

Step-by-Step Instructions for Creating and Editing an Improvement Plan

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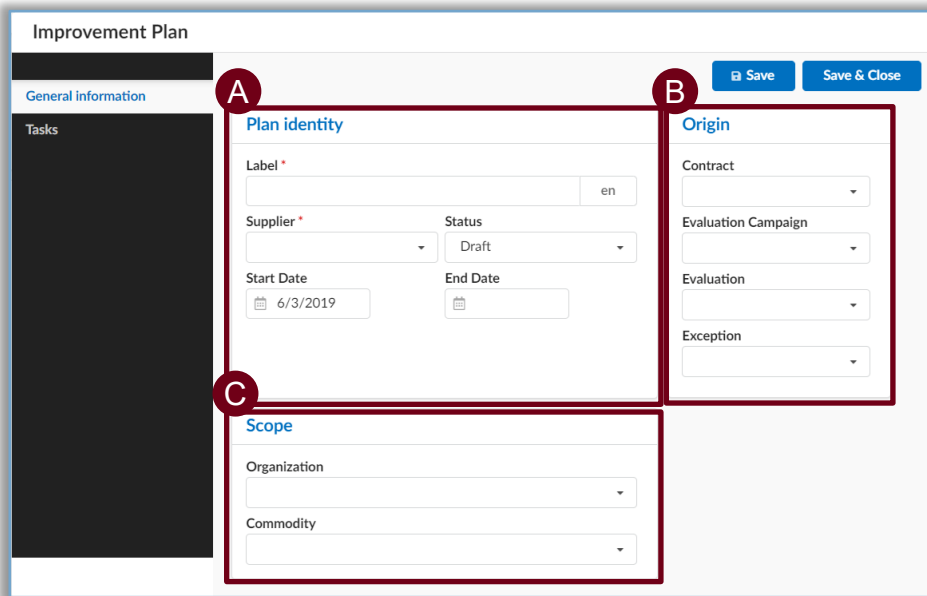
Log in to Ohio Buys. From any page in Ohio Buys, go to the main menu navigation bar, click on **Suppliers**, and select **Improvement Plans**.

2

Click **Create Improvement Plan**.



Fill out the **General Information** tab for the Improvement Plan.



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a) **Plan Identity**

- **Label:** The title of the improvement plan. This field is required.
- **Supplier:** The Supplier to whom the improvement plan is assigned. This field is required.
- **Start Date:** The start date of the plan. Automatically populates with today's date.
- **End Date:** The anticipated date that the plan will be completed
- **Status:** The status of the improvement plan. Can be either Draft, In Progress, or Completed.

b) **Origin:** An improvement plan can be linked to any of the following in Ohio Buys.

- **Contract**
- **Performance Evaluations**
- **Exception**

c) **Scope:** The scope of an improvement plan can be narrowed by:

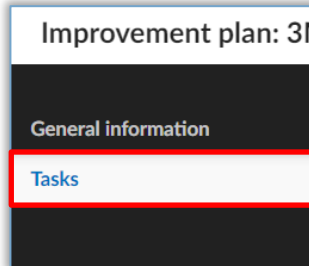
- **Organization**
- **Commodity**

After inputting all of the applicable information in the General Information tab, click **Save**.



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Navigate to the **Tasks** tab.



Click on the **Select Team** field and select Supplier contacts to whom you will be assigning tasks from the drop-down menu. Here you can add any contacts from both the State and the Supplier to whom you will assign tasks as part of the improvement plan.

The screenshot shows the 'Improvement plan: 3M2 Improvement Plan' interface. The left sidebar has 'General information' and 'Tasks' tabs. The main content area has a 'Team' section with a 'Select Team' dropdown menu highlighted by a red box. Below this is a table with columns: Contact, Email, Position, Phone, Profile. One row is visible with 'ANALYST Contract' and email 'agencycontractanalyst@mailinator.com'. To the right of the table is a 'Responsible (Improvement plan)' dropdown. Below the table is a 'Tasks List and Timing' section with buttons: 'Create from a Template Schedule', 'Add a Task', and '0 Result(s)'.

After adding your team, click **Save**.

▲ You must save after adding Supplier contacts to your team in order to assign tasks to them.

Click **Add a Task** to create a new task in the improvement plan.

The screenshot shows the 'Tasks List and Timing' section of the interface. It contains three buttons: 'Create from a Template Schedule', 'Add a Task', and '0 Result(s)'. The 'Add a Task' button is highlighted with a red rectangular box.

▲ You can choose to import all of the tasks from an existing improvement plan by selecting **Create from a Template Schedule**

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Complete the following required fields to create a new task:

The screenshot shows a task creation form with two main sections: 'Information' and 'Task dates'. Callouts A-F highlight the following fields:

- A**: Step (text input)
- B**: Type (dropdown menu)
- C**: Owner (dropdown menu)
- D**: Assigned to (dropdown menu)
- E**: Description (text input)
- F**: Initial Start Date and Initial End Date (calendar pickers)

Other visible fields include: Code, TO, Status, Revisited Start Date, Updated end date, Revisited Duration, Actual Start Date, Actual End Date, Duration, Parent Task, Initial Workload (md), Previous Task, Real updated load (man-days), Progress, and a Comment section with a 'Save' button.

- a) **Step:** Write the name of the task
 - b) **Type:** Select the type of task from the dropdown menu.
 - c) **Owner:** Who is responsible for editing and driving the task to completion. Defaults to the creator of the task.
 - 7 d) **Assigned to:** Who is responsible for completing the action(s) outlined in the task.
 - e) **Description:** A detailed description of the task
 - f) **Initial Start Date / Initial End Date:** The anticipated Start and End dates for the tasks when it is initially created.
- ▲ Tasks can be given hierarchical and chronological relationships to other tasks using the **Parent Task** and **Previous Task** fields respectively
 - ▲ The number of man-days required to complete a task can be estimated in the **Initial Workload** field, and tracked by assignees in the **Real updated load** field
 - ▲ Start and end dates can be updated as the improvement plan progresses
 - ▲ Task Assignees and Owners can add comments and attach files as needed
 - ▲ You can edit an improvement plan by updating existing tasks or adding additional tasks at any time

When you have finished entering all of the necessary information for your task, click **Save and Close**.

Save & Close

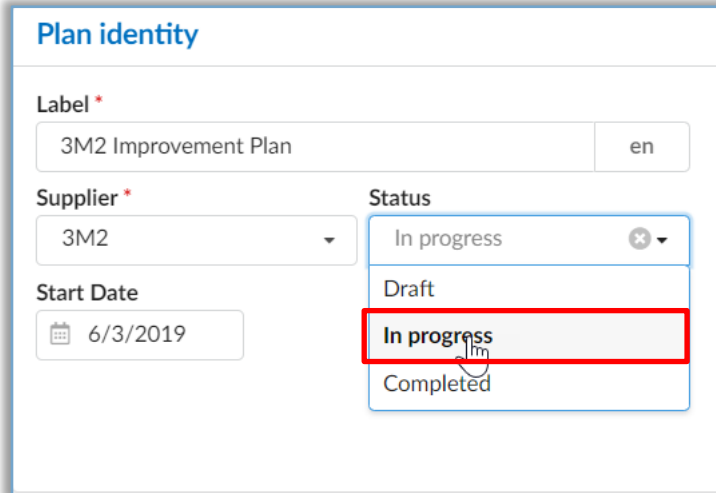
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After you have added all of the necessary tasks to your improvement plan, return to the **General Information** tab.

Update the **Status** of the improvement plan to **In Progress**. Then click **Save**.

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The screenshot shows a form titled "Plan identity" with the following fields:

- Label ***: A text input field containing "3M2 Improvement Plan" and a language dropdown set to "en".
- Supplier ***: A dropdown menu showing "3M2".
- Start Date**: A date picker showing "6/3/2019".
- Status**: A dropdown menu with the following options: "In progress" (highlighted with a red box and a mouse cursor), "Draft", and "Completed".

