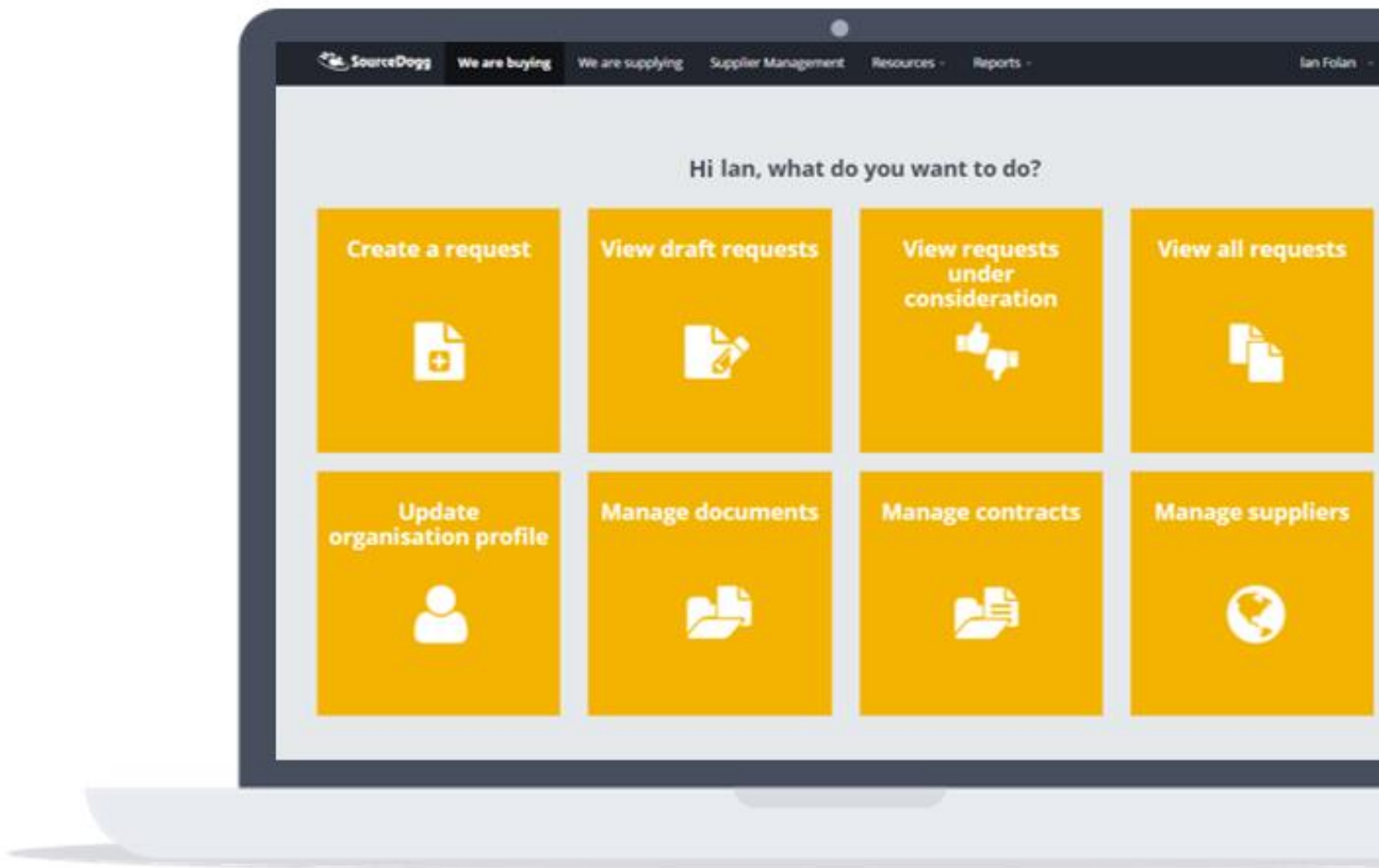




# Supplier Performance Management Admin Guide

Date: June 2022



## Contents

Contents .....	2
1. Introduction .....	2
2. SPM User Permissions.....	3
3. SPM Settings .....	5
SPM Custom Fields.....	6
SPM KPI Fields.....	7
SPM Review Criteria.....	8
Category Settings .....	12
Create Category .....	12
4. Where to find SPM.....	14
5. SPM Module .....	16
Templates .....	17
Create Template .....	18

## 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.

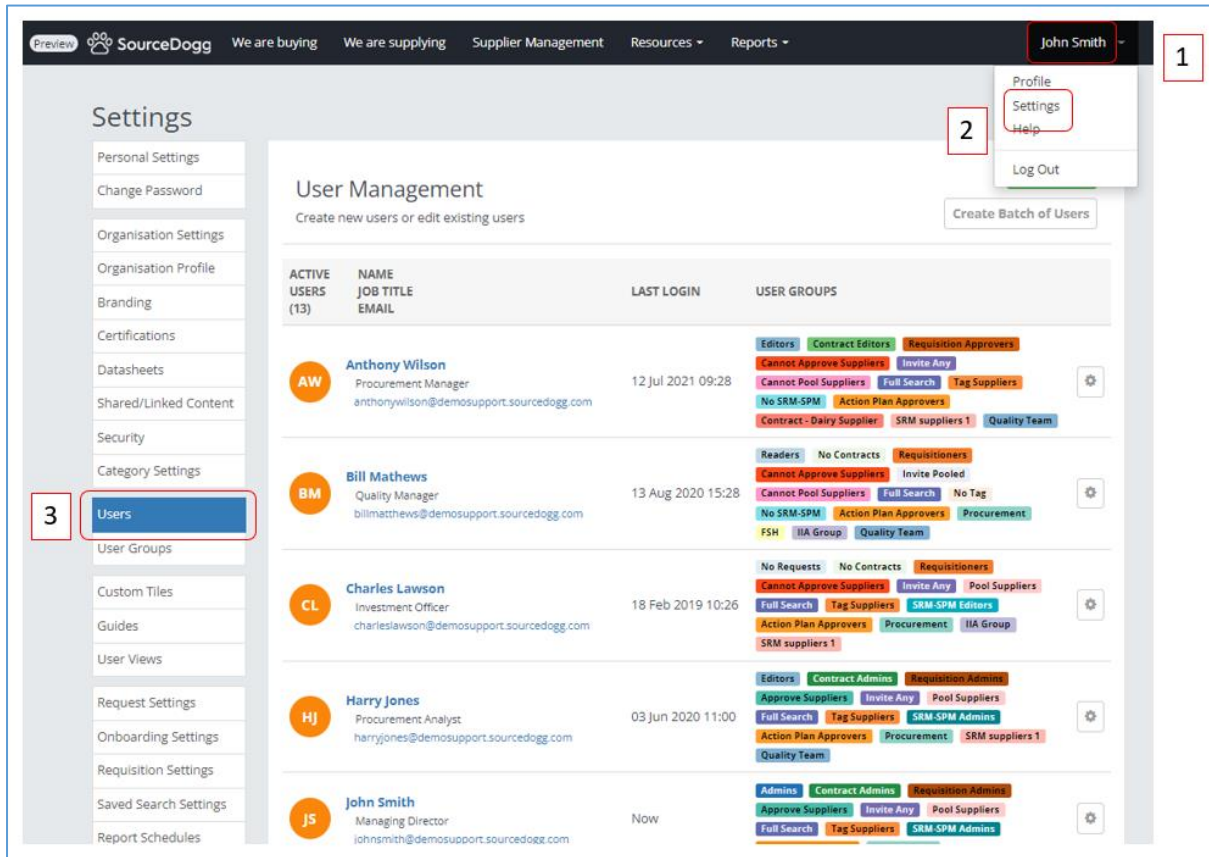
There is a subsequent guide that will look at the **SPM Records** – how to create and complete a scorecard.

## 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).



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 [here](#).

SRM/SPM Permissions Group  SRM-SPM Admins  SRM-SPM Editors  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

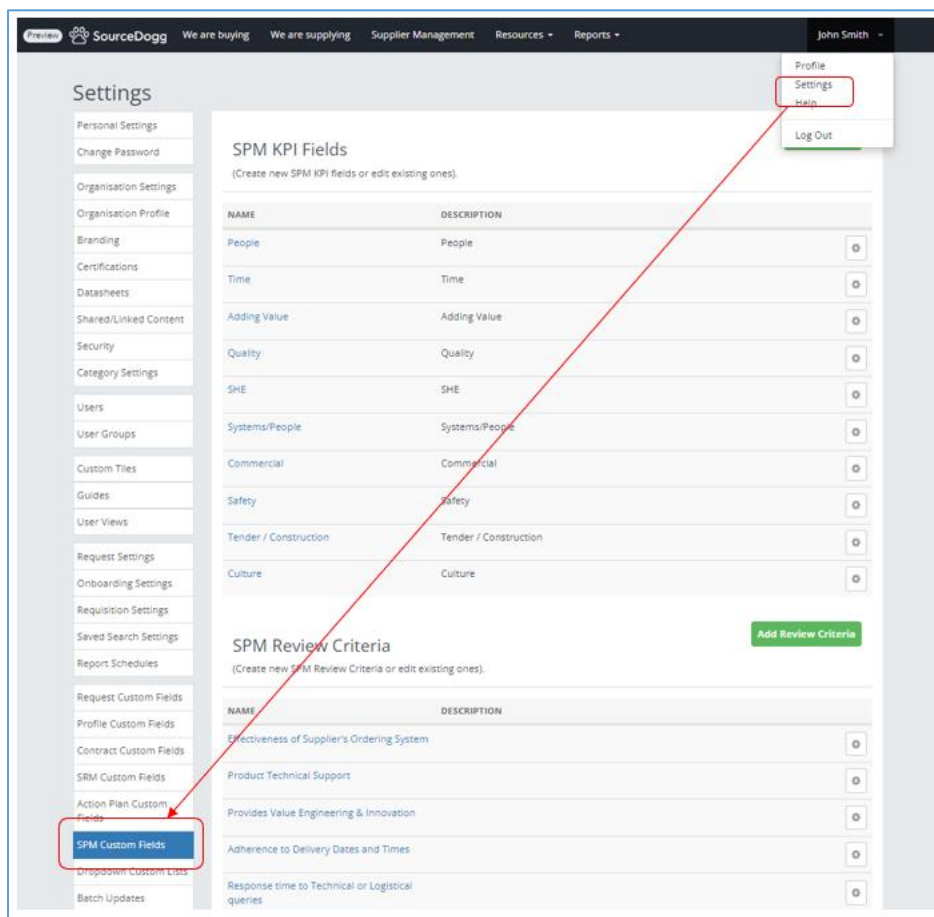
As an SPM Admin you must first create your **SPM Templates**. This is your scorecard your users will complete to assess your suppliers' performance. It is made up of a set of KPIs, and within those KPIs - Review criteria, specific to a type of supplier, business unit, project etc.

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.

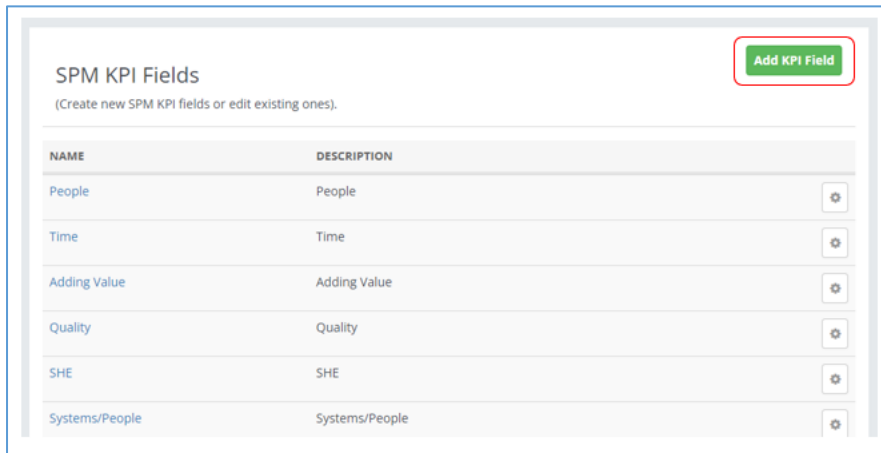
## SPM Custom Fields

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.



## SPM KPI Fields

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



### 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.

**SPM KPI Fields**  
 Edit the KPI field below. Any changes are applied instantly. When modifying existing KPI fields note that existing values in these fields will not be affected.

**Name \***

**Description \***

**Unit (optional)**

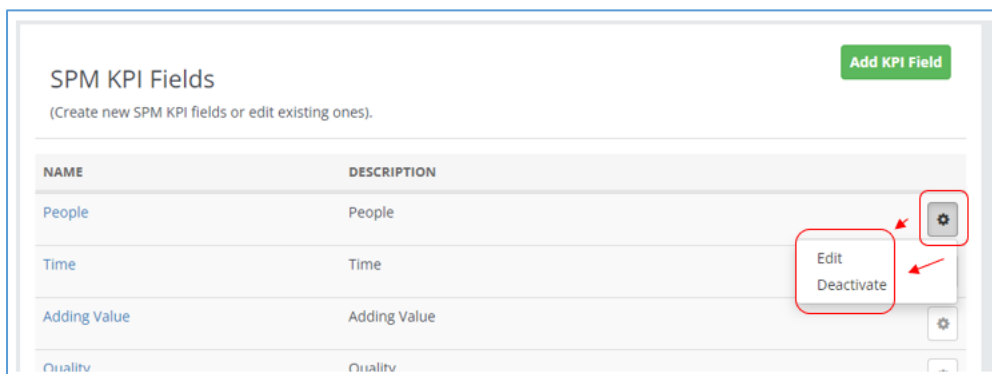
**Set Target (optional)**

**Set Tags**

Add tags to the KPI field to include the Performance themes or Performance Policies etc which will be used for reporting purposes.

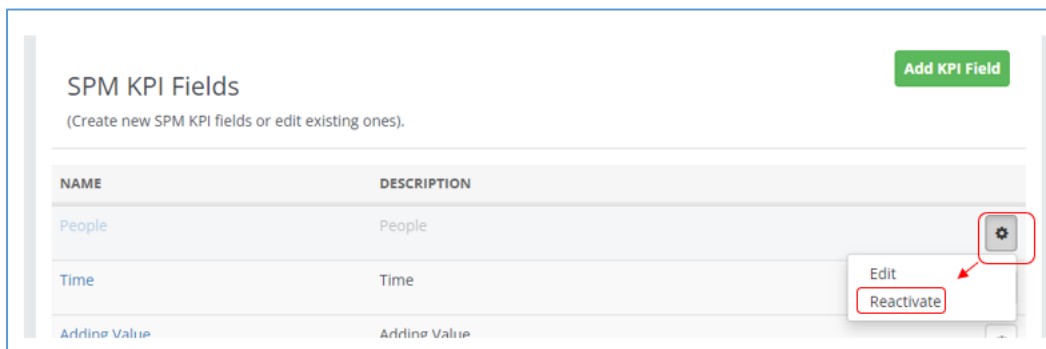
**Save** **Cancel**

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



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.



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 Criteria

(Create new SPM Review Criteria or edit existing ones).

[Add Review Criteria](#)

NAME	DESCRIPTION	
Effectiveness of Supplier's Ordering System		
Product Technical Support		
Provides Value Engineering & Innovation		
Adherence to Delivery Dates and Times		
Response time to Technical or Logistical queries		
Overall Service Performance		
Handling of Documentation Queries		
Adequacy of supervision	Adequacy of supervision	

Add Review Criteria

### SPM Review Criteria

Edit the SPM Review Criteria below.

---

**Name \***

**Description** 1

**Scoring Scale \*** 2

**Start Value \***

**End Value \***

**Scoring Guidelines**

SCORE VALUE	DESCRIPTION
0	<input type="text" value="Poor or non-existent"/>
1	<input type="text" value="Errors &amp; omissions noted"/>
2	<input type="text" value="Documentation needs resubmitting"/>
3	<input type="text" value="All records/documents timely and to specification"/>
4	<input type="text" value="Timely and to spec. drives improvement"/>
5	<input type="text" value="Excellent &amp; support Costain or JV position"/>

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.

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**.

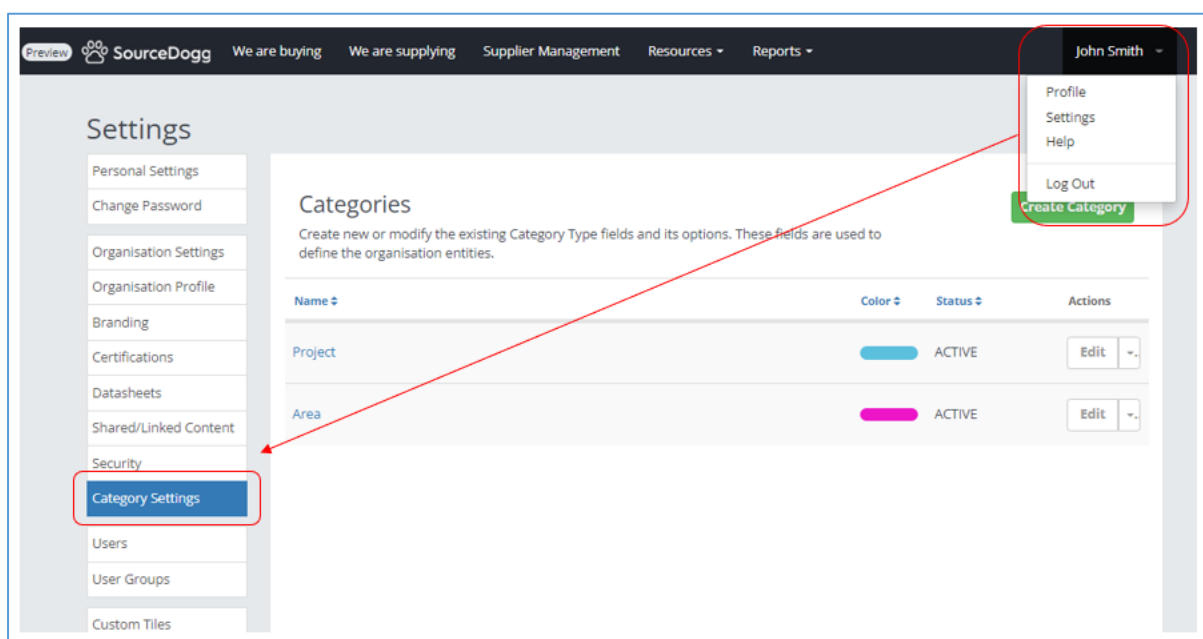
NAME	DESCRIPTION	
Effectiveness of Supplier's Ordering System		⚙️
Product Technical Support		
Provides Value Engineering & Innovation		
Adherence to Delivery Dates and Times		⚙️
Response time to Technical or Logistical queries		⚙️

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.

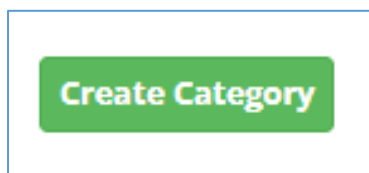
## Category Settings

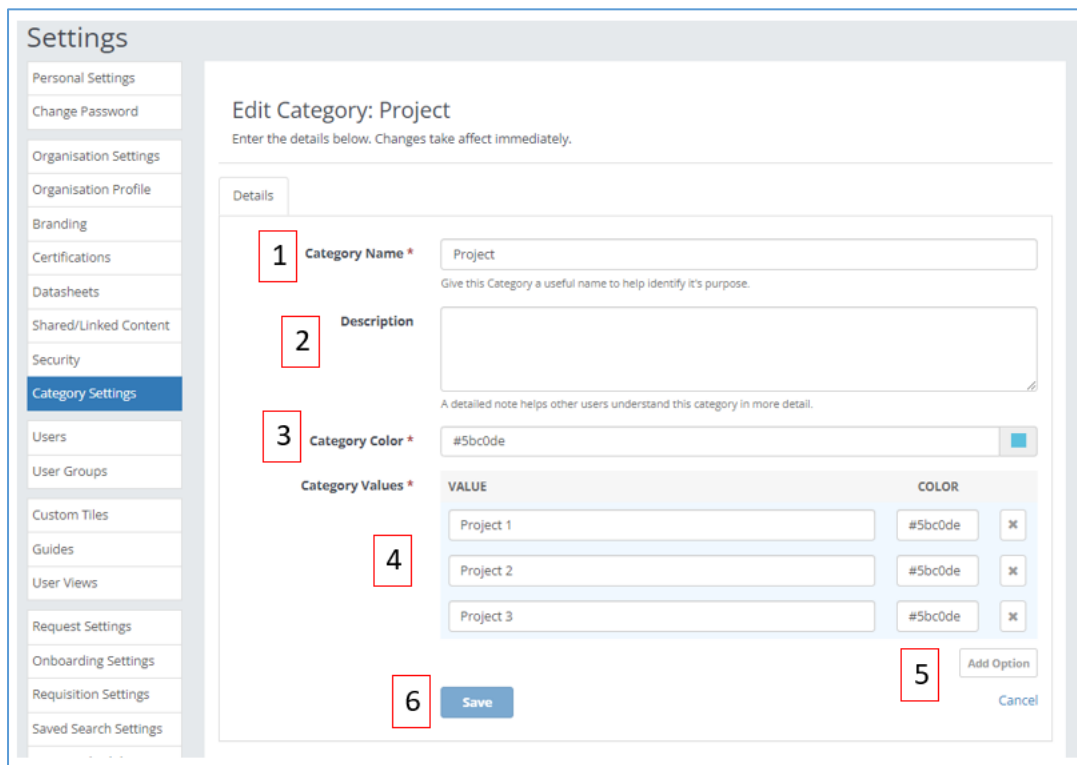
Category Settings can be found, by Account Admins, in your Organisation Settings. It can be used to create projects or divisions within a company that can be stored in the system as a dropdown to be used in the SPM module. This is useful if a supplier is to be assessed multiple times by your organisation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



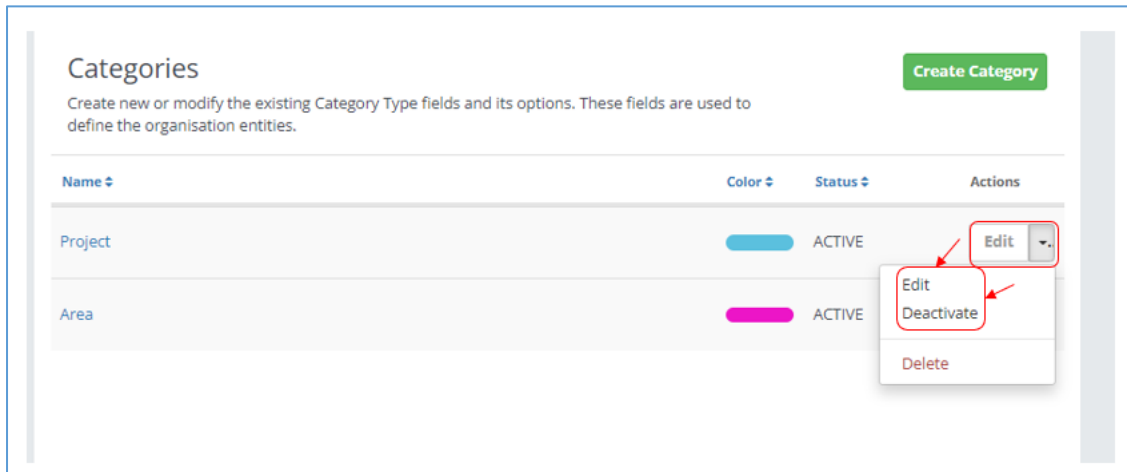
## Create Category

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





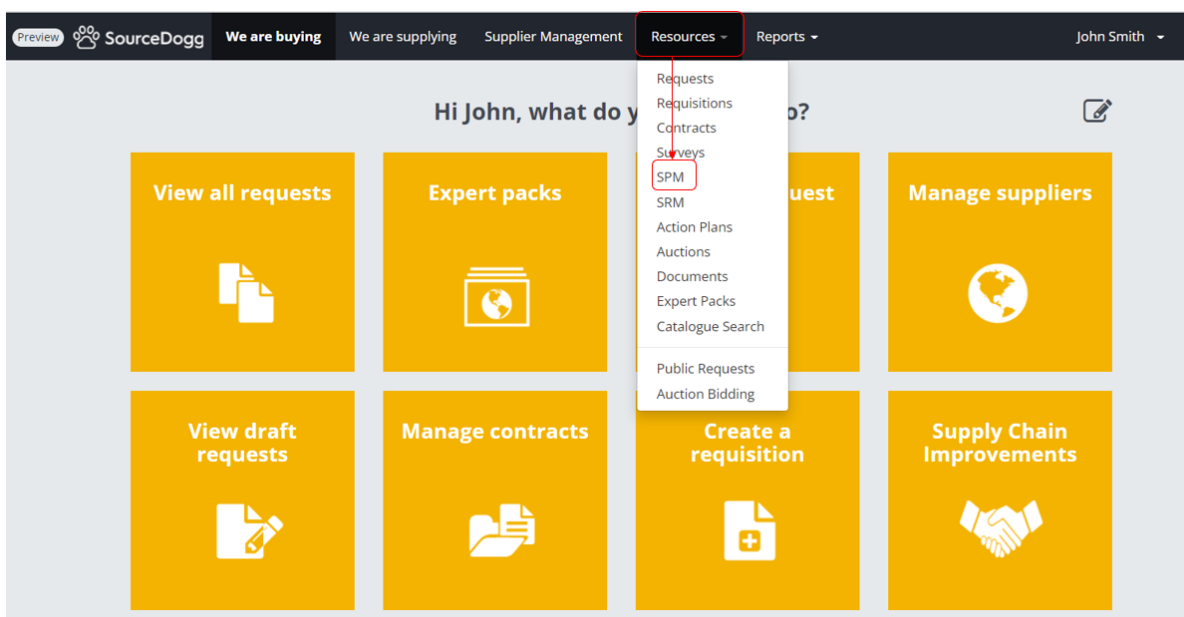
1. Enter the **Category Name**, this is a mandatory field.
2. You can provide an optional **Description** to let users know more about it.
3. Choose the **Category Colour** by clicking in the box and selecting the preferred colour.
4. Enter the options into the **Category Values** boxes. Each option 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.



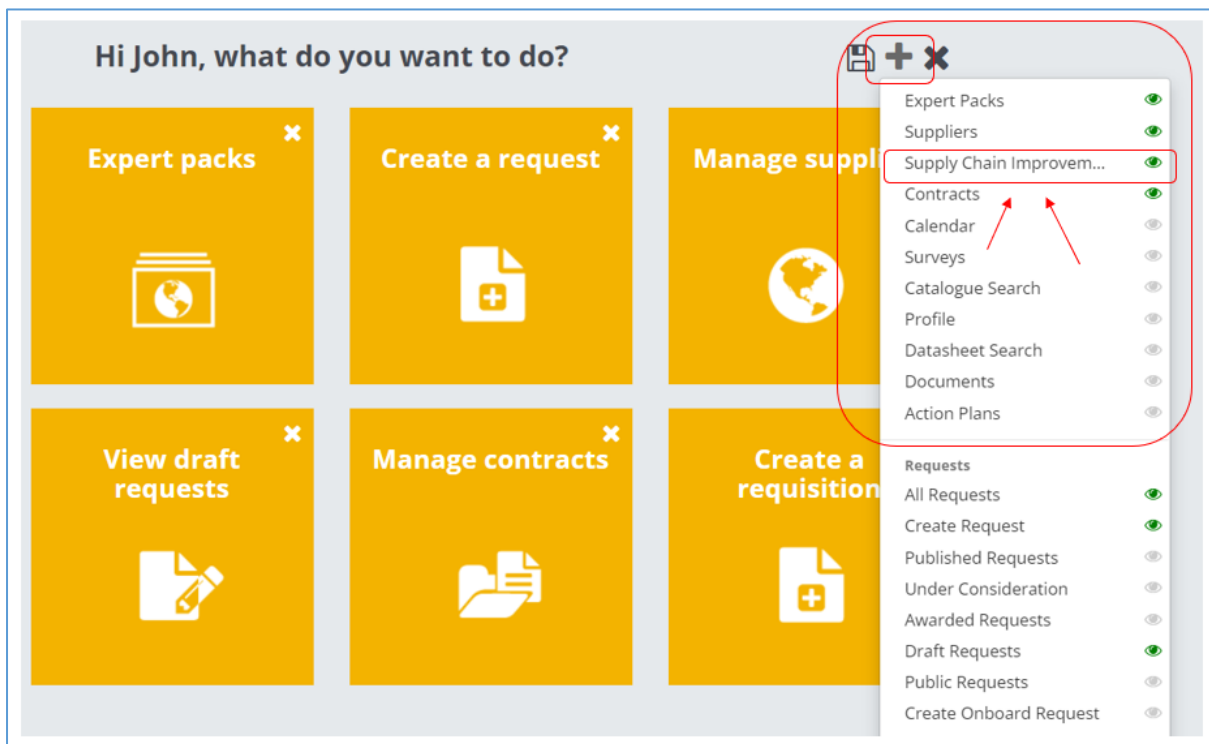
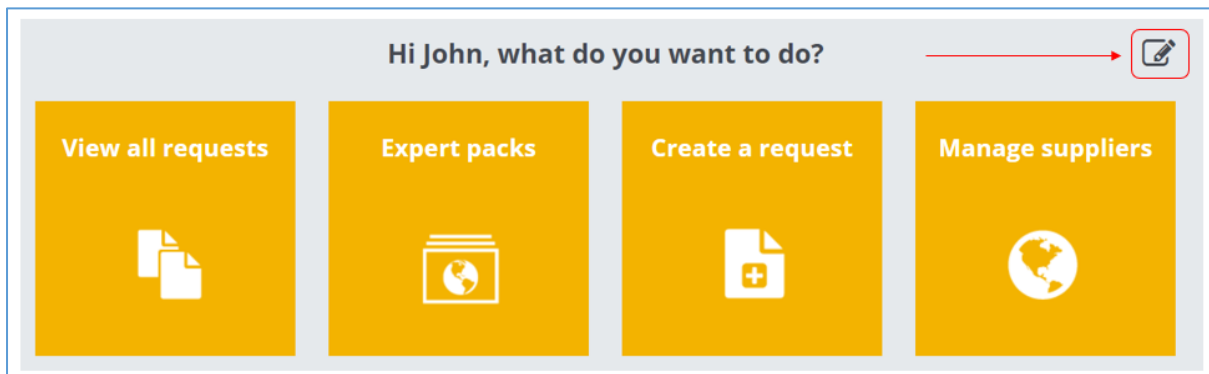
To Edit or Deactivate a Category click on the dropdown opposite the desired Category and select the relevant option. Deactivating the Category will mean it is unavailable to users.

#### 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.



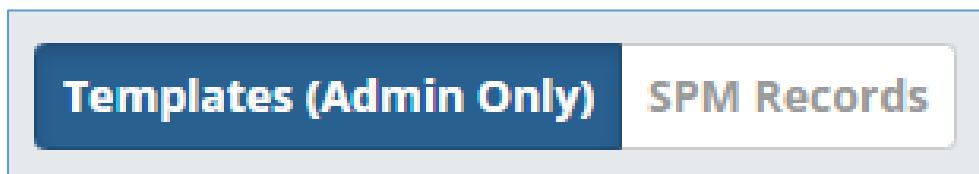
The Supply Chain Improvements tile is where you can access 3 different SourceDogg modules – SRM (Supplier Relationship Management), SPM (Supplier Performance Management) and Action Plans.

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



## 5. SPM Module

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

The screenshot displays the SourceDogg SPM Templates interface. At the top, the navigation bar includes 'SourceDogg', 'We are buying', 'We are supplying', 'Supplier Management', 'Resources', and 'Reports'. The user 'John Smith' is logged in. The main content area is titled 'SPM Templates' and features a 'Create Template' button. Below this, there is a dropdown filter set to 'All SPM Templates (2)', a search box, and a table of templates. The table has columns for Template Type, Title, Category Type, Created, and Status. Two templates are listed: 'Materials and Plant' and 'Subcontractor', both with a 'Category Type' of 'Area' and a 'Status' of 'PUBLISHED'. A dropdown menu is open next to the first template, showing options for 'View', 'Clone', and 'Deactivate'.

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

Create Template

### Template Details

Templates (Admin Only) SPM Records

### Edit SPM Template: Subcontractor On-Site Evaluation

Edit SPM Template details below.

Template Details Content

SPM Template Type \*

Standard

1 Title \*

Subcontractor On-Site Evaluation

Description

2

Select the category

3 Select Category Type...

Projects

Back to SPM Templates

Summary

**DRAFT**

Publish Template

Save Details

Delete

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.

The screenshot shows a configuration form with the following elements:

- 4**: A dropdown menu labeled "Set Reporting Review Period format \*" with "Quarterly" selected.
- 5**: A section titled "Set the KPI / Review Criteria Weightings \*" with a descriptive paragraph and a "KPI weighting mode:" section containing three radio button options.
- 6**: A section titled "Review Criteria weighting mode:" containing three radio button options.
- 7**: A section titled "Add a schedule to this template (Optional)" with a descriptive paragraph and two green buttons: "Add Recurring Auto-Schedule" and "Add Single Batch Schedule". To the right of these buttons are two blue "Import" buttons.

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 batch schedule to your template to create a one-time template schedule).

Add Recurring Auto-Schedule Import

Add Single Batch Schedule Import

Import



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)

Download

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 Import

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.

Title of the instance	Category: Please use the following format: Category: Value Use ';' to separate multiple categories	Review Period: according to Review Period format specified in the template	Team Use ';' to separate multiple items	List of suppliers Use ';' to separate multiple items	
Title	Category	Period	Year	Username	Supplier
January Supplier Performance Review	Area: Central; Area: Logistics	January	2022	johnsmith@demosupport.sourcedogg.com ; harryjones@demosupport.sourcedogg.com	EFV; Internatic SCM Inter
February Supplier Performance Review	Area: Central; Area: Logistics	February	2022	charleslawson@demosupport.sourcedogg.com	EFV; Internatic SCM Inter
March Supplier Performance Review	Area: Central; Area: Logistics	March	2022	harryjones@demosupport.sourcedogg.com	EFV
April Supplier Performance Review	Area: Central; Area: Logistics	April	2022	johnsmith@demosupport.sourcedogg.com	RMH Indu

3. Attach the populated 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)

[Download](#)

**Step 2 - Upload the completed Auto-Schedule instance details:**  
(this will import the updated and completed Auto-Schedule instances)

Attach a file

SPM Schedule Import Template (1).xlsx 10 KB ×




Cancel
Import


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.

**▼ 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** **Import**



▶	January Supplier Performance Review	
▶	February Supplier Performance Review	<div style="border: 1px solid #ccc; padding: 2px;"><b>Edit</b> Cancel</div>
▶	March Supplier Performance Review	
▶	April Supplier Performance Review	

▼ January Supplier Performance Review 

**Title \***

**Category list option \***  
Central Logistics

**Notification Team \***  
Description

NAME	
	<b>John Smith</b> Managing Director
	<b>Harry Jones</b> Procurement Analyst

**Select the start of the Review Period \***

**Select the Suppliers \***

### 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 Recurring Auto-Schedule

**▼ 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 Import

**Title \*** 1

**Select the category option \***

Central
2
Category: Area Select Category...

**Notification Team \***

Description

NAME
<div style="display: flex; align-items: center;"> <div style="background-color: #FF9800; color: white; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">JS</div> <div> <p><b>John Smith</b></p> <p>Managing Director</p> </div> <div style="margin-left: auto; text-align: right; color: #ccc;">×</div> </div>
<span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 3px;">Click to add another team member or group</span>

Please select Notification Team members.

**Select the start of the Review Period \***

(From the above selected Reporting Review Period format)

Q2 (April to June) × ▼

2022 × ▼

**Select the Suppliers \***

× International Courier Service e.g. Supplier

6

Cancel
Save

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 Single Batch Schedule

The screenshot shows a form titled 'Add Single Batch Schedule' with the following fields and callouts:

- 1**: Title \* (Text input: Q3 Supplier Scorecard)
- 2**: Select the category option \* (Category: Area, Select Category... dropdown)
- 3**: Notification Team \* (Description: John Smith, Managing Director; Click to add another team member or group)
- 4**: Select the Review Period \* (From the above selected Reporting Review Period format: Q3 (July to September), 2022)
- 5**: Select the Suppliers \* (International Courier Service, e.g. Supplier)
- 6**: Schedule the single batch (Create this batch of records instantly / Schedule these records to create on the first day of review period)
- 7**: Save button

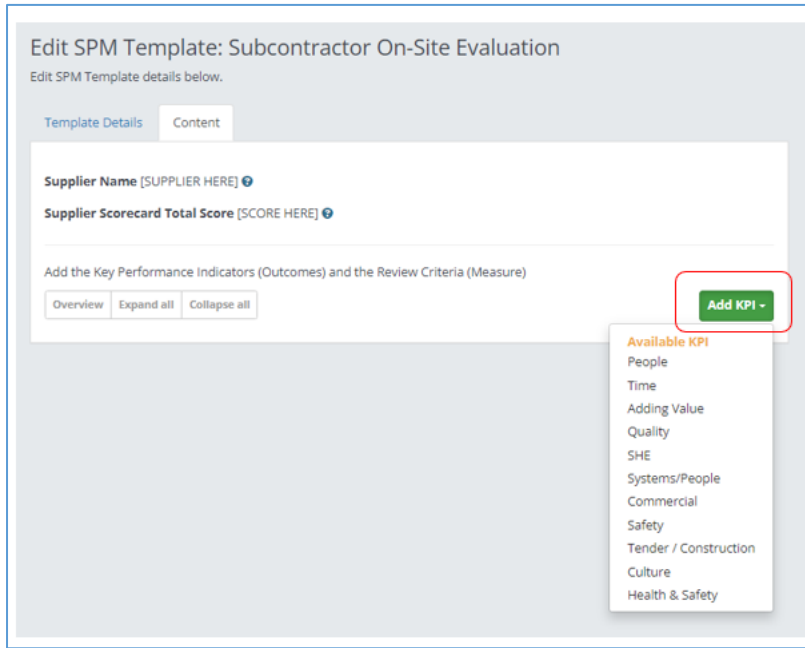
1. Enter the **Title** of the scorecard.
2. Choose the **Category** it relates to.
3. Add to the **Notification Team** which user(s) that are to complete the scorecard. More than one user can work on the same scorecard but the scores can only be input once so you may decide its more appropriate to have 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

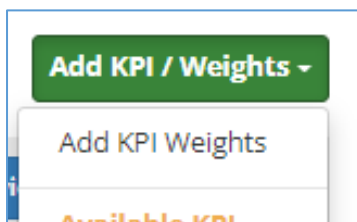
Add KPI

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 weights you have assigned to each KPI

KPI	Weights in Percentage (%)
<small>Assign Percentage weightings (all KPI weights must sum up to 100%)</small>	
Health and Safety	<input type="text" value="40"/>
Quality	<input type="text" value="40"/>
People	<input type="text" value="20"/>

### KPI Weights

Please Review the weights you have assigned to each KPI

KPI	Weights in Points (absolute points)
<small>Assign Points weightings (points can be any whole number, they will be scaled up to 100% automatically)</small>	
Health and Safety	<input type="text" value="80"/>
Quality	<input type="text" value="80"/>

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 Criteria (Measure)

Overview | Expand all | Collapse all

<p>▼ <b>1. Health and Safety</b></p> <p>H&amp;S</p>	Weight: 40 %	<input type="button" value="Add Review Criteria / Weights -"/>
<p>▶ 1.1. Accidents on Site</p>		Weight: 0 % <input type="button" value="✎"/>
<p>▶ 1.2. H&amp;S Training</p>		Weight: 0 % <input type="button" value="✎"/>
<p>▼ <b>2. Quality</b></p> <p>quality</p>	Weight: 40 %	<input type="button" value="Add Review Criteria / Weights -"/>
<p>▶ 2.1. Competence of workforce</p>		Weight: 0 % <input type="button" value="✎"/>
<p>▼ <b>3. People</b></p> <p>People</p>	Weight: 20 %	<input type="button" value="Add Review Criteria / Weights -"/>

### Points

Template Details Content

Supplier Name [SUPPLIER HERE] ⓘ

Supplier Scorecard Total Score [SCORE HERE] ⓘ

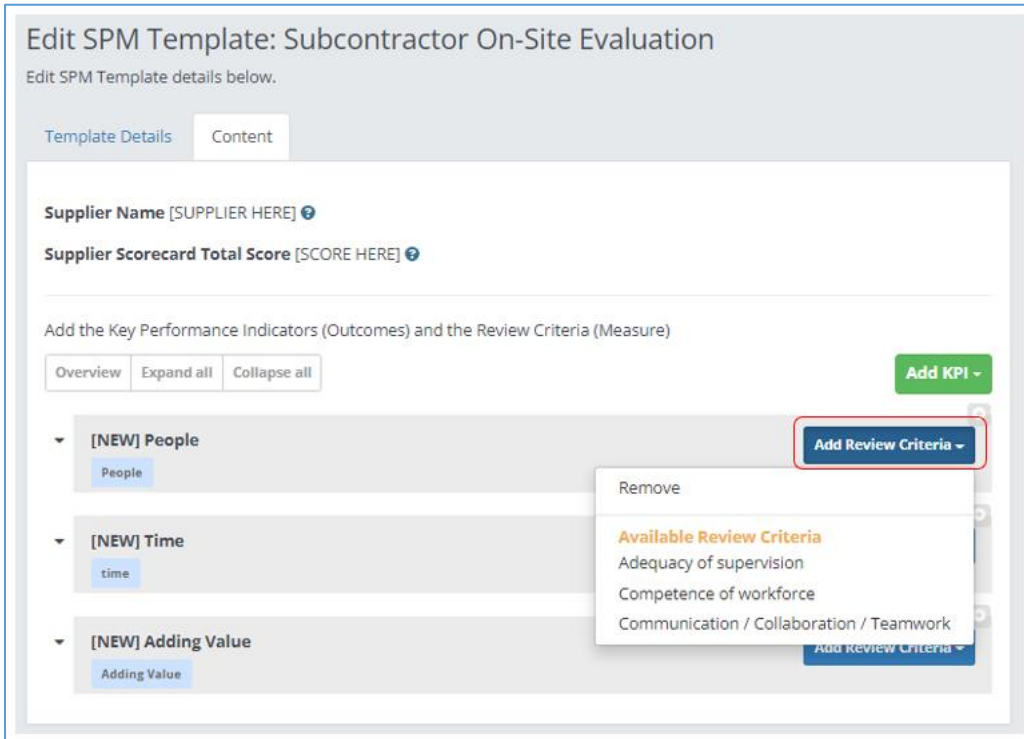
Add the Key Performance Indicators (Outcomes) and the Review Criteria (Measure)

Overview Expand all Collapse all Add KPI / Weights ▾

- 1. Health and Safety (Weight: 80) Add Review Criteria ▾
  - H&S
  - [NEW] Accidents on Site
  - [NEW] H&S Training
- 2. Quality (Weight: 80) Add Review Criteria ▾
  - quality
  - [NEW] Competence of workforce

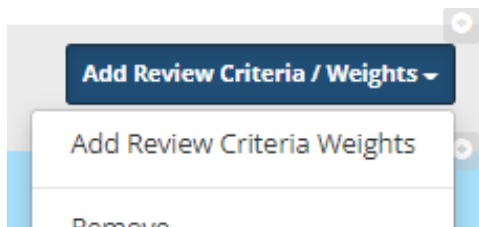
### Add Review Criteria

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.



### 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 Weights

Please Review the weights you have assigned to each of the Review Criteria for KPI - Health and Safety

REVIEW CRITERIA	Weights in Percentage (%)
Accidents on Site	<input type="text" value="60"/>
H&S Training	<input type="text" value="40"/>

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

1. Health and Safety
Weight: 40 %
Add Review Criteria / Weights

H&S

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

DRAFT

Delete

➔

You are about to Publish a SPM Template

---

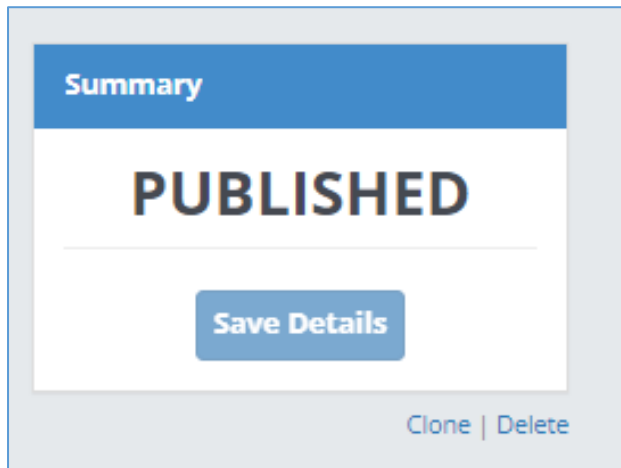
Please review the following information before submitting

**SPM Template Name:** Subcontractor On-Site Evaluation - Quarterly

**SPM Template Type:** Standard

**Category Fields:** Area

The status will then change to 'Published'.



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