure 177: Delete new user approval



On confirming the request is deleted.

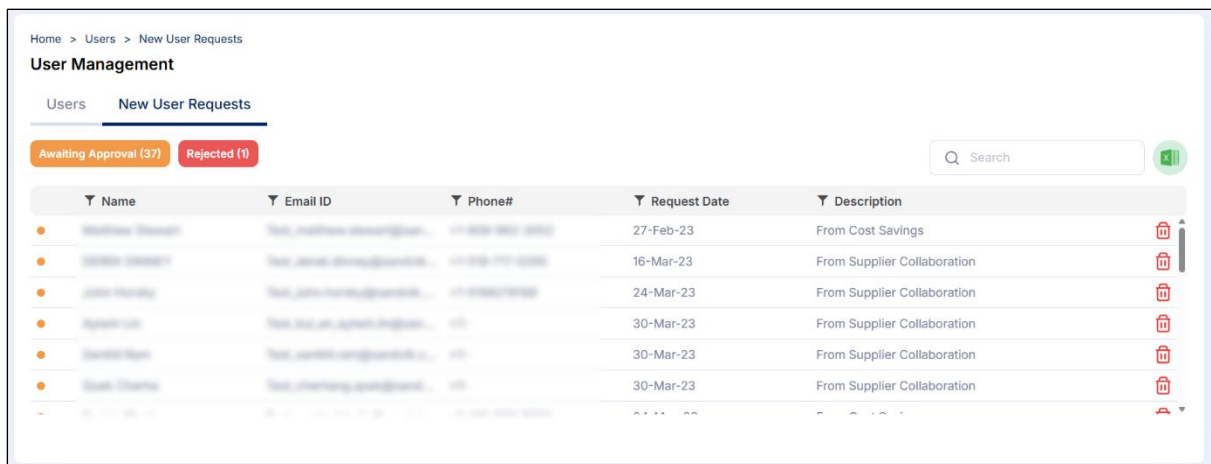
### 10.3.2 Approve a new user request

The admin can approve a new user request.

**To approve a new user request, follow the instructions:**

1. Click the **New User Requests** tab in the **User Management** screen. The new user requests are displayed in a grid.

Figure 178: New User requests



2. Click the request to approve. The **Registration Request** details are displayed.

Figure 179: Registration details



The admin can approve a new user from the **Awaiting Approval** or **Rejected** bucket

3. On the screen, do the following:

- Enter/Edit general information.
- Edit **Preferences**
- Edit **Functional Access**- By default **Meeting** and **Task** are enabled.
  - Enable a new module from disabled state.
  - Enable a module which was requested by the user.



The **Meeting** and **Task** cannot be disabled. The module requested by the user will be displayed as **New Request** against the module.  
The module requested by the user can be accessed by the user only if the admin enables the module and approves.

4. Click **Approve** to approve the new user. The user will receive an email with a temporary password to login and complete the onboarding process. (Refer New user login)

### 10.3.3 Reject a new user request

The admin can reject a new user request.

To reject a new user request, follow the instructions:

1. Click the **New User Requests** tab in the **User Management** screen. The new user requests are displayed in a grid.

Figure 180: New User requests

Name	Email ID	Phone#	Request Date	Description
Matthew Brown	Test.matt.brown@egc.com	+1 800 882 0000	27-Feb-23	From Cost Savings
David Brown	Test.dave.brown@egc.com	+1 800 777 0000	16-Mar-23	From Supplier Collaboration
John Henry	Test.john.henry@egc.com	+1 800 777 0000	24-Mar-23	From Supplier Collaboration
Robert Lee	Test.robert.lee@egc.com	+1	30-Mar-23	From Supplier Collaboration
David Lee	Test.david.lee@egc.com	+1	30-Mar-23	From Supplier Collaboration
David Thomas	Test.david.thomas@egc.com	+1	30-Mar-23	From Supplier Collaboration

2. Click the request to reject. The **Registration Request** details are displayed.

Figure 181: Registration details

3. Click **Reject** to reject access to the new user. The request will be added to the Rejected bucket.




*The rejected requests can be approved by the admin.*

## 10.4 Create New User

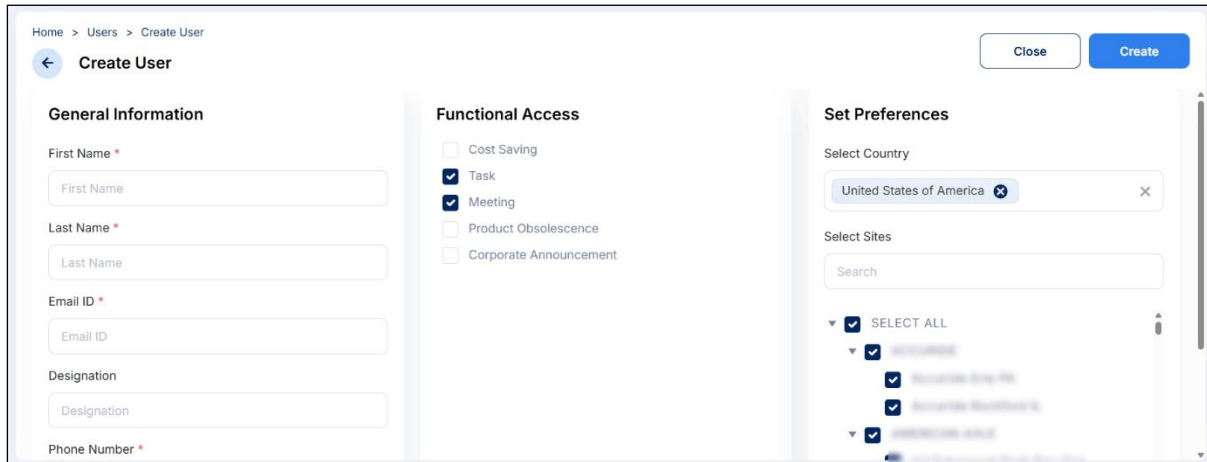
The user management screen allows the administrators to efficiently manage access to the application. It features options for creating new users, where administrators can input essential general information, configure functional access levels, and establish country and site preferences tailored to each user. This streamlined interface enhances user management and ensures a customized experience for all users.

**To create a new user, follow the instructions:**

1. Sign in to the EGC Supplier Plus application. The Dashboard screen is displayed.
2. In the main menu, click  icon to open the User Management screen.

3. Click **Create User** in the right top corner of the screen.

Figure 182: Create New User



4. In the screen, do the following:

- **General Information**
    - **First Name:** Enter the first name of the user.
    - **Last Name:** Enter the last name of the user.
    - **Email ID:** Enter the email address of the user.
    - **Designation:** Enter the designation of the user
    - **Phone Number:** Enter user's phone number.
    - **User Role:** Select the role (**Admin** or **End User**)
  - **Functional Access:** The functional accessibility is based on the role selected.
    - All modules are enabled for Admin user.
    - For a general user, **Task** and **Meeting** module are enabled. The admin can assign access to additional modules for a general user.
  - **Set Preferences-** The portal data will be curated based on your preferences.
    - **Select Country:** Enter/Select the countries for which the user can view data.
    - **Select Sites:** Enable/Select the sites.
5. Click **Create**. The new user is created and is listed in the **Active** users list. A mail is sent to the user with a temporary password. The user can login with the temporary password and completes the onboarding process. (Refer New user login)

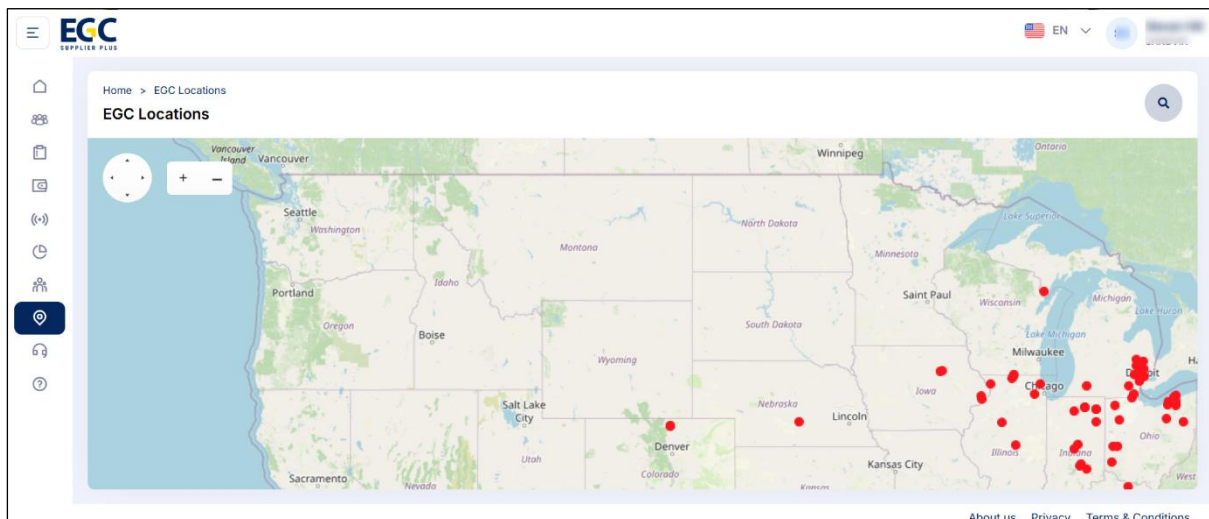
## 11. EGC Location

The EGC Locations Map showcases customers and site locations across the preferred countries. Each red dot represents a unique customer, providing instant access to essential information. Simply hover over a dot to reveal detailed insights, including customer names, addresses, commodities, and their specific products. This interactive map not only enhances your understanding of your customer base but also streamlines your operations, making it an invaluable resource for strategic planning and decision-making.

**To view EGC locations, follow the instructions:**

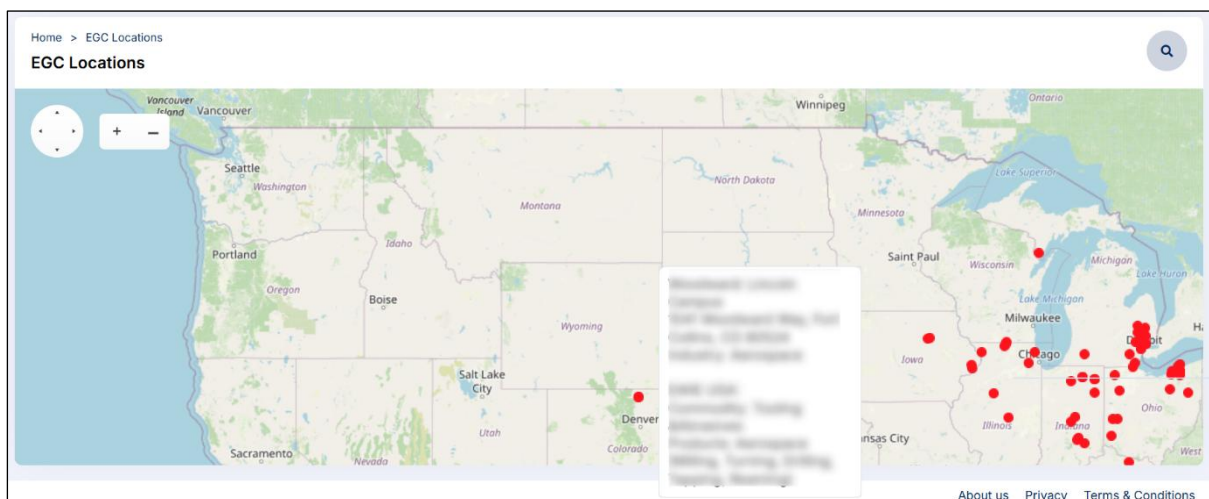
1. Login to the application.
2. In the main menu, click the EGC location icon. The map is displayed on the screen with customers and sites based on the preferences set in the user profile.

Figure 183: EGC Location



Hover over a red dot to display details of the customer, their commodity and products.

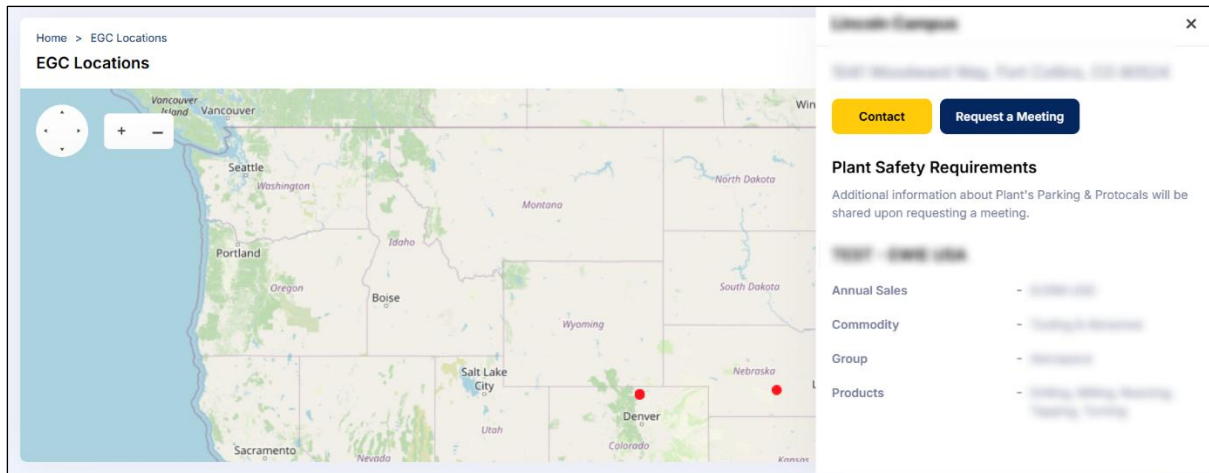
Figure 184: EGC Location - Hover





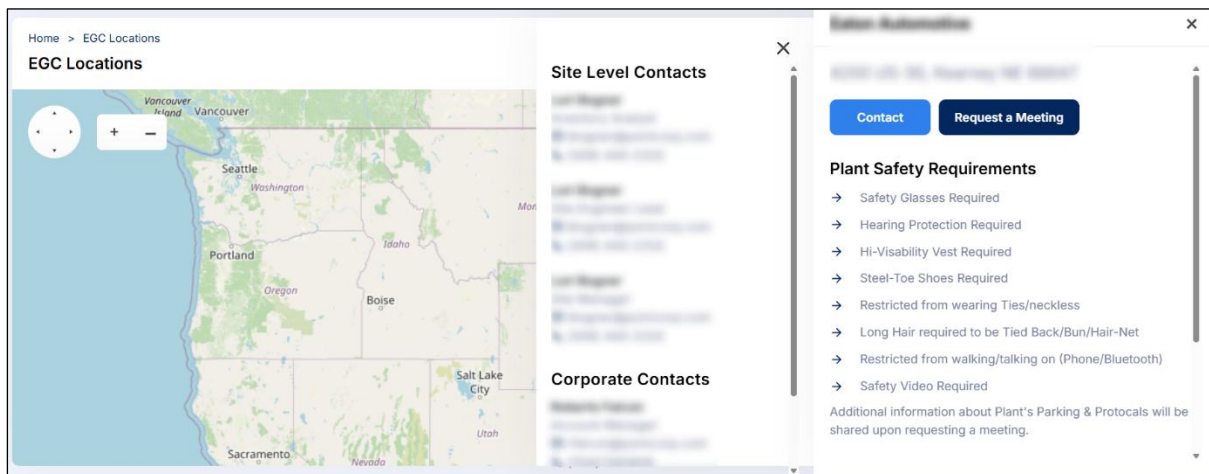
Click on the red dot to open the details on the right. The Plant Location Address, **Plant safety requirements, Annual Sales, Commodity, Group** and **Products** are displayed.

Figure 185: EGC Location – on click



Click **Contact** to view the contact information of the site level contacts and **the Corporate Contacts**.

Figure 186: EGC Location - Contact



Click **Request a meeting**. The screen directs to the Request a Meeting screen.