Supplier Performance Management Administrator Guide

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Contact Us

Visit us at www.zycus.com. For queries, contact customer support at:

Email id: tech-support@zycus.com

US Toll free: +1-800-409-3507 | +1-866-363-6625

International Toll free: + 800-9928-7111 | + 800-9928-7000

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Chapter 1 Administration

1.1 Introduction

The actions that a user can perform and the controls that the user can access depend on the rights and privileges granted to the user; hence the interface components (such as, buttons, tabs, and links) visible on the screen may differ between users. This aspect needs to be kept in mind while understanding the steps to change settings. The administration functionalities are controlled from the **Setup** tab.

1.2 Defining Configurations

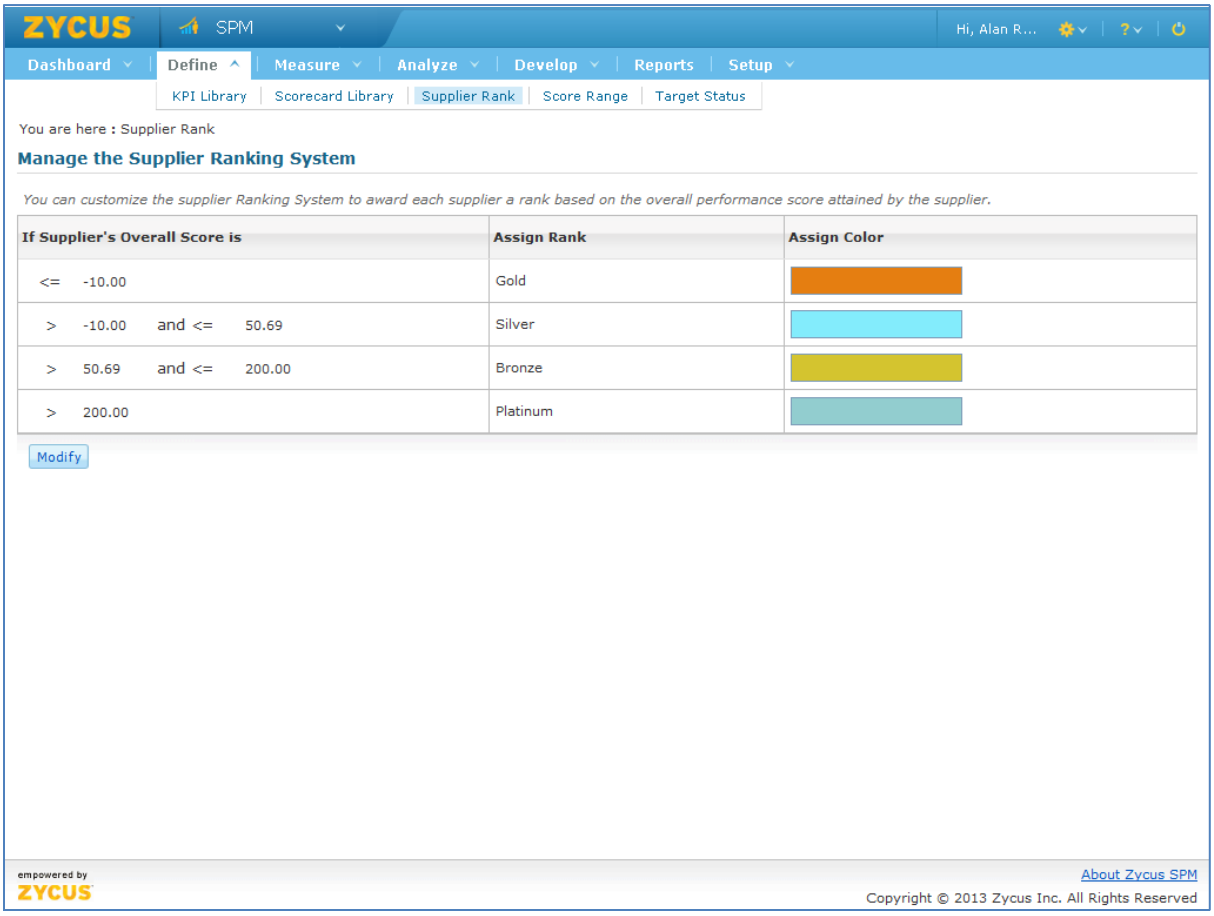
1.2.1 Managing Supplier Ranking System

You can customize the supplier ranking system to award each supplier a rank based on the overall performance score attained by the supplier.

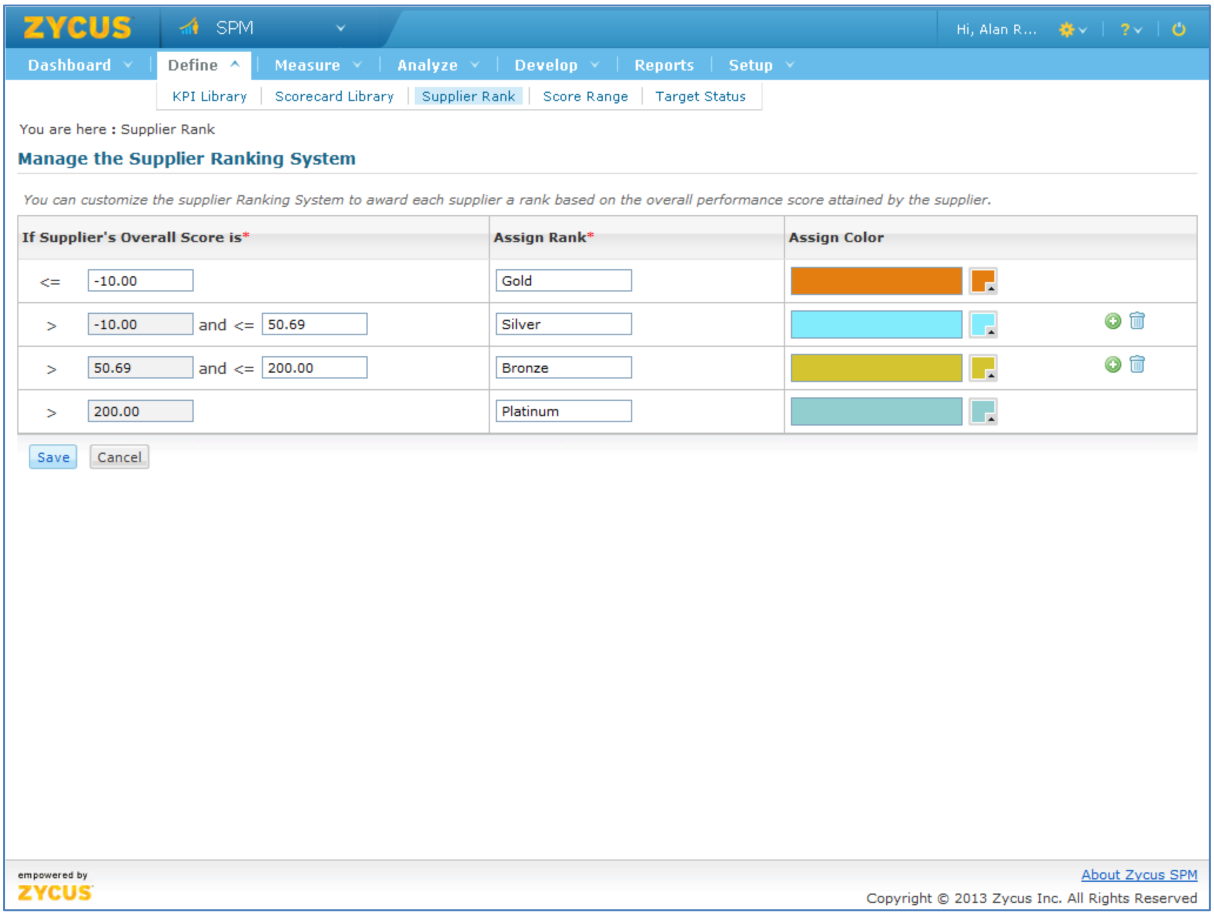
Note: *The Ranking System can be modified at any time and it will be reflected across the application immediately for old and future scores.*

To manage supplier ranking system:

1. Click **Define** tab.
2. Click **Supplier Rank** sub-tab. The following page is displayed.



3. Click **Modify** to modify the ranking system. The following page is displayed.



4. Enter the required details.
5. Click **Save**. The following message is displayed.

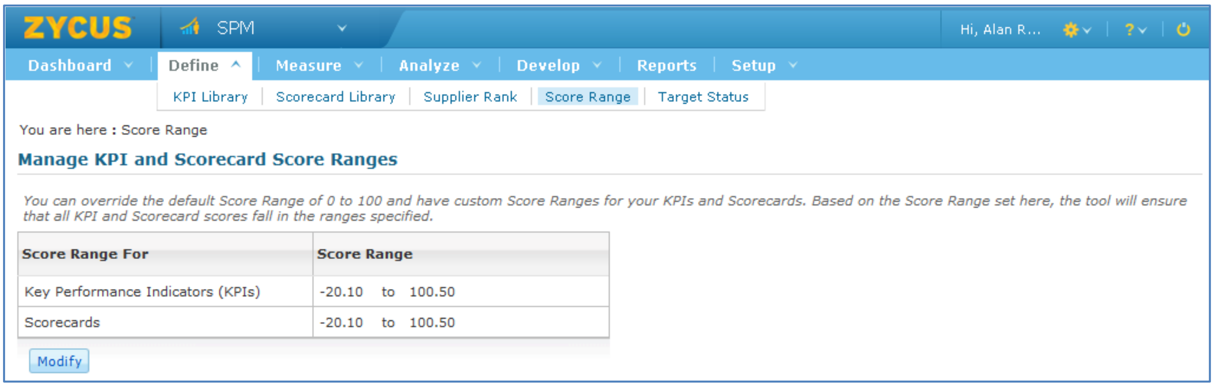
1.2.2 Managing Score Ranges for KPIs & Scorecards

You can override the default score range of 0 to 100 and have custom score ranges for your KPIs and Scorecards. Based on the score range set here, all KPI and Scorecard scores will fall in the ranges specified.

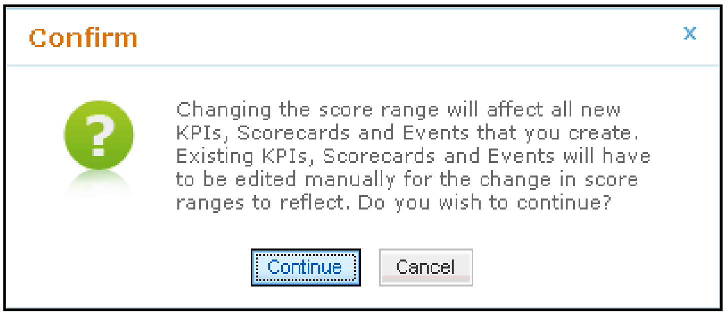
Note: *If the Score Ranges are modified after data (KPI, Scorecard, and Event) is created in the system, none of the existing data will be affected, unless edited.*

To manage score ranges for KPIs & scorecards:

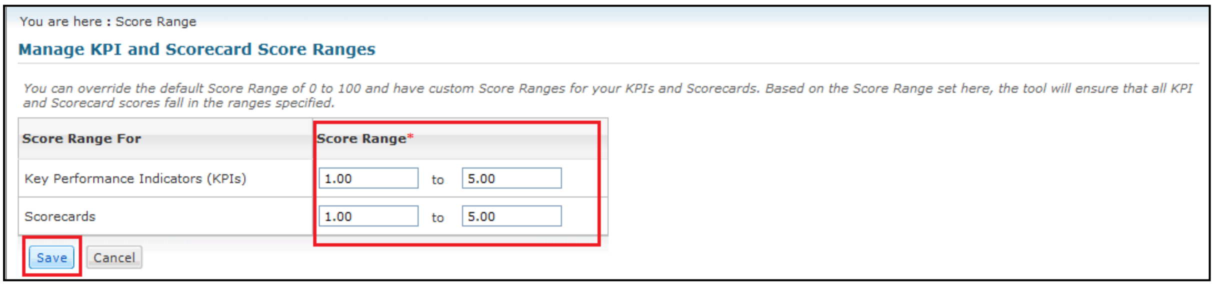
1. Click **Define** tab.
2. Click **Score Range** sub-tab. The following page is displayed.



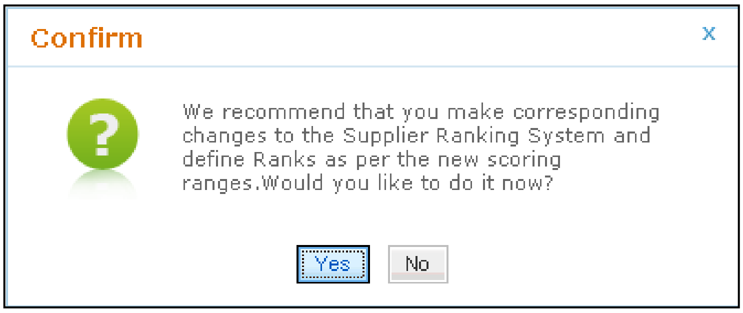
3. Click **Modify** to modify the score range. The following warning message is displayed.



4. Click **Continue**. The following page is displayed.



5. Enter the required details.
6. Click **Save**. The following message is displayed.



7. Click **Yes** to manage the supplier ranking system. For more details, see Managing Supplier Ranking System.
8. Click **No** to save the score range defined

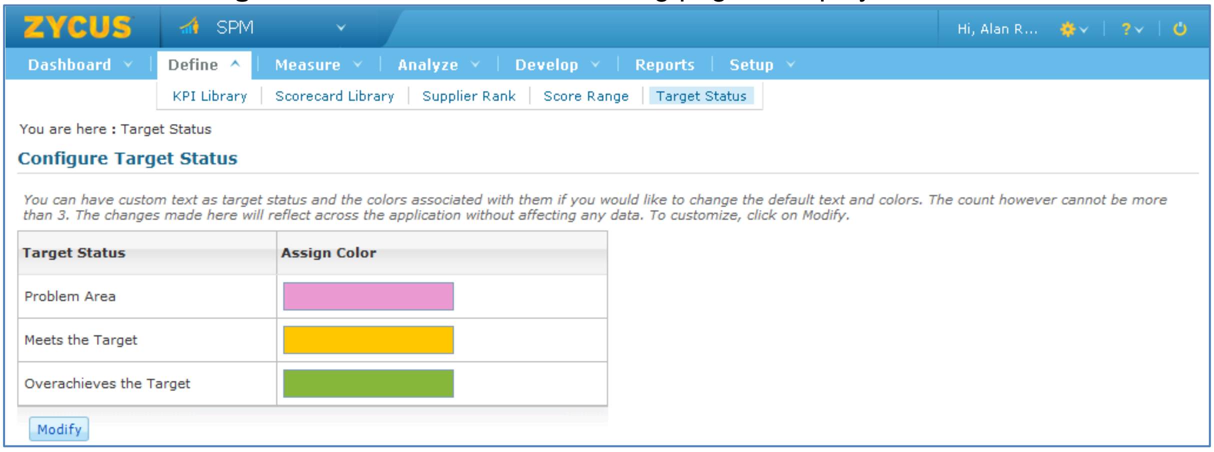
1.2.3 Configuring Target Status

You can have custom text as target status and the colors associated with them if you would like to change the default text and colors. The count however cannot be more than three.

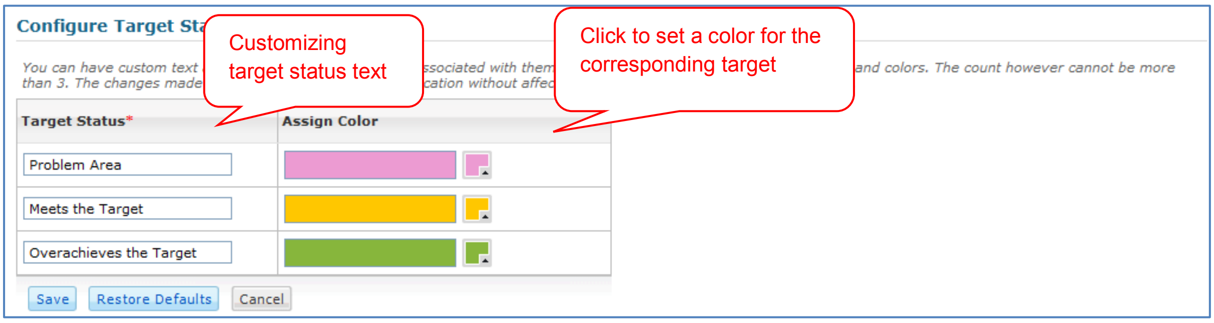
Note: *The Target Statuses can be modified at any time and it will reflect across the application immediately for old and future scores.*

To configure target status:

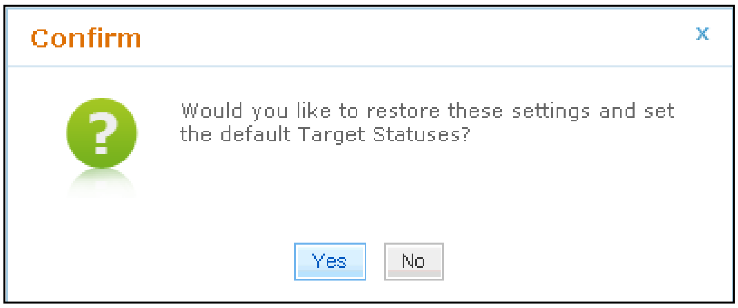
1. Click **Define** tab.
2. Click **Target Status** sub-tab. The following page is displayed.



3. Click **Modify** to modify the target status. The following page is displayed.



4. Click **Restore Defaults** to restore default text and color for the target status. The following message is displayed.



5. Click **Save** to save the changes made. The following message is displayed.

1.3 Defining Client Settings

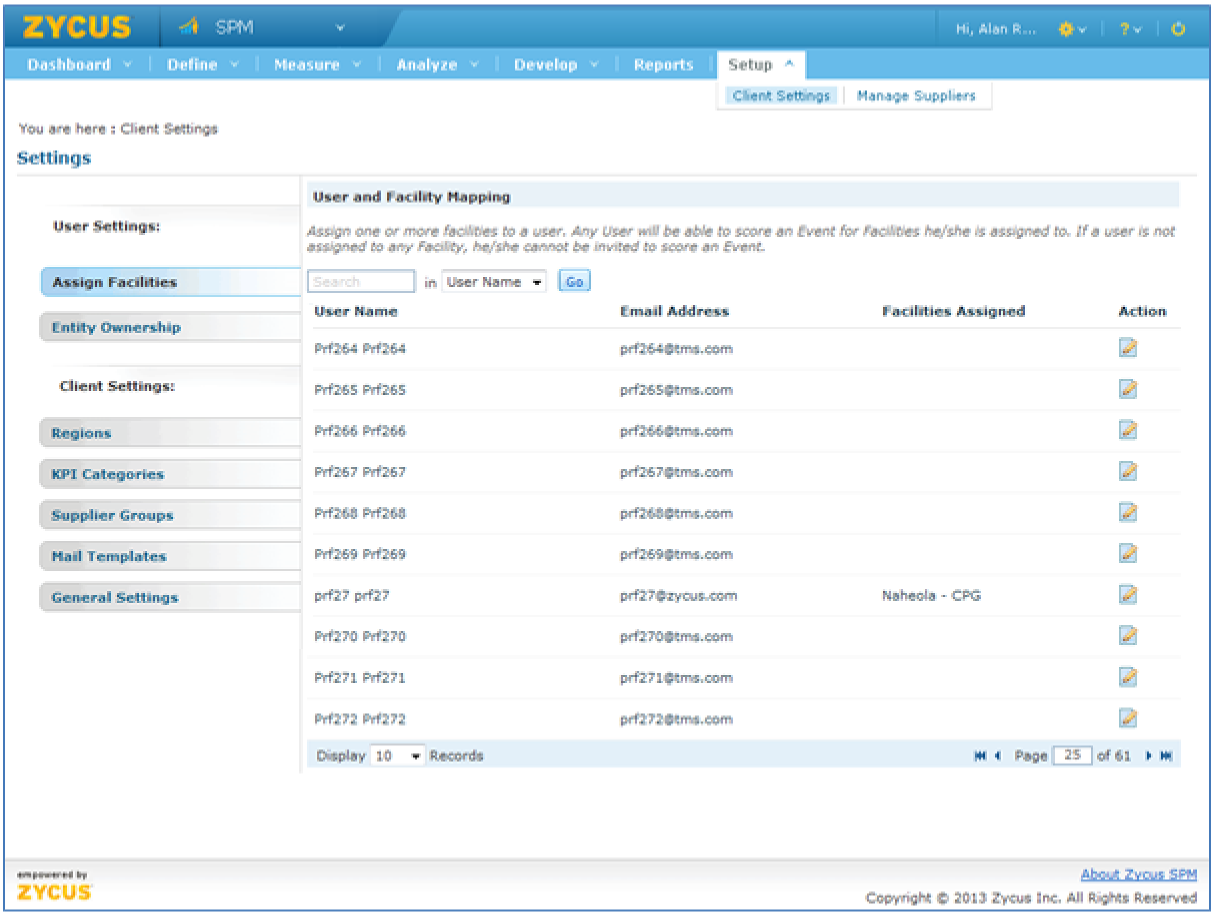
1.3.1 User Settings

1.3.1.1 Assigning Facilities

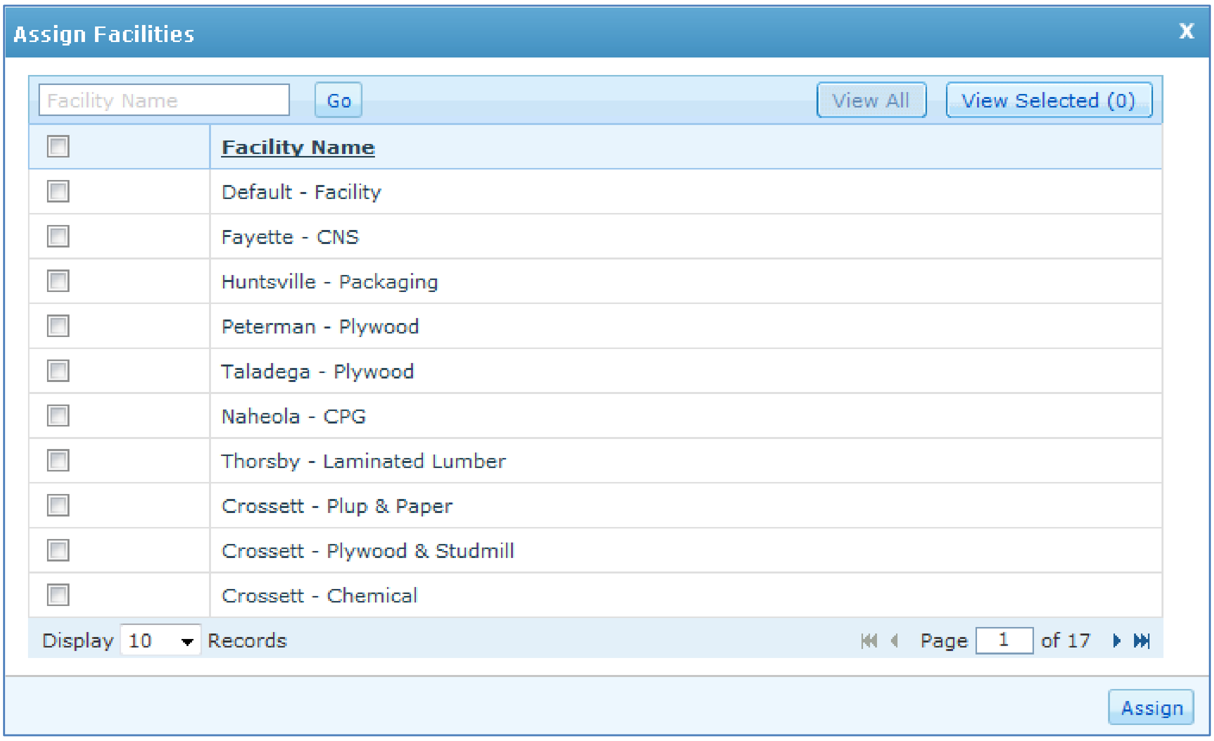
You can assign one or more facilities to the user. Any User will be able to score an Event for the Facilities he/she is assigned to. If a user is not assigned to any Facility, he/she cannot be invited to score an Event.

To assign facilities:

1. Logon to the SPM application.
2. Click **Setup** tab.
3. Click **Client Settings** sub-tab under **Settings** tab.
4. Under **User Settings** section, click **Assign Facilities**. The **User and Facility Mapping** page is displayed.



5. Click  corresponding to a user name to assign facilities to that user. The **Assign Facilities** page is displayed.



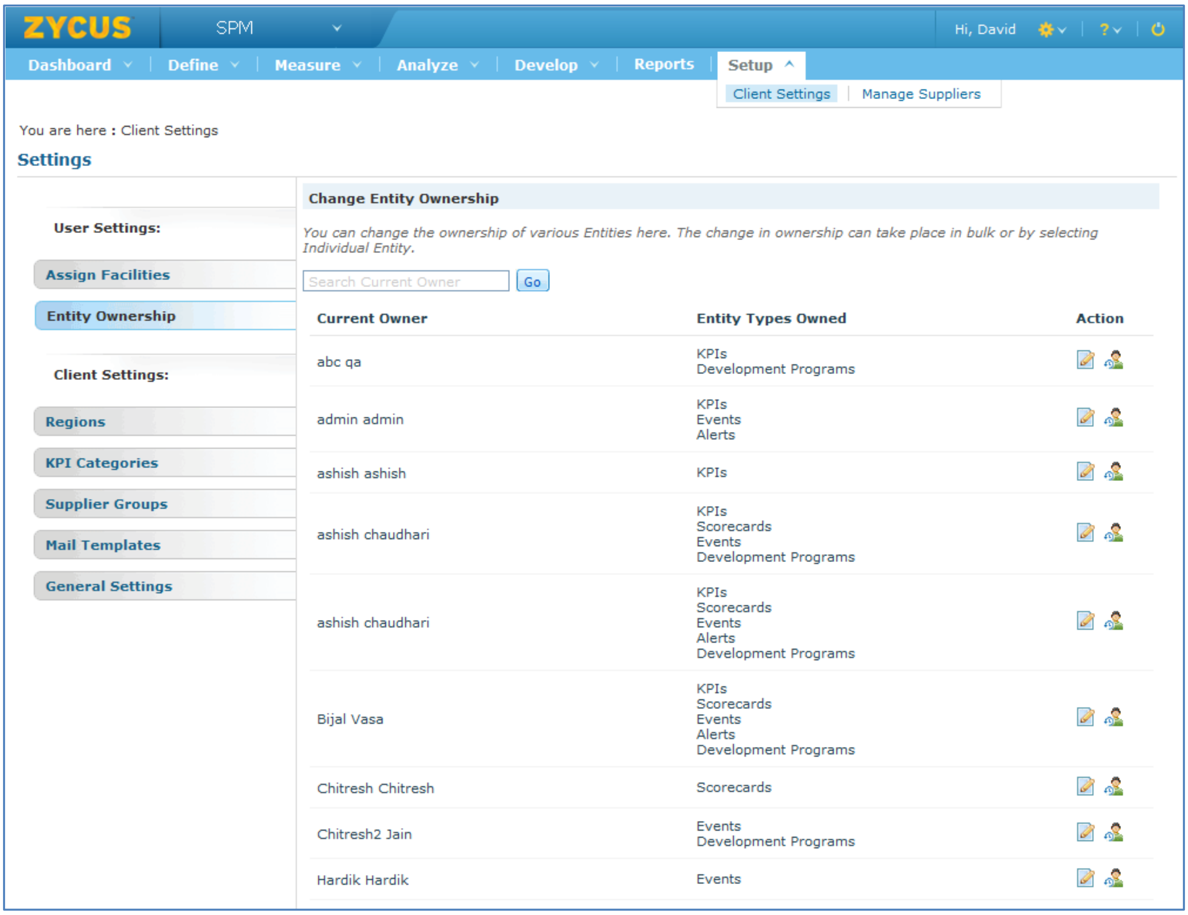
6. Select the facilities and click **Assign**. The facilities are assigned to that user.
7. Enter text in the search box and click **Go** to search users.

1.3.1.2 Entity Ownership

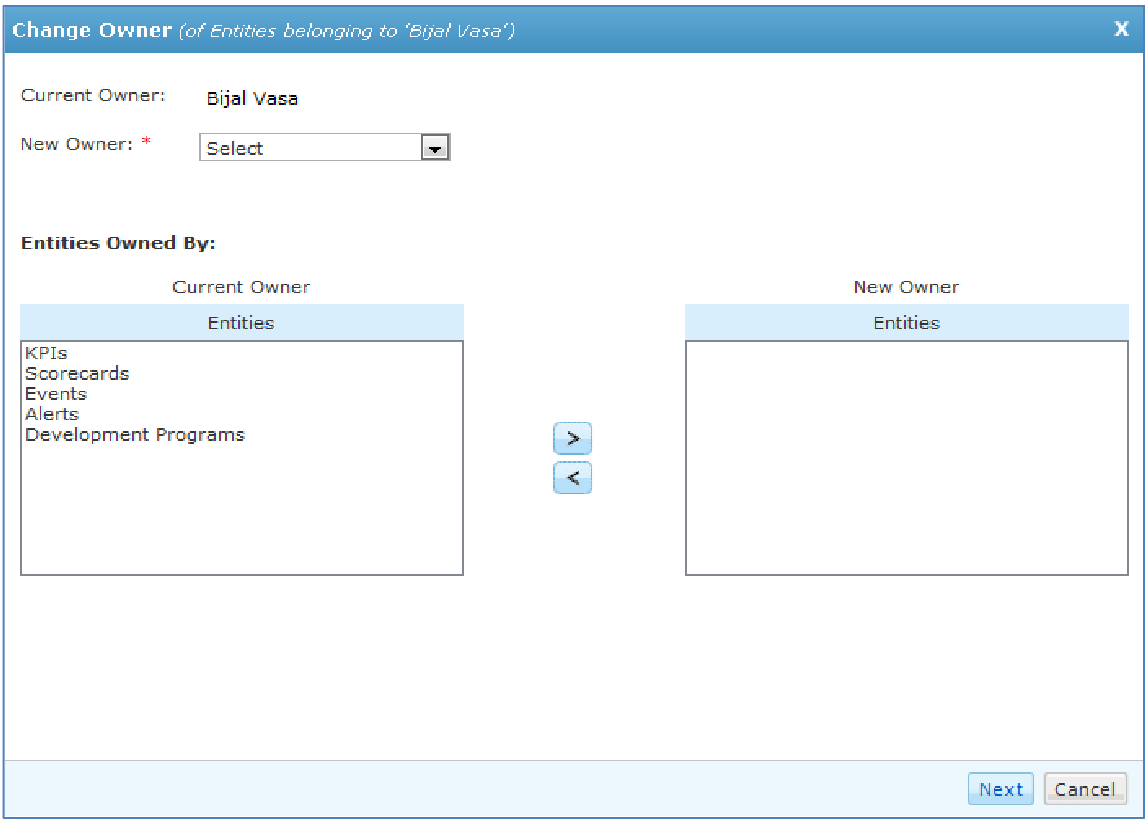
You can change the ownership of various types of entities present in the system. You can change the ownership of KPIs, Scorecards, Events, Development Programs and Alerts, from the current owner to a new owner. You can also view the previous owner to whom the entity was assigned.

To change the ownership:

1. On the left pane, under **User Settings** section, click on **Entity Ownership**



2. On **Entity Ownership** screen, click on (Edit) under **Action** section for the Current Owner whose entity needs to be transferred.

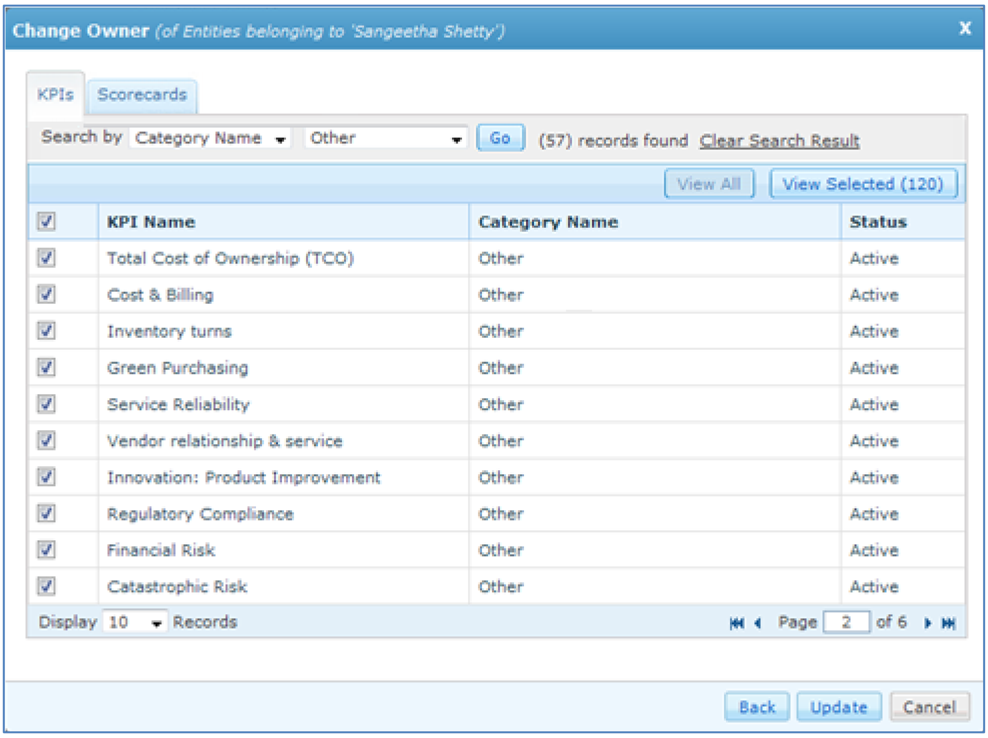


3. From the **New Owner** drop down menu, select the new owner on whose name the ownership needs to be transferred.
4. Select the entities to be transferred from the current owner to new owner and click on . The selected entities will be transferred to the corresponding **New Owner** section.

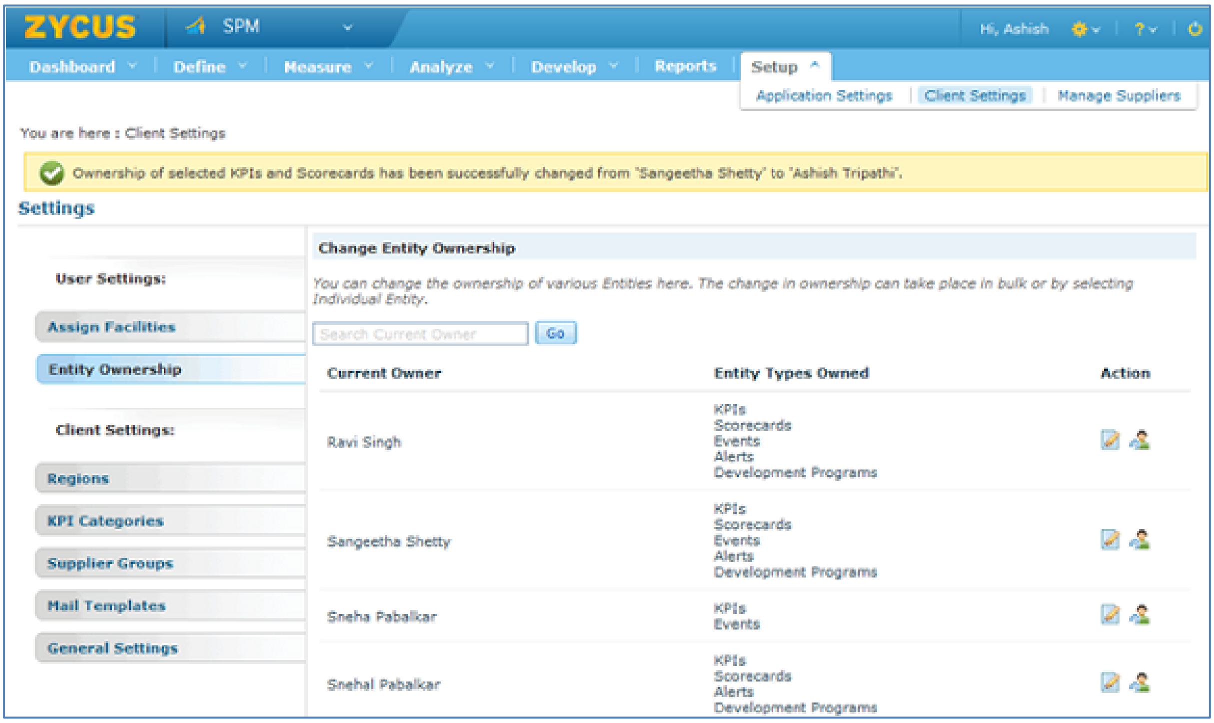
***Note:** You can select multiple entities by pressing the Ctrl button on the keyboard.*

***Note:** An entity can be transferred to the new owner only if the new owner has the appropriate rights to own such an entity.*

5. Click **Next**.



6. Select the particulars from each entity (KPI, Scorecard etc.) and then click on **Update** to transfer the ownership.

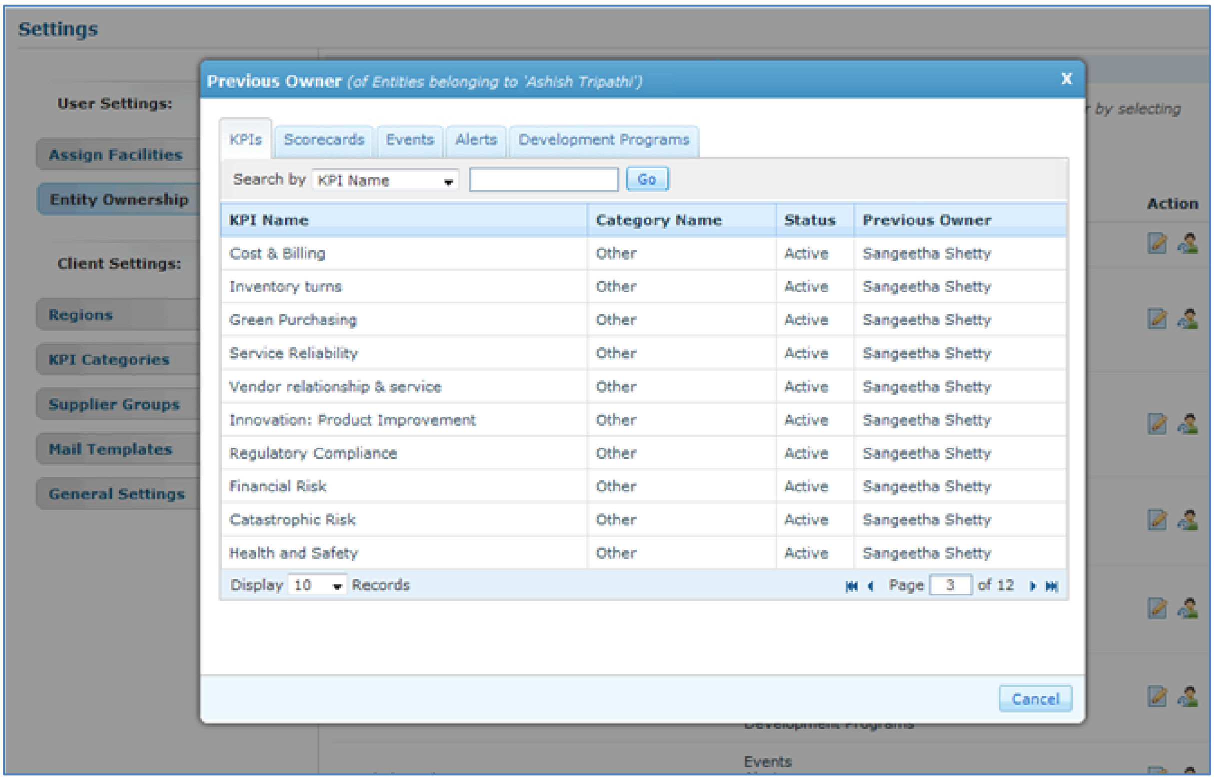


7. The system shows a confirmation message upon the successful ownership change.

Note: *Once the ownership is transferred, the corresponding mail communication would now take place with the new owner.*

To view previous owner:

1. On **Entity Ownership** screen, click on (Previous Owner) under **Action** section to view the previous owner of the entities for the corresponding **Current Owner**.



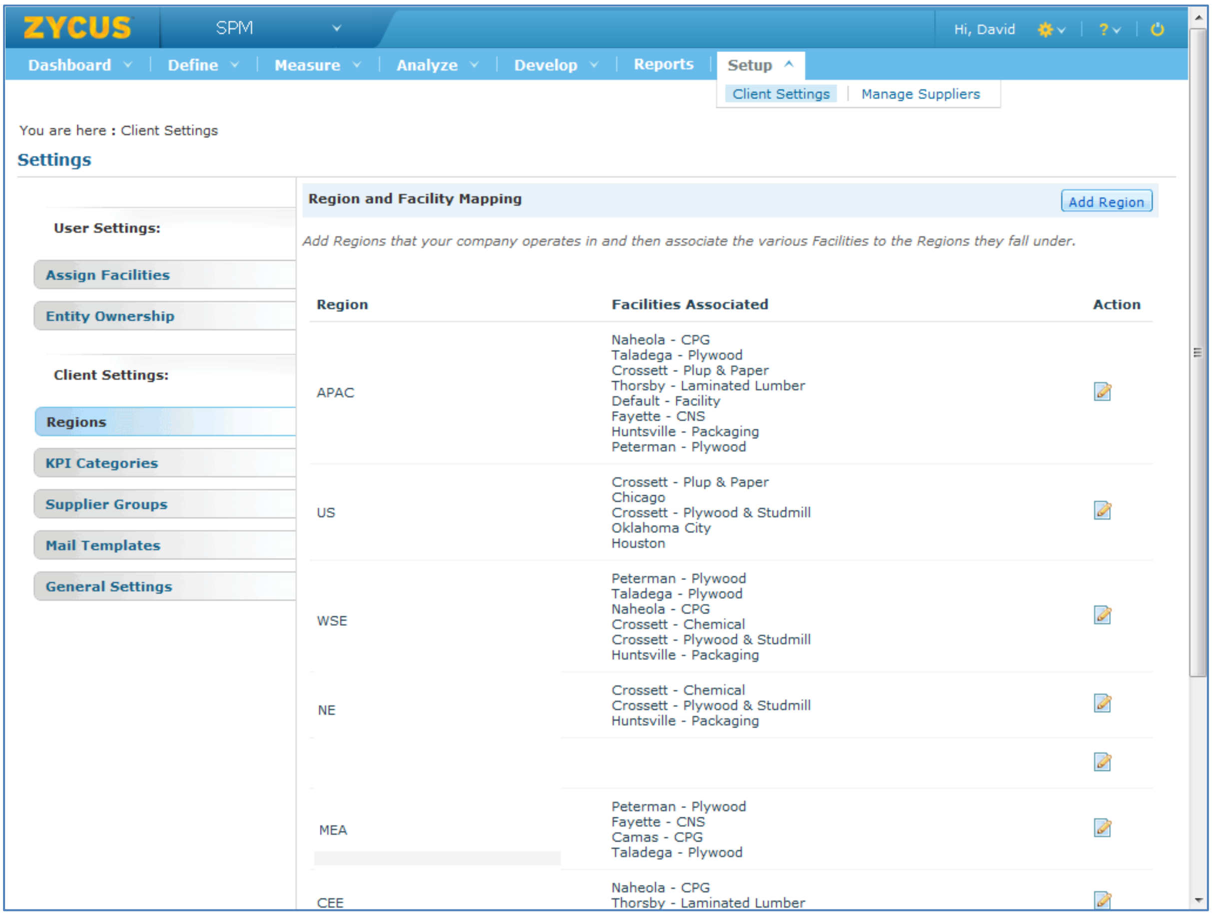
1.3.2 Client Settings

1.3.2.1 Adding Regions

You can add regions that your company operates in and then associate the various Facilities to the Regions they fall under. Each facility can be assigned to one or more regions. Just like the supplier performance can be viewed for different facilities, it can now be viewed per region as well.

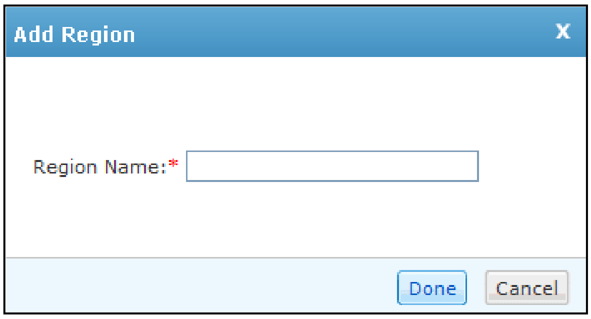
To add a region:

1. Click **Setup** tab.
2. Under **Setup** tab, click **Client Settings**.
3. On the left pane, under **Client Settings** section, click **Regions**.
4. Click **Add Region** tab on the upper right of the **Region and Facility Mapping** page.

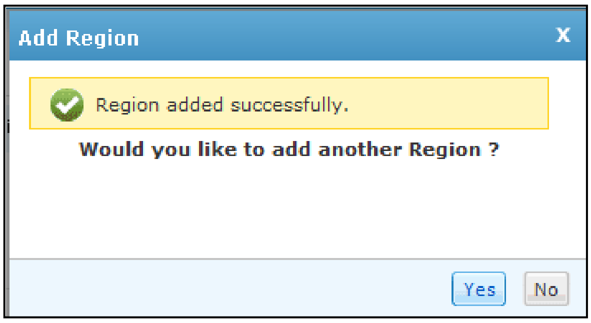


5. The **Add Region** dialog box is displayed.

Enter a name for the region



6. Enter the region name and click **Done**.
7. The following message is displayed.



8. Click **Yes** to add another region. The region is added and is displayed on the **Region and Facility Mapping** page.
9. Click  to assign facilities to the region.

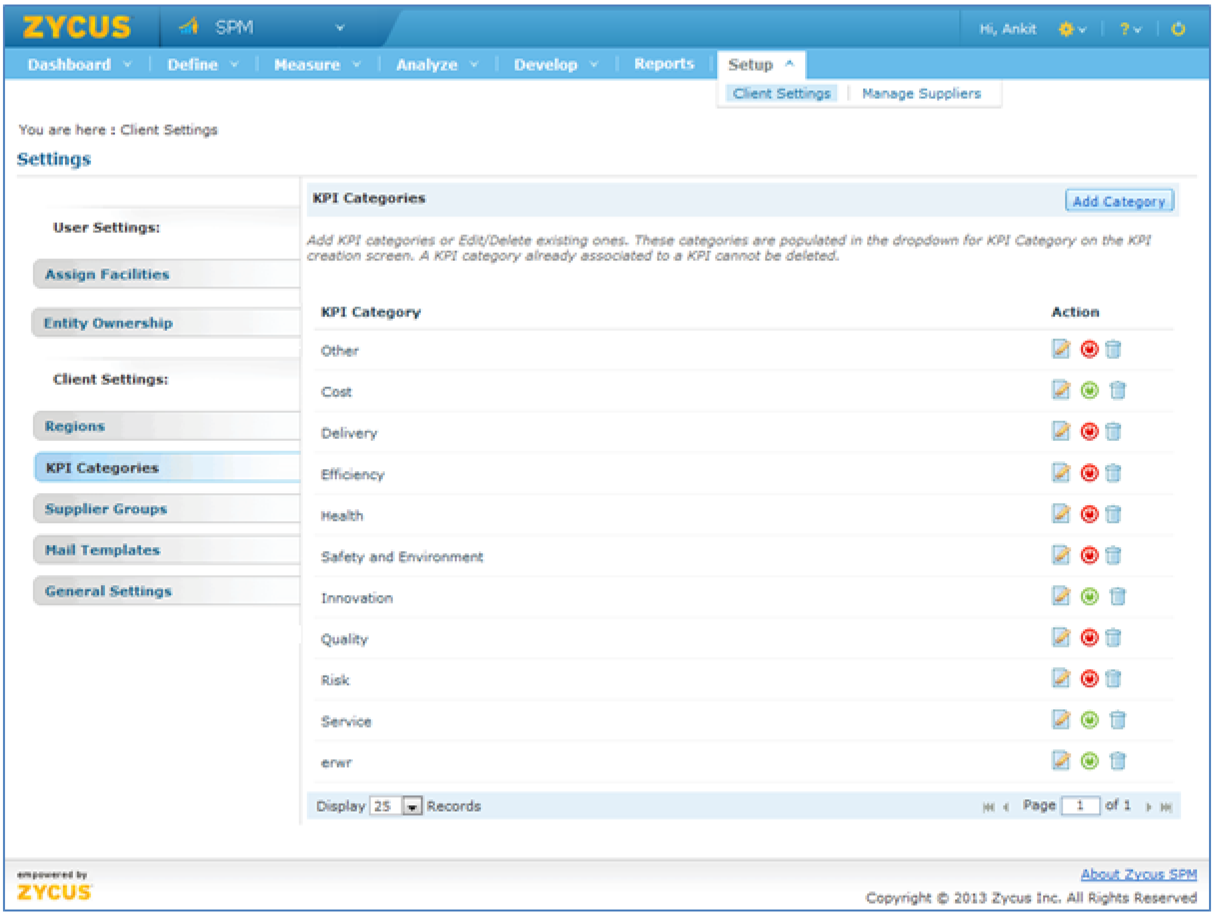
1.3.2.2 Adding/Editing KPI Categories

The KPI categories are populated in the drop down list for KPI Category on the KPI creation screen. A KPI category already associated to a KPI cannot be deleted. You can add KPI categories or Edit/Delete existing ones.

***Note:** You can deactivate KPI categories that you no longer need. These KPIs will be hidden from the KPI Category selection drop down on the first step of KPI creation. You can deactivate or re-activate a KPI at any time. The Active KPIs using the deactivated KPI will not be affected unless they are edited.*

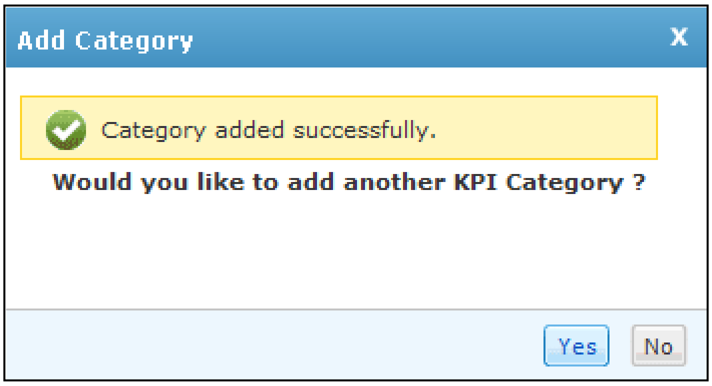
To add/edit KPI categories:

1. Click **Setup** tab.
2. Under **Setup** tab, click **Client Settings**.
3. On the left pane, under **Client Settings** section, click **KPI Categories**.
4. Click **Add Category** tab on the upper right of the **KPI Categories** page.



5. The **Add Category** dialog box is displayed.

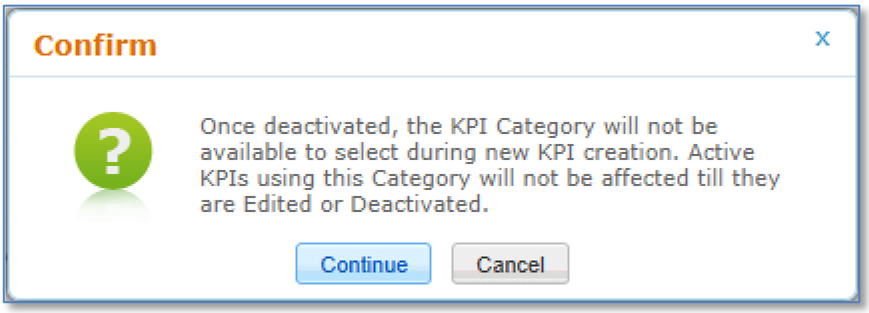
6. Click **Done**.
7. The following message is displayed.



8. Click **Yes** to add another category. The category is added and is displayed on the **KPI Categories** page.

9. Click to update a category.

10. Click to deactivate a category and to activate a category. On clicking the deactivate icon, the following message will be displayed.



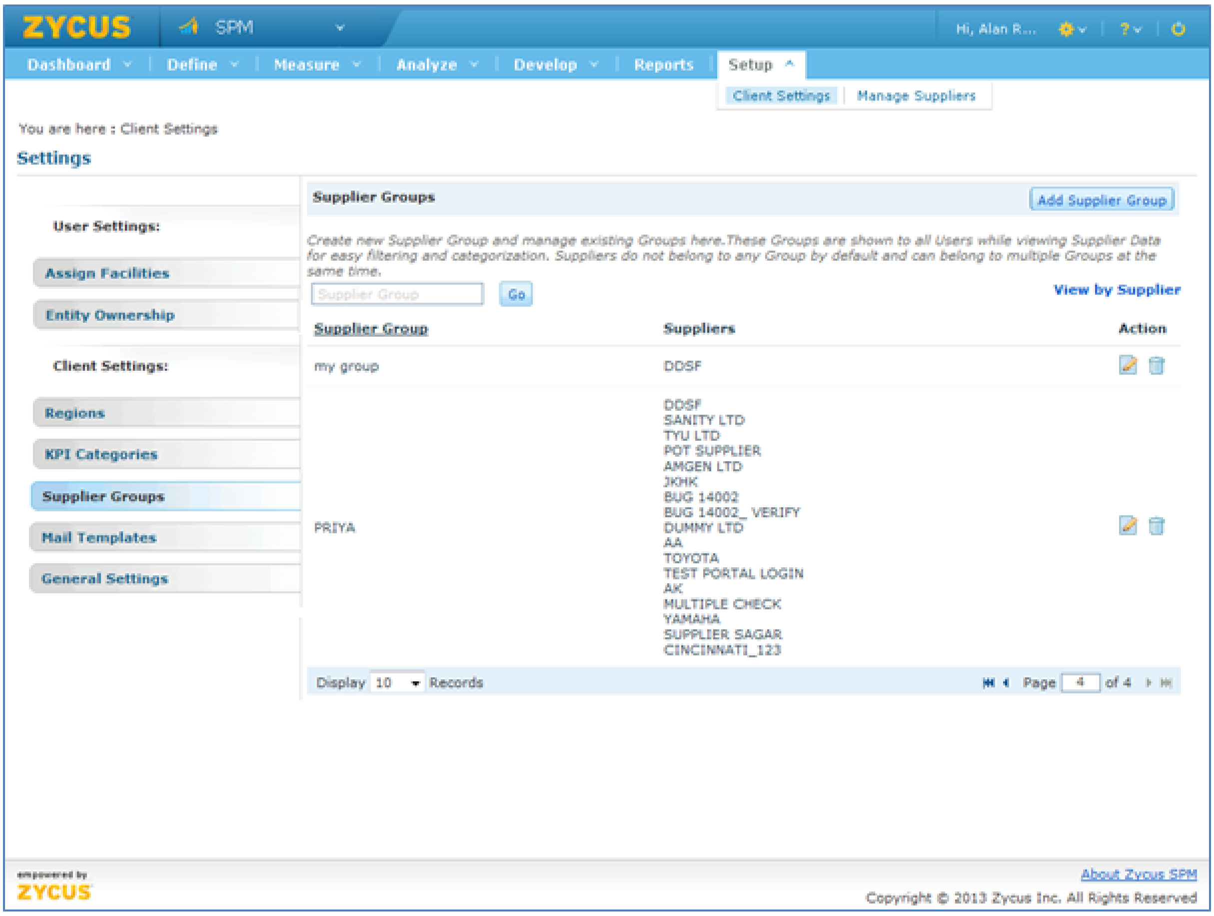
11. Click to delete a category.

1.3.2.3 Adding Supplier Groups

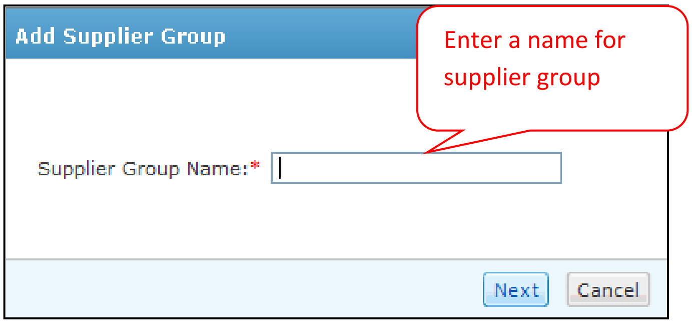
You can create and manage Supplier Groups. Each supplier can be associated with one or more Groups. Supplier data can be filtered and sorted by Groups when analyzing Supplier Information.

To assign facilities:

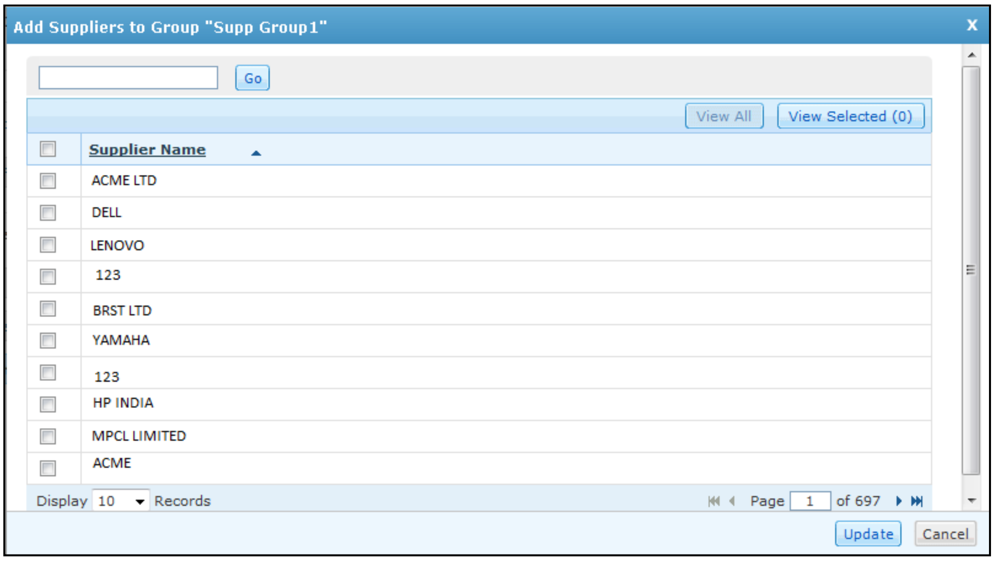
1. Click **Setup** tab.
2. Under **Setup** tab, click **Client Settings**.
3. On the left pane, under **Client Settings** section, click **Supplier Groups**. The following page is displayed.



4. Click **View by Supplier** to sort the display list by supplier names.
5. Click **Add Supplier Group**. The following **Add Supplier Group** dialog box is displayed.



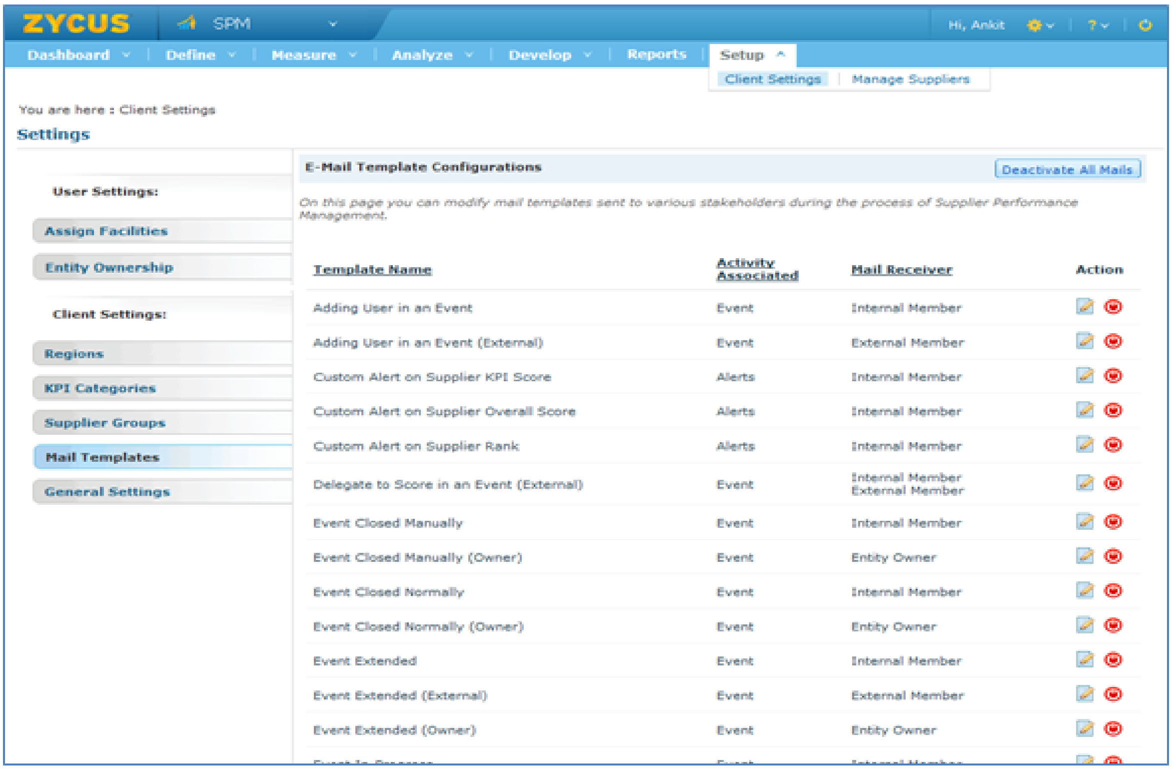
6. Click **Next**. The following **Adding Suppliers to Group** page is displayed.



7. Select the suppliers you wish to add to the group from the list.
8. Click **Update**. The supplier group is added and is displayed on the **Supplier Groups** page.
9. Click Edit to update a supplier group.
10. Click Delete to delete a supplier group.

1.3.2.4 Configuring Mail Templates

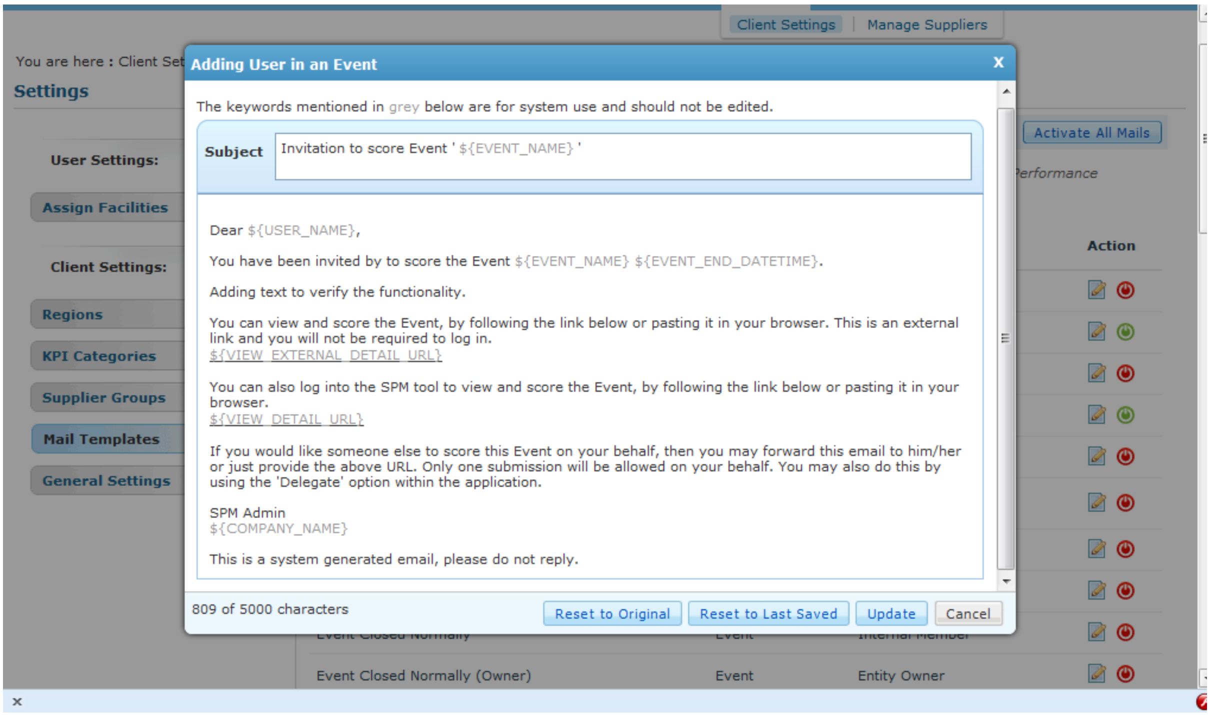
Under Mail Templates, you can modify the email templates sent to various stakeholders during the process of Supplier Performance Management.



You can edit the content of individual template at any point in time. You can also Activate or Deactivate emails sent by the system.

To edit a mail template:

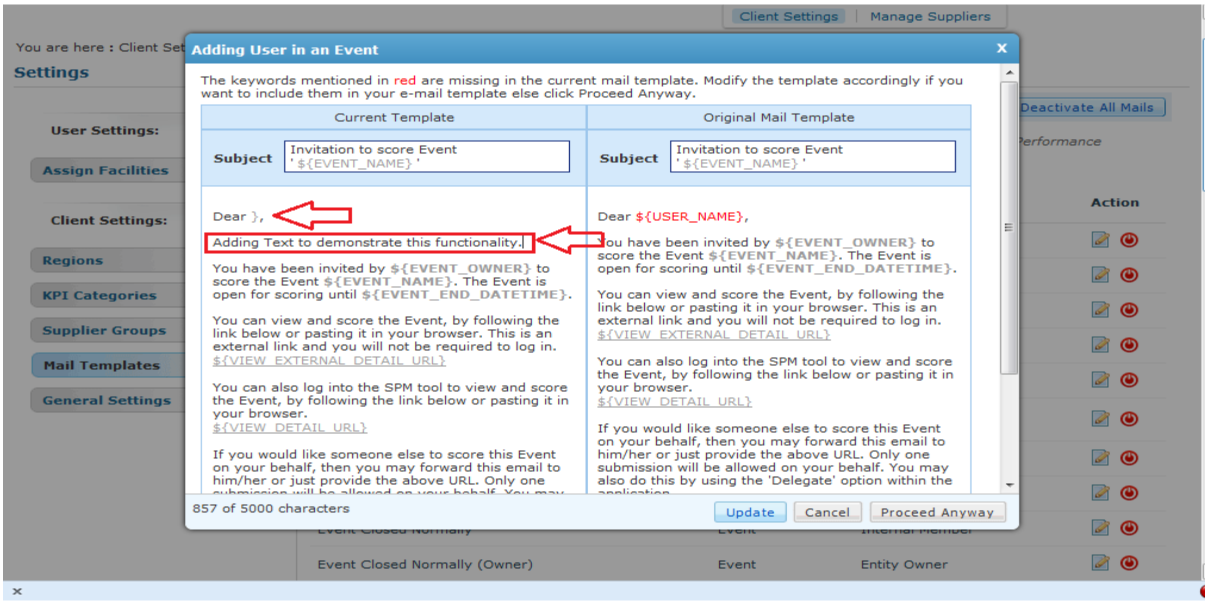
1. For a corresponding email template, under **Actions** section, click on . A popup is displayed.



In this popup, you will get to view the text of the template for the corresponding action.

2. Edit the text of template as required and click **Update**.
3. Click **Reset to Original** to reset the text of the template to the original state.
4. Click **Reset to Last Save** to reset the text of the template to the last saved state.

Note: *The mail template consists of a number of keywords which are necessary for system use. In case you modify any keyword and try to update the template, the system would check and highlight (in Red) the missing keywords in the mail template as shown below:*

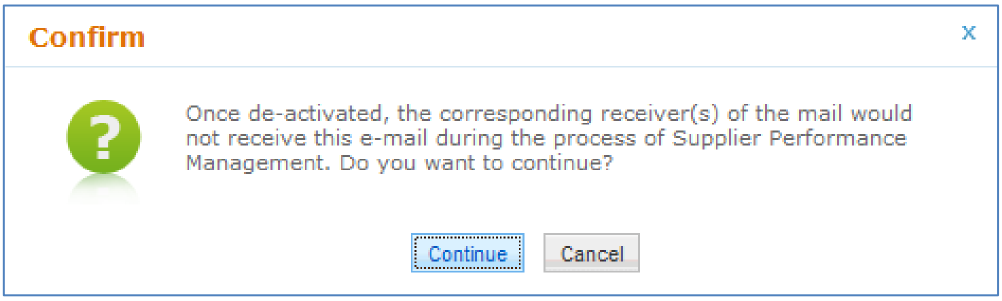


5. Click **Cancel** to cancel the update and go back to the **Mail Templates** listing screen.
6. Click **Proceed Anyway** to update the mail template with the missing keyword.

To Activate/Deactivate mail template:

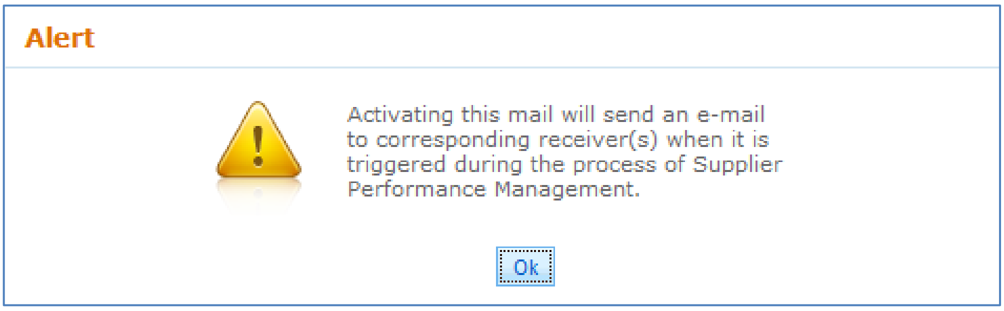
For a corresponding event, under Actions section, click on any of the following:

: Click this option to deactivate email for the corresponding event. Once you click this option the following message is displayed:



Click **Continue** to deactivate the email for the corresponding event.

: Click this option to activate email for the corresponding event. Once you click this option the following message is displayed:



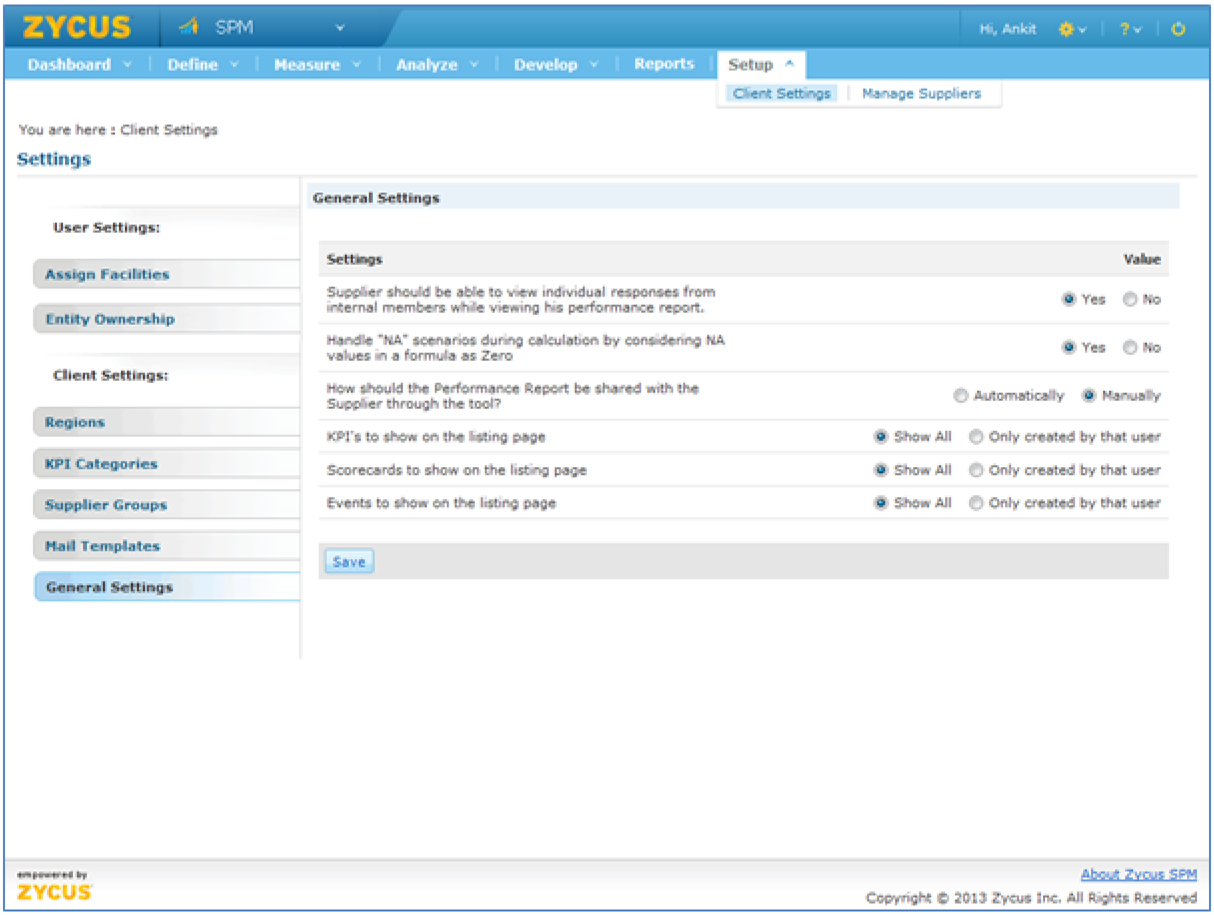
Click **Ok** to activate the email for the corresponding event.

1.3.2.5 Configuring General Settings

You can control whether on the Supplier Portal, the Supplier should be able to see individual responses from all respondents or only the basic Performance Report. This setting can be turned On or Off at any time by the Admin.

To configure general settings:

1. Click **Setup** tab.
2. Under **Setup** tab, click **Client Settings**.
3. On the left pane, under **Client Settings** section, click **General Settings**. The following page is displayed.



4. For **Supplier should be able to view individual responses from internal members while viewing his performance report**, select **Yes** to turn on the setting or select **No** to turn off the setting.
5. For **Handle NA scenarios during calculation by considering NA values in a formula as Zero**, select **Yes** to turn on the setting or select **No** to turn off the setting.

   In case the tool encounters a NA as a score while calculating scores, it will resolve it in the following manner.

   Sum: Ignore all NAs and take the sum of available values

Scenario 1: 24+16+NA = 40
Scenario 2: 0+0+NA = 0
Scenario 3: NA+NA+NA = NA (But will be taken as 0 if it is a KPI score which will be used in Scorecard formula)

Average: Ignore all NAs and take the average, by also reducing the denominator.

If there are 5 questions and 1 is NA then KPI value would be Q1+Q2+Q3+Q4/4. Behavior will be same for the Scorecard formula as well.

Custom: This will remain NA as we cannot assume values to be Zero in case of a custom formula.

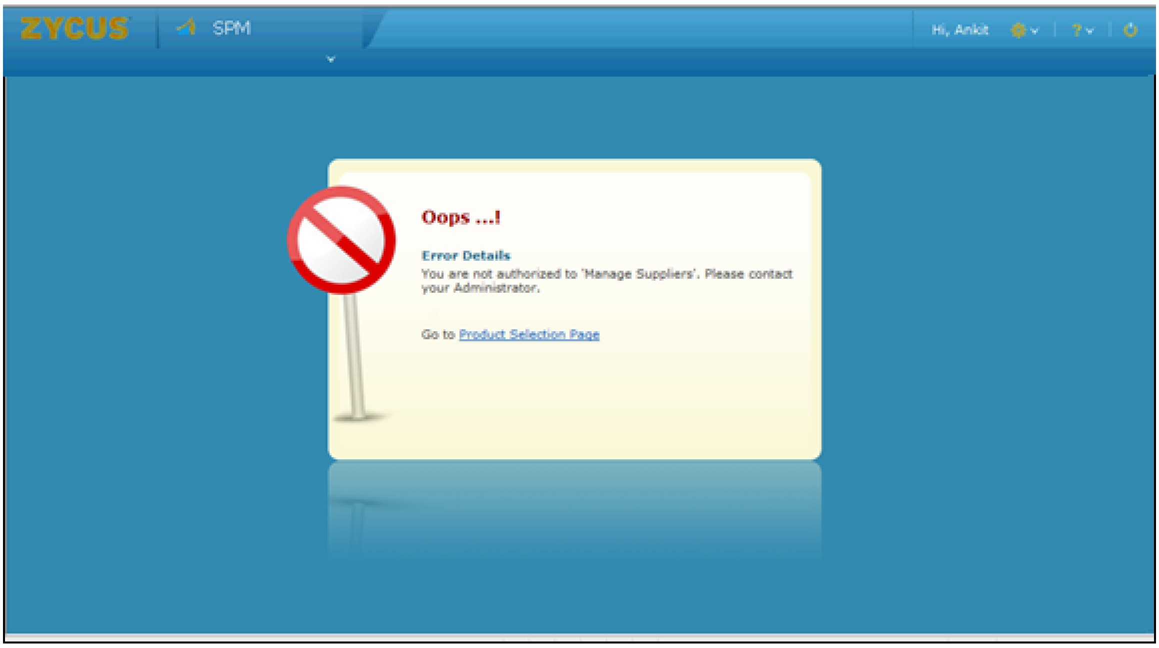
6. For **How should the Performance Report be shared with the Supplier through the tool,** select **Manually** to allow the users to manually share the report OR select **Automatically** to let the tool automatically share the report with the users once the event gets closed.

Note: *You will be able to switch between the original behavior of the tool or the new behavior. On switching to the original behavior, when the tool encounters a NA in the formula, the final score would be NA.*

1.4 Managing Suppliers

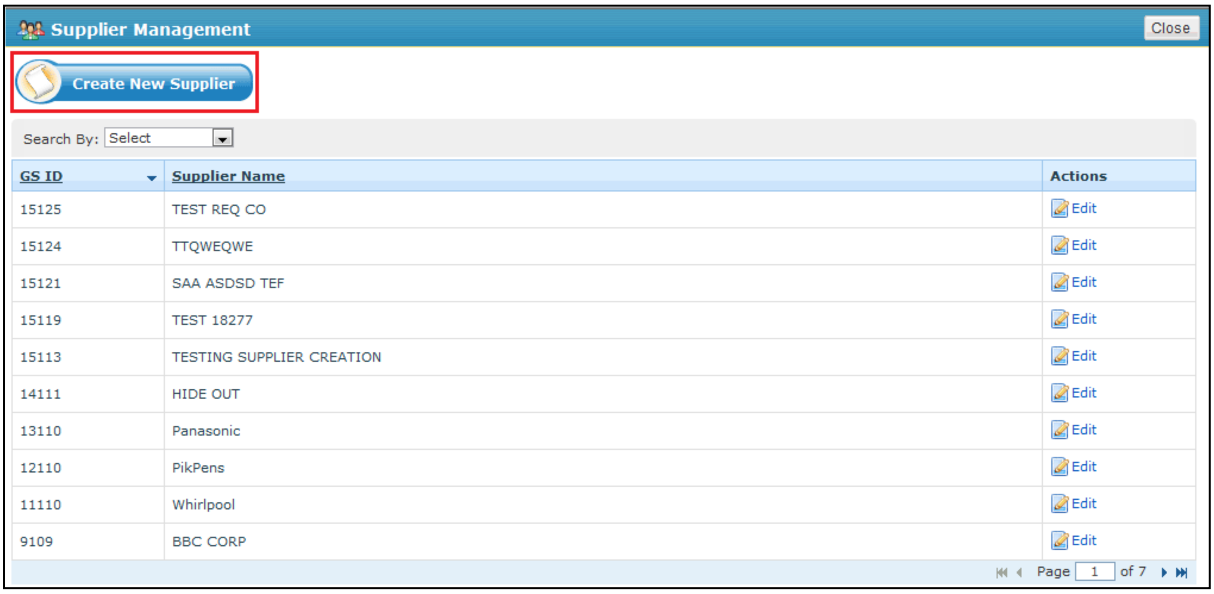
The **Manage Suppliers** sub-tab lets you create new suppliers and submit the supplier creation requests for approval.

Note: *User must be authorized to manage suppliers. The following error message is displayed if not authorized.*

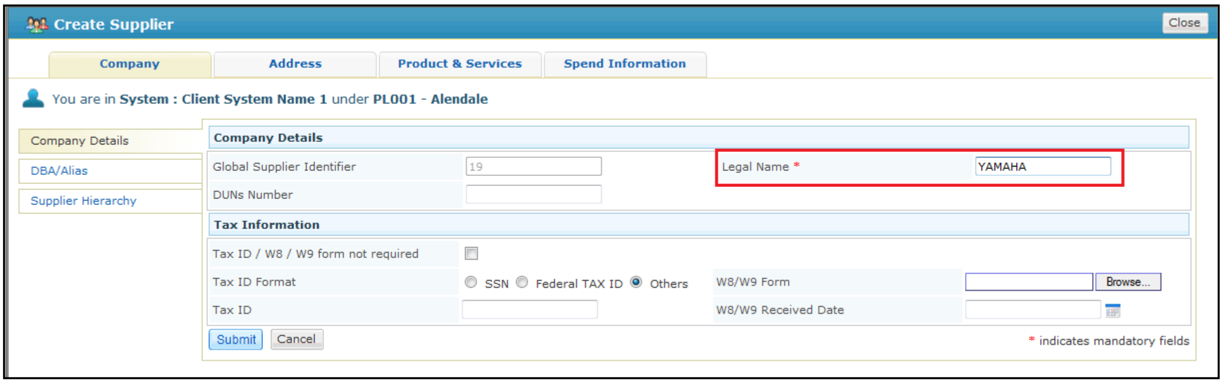


To manage suppliers:

1. Under **Setup** tab, click **Manage Suppliers** sub-tab. The **Supplier Management** page is displayed.



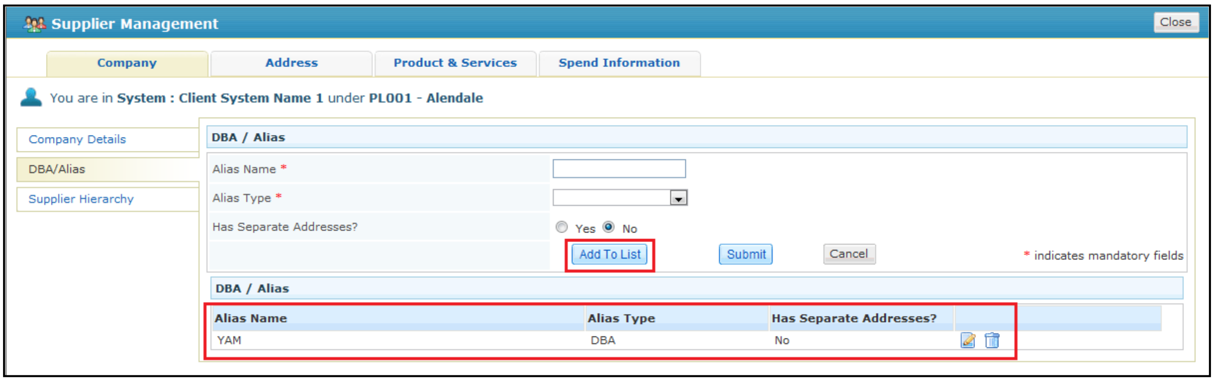
2. Click **Create New Supplier**. The following **Create Supplier** screen is displayed.



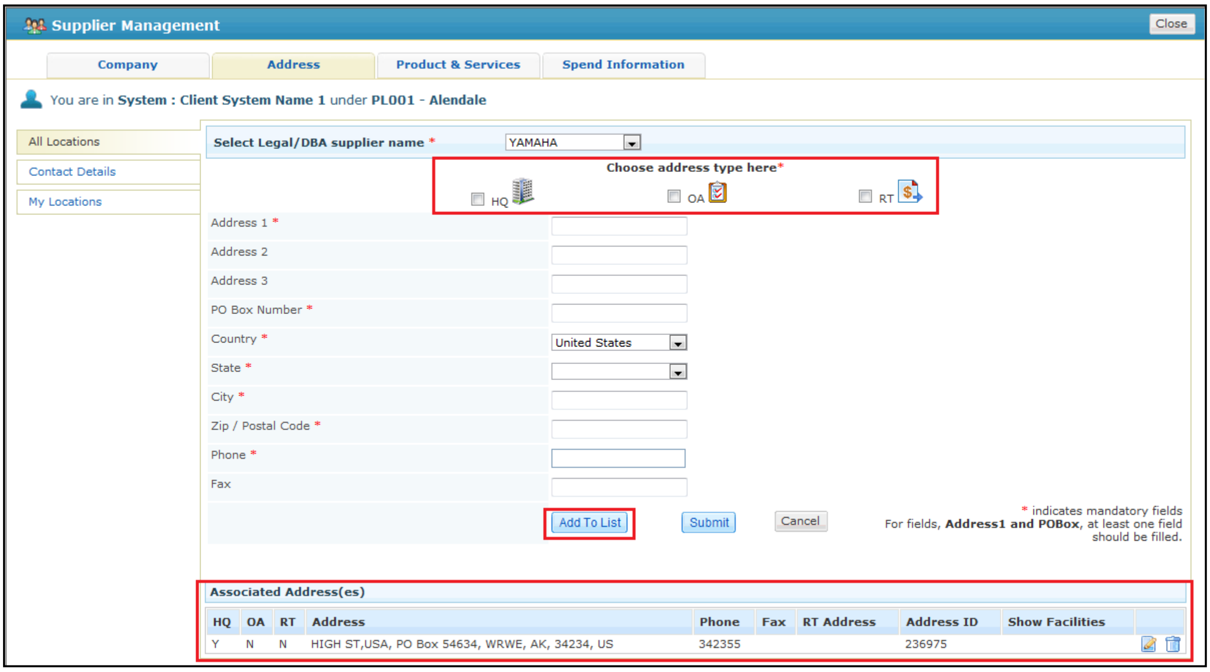
3. Enter the required details. Under **Company Details**, **Legal Name** is a mandatory field.

Note: *Each supplier has a unique Tax ID. If you enter the Tax ID in this screen, ensure it is the correct Tax ID which does not conflict with any of the prior created supplier Tax IDs. No two suppliers can be created with the same Tax ID. If that is the case, an error message will be shown as displayed.*

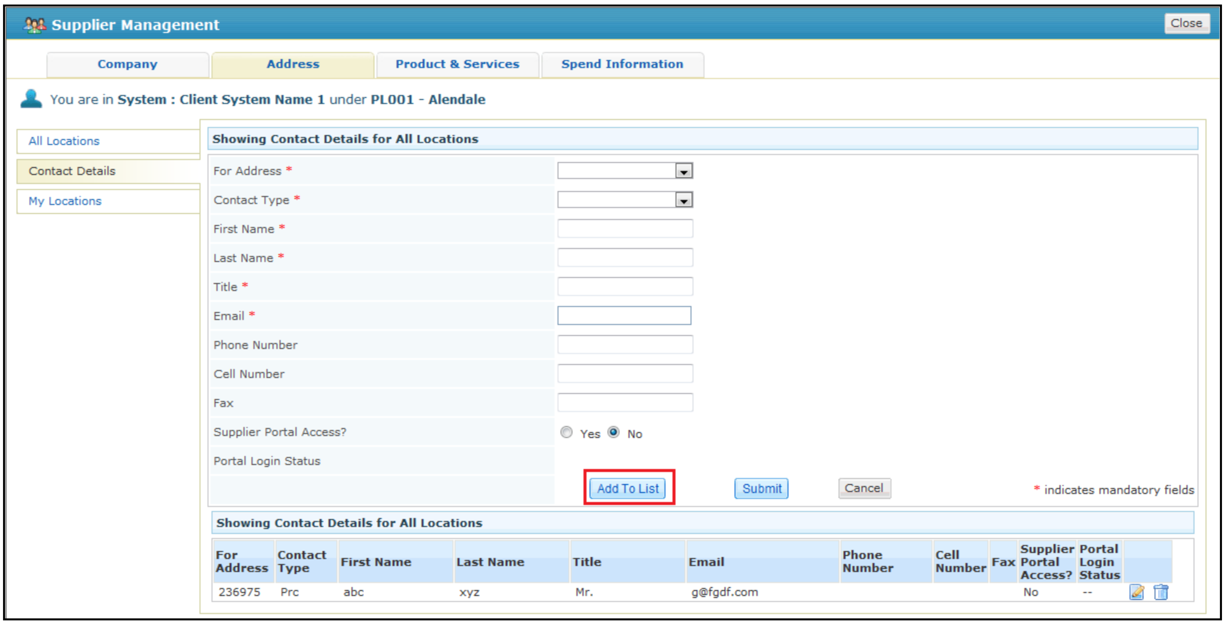
4. Ensure you have entered the **Legal Name** and click **DBA/Alias** sub-tab. The following page is displayed.



5. DBS/Alias **section is NON mandatory**. If you do need to add an Alias, only then the fields marked with Red asterisk are mandatory.
6. Fill the mandatory fields and click **Add To List**. The supplier is added and is displayed below.
7. Click **Address** tab. The **All Locations** is displayed.



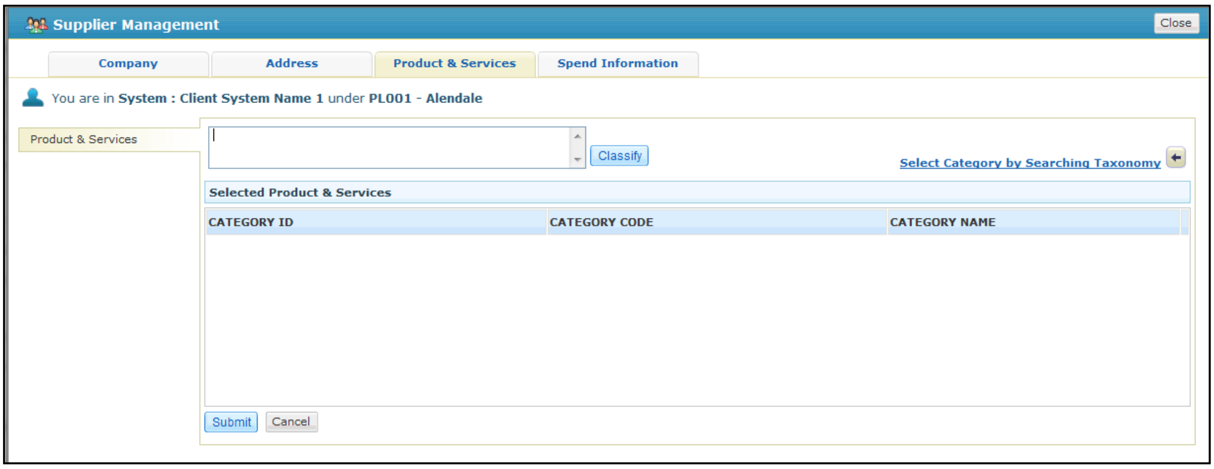
8. Choose an address type and fill all the mandatory details. Click **Add To List**.
9. The address is added and is displayed on the list below.
10. Click **Contact Details** sub-tab. The following page is displayed.



11. Enter the mandatory fields and click **Add To List**. The details get added and are displayed on the list.

Note: *For Supplier creation, filling information under* ***Company*** *and* ***Address*** *tabs is mandatory.*

12. Click **Product & Services** tab. The following page is displayed.

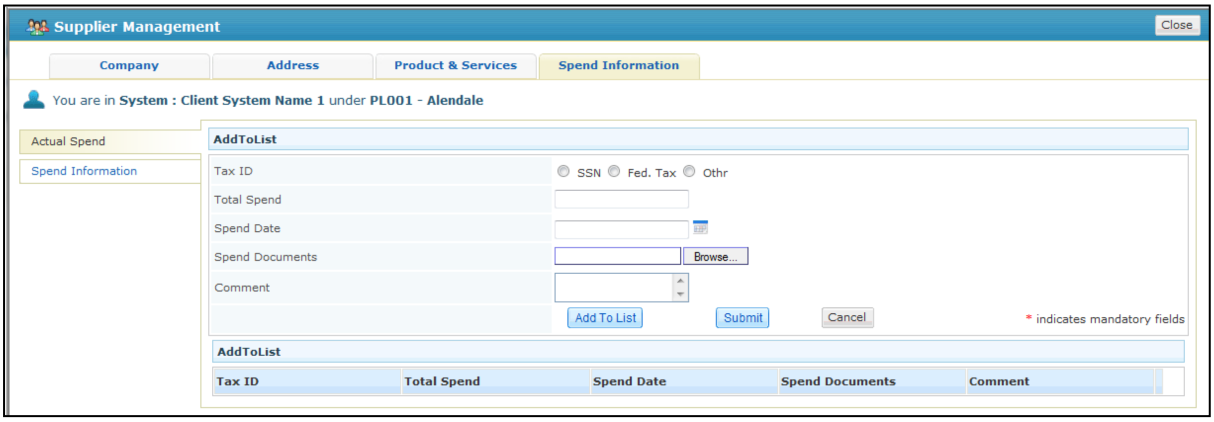


Note: Filling Spend Information is not mandatory for supplier creation. However, if you start filling, fill all the mandatory fields.

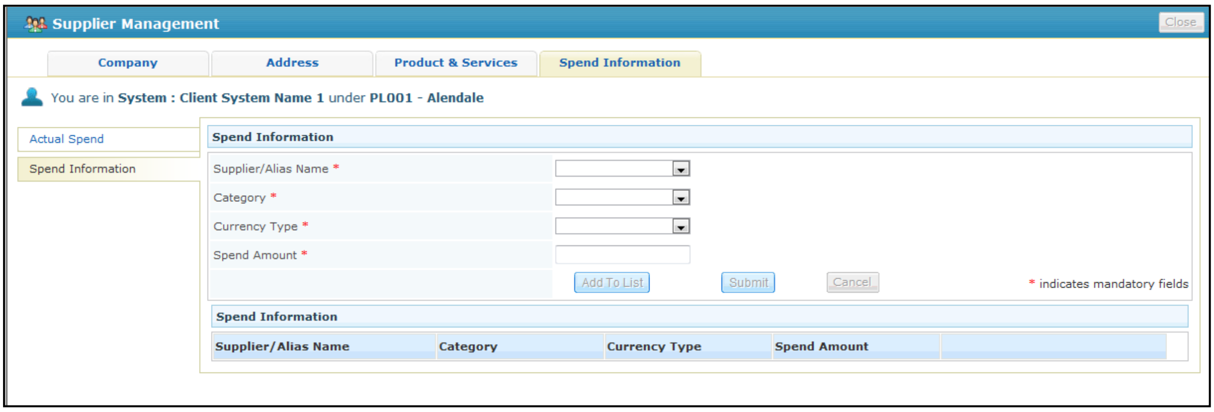
13. Enter a product description and click **Classify**.

14. Click **Spend Information**. The following page is displayed.

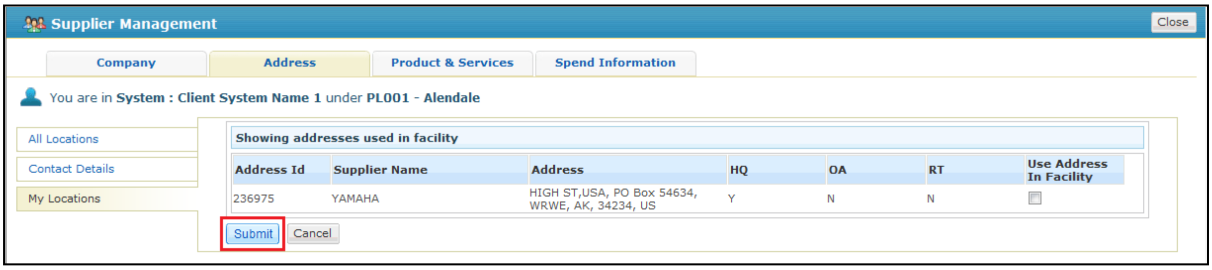
Note: Filling Spend Information is not mandatory for supplier creation. However, if you start filling, fill all the mandatory fields.



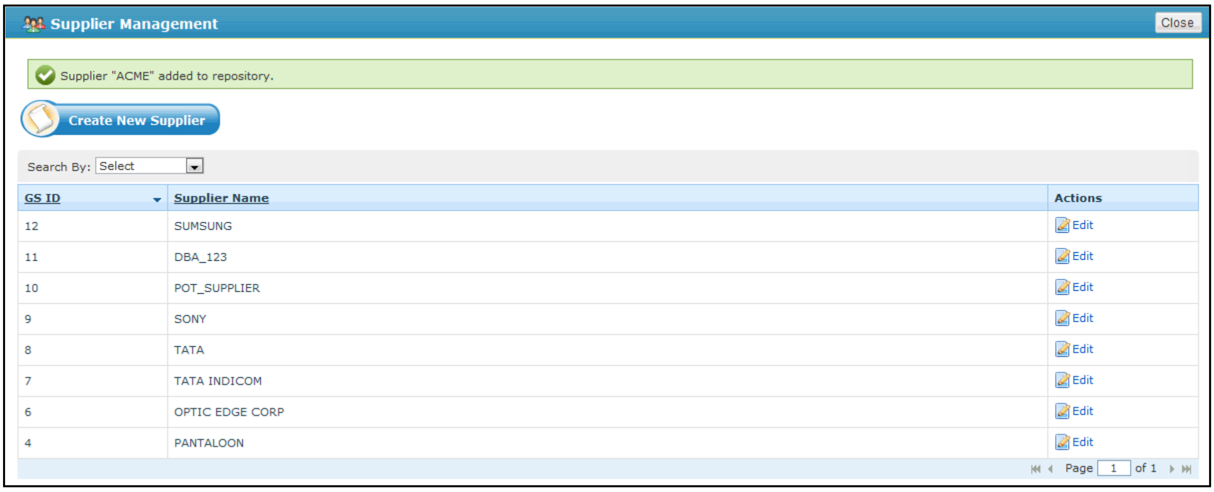
15. Enter the details and click **Add To List**.
16. Click **Spend Information** sub-tab. The following page is displayed.



17. Click **Address** tab. Select **My Locations** sub-tab. The following page is displayed.



18. Click **Submit**. The supplier is added and is displayed on the **Supplier Management** screen.



19. Select **GS ID** or **Supplier Name** from the **Search By** drop down list to search a supplier.

20. Click Edit corresponding to the supplier you wish to edit the details of.