Catalytics Supplier User Guide

July 2017

Proxima
107 Cheapside
London, EC2V 6DN

Proxima
Kavanagh House
The Pavilions
Llantarnam Park
Cwmbran, NP44 3FD

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
Unclassified: information which has not been classified to any categories below **NB: Contractual confidentiality applies.**	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

Contents

1. Glossary

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

Symbol	Explanation
	View
	Edit

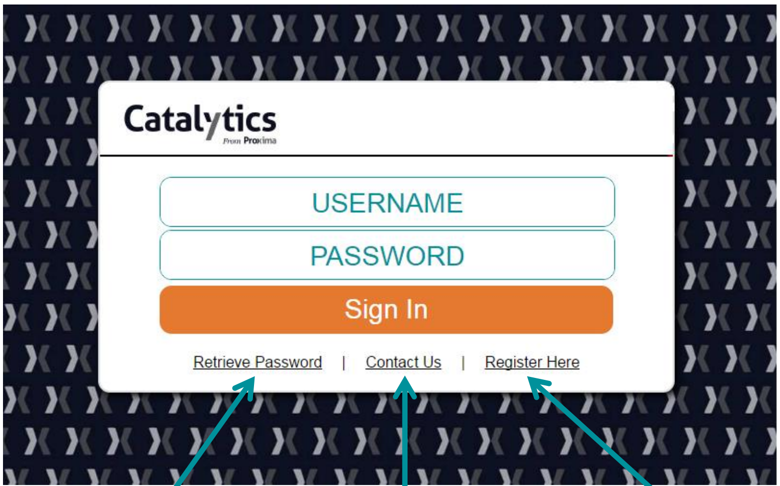
Terminology	Definition
Actions	These form part of the meetings, when a meeting has taken placed and tasks have been agreed you can then set them up as Actions which are set up against the individual who will be completing the task. This will also appear in the widget within the dashboard named Actions
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:-



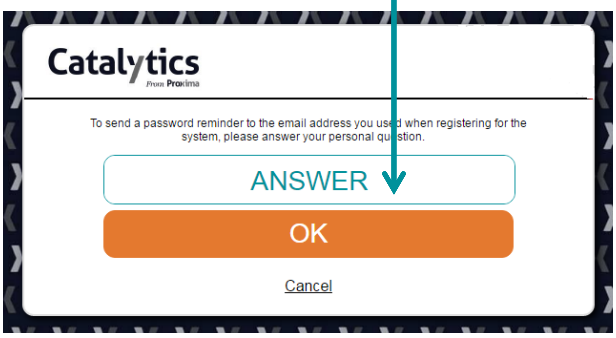
If you forget your password you can click think link to send the password to your email account

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

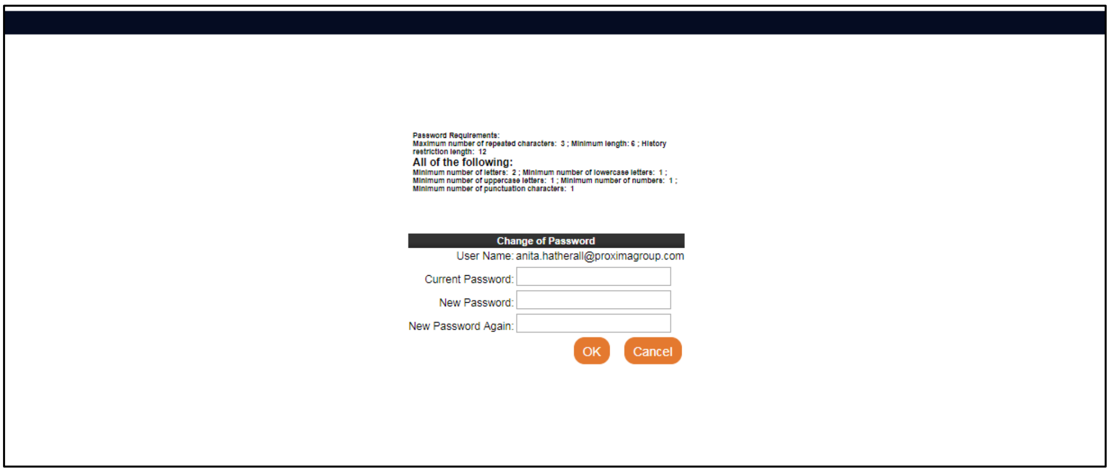
2.2 Retrieve Password

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.

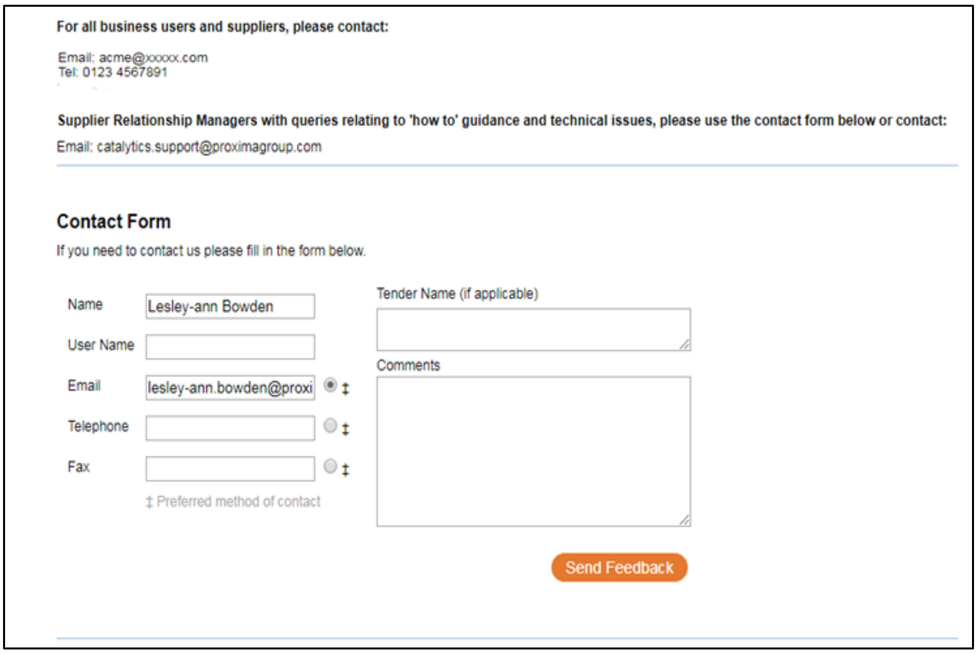


Once the new password has been created press save, this will overwrite the current password and will be required the next time the user logs into the application.

2.3 Contact Us

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

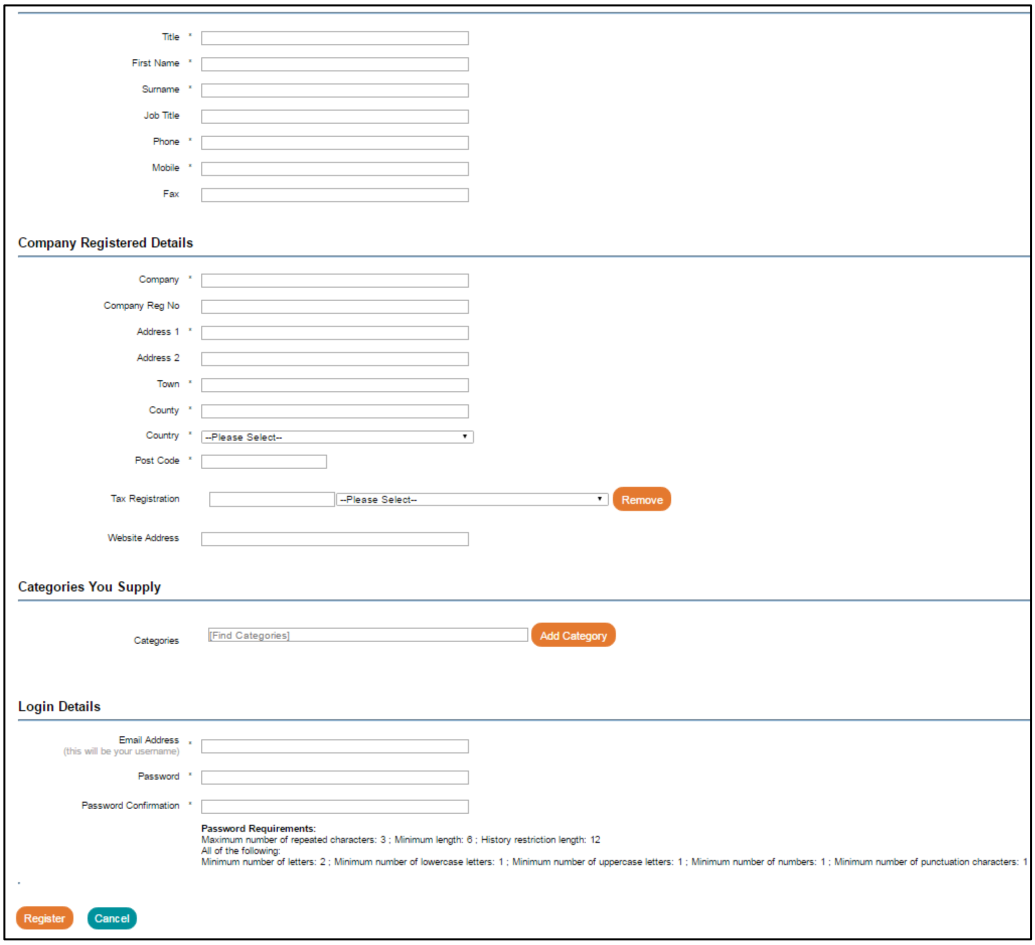
The Contact Form is used for internal business users.



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.

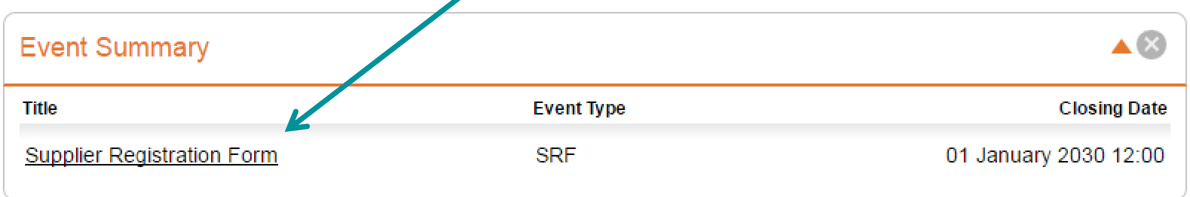
Once this has been completed simply click register, you will then receive an email to notify you that the account has been created.



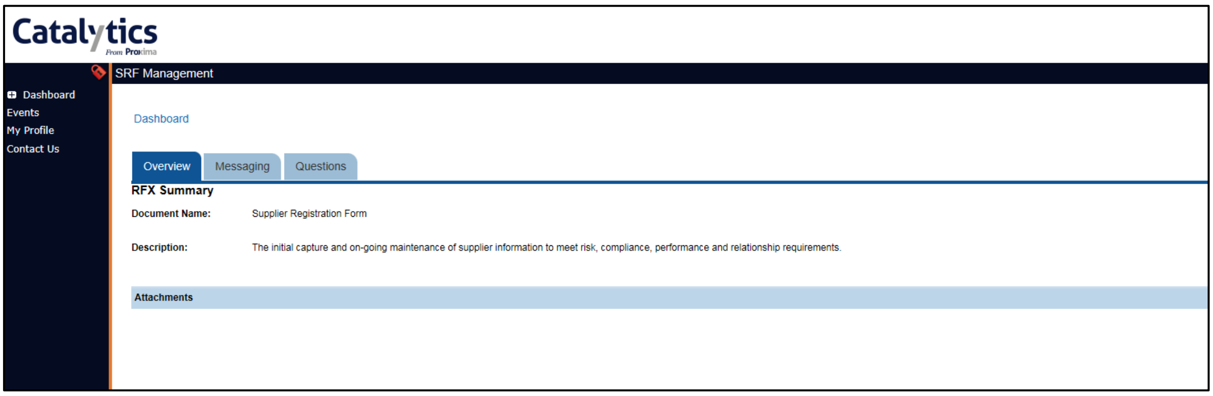
2.5 Supplier Registration Form (SRF)

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.



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

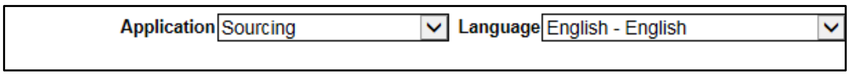


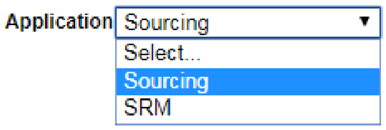
The overview will provide a brief description of the document, there is a message board available which you can use to contact the client and the client can contact you. The content of the questionnaire is within the Questions tab.

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.

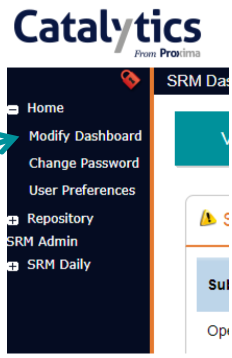




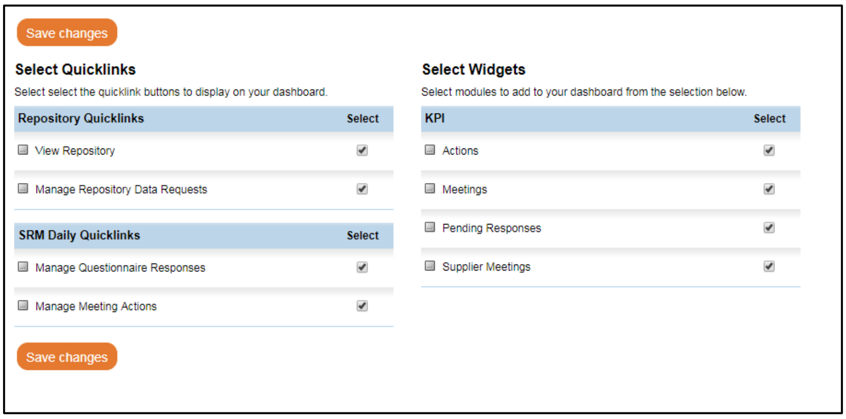
When you first login into the Catalytics portal the dashboard screen for the SRM module will be blank. The reason for this is that you can choose which widgets and quick links you would like to view within your dashboard. Once you have chosen the widgets you would like to view you can also change the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

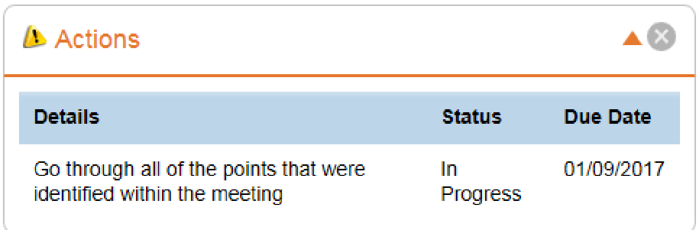


This will then load the page where all of the Quick links and Widgets can be chosen, you can select which ones you would like to appear by clicking on the tick box which appears against the name of the option. Once you have selected the options you would like available please click on Save Changes.



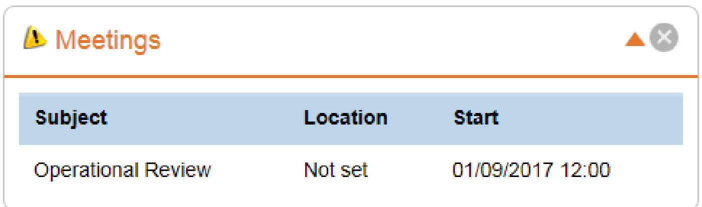
3.1.1 Actions Widget

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.



3.1.2 Meetings Widget

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



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.

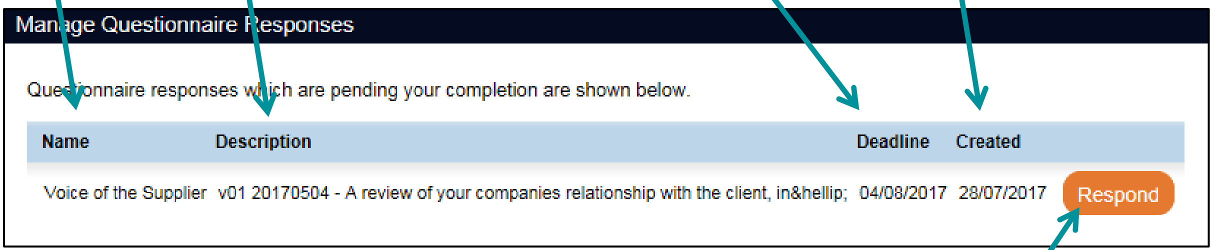
You can also view of the pending responses in the Manage Questionnaire Responses which appears in the left hand menu and is also available as a quick link.

Name of the questionnaire

The description of the questionnaire

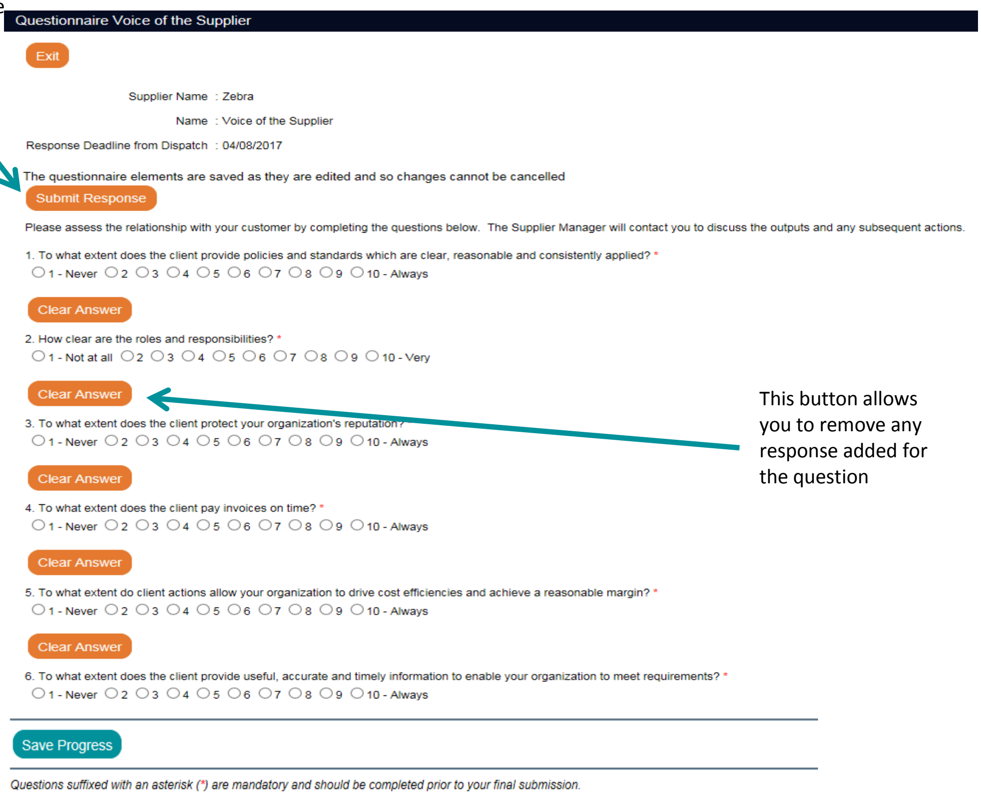
The date the response needs to be received by

The date the questionnaire was dispatched



Click here to view the questionnaire and to respond

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



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

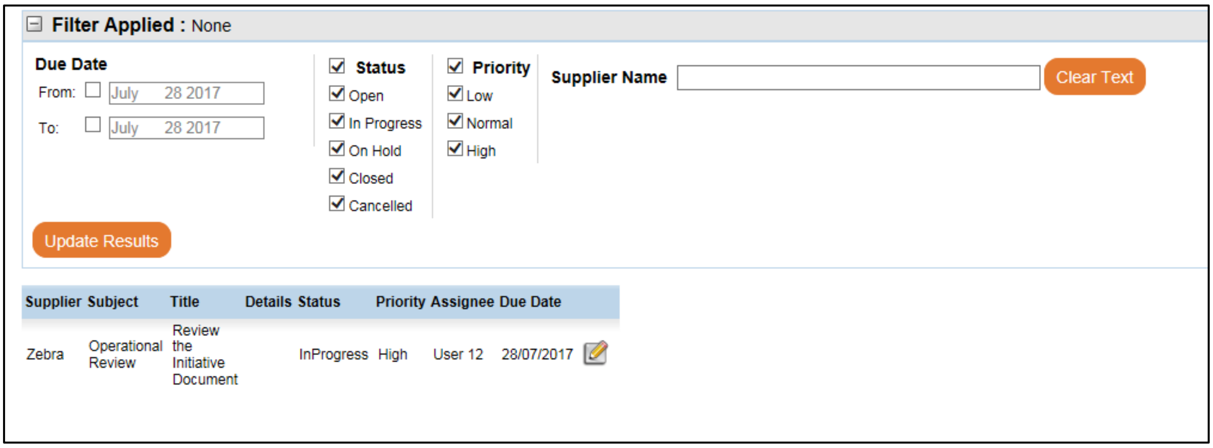
Once all the questions on this tab has been responded to you can save and it will change to the next tab, if you want to save what has been completed so far so you can go back to the information you can also click here

3.3 Meeting Actions

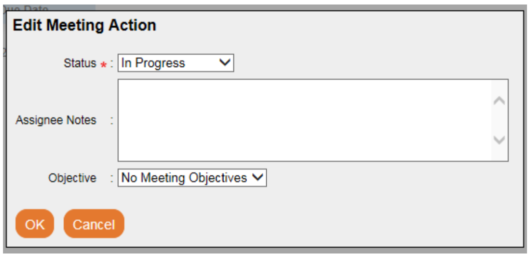
As a user of Catalytics you can also have meeting actions assigned to you, if any are assigned they will appear in the dashboard widget named Actions which will state the status and due date.

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.



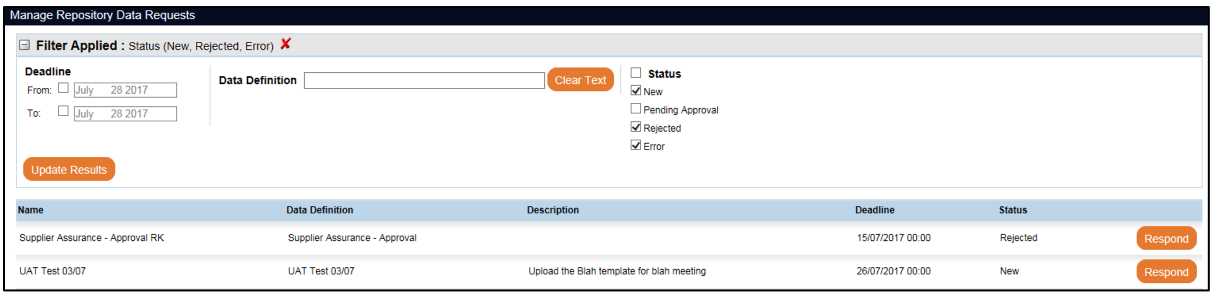
Select the one that you're currently working on, you will be able to update the status and add notes to the action.



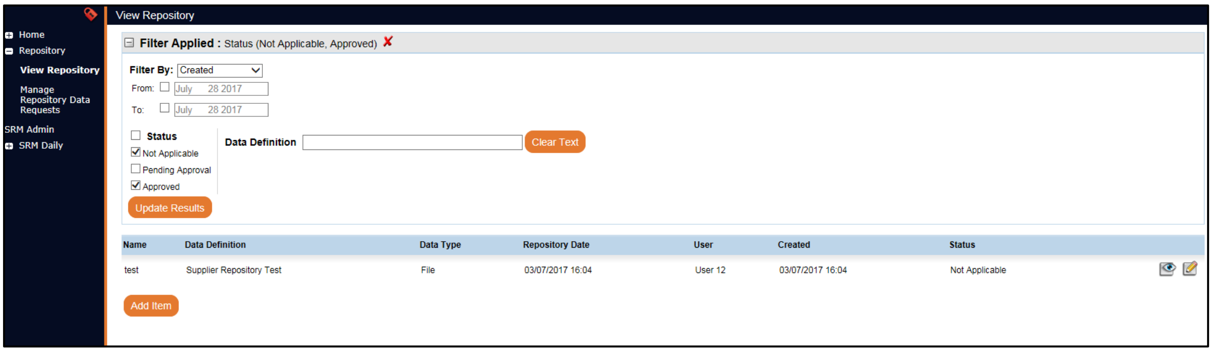
3.4 Repository Data

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.

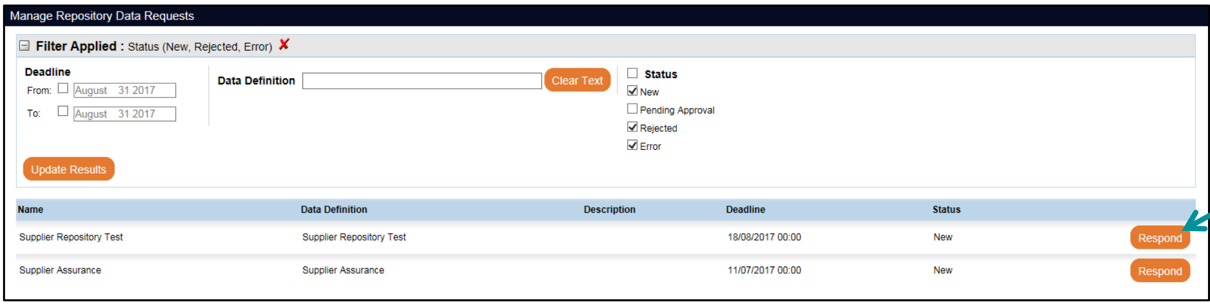


2) View repository – This allows you to view any documents that have been uploaded and to which you have been granted access. You are also able to upload documents directly into the repository without a request.



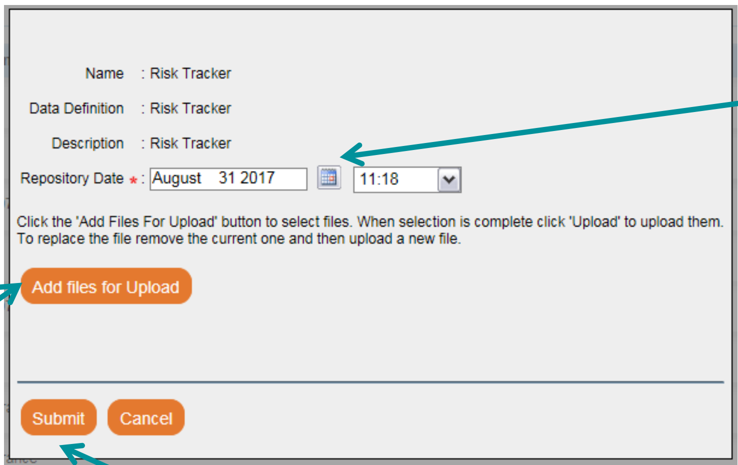
3.4.1 Responding to a Repository Request

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.



Click here to respond to the request

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



The date and time the response was completed will automatically update here

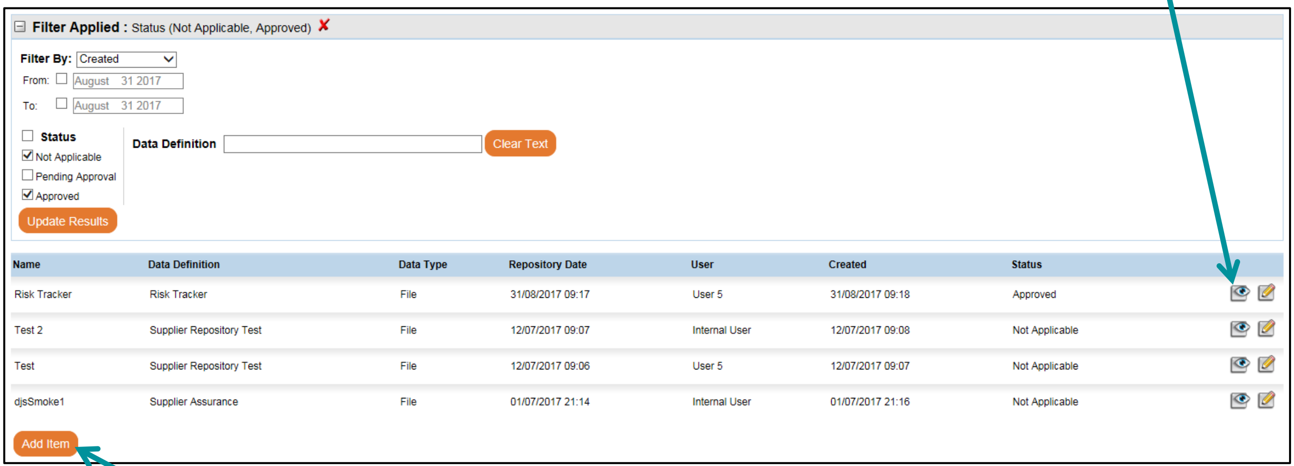
Click here to add your file, you will then be able to navigate and select the relevant document

Once completed click here to submit your document

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

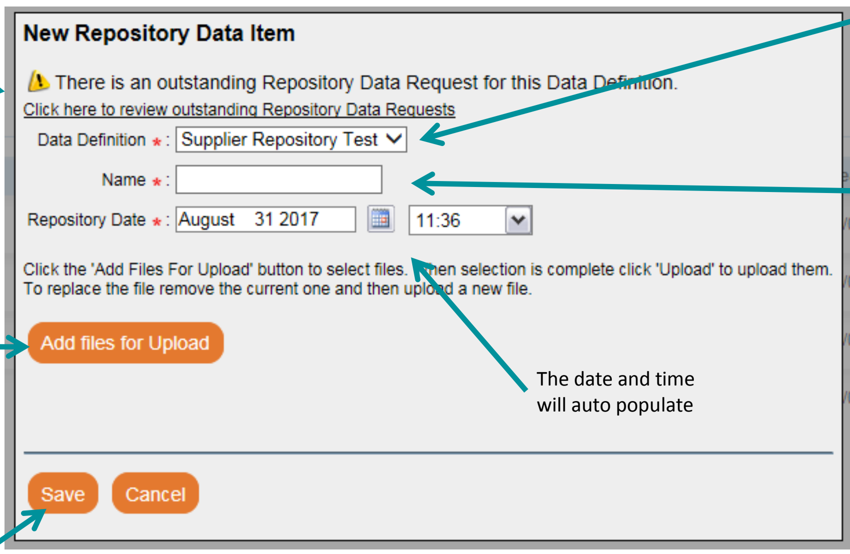


To add a document to repository click here

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

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

Click here to add your document

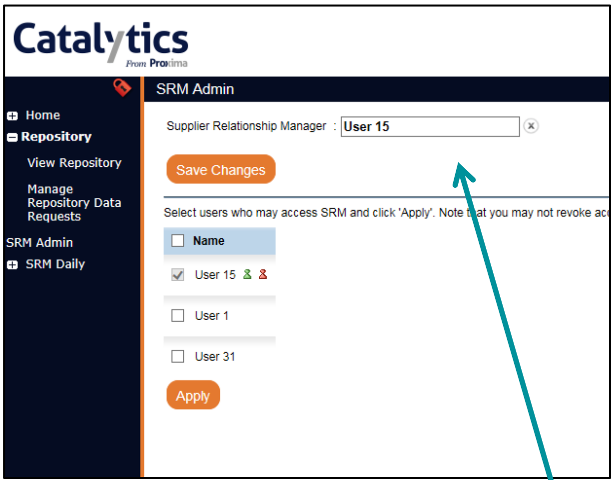
The date and time will auto populate

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.