



SUPPLIER PORTAL-EGC Supplier Plus

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
ABC	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

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 (G&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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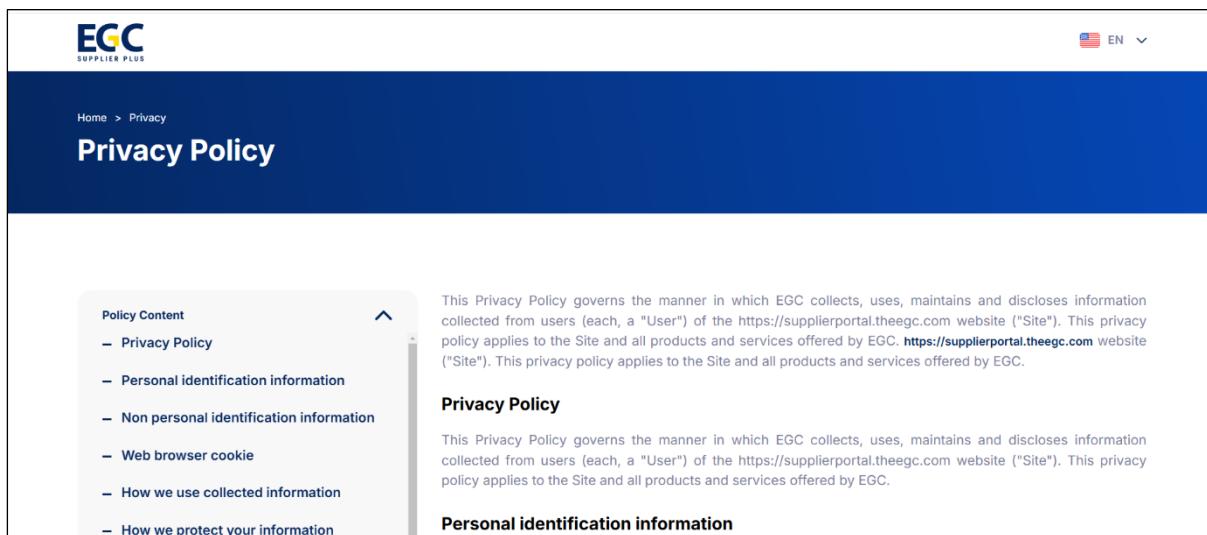
2.4 Privacy

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



This Privacy Policy governs the manner in which EGC collects, uses, maintains and discloses information collected from users (each, a "User") of the <https://supplierportal.theegc.com> website ("Site"). This privacy policy applies to the Site and all products and services offered by EGC. <https://supplierportal.theegc.com> website ("Site"). This privacy policy applies to the Site and all products and services offered by EGC.

Privacy Policy

This Privacy Policy governs the manner in which EGC collects, uses, maintains and discloses information collected from users (each, a "User") of the <https://supplierportal.theegc.com> website ("Site"). This privacy policy applies to the Site and all products and services offered by EGC.

Personal identification information

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

2.5 Terms & Conditions

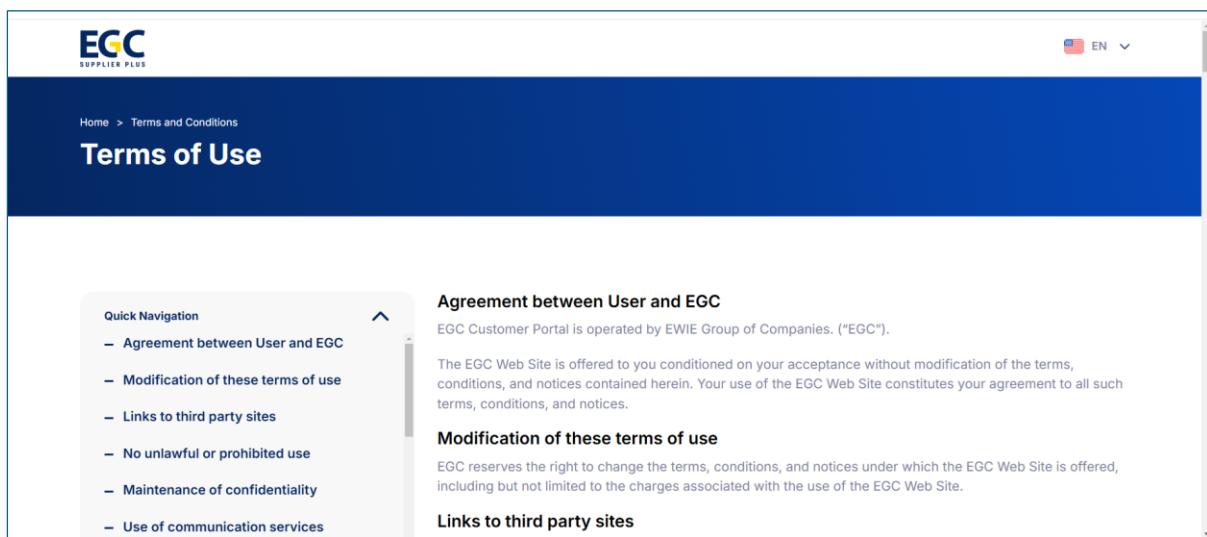
Terms and Conditions are the guidelines that control a user's use of an application. They spell out the rights and obligations of the user and safeguard the company. They consist of user limitations, rules of conduct, liability limitations, and dispute resolution etc.

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



The screenshot shows the EGC Supplier Plus Terms of Use page. The top navigation bar includes the EGC logo, a language selector (EN), and a search bar. The main content area has a dark blue header with the title 'Terms of Use'. Below the header, there is a 'Quick Navigation' sidebar on the left with the following links:

- [Agreement between User and EGC](#)
- [Modification of these terms of use](#)
- [Links to third party sites](#)
- [No unlawful or prohibited use](#)
- [Maintenance of confidentiality](#)
- [Use of communication services](#)

The main content area contains two sections: 'Agreement between User and EGC' and 'Modification of these terms of use'. The 'Agreement between User and EGC' section includes a sub-section for 'Links to third party sites'.

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

2.6 Contact Us

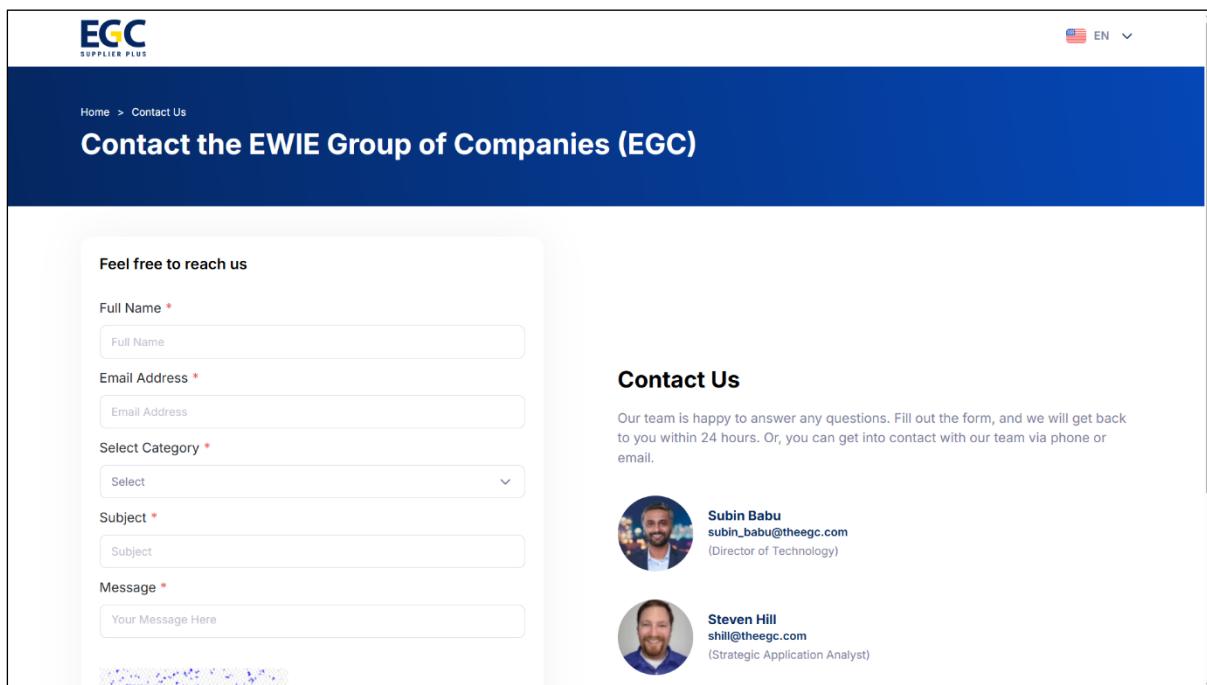
Our dedicated team is ready to assist you with inquiries, partnerships, and collaborations that can elevate your company. Reach out today to explore how we can work together to achieve your goals.

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



Home > Contact Us

Contact the EWIE Group of Companies (EGC)

Feel free to reach us

Full Name *

Email Address *

Select Category *

Subject *

Message *

Subin Babu
subin_babu@theegc.com
(Director of Technology)

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

3. In the screen, do the following:

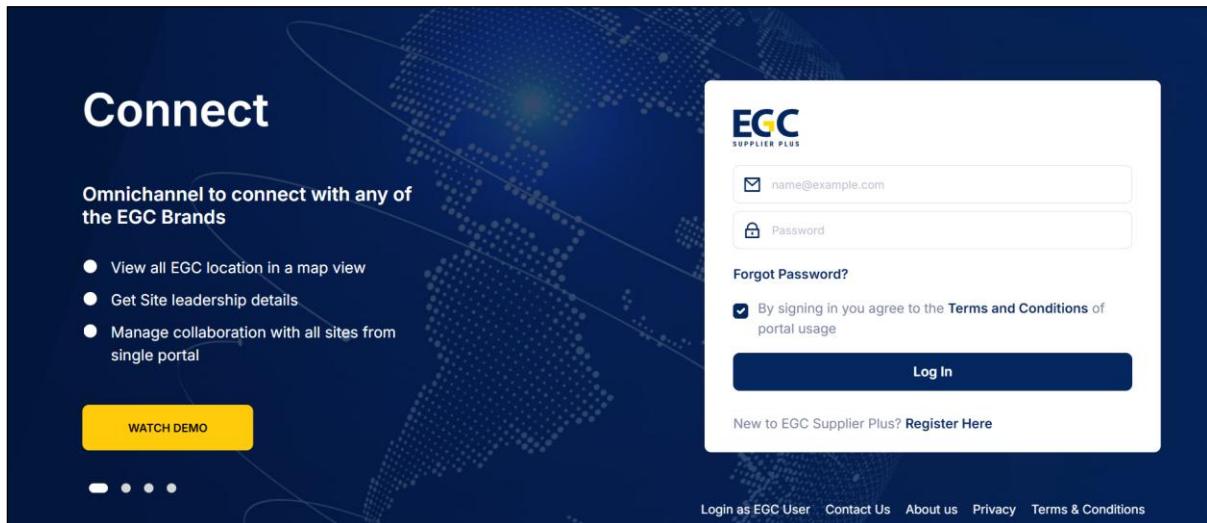
- **Full Name:** Enter the name of the user
- **Email Address:** Enter the email address of the user
- **Select Category:** Select the category/reason for contacting from the drop down list
- **Subject:** Enter the subject for contacting
- **Message:** Enter the message
- **Enter text shown in image**

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



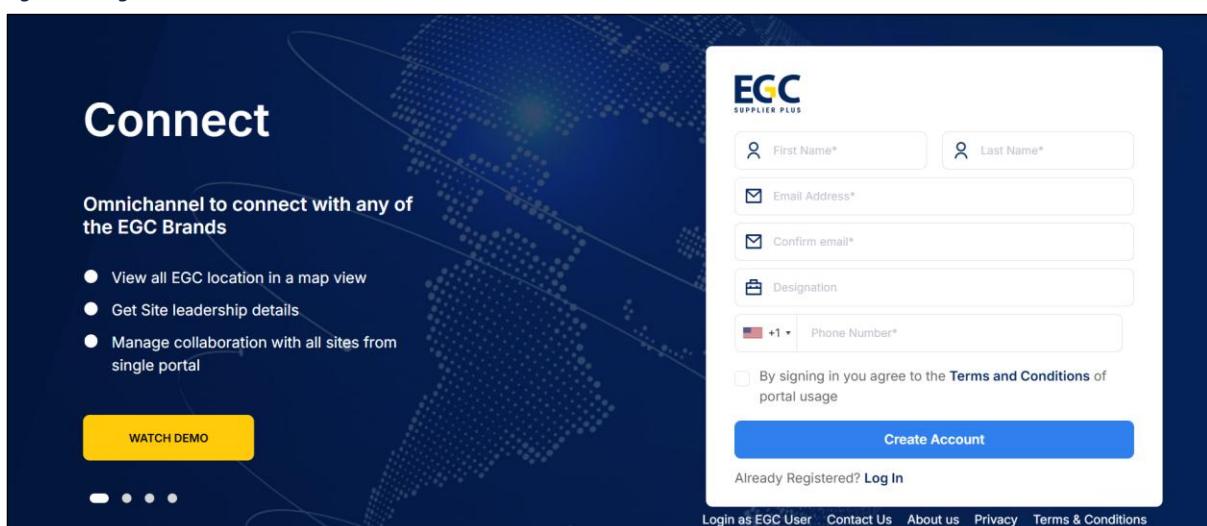
3.1 Sign Up/ Register

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 Kneiding, 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, Sndeep Kmr, Sndeep Rumak, test tc, Mohamed Shahil	

Personal Details

First Name *	Last Name *	Email Address *
test1	test2	test1@
Phone Number *	Designation *	
<input style="width: 20px; height: 20px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-right: 5px;"/> +1 <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-left: 5px;"/>	<input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;"/>	

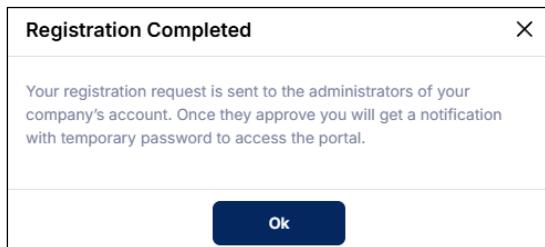
Functional Access

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.

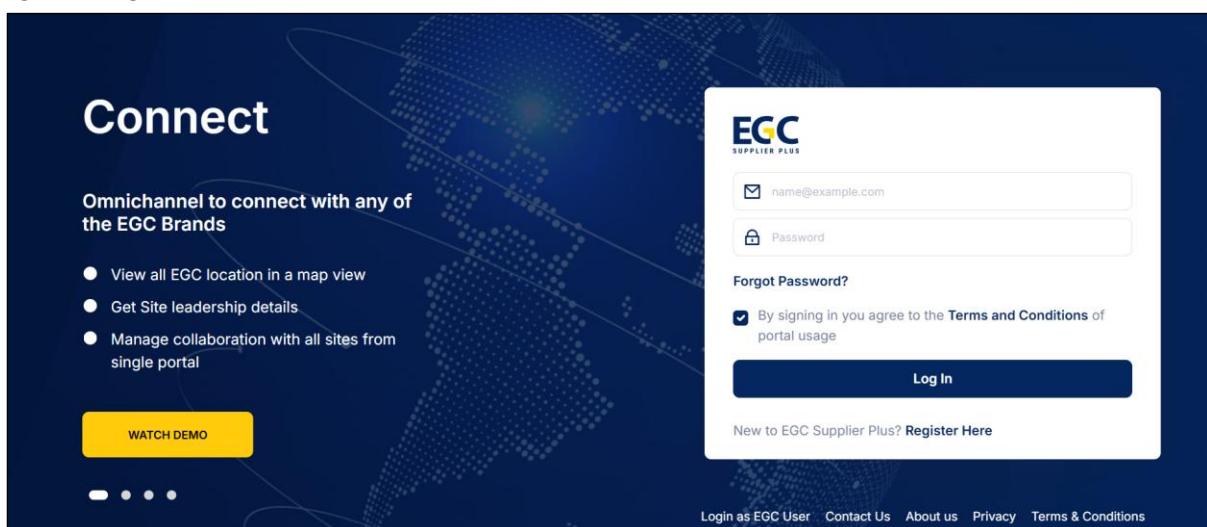
3.2 Sign In

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.



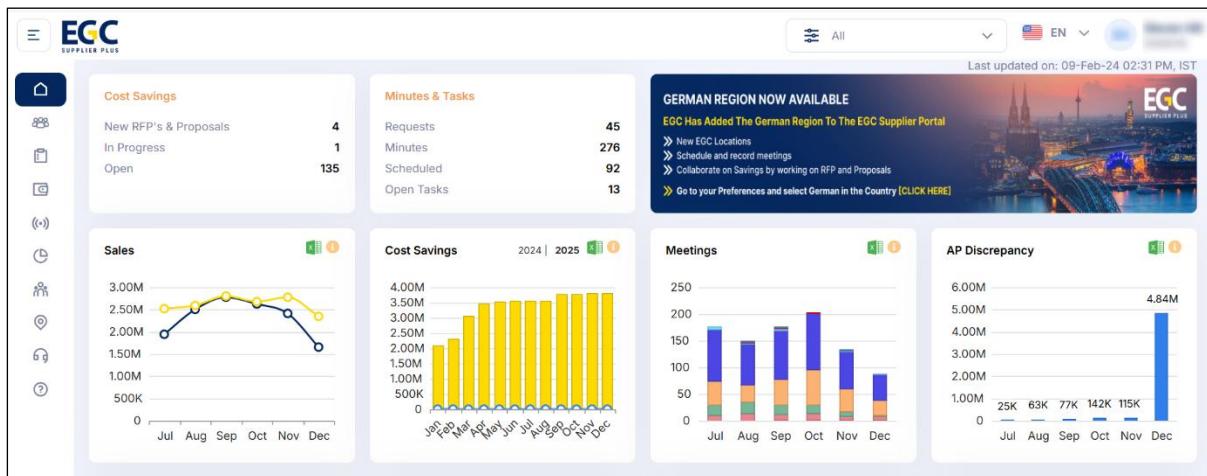
*By default, the **Terms and Conditions** checkbox is enabled. Disabling the checkbox will not allow the user to login.*

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



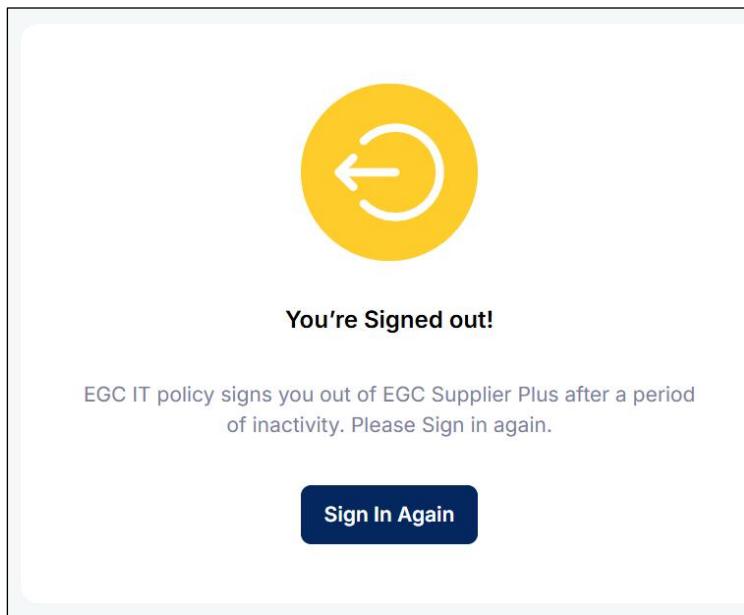
First time user is redirected to the New User Login screen (Refer New user login).

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



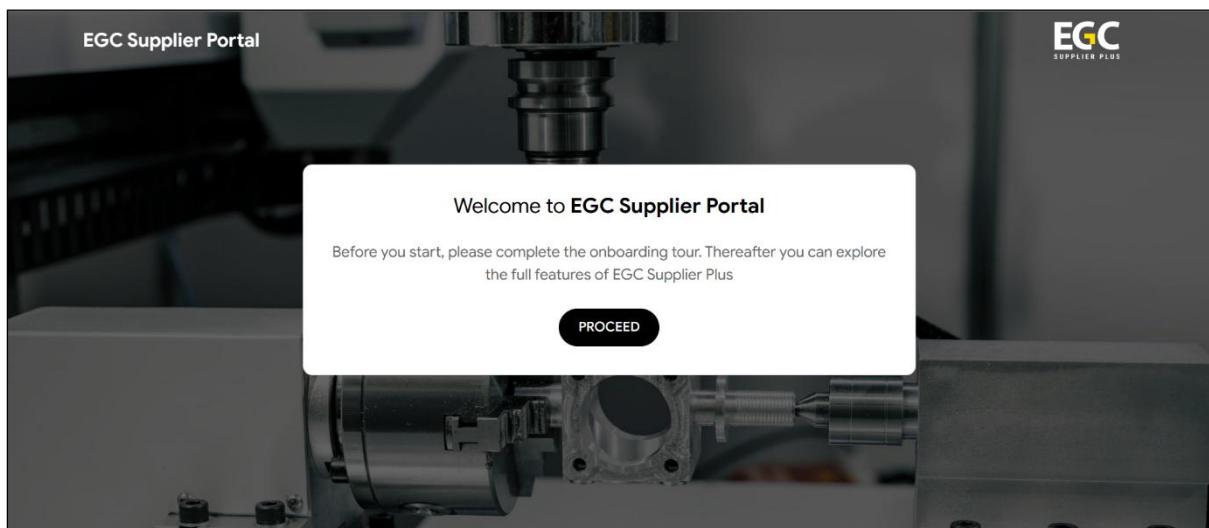
3.3 New user login

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:

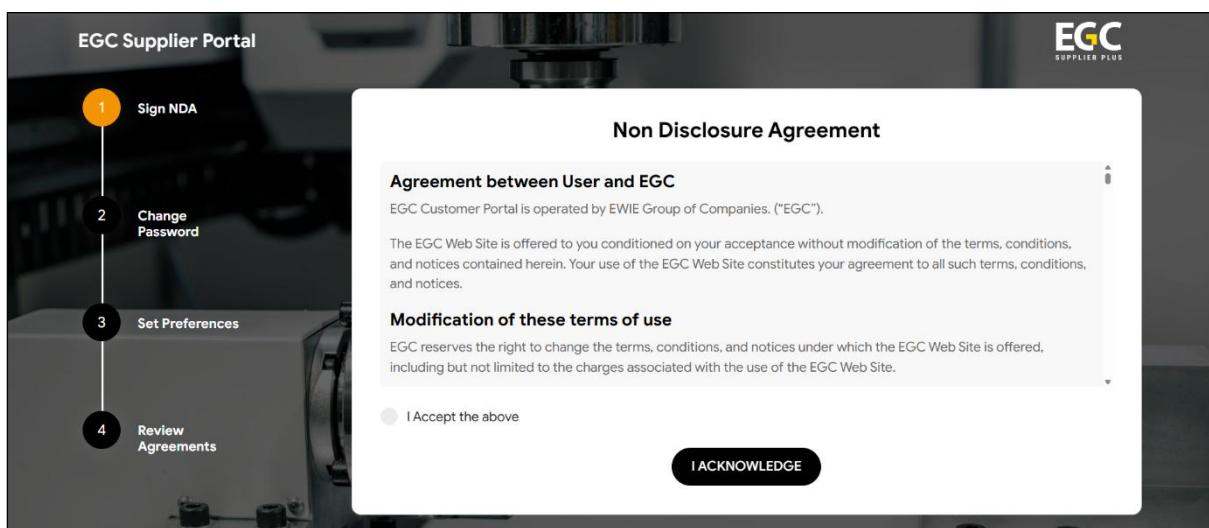
1. Login to the application with the temporary password. The onboarding process landing page is displayed.

Figure 13: Onboarding Welcome screen



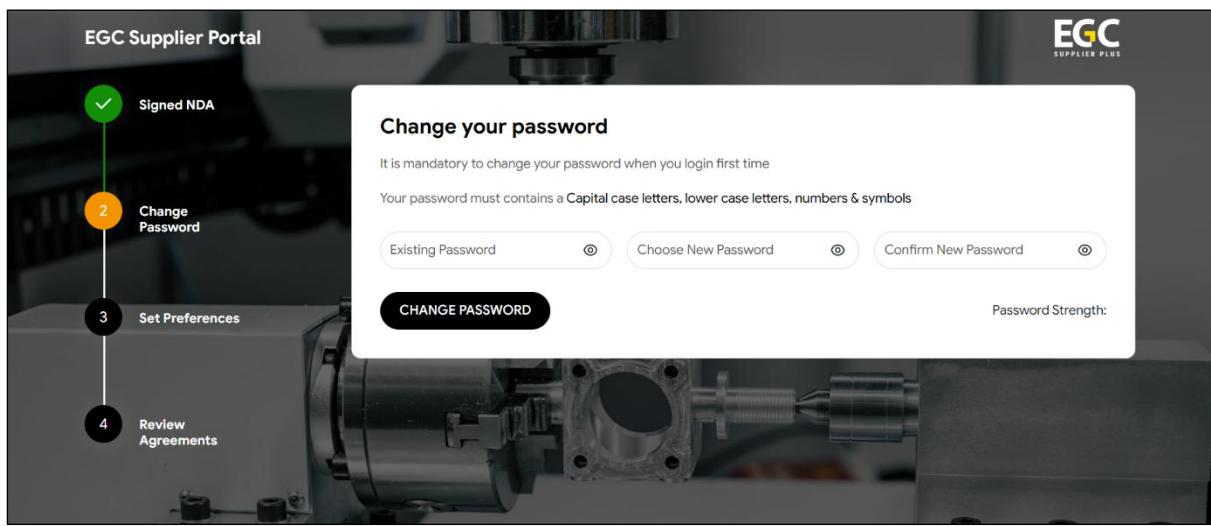
2. Click **PROCEED** to start the onboarding process.

Figure 14: Onboarding-Sign NDA



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

Figure 15: Onboarding-Change Password



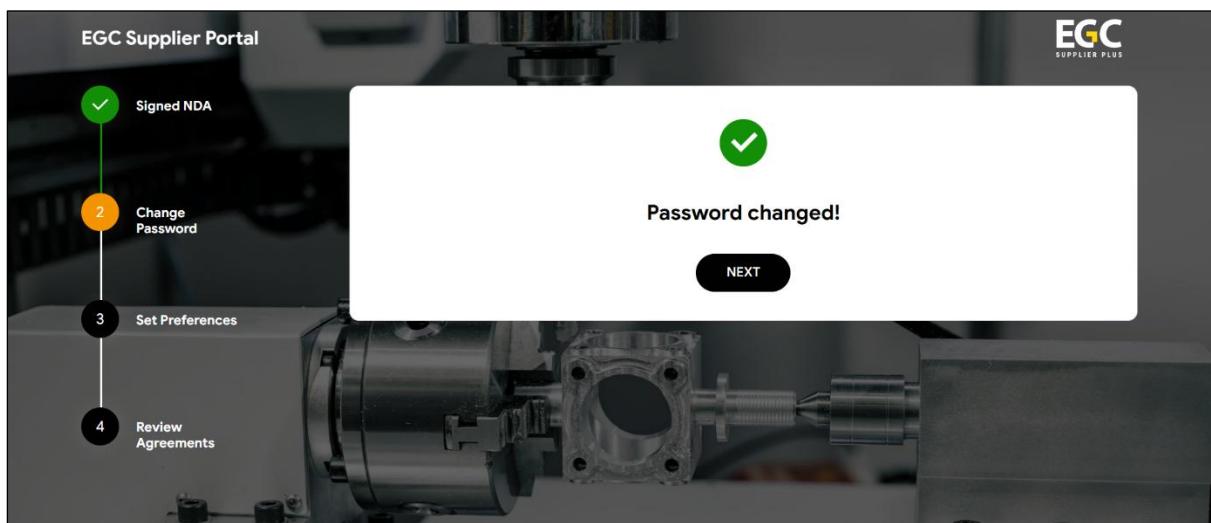
4. Enter the **Existing Password**, **Choose New Password** and **Confirm New Password**.



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

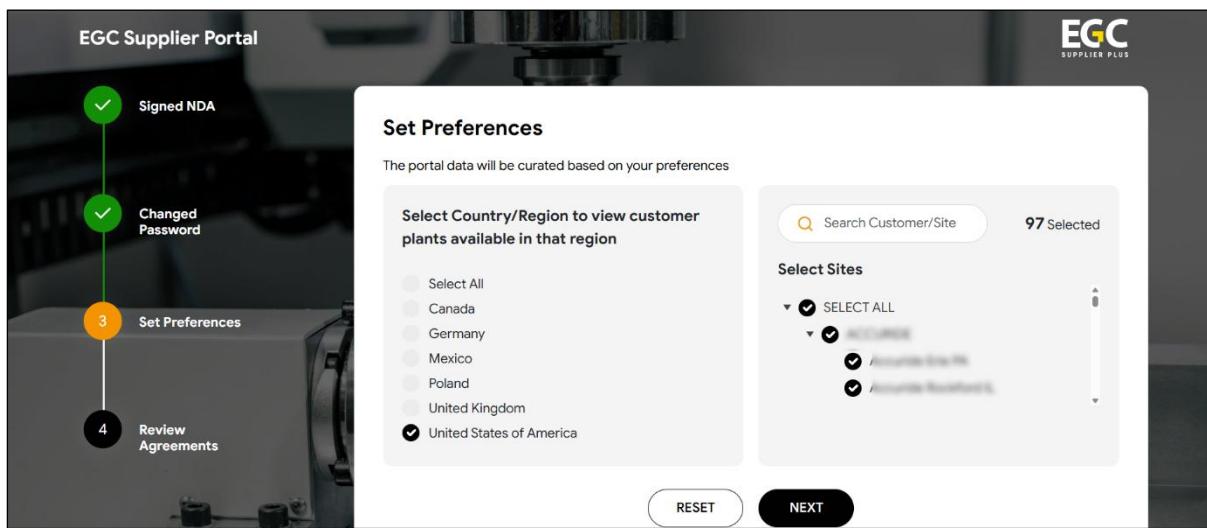
5. Click **Change Password**, the **Password changed!** message is displayed.

Figure 16: Onboarding-Password Changed



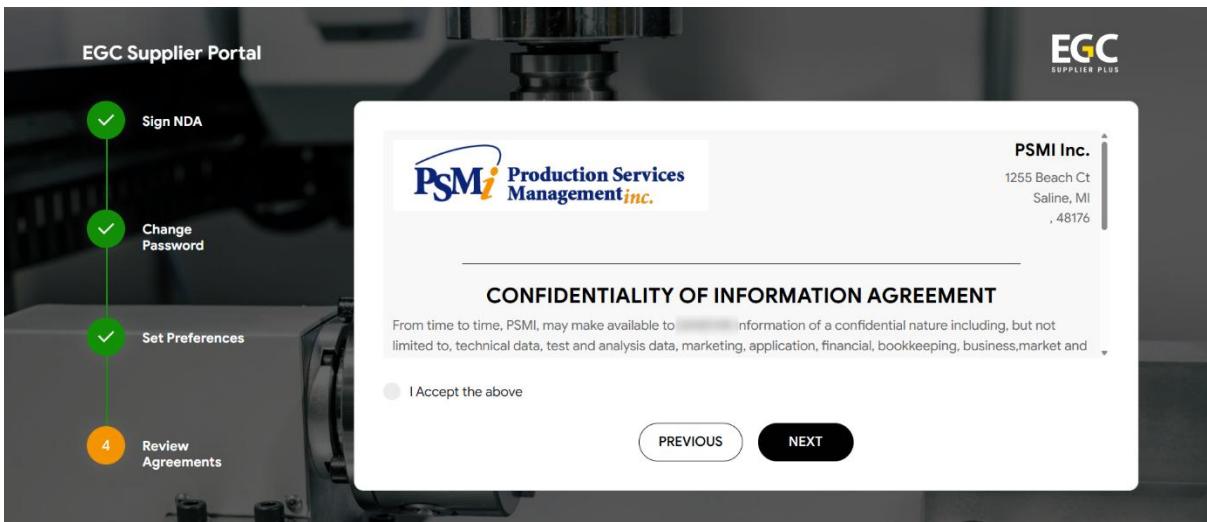
6. Click **Next**, the **Set Preferences** popup is displayed.

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

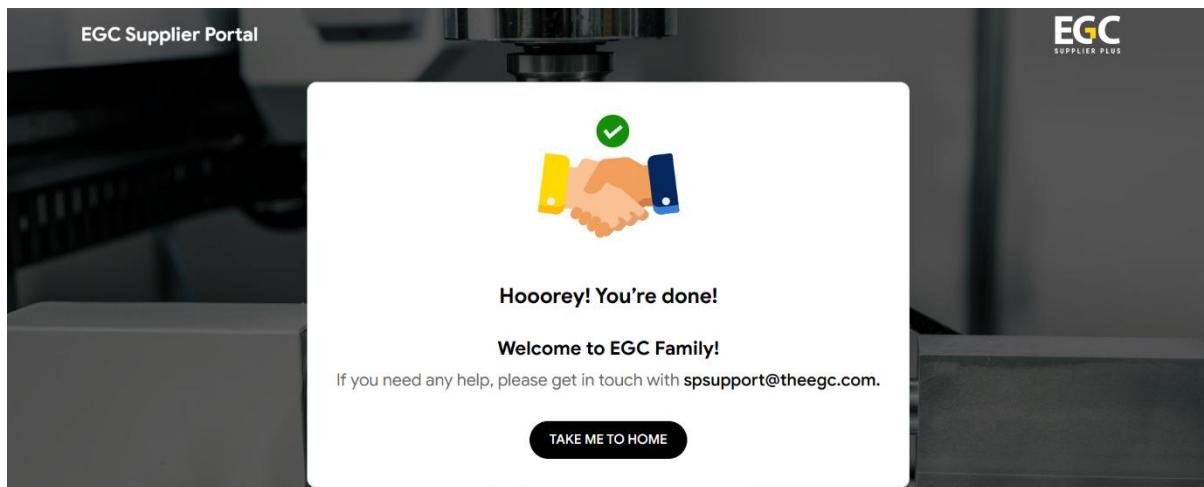


10. Enable **I Accept the above** and click **Next**.



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.

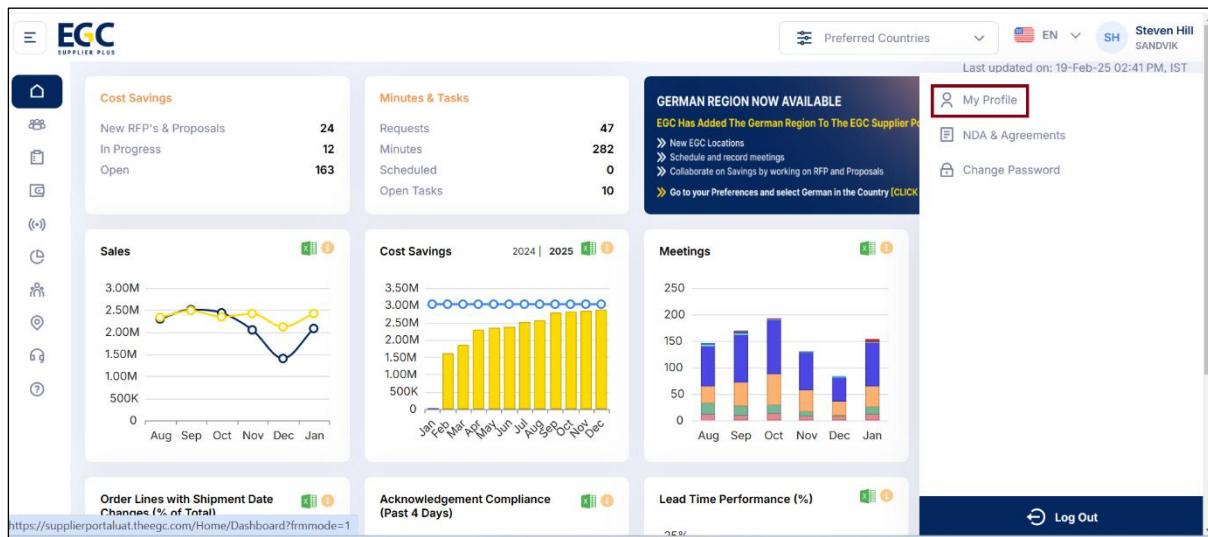
3.4 My Profile

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:

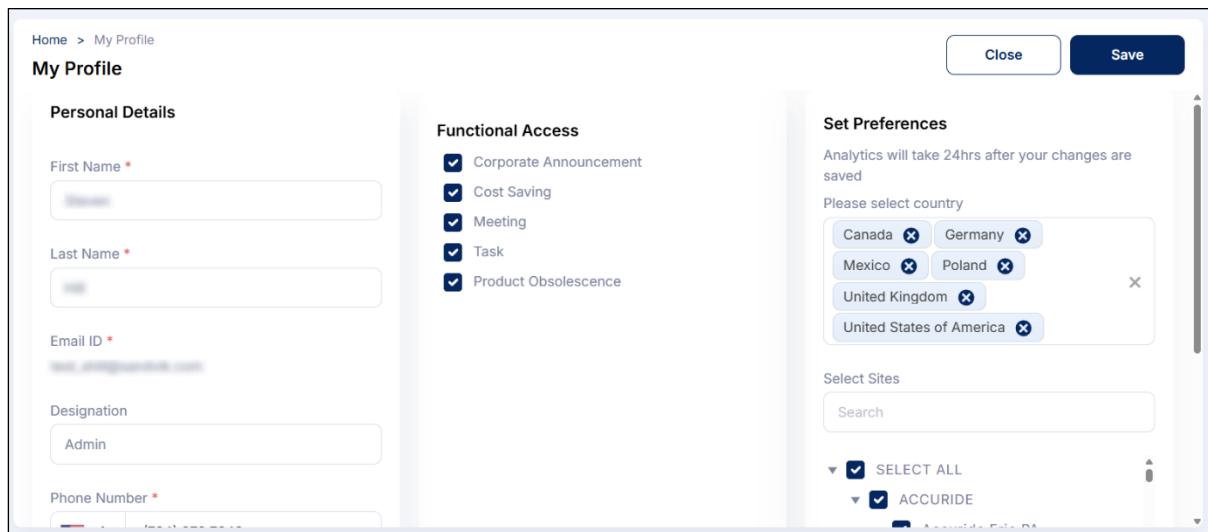
1. Click the username on the top right corner of the screen/ application. The options are displayed.

Figure 21: My Profile - Option



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

Figure 22: My Profile



The 'My Profile' edit screen is divided into three main sections:

- Personal Details:** Fields for First Name, Last Name, Email ID, Designation (Admin), and Phone Number.
- Functional Access:** A list of checked boxes: Corporate Announcement, Cost Saving, Meeting, Task, and Product Obsolescence.
- Set Preferences:** A section for selecting countries (Canada, Germany, Mexico, Poland, United Kingdom, United States of America) and sites.

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**

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

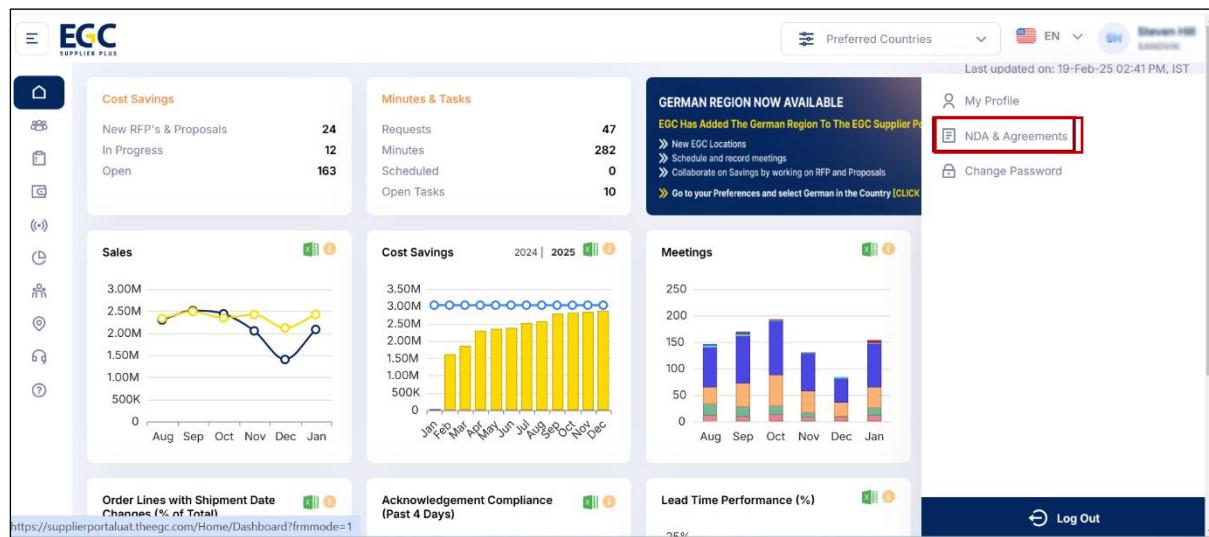
3.5 NDA and Agreements

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:

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

Figure 23: Change Password - option



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

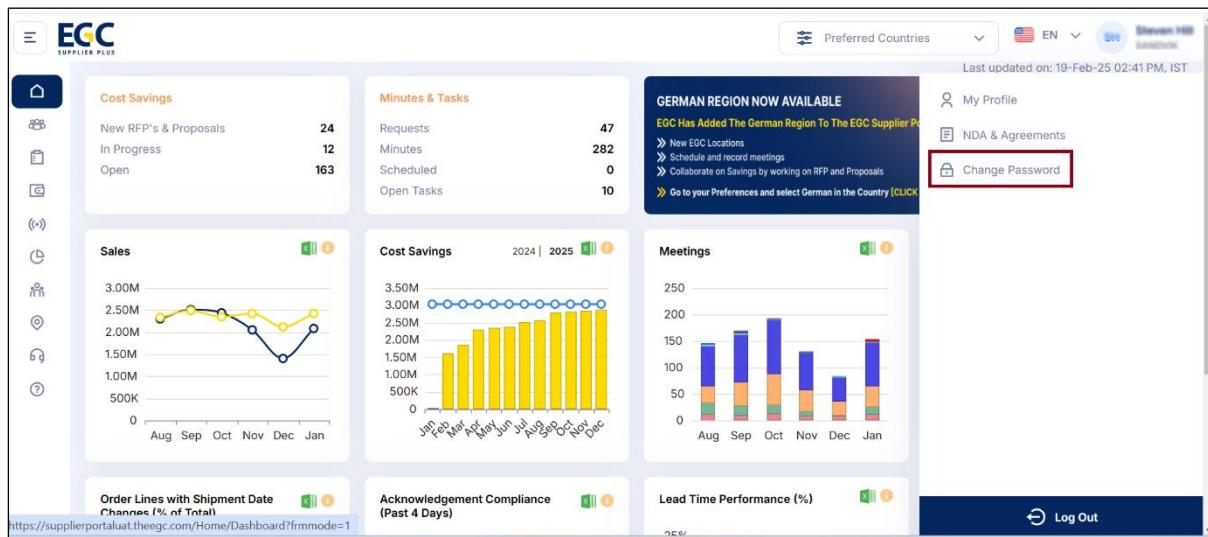
3.6 Change Password

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

To change the application password, do the following:

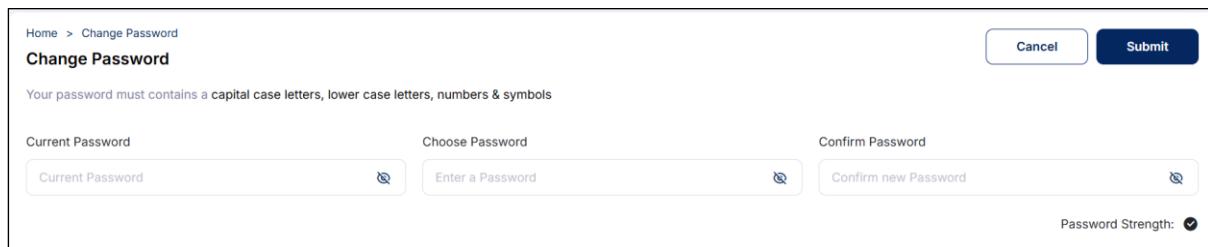
- Click the username on the top right corner of the screen/ application. The options are displayed.

Figure 24: Change Password - option



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

Figure 25: Change Password



The screenshot shows the 'Change Password' form with the following fields:

- Home > Change Password**
- Change Password**
- Current Password:** Placeholder: Current Password.
- Choose Password:** Placeholder: Enter a Password.
- Confirm Password:** Placeholder: Confirm new Password.
- Cancel** and **Submit** buttons.
- Password Strength:** 25% (indicated by a progress bar).

5. 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.

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

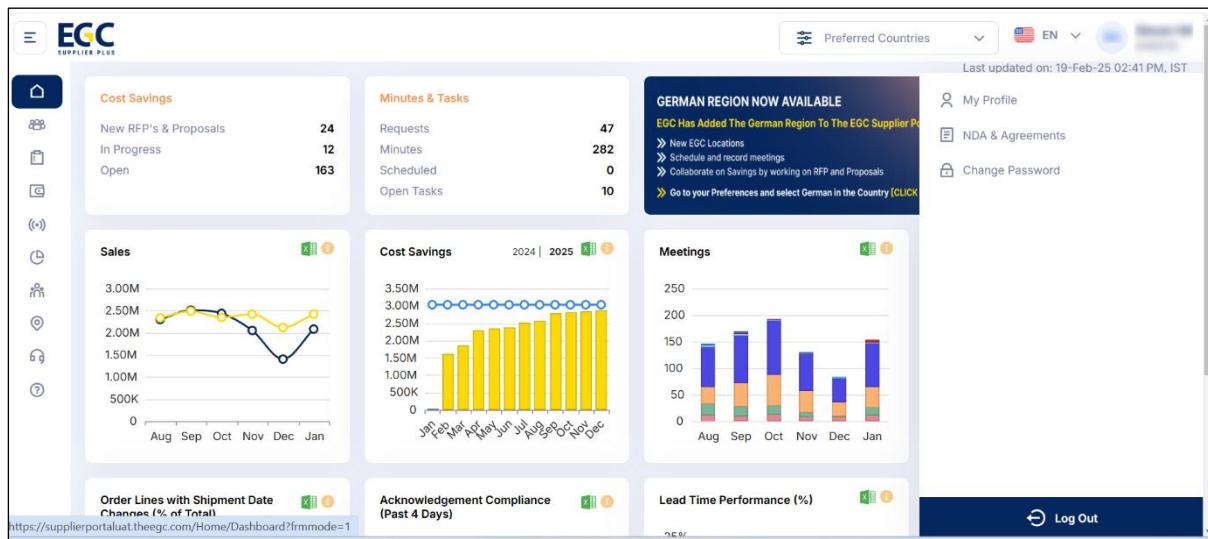
3.7 Sign Out

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

To sign out of the application, follow the instructions:

1. 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



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

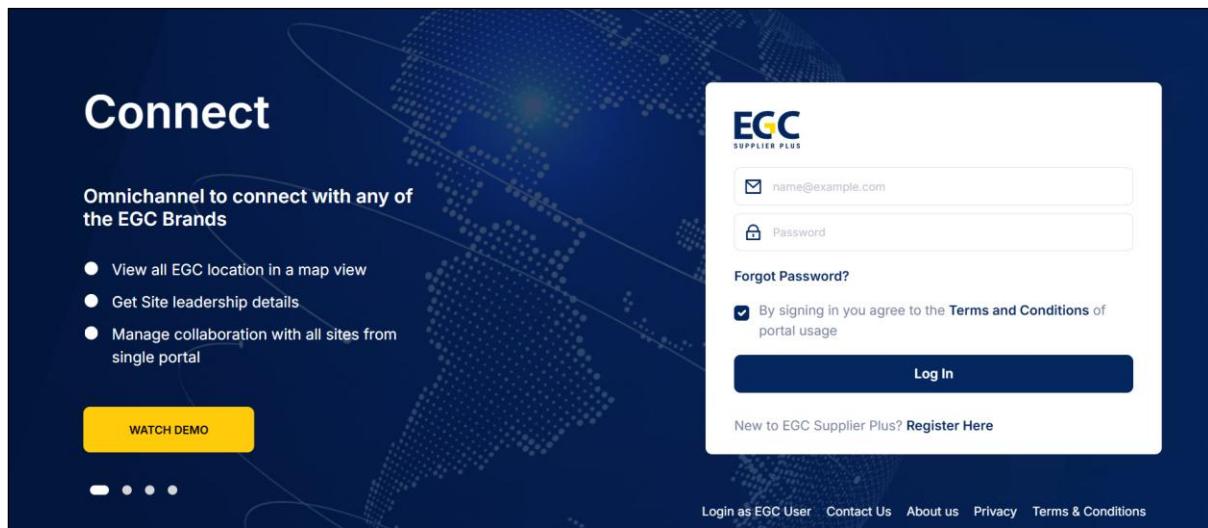
3.8 Forgot Password

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

To reset password, follow the instructions:

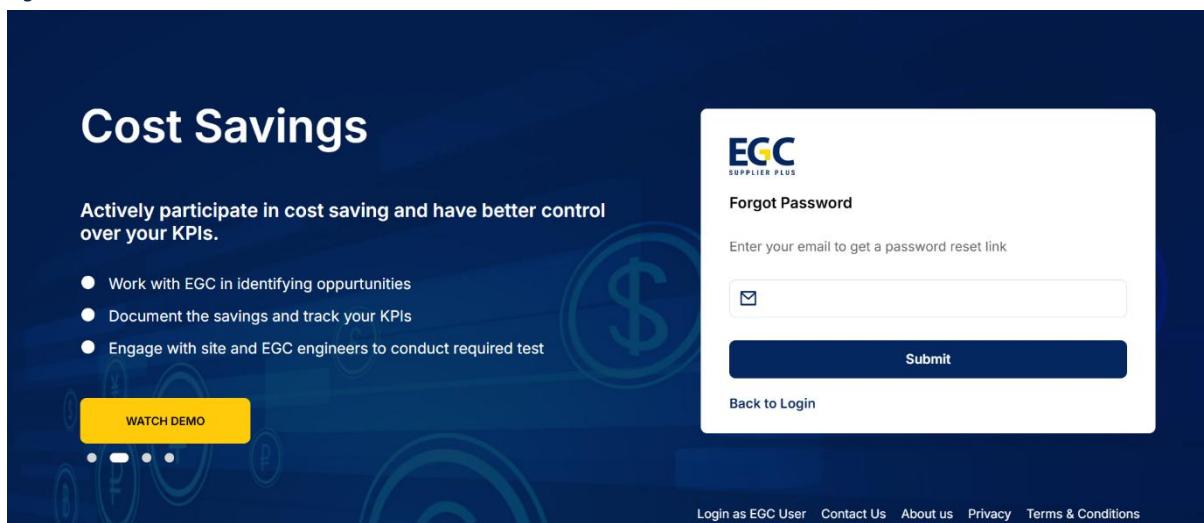
1. Navigate to the supplier portal: <https://supplierportal.theegc.com/>. The login screen is displayed.

Figure 27: Login Screen



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

Figure 28: Reset Password



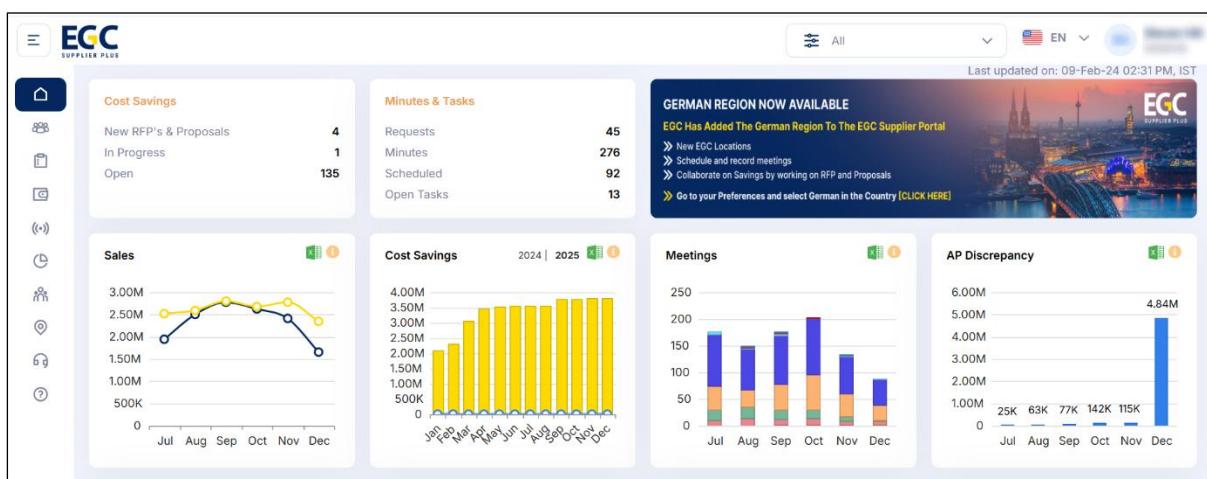
3. Enter the registered email.
4. Click **Submit**. An email with the password reset link is mailed to the registered email address.

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.

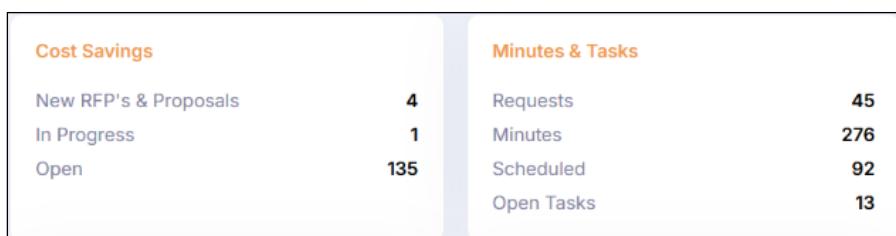
Figure 29: Dashboard



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.

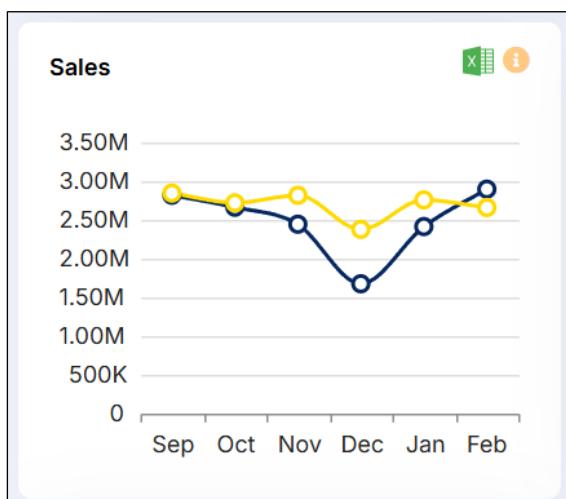
Figure 30: Dashboard



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
	Current year sales data
	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

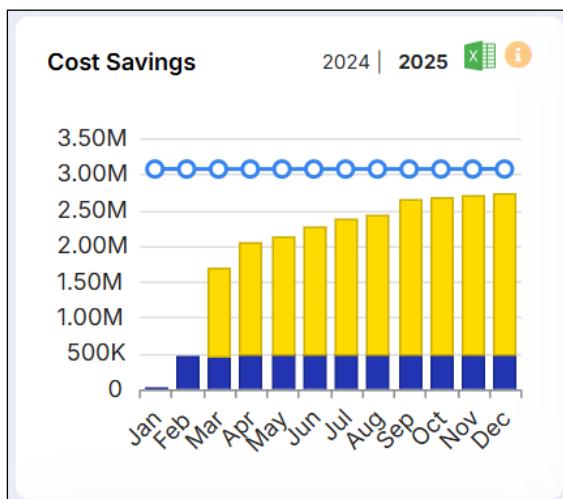


Table 3: Cost Savings graph colour indication

Colour	Description
	Annual target (Based on % of previous year sale)
	Actual realized savings which have been signed off
	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

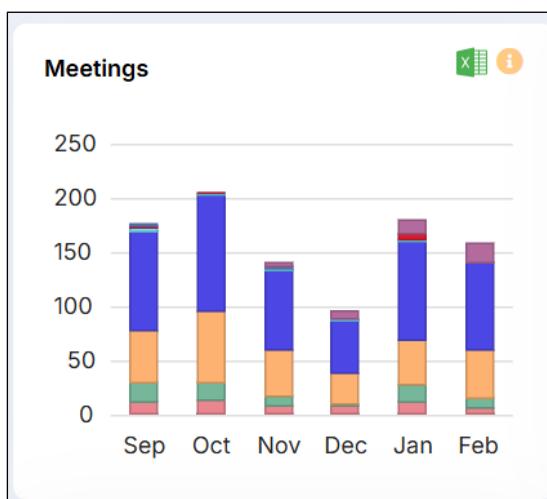


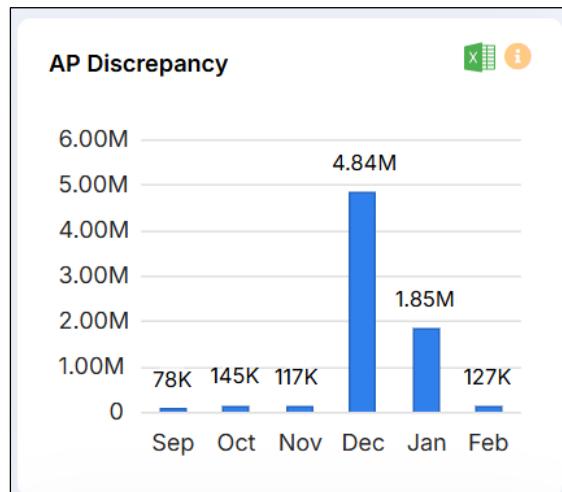
Table 4: Meetings graph colour indication

Colour	Description
Black	Contractual Discussion
Purple	Incident Review
Red	Miscellaneous
Green	New Opportunity
Orange	Project Related Visit
Blue	Support Visit
Cyan	Tool Delivery
Red	Training
Blue	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

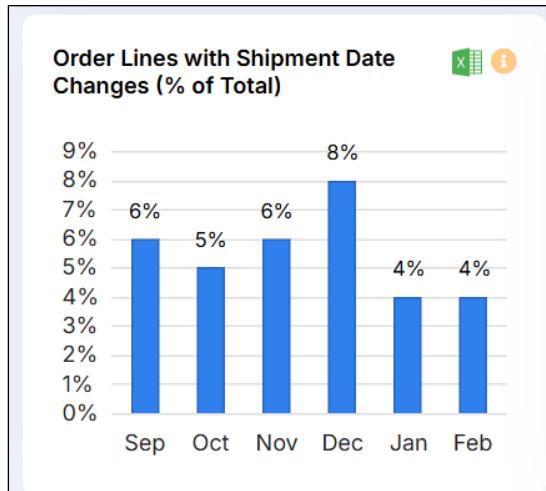


4.5 Order Lines with Shipment Date Changes (% of Total)

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.

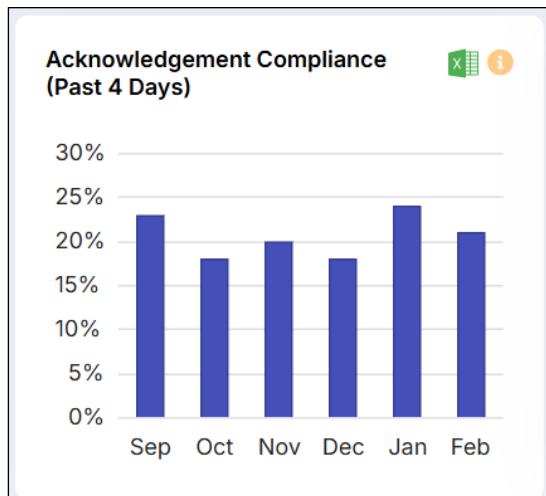
Figure 35: Order lines with change in shipment date



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

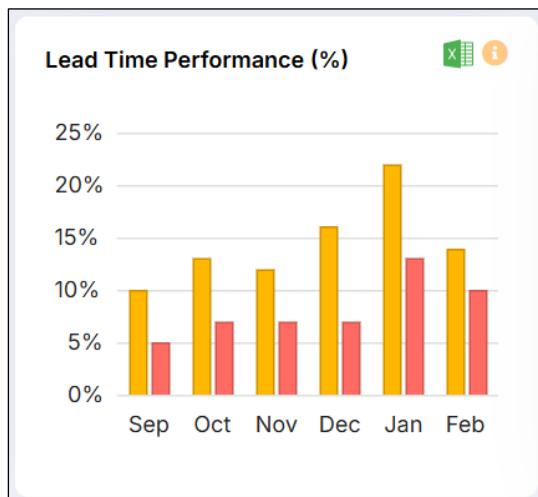


Table 5: Lead Time Performance graph colour indication

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

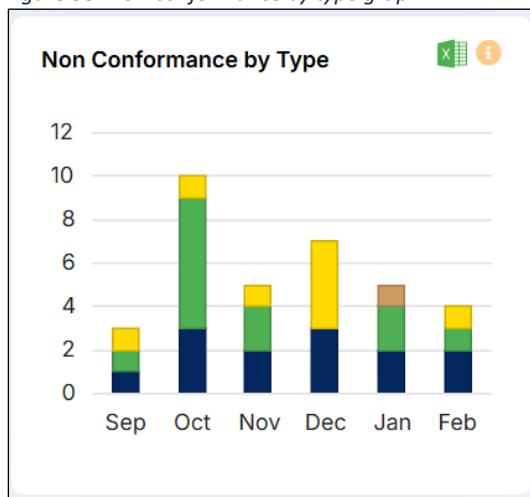


Table 6: Non-Conformance by Type graph colour indication

Colour	Description
Dark Blue	Material Issue
Green	Shipment Issue
Red	Delayed Shipment
Yellow	Incorrect Paperwork
Brown	Transactional Issue
Dark Teal	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.

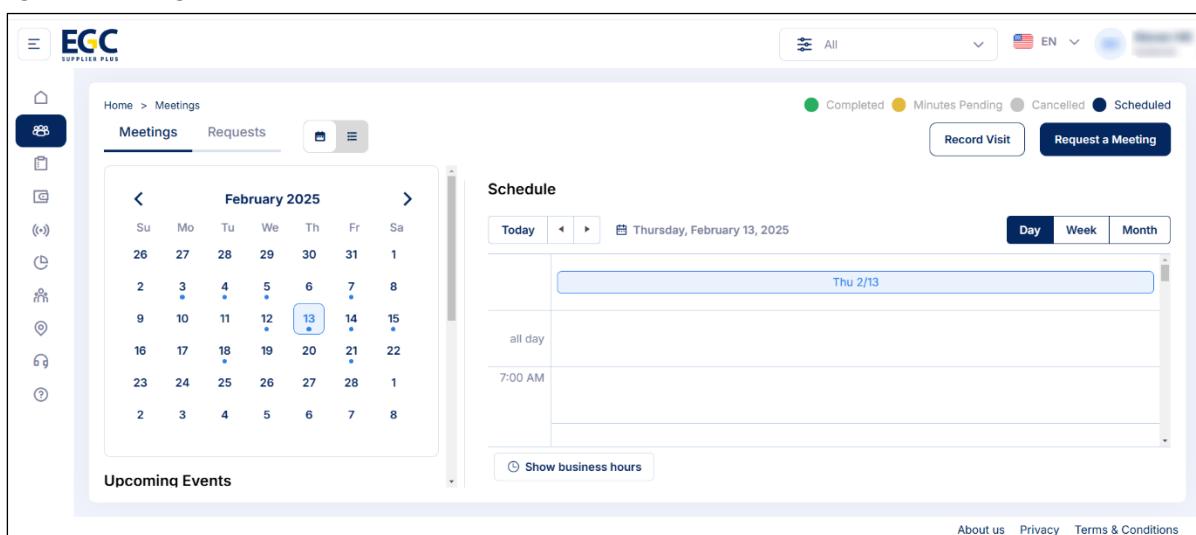
The supplier can request a meeting. The request can be converted into a meeting only when the EGC user accepts the request.

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.

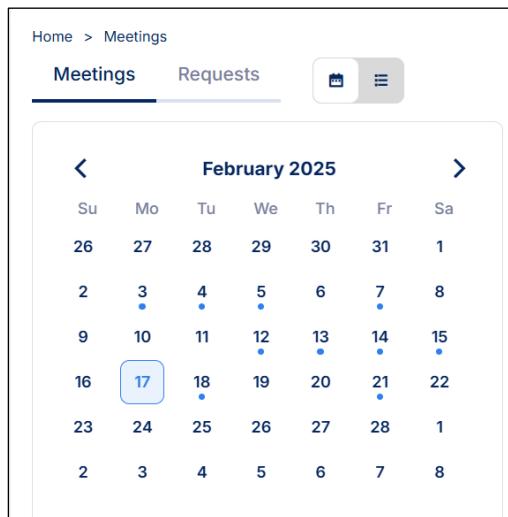
Figure 39: Meetings



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

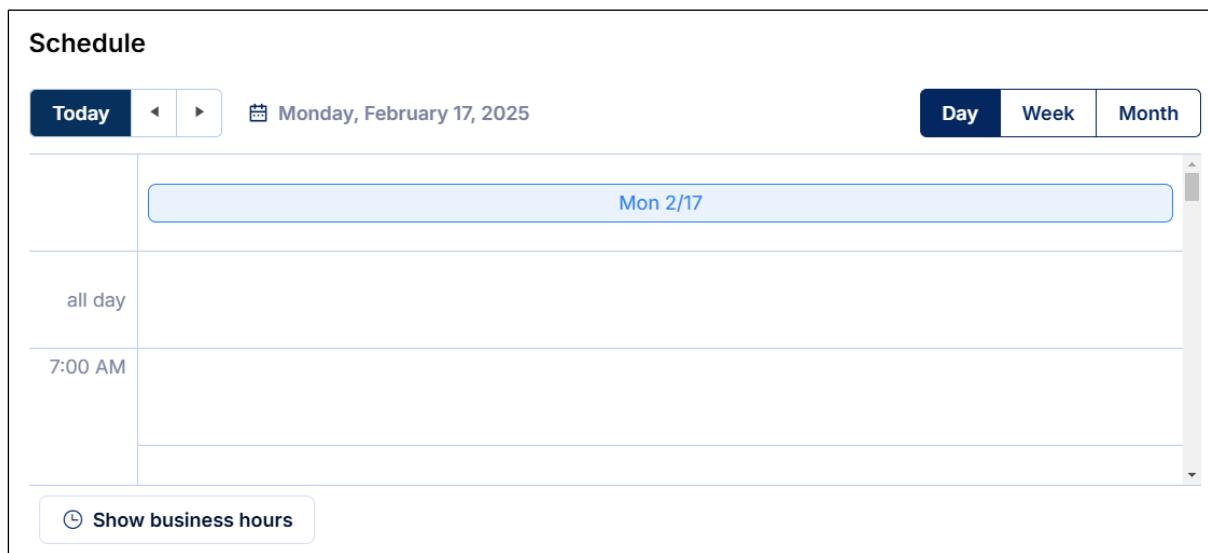
The schedule pane by default displays the current day and the scheduled meetings for the current day.

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

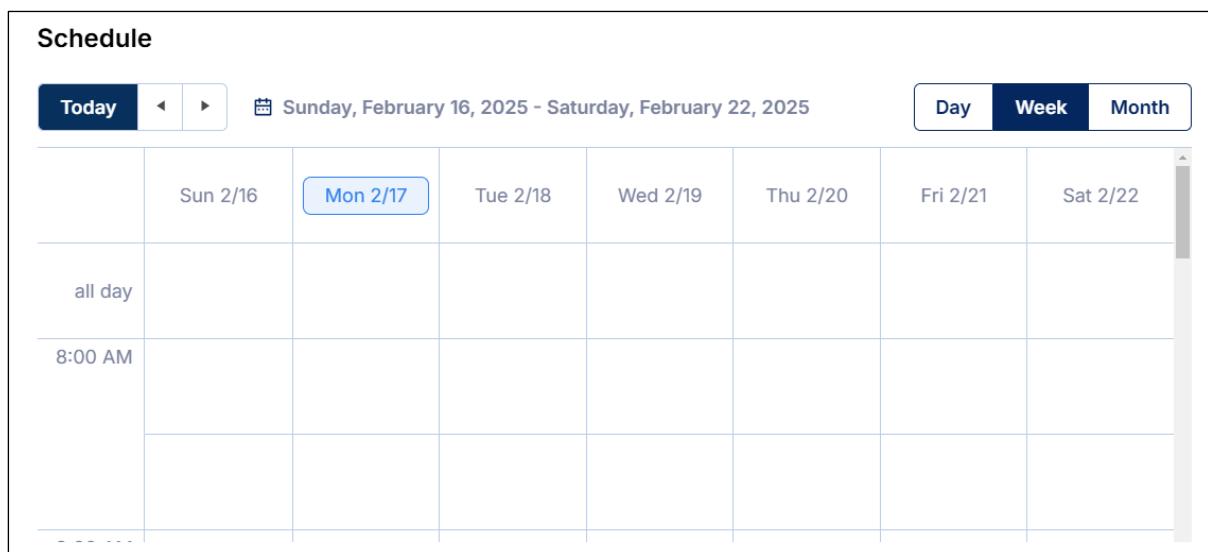
Today ◀ ▶ 📅 Monday, February 17, 2025 Day Week Month

	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



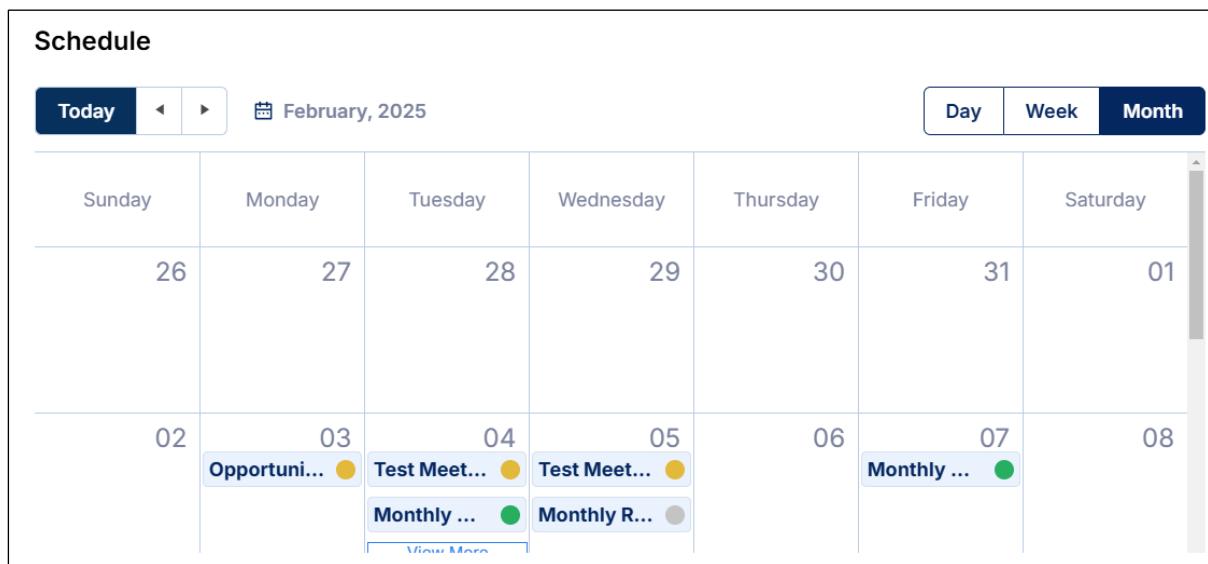
Schedule

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							

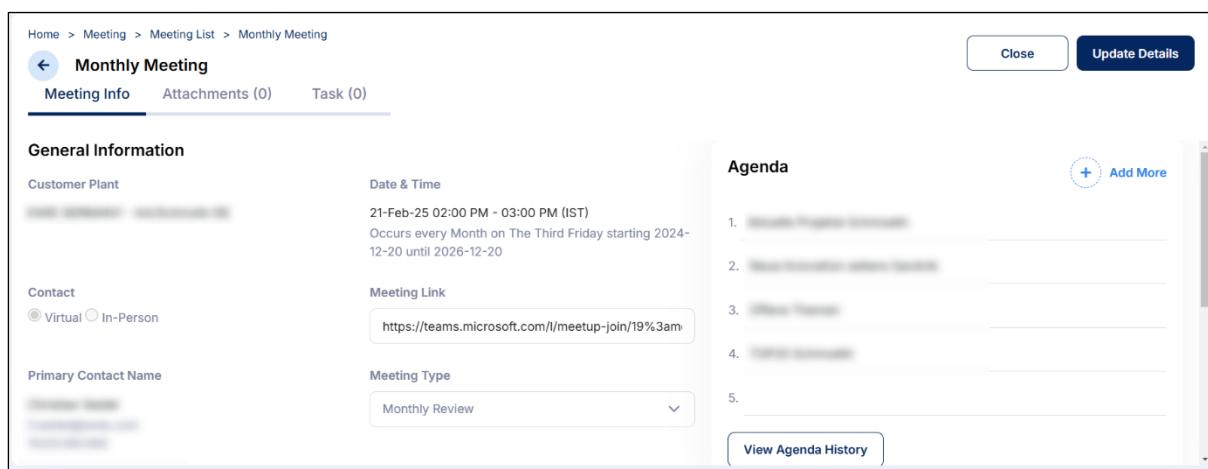
- **Month:** Click **Month** to display the month and the scheduled meetings for the month.

Figure 43: Monthly Schedule



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

Figure 44: Meeting Details

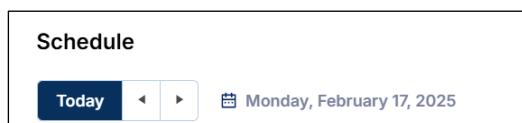


The meeting details are displayed as shown. The meeting details can be updated based on the type of meeting. Refer Meeting List (list view).

Next/Previous

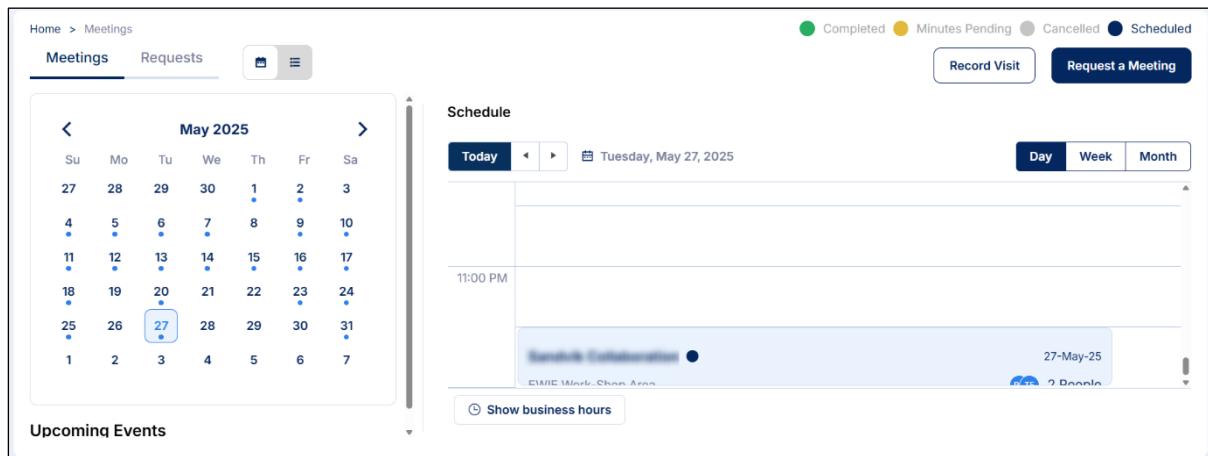
The next and previous symbols in the schedule pane enable to view the next day or week or month based on the view in the schedule pane.

Figure 45: Schedule next/previous



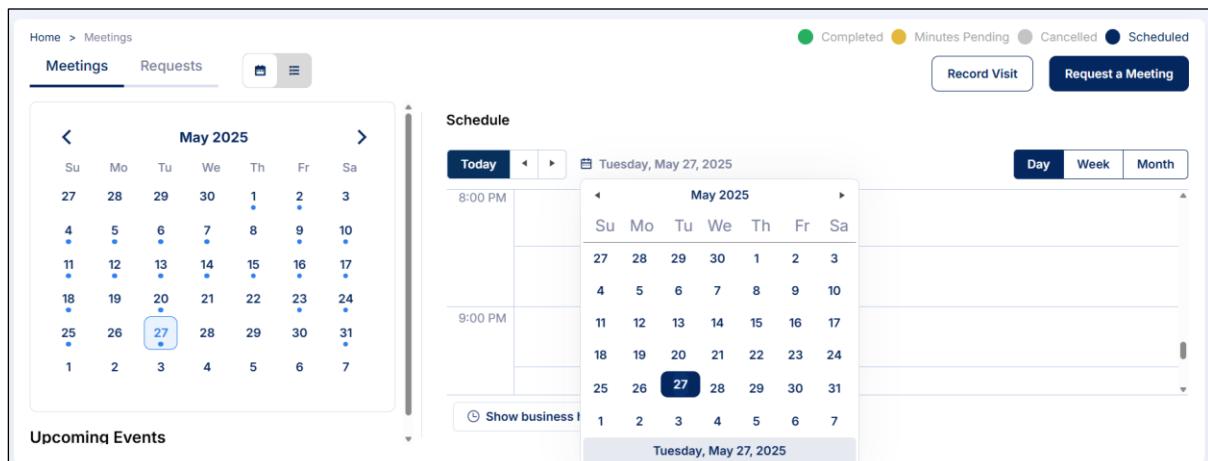
Click **Today** to display the current day and its scheduled meetings.

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

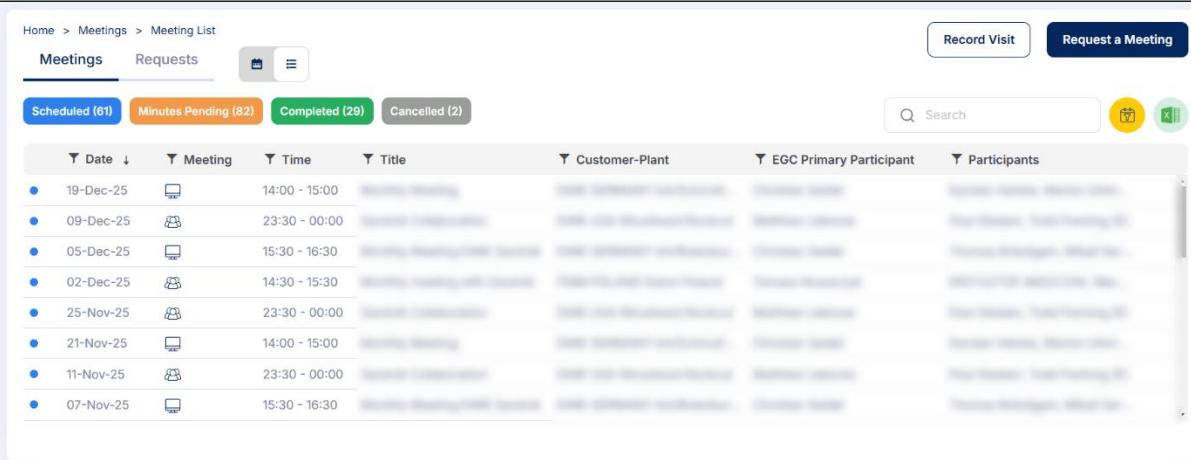


5.2 Meeting List (list view)

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.

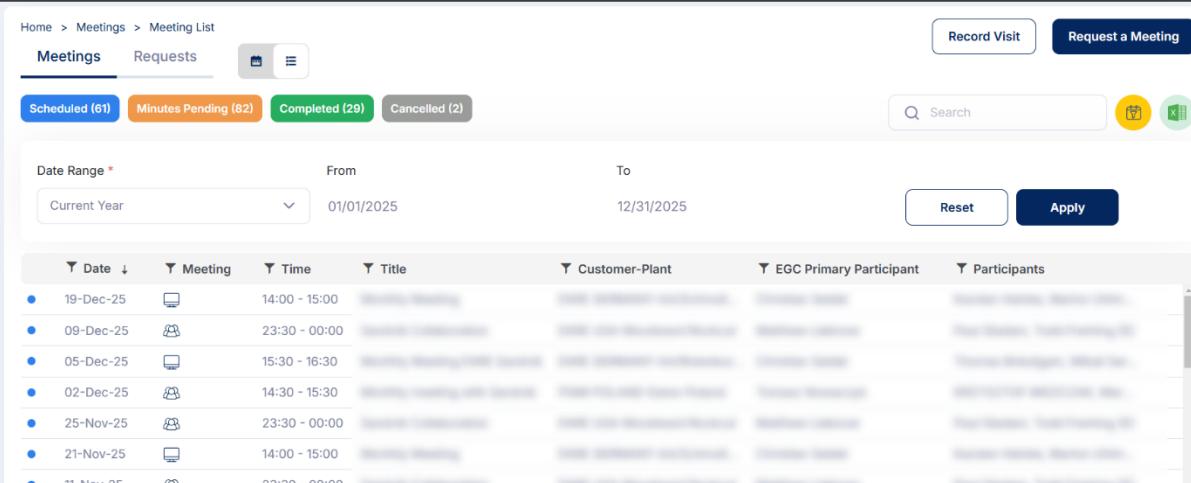
Figure 48: List of meetings



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

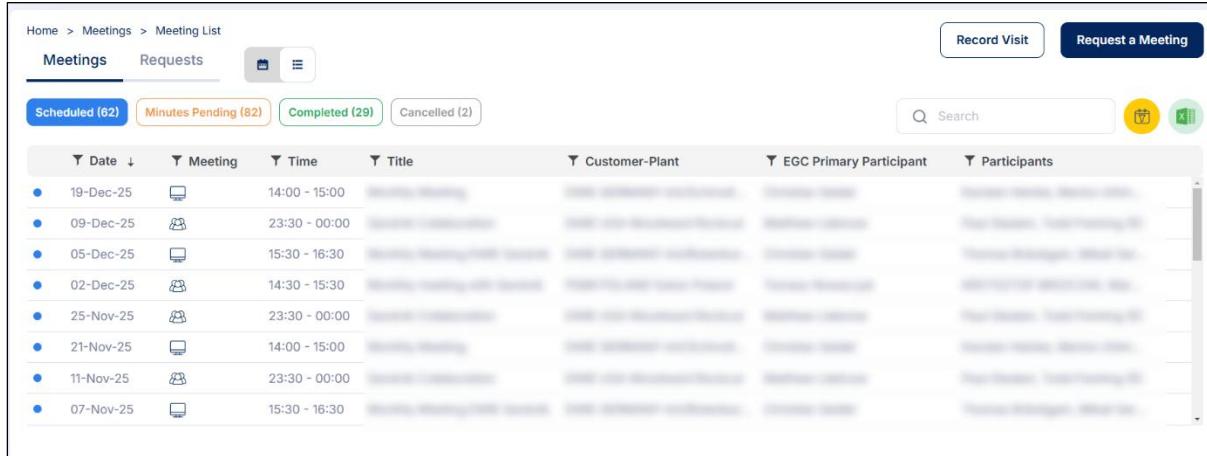


- Click  to export the meeting list to an Excel sheet. The Excel sheet is downloaded to the system.
- Click a specific meeting in the grid to open the meeting details.

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

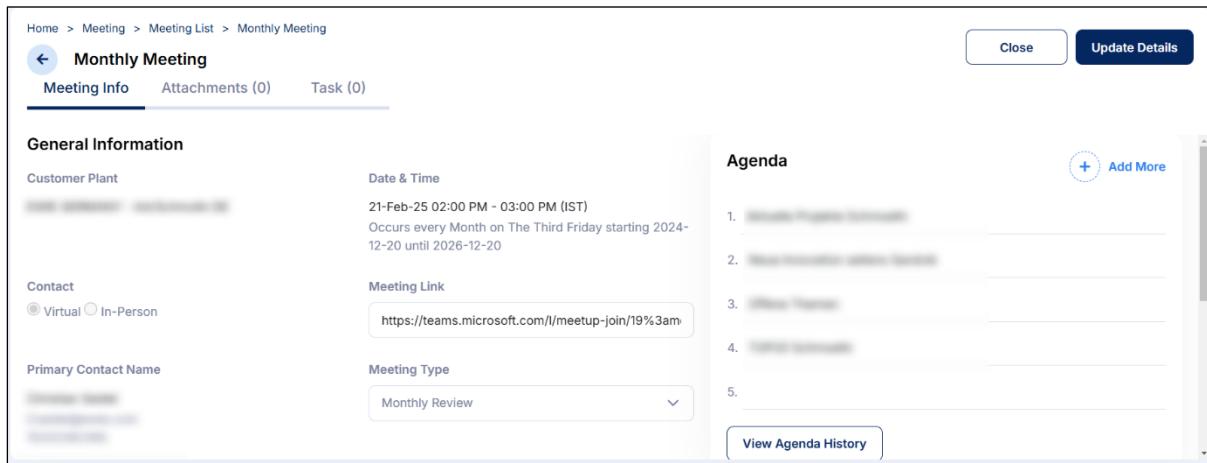


The screenshot shows a grid of scheduled meetings. The columns are: Date, Meeting, Time, Title, Customer-Plant, EGC Primary Participant, and Participants. The 'Scheduled' tab is selected, showing 62 entries. The first few entries are:

Date	Meeting	Time	Title	Customer-Plant	EGC Primary Participant	Participants
19-Dec-25	💻	14:00 - 15:00	[redacted]	[redacted]	[redacted]	[redacted]
09-Dec-25	📞	23:30 - 00:00	[redacted]	[redacted]	[redacted]	[redacted]
05-Dec-25	💻	15:30 - 16:30	[redacted]	[redacted]	[redacted]	[redacted]
02-Dec-25	📞	14:30 - 15:30	[redacted]	[redacted]	[redacted]	[redacted]
25-Nov-25	📞	23:30 - 00:00	[redacted]	[redacted]	[redacted]	[redacted]
21-Nov-25	💻	14:00 - 15:00	[redacted]	[redacted]	[redacted]	[redacted]
11-Nov-25	📞	23:30 - 00:00	[redacted]	[redacted]	[redacted]	[redacted]
07-Nov-25	💻	15:30 - 16:30	[redacted]	[redacted]	[redacted]	[redacted]

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

Figure 51: Scheduled Meeting-Details



The screenshot shows the 'Monthly Meeting' details page. The 'Meeting Info' tab is selected. The page includes sections for General Information, Date & Time, Contact, Primary Contact Name, and an Agenda.

General Information

- Customer Plant:** [redacted]
- 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:** [redacted]
- Meeting Link:** <https://teams.microsoft.com/l/meetup-join/19%3am>
- Meeting Type:** Monthly Review

Agenda

Add More

- 1. [redacted]
- 2. [redacted]
- 3. [redacted]
- 4. [redacted]
- 5. [redacted]

[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.

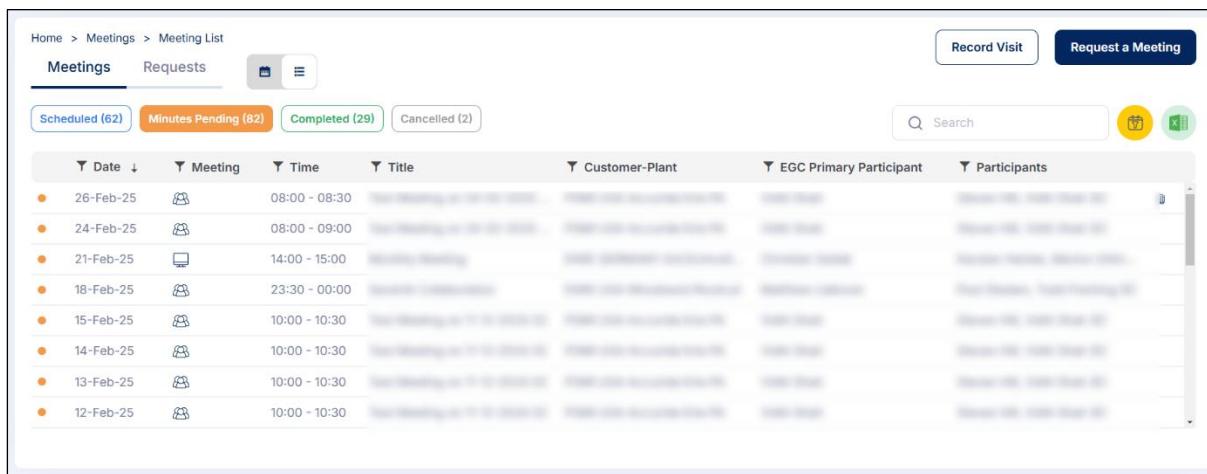
- User can view tasks attached to the meeting in the **Task** tab of the meeting list screen.

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.

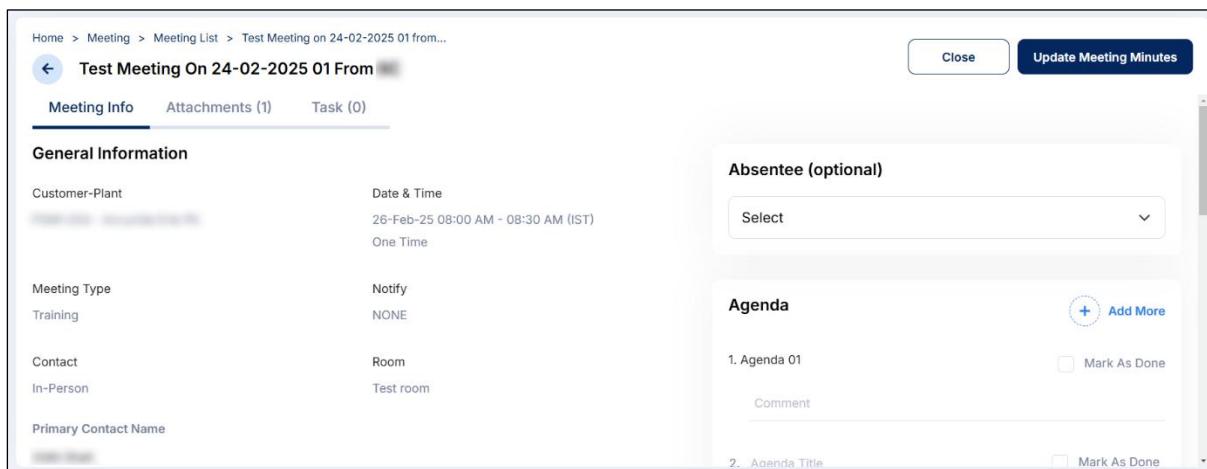
Figure 52: Minutes Pending



Meeting List						
Meetings		Requests		Actions		
Scheduled (62)		Minutes Pending (82)		Completed (29)		Cancelled (2)
Date	Meeting	Time	Title	Customer-Plant	EGC Primary Participant	Participants
26-Feb-25	Online	08:00 - 08:30	Test Meeting on 24-02-2025 01 from...	Customer-Plant	EGC Primary Participant	Participants
24-Feb-25	Online	08:00 - 09:00	Test Meeting on 24-02-2025 01 from...	Customer-Plant	EGC Primary Participant	Participants
21-Feb-25	Online	14:00 - 15:00	Test Meeting on 24-02-2025 01 from...	Customer-Plant	EGC Primary Participant	Participants
18-Feb-25	Online	23:30 - 00:00	Test Meeting on 24-02-2025 01 from...	Customer-Plant	EGC Primary Participant	Participants
15-Feb-25	Online	10:00 - 10:30	Test Meeting on 24-02-2025 01 from...	Customer-Plant	EGC Primary Participant	Participants
14-Feb-25	Online	10:00 - 10:30	Test Meeting on 24-02-2025 01 from...	Customer-Plant	EGC Primary Participant	Participants
13-Feb-25	Online	10:00 - 10:30	Test Meeting on 24-02-2025 01 from...	Customer-Plant	EGC Primary Participant	Participants
12-Feb-25	Online	10:00 - 10:30	Test Meeting on 24-02-2025 01 from...	Customer-Plant	EGC Primary Participant	Participants

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

Figure 53: Minutes Pending-Meeting Details



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

Meeting Info

General Information

Customer-Plant	Date & Time
Customer-Plant	26-Feb-25 08:00 AM - 08:30 AM (IST)
Meeting Type	Notify
Training	NONE
Contact	Room
In-Person	Test room
Primary Contact Name	

Absentee (optional)

Agenda

1. Agenda 01

2. Agenda Title

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.

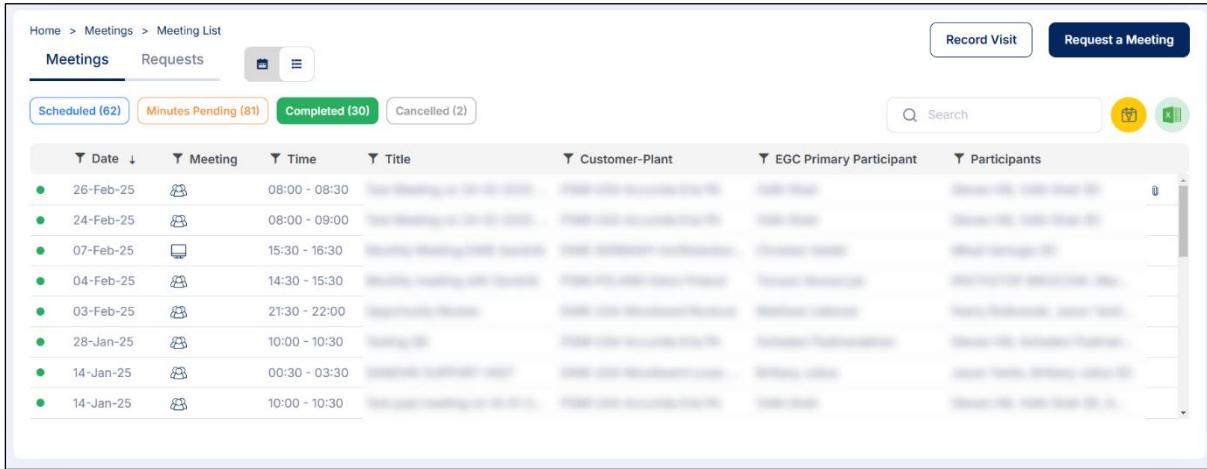
- Click **Add More** to add a new agenda.
- Click **Add New** to add an attendee who was not in the list.
- Click **New Attachment** in the **Attachment** tab to add an attachment pertaining to the meeting.
- Tasks assigned to the meeting can be viewed in the **Task** tab of the screen.

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.

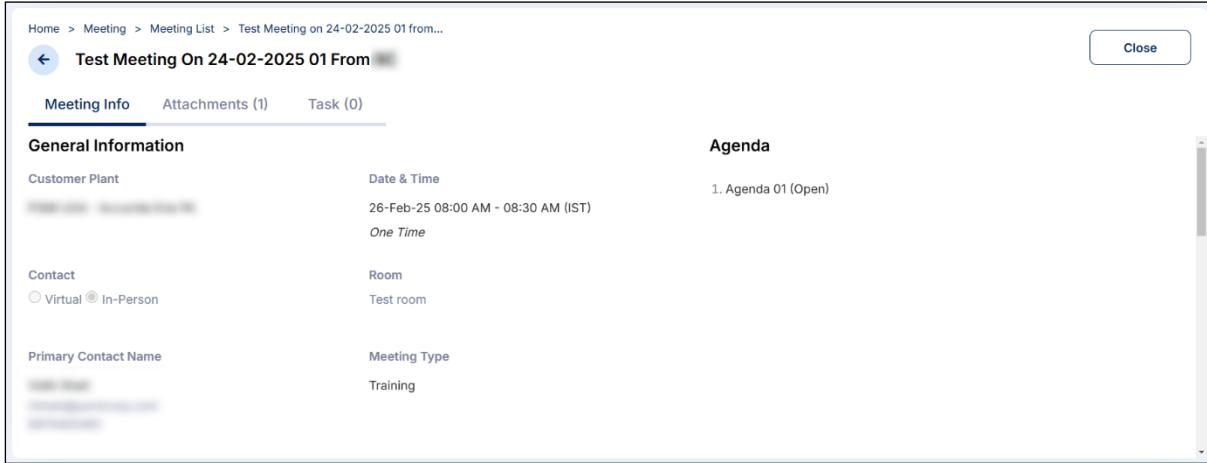
Figure 54: Completed



Date	Meeting	Time	Title	Customer-Plant	EGC Primary Participant	Participants
26-Feb-25	26-Feb-25	08:00 - 08:30				
24-Feb-25	24-Feb-25	08:00 - 09:00				
07-Feb-25	07-Feb-25	15:30 - 16:30				
04-Feb-25	04-Feb-25	14:30 - 15:30				
03-Feb-25	03-Feb-25	21:30 - 22:00				
28-Jan-25	28-Jan-25	10:00 - 10:30				
14-Jan-25	14-Jan-25	00:30 - 03:30				
14-Jan-25	14-Jan-25	10:00 - 10:30				

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

Figure 55: Completed-Meeting Details



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

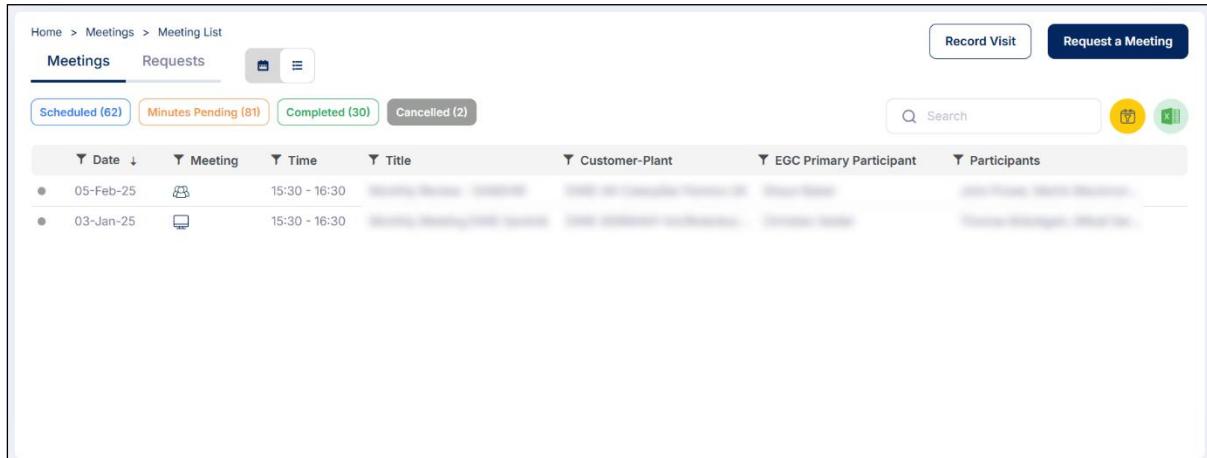
- View meeting information

- 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

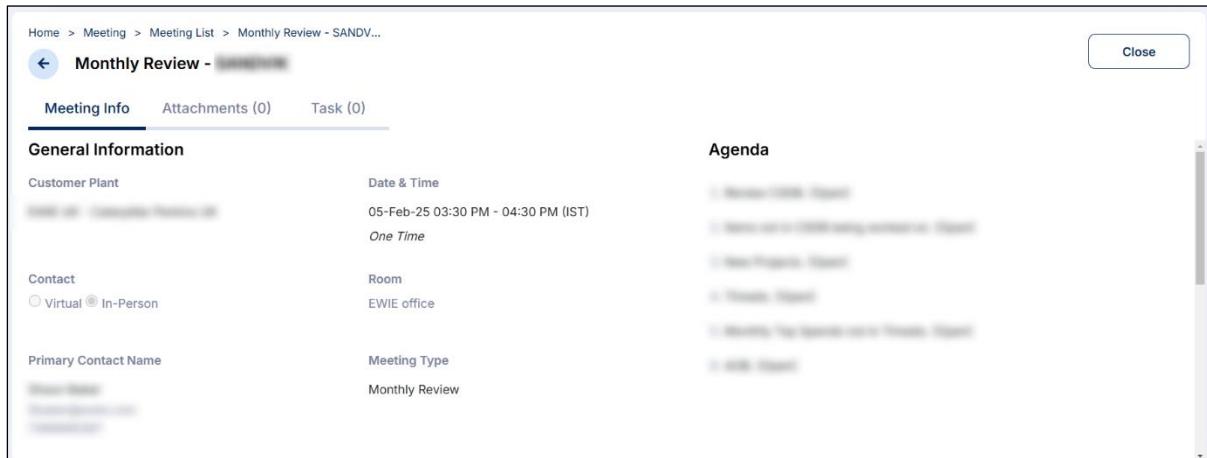


The screenshot shows the 'Meeting List' screen with the 'Cancelled' tab selected. The list displays two entries:

Date	Meeting	Time	Title	Customer-Plant	EGC Primary Participant	Participants
05-Feb-25		15:30 - 16:30	Cancelled Meeting	Customer-Plant	EGC Primary Participant	Participants
03-Jan-25		15:30 - 16:30	Cancelled Meeting	Customer-Plant	EGC Primary Participant	Participants

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

Figure 57: Cancelled-Meeting Details



The screenshot shows the 'Meeting Details' screen for a 'Monthly Review' meeting. The 'General Information' tab is selected, displaying the following details:

Customer Plant	Date & Time
SANDVIK	05-Feb-25 03:30 PM - 04:30 PM (IST) One Time
Contact	Room
<input type="radio"/> Virtual <input checked="" type="radio"/> In-Person	EWIE office
Primary Contact Name	Meeting Type
	Monthly Review

The 'Agenda' tab lists the following items:

- 1. Welcome (00:00:00)
- 2. Review of last month's progress (00:00:00)
- 3. New Projects (00:00:00)
- 4. Risks (00:00:00)
- 5. Monthly Performance Review (00:00:00)
- 6. Q&A (00:00:00)

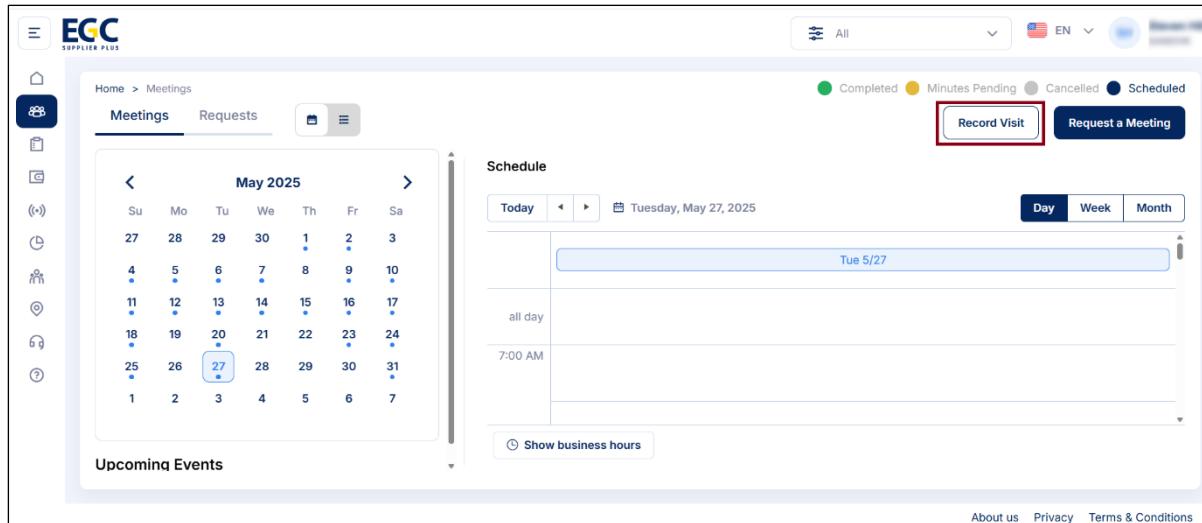
5.3 Record Visit

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:

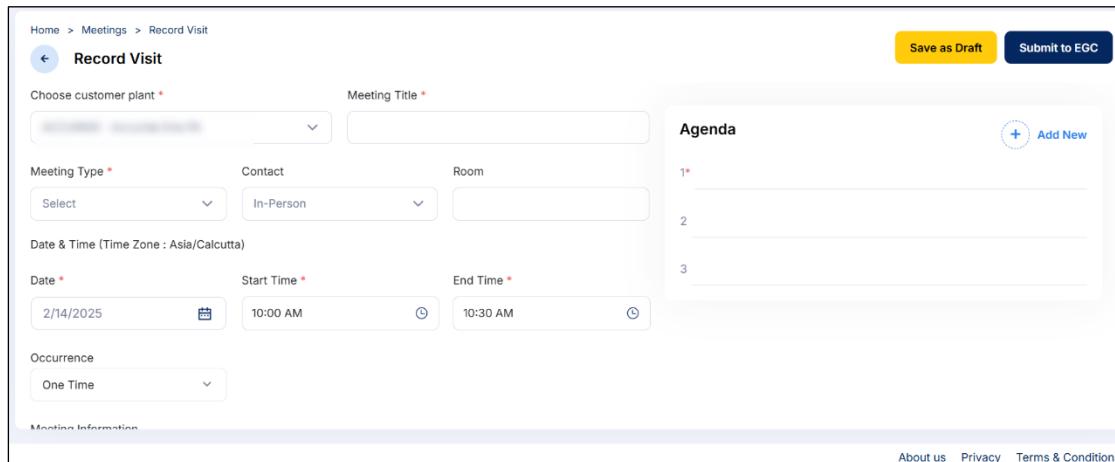
1. Sign in to the EGC Supplier Plus application. The Dashboard screen is displayed.
2. In the main menu, click  icon to open the Meetings screen.

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
Choose customer plant*	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
Meeting Title*	Enter the suitable title for the meeting
Meeting Type*	Select the type or purpose of the meeting such as support visit, tool delivery and so on
Contact	Select the type of interaction in the meeting (In Person or Virtual)
Room	Enter the meeting room details

Date*	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.
Start Time*	Select the start time for the meeting
End Time*	Select the end time for the meeting
Occurrence	Select the occurrence of the meeting, if its daily, weekly, monthly or yearly
Meeting Information	Enter the meeting information
Agenda*	Enter the Agenda, the user can add multiple points of agenda by clicking the  Add New . 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 60:New Assignee Popup

Select Assignee

Current Location All

My Users **EGC Users**

Search 

[John Doe](#)
 [Bob Rogers](#)
 [Alice Johnson](#) (Owner Manager User Created)
 [Gillian Taylor](#)

New **Attendee**

External Participant (Separated by ";")

Close **Done**



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..

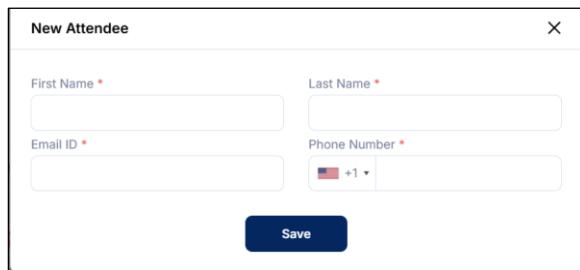
- **EGC Users:** Lists the EGC employees. Enable the users to add to the Invitee list.



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



The screenshot shows a modal window titled 'New Attendee'. It contains four input fields: 'First Name *' and 'Last Name *' in the top row, and 'Email ID *' and 'Phone Number *' in the bottom row. Each field has a red asterisk indicating it is required. Below the fields is a dropdown menu showing 'USA +1'. At the bottom of the window is a blue 'Save' button.



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

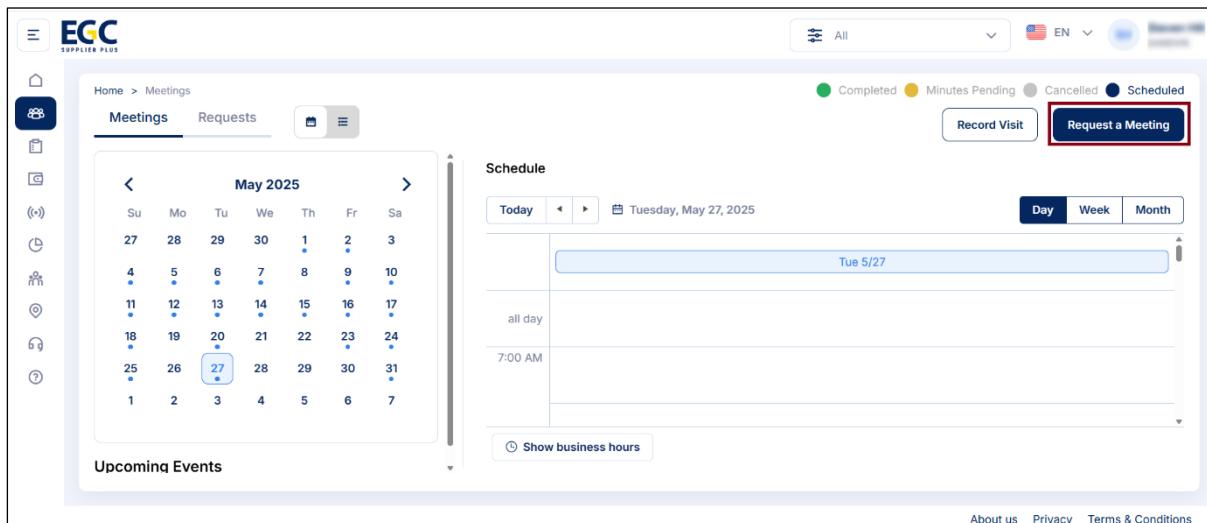
The Request a Meeting screen enables the supplier to request the EGC member for a meeting. A supplier requests a meeting with an employee to go over important product-related topics, making sure that every facet of the offering is fully considered and tailored to the needs of the EGC user. The supplier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

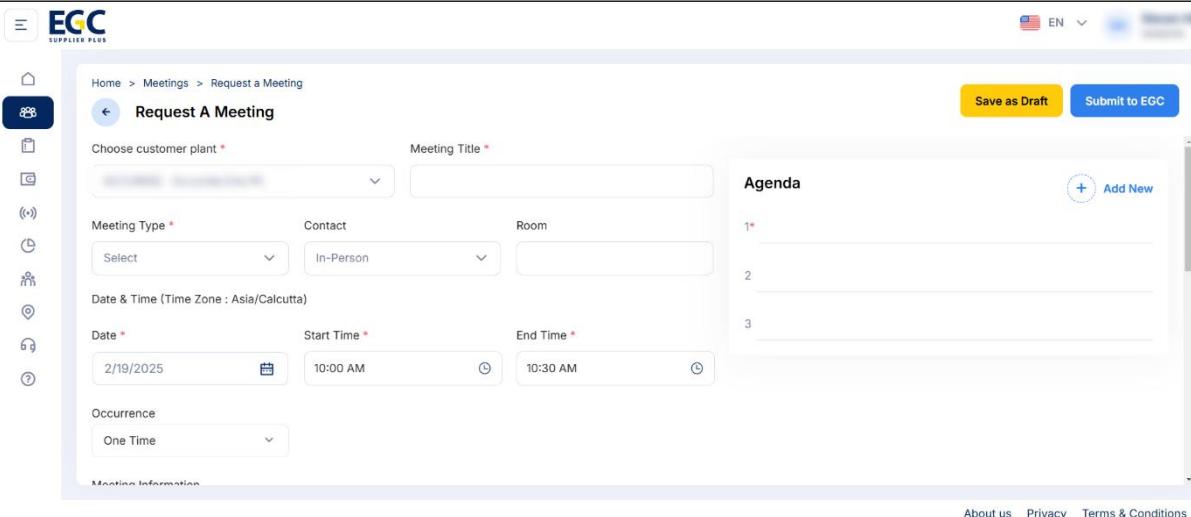
1. Sign in to the EGC Supplier Plus application. The Dashboard screen is displayed.
2. In the main menu, click  icon to open the Meetings screen.

Figure 62: Meetings



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

Figure 63: Request a meeting



The screenshot shows the 'Request A Meeting' page. At the top, there are buttons for 'Save as Draft' and 'Submit to EGC'. The main form area includes fields for 'Choose customer plant*', 'Meeting Title*', 'Meeting Type*', 'Contact', 'Room', 'Date & Time (Time Zone : Asia/Calcutta)', 'Date', 'Start Time', 'End Time', 'Occurrence', and 'Agenda'. The 'Agenda' section has three text input fields labeled 1*, 2, and 3, with a 'Add New' button. On the left, there is a sidebar with various icons. At the bottom, there are links for 'About us', 'Privacy', and 'Terms & Conditions'.

4. On the screen, enter the following details:

Table 8: Request a meeting

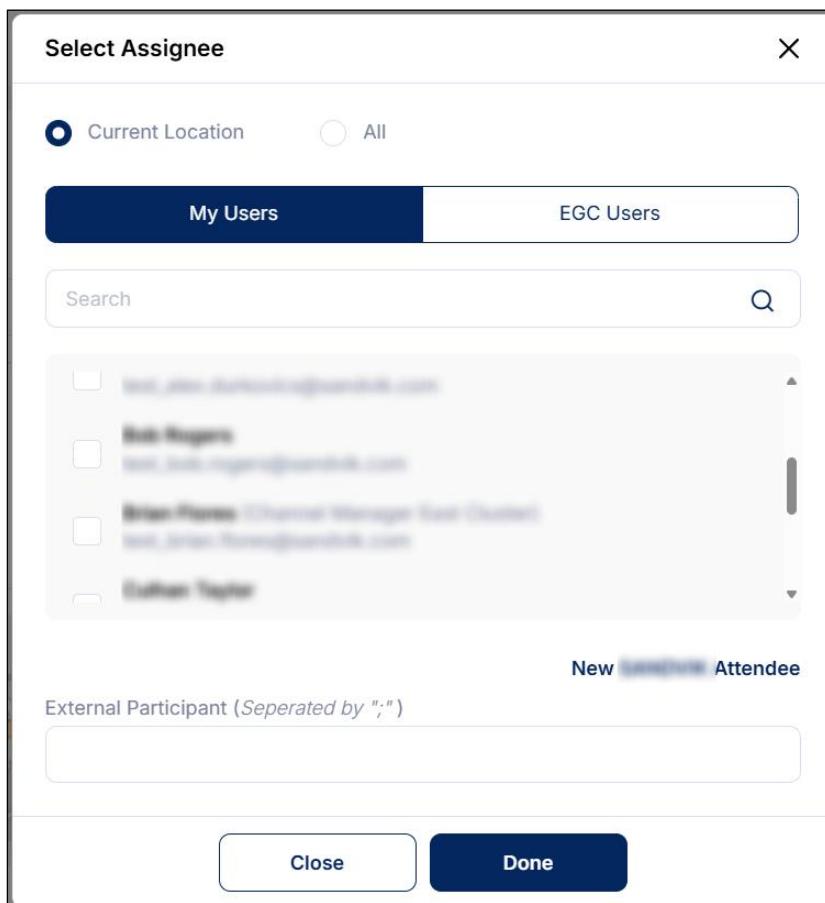
Field	Description
Choose customer plant*	Select the customer plant for the meeting. The plants are populated based on the user preferences set in the user profile. Refer My Profile
Meeting Title*	Enter the suitable title for the meeting
Meeting Type*	Select the type or purpose of the meeting such as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

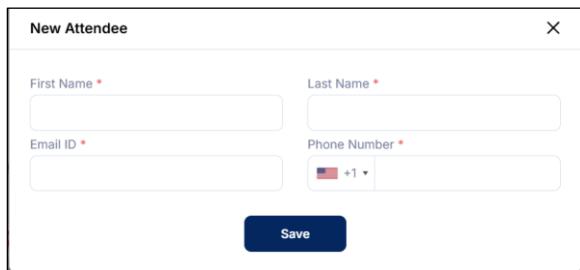
- **External Users:** Users who are not EGC employees or from the supplier's organisation can also be added to the invitee list.
- **New **** Attendee:** Click to add a new attendee from the supplier organization. A popup is displayed.



***** 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




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.

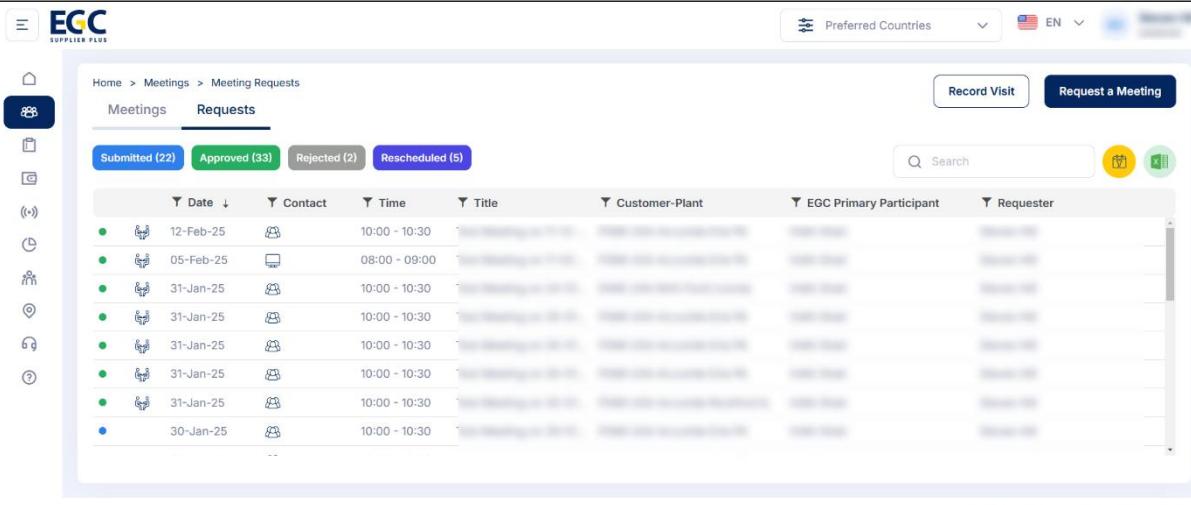
- Reject the meeting stating the reason for rejection.

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 screenshot shows the 'Meeting Requests' section of the EGC Supplier Plus interface. At the top, there are buttons for 'Record Visit' and 'Request a Meeting'. Below that is a search bar and filter icons. The main area is a grid of meeting details with columns: Date, Contact, Time, Title, Customer-Plant, EGC Primary Participant, and Requester. Above the grid, there are buttons for filtering by status: Submitted (22), Approved (33), Rejected (2), and Rescheduled (5). The grid lists several meetings with details like date (e.g., 12-Feb-25, 05-Feb-25, 31-Jan-25), time (e.g., 10:00 - 10:30, 08:00 - 09:00), and requester (e.g., EGC Primary Participant).

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 screenshot shows the 'Meeting Requests' section of the EGC Supplier Plus interface. At the top, there are buttons for 'Meetings' and 'Requests'. Below that is a row of buttons for filtering by status: Draft, Submitted, Approved, Requested for Clarification, Rejected, Discarded, and Rescheduled. The 'Approved' button is highlighted in green, indicating it is selected. The other buttons are in a standard orange color.

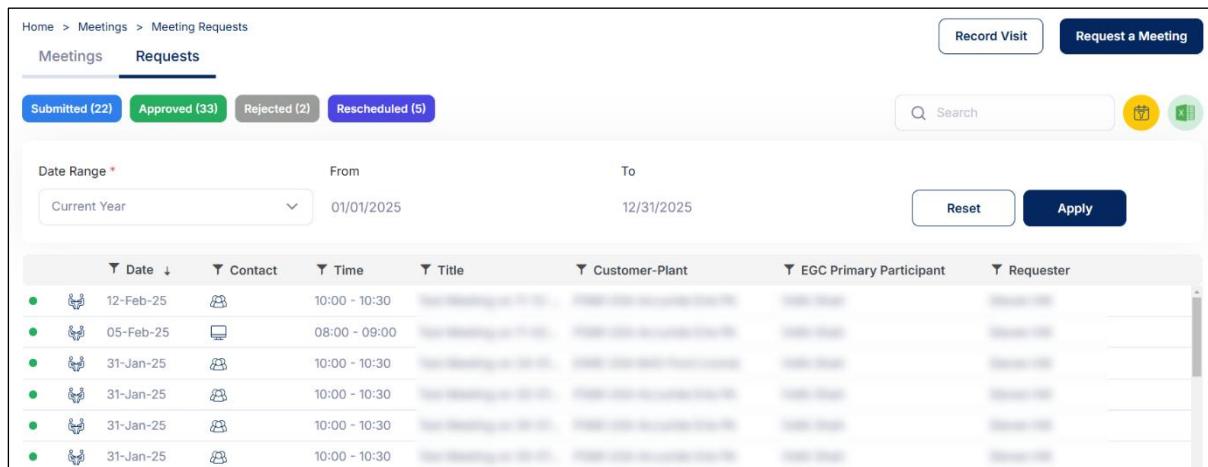
The various statuses for the meeting are as follows:

- **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	Contact	Time	Title	Customer-Plant	EGC Primary Participant	Requester
●	12-Feb-25	✉	10:00 - 10:30				
●	05-Feb-25	✉	08:00 - 09:00				
●	31-Jan-25	✉	10:00 - 10:30				
●	31-Jan-25	✉	10:00 - 10:30				
●	31-Jan-25	✉	10:00 - 10:30				
●	31-Jan-25	✉	10:00 - 10:30				



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.

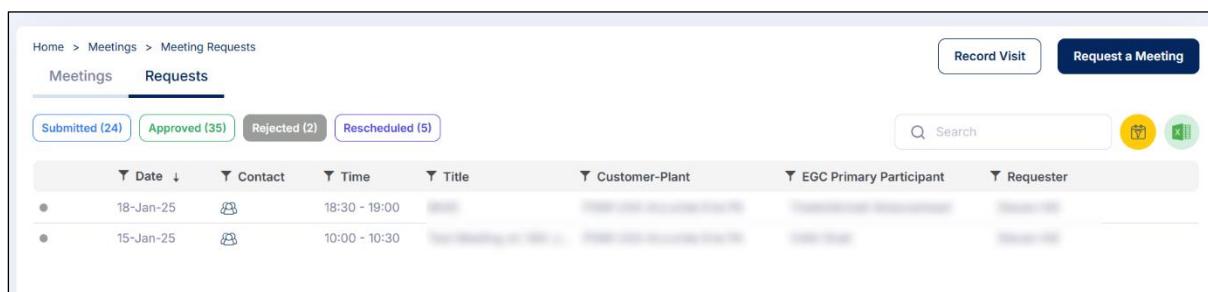
5.5.1 Resubmit a rejected request

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:

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

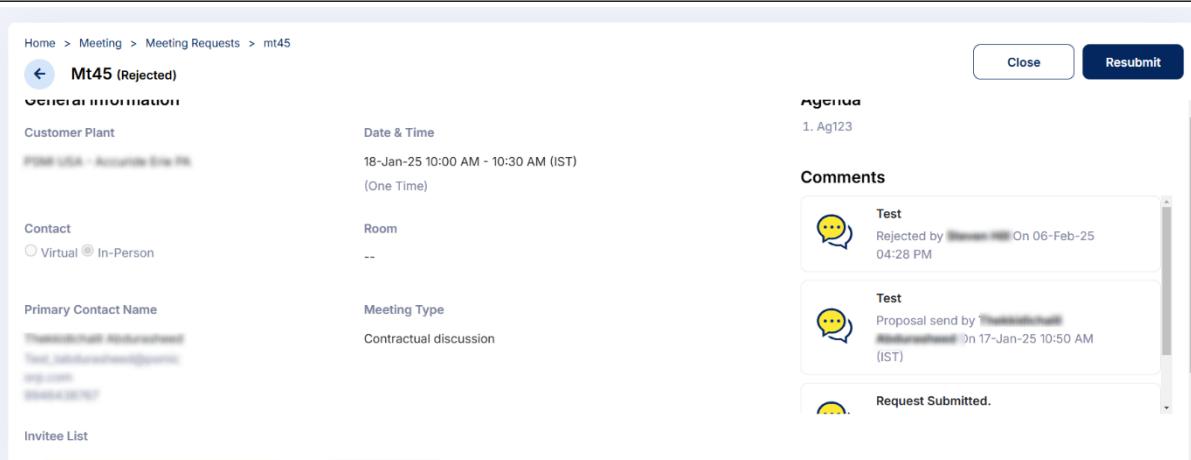
Figure 69: Rejected list of requests



	Date	Contact	Time	Title	Customer-Plant	EGC Primary Participant	Requester
●	18-Jan-25	✉	18:30 - 19:00				
●	15-Jan-25	✉	10:00 - 10:30				

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

Figure 70: Request details



Home > Meeting > Meeting Requests > mt45

Mt45 (Rejected)

General Information

Customer Plant: PTMPL USA - Accountable Site 001

Date & Time: 18-Jan-25 10:00 AM - 10:30 AM (IST)
(One Time)

Contact: Virtual In-Person

Primary Contact Name: Test, test@supplierplus.com
test@supplierplus.com

Meeting Type: Contractual discussion

Room: --

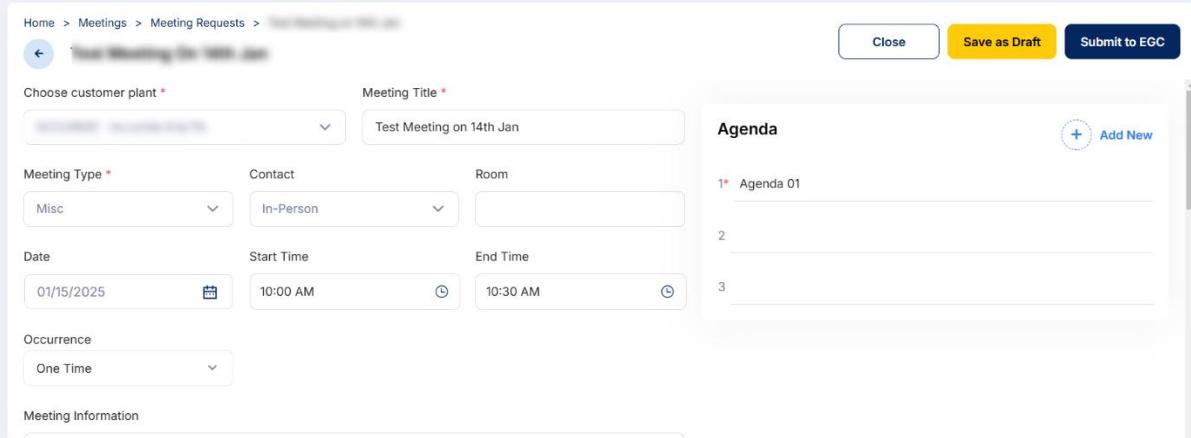
Invittee List

Comments:

- Test
Rejected by [REDACTED] On 06-Feb-25 04:28 PM
- Test
Proposal send by [REDACTED] [REDACTED] On 17-Jan-25 10:50 AM (IST)
- Request Submitted.

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

Figure 71: Submit a Request



Home > Meetings > Meeting Requests > New Meeting on 14th Jan

New Meeting on 14th Jan

Choose customer plant *: [REDACTED]

Meeting Title *: Test Meeting on 14th Jan

Meeting Type *: Misc

Contact: In-Person

Room: --

Date: 01/15/2025

Start Time: 10:00 AM

End Time: 10:30 AM

Occurrence: One Time

Agenda

1* Agenda 01

2

3

Save as Draft **Submit to EGC**

- Enter/Edit the details of the request.
- Click **Submit to EGC** to resubmit the request for approval. Click **Save as Draft** to save the request and submit it later.
- 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.

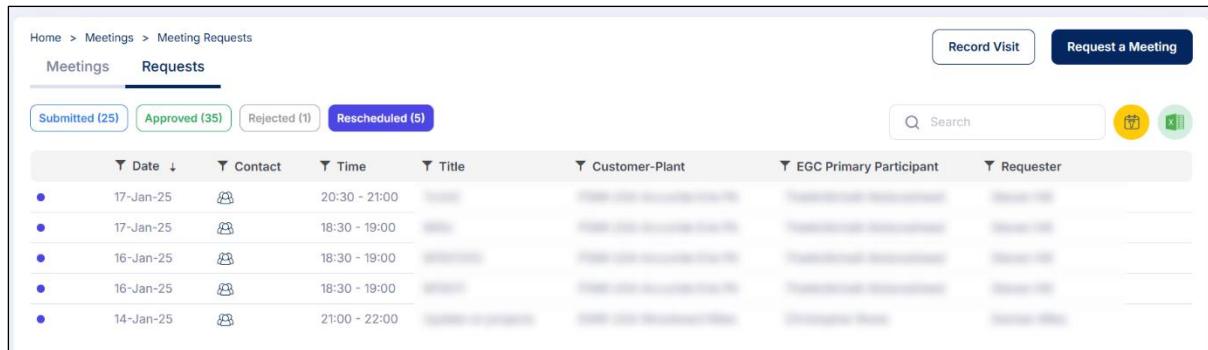
5.5.2 Rescheduled meeting request

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.

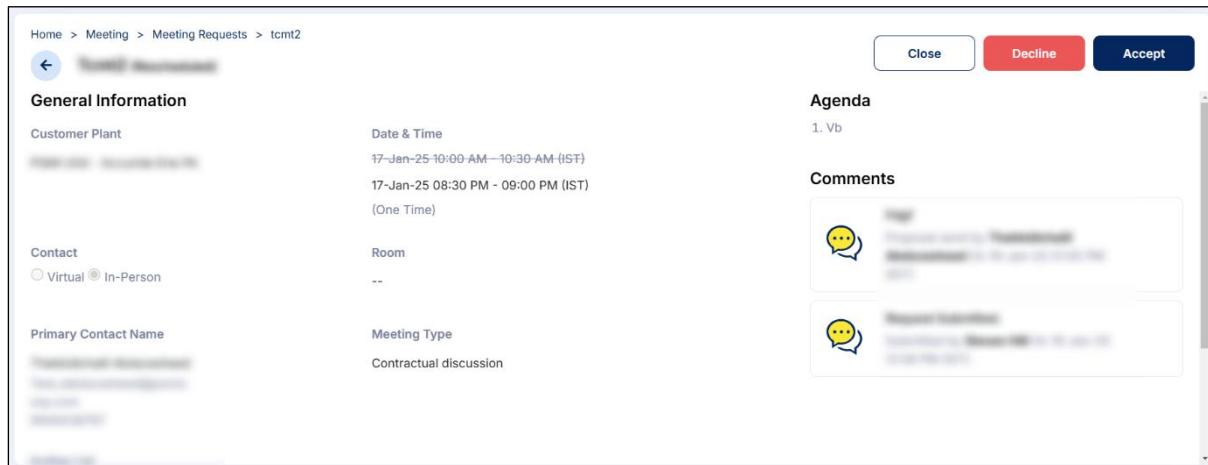
Figure 72: Rescheduled requests



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



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

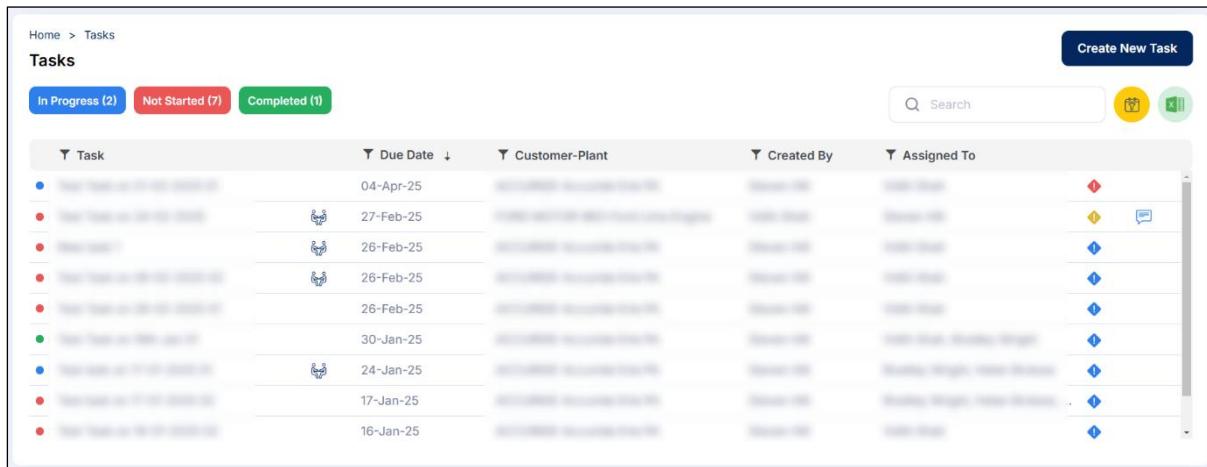


*The user can click **Decline** to decline the new proposed time. The status is updated to the EGC user.*

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



The screenshot shows a table with the following data:

Task	Due Date	Customer-Plant	Created By	Assigned To
●	04-Apr-25	Customer-Plant 1	John Doe	High Priority
●	27-Feb-25	Customer-Plant 2	Jane Smith	Medium Priority
●	26-Feb-25	Customer-Plant 3	John Doe	Medium Priority
●	26-Feb-25	Customer-Plant 4	Jane Smith	Medium Priority
●	26-Feb-25	Customer-Plant 5	John Doe	Medium Priority
●	30-Jan-25	Customer-Plant 6	Jane Smith	Medium Priority
●	24-Jan-25	Customer-Plant 7	John Doe	Medium Priority
●	17-Jan-25	Customer-Plant 8	Jane Smith	Medium Priority
●	16-Jan-25	Customer-Plant 9	John Doe	Medium Priority

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

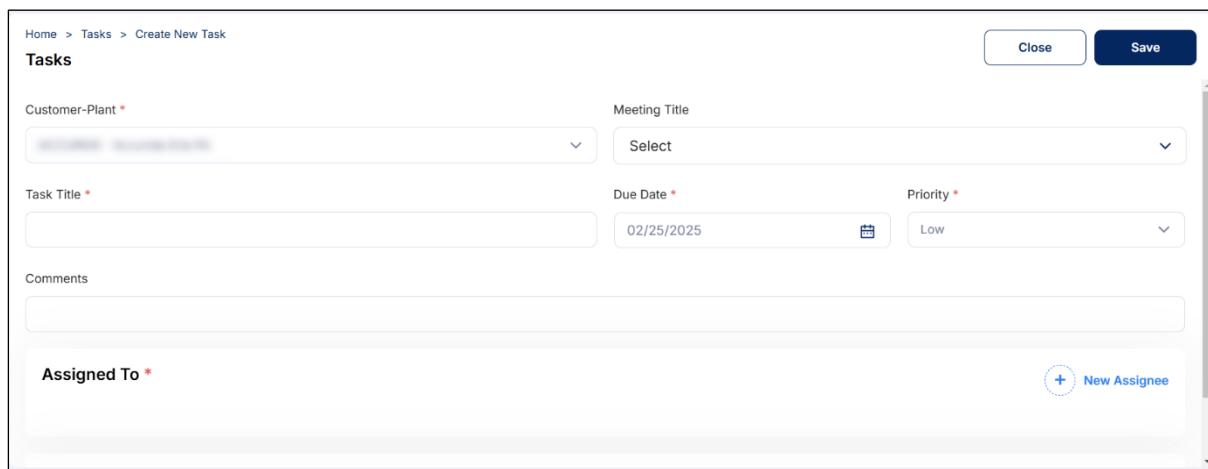
6.1 Create New Task

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



Home > Tasks > Create New Task

Tasks

Customer-Plant *:

Meeting Title:

Task Title *:

Due Date *: 02/25/2025

Priority *: Low

Comments:

Assigned To *: + New Assignee

Close **Save**

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.

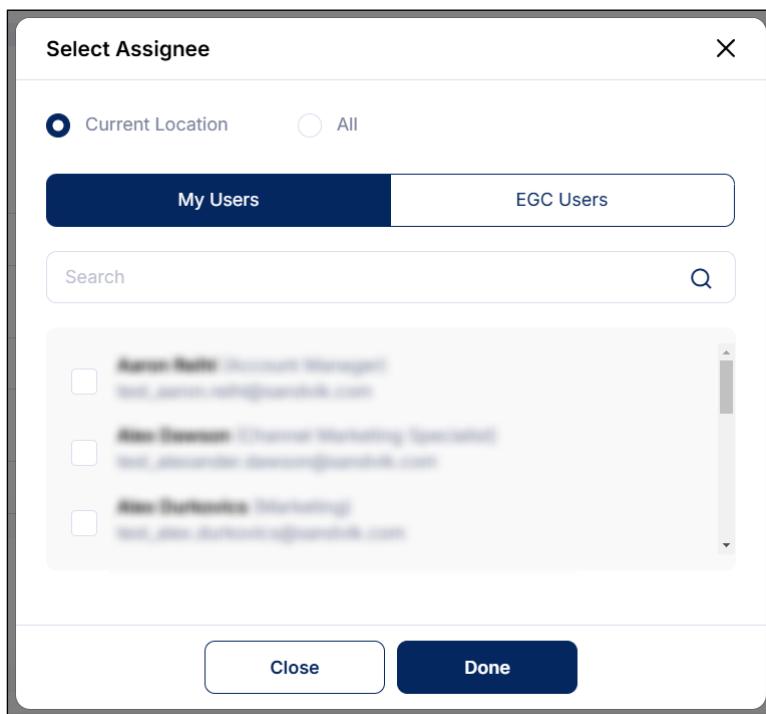
- **Meeting Title**: Select the meeting from the list if the task is related to a specific meeting.



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

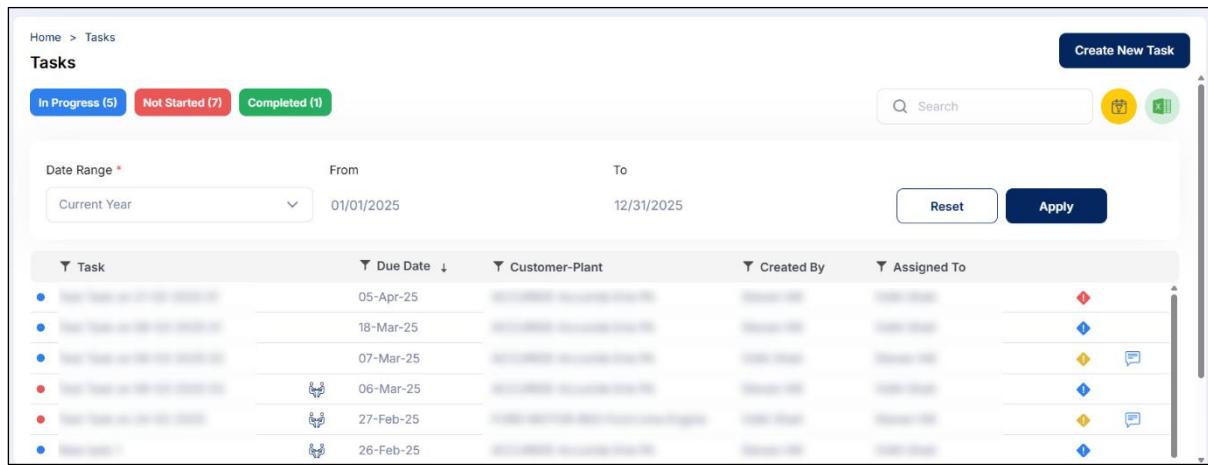
The tasks screen displays the list of tasks. Three priorities are used to categorise the tasks:

-  - 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



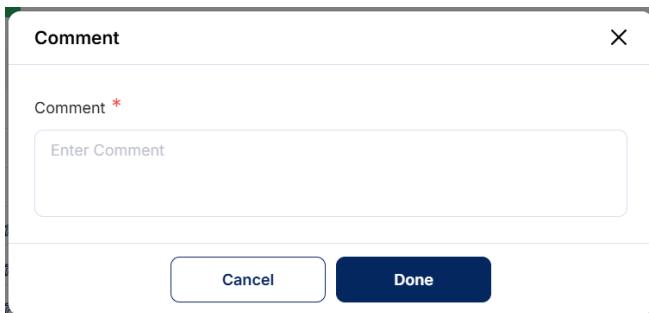
Task	Due Date	Customer-Plant	Created By	Assigned To
●	05-Apr-25	Customer-Plant 1	Created By 1	Assigned To 1
●	18-Mar-25	Customer-Plant 2	Created By 2	Assigned To 2
●	07-Mar-25	Customer-Plant 3	Created By 3	Assigned To 3
●	06-Mar-25	Customer-Plant 4	Created By 4	Assigned To 4
●	27-Feb-25	Customer-Plant 5	Created By 5	Assigned To 5
●	26-Feb-25	Customer-Plant 6	Created By 6	Assigned To 6



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 79: In-Progress tasks

Home > Tasks		Tasks				Create New Task	
		In Progress (2)		Not Started (7)		Completed (1)	
		Task	Due Date	Customer-Plant	Created By	Assigned To	
●	Test Task on 21-02-2025 01	04-Apr-25	Customer-Plant	Steven Hill	Customer-Plant	Customer-Plant	Red
●	Test task on 17-01-2025 01	24-Jan-25	Customer-Plant	Steven Hill	Customer-Plant	Customer-Plant	Blue

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

Figure 80: IN-progress task details

Home > Tasks > Test Task on 21-02-2025 ...

Test Task On 21-02-2025 01

Task Info **Attachments (0)**

Task	Customer-Plant	Created By	Priority
Test Task on 21-02-2025 01	Customer-Plant	Steven Hill	High
Due Date	Status		
02/28/2025	In Progress		
Assigned To (1)		+ New Assignee	
 John Doe 10%			
Comments (1)		+ 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. The old date is struck out and new date is displayed.
- 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**.

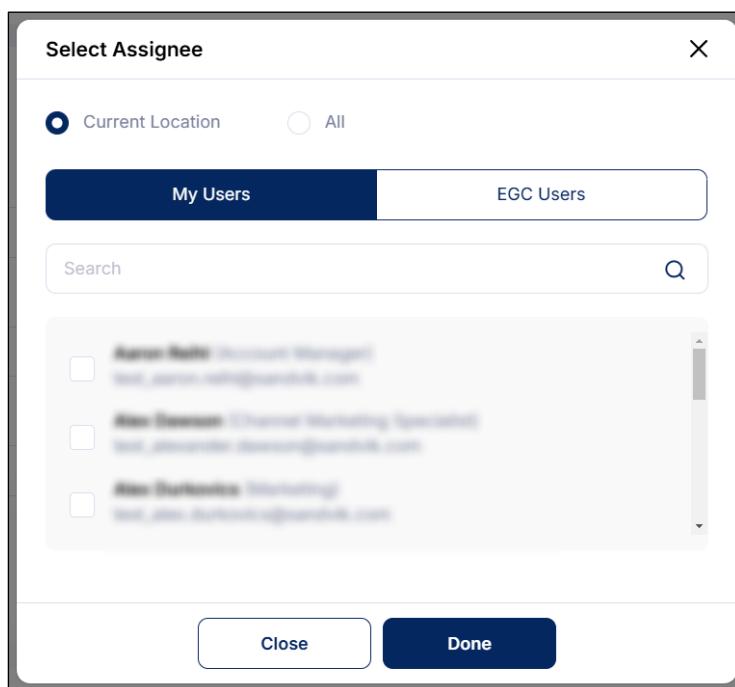


Updating Due Date and In Progress percentage can be done by the admin, assigned user or the user who created the task.

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 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

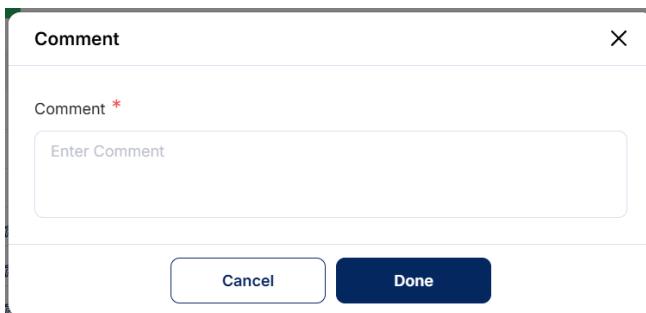
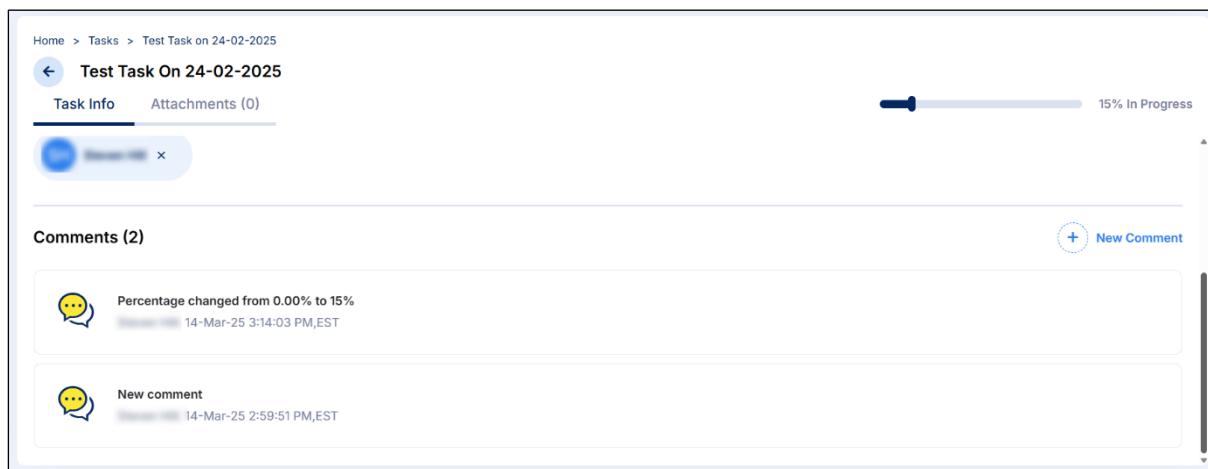


Figure 83: Comments



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



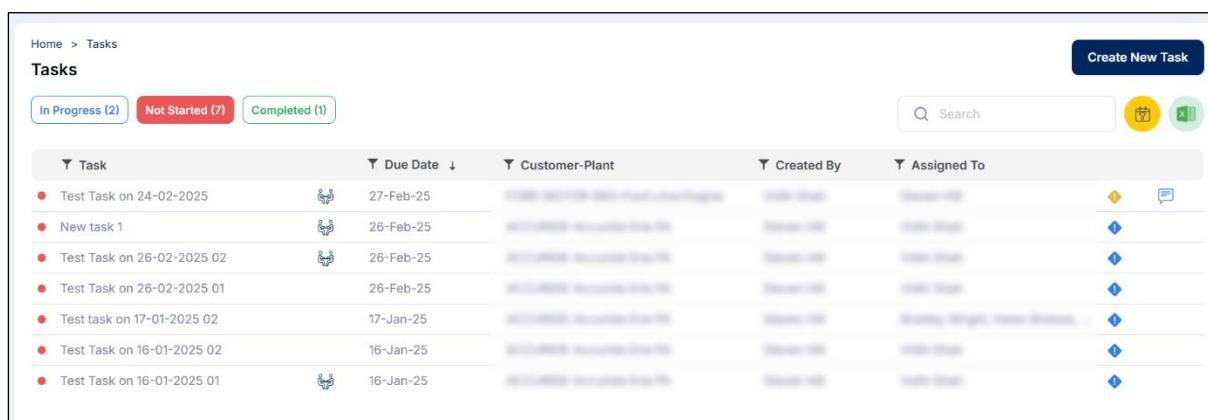
The upload option does not support uploading exe (executable) files.

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.

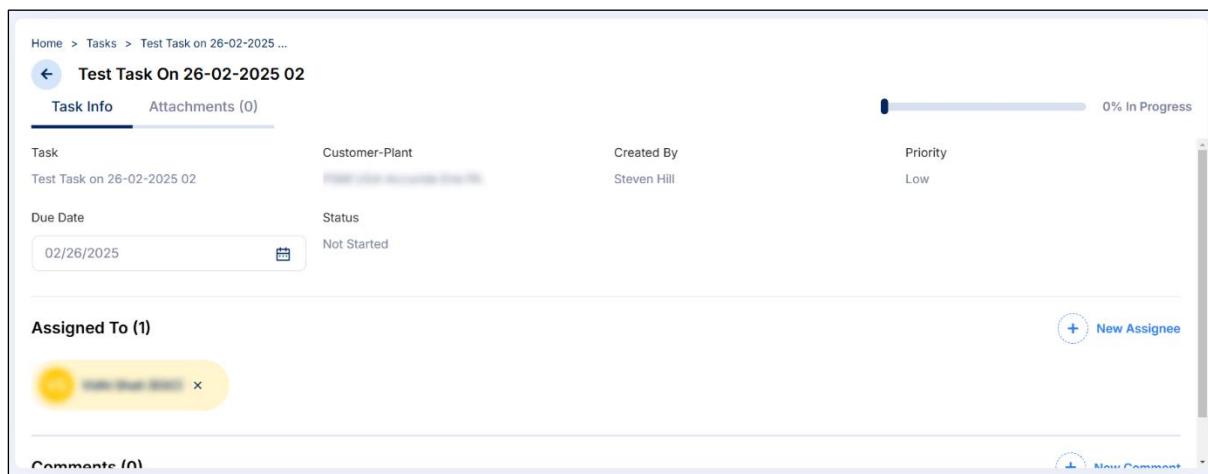
Figure 84: Not Started tasks



Task	Due Date	Customer-Plant	Created By	Assigned To
Test Task on 24-02-2025	27-Feb-25	Customer 1	Created By 1	Action icons
New task 1	26-Feb-25	Customer 2	Created By 2	Action icons
Test Task on 26-02-2025 02	26-Feb-25	Customer 3	Created By 3	Action icons
Test Task on 26-02-2025 01	26-Feb-25	Customer 4	Created By 4	Action icons
Test task on 17-01-2025 02	17-Jan-25	Customer 5	Created By 5	Action icons
Test Task on 16-01-2025 02	16-Jan-25	Customer 6	Created By 6	Action icons
Test Task on 16-01-2025 01	16-Jan-25	Customer 7	Created By 7	Action icons

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)

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

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

Assigned To (1): **Customer-Plant** + 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**.

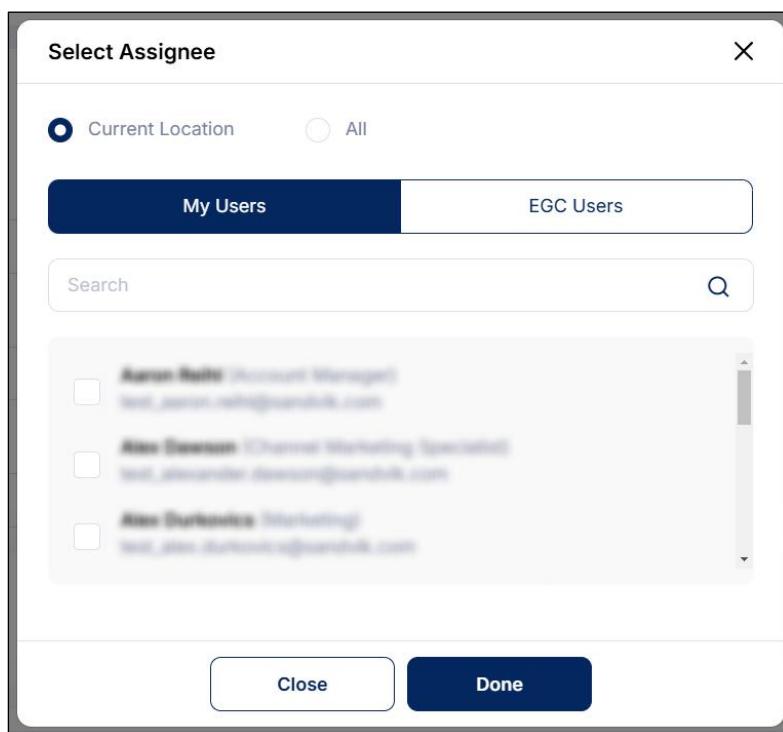


Updating Due Date and In Progress percentage can be done by the admin, assigned user or the user who created the task.

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



- 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

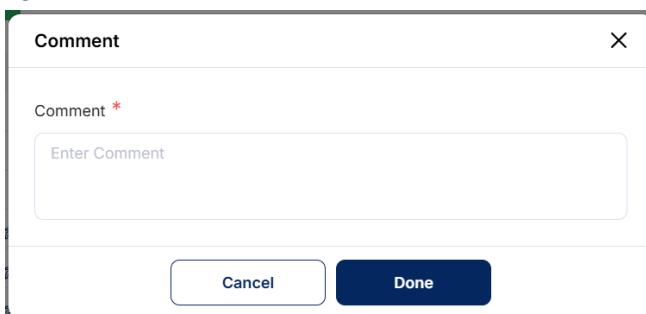


Figure 88: Comments



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



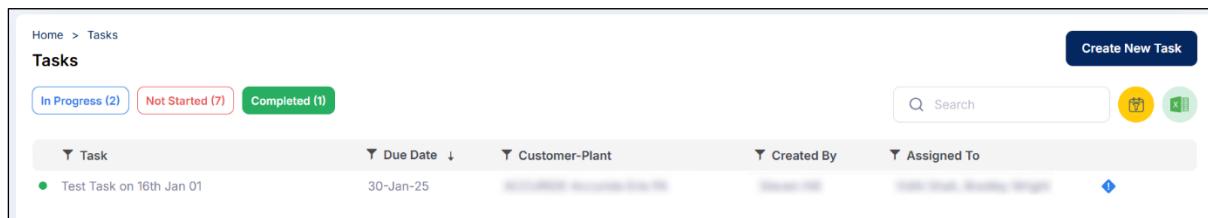
The upload option does not support uploading exe files.

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

6.2.3 Completed tasks

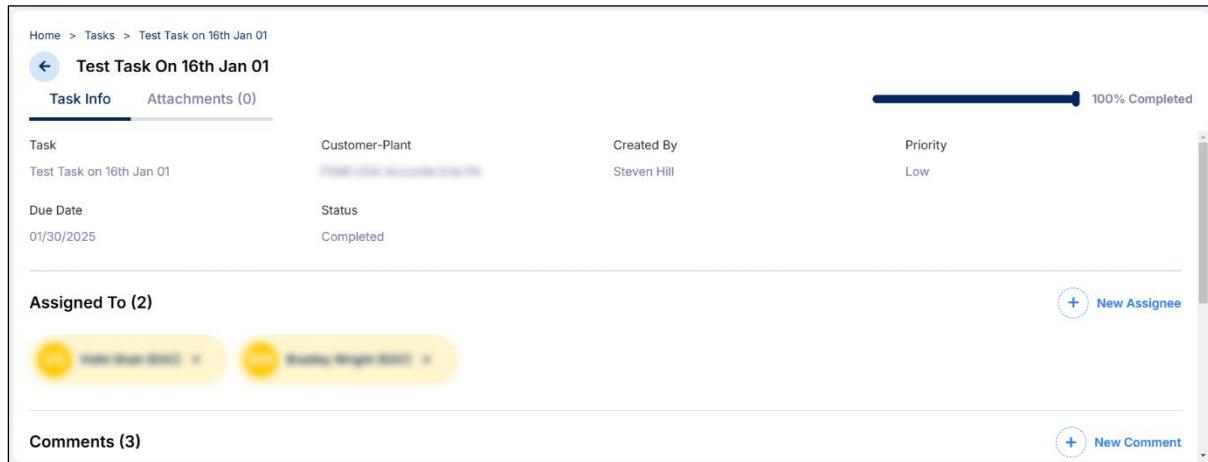
Tasks that are completed are termed as completed tasks. Enable the Completed button above the grid to filter the completed tasks.

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**.

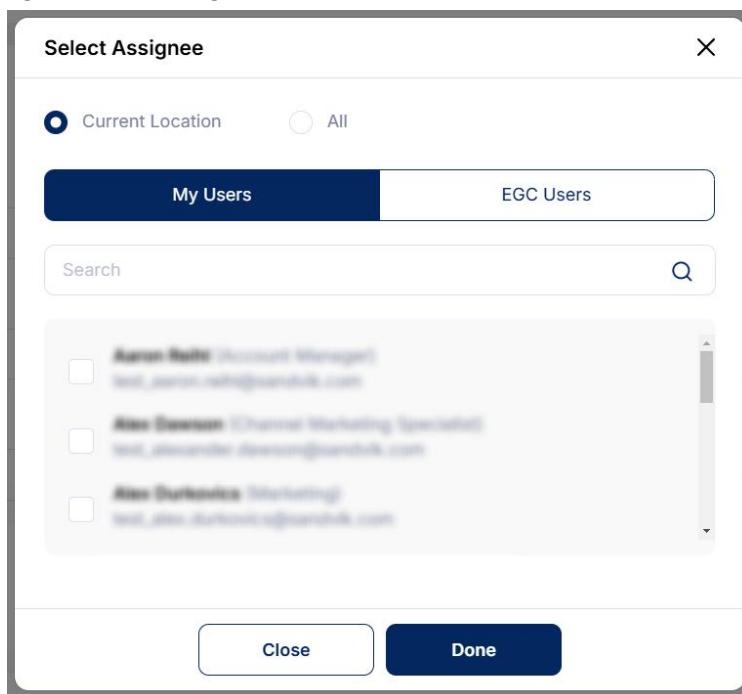


Updating Due Date and In Progress percentage can be done by the admin, assigned user or the user who created the task.

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

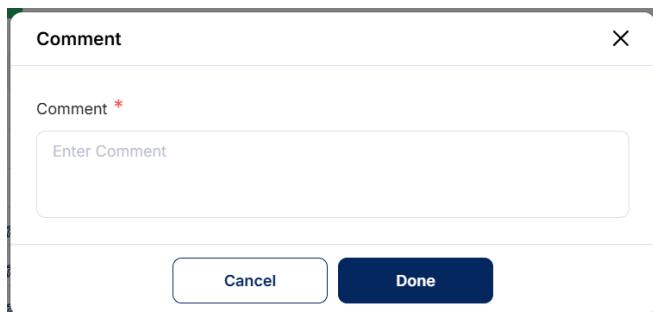
- Assign task by clicking **New Assignee**, the **Select Assignee** popup is displayed. In the **Select Assignee** popup, do the following:

Figure 91: Select Assignee



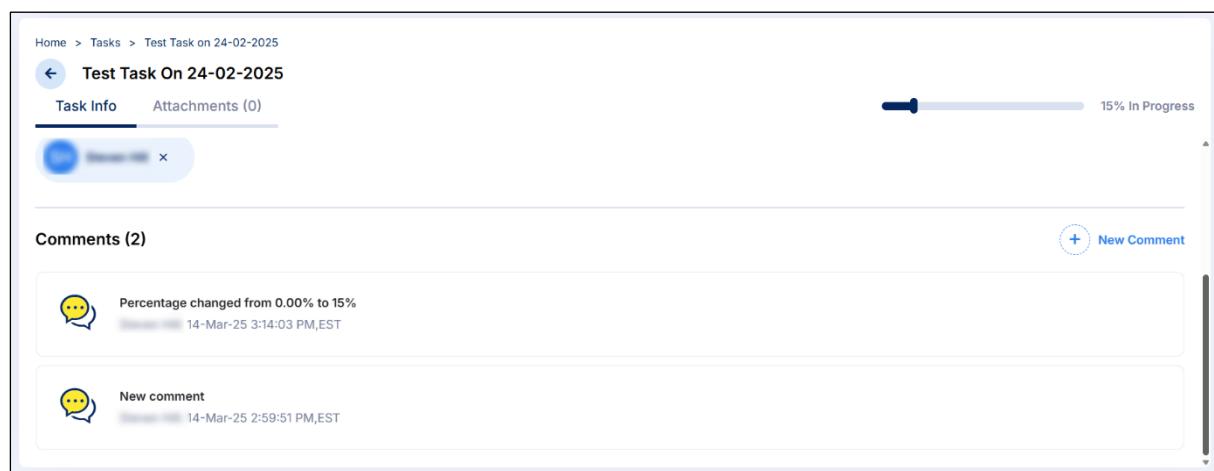
- By default, **Current Location** is enabled, user can select **All** to display all the users.
- **My Users:** Lists the users **from** the supplier's organisation. Enable the users to assign the task.
- **EGC Users:** Lists the EGC employees. Enable the users to assign the task.
- Click **New Comment**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



A screenshot of a 'Comment' dialog box. The title bar says 'Comment' and has a close button 'X'. Below the title is a label 'Comment *' with a red asterisk. A text input field contains the placeholder 'Enter Comment'. At the bottom are two buttons: 'Cancel' in a light blue box and 'Done' in a dark blue box.

Figure 93: Comments



A screenshot of a task details page. The top navigation shows 'Home > Tasks > Test Task on 24-02-2025'. The main title is 'Test Task On 24-02-2025'. Below it, 'Task Info' is selected and 'Attachments (0)' is shown. A progress bar indicates '15% In Progress'. The 'Comments (2)' section lists two entries: 'Percentage changed from 0.00% to 15%' (timestamp: 14-Mar-25 3:14:03 PM,EST) and 'New comment' (timestamp: 14-Mar-25 2:59:51 PM,EST). A 'New Comment' button is located on the right.

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



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

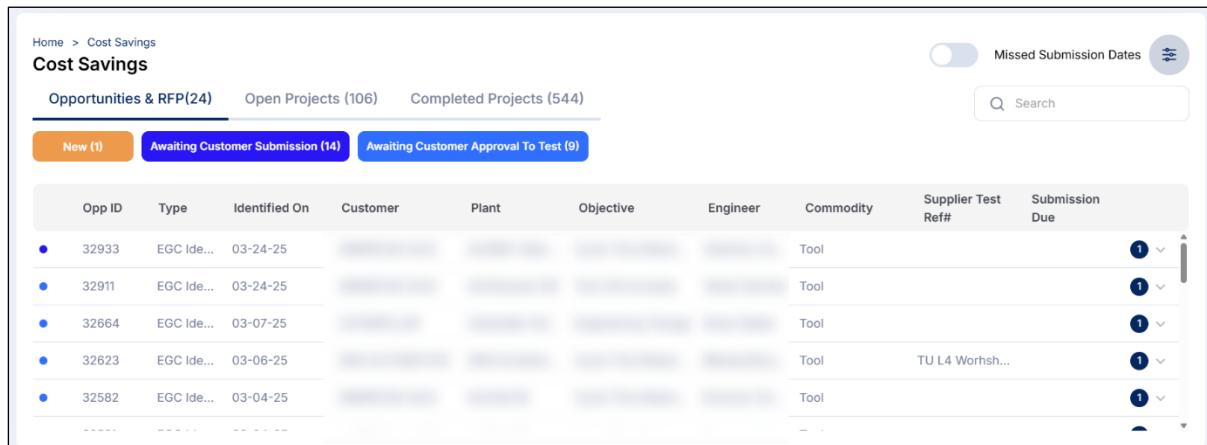
The task details are updated. The assignee will be notified via an Email.

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

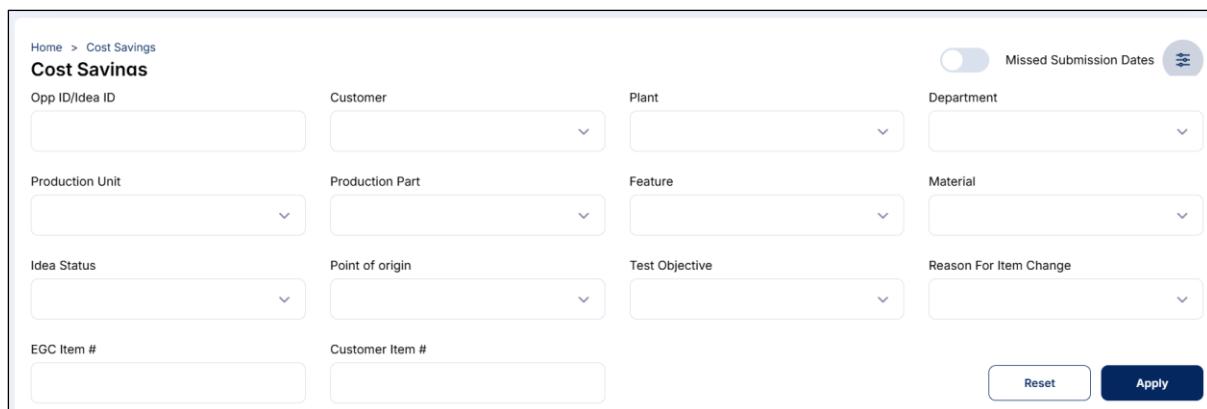


The screenshot shows the 'Cost Savings' module interface. At the top, there are navigation links: 'Home > Cost Savings', 'Missed Submission Dates' (a toggle switch), and a 'Search' bar. Below these are three tabs: 'Opportunities & RFP(24)', 'Open Projects (106)', and 'Completed Projects (544)'. The 'Opportunities & RFP(24)' tab is selected. Underneath are three sub-tabs: 'New (1)', 'Awaiting Customer Submission (14)', and 'Awaiting Customer Approval To Test (9)'. The main area is a table with the following columns: Opp ID, Type, Identified On, Customer, Plant, Objective, Engineer, Commodity, Supplier Test Ref#, and Submission Due. The table contains five rows of data, each with a blue circular icon and a downward arrow.

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



The screenshot shows the 'Advanced Search' interface for the 'Cost Savings' module. It features a grid of search fields with dropdown menus for various filters: '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 #', and 'Customer Item #'. At the bottom right are 'Reset' and 'Apply' buttons, and a 'Search' bar.

- 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.

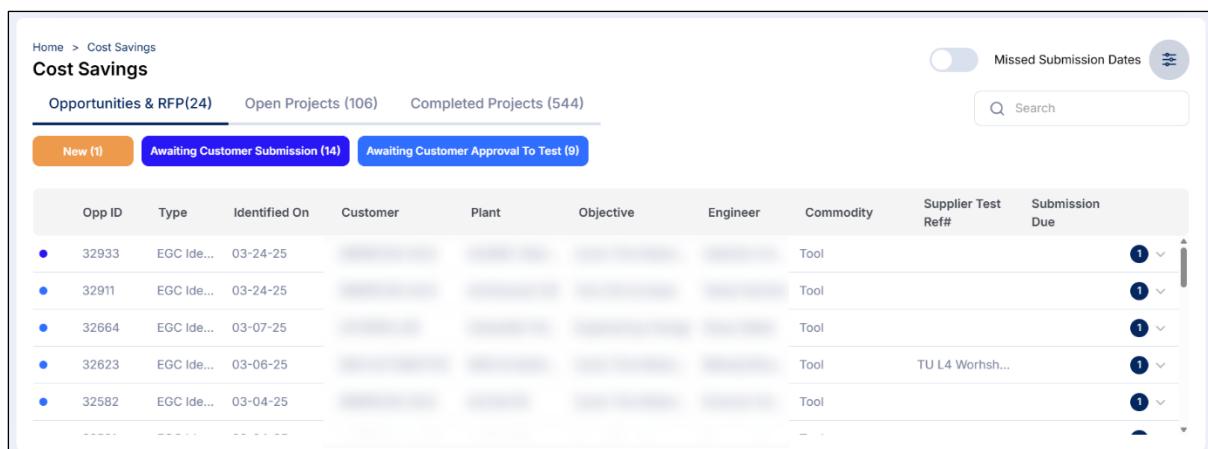
7.1 Opportunities and RFPs

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



The screenshot shows the 'Cost Savings' section of the EGC Supplier Plus interface. At the top, there are links for 'Home', 'Cost Savings', 'Opportunities & RFP (24)', 'Open Projects (106)', and 'Completed Projects (544)'. A search bar and a 'Missed Submission Dates' toggle are also present. Below these, three buttons indicate the count of opportunities: 'New (1)', 'Awaiting Customer Submission (14)', and 'Awaiting Customer Approval To Test (9)'. The main area is a table with columns: Opp ID, Type, Identified On, Customer, Plant, Objective, Engineer, Commodity, Supplier Test Ref#, and Submission Due. The table lists five opportunities, all of which are marked as 'Tool' and have a status of '1'. The 'Customer' and 'Plant' columns are heavily redacted.

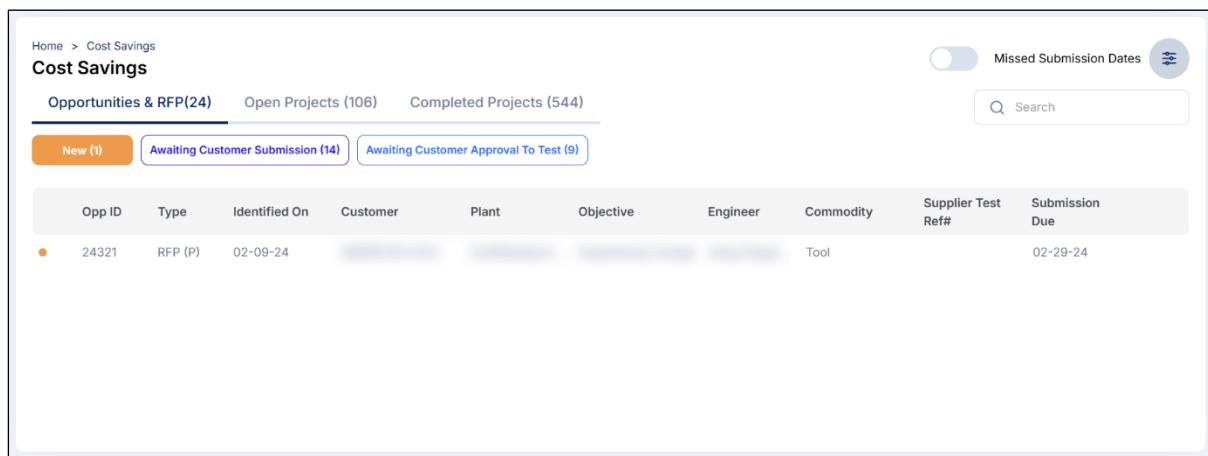
Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#	Submission Due
32933	EGC Ide...	03-24-25				Tool			1
32911	EGC Ide...	03-24-25				Tool			1
32664	EGC Ide...	03-07-25				Tool			1
32623	EGC Ide...	03-06-25				Tool	TU L4 Worhsh...		1
32582	EGC Ide...	03-04-25				Tool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

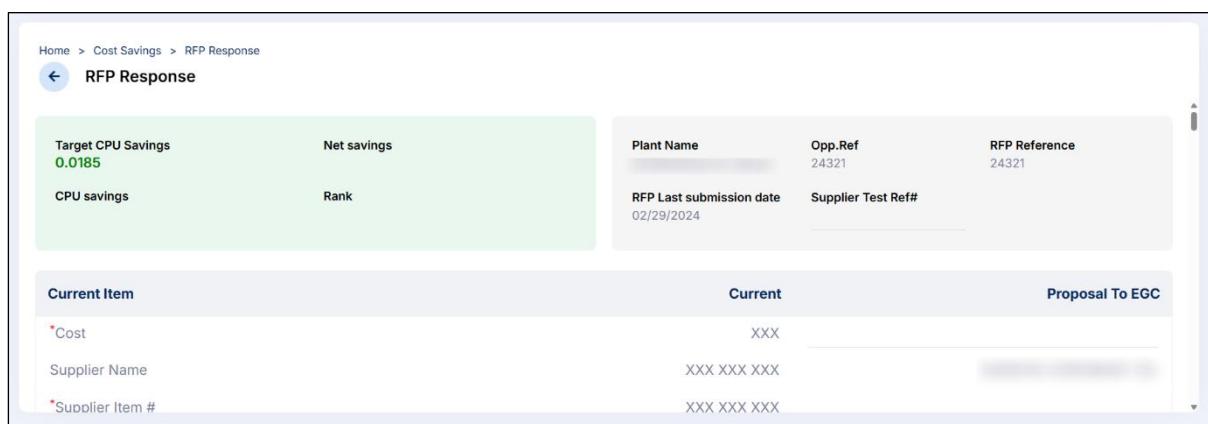
New (1) Awaiting Customer Submission (14) Awaiting Customer Approval To Test (9)

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

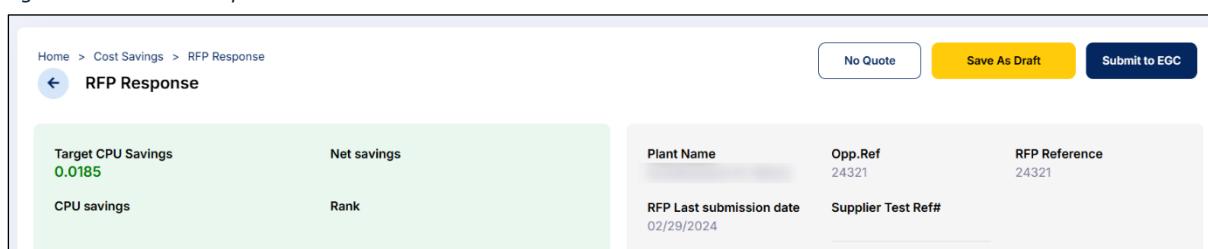
RFP Response

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

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

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

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

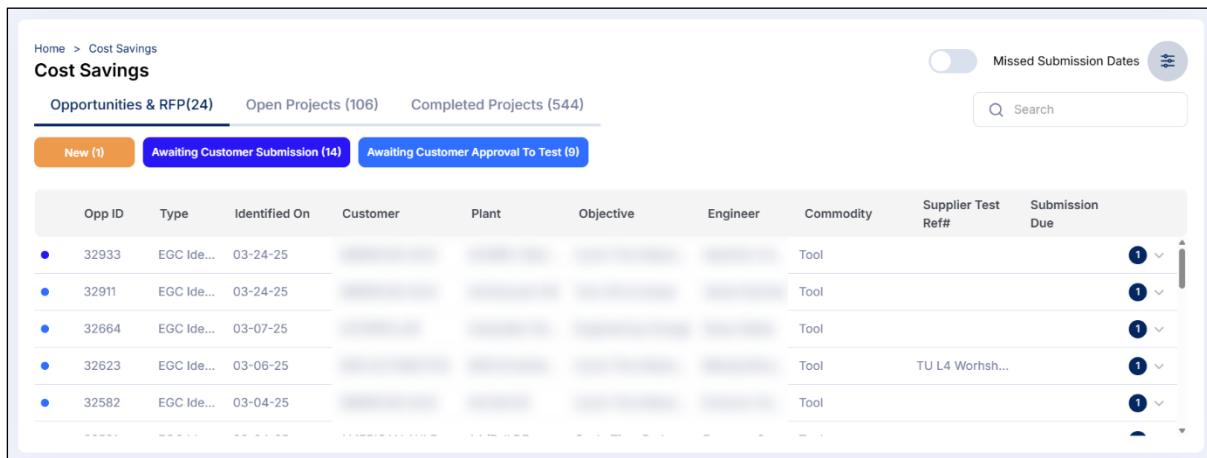
The supplier for whom the plant is enabled can perform any one of the following on the RFP:

- **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.

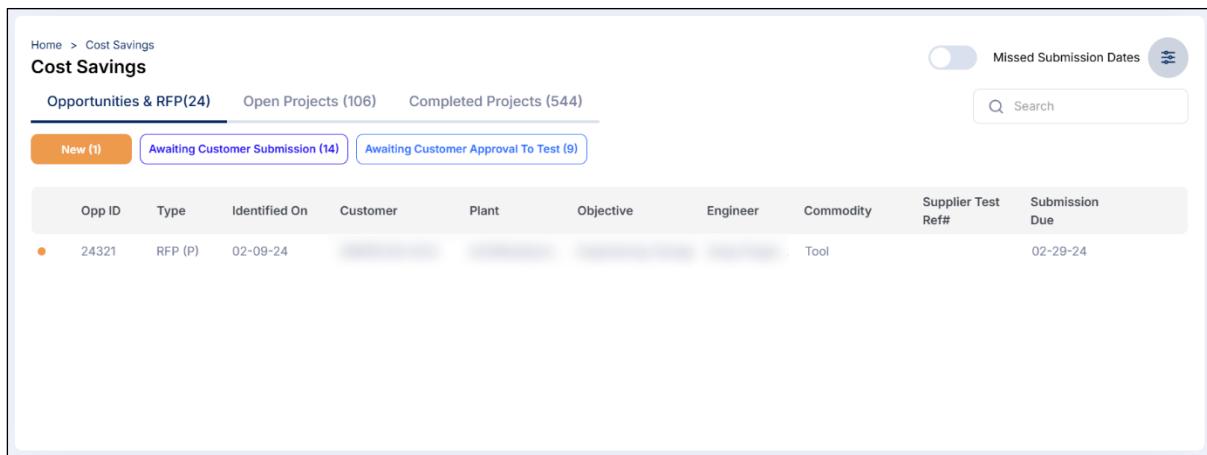
Figure 100: Cost Savings



The screenshot shows the 'Cost Savings' section of the EGC Supplier Plus interface. At the top, there are three tabs: 'Opportunities & RFP(24)', 'Open Projects (106)', and 'Completed Projects (544)'. Below these tabs, there are three buttons: 'New (1)', 'Awaiting Customer Submission (14)', and 'Awaiting Customer Approval To Test (9)'. A search bar is located at the top right. The main area is a grid table with the following columns: Opp ID, Type, Identified On, Customer, Plant, Objective, Engineer, Commodity, Supplier Test Ref#, and Submission Due. The grid contains five rows of data, each with a small blue circular icon and a number (1-5) in a dropdown menu.

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

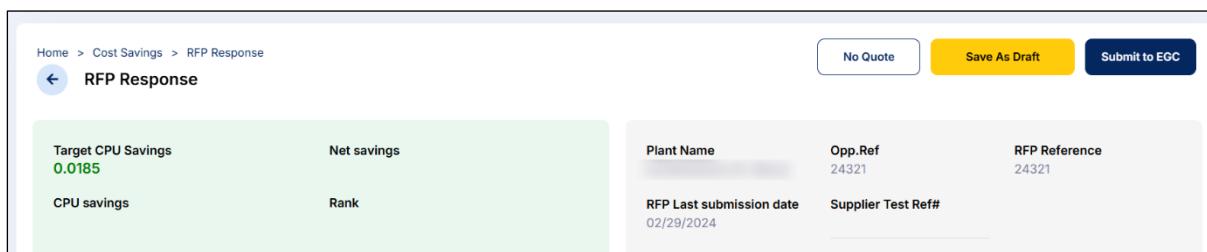
Figure 101: Opportunities and RFPs – New



The screenshot shows the 'Opportunities and RFPs – New' section of the EGC Supplier Plus interface. At the top, there are three tabs: 'Opportunities & RFP(24)', 'Open Projects (106)', and 'Completed Projects (544)'. Below these tabs, there are three buttons: 'New (1)', 'Awaiting Customer Submission (14)', and 'Awaiting Customer Approval To Test (9)'. A search bar is located at the top right. The main area is a grid table with the following columns: Opp ID, Type, Identified On, Customer, Plant, Objective, Engineer, Commodity, Supplier Test Ref#, and Submission Due. The grid contains one row of data, marked with an orange circle and the number 1.

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

Figure 102: New RFP Response



The screenshot shows the 'RFP Response' section of the EGC Supplier Plus interface. At the top, there are three tabs: 'Home > Cost Savings > RFP Response', 'RFP Response', and a back arrow. To the right are three buttons: 'No Quote', 'Save As Draft' (highlighted in yellow), and 'Submit to EGC'. The main area is divided into two sections. The left section contains 'Target CPU Savings' (0.0185) and 'CPU savings'. The right section contains 'Net savings', 'Plant Name', 'Opp.Ref', 'RFP Reference', 'RFP Last submission date' (02/29/2024), and 'Supplier Test Ref#'. The 'Net savings' section is highlighted in green.

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.

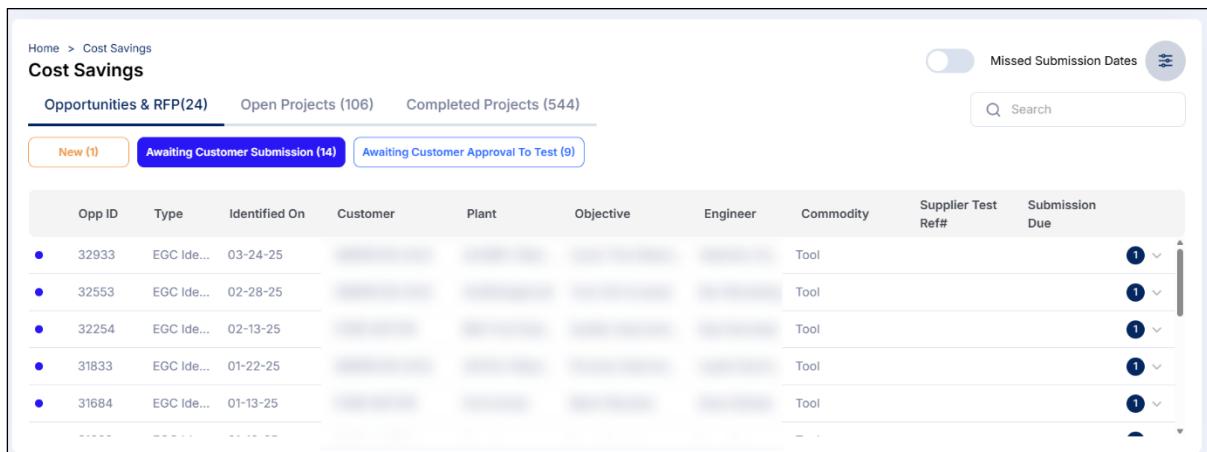
5. Click **Submit to EGC** to submit the proposal.

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.

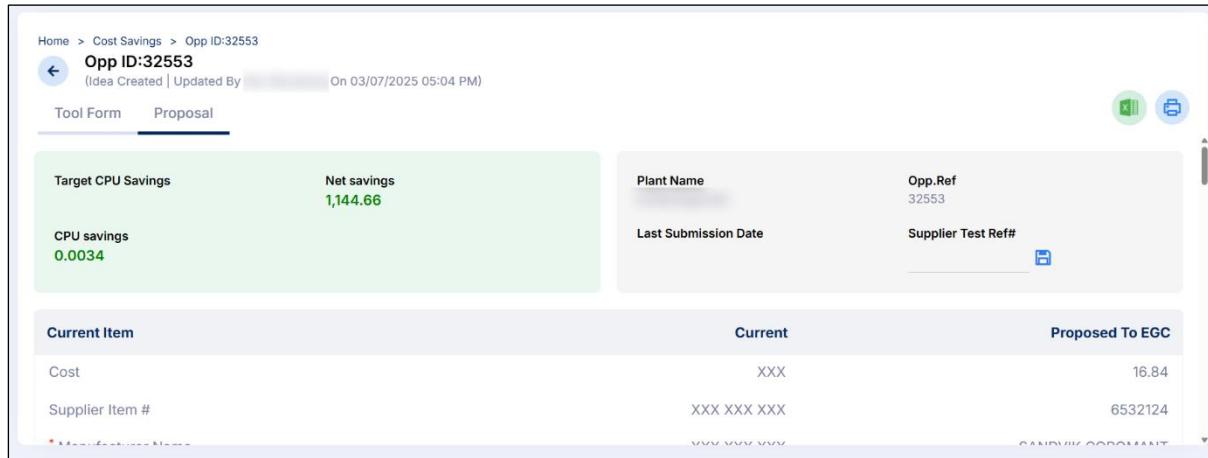
Figure 103: Opportunities and RFPs – Awaiting Customer Submission



Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#	Submission Due
32933	EGC Ide...	03-24-25				Tool		1	
32553	EGC Ide...	02-28-25				Tool		1	
32254	EGC Ide...	02-13-25				Tool		1	
31833	EGC Ide...	01-22-25				Tool		1	
31684	EGC Ide...	01-13-25				Tool		1	

Click on any specific project to view the details.

Figure 104: Awaiting Customer Submission Details



Home > Cost Savings > Opp ID:32553
Opp ID:32553
(Idea Created | Updated By _____ On 03/07/2025 05:04 PM)

Tool Form **Proposal**

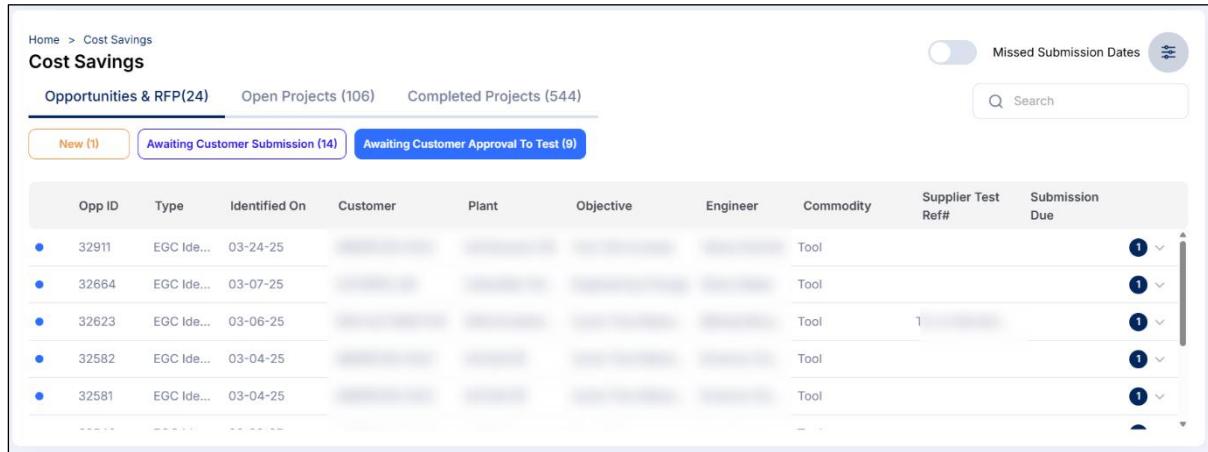
Target CPU Savings	Net savings 1,144.66	Plant Name	Opp.Ref 32553
CPU savings 0.0034		Last Submission Date	Supplier Test Ref#
Current Item		Current	Proposed To EGC
Cost		XXX	16.84
Supplier Item #	XXX XXX XXX		6532124

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



Home > Cost Savings
Cost Savings

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

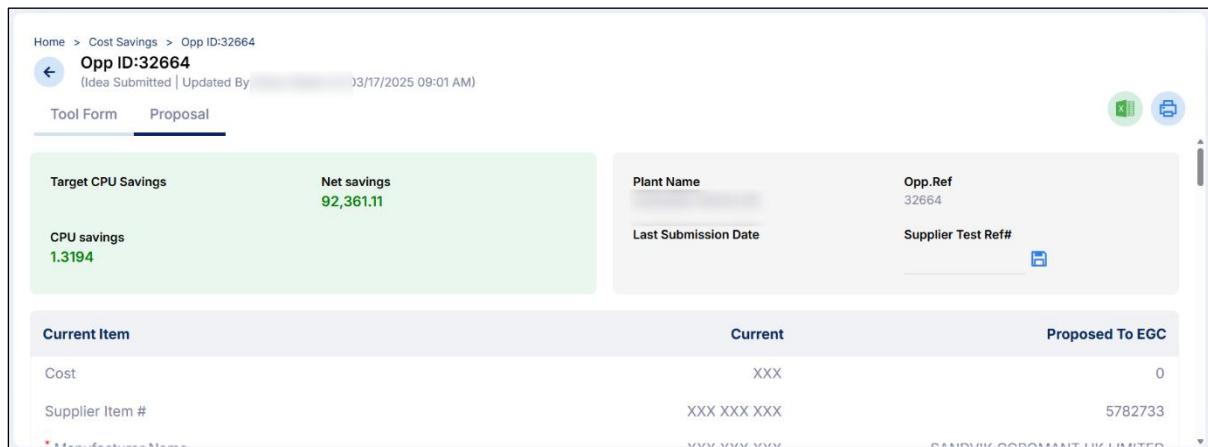
Missed Submission Dates

Search

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



Opp ID:32664
(Idea Submitted | Updated By [redacted] 03/17/2025 09:01 AM)

Tool Form **Proposal**

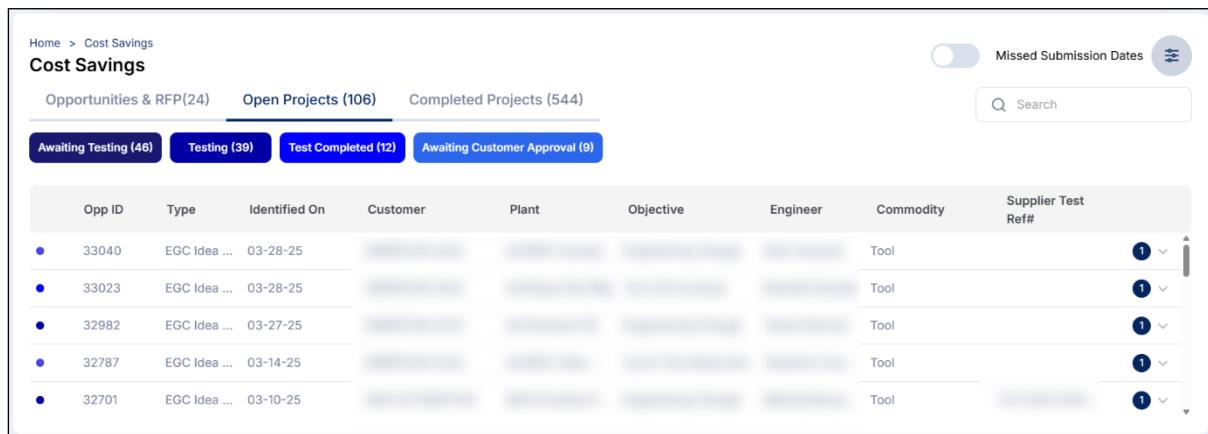
Target CPU Savings	Net savings 92,361.11	Plant Name	Opp.Ref 32664
CPU savings 1,3194		Last Submission Date	Supplier Test Ref# 5782733
Current Item		Current	Proposed To EGC
Cost	XXX	0	
Supplier Item #	XXX XXX XXX	5782733	

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



Home > Cost Savings
Cost Savings

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

Missed Submission Dates

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

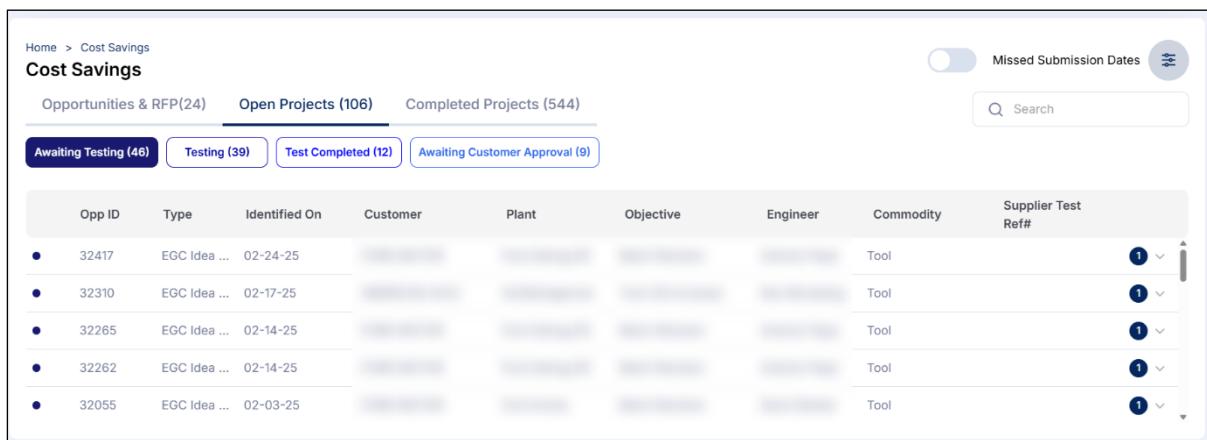
Opp ID	Type	Identified On	Customer	Plant	Objective	Engineer	Commodity	Supplier Test Ref#
33040	EGC Idea ...	03-28-25				Tool		1
33023	EGC Idea ...	03-28-25				Tool		1
32982	EGC Idea ...	03-27-25				Tool		1
32787	EGC Idea ...	03-14-25				Tool		1
32701	EGC Idea ...	03-10-25				Tool		1

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.

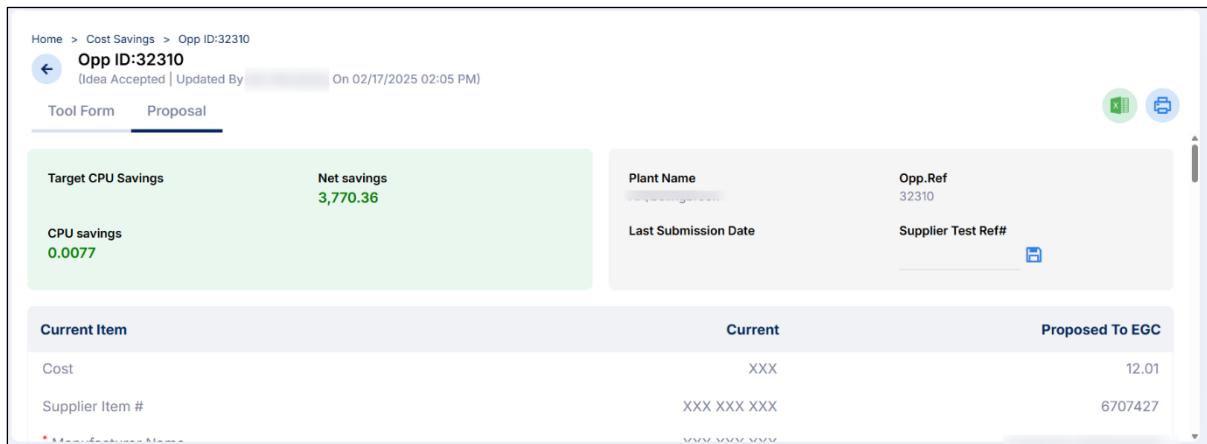
Figure 108: Open Projects - Awaiting Testing



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



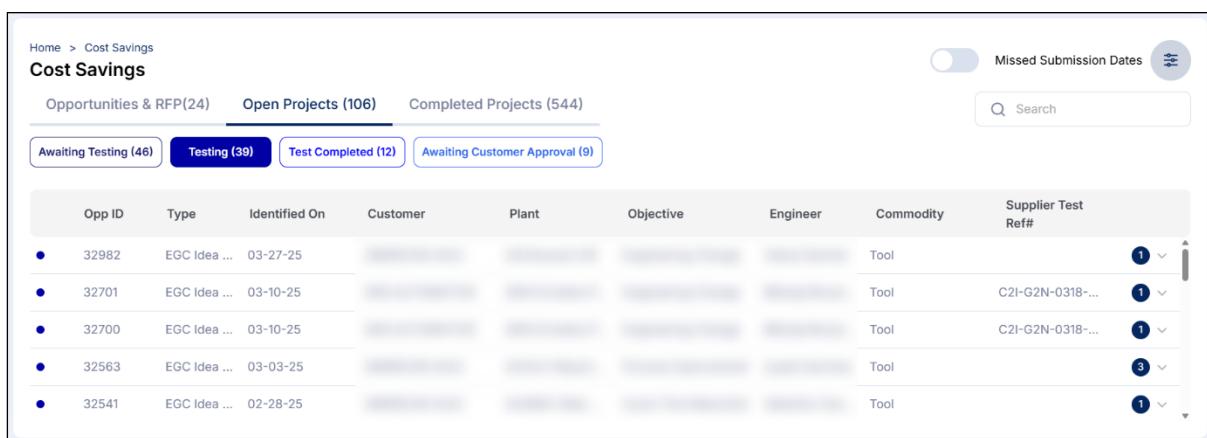
Current Item	Current	Proposed To EGC
Cost	XXX	12.01
Supplier Item #	XXXX XXX XXX	6707427

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.

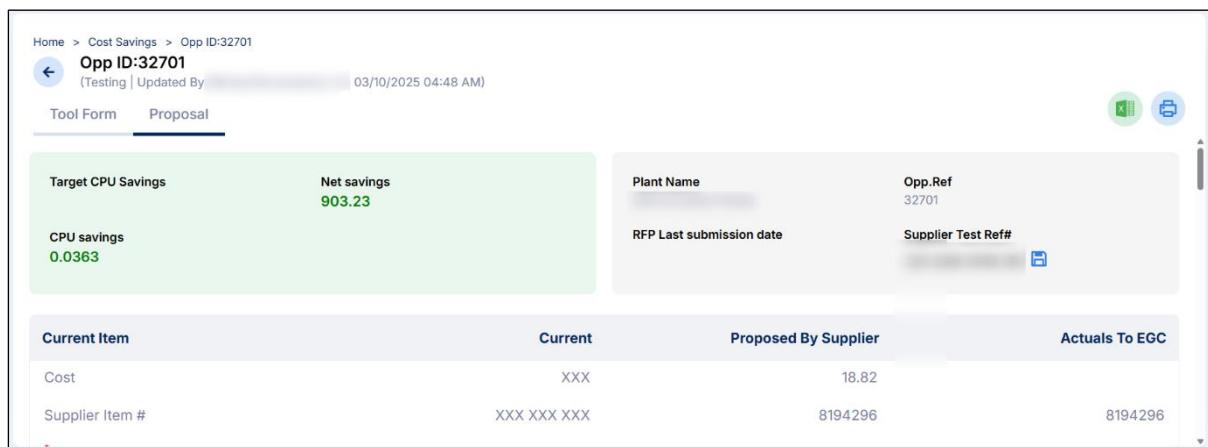
Figure 110: Open Projects - Testing



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



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

Tool Form Proposal

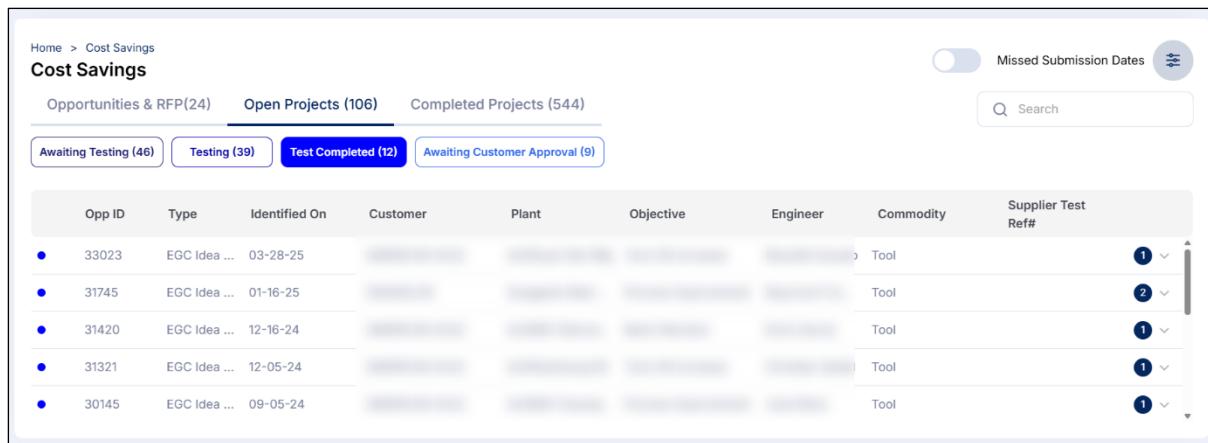
Target CPU Savings	Net savings 903.23	Plant Name	Opp.Ref 32701
CPU savings 0.0363		RFP Last submission date	Supplier Test Ref#
Current Item Cost Supplier Item #		Current XXX XXX XXX XXX	Proposed By Supplier 18.82 8194296
			Actuals To EGC 8194296

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

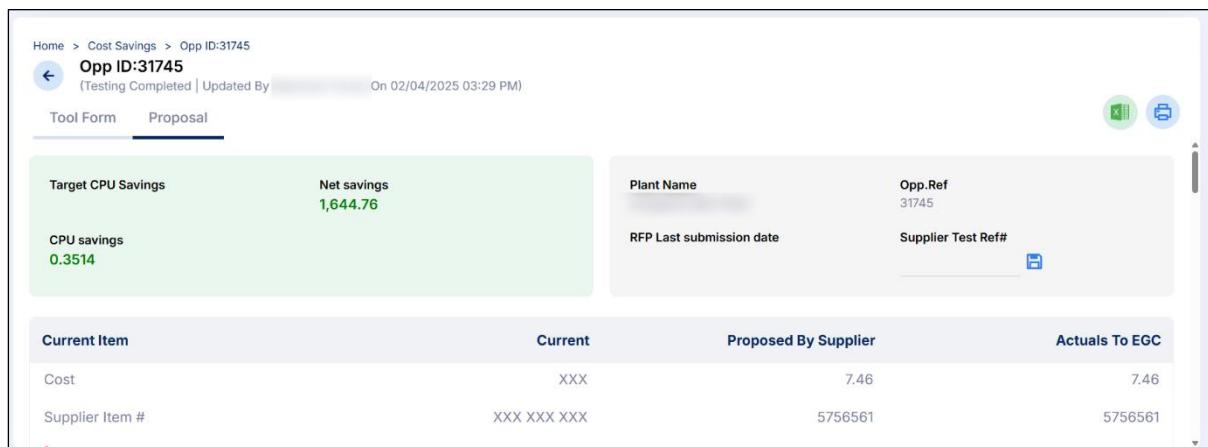
Opportunities & RFP(24) **Open Projects (106)** Completed Projects (544)

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				Tool		1
31745	EGC Idea ...	01-16-25				Tool		2
31420	EGC Idea ...	12-16-24				Tool		1
31321	EGC Idea ...	12-05-24				Tool		1
30145	EGC Idea ...	09-05-24				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

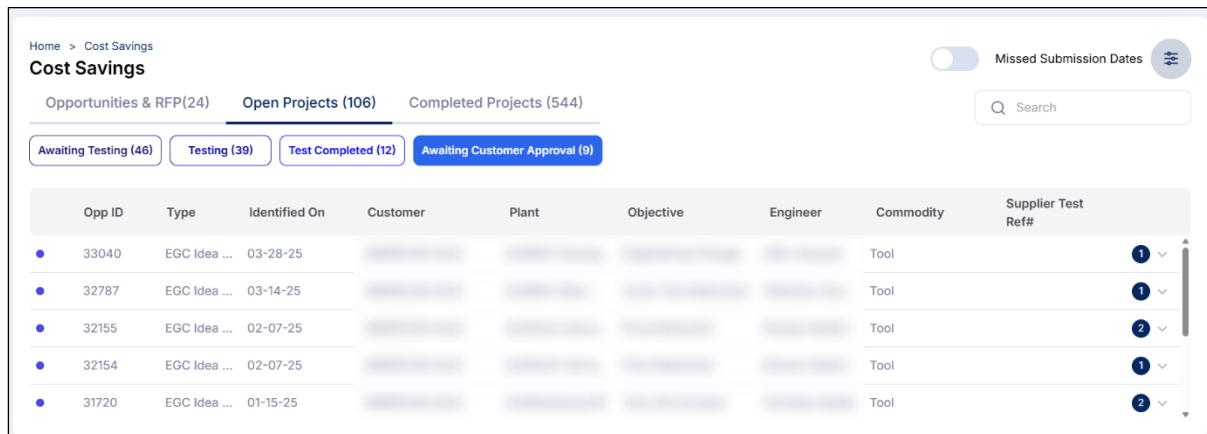
Target CPU Savings	Net savings 1,644.76	Plant Name	Opp.Ref 31745
CPU savings 0.3514		RFP Last submission date	Supplier Test Ref#
Current Item Cost Supplier Item #		Current XXX XXX XXX XXX	Proposed By Supplier 7.46 5756561
			Actuals To EGC 7.46 5756561

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.

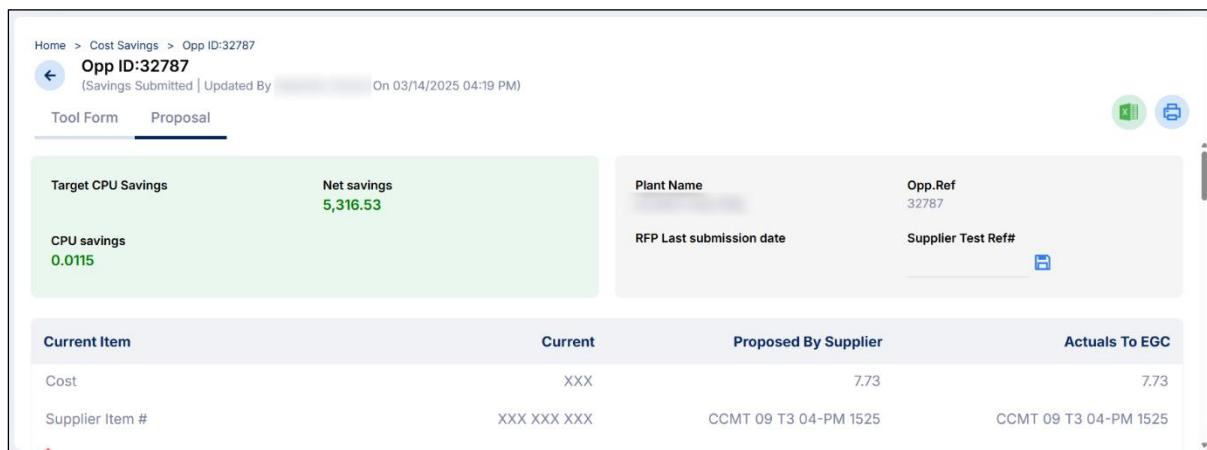
Figure 114: Open Projects - Awaiting Customer Approval



Opp 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

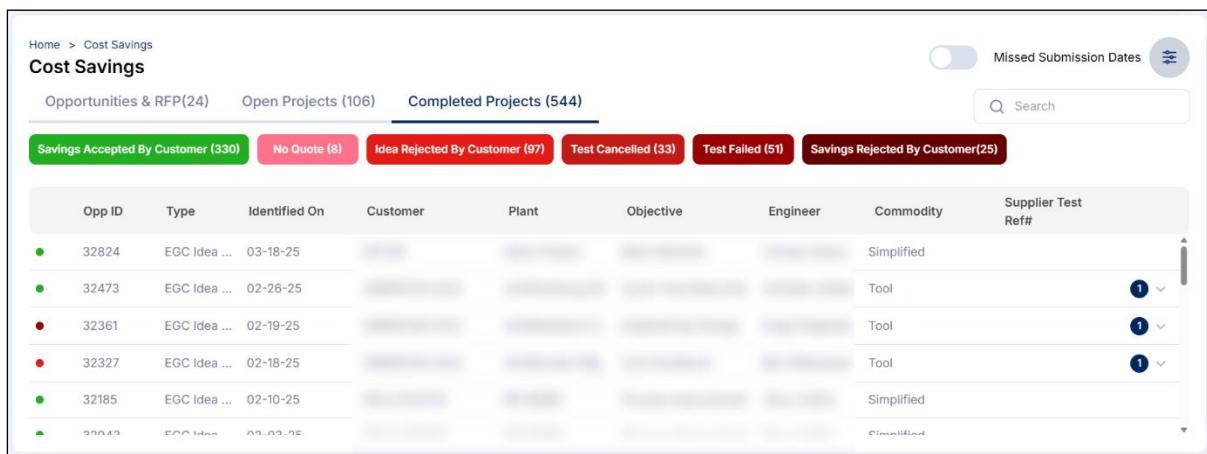


Current Item	Current	Proposed By Supplier	Actuals To EGC
Cost	XXX	7.73	7.73
Supplier Item #	XXX XXX XXXX	CCMT 09 T3 04-PM 1525	CCMT 09 T3 04-PM 1525

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



The screenshot shows the 'Completed Projects' tab in the EGC Supplier Plus interface. The top navigation bar includes 'Home > Cost Savings' and a 'Missed Submission Dates' toggle. Below the navigation are buttons for different project statuses: 'Savings Accepted By Customer (330)', 'No Quote (8)', 'Idea Rejected By Customer (97)', 'Test Cancelled (33)', 'Test Failed (51)', and 'Savings Rejected By Customer (25)'. The main area displays a table with columns: Opp ID, Type, Identified On, Customer, Plant, Objective, Engineer, Commodity, and Supplier Test Ref#. The table lists several completed projects, each with a status indicator (green dot for accepted, red dot for no quote, etc.) and a dropdown menu.

7.3.1 No Quote

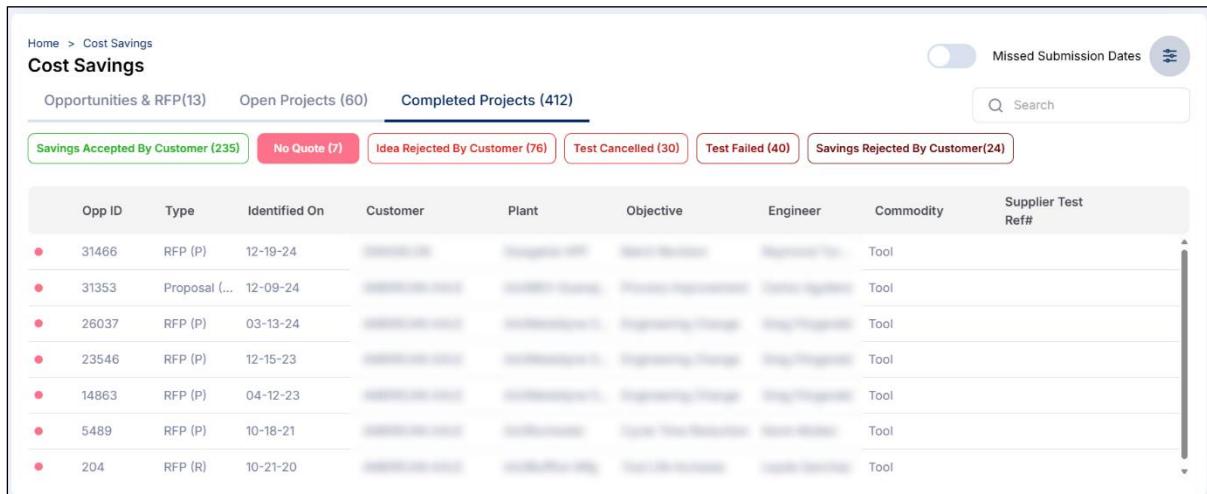
All opportunities that the Supplier User choose not to proceed forward are listed as No Quote projects. The Supplier Partner should enter a reason for not proceeding with the opportunity. The opportunity is set to No Quote if the Supplier User missed the submission date. The submission date by default 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.

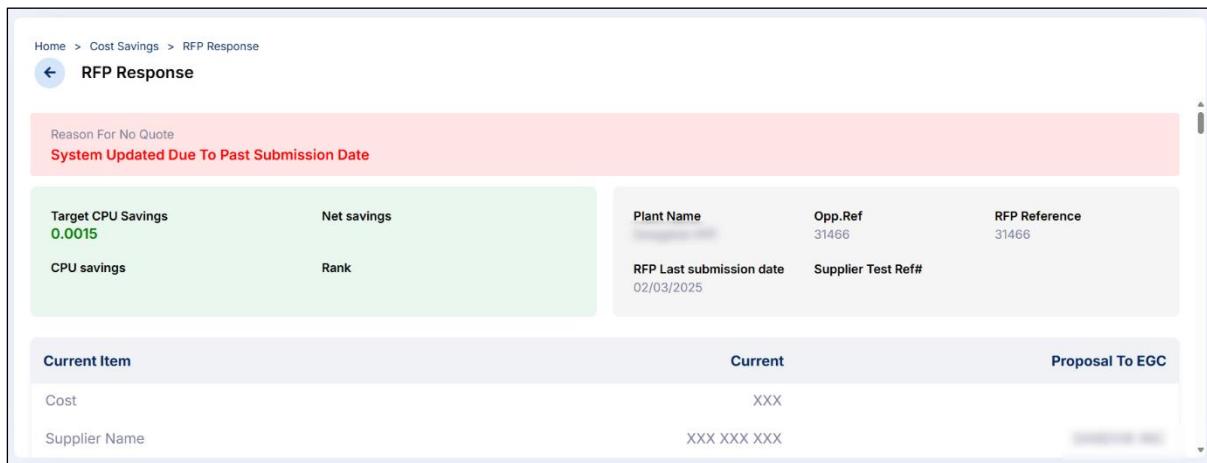
Figure 117: Completed Projects – No Quote



The screenshot shows the 'Completed Projects' tab in the EGC Supplier Plus interface, specifically filtering for 'No Quote' projects. The top navigation bar includes 'Home > Cost Savings' and a 'Missed Submission Dates' toggle. Below the navigation are buttons for different project statuses: 'Savings Accepted By Customer (235)', 'No Quote (7)', 'Idea Rejected By Customer (76)', 'Test Cancelled (30)', 'Test Failed (40)', and 'Savings Rejected By Customer (24)'. The main area displays a table with columns: Opp ID, Type, Identified On, Customer, Plant, Objective, Engineer, Commodity, and Supplier Test Ref#. The table lists seven completed projects, all marked with a red dot and labeled 'No Quote'.

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



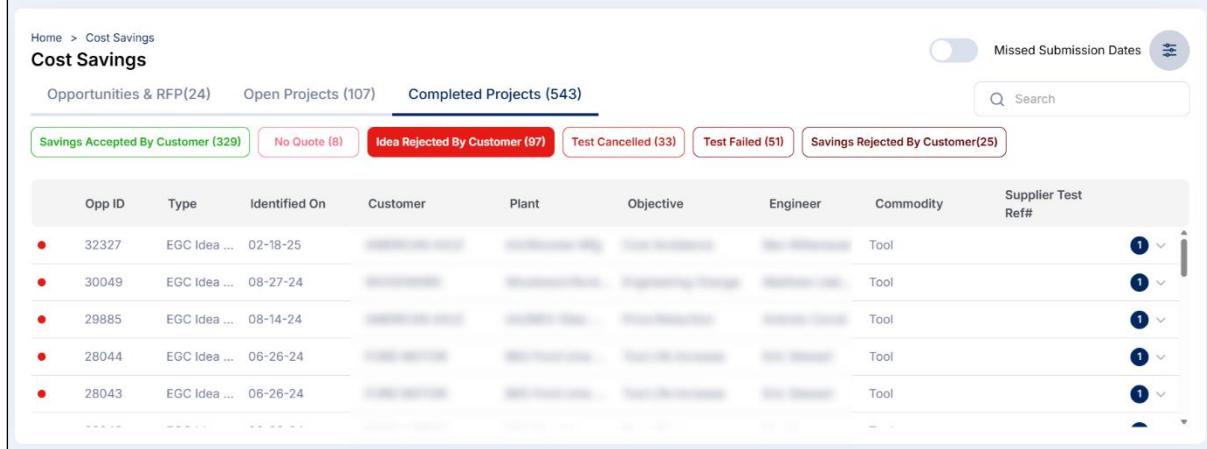
The screenshot shows the 'RFP Response' section of the EGC Supplier Plus interface. At the top, a red banner displays the message 'System Updated Due To Past Submission Date'. Below this, there are two tables. The first table contains 'Target CPU Savings' (0.0015), 'Net savings' (CPU savings), 'Plant Name' (redacted), 'Opp.Ref' (31466), and 'RFP Reference' (31466). The second table shows 'RFP Last submission date' (02/03/2025) and 'Supplier Test Ref#' (redacted). At the bottom, a table lists 'Current Item' (Cost and Supplier Name), 'Current' (XXX and XXX XXX XXX), and 'Proposal To EGC' (redacted).

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



The screenshot shows the 'Completed Projects' tab in the EGC Supplier Plus interface. The top navigation bar includes 'Home > Cost Savings' and 'Cost Savings'. Below the navigation, there are several buttons: '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)', and 'Savings Rejected By Customer (25)'. The 'Idea Rejected By Customer (97)' button is highlighted. The main table lists 97 projects, each with columns for 'Opp ID', 'Type', 'Identified On', 'Customer', 'Plant', 'Objective', 'Engineer', 'Commodity', and 'Supplier Test Ref#'. Each row in the table has a red circular icon with a white number (e.g., 1, 2, 3, 4, 5) and a dropdown arrow.

Click on any specific project to view the details.

Figure 120: Idea Rejected By Customer - Details

7.3.3 Test Cancelled

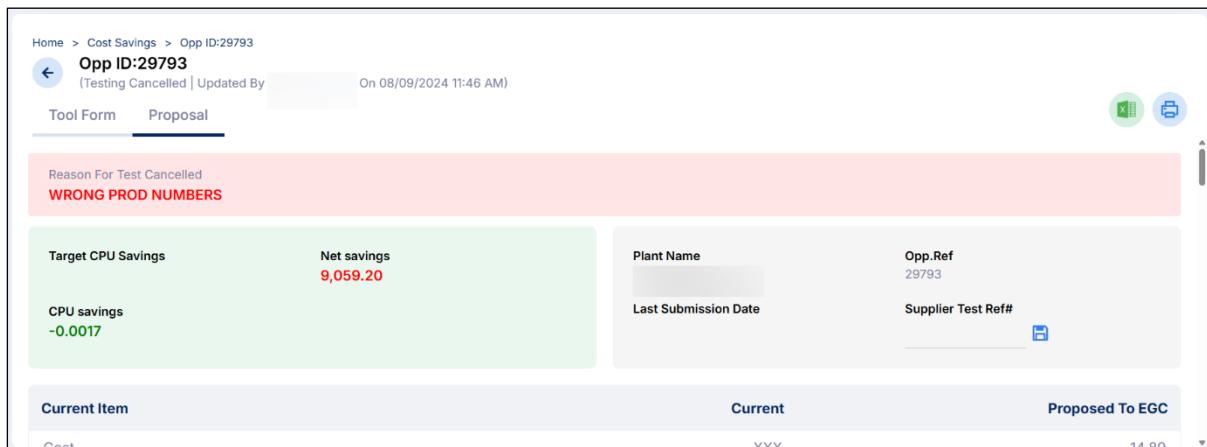
The testing of the proposal proposed can be cancelled at any point of time if the End Customer is not satisfied. These cancelled proposals are listed in the Test Cancelled status of the Completed Projects.

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

Figure 121: Completed Projects – Test Cancelled

Click on any specific project to view the details.

Figure 122: Testing Cancelled details



Opp ID:29793
(Testing Cancelled | Updated By [redacted] On 08/09/2024 11:46 AM)

Tool Form **Proposal**

Reason For Test Cancelled
WRONG PROD NUMBERS

Target CPU Savings	Net savings 9,059.20	Plant Name	Opp.Ref 29793
CPU savings -0.0017		Last Submission Date	Supplier Test Ref# <input type="text"/>

Current Item	Current	Proposed To EGC
Cont	vvv	1.1.00

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



Home > Cost Savings
Cost Savings

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

Missed Submission Dates

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#
32361	EGC Idea ...	02-19-25	[redacted]	[redacted]	[redacted]	[redacted]	Tool	1
31083	EGC Idea ...	11-18-24	[redacted]	[redacted]	[redacted]	[redacted]	Tool	1
30693	EGC Idea ...	10-18-24	[redacted]	[redacted]	[redacted]	[redacted]	Tool	1
30393	EGC Idea ...	09-25-24	[redacted]	[redacted]	[redacted]	[redacted]	Tool	1
30128	EGC Idea ...	09-05-24	[redacted]	[redacted]	[redacted]	[redacted]	Tool	1

Click on any specific project to view the details.

Figure 124: Test Failed

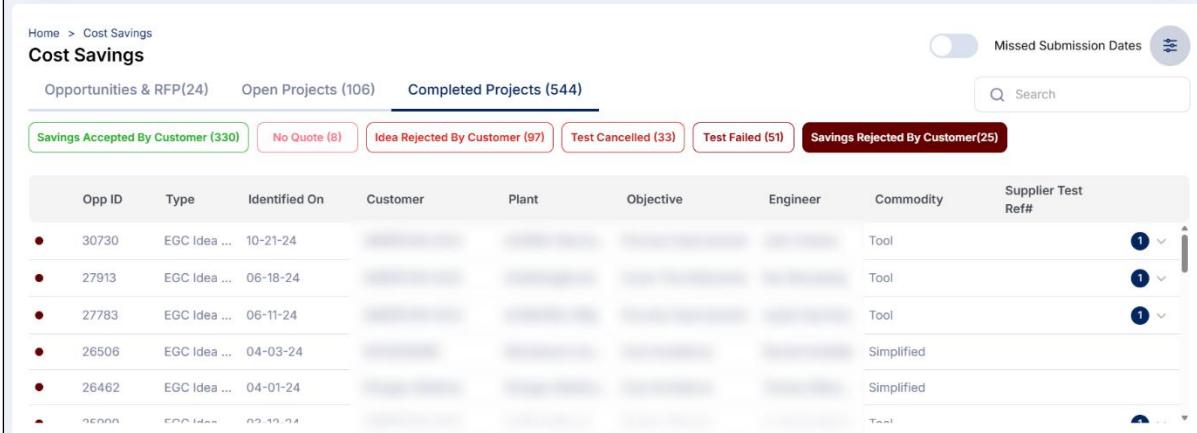


7.3.5 Savings Rejected By Customer

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.

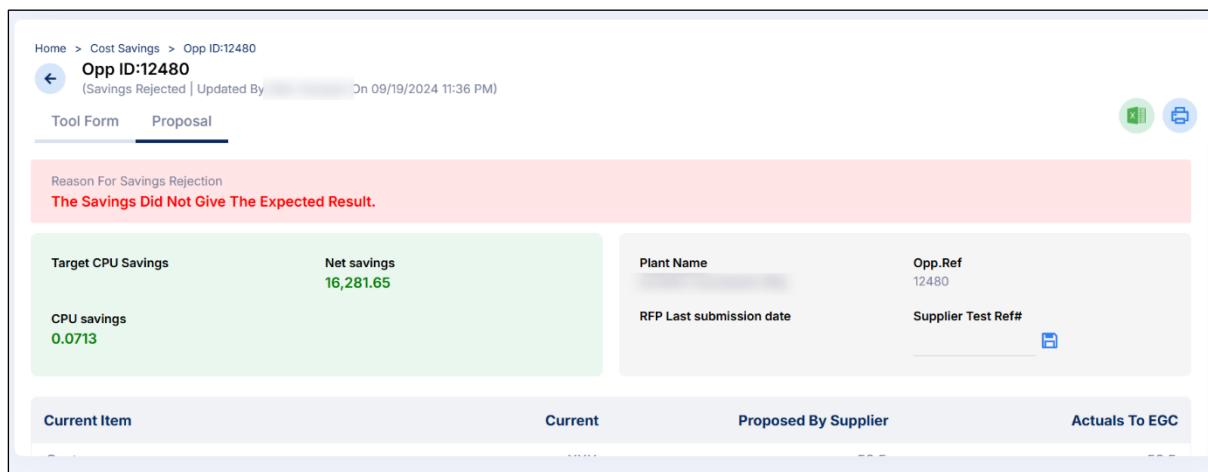
Figure 125: Completed Projects – Savings Rejected By Customer



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 ...	02-12-24					Tool	

Click on any specific project to view the details.

Figure 126: Savings Rejected By Customer

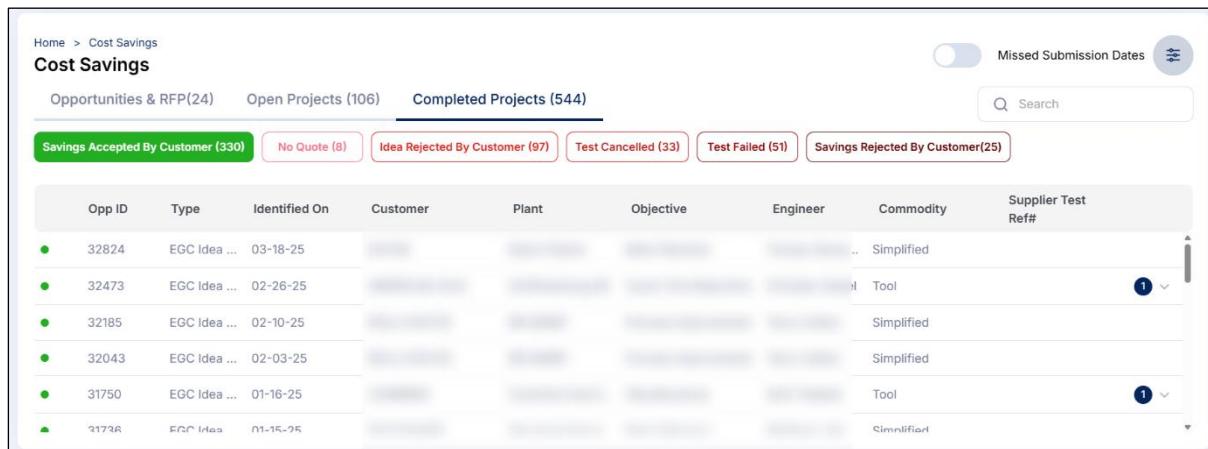


7.3.6 Savings Accepted By Customer

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



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

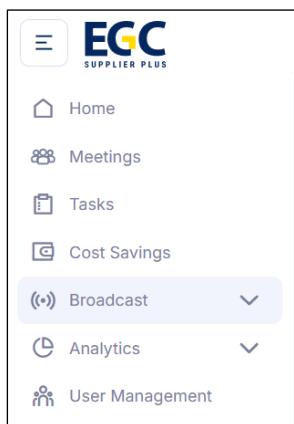
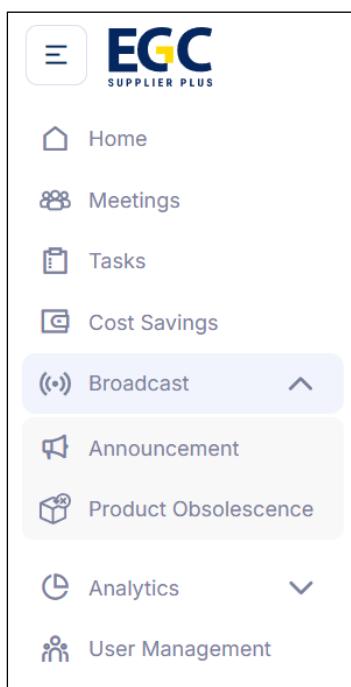
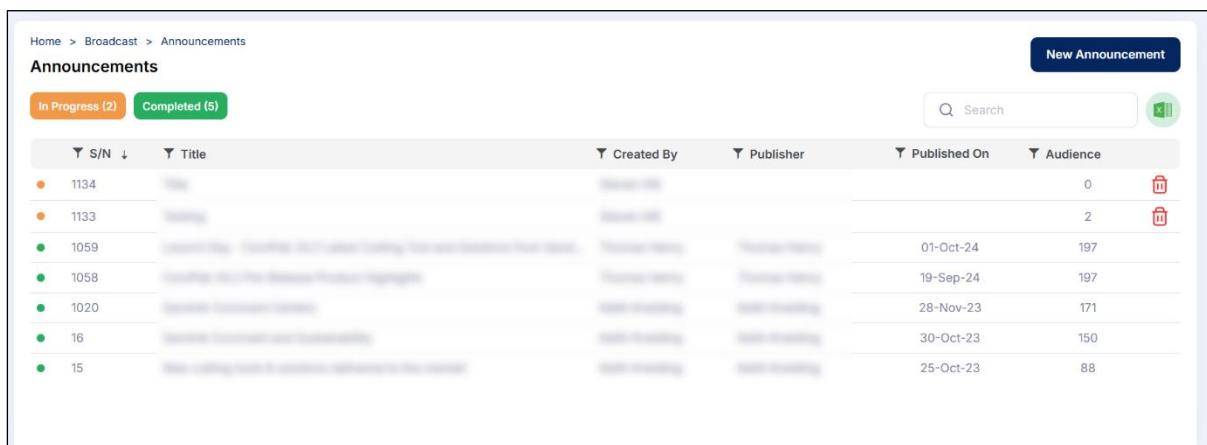


Figure 130: Announcement



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

Figure 131: Announcements



The screenshot shows a list of announcements. At the top right is a 'New Announcement' button. Below it is a search bar with a magnifying glass icon and a refresh icon. The main area is a table with the following data:

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

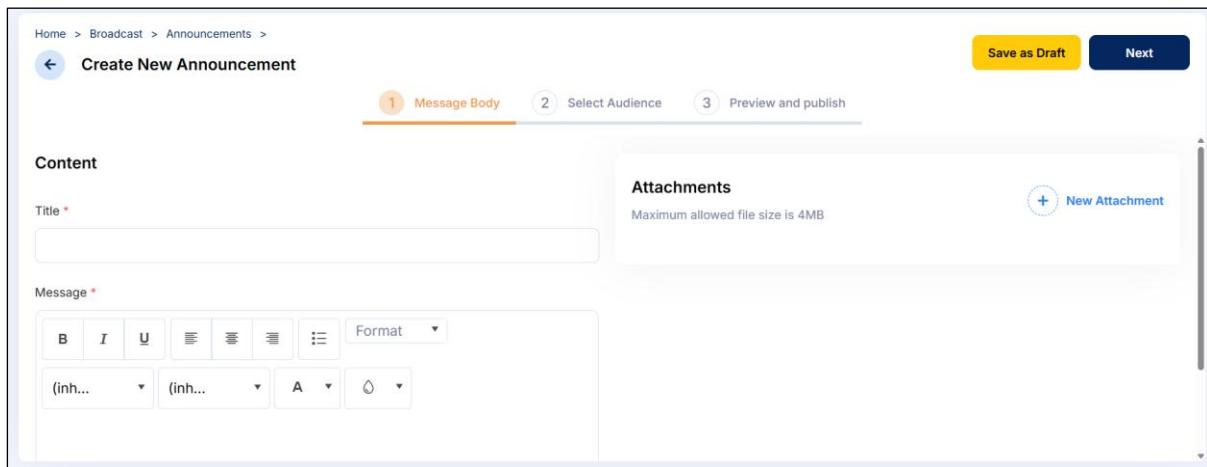
8.1.1 New Announcement

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.



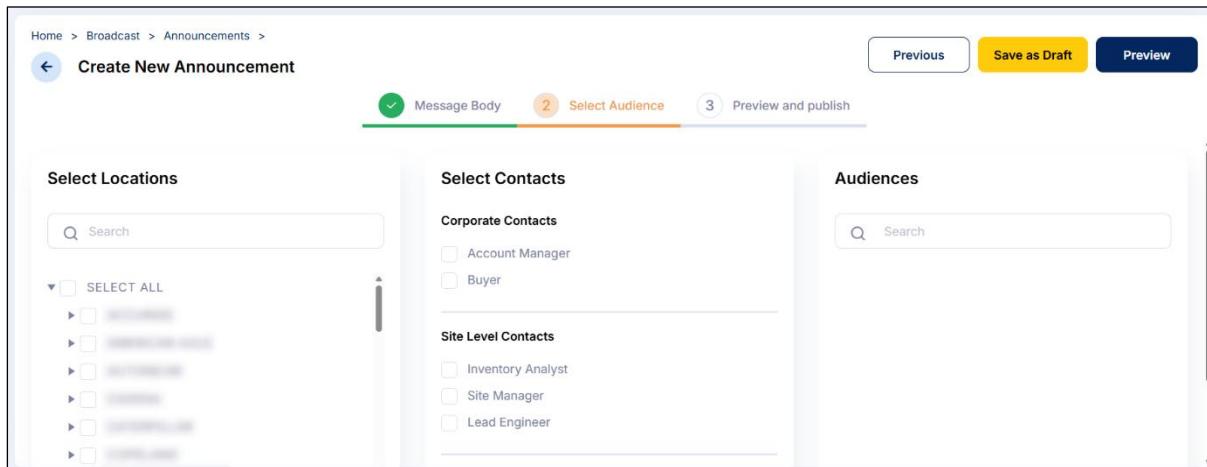
All fields are mandatory

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.

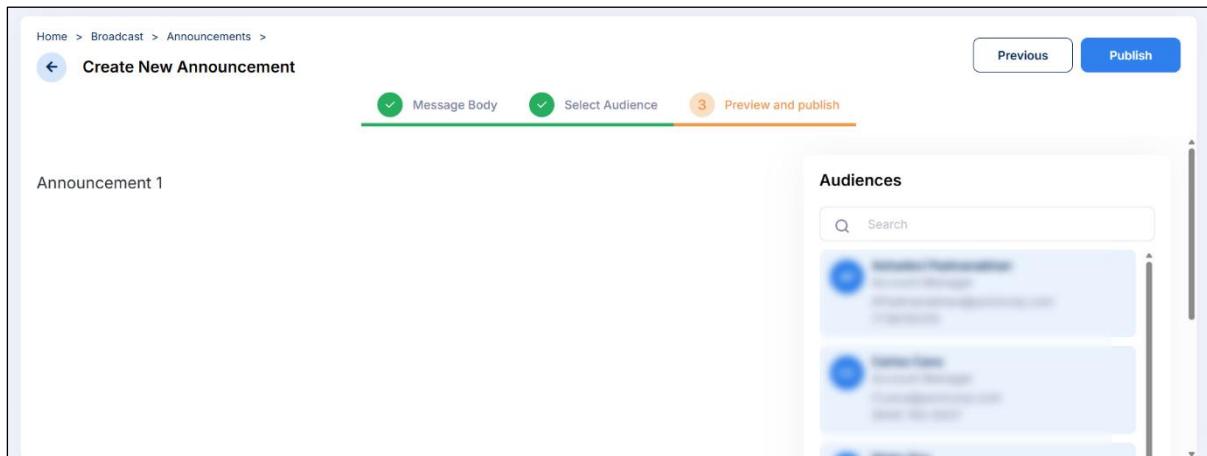
5. Click **Preview** to preview the Announcement, the **Preview and Publish** tab is displayed.



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

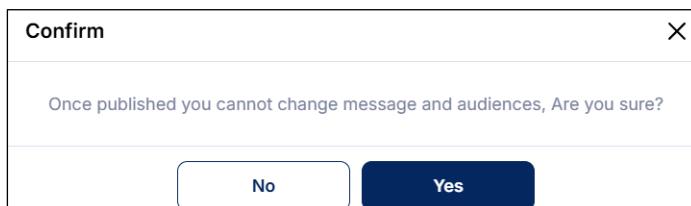
*Click **Previous** to go back to the Message Body tab*

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



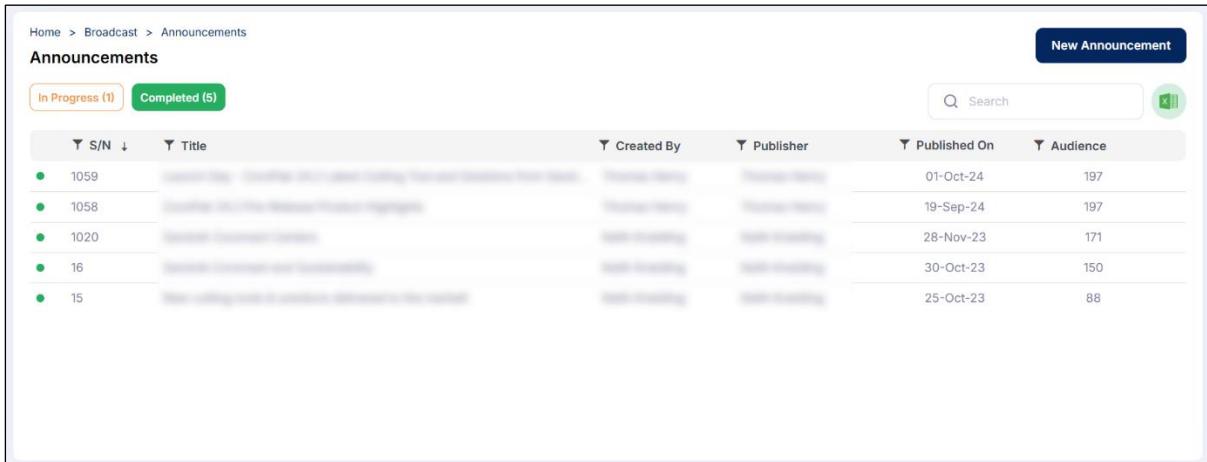
7. Click **Yes** to publish the announcement. The audience will receive the announcement email, and the announcement will be updated in the announcement list.

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

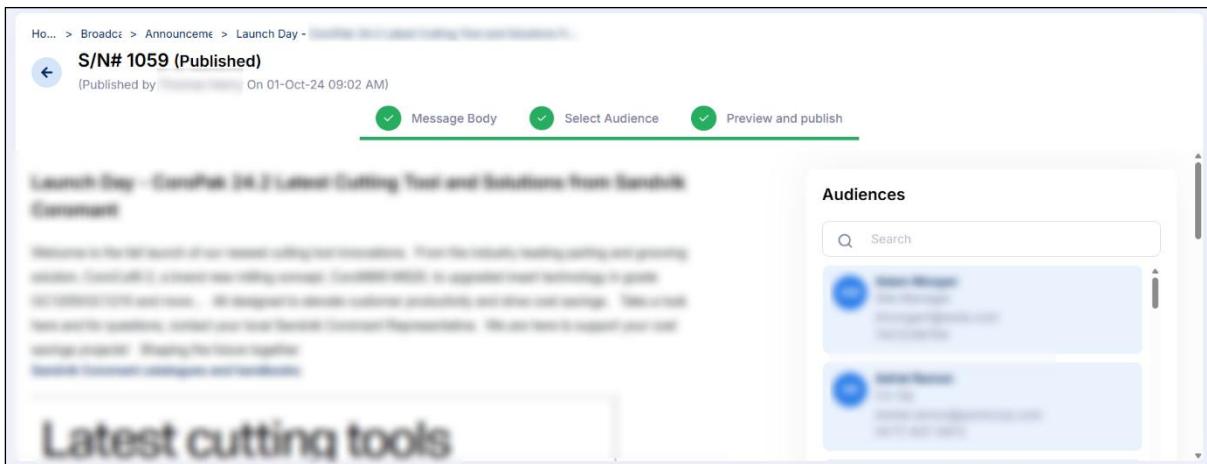


The screenshot shows a grid of completed announcements. The columns are: S/N, Title, Created By, Publisher, Published On, and Audience. The data is as follows:

S/N	Title	Created By	Publisher	Published On	Audience
1059	Launch Day - EuroPak 34.2 Latest Cutting Tools and Solutions from Sarcos	System Admin	System Admin	01-Oct-24	197
1058	Launch Day - EuroPak 34.2 Latest Cutting Tools and Solutions from Sarcos	System Admin	System Admin	19-Sep-24	197
1020	Launch Day - EuroPak 34.2 Latest Cutting Tools and Solutions from Sarcos	System Admin	System Admin	28-Nov-23	171
16	Launch Day - EuroPak 34.2 Latest Cutting Tools and Solutions from Sarcos	System Admin	System Admin	30-Oct-23	150
15	Launch Day - EuroPak 34.2 Latest Cutting Tools and Solutions from Sarcos	System Admin	System Admin	25-Oct-23	88

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

Figure 137: View announcement



The screenshot shows the details of an announcement. The title is "S/N# 1059 (Published)". The announcement content is: "Welcome to the 34.2 Launch of our latest cutting tool innovations. From the latest in metal cutting to precision cutting, EuroPak is excited to introduce new cutting tools. This announcement is a great opportunity to showcase our latest cutting tools. All designs are made with precision and durability in mind. We invite you to explore our website, contact our team, or visit our showroom for more information. We are here to support you every step of the way.祝您生意兴隆！感谢您的支持和关注。" Below the content, there is a section titled "Latest cutting tools". On the right, there is a "Audiences" section with a search bar and two audience entries: "Global Audience" and "North America".

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

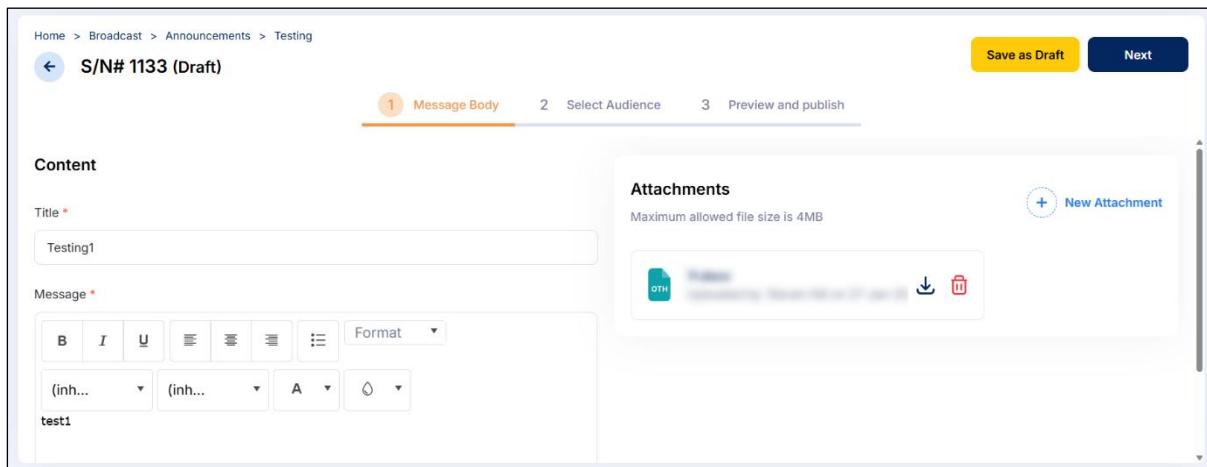


The screenshot shows a grid of in-progress announcements. The columns are: S/N, Title, Created By, Publisher, Published On, and Audience. The data is as follows:

S/N	Title	Created By	Publisher	Published On	Audience
1133	Launch Day - EuroPak 34.2 Latest Cutting Tools and Solutions from Sarcos	System Admin	System Admin	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.



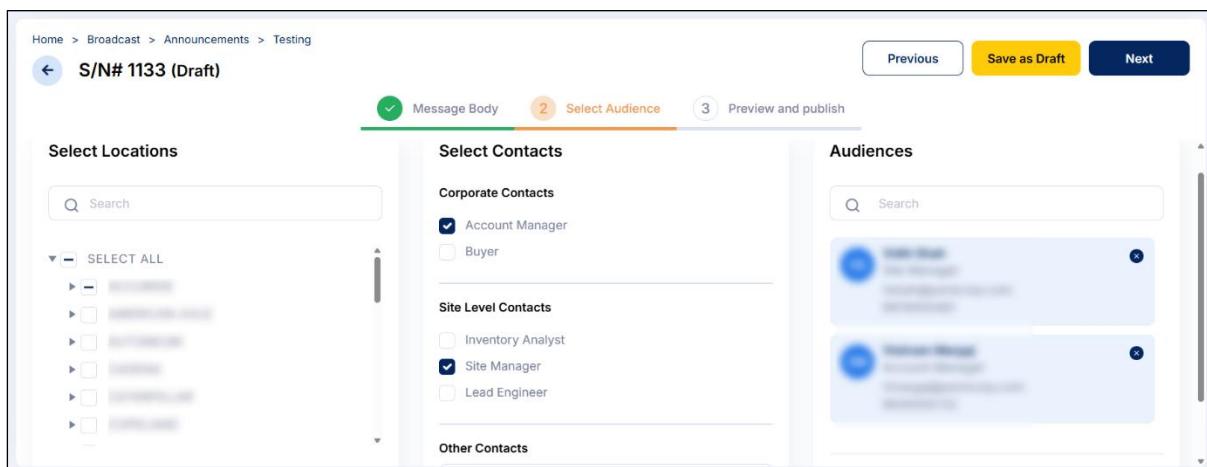
*Attachment can be deleted by clicking the delete icon adjacent to the uploaded file.
The uploaded attachment can be downloaded.*

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**

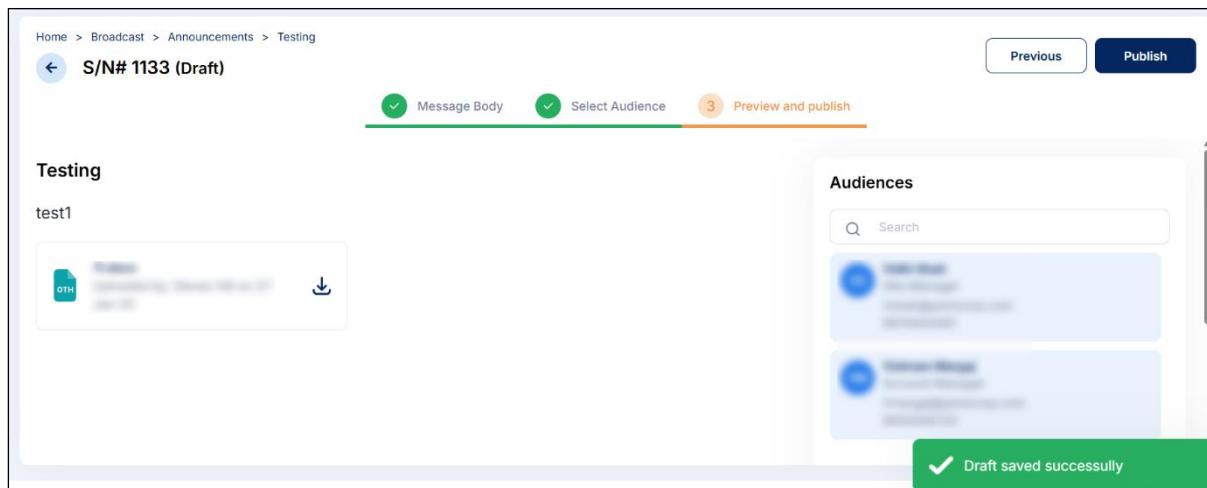
- Search **Audience** using the Search bar.

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



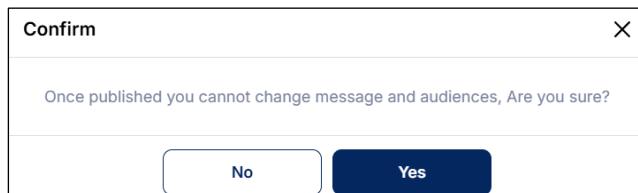
*Click **Save as Draft** to save the announcement and publish it later.
Click **Previous** to go back to the Message Body tab*

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



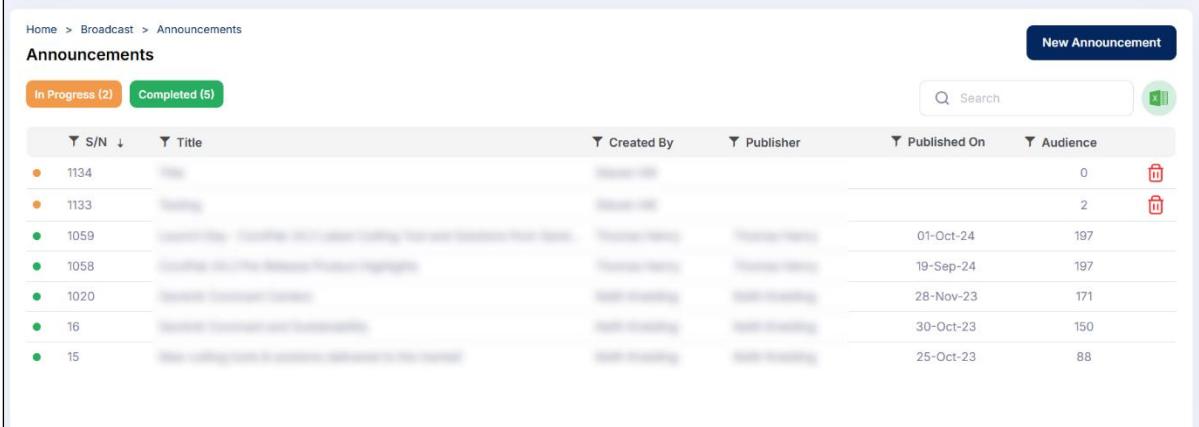
8. Click **Yes** to publish the announcement. The audience will receive the announcement email, and the announcement will be updated in the announcement list.

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.

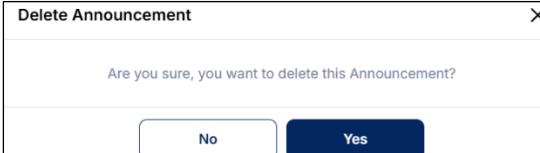
Figure 143: Announcements



Announcements					
		Created By	Publisher	Published On	Audience
●	1134	Supplier Plus	Supplier Plus	01-Oct-24	0
●	1133	Supplier Plus	Supplier Plus	19-Sep-24	2
●	1059	Supplier Plus	Supplier Plus	28-Nov-23	197
●	1058	Supplier Plus	Supplier Plus	30-Oct-23	197
●	1020	Supplier Plus	Supplier Plus	16-Oct-23	171
●	16	Supplier Plus	Supplier Plus	30-Oct-23	150
●	15	Supplier Plus	Supplier Plus	25-Oct-23	88

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

Figure 144: 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

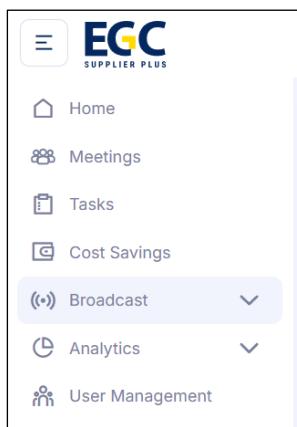
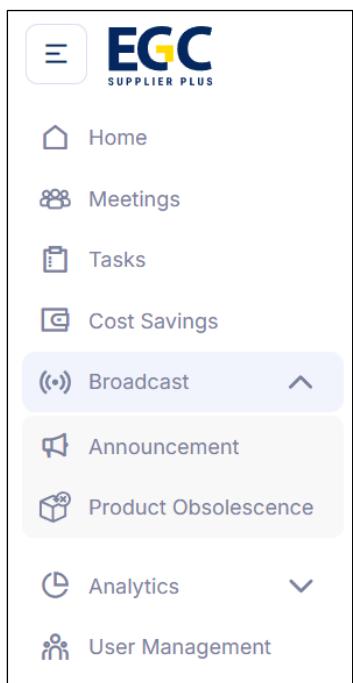
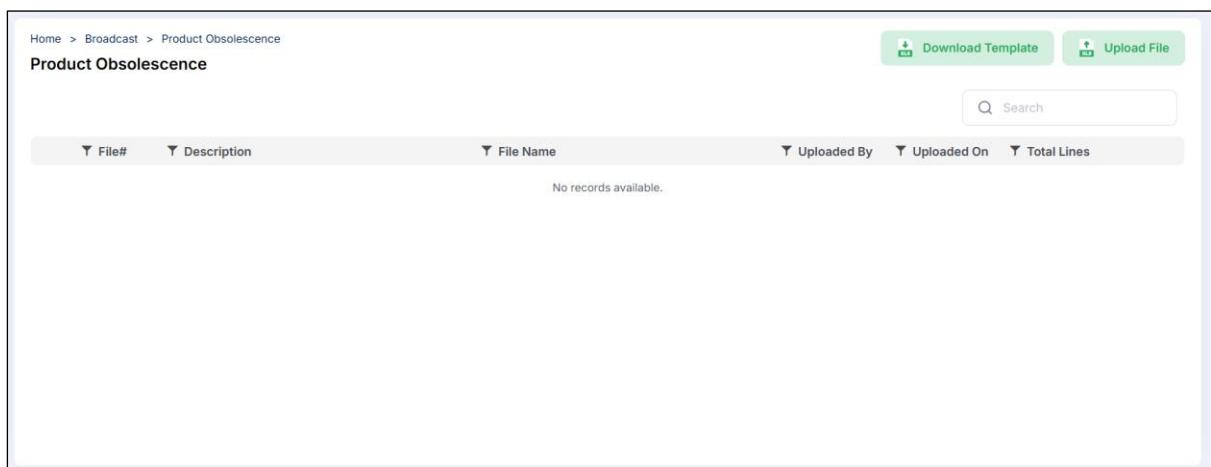


Figure 146: Product Obsolescence



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

Figure 147: Product Obsolescence



The screenshot shows the 'Product Obsolescence' list page. The top navigation bar shows 'Home > Broadcast > Product Obsolescence'. On the right, there are 'Download Template' and 'Upload File' buttons. Below the navigation is a search bar with a magnifying glass icon. The main content area has a header with columns: File#, Description, File Name, Uploaded By, Uploaded On, and Total Lines. A message 'No records available.' is displayed in the center of the list area.

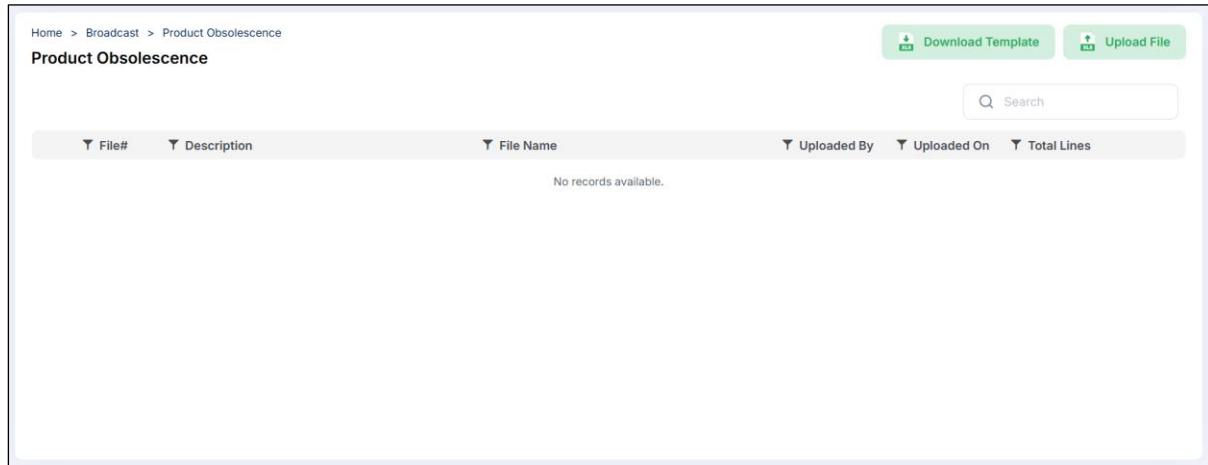
8.2.1 Upload Product Obsolescence files

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

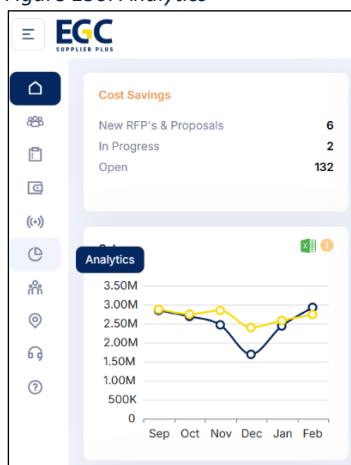
The cost savings of the company and their sites can be viewed against the targets enabling the Supplier User to visualize how far they are from the target.

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:

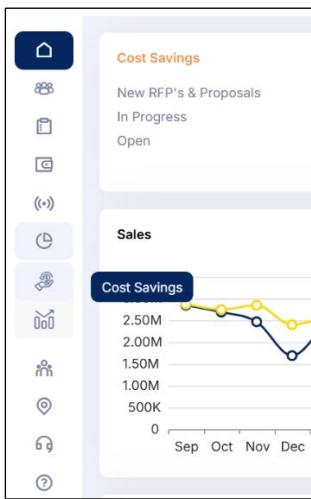
1. Login to the application.
2. In the main menu, click **Analytics**. The sub-categories are displayed in the menu.

Figure 150: Analytics



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

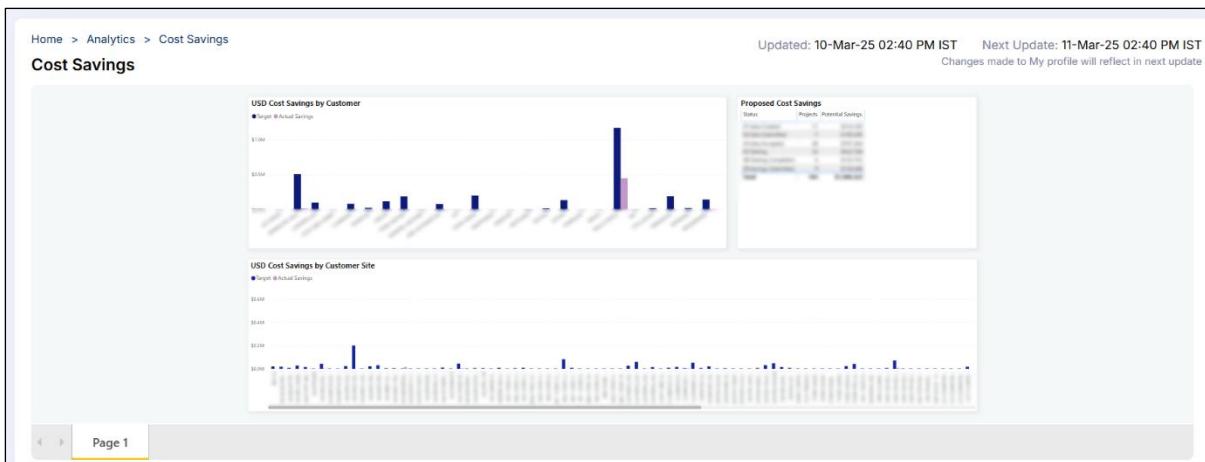
Figure 151: Cost Savings menu



4. The cost savings screen displays the following:

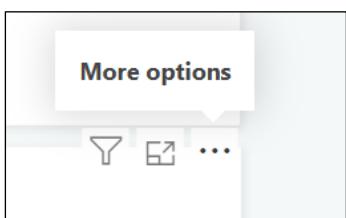
- **USD Cost Savings by Customer:** The graph displays the target and the actual savings of each customer. By default, all the End Customer data is displayed. Target is displayed in blue and actual implemented cost savings are displayed in purple.
- **USD Cost Savings by End Customer Site:** The graph 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



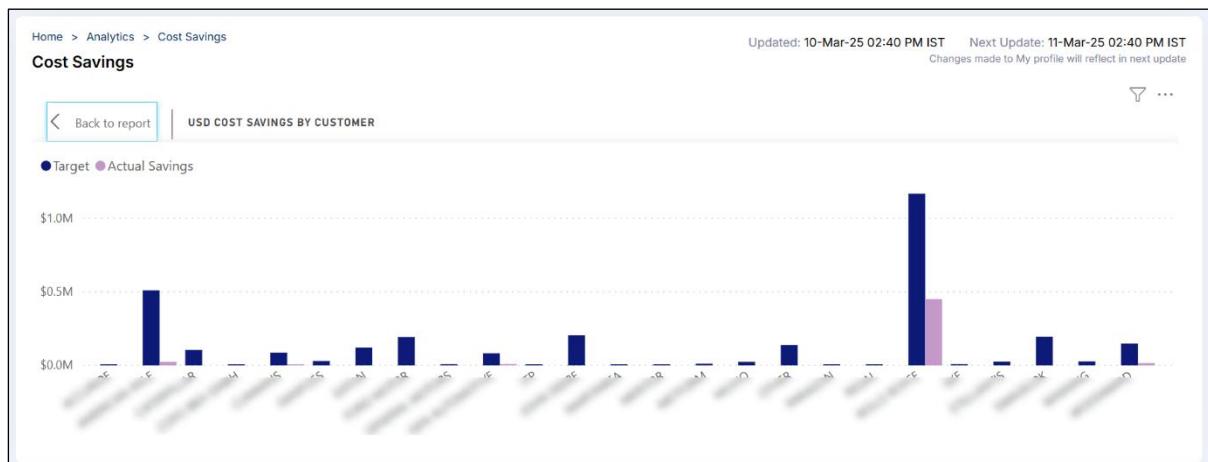
- **Filter:** Enables to view the filters and slicers (allow users to filter and view specific subsets of data in a graph or chart) affecting the displayed graph

Figure 154: Filter option



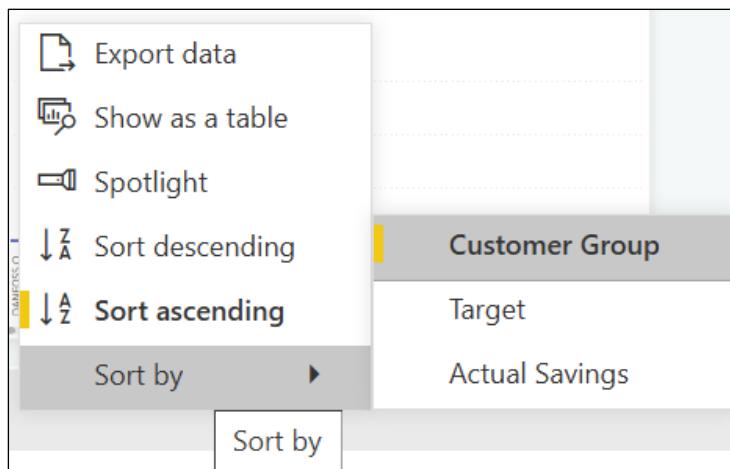
- **Focus mode:** Enables to expand the graph/table for clearer view.

Figure 155: Focus Mode



- **More options**

Figure 156: Hover-more options



Clicking More options enables the user to perform the following:

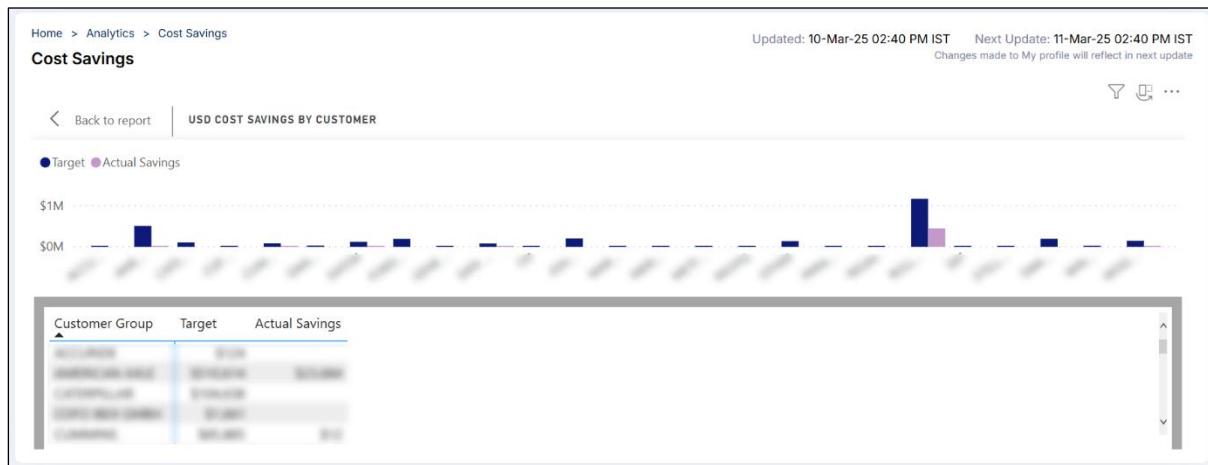
- **Export Data:** Enables to export graph/table data to an Excel file.



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

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

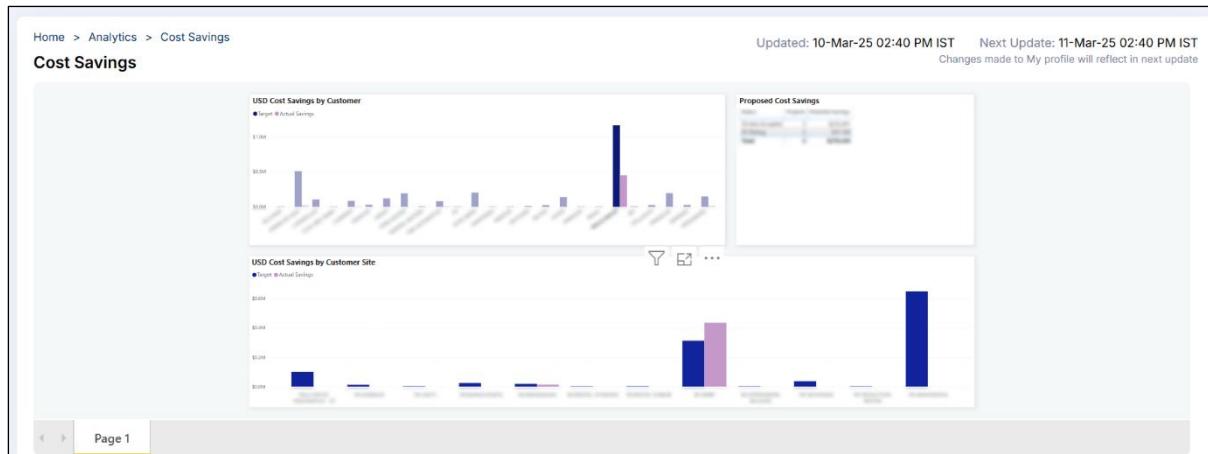
Figure 157: Show as table



- **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**

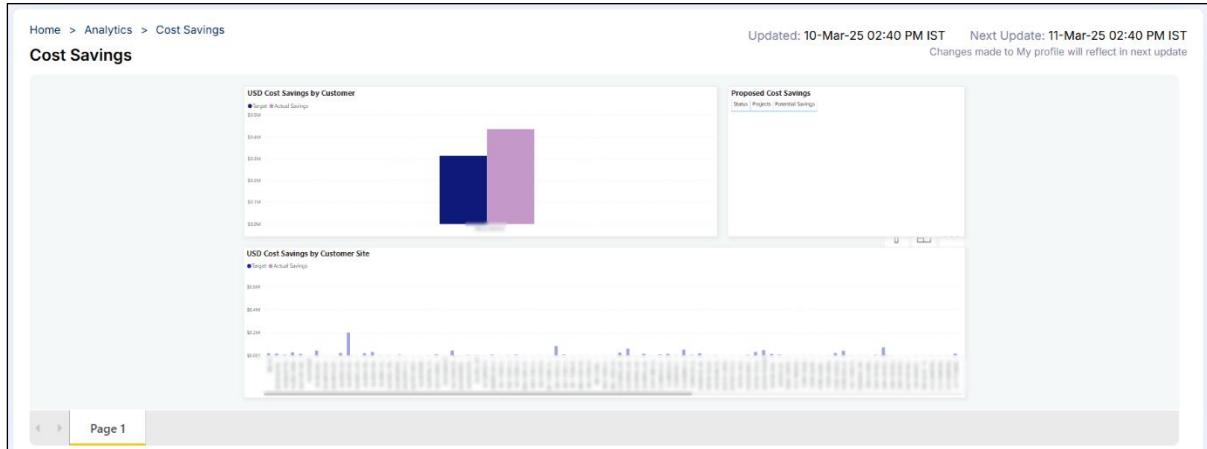
Clicking/selecting on specific End Customer/company in the Cost savings by customer graph, the specific End Customer sites are displayed and proposed cost savings are updated accordingly.

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.

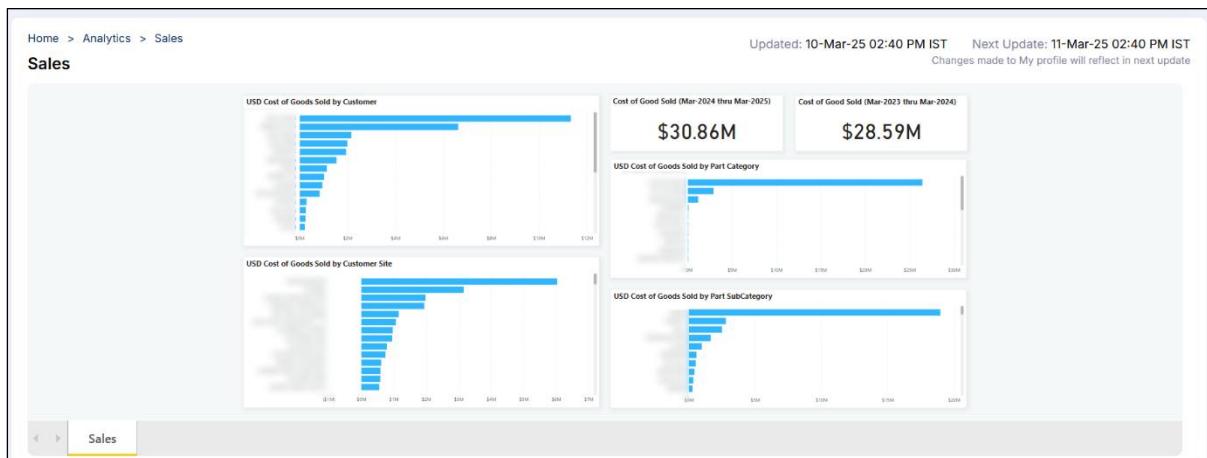
Figure 159: Selecting specific site



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

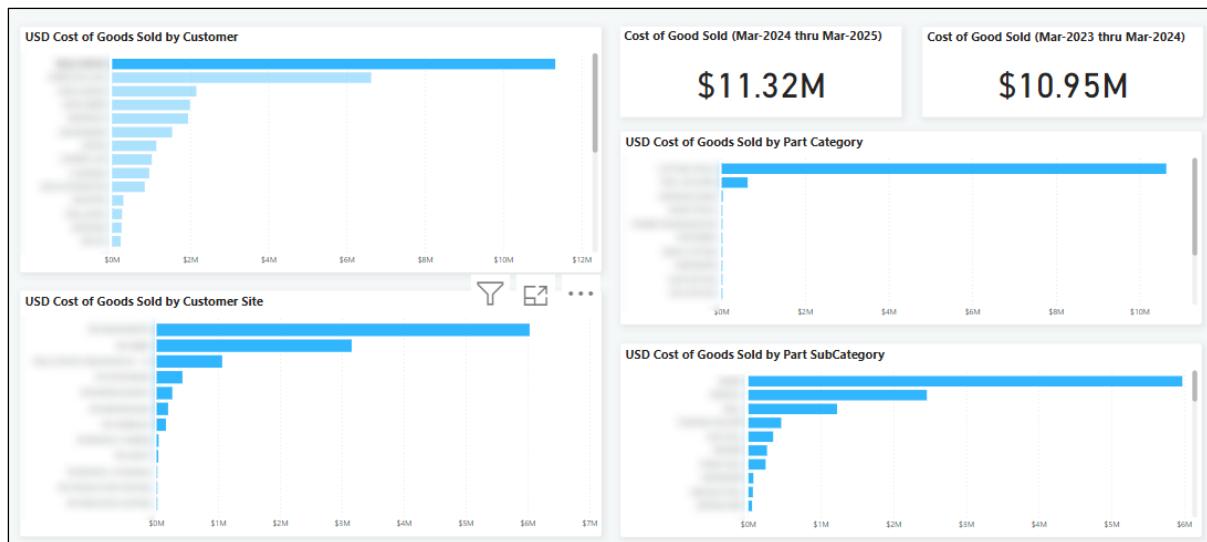


Hovering over specific bar of the graph displays the following:

- **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**

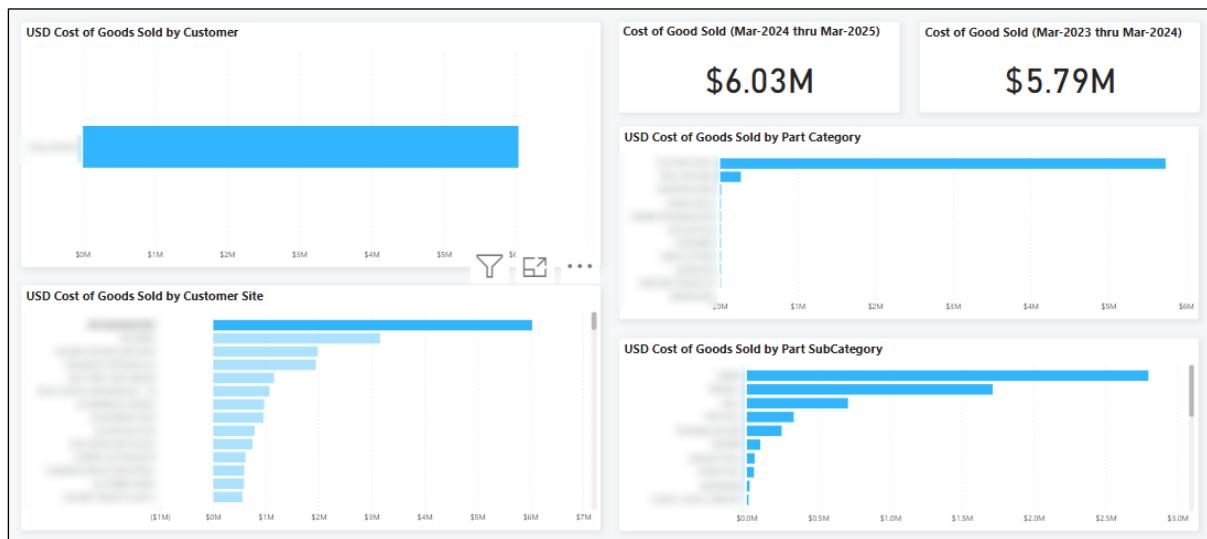
Clicking on a specific customer will display only the specific customer sites in the **USD Cost of Goods Sold in customer site** graph.

Figure 161: Sales for specific customer



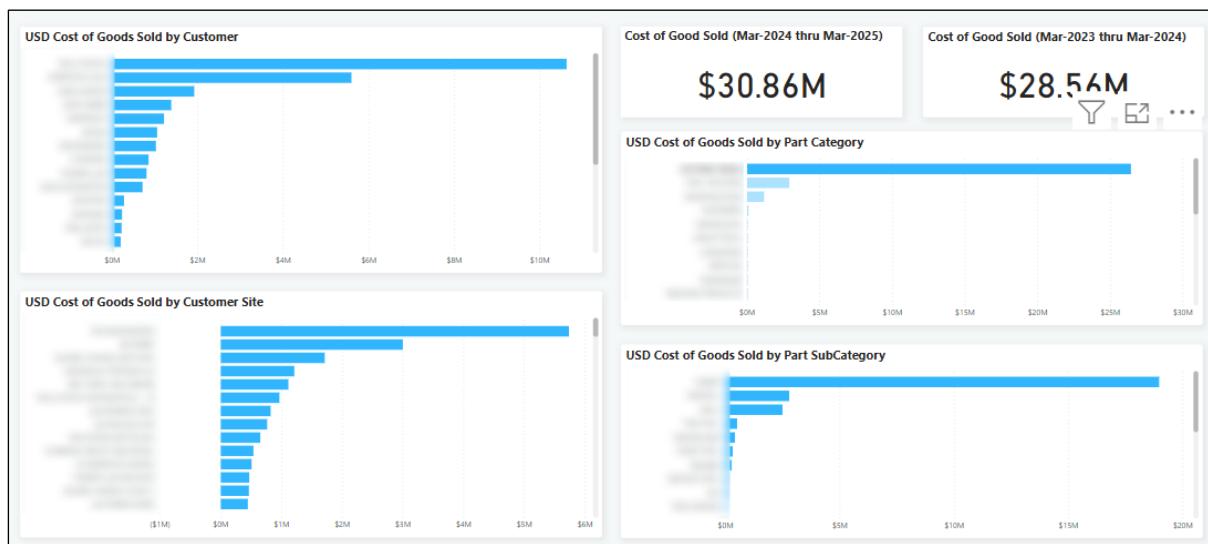
Clicking specific customer site will display the specific customer, and **Cost of Goods Sold (COGS) by part category and sub part category**.

Figure 162: Sales for specific customer site



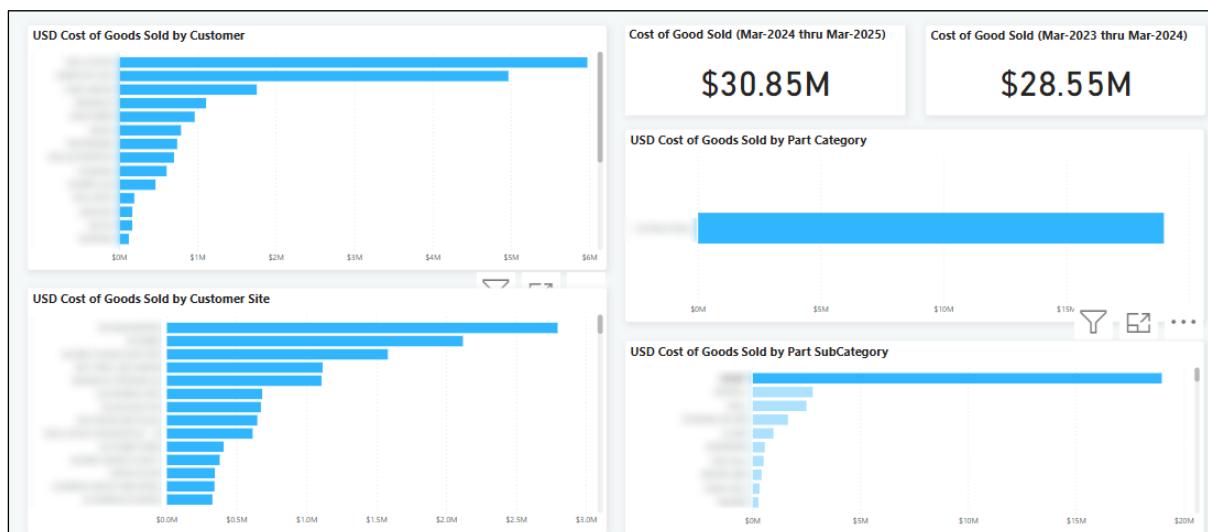
Clicking on a specific part category will display the Cost of Goods Sold (COGS) pertaining to the part category for customers/sites and their respective subcategory cost.

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)

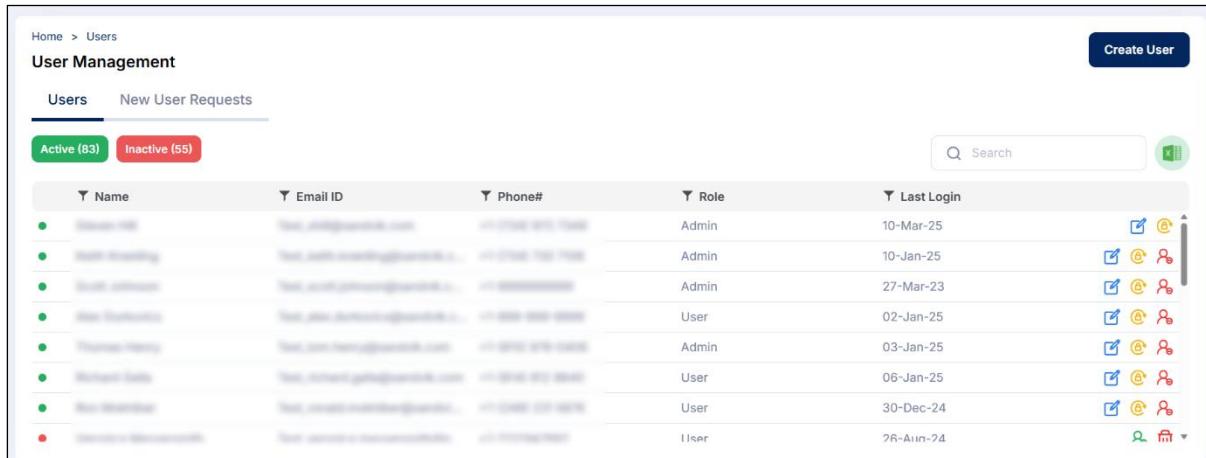
The User Management module enables administrators to create new users, monitor both active and inactive accounts, and manage user requests pending approval. Additionally, the module facilitates essential functions such as deleting, activating, deactivating, changing passwords, and editing user details, 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



User Management				
Home > Users				
Create User				
Users New User Requests				
Active (83) Inactive (55)				<input type="text" value="Search"/> X
Name	Email ID	Phone#	Role	Last Login
John Doe	John.Doe@supplierplus.com	123-4567-8900	Admin	10-Mar-25
Sarah Johnson	Sarah.Johnson@supplierplus.com	123-4567-8900	Admin	10-Jan-25
David Williams	David.Williams@supplierplus.com	123-4567-8900	Admin	27-Mar-23
Emily Thompson	Emily.Thompson@supplierplus.com	123-4567-8900	User	02-Jan-25
Michael Brown	Michael.Brown@supplierplus.com	123-4567-8900	Admin	03-Jan-25
Robert Green	Robert.Green@supplierplus.com	123-4567-8900	User	06-Jan-25
Emily Davis	Emily.Davis@supplierplus.com	123-4567-8900	User	30-Dec-24
Michael Johnson	Michael.Johnson@supplierplus.com	123-4567-8900	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 deactivate an active user.

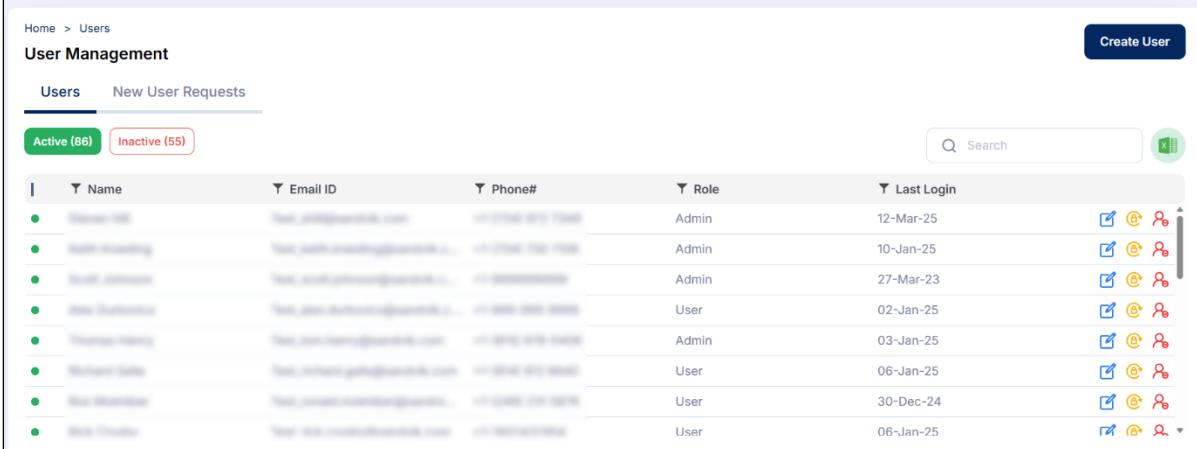
10.1.1 Edit User

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.

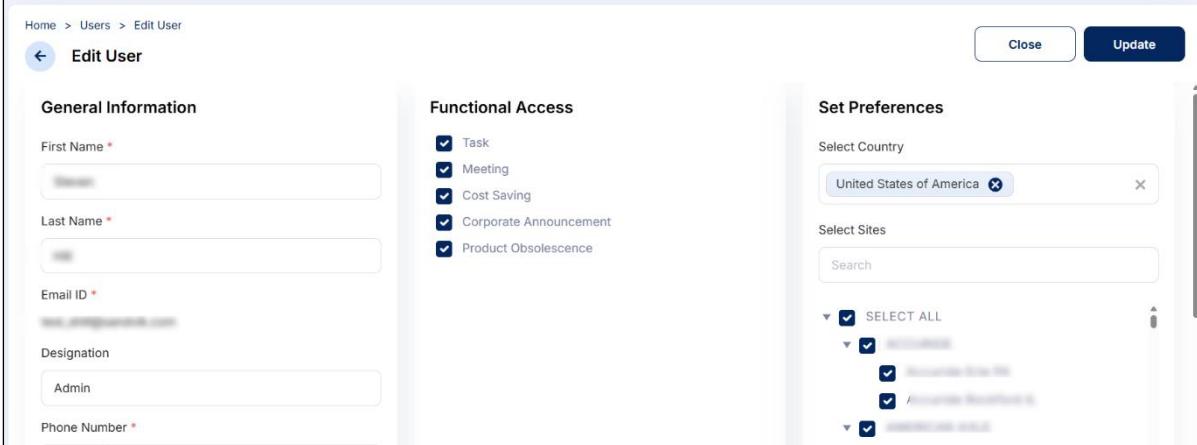
Figure 166: Active Users



Name	Email ID	Phone#	Role	Last Login	Actions
Admin	Admin@supplierplus.com	123-456-7890	Admin	12-Mar-25	  
Admin	Admin@supplierplus.com	123-456-7890	Admin	10-Jan-25	  
Admin	Admin@supplierplus.com	123-456-7890	Admin	27-Mar-23	  
User	User@supplierplus.com	123-456-7890	User	02-Jan-25	  
Admin	Admin@supplierplus.com	123-456-7890	Admin	03-Jan-25	  
User	User@supplierplus.com	123-456-7890	User	06-Jan-25	  
User	User@supplierplus.com	123-456-7890	User	30-Dec-24	  
User	User@supplierplus.com	123-456-7890	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 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

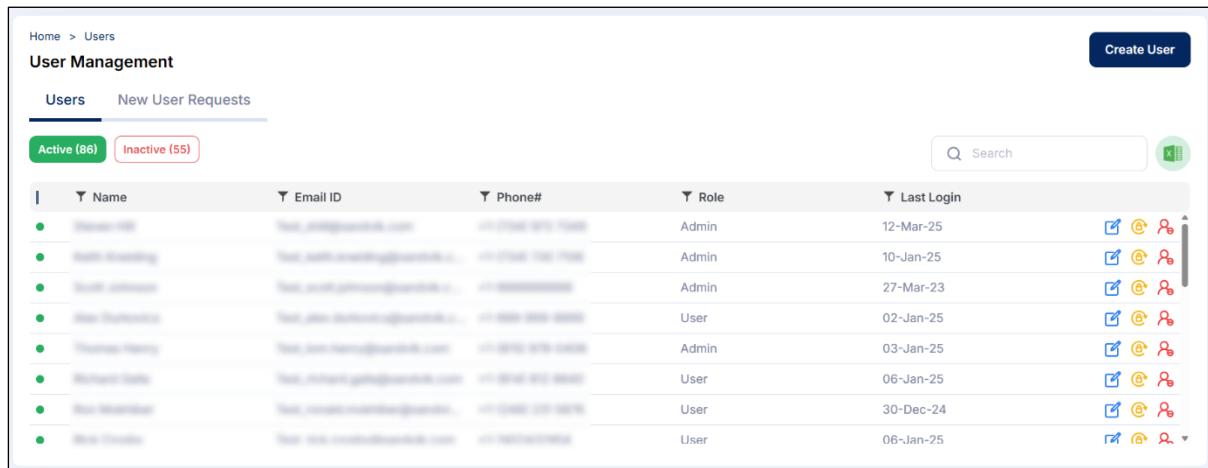
The admin can send a request to the user to reset the password.

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.

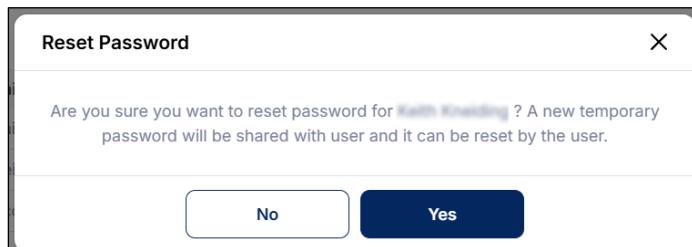
Figure 168: Active Users



	Name	Email ID	Phone#	Role	Last Login	
1.	Health Knoll	Health_knoll@supplierplus.com	123-4567-8900	Admin	12-Mar-25	  
2.	Health Knolling	Health_knolling@supplierplus.com	123-4567-8900	Admin	10-Jan-25	  
3.	Health_knolling	Health_knolling@supplierplus.com	123-4567-8900	Admin	27-Mar-23	  
4.	Health_knolling	Health_knolling@supplierplus.com	123-4567-8900	User	02-Jan-25	  
5.	Health_knolling	Health_knolling@supplierplus.com	123-4567-8900	Admin	03-Jan-25	  
6.	Health_knolling	Health_knolling@supplierplus.com	123-4567-8900	User	06-Jan-25	  
7.	Health_knolling	Health_knolling@supplierplus.com	123-4567-8900	User	30-Dec-24	  
8.	Health_knolling	Health_knolling@supplierplus.com	123-4567-8900	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



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

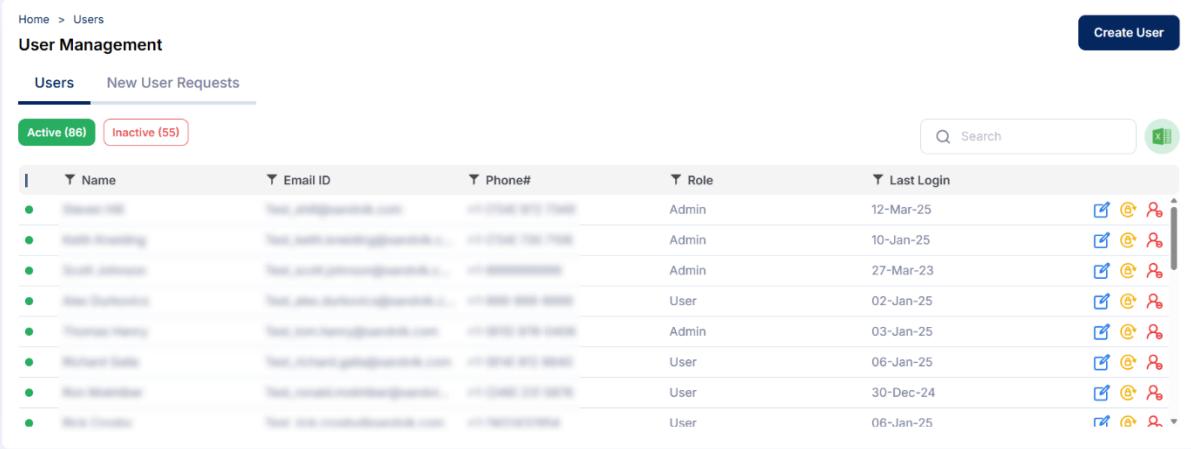
10.1.3 Inactivate a user

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

To deactivate 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.

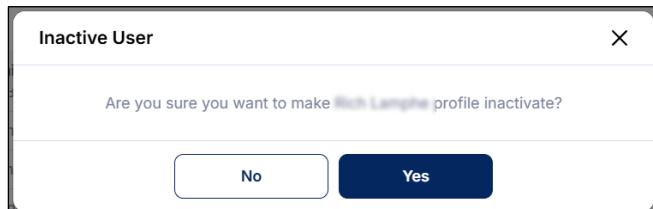
Figure 170: Active Users



Name	Email ID	Phone#	Role	Last Login	Actions
Rich Lampert	Rich.lampert@supplierplus.com	(404) 555-1234	Admin	12-Mar-25	  
Rich Lampert	Rich.lampert@supplierplus.com	(404) 555-1234	Admin	10-Jan-25	  
Rich Lampert	Rich.lampert@supplierplus.com	(404) 555-1234	Admin	27-Mar-23	  
Rich Lampert	Rich.lampert@supplierplus.com	(404) 555-1234	User	02-Jan-25	  
Rich Lampert	Rich.lampert@supplierplus.com	(404) 555-1234	Admin	03-Jan-25	  
Rich Lampert	Rich.lampert@supplierplus.com	(404) 555-1234	User	06-Jan-25	  
Rich Lampert	Rich.lampert@supplierplus.com	(404) 555-1234	User	30-Dec-24	  
Rich Lampert	Rich.lampert@supplierplus.com	(404) 555-1234	User	06-Jan-25	  

- Click the deactivate 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.

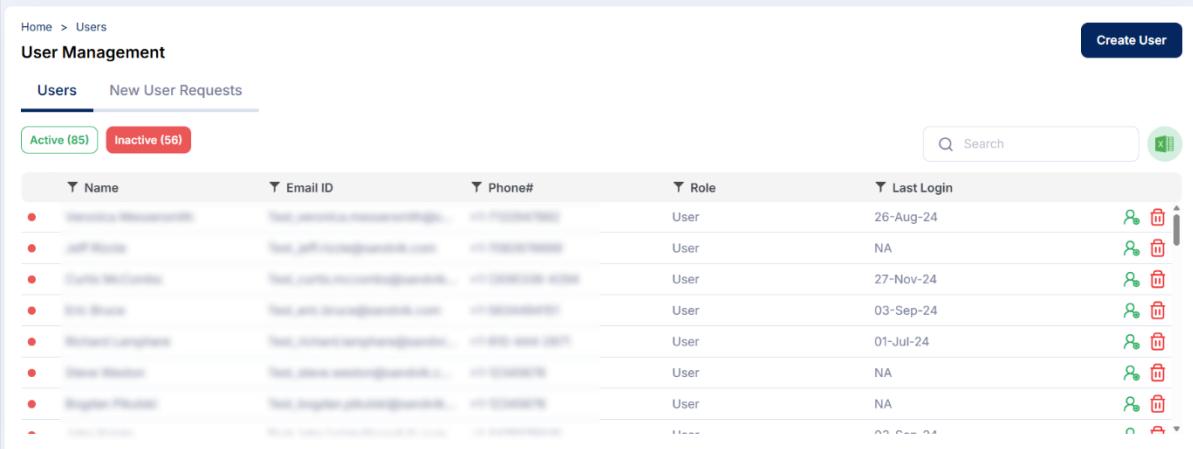
10.2.1 Activate the user

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

To deactivate 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.

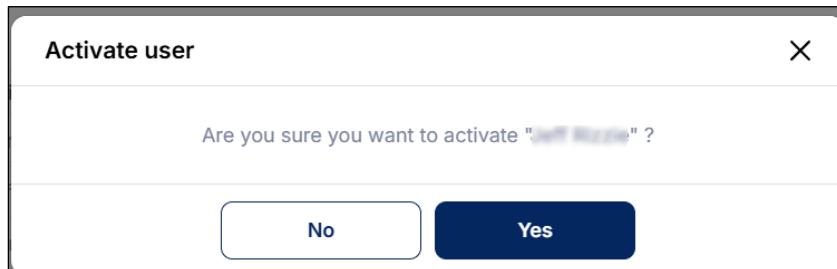
Figure 172: Inactive Users



Name	Email ID	Phone#	Role	Last Login
John Doe	John.Doe@example.com	123-4567890	User	26-Aug-24
Jeff White	Jeff.White@example.com	123-4567891	User	NA
Chris Brown	Chris.Brown@example.com	123-4567892	User	27-Nov-24
Mike Wilson	Mike.Wilson@example.com	123-4567893	User	03-Sep-24
David Johnson	David.Johnson@example.com	123-4567894	User	01-Jul-24
Sarah Miller	Sarah.Miller@example.com	123-4567895	User	NA
Emily Davis	Emily.Davis@example.com	123-4567896	User	NA
Michael Green	Michael.Green@example.com	123-4567897	User	NA
David Wilson	David.Wilson@example.com	123-4567898	User	NA
Sarah Miller	Sarah.Miller@example.com	123-4567899	User	NA

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

Figure 173: Activate user



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

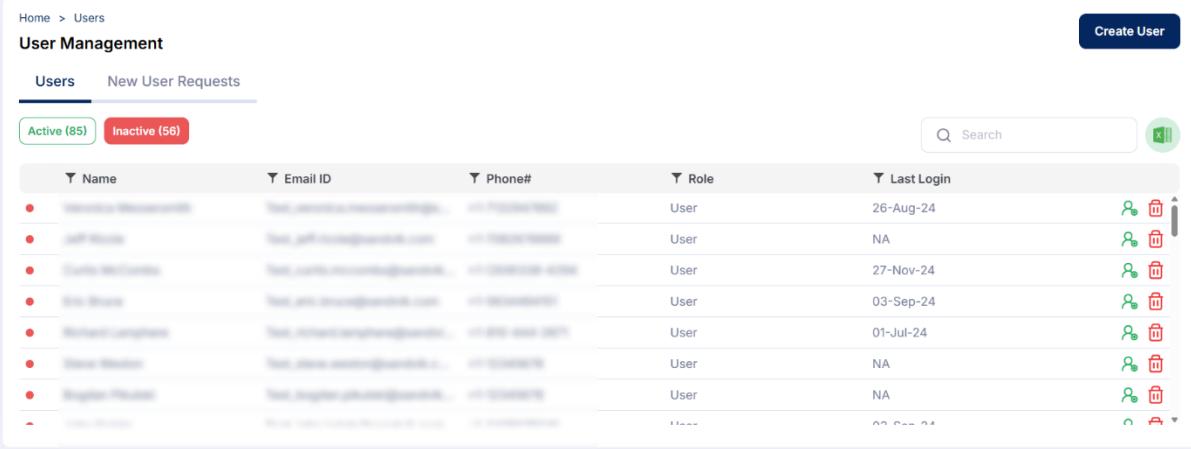
10.2.2 Delete user

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

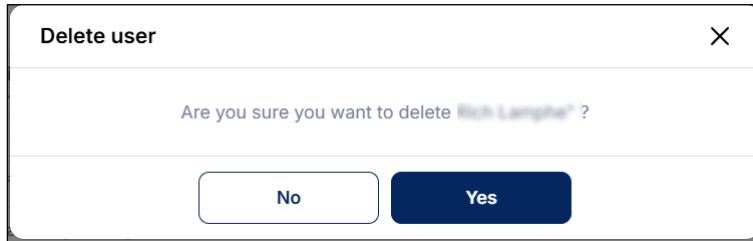
Columns: Name, Email ID, Phone#, Role, Last Login

Rows (Sample):

Name	Email ID	Phone#	Role	Last Login
John Doe	John.Doe@supplierplus.com	123-4567-8901	User	26-Aug-24
Jane Smith	Jane.Smith@supplierplus.com	123-4567-8902	User	NA
Mike Johnson	Mike.Johnson@supplierplus.com	123-4567-8903	User	27-Nov-24
Sarah Williams	Sarah.Williams@supplierplus.com	123-4567-8904	User	03-Sep-24
David Miller	David.Miller@supplierplus.com	123-4567-8905	User	01-Jul-24
Emily Davis	Emily.Davis@supplierplus.com	123-4567-8906	User	NA
Robert Wilson	Robert.Wilson@supplierplus.com	123-4567-8907	User	NA

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

Figure 175: Delete user



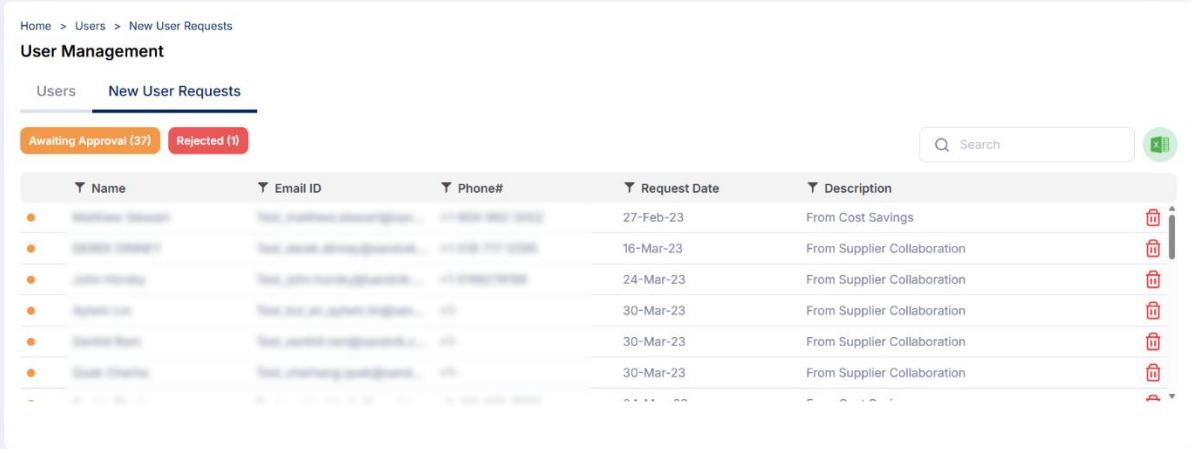
- Click Yes, the user is deleted.

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

Columns: Name, Email ID, Phone#, Request Date, Description

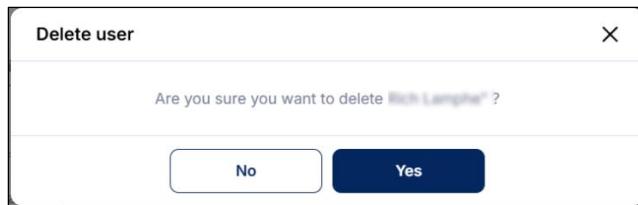
Rows (Sample):

Name	Email ID	Phone#	Request Date	Description
Michael Johnson	Michael.Johnson@supplierplus.com	123-4567-8901	27-Feb-23	From Cost Savings
David Miller	David.Miller@supplierplus.com	123-4567-8902	16-Mar-23	From Supplier Collaboration
Emily Davis	Emily.Davis@supplierplus.com	123-4567-8903	24-Mar-23	From Supplier Collaboration
Robert Wilson	Robert.Wilson@supplierplus.com	123-4567-8904	30-Mar-23	From Supplier Collaboration
Sarah Williams	Sarah.Williams@supplierplus.com	123-4567-8905	30-Mar-23	From Supplier Collaboration
John Doe	John.Doe@supplierplus.com	123-4567-8906	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.

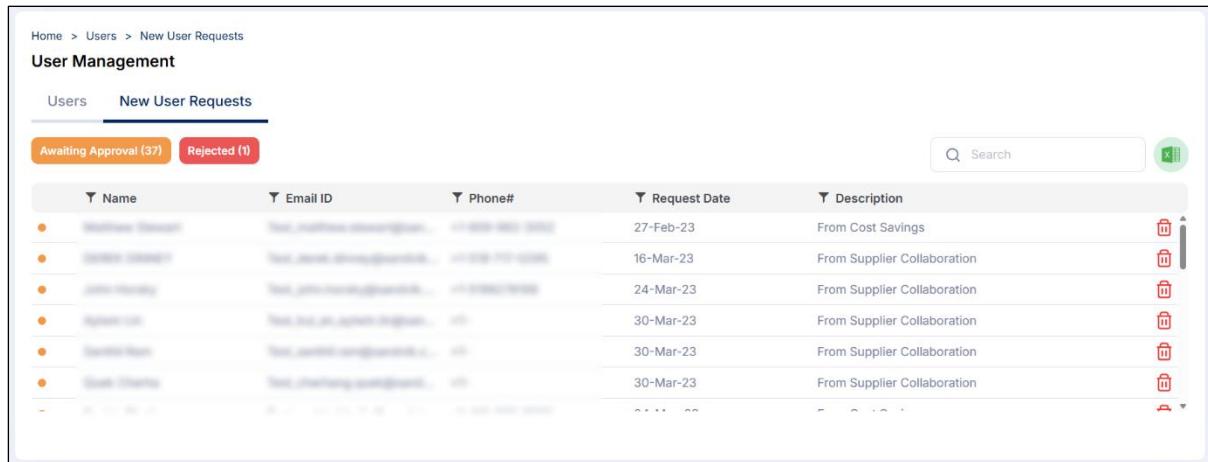
10.3.2 Approve a new user request

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.

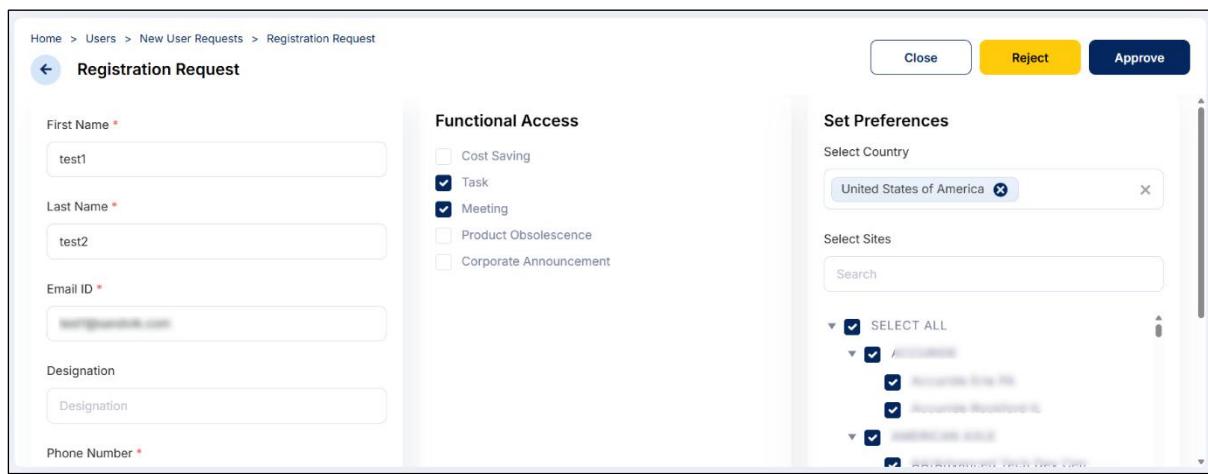
Figure 178: New User requests



User Management						
Users	New User Requests					
		Awaiting Approval (37)	Rejected (1)			
▼ Name	▼ Email ID	▼ Phone#	▼ Request Date	▼ Description	▼	
Rich Lamphier	Rich.lamphier@supplierplus.com	01234567890	27-Feb-23	From Cost Savings		
Rich Lamphier	Rich.lamphier@supplierplus.com	01234567890	16-Mar-23	From Supplier Collaboration		
Rich Lamphier	Rich.lamphier@supplierplus.com	01234567890	24-Mar-23	From Supplier Collaboration		
Rich Lamphier	Rich.lamphier@supplierplus.com	01234567890	30-Mar-23	From Supplier Collaboration		
Rich Lamphier	Rich.lamphier@supplierplus.com	01234567890	30-Mar-23	From Supplier Collaboration		
Rich Lamphier	Rich.lamphier@supplierplus.com	01234567890	30-Mar-23	From Supplier Collaboration		
Rich Lamphier	Rich.lamphier@supplierplus.com	01234567890	30-Mar-23	From Supplier Collaboration		

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)

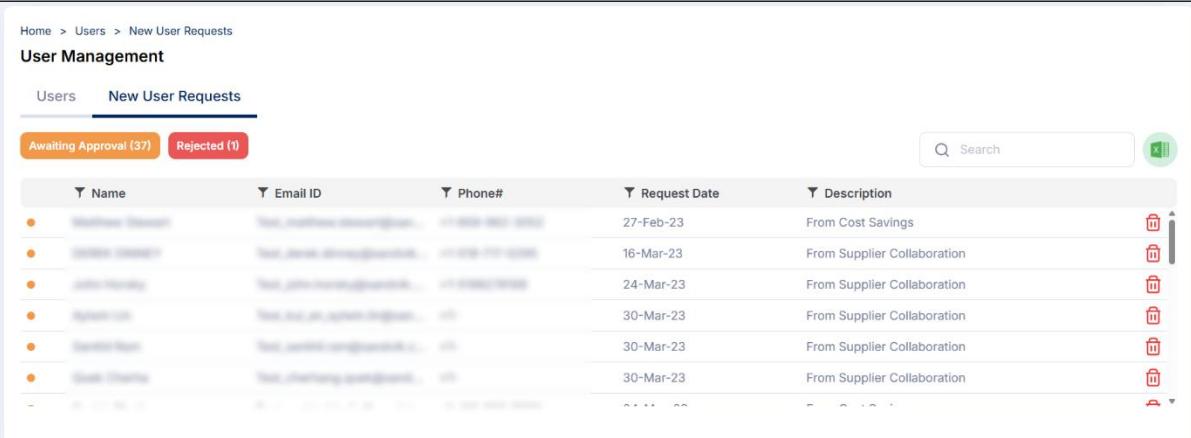
10.3.3 Reject a new user request

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.

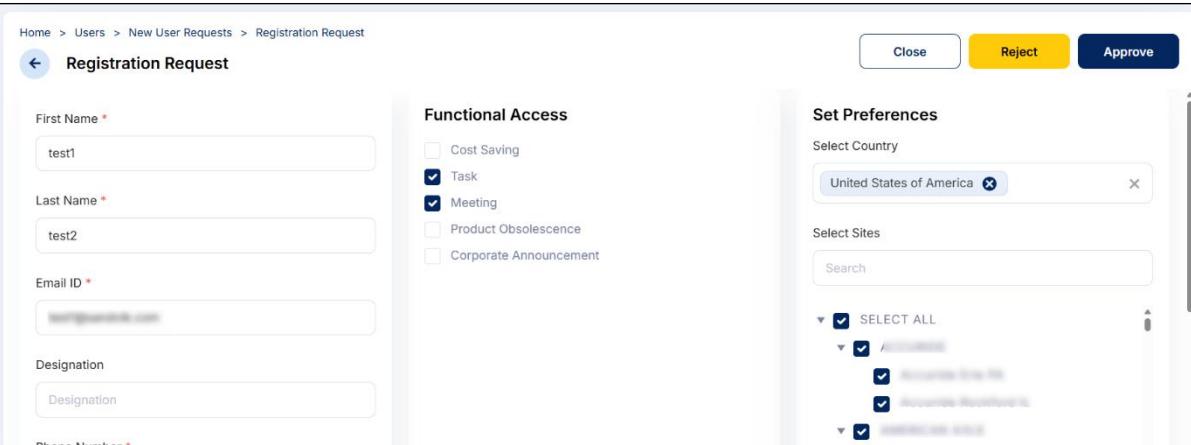
Figure 180: New User requests



User Management				
Users	New User Requests			
Awaiting Approval (37)				Rejected (1)
▼ Name	▼ Email ID	▼ Phone#	▼ Request Date	▼ Description
John Doe	test1@supplierplus.com	123-4567890	27-Feb-23	From Cost Savings
John Doe	test2@supplierplus.com	123-4567890	16-Mar-23	From Supplier Collaboration
John Doe	test3@supplierplus.com	123-4567890	24-Mar-23	From Supplier Collaboration
John Doe	test4@supplierplus.com	123-4567890	30-Mar-23	From Supplier Collaboration
John Doe	test5@supplierplus.com	123-4567890	30-Mar-23	From Supplier Collaboration
John Doe	test6@supplierplus.com	123-4567890	30-Mar-23	From Supplier Collaboration
John Doe	test7@supplierplus.com	123-4567890	30-Mar-23	From Supplier Collaboration

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

Figure 181: Registration details



- 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

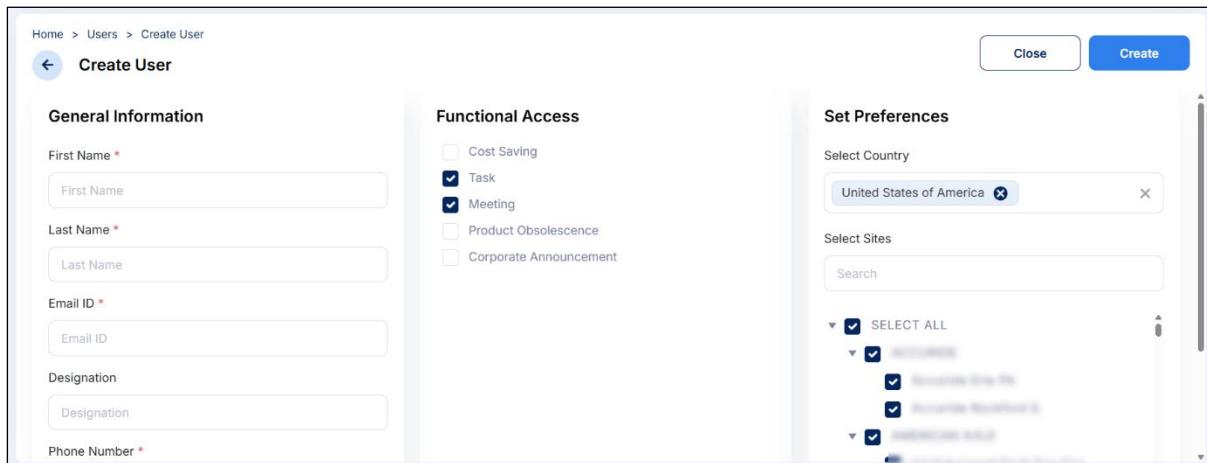
The user management screen allows the administrators to efficiently manage access to the application. It features options for creating new users, where administrators can input essential general information, configure functional access levels, and establish country and site preferences tailored to each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

To create a new user, follow the instructions:

- Sign in to the EGC Supplier Plus application. The Dashboard screen is displayed.
- 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)

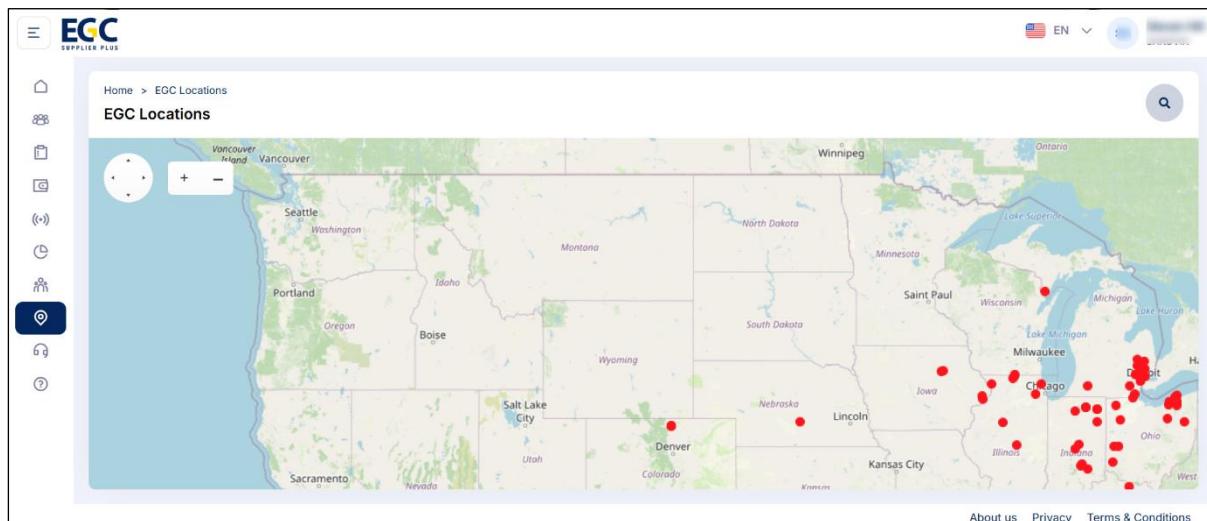
11. EGC Location

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:

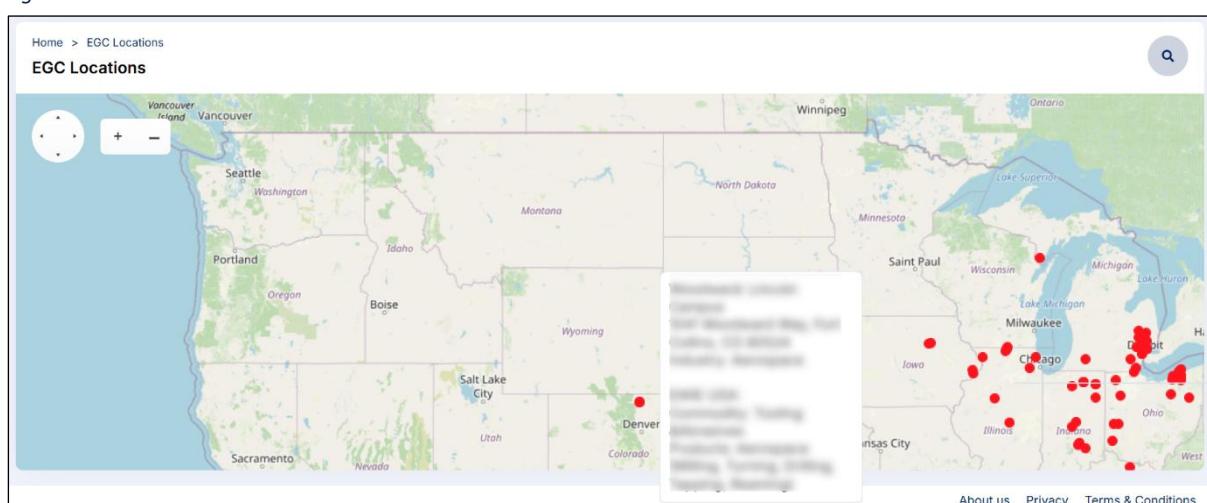
1. Login to the application.
2. In the main menu, click the EGC location icon. The map is displayed on the screen with customers and sites based on the preferences set in the user profile.

Figure 183: EGC Location



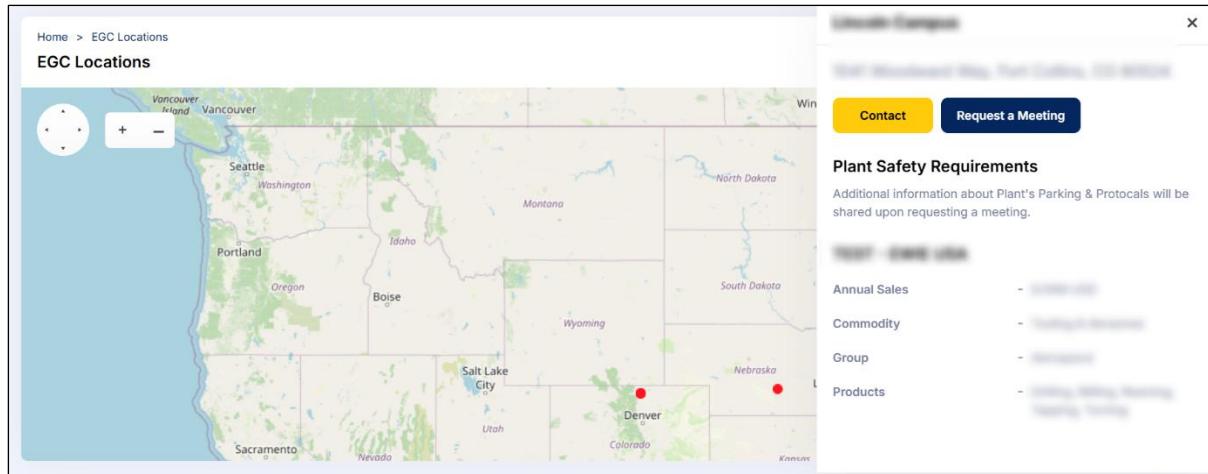
Hover over a red dot to display details of the customer, their commodity and products.

Figure 184: EGC Location - Hover



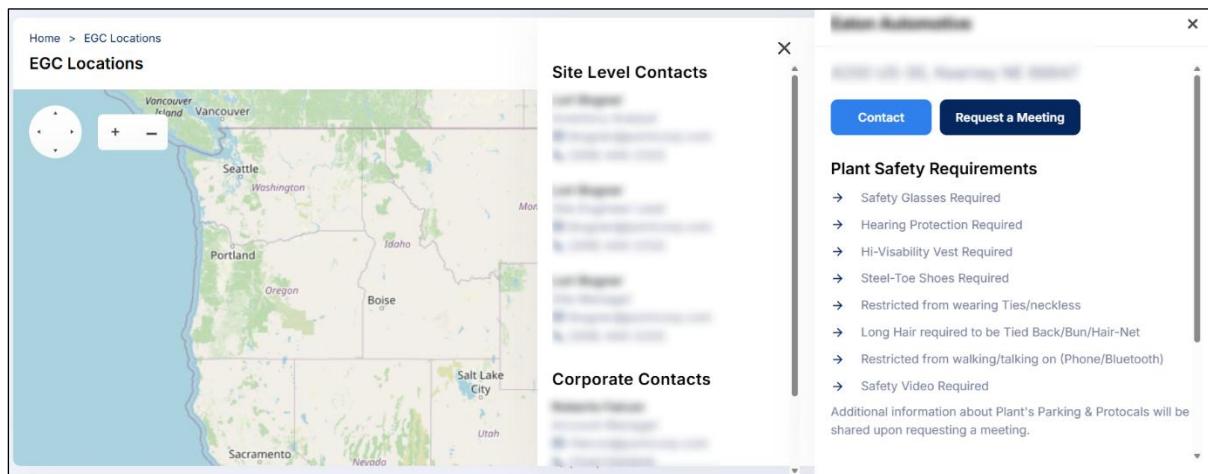
Click on the red dot to open the details on the right. The Plant Location Address, **Plant safety requirements**, **Annual Sales**, **Commodity**, **Group** and **Products** are displayed.

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.