

# **SCORECARD USER MANUAL**

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# Chapter 1: Introduction

Supplier Management provides you with the tools required to enable effective and efficient collaboration with your buyer, right from your on-boarding to evaluating their performance. Supplier Management forms a central repository for all supplier related information letting you update scorecards and add comments.

As a supplier, you can:

- View scorecards
- Self-evaluate
- Export/Import scorecards

## Chapter 2: Scorecard

You can provide your self-evaluation by filling the scorecard. This will help the buyer evaluate you on various dimensions that are important for the buyer organization. The scorecards have weights assigned that would help the buyer evaluate you at different levels.

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

Dear Test Trainer,
You have been invited to respond on a scorecard for self-evaluation purposes.
Here are the details:
Invited by: Straumann
Scorecard Name: Test scorecard test .
Evaluation Period:
This scorecard is to evaluate your performance from 10/11/2022 to 11/11/2022.
You can use the following link to access the scorecard and submit the scorecard responses:

Click on **the link** to proceed with the evaluation.

#### OR

Log into SMART by GEP to view your pending activities under Task card type.

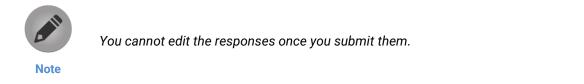
《 습	My Tasks						
Home Home	DRAFT (0) ACTION PENDING (3) FOLLOW UP (0)						
My Tasks + Create	Suppler Profile 1 Form 1						
요 표점 Supplier	Scorecard Name	Document Number	Purpose	Frequency	Created By	Modified On	Status
Profile	Test scorecard test	SCRD-2022.00057	Performance Evaluation		Vlad-Paul Tanase	10/11/2022 09:22:12 AM	Published
	4	Row	s Per Page: 10 🗸 1 - 1 Of 1 < >				► F

## 2.1 Scorecard

1) Click on the scorecard name to open the scorecard

← 📱 TEST SCORECARD TEST (FINALIZED)   NON RECURSIVE :					
Category B - Manufacturing Equipment and	Tools Region Global				
KPI test	* indicates required fields				
	Q1. ISO certified?				
	Ves				
	No No				
	Q2. Question				
	Ves				
	No No				
	c	LOSE SAVE	SUBMIT ALL KPIS		

2) Enter the values in the fields and then click Submit All KPIS. The response is submitted to the buyer.



## 2.2 Additional Actions

Following are the additional functionality available for a scorecard:

- Export/Import
- View Log

#### 2.2.1 Delegate

This feature facilitates you to delegate response submission to another contact person in your organization. On receiving an invitation, you can login into SMART by GEP and choose to change contact person at any point of time.

To delegate:

1) On the upper right corner, click the drop-down and the click **Delegate**.

← 🗳 TEST SCORECA	RD TEST (FINALIZED)   NON RECURSIVE	Export To PDF
Category B - Manufacturing Equipment and T	ools Global	Export To Word Export To Excel
B - Manuracturing Equipment and T	ools excourt	
KPI test	* Indicates required fields	Import Responses
	Q1. ISO certified?	VIEW LOG
	Q1. ISO certinea?	Delegate
	V Yes	
	□ No	
	Q2. Question	
	✓ Yes	
	CLOSE SAVE	SUBMIT ALL KPIS

 The Change Owner pop-up is displayed. Select a desired contact from the Select User dropdown and then click Done. Change Owner will allow the contact person, to select one of the contact persons available in the SMART database.

옾 Delegate		
<ul> <li>You will not be able to respond or get any further notifications will be sent to new owner.</li> </ul>	notification, all f	urther
Select Owner		
Show Lookup		
	CANCEL	DONE

 Upon changing owner of the event, a notification is sent to newly added contact, for participation and the buyer is notified about new contact person.

straumanngroup

The newly added contact person can now submit responses. All notification is sent to new contact person.
 If contact person is changed, the old contact person cannot access the response.

## 2.2.2 Export/Import

On the upper right corner, you can either click **Export to PDF, Export to Word, Export to Excel,** to export the responses or click **Import Responses** to import the responses.

Perform the following steps to Export/Import the responses:

- 1) From the Action menu click the required import/export option.
- Select the responses you want to export/import and click Done.
   For export, the responses are exported in the Downloads folder of your system.

#### 2.2.3 View Log

You can view the log of events performed on the scorecard using this option.

From the Action menu, click **View Log**. The following View Log pop-up. You can view the Status, Request For, Request Time and Complete Time for the scorecard.

围 VIEW LOG (4)					
Status	Request For F	Request Time	Complete Time		
> Complete	Export Scorecard Responses	10/11/2022 11:31:12 AM	10/11/2022 11:31:12 AM		
> Complete	Export Scorecard Responses	10/11/2022 11:30:51 AM	10/11/2022 11:30:55 AM		
> Error	Export Scorecard Responses	10/11/2022 11:30:46 AM	10/11/2022 11:30:54 AM		
> Complete	Export Scorecard Responses	10/11/2022 11:30:40 AM	10/11/2022 11:30:53 AM		
			CANCEL DONE		

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