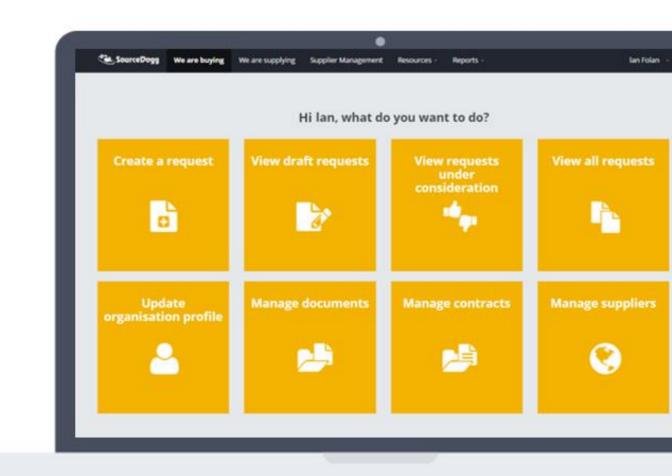


# Supplier Performance Management Admin Guide

Date: June 2022





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# 1. Introduction

The **Supplier Performance Management** (SPM) module allows you to design and implement processes to measure, analyse and manage the performance of your suppliers using scorecards and KPI tracking. This will lead to the continuous improvement between the buyer and supplier organisations.



This module should be used in conjunction with the other features available under the umbrella of "Supplier Performance Improvement":

### (1) Supplier Relationship Management:

- Arrange Review Meetings with suppliers and log associated discussion points and details.
- Key Actions to maintain an action log relating to each supplier.

### (2) Action Plans:

- Create Improvement Plans to agree, document, and track a roadmap for improvement with suppliers on areas/KPIs where they are underperforming.
- Create Non-Conformance and Corrective action reports to flag breaches of SLAs or other specific issues with suppliers.
- Provide details of the issue and gather supplier responses on corrective actions, solutions, and evidence of completion.

This guide covers the creation of the **SPM Templates**, including the KPIs, Review Criteria and Categories that the Templates are made up of, and the various SPM User Permissions.

There is a subsequent guide that will look at the **SPM Records** – how to create and complete a scorecard.

# 2. SPM User Permissions

Each SourceDogg user will be required to have appropriate level of permissions applied to their profile before they will be able to access the SPM module.

Account administrators can control the permission levels for existing and new users through each user's settings in the 'Users' tab of your Settings area. As a default each user is set to '**No SRM-SPM'**. These can be found when you click on your name in the top right corner (1) followed by 'Settings' (2)



### and then the 'Users' tab (3).

Settings					2 Profile Settings Help
Personal Settings					Log Out
Change Password	Use	r Management			
Organisation Settings	Create	new users or edit existing users			Create Batch of Users
Organisation Profile	ACTIVE	NAME			
Branding	USERS (13)	JOB TITLE EMAIL	LAST LOGIN	USER GROUPS	
Certifications				Editors Contract Editors Reg	uisition Approvers
Datasheets	AW	Anthony Wilson Procurement Manager	12 Jul 2021 09:28	Cannot Approve Suppliers Invit Cannot Pool Suppliers Full Sear	
Shared/Linked Content	-	anthonywilson@demosupport.sourcedogg.com	No SRM-SPM Action Plan App		vers
Security				Contract - Dairy Supplier SRM s	
Category Settings	-	Bill Mathews		Readers No Contracts Regul Cannot Approve Suppliers Invit	
Users	вм	Quality Manager billmatthews@demosupport.sourcedogg.com	13 Aug 2020 15:28	Cannot Pool Suppliers Full Sear No SRM-SPM Action Plan Appro FSH IIA Group Quality Team	vers Procurement
User Groups				No Requests No Contracts	equisitioners
Custom Tiles	a	Charles Lawson	18 Feb 2019 10:26	Cannot Approve Suppliers Invit Full Search Tag Suppliers SR	
Guides		charleslawson@demosupport.sourcedogg.com	10100201010120	Action Plan Approvers Procurer	
User Views				SRM suppliers 1	
Request Settings		Harry Jones	03 Jun 2020 11:00	Editors Contract Admins Re Approve Suppliers Invite Any Full Search Tag Suppliers SR	Pool Suppliers
Onboarding Settings	H	Procurement Analyst harryjones@demosupport.sourcedogg.com	03 Jun 2020 11:00	Action Plan Approvers Procurer	
Requisition Settings				Quality Team	
Saved Search Settings		John Smith		Admins Contract Admins Re Approve Suppliers Invite Any	

Below is the list of all the current options with the brief description for each SPM role.

Please note that these are shared with the SRM module, you can see what is covered for the corresponding permission levels in the SRM User Guide <u>here</u>.

SRM/SPM Permissions Group	O SRM-SPM Admins	SRM-SPM Editors	O SRM-SPM Readers	No SRM-SPM
• SPM Admins				

- Create and edit the SPM KPI Fields
- Create and edit SPM Review Criteria
- Create and edit SPM Templates
- Create and score SPM Records
- Can view any SPM
- Record



### • SPM Editors

- Create and score SPM Records
- Can view any SPM record

#### • SPM readers

- Can view any SPM Records but may not create or score any.
- No SPM
  - The module is not visible at all to any users with 'No SPM' selected.

# 3. SPM Settings

As an SPM Admin you must first create your **SPM Templates**. This is your scorecard your users will complete to assess your suppliers' performance. It is made up of a set of KPIs, and within those KPIs - Review criteria, specific to a type of supplier, business unit, project etc.

The **KPI** is an overarching topic that you would like to rate suppliers on e.g. Quality, Health and Safety etc.

The **Review Criteria** are individual questions, deliverables etc that you would like to review performance on. These are linked under an overarching KPI. For example, the Health and Safety KPI may have Review Criteria covering standard of staff training, number of accidents per month etc.



### SPM Custom Fields

SPM Custom Fields can be found in your Settings area and is where you create and manage the tools you use to evaluate your suppliers – the **KPI Fields** and **Review Criteria**. Before you can build your **SPM Templates**, these must first be created.

Settings			Settings
Personal Settings			
Change Password	SPM KPI Fields		Log Out
Organisation Settings	(Create new SPM KPI fields or ed	lit existing ones).	/
Organisation Profile	NAME	DESCRIPTION	
Branding	People	People	0
Certifications	Time	Time	
Datasheets			0
Shared/Linked Content	Adding Value	Adding Value	0
Security	Quality	Quality	0
Category Settings	SHE	SHE	
Users	2012	SHE	0
User Groups	Systems/People	Systems/People	0
Custom Tiles	Commercial	Commercial	0
Guides	Safety	Jafety	0
User Views	Tender / Construction	Tender / Construction	
Request Settings	Tender / Construction	Tender Construction	0
Onboarding Settings	Culture	Culture	0
Requisition Settings	/		
Saved Search Settings	SPM Review Criteri		Add Review Criteria
Report Schedules	(Create new SM Review Criteria		
Request Custom Fields			
Profile Custom Fields	NAME	DESCRIPTION	
Contract Custom Fields	Electiveness of Supplier's Orderin	ng System	0
SRM Custom Fields	Product Technical Support		0
Action Plan Custom	Provides Value Engineering & Inn	ovation	0
SPM Custom Fields			0
aria edistolli rields	Adherence to Delivery Dates and	Times	0



### SPM KPI Fields

To add a new KPI Field click on the green 'Add KPI Field' button.

(Create new SPM KPI fields o	r edit existing ones).	
NAME	DESCRIPTION	
People	People	0
Time	Time	0
Adding Value	Adding Value	0
Quality	Quality	0
SHE	SHE	0

### Add KPI Field

The only fields that are mandatory to complete when creating the KPI Field is the Name and Description. Tags may be used to group certain KPIs together for reporting purposes.

dit the KPI field below. Any char ill not be affected.	nges are applied instantly. When modifying existing KPI fields note that existing values in these fields
Name *	Health & Safety
Description *	Health & Safety metrics
Unit (optional)	
Set Target (optional)	
Set Tags	
Add tags to the KPI field to include the Performance themes or Performance Policies etc which will be used for reporting purposes.	HBS ()



To edit or deactivate/delete a KPI, click on the cog opposite the desired KPI and select the relevant option.

SPM KPI Fields		
(Create new SPM KPI fields o	r edit existing ones).	
NAME	DESCRIPTION	
People	People	× (*
Time	Time	Edit Deactivate
Adding Value	Adding Value	0

If a KPI Field has been used previously it cannot be deleted, only deactivated. Deactivating it will mean it is not available for use in future Templates.

If a KPI Field has not been used previously it can be deleted, this will mean it will not be in your list of KPI Fields anymore.

SPM KPI Fields (Create new SPM KPI field	s or edit existing ones).	Add KPI Field
NAME	DESCRIPTION	
	People	•
Time	Time	Edit Keactivate
Adding Value	Adding Value	

A deactivated KPI Field can be reactivated through the same cog.

### SPM Review Criteria

Within each KPI you then set the Review Criteria, these are the individual metrics that you assess the suppliers against.

To create a new Review Criteria, click on the green 'Add Review Criteria' button.



SPM Review Cr	riteria	Add Review Criteria
(Create new SPM Review		
NAME	DESCRIPTION	
Effectiveness of Supplier's	Ordering System	Q
Product Technical Support	t	Q
Provides Value Engineerin	g & Innovation	0
Adherence to Delivery Dat	tes and Times	٥
Response time to Technic queries	al or Logistical	0
Overall Service Performan	ice	٥
Handling of Documentatio	on Queries	٥
Adequacy of supervision	Adequacy of supervision	à



### Add Review Criteria

dit the SPM Review Criteria l	below.	
Name *	Documentatio	n
Description 1	Adequacy of d	ocumentation (ITPs, check sheets, certificates, O&Ms etc)
Scoring Scale *	Start Value	* 0
	End Value *	5
Scoring Guidelines	SCORE VALUE	DESCRIPTION
	0	Poor or non-existent
3	1	Errors & omissions noted
	2	Documentation needs resubmitting
	3	All records/documents timely and to specification
	4	Timely and to spec, drives improvement

- 1. Enter the **Name** (mandatory) and **Description** (optional) of the Review Criteria. The Description will be visible on the scorecard and can help the user that is completing the scorecard to understand exactly what is covered by this Criteria.
- 2. The **Scoring Scale** is the dropdown list the user will be picking from when they are rating the supplier against that KPI. The numbers you enter here will then create the table of Scoring Guidelines.
- 3. **Scoring Guidelines** is where you enter the Description against each of the Score Values entered in the Scoring Scale. This will provide guidance to the user and help them to decide what score to allocate to the supplier against each metric.



L	5	Skilled craftsmen fully trained
Link to KPI	Select KPI	· · · · · · · · · · · · · · · · · · ·
Text for the comment box 1 5	☐ Make the comm	ent box mandatory
Text for the comment box 2	☐ Make the comm	ent box mandatory 6 Save Cancel

- 4. Click on the **Link to KPI** dropdown to choose which KPI this Review Criteria is to be associated with.
- 5. There are 2 **Comments** boxes available to the scorer of the Record to perhaps give a justification for the score they have given this metric, record some feedback the supplier has given them, or perhaps some suggestion for possible future improvements. Enter your chosen text in the box provided, this will be displayed in the comment box to the user scoring the supplier as a guide. To make the comment box mandatory for the user to populate tick the smaller box below.
- 6. To finalise, click **Save**.

SPM Review C		
(Create new SPM Revie		
NAME	DESCRIPTION	
Effectiveness of Supplier	's Ordering System	
Product Technical Suppo	ort	View Clone
Provides Value Engineer	ing & Innovation	Deactivate
Adherence to Delivery D	ates and Times	\$
Response time to Techn queries	ical or Logistical	\$

To view, clone or deactivate a Review Criteria, click on the cog opposite the desired Review Criteria and select the relevant option. Deactivating will mean it is not available for future templates.



When creating multiple Review Criteria cloning can save you time as it can save you typing in the same text in the Description and Comment Box fields.

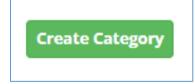
### **Category Settings**

Category Settings can be found, by Account Admins, in your Organisation Settings. It can be used to create projects or divisions within a company that can be stored in the system as a dropdown to be used in the SPM module. This is useful if a supplier is to be assessed multiple times by your organisation across projects and divisions, their performances in those areas can be easily compared.

Settings			Profile Settings Help
Personal Settings			Log Out
Change Password	Categories		Create Category
Organisation Settings	Create new or modify the existing Category Type fields and its options. define the organisation entities.	These fields are used to	
Organisation Profile	Name ‡	Color    Status:	Actions
Branding		Color + Status	<ul> <li>Actions</li> </ul>
Certifications	Project	ACTIVE	Edit
Datasheets			
Shared/Linked Content	Area	ACTIVE	Edit
Security			
Category Settings			
Users			
User Groups			

### **Create Category**

To create a new category, click on the green 'Create Category' button.





Settings				
Personal Settings				
hange Password	Edit Category: Proje	ect		
Organisation Settings	Enter the details below. Changes	take affect immediately.		
rganisation Profile	Details			
randing				
ertifications	1 Category Name *	Project		
atasheets		Give this Category a useful name to help identify it's purpose.		
hared/Linked Content	Description			
ecurity	2			
ategory Settings		A detailed note helps other users understand this category in more detai	а.	
sers	3 Category Color *	#5bc0de		
ser Groups	Category Values *	VALUE	COLOR	
istom Tiles		Project 1	#5bc0de	×
uides	4			
ser Views		Project 2	#5bc0de	×
equest Settings		Project 3	#5bc0de	×
nboarding Settings			Add Op	ption
	6	Save	5	Cance
equisition Settings				

- 1. Enter the **Category Name**, this is a mandatory field.
- 2. You can provide an optional **Description** to let users know more about it.
- 3. Choose the **Category Colour** by clicking in the box and selecting the preferred colour.
- 4. Enter the options into the **Category Values** boxes. Each option can also have an individual colour if preferred.
- 5. Click on Add Option to enable more Category Value boxes.
- 6. Click **Save** to finalise the Category.

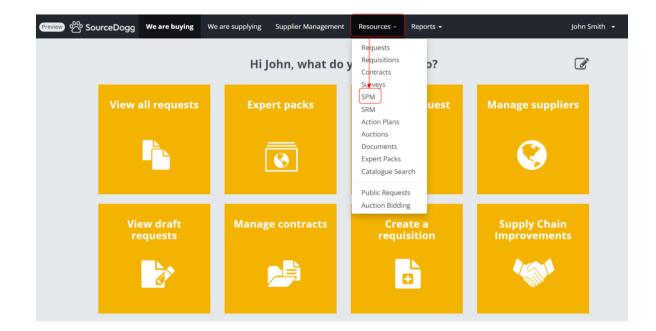


	sting Category Type fields and its op	tions. These fields are used to		
define the organisation entitie	es.			
Name \$		Color 🗢	Status 🗘	Actions
Project		_	ACTIVE	Edit
Area		_	ACTIVE	Edit Deactivate
				Delete

To Edit or Deactivate a Category click on the dropdown opposite the desired Category and select the relevant option. Deactivating the Category will mean it is unavailable to users.

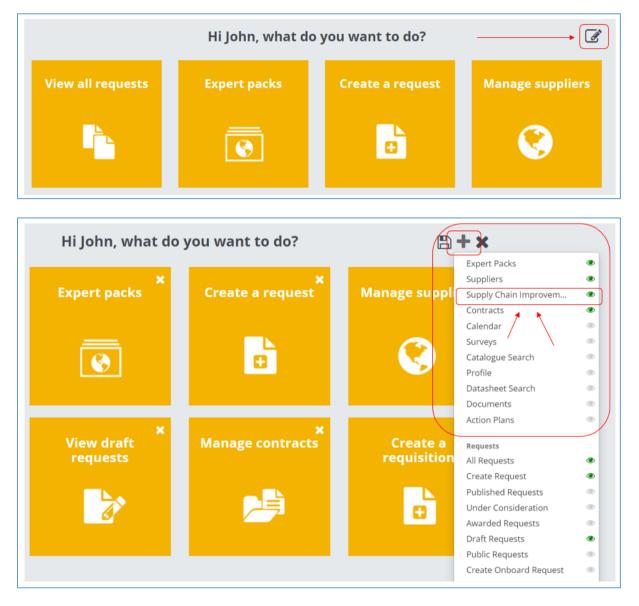
## 4. Where to find SPM

There are 2 ways of accessing the SPM module. From any page on SourceDogg you can find it by clicking on the 'Resources' dropdown and selecting 'SPM'.





If your permission levels allow it, you can also add the 'Supply Chain Improvements' tile to your homepage by clicking on the pencil icon, followed by the + button and choosing it from the list.



The Supply Chain Improvements tile is where you can access 3 different SourceDogg modules – SRM (Supplier Relationship Management), SPM (Supplier Performance Management) and Action Plans.

Click on 'Go to SPM' to open this module.



Supply Chain	Supplier Relationship Management	Supplier Performance Management	Action Plans
mprovements	The Supplier Relationship Management (SRM) module allows you to strategically plan for and manage all interactions with the suppliers.	The Supplier Performance Management (SPM) module allows you to design and implement processes to measure, analyse and manage the performance of your suppliers. ✓ Scorecards ✓ KPI tracking	The Action Plan module allows you to initiate and follow up the improvement plans and non- conformance processes with th suppliers. ✓ Improvement Plans ✓ Non-Conformance Reports
	Go to SRM	Go to SPM	Go to Action Plans

# 5. SPM Module

There are two areas in the SPM module – Templates and SPM Records.

Templates (Admin Only)	SPM Records

**Templates** - This can only be accessed by SPM Admins and is where the SPM templates are created.

**SPM Records** – This can be accessed by SPM Admins, Editors or Readers. This is where individual SPM Records are generated from templates and completed.



### Templates

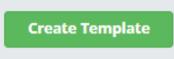
You can have multiple Templates to cover different types of suppliers as you may want different KPIs and Review Criteria for better comparison.

Preview	光 SourceDogg	We are buying We are supplying	ng Supplier Management	Resources -	Reports 👻		John Smith	-
2	Templates (Admin SPM Templat All SPM Templates	1 tes	0			4	reate Template	
	Template Type	Title \$		Category Type 🗘	Created \$	Status ‡		
	Standard	Materials and Plant		Area	22 Apr 2022 14:57	PUBLISHED	View -	5
	Standard	Subcontractor		Area	22 Apr 2022 14:50	PUBLISHEE Clon Dead		

- 1. SPM Admins will be able to open either **Templates** or **SPM Records**. SPM Editors or Readers will only be able to access **SPM Records**.
- 2. Using the **dropdown filter** you can narrow your view down to the status of the Templates Draft, Published and Deactivated.
- 3. Using the search box, you can search by the Title or Category of the Template
- 4. To create a new SPM Template, click on the green **'Create Template'** button.
- 5. To **View, Clone** or **Deactivate** a Template click on the dropdown next to the appropriate Template and select. Cloning the Template will create an exact copy to start off with which you can then make changes to and publish. Deactivating the Template will mean it is no longer available for users.



### **Create Template**



### Template Details

Templates (Admin Only)       SPM Records         Edit SPM Template: Subcontractor On-Site Evaluation         Edit SPM Template details below.	
Template Details Content	Back to SPM Templates
SPM Template Type *	Summary
Standard *	DRAFT
1 Title *  Subcontractor On-Site Evaluation	Publish Template
Description	Save Details
2	Delete
3 Select the category Select Category Type  Projects	

- 1. The Title field is the name of this Template and is a mandatory field to complete
- 2. You may have several similar sounding Templates so you can use the Description box (optional) to explain the difference between them.
- 3. Select the Category this Template is to be associated with by clicking in the dropdown. Multiple Categories can be selected if necessary.



	Quarterly	¢
-	Set the KPI / Review Criteria Weightings *	
e	Choose the weighting formats for your Review Criteria and KPI's in order to calculate a total score for the suppliers. You may wish to equally weight each Review Criteria within one KPI. Or keep the KPIs equally weighted but attribute higher importance to one Review Criteria within them such as Cost.	
	KPI weighting mode:	
	<ul> <li>All KPI's will be given Equal weightings automatically</li> </ul>	
	<ul> <li>Assign Percentage weightings (all KPI weights must sum up to 100%)</li> </ul>	
	$\odot$ Assign Points weightings (points can be any whole number, they will be scaled up to 100% automatically)	
	Review Criteria weighting mode:	
	<ul> <li>All KPI's Review Criteria will be given weightings automatically</li> </ul>	
	O Assign Percentage weightings to Review Criteria (all KPI's Review Criteria weights must sum up to 100%)	
	$\bigcirc$ Assign Points weightings to Review Criteria (points can be any whole number, they will be scaled up to 100% automatically)	
. ,	Add a schedule to this template (Optional)	
	(Add a recurring schedule to your template to auto-schedule for the different review periods. OR Add a single batch schedule to your template to create a one-time template schedule).	
	Add Recurring Auto-Schedule	t
1	Add Single Batch Schedule	t

- 4. You can set the time period this Template covers by clicking on the Set Reporting Review Period Format dropdown and selecting Monthly, Quarterly, Bi-Annually or Yearly. When the user is completing the Record they can then choose the specific period it refers to eg Q3 2022.
- 5. The default setting is that all the KPIs are weighted equally (eg 5 KPIs are worth 20% each to the overall score) but you can also Set the KPI Weightings to be different contributions to the score by percentage (eg KPI 1 is 60%, KPI 2 is 20% and KPI 3 is 20%) or score (KPI 1 is 60 points, KPI 2 is 50 points and KPI 3 is 40 points). The system will then calculate, based on those weightings, the final score.
- 6. The default setting is that all Review Criteria are weighted equally (eg 5 Review Criteria are worth 20% each to the overall score) but you can also Set the Review Criteria Weightings to be different contributions to the score by percentage (eg Review Criteria 1 is 60%, Review Criteria 2 is 20% and Review Criteria 3 is 20%) or score (Review Criteria 1 is 60 points, Review Criteria 2 is 50 points and Review Criteria 3 is 40 points). The system will then calculate, based on those weightings, the final score.
- 7. To set up a recurring schedule or a single batch schedule for this Template click on **Add a schedule to this template**. Please note this can only be done when the Template has been published.



### Add a schedule to this Template

Add a schedule to this template (Optional) () (Add a recurring schedule to your template to auto-schedule for the different review periods. OR Add a single template to create a one-time template schedule).	e batch schedule to your
Add Recurring Auto-Schedule	Import
Add Single Batch Schedule	Import

Import

Г



For both the Recurring Auto-Schedule and the Single Batch Schedule you have the option of downloading a template to populate with the relevant Category, time period covered, list of users and suppliers.

1. Download the SPM Template.

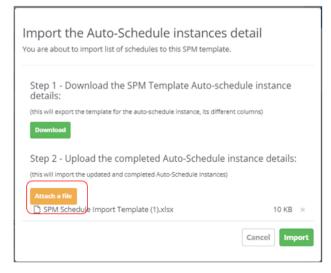
Import the Auto-Schedule instances detail You are about to import list of schedules to this SPM template.
Step 1 - Download the SPM Template Auto-schedule instance details: (this will export the template for the auto-schedule instance, its different columns)
Step 2 - Upload the completed Auto-Schedule instance details: (this will import the updated and completed Auto-Schedule instances) Attach a file No attachment provided
Cancel



- 2. Populate the template with the information required.
  - **Title of the Instance** The name you give to the schedule.
  - **Category** The Category/Categories it relates to. If using multiple categories use ; in between to separate them.
  - **Review Period** The time period (Month, Quarter etc) this Review is to cover and in what year.
  - **Team** The emails of the user(s) that are to complete the scorecard. If using multiple categories use ; in between to separate them.
  - **List of suppliers** The supplier(s) it is related to. If using multiple categories use ; in between to separate them.

Category: Please use the following format: Category: Value Use ';' to separate mutliple categories	Review Period: accor template	ding to Review Period format specified in the	Team Use ';' to separate mutliple items	List of su Use ';' to
Category	Period	Year	Username	Supplier
			johnsmith@demosupport.sourcedogg.com	
			;	EFV;
			harryjones@demosupport.sourcedogg.co	Internatio
Area: Central; Area: Logistics	January	2022	m	SCM Inte
				EFV;
			charleslawson@demosupport.sourcedogg.	Internatio
Area: Central; Area: Logistics	February	2022	com	SCM Inte
			harryjones@demosupport.sourcedogg.co	
Area: Central; Area: Logistics	March	2022	m	EFV
Area: Central; Area: Logistics	April	2022	johnsmith@demosupport.sourcedogg.com	RMH Indu
	Category: Value Use ',' to separate mutliple categories Category Area: Central; Area: Logistics Area: Central; Area: Logistics Area: Central; Area: Logistics	Category:     Value     template       Jse ',' to separate multiple categories     Period   Area: Central; Area: Logistics  Area: Central; Area: Logistic  Area: Central	Category:     Value     template       Jse ',' to separate multiple categories     Period     Year       Category     Period     Year       Area:     Central; Area: Logistics     January     2022       Area:     Central; Area: Logistics     February     2022       Area:     Central; Area: Logistics     March     2022	Category: Value     template     Use ',' to separate mutiple items       Jse ',' to separate mutiple categories     Vear     Username       Scategory     Period     Year     Johnsmith@demosupport.sourcedogg.com       Area: Central; Area: Logistics     January     2022     m       Area: Central; Area: Logistics     February     2022     charleslawson@demosupport.sourcedogg.com       Area: Central; Area: Logistics     February     2022     m

### 3. Attach the populated template.



Your schedule is now created. The Template will be published at the stated intervals and any users listed in the spreadsheet will then be notified prompting them to login and complete the scorecard.

Click on the arrow icon to expand and view the details. Click on the pencil icon to edit or delete.



	rring schedule to your template to auto-schedule for the different review p create a one-time template schedule).	periods. OR Add a single batch schedule to your
Add Rec	urring Auto-Schedule	Import
•	January Supplier Performance Review	
•	February Supplier Performance Review	Edit Cancel
•	March Supplier Performance Review	1
	April Supplier Performance Review	1

<ul> <li>Janua</li> </ul>	ry Supplier Performance Review 🥒
Title *	January Supplier Performance Review
Category list optior	*
	Central Logistics
Notification Team <sup>4</sup> Description	
NAME	
JS John Smith Managing	
HJ Harry Jone Procureme	
Select the start of t	he Review Period *
January	* 2022 *
Select the Suppliers	*
International Courie	r Service EFV SCM International Ltd



#### Add Recurring Auto-Schedule

If you want to manually plan your Supplier Performance Reviews out in advance on a timetable, click on 'Add Recurring Auto-Schedule'.

- Add a schodu	le to this temp	olate (Optional) 😌	
(Add a recurring		emplate to auto-schedule for the different review periods. OR Add a single batch schedule to your	
	ng Auto-Schedu		
Add Recurr	ng Auto-Schedu	Impor	•
Title *	1	Q2 Supplier Performance Review	
Select the ca	tegory option *	*	
Select the ca	legory option		
		2 Category: Area Select Category	Ŧ
		Central x	
Notification	leam *		
Description			
NAME			
	1 Smith		
Joh	n Smith naging Director	>	ĸ
Js Joh Mar	aging Director		×
Js Joh Click to add		ember or group	ĸ
Js Joh Click to add	aging Director another team mer	ember or group	×
Click to add	aging Director another team mer	ember or group embers.	×
Click to add Please select No Select the sta (From the abs	another team mer cification Team men art of the Review we selected	ember or group embers.	×
Click to add Please select No Select the sta	another team mer cification Team men art of the Review we selected	ember or group embers. ew Period *	×

- 1. Enter the **Title** of the scorecard.
- 2. Choose the **Category** it relates to.
- 3. Add to the **Notification Team** which user(s) that are to complete the scorecard. More than one user can work on the same scorecard but the scores can only be input once so you may decide its more appropriate to have different scorers on different scorecards.
- 4. Select the **Review Period** this scorecard is to cover.
- 5. Enter the **Supplier** it is related to.
- 6. Click **Save** to finalise.



### Add Single Batch Schedule

If you want to manually publish this Template out as a one-off scorecard out to a group of users to complete their Supplier Performance Review, click on 'Add Single Batch Schedule'.

Add Sin			
AAA SIR	a a	1.24-1.6	

1	Q3 Supplier Scorecard	
Select the category optio	n *	
	Category: Area Select Category	Ŧ
	West 2	
Notification Team *		
Description		
NAME		
John Smith Managing Directo	or	×
Click to add another team	member or group	
Please select Notification Team	members.	
Select the Review Period	*	
(From the above selected Reporting Review Period	* Q3 (July to September) x + 2022	× ×
(From the above selected Reporting Review Period format)		X v
(From the above selected Reporting Review Period	Q3 (July to September) x * 2022	×
(From the above selected Reporting Review Period format) Select the Suppliers *	Q3 (July to September) x v vice e.g. Supplier	X
(From the above selected Reporting Review Period format) Select the Suppliers *	Q3 (July to September) x x TVice e.g. Supplier	X

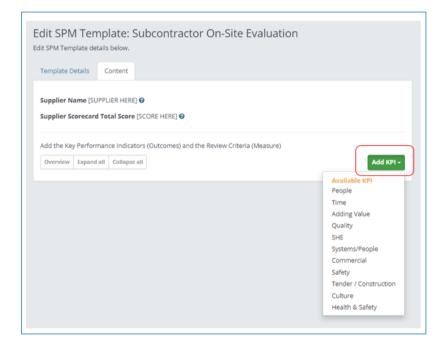
- 1. Enter the **Title** of the scorecard.
- 2. Choose the **Category** it relates to.
- 3. Add to the **Notification Team** which user(s) that are to complete the scorecard. More than one user can work on the same scorecard but the scores can only be input once so you may decide its more appropriate to have different scorers on different scorecards.
- 4. Select the **Review Period** this scorecard is to cover.
- 5. Enter the **Supplier** it is related to.
- 6. Choose to **Create this batch of records instantly** or to **Schedule these records to create on the first day of review period**.
- 7. Click **Save** to finalise.



#### Content

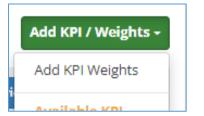
#### Add KPI

To begin, click on 'Add KPI' and choose one or more from the dropdown.



#### Add KPI Weights

If, on the 'Template Details' tab, you have selected to 'Assign Percentage/Points weightings' to your KPIs these can be configured, on the 'Content' tab, by clicking on the green 'Add KPI / weights' button followed by 'Add KPI Weights'.





KPI Weights Please Review the weig	hts you have assigned to each KPI	KPI Weights Please Review the weig	ghts you have assigned to each KPI
KPI Health and Safety	Weights in Percentage (%) Assign Percentage weightings (all KPI weights must sum up to 100%)	KPI	Weights in Points (absolute points) Assign Points weightings (points can be any whole number, they will be scaled up to 100% automatically)
Quality	40	Health and Safety	80
People	20	Quality	80
	Cancel		Cancel Save

Assign the percentages/points in the boxes provided (if using percentage, they must total up to 100%), and click 'Save'.

### Percentage

Template Details Content		
Supplier Name [SUPPLIER HERE] 😨		
Supplier Scorecard Total Score [SCORE HERE] 😡		
Add the Key Performance Indicators (Outcomes) and the Review C Overview Expand all Collapse all	riteria (Measure)	Add KPI / Weights -
<ul> <li>1. Health and Safety</li> <li>H&amp;S</li> </ul>	Weight: 40 %	O Add Review Criteria / Weights -
1.1. Accidents on Site		Weight: 0 %
• 1.2. H&S Training		Weight: 0 %
<ul> <li>2. Quality</li> <li>quality</li> </ul>	Weight: 40 %	Add Review Criteria / Weights -
2.1. Competence of workforce		Weight: 0 %
3. People     People	Weight: 20 %	Add Review Criteria / Weights -



### Points

Template Details Content		
Supplier Name (SUPPLIER HERE)  Supplier Scorecard Total Score [SCORE HERE]		
Add the Key Performance Indicators (Outcomes) and the Revie Overview Expand all Collapse all	w Criteria (Measure)	Add KPI / Weights +
<ul> <li>1. Health and Safety</li> <li>H&amp;S</li> </ul>	Weight: 80	Add Review Criteria -
<ul> <li>[NEW] Accidents on Site</li> <li>[NEW] H&amp;S Training</li> </ul>		<ul> <li></li> <li></li> </ul>
<ul> <li>Quality</li> <li>quality</li> </ul>	Weight: 80	Add Review Criteria -
[NEW] Competence of workforce		/



### Add Review Criteria

When you have chosen your KPI(s) you can then choose which Review Criteria you want in each by clicking on 'Add Review Criteria' and choosing from the dropdown. If you want to remove a Review Criteria you can also do this via the dropdown.

Iit SPM Template: Subcontrac	ttor On-Site Evaluation
emplate Details Content	
upplier Name [SUPPLIER HERE] 🚱	
upplier Scorecard Total Score [SCORE HERE] 🚱	
dd the Key Performance Indicators (Outcomes) ar	nd the Review Criteria (Measure)
Overview Expand all Collapse all	Add KPI -
	Add KPI - Add Review Criteria -
<ul> <li>[NEW] People</li> </ul>	Add Review Criteria - Remove Available Review Criteria
[NEW] People     People	Add Review Criteria - Remove
[NEW] People     People     [NEW] Time	Remove Available Review Criteria Adequacy of supervision

### Add Review Criteria Weights

If, on the 'Template Details' tab, you have selected to 'Assign Percentage/Points weightings' to your Review Criteria these can be configured, on the 'Content' tab, by clicking on the blue 'Add Review Criteria / Weights' button followed by 'Add Review Criteria Weights'.





Review Criteria W Please Review the weights - Health and Safety	/eights you have assigned to each of the Review Criteria for KPI
REVIEW CRITERIA	Weights in Percentage (%) Assign Percentage weightings to Review Criteria (all KPI's Review Criteria weights must sum up to 100%)
Accidents on Site	60
H&S Training	40
	Cancel Save

Assign the percentages in the boxes provided, totalling up to 100%, and click 'Save'.

•	1. Health and Safety	Weight: 40 %	Add Review Criteria / Weights -
•	1.1. Accidents on Site		Weight: 60 %
•	1.2. H&S Training		Weight: 40 %

### Publish Template

When you have added all your KPIs and Review Criteria and have set the relevant weightings for each you are now ready to publish the Template.

Summary	You are about to Publi	sh a SPM Template
DRAFT Publish Template	Please review the following SPM Template Name: SPM Template Type: Category Fields:	g <b>information before submitting</b> Subcontractor On-Site Evaluation - Quarterly Standard Area
Save Details		Cancel





The status will then change to 'Published'.

Summary
PUBLISHED
Save Details
Clone   Delete

Creating and completing SPM Records is covered in 'Supplier Performance Management – Scorer Guide'.