

Catalytics Supplier User Guide

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Document control

Each author or editor must update the table below. Versioning allows all users to see the progress of the document and who to speak to if there are issues. Make sure you use the versioning table so all our documents follows our ISO 27001 compliant processes.

Version	Date	Created/Updated by	Draft/Final	Comments/Changes
1	01/09/17	Lesley Bowden	Final	
2				
3				

Confidentiality classification

All documents fall into one of these categories; delete as appropriate:

Classification	Storage	Transport	Destruction
<p>Unclassified: information which has not been classified to any categories below</p> <p>NB: Contractual confidentiality applies.</p>	Level 3 - must be stored in secure folder structure accessible by authorised personnel only	Level 3 - some confidential information. Can be transported electronically by email or FTP. Physical transportation must be on encrypted media or storage device	Level 2 - some confidential information. Document should be disposed of in confidential bins

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1. Glossary

Within the SRM module there are symbols that appear that complete different actions.

Symbol	Explanation
	View
	Edit

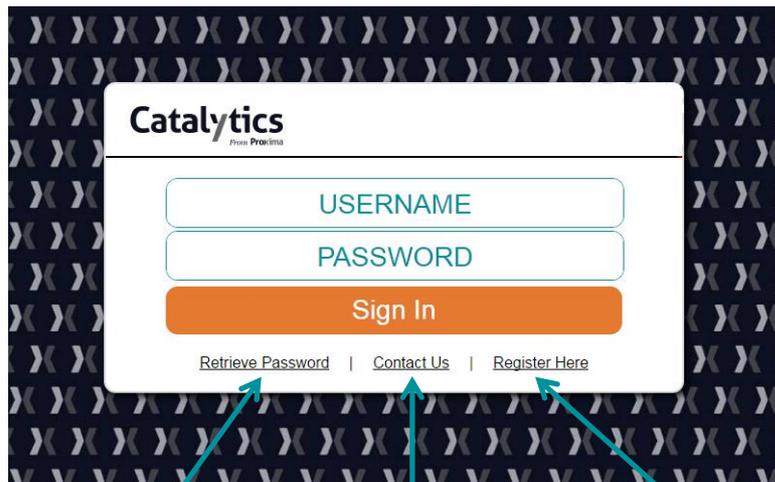
Terminology	Definition
Actions	These form part of the meetings, when a meeting has taken place and tasks have been agreed you can then set them up as Actions which are set up against the individual who will be completing the task. This will also appear in the widget within the dashboard named Actions
Client Internal Relationship Manager	Manages the day to day relationship with the supplier
Dashboard	This is the main page that you will be directed to when you login to the SRM module, it contains a view of all the widgets and quick links you have chosen
Objectives	This is added to the meeting to set out the objectives for the session
Quick Links	These are buttons that you can have visible within your dashboard, the ones you would like visible are chosen in the Modify Dashboard link where you can choose which ones from a list. You click on these buttons on your dashboard and it will take you directly to that part of the system
Repository	In the Catalytics SRM module, you have the ability to add documents directly into the repository (a repository request) for review by the Client Internal Relationship Manager. It also allows you to view documents that the client has uploaded
Supplier Relationship Manager	Manage day to day relationship with the client
Supplier Registration Form (SRF)	This is the questionnaire that is sent to the supplier once they have been set up within Catalytics and forms part of the on-boarding process
Widgets	These display information on your dashboard, you can choose which ones you would like to view in the Modify Dashboard option

2. Setting Up

2.1 System Login

This is the login page that will load when you use the Catalytics URL provided. You will create your account within this part of the system and also access your login credentials once you have been set-up within Catalytics.

When you click the link it will direct you to the login page, there are also some additional features that are available within this screen:-



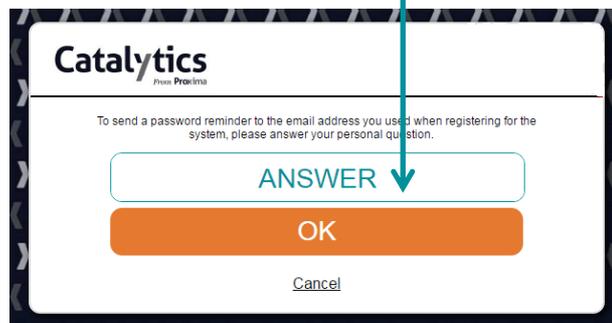
If you forget your password you can click think link to send the password to your email account

This link can be used to obtain the contact details for suppliers if support is needed

This link is for any new or potential suppliers to register

2.2 Retrieve Password

When you have selected Retrieve Password this is the screen that will appear. For the system to email your password please add your email address here then press OK. The system will then send you an email containing your password.



2.1 Changing Your Password

At any point you can change their password, to do this select Change Password under Home which will load the following page.

The screenshot shows a 'Change of Password' form. At the top, it lists password requirements: 'Maximum number of repeated characters: 3; Minimum length: 6; History restriction length: 12'. Below this, it states 'All of the following:' followed by 'Minimum number of letters: 2; Minimum number of lowercase letters: 1; Minimum number of uppercase letters: 1; Minimum number of numbers: 1; Minimum number of punctuation characters: 1'. The form itself has a title bar 'Change of Password' and a pre-filled 'User Name: anita.hatherall@proximagroup.com'. There are three input fields: 'Current Password:', 'New Password:', and 'New Password Again:'. At the bottom right of the form are two buttons: 'OK' and 'Cancel'.

Once the new password has been created press save, this will overwrite the current password and will be required the next time the user logs into the application.

2.3 Contact Us

Below is the contact form that is generated from clicking on the Contact Us link within Sourcing.

The Contact Form is used for internal business users.

The screenshot shows a contact form. At the top, it says 'For all business users and suppliers, please contact:' followed by 'Email: acme@xxxxx.com' and 'Tel: 0123 4567891'. Below this, it says 'Supplier Relationship Managers with queries relating to 'how to' guidance and technical issues, please use the contact form below or contact:' followed by 'Email: catalytics.support@proximagroup.com'. The form is titled 'Contact Form' and has a sub-header 'If you need to contact us please fill in the form below.'. There are several input fields: 'Name' (with 'Lesley-ann Bowden' entered), 'User Name', 'Email' (with 'lesley-ann.bowden@proxi' entered), 'Telephone', and 'Fax'. To the right of these fields is a 'Tender Name (if applicable)' field and a large 'Comments' text area. At the bottom right of the form is a 'Send Feedback' button. There are also small circular icons with a double-headed arrow next to the Email, Telephone, and Fax fields, and a small double-headed arrow icon below the Fax field.

2.4 Registration

When using Catalytics for the first time you will need to complete the self-registration form, this form requires some information regarding your organization along with the creation of your user login details.

Once this has been completed simply click register, you will then receive an email to notify you that the account has been created.

The registration form includes the following sections and fields:

- Personal Details:** Title, First Name, Surname, Job Title, Phone, Mobile, Fax.
- Company Registered Details:** Company, Company Reg No, Address 1, Address 2, Town, County, Country (dropdown), Post Code, Tax Registration (dropdown with a 'Remove' button), Website Address.
- Categories You Supply:** A search box labeled 'Find Categories' and an 'Add Category' button.
- Login Details:** Email Address (noted as the username), Password, Password Confirmation. Below these fields are password requirements: 'Maximum number of repeated characters: 3; Minimum length: 8; History restriction length: 12. All of the following: Minimum number of letters: 2; Minimum number of lowercase letters: 1; Minimum number of uppercase letters: 1; Minimum number of numbers: 1; Minimum number of punctuation characters: 1'.

At the bottom left, there are 'Register' and 'Cancel' buttons.

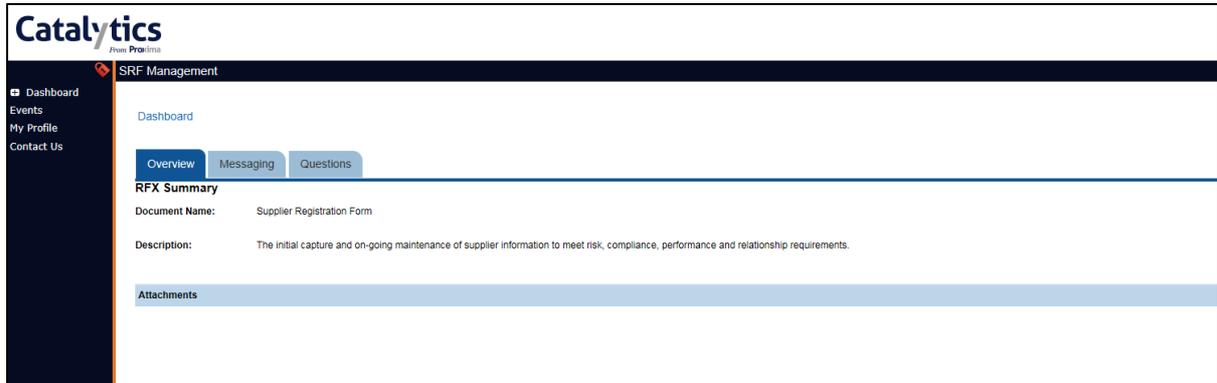
2.5 Supplier Registration Form (SRF)

As part of the on-boarding process you will be required to complete the Supplier Registration Form, an email will be sent to you to advise when this needs completing.

Once within the Sourcing page select Supplier Registration Form under the Events Summary Widget, you can select it by clicking on the name of the event.

Title	Event Type	Closing Date
Supplier Registration Form	SRF	01 January 2030 12:00

When the system has loaded the Supplier Registration Form you will have the view as below.

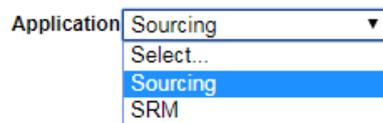
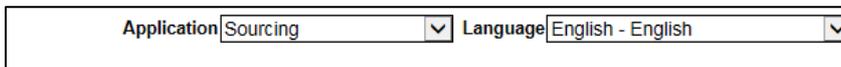


The overview will provide a brief description of the document, there is a message board available which you can use to contact the client and the client can contact you. The content of the questionnaire is within the Questions tab.

3. SRM Module

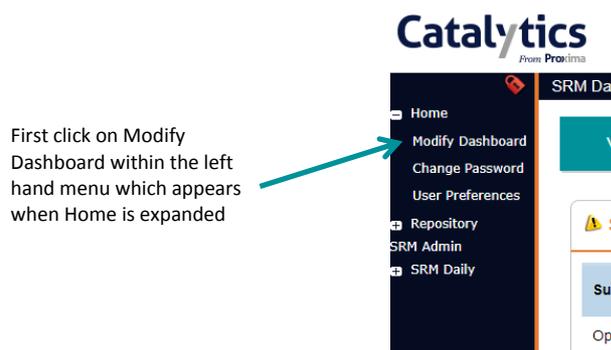
3.1 SRM Dashboard

To view the SRM module please use the dropdown menu that appears top right-hand side of the page and change it to SRM.



When you first login into the Catalytics portal the dashboard screen for the SRM module will be blank. The reason for this is that you can choose which widgets and quick links you would like to view within your dashboard. Once you have chosen the widgets you would like to view you can also change the sequence that they appear.

To choose which widgets you would like to view within your dashboard you need to complete the following steps.



First click on Modify Dashboard within the left hand menu which appears when Home is expanded

This will then load the page where all of the Quick links and Widgets can be chosen, you can select which ones you would like to appear by clicking on the tick box which appears against the name of the option. Once you have selected the options you would like available please click on Save Changes.

Save changes

Select Quicklinks
Select select the quicklink buttons to display on your dashboard.

Repository Quicklinks Select

- View Repository ✓
- Manage Repository Data Requests ✓

SRM Daily Quicklinks Select

- Manage Questionnaire Responses ✓
- Manage Meeting Actions ✓

Select Widgets
Select modules to add to your dashboard from the selection below.

KPI Select

- Actions ✓
- Meetings ✓
- Pending Responses ✓
- Supplier Meetings ✓

Save changes

3.1.1 Actions Widget

This widget is driven by the actions that are held within a meeting that has either been scheduled to take place or concluded within the system, it shows any actions that have a deadline date within the current week and have been assigned to you.

⚠ Actions ▲ ✕		
Details	Status	Due Date
Go through all of the points that were identified within the meeting	In Progress	01/09/2017

3.1.2 Meetings Widget

This widget shows any meetings that are coming up during that week that you are an attendee for.

⚠ Meetings ▲ ✕		
Subject	Location	Start
Operational Review	Not set	01/09/2017 12:00

3.1.3 Supplier Meetings Widget

This widget shows all of the meetings that are upcoming over the next rolling month, it highlights in red any meetings where the date has lapsed and the meeting hasn't been updated by the Client Internal Relationship Manager.

Supplier Meetings			
Subject	Supplier Name	Owner	Start
Operational Review	Bupa	Lesley-ann Bowden	19/05/2017 12:00
Demand and Spend Management Review	Bupa	Lesley-ann Bowden	19/05/2017 12:00
Demand and Spend Management Review	Bupa	Lesley-ann Bowden	20/06/2017 12:00
Operational Review	Bupa	Lesley-ann Bowden	01/09/2017 12:00

3.1.4 Pending Responses

This widget shows the number of pending responses you have for Questionnaires and Repository Data Requests.

Pending Responses	
Header	Total
Questionnaire Responses	1
Repository Data Requests Pending	2

3.1.5 Quick Links

When you have selected which quick links you would like available within Modify Dashboard they will become visible at the top of your dashboard, to use the quick link simply click on the link you would like to view and it will load the page.

View Repository

Manage Repository Data Requests

Manage Questionnaire Responses

Manage Meeting Actions

3.2 Responding to a Questionnaire

When a questionnaire is dispatched an email will be sent to advise you, it will state the name of the questionnaire along with the deadline date for the response. The email will also contain a link that will allow you to click on to be taken directly to the Catalytics login page. Once logged in you will be directed to the pending questionnaire.

You can also view of the pending responses in the Manage Questionnaire Responses which appears in the left hand menu and is also available as a quick link.

The date the response needs to be received by

The date the questionnaire was dispatched

Name of the questionnaire

The description of the questionnaire

Manage Questionnaire Responses

Questionnaire responses which are pending your completion are shown below.

Name	Description	Deadline	Created
Voice of the Supplier v01 20170504	A review of your companies relationship with the client, in…	04/08/2017	28/07/2017

Respond

Click here to view the questionnaire and to respond

This is to submit your response once you have answered all of the questions

Questionnaire Voice of the Supplier

Exit

Supplier Name : Zebra
Name : Voice of the Supplier
Response Deadline from Dispatch : 04/08/2017

The questionnaire elements are saved as they are edited and so changes cannot be cancelled

Submit Response

Please assess the relationship with your customer by completing the questions below. The Supplier Manager will contact you to discuss the outputs and any subsequent actions.

1. To what extent does the client provide policies and standards which are clear, reasonable and consistently applied? *

1 - Never 2 3 4 5 6 7 8 9 10 - Always

Clear Answer

2. How clear are the roles and responsibilities? *

1 - Not at all 2 3 4 5 6 7 8 9 10 - Very

Clear Answer

3. To what extent does the client protect your organization's reputation? *

1 - Never 2 3 4 5 6 7 8 9 10 - Always

Clear Answer

4. To what extent does the client pay invoices on time? *

1 - Never 2 3 4 5 6 7 8 9 10 - Always

Clear Answer

5. To what extent do client actions allow your organization to drive cost efficiencies and achieve a reasonable margin? *

1 - Never 2 3 4 5 6 7 8 9 10 - Always

Clear Answer

6. To what extent does the client provide useful, accurate and timely information to enable your organization to meet requirements? *

1 - Never 2 3 4 5 6 7 8 9 10 - Always

Save Progress

Questions suffixed with an asterisk (*) are mandatory and should be completed prior to your final submission.

This button allows you to remove any response added for the question

Once all the questions on this tab has been responded to you can save and it will change to the next tab, if you want to save what has been completed so far so you can go back to the information you can also click here

3.3 Meeting Actions

As a user of Catalytics you can also have meeting actions assigned to you, if any are assigned they will appear in the dashboard widget named Actions which will state the status and due date.

To view and update the action simply expand SRM Daily in the left hand menu the select Manage Meeting actions.

This will display all meeting actions even those that have been completed.

The screenshot shows a filter interface for meeting actions. At the top, it says "Filter Applied : None". Below this are several filter sections:

- Due Date:** Two date pickers, both set to "July 28 2017".
- Status:** A list of checkboxes: Open, In Progress, On Hold, Closed, and Cancelled. All are checked.
- Priority:** A list of checkboxes: Low, Normal, and High. All are checked.
- Supplier Name:** A text input field with a "Clear Text" button.

An "Update Results" button is located below the filters. Below the filters is a table with the following data:

Supplier	Subject	Title	Details	Status	Priority	Assignee	Due Date
Zebra	Operational Review	Review the Initiative Document		InProgress	High	User 12	28/07/2017

Select the one that you're currently working on, you will be able to update the status and add notes to the action.

The "Edit Meeting Action" dialog box contains the following fields:

- Status:** A dropdown menu currently set to "In Progress".
- Assignee Notes:** A large text area for adding notes.
- Objective:** A dropdown menu currently set to "No Meeting Objectives".

At the bottom of the dialog are "OK" and "Cancel" buttons.

3.4 Repository Data

Within the SRM module there is a repository where documents can be uploaded and shared with the client. There are 2 parts to the repository:

- 1) Repository Requests – This is where Catalytics will send you a request via email to upload a document. The request will include a deadline by which the upload needs to be completed.

The screenshot shows the "Manage Repository Data Requests" interface. At the top, it says "Filter Applied : Status (New, Rejected, Error) X". Below this are several filter sections:

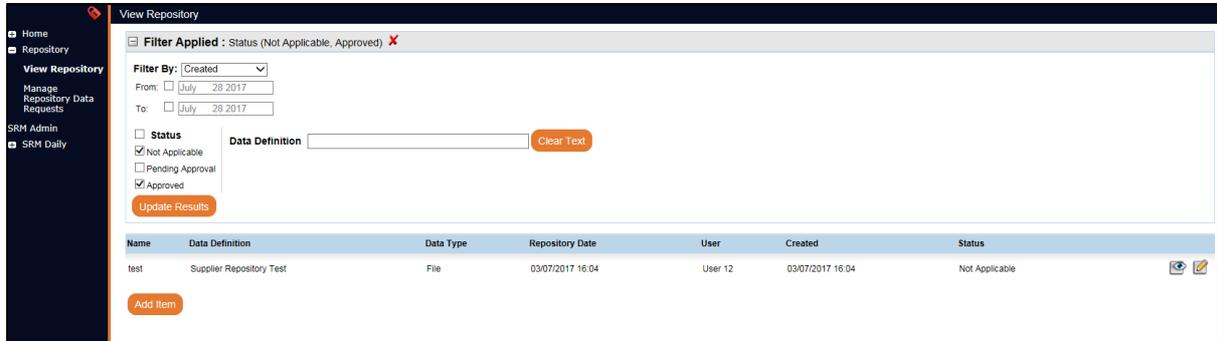
- Deadline:** Two date pickers, both set to "July 28 2017".
- Data Definition:** A text input field with a "Clear Text" button.
- Status:** A list of checkboxes: New, Pending Approval, Rejected, and Error. "New", "Rejected", and "Error" are checked.

An "Update Results" button is located below the filters. Below the filters is a table with the following data:

Name	Data Definition	Description	Deadline	Status
Supplier Assurance - Approval RK	Supplier Assurance - Approval		15/07/2017 00:00	Rejected
UAT Test 03/07	UAT Test 03/07	Upload the Blah template for blah meeting	26/07/2017 00:00	New

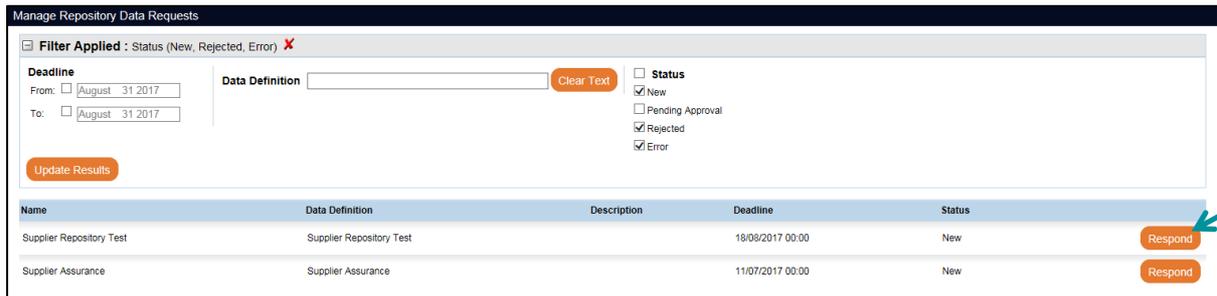
Each row in the table has a "Respond" button to its right.

- View repository – This allows you to view any documents that have been uploaded and to which you have been granted access. You are also able to upload documents directly into the repository without a request.

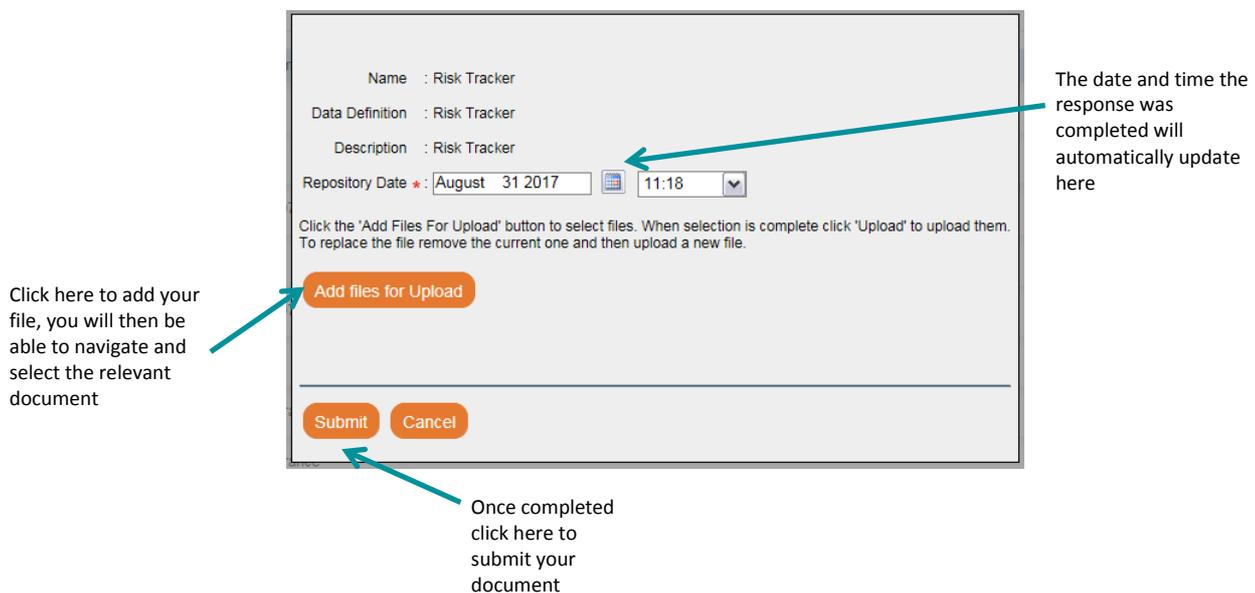


3.4.1 Responding to a Repository Request

To respond to a repository request you first need to navigate to Manage Repository Data Requests which can be accessed either by using the quick link within the dashboard or by using the left hand menu. This will display all the repository requests that have been sent to you and are currently awaiting your response.



Once respond is clicked the following pop-up box will appear, you will need to upload the most recent version.



3.4.2 Adding a Document to Repository

You can also add documents into the repository without receiving a request and this is completed in View Repository. Within this page you will also be able to see and access any repository data items that have been uploaded either by yourself or by your client Relationship Manager.

To view the uploaded repository click here

The screenshot shows the 'View Repository' interface. At the top, there is a filter bar with the text 'Filter Applied : Status (Not Applicable, Approved) X'. Below this, there are filter options: 'Filter By: Created', 'From: August 31 2017', and 'To: August 31 2017'. There are also checkboxes for 'Status' (Not Applicable, Pending Approval, Approved) and a 'Data Definition' input field with a 'Clear Text' button. An 'Update Results' button is also present. Below the filters is a table with the following columns: Name, Data Definition, Data Type, Repository Date, User, Created, Status, and a column with icons for viewing and editing. The table contains four rows of data:

Name	Data Definition	Data Type	Repository Date	User	Created	Status	
Risk Tracker	Risk Tracker	File	31/08/2017 09:17	User 5	31/08/2017 09:18	Approved	
Test 2	Supplier Repository Test	File	12/07/2017 09:07	Internal User	12/07/2017 09:08	Not Applicable	
Test	Supplier Repository Test	File	12/07/2017 09:06	User 5	12/07/2017 09:07	Not Applicable	
djsSmoker1	Supplier Assurance	File	01/07/2017 21:14	Internal User	01/07/2017 21:16	Not Applicable	

At the bottom left of the table area, there is an 'Add Item' button.

To add a document to repository click here

When Add New is clicked, the below pop-up box that will appear to allow you to upload your document into the repository.

If there is a repository request outstanding for the definition chosen it will show here

The 'New Repository Data Item' pop-up form contains the following elements:

- A warning icon and text: 'There is an outstanding Repository Data Request for this Data Definition. Click here to review outstanding Repository Data Requests'.
- A 'Data Definition' dropdown menu currently set to 'Supplier Repository Test'.
- A 'Name' input field.
- A 'Repository Date' field with a date picker set to 'August 31 2017' and a time dropdown set to '11:36'.
- Instructions: 'Click the 'Add Files For Upload' button to select files. When selection is complete click 'Upload' to upload them. To replace the file remove the current one and then upload a new file.'
- An 'Add files for Upload' button.
- 'Save' and 'Cancel' buttons at the bottom.

Select the type of repository item from the dropdown list provided

The name will auto populate with the type of repository you have chosen, however this can be changed

The date and time will auto populate

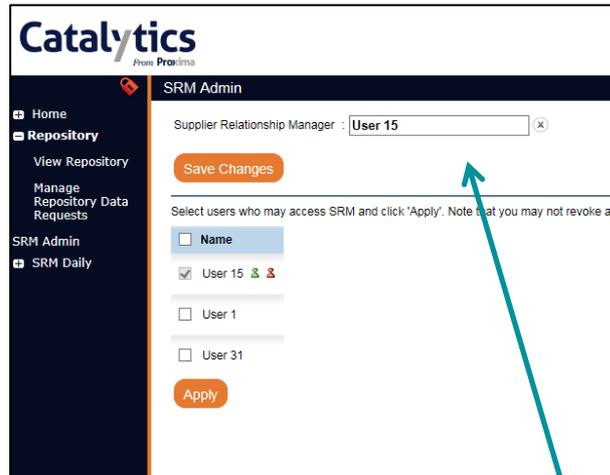
Click here to add your document

Once document added select Save

3.5 Adding Additional Users to SRM

If another colleague needs to be added to Catalytics please contact your Client Internal Relationship Manager. They will arrange for a user account to be created and, once set-up, the new user will receive an email to notify them of the login details.

To enable the new user to access the SRM module, the Supplier Relationship Manager needs to access the SRM Admin option in the left hand menu. When selected this will show you a list of all of the current users your company has created. You can then select the tick box against the new user to provide them with access to SRM and click Apply.



In the same SRM Admin screen, you can also change the Supplier Relationship Manager by clicking here and starting to type the name. A drop down will then appear and you can select the required name and save the changes. This will also automatically update the client account.