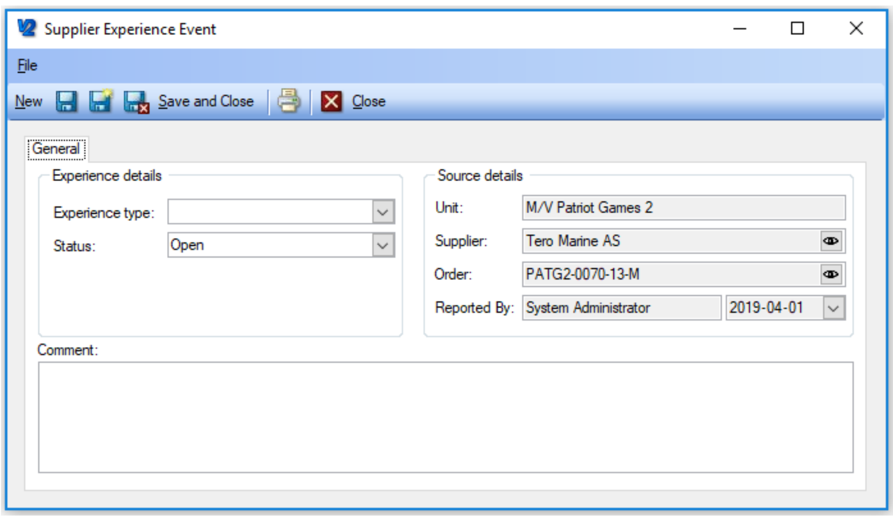
Contents

The Supplier Experience log function.

This function will allow you to record your day to day experience with your suppliers. This is not directly related to the assessment module. However, it is a tool that could be used as source to answer your assessment questions, and it is included as part of the "Supplier Assessment" license.

How to record a supplier experience event?

1. Click the  [Add new supplier experience event] button which can be found on the following locations within TM Master.
    a. [Purchasing] → [Overview] → Middle grid menu bar
    b. [Order head] form menu bar
    c. [Contact] form menu bar
    d. [Receive order] form menu bar
2. The following form should open:



3. Experience details field group:
    a. Select one of your predefined "Experience types".
    b. Select the status for the experience either "Open" or "Closed". If you need some additional follow up you may keep it as "Open", but if no immediate processing is required you can set it to "Closed"
4. The "Source details" group will display:
    a. The Unit related to the experience.
    Either the related order owner or the unit where the event entry is created.
    b. The Supplier name linked to the experience.
    Clicking the [Eye] icon at the end of the field will open the supplier details
    c. If the Experience is created from a particular order, the order number will be shown in this field. This field might be empty if the experience event is not linked to an order. (Created from the [Contact] form)
    d. The name of the user creating the experience event is automatically captured as well as the creation date.
5. The description of the experience event can be added in the "Comment" field.
6. Click [Save & Close]

The automatically recorded “Supplier Experience Events”

A typical supplier experience would be that you need to remind the supplier to respond to either your “request for quotation”, “request for order confirmation” or even “order delivery”. TM Master has a send reminder function . Dependent of the orders current status it will send different types of reminders.

- If status is within the “RFQ” statuses it will send a “Request for quotation” reminder.
- If status is “On order” but not confirmed it will send a “Request for order confirmation” reminder
- If order is confirmed, but not received it will send a “Request for delivery” reminder.
- If order is partly received, it will send a “Complete delivery” reminder.

This function will also automatically create an experience event (without user interaction) with a “Experience type” matching the reminder send. In the description field the system will record the time passed since the latest status was set up until the time the reminder was sent.
IE: “Order confirmation reminder sent 5 days 3 hours 30 minutes after order sent”

How to review the recorded supplier experience events?

How to create an assessment template?

1. Click [Fleet] → [Assessments]
2. Click [New]
3. The following empty form should show up.

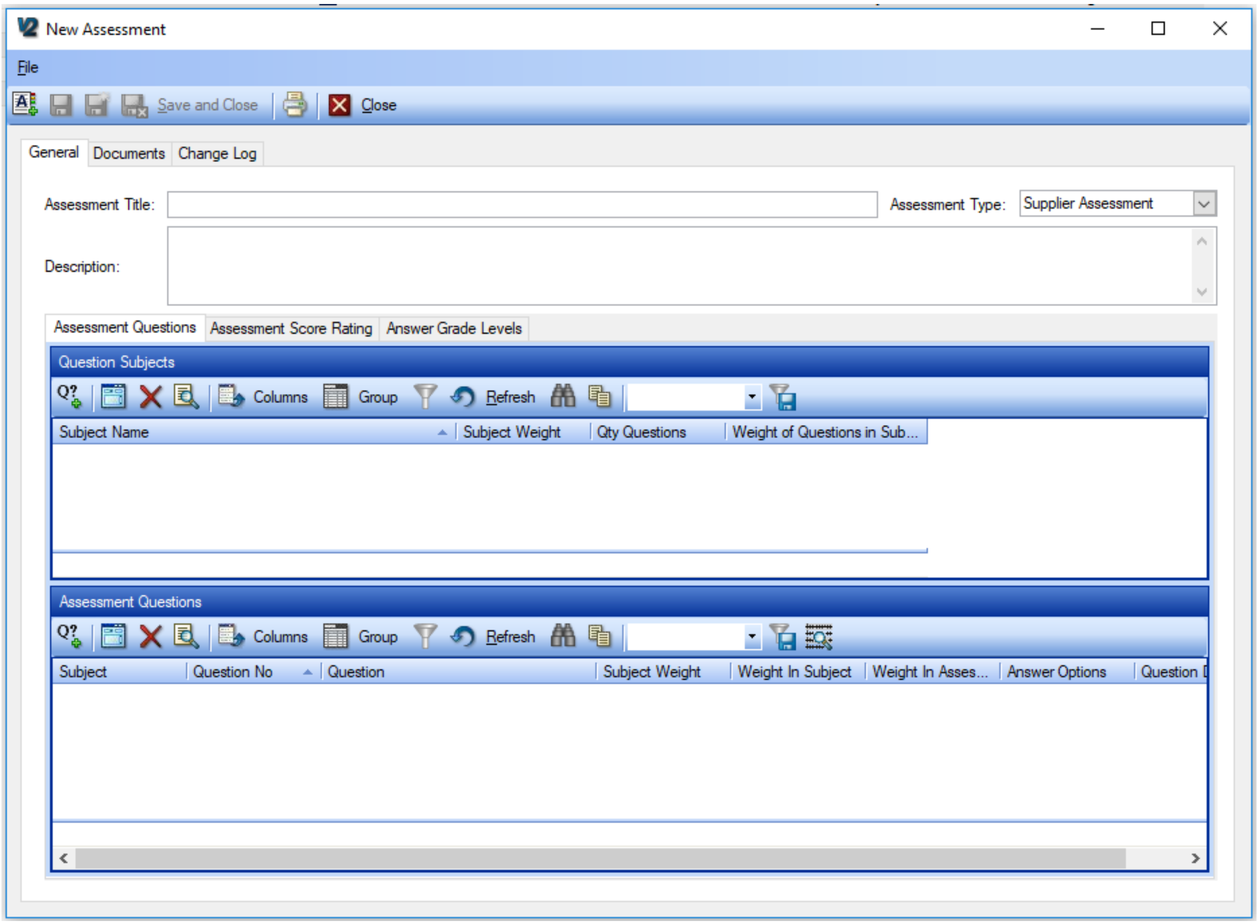


FIG 1: ASSESSMENT FORM (EMPTY)

4. Fill in details in the following fields:
   4.1. **Assessment title:** Enter the "Assessment title" / "Assessment Template name"
   4.2. **Assessment type:** Select an assessment type
   - **Supplier Assessment:** For internal supplier assessments that are used internally to score\assess a supplier
   - **Supplier self-assessment:** For assessments that will be sent to the supplier in an excel sheet which the supplier can answer themselves.
   - **Delivery Assessment:** To create a delivery assessment, which can be run (optionally or mandatory) per order delivery, when order is received.

   4.3. **Description:** Add a short description of the assessment if needed
   4.4. Click [Save]
   4.5. You have now created an empty "Assessment template"

How to add an Assessment Subject?

Organizing your assessment questions in subjects is a good idea, as it will allow you to aggregate the result assessment score based on a subject. It will also make it easier to distribute importance or weight on the subject that currently matters to your organization. In TM Master you will need to at least add one subject, before adding questions.

1. Click [Fleet] → [Assessments] → Double click on the assessment you wish to add one or more subjects to, or create a new one (ref chapter above)
2. On the "Assessment Questions" sub tab in the middle of the assessment form you will find the section/grid called "Question subject"

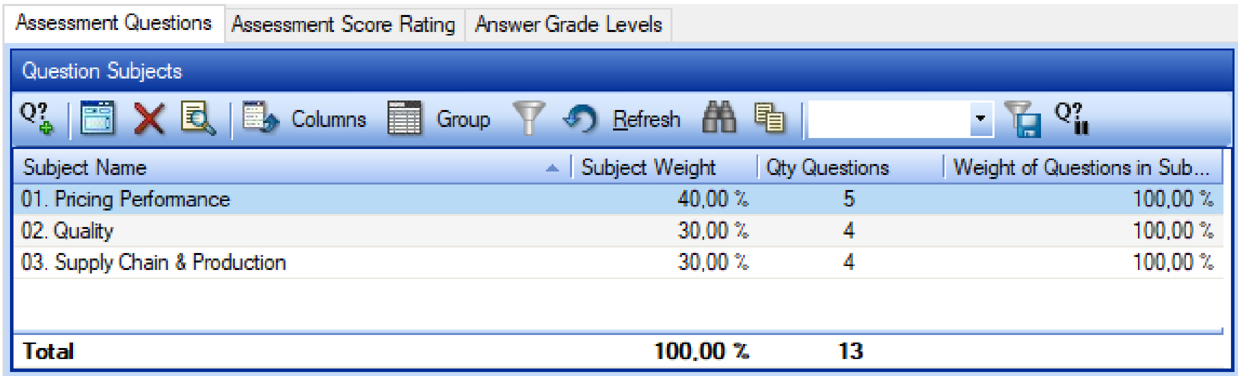


FIG 2. QUESTION SUBJECTS GRID

3. Click the Q? **[Create New Question Subject]** button.

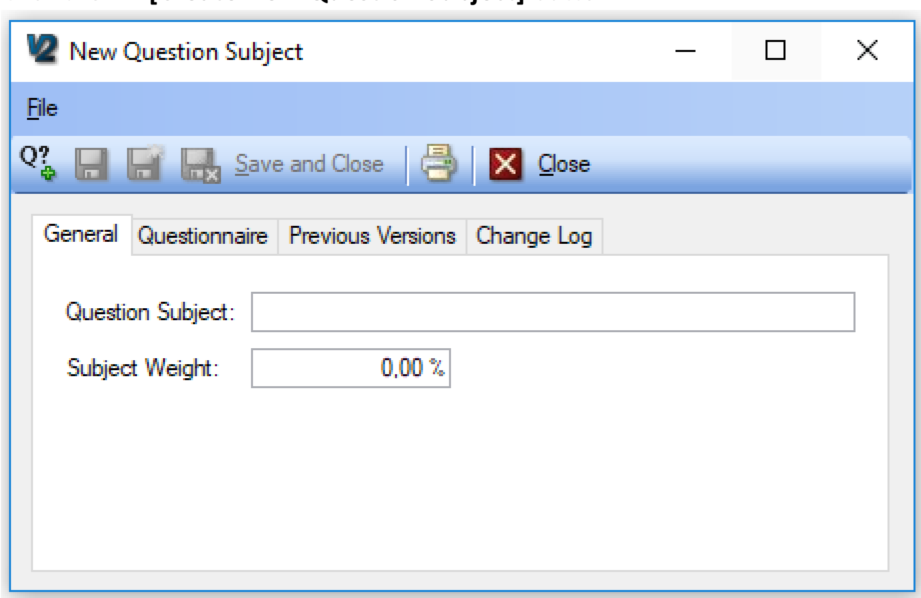


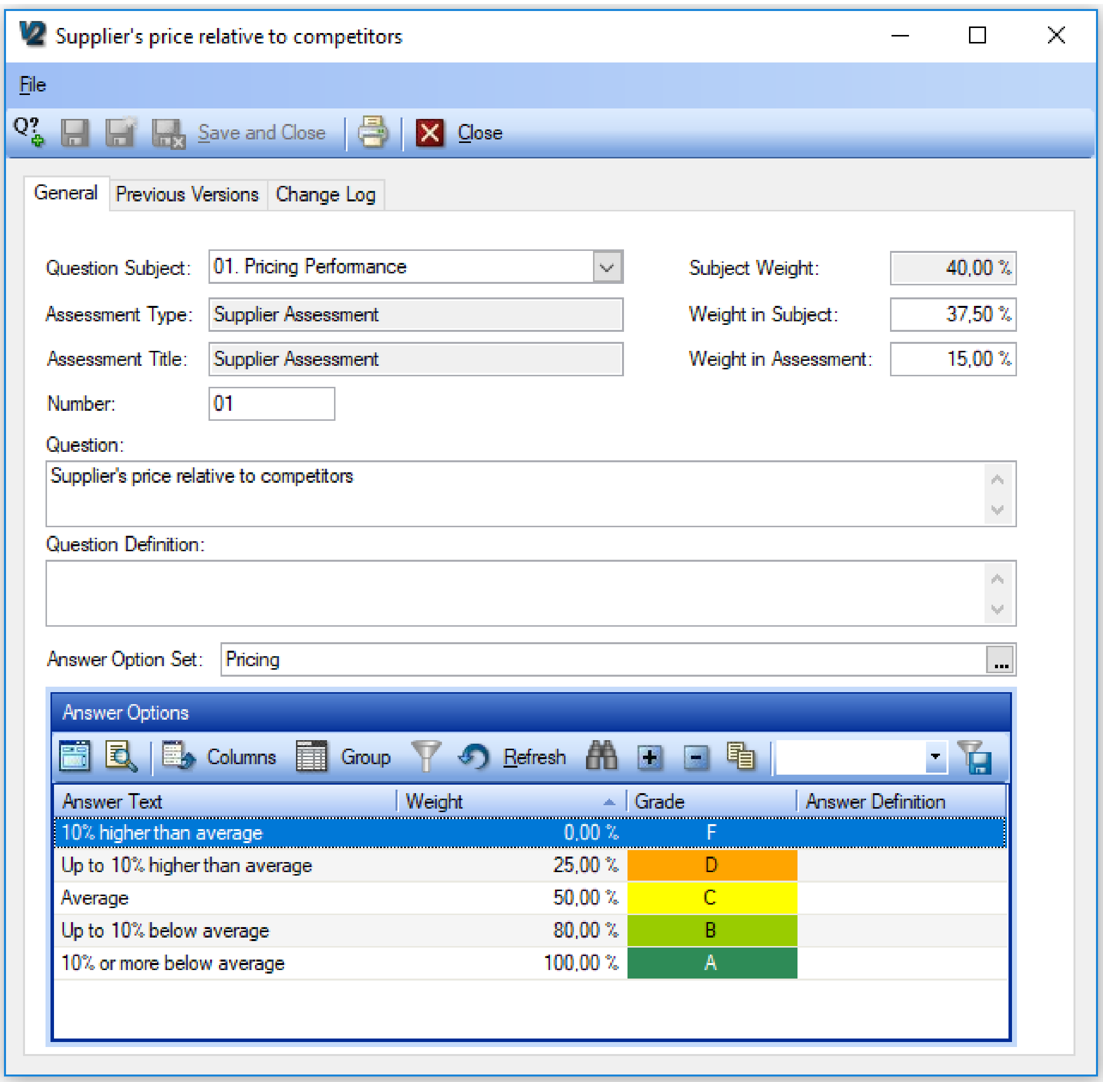
FIG 3: QUESTION SUBJECT FORM

4. **Question Subject:** Enter the Question subject
5. **Subject Weight:** Enter the subject weight as a percentage. The distribution of the weight is of course up to you, as long as the subjects, within the assessment template, added together = 100%
6. Click **[Save & Close]**
7. Repeat until all your subjects has been added and total subject weight = 100%
   You can double click a subject, once added, to reopen and make changes to it.

How to add an Assessment Question?

Once the question subjects have been added (ref chapter above) to the assessment template, it is possible to start adding the individual questions for each subject. The question should be formalized in a way which allow for short concise answers as you will be required t create answer options also.
It is possible to enter answers as free text comments, but it will not be possible, at least for TM Master, to calculate a score based on the free text.

1. Adding questions are done in the lower grid in the assessment form called "Assessment Questions"
2. Click the Q? [Create New Question] button



3. Fill in the Question details:
   3.1. **Question Subject:** Select a subject among the templates question subjects.
   3.2. **Assessment Type:** This field is for information only and will show the assessment template's assessment type.
   3.3. **Assessment Title:** This field is for information only and will show the title\name of the assessment template.

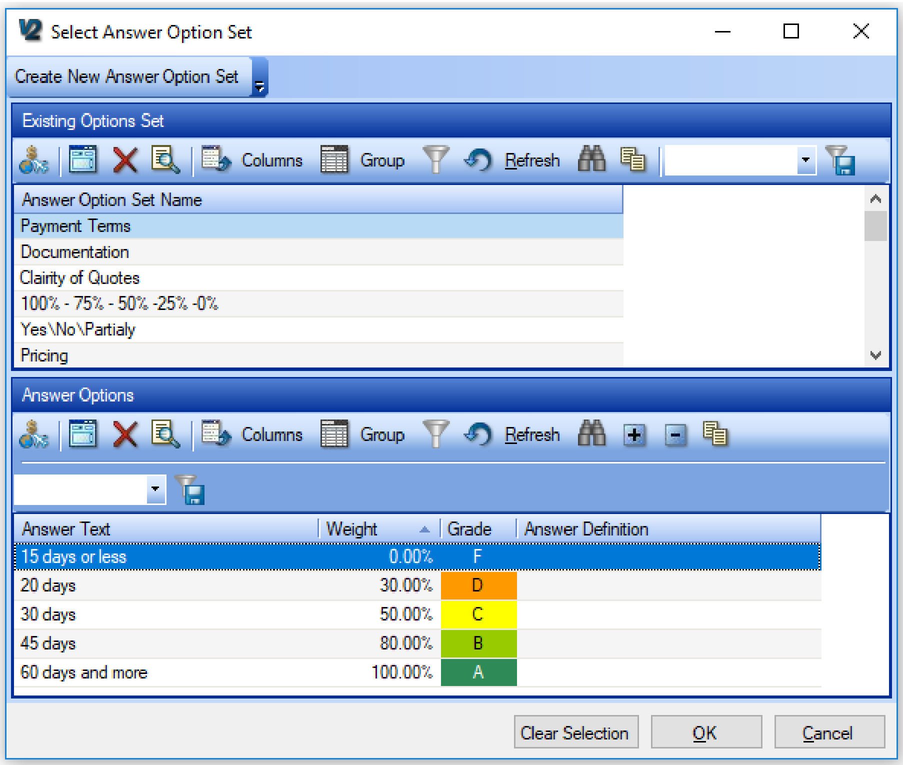
3.4. **Subject Weight:** This field will show the selected subject weight in the assessment. It is not editable in this form.
3.5. **Weight in subject:** Here you place the weight\score this question has within the selected question subject. The distribution of the weight is of course up to you, as long as the total question weight, within the subject, added together = 100%.
3.6. **Weight in Assessment:** This field will show the questions total weight within the entire assessment. It is possible to enter a value in this field directly. The Weight in the assessment will then be calculated. The “weight in assessment” can’t exceed it’s subjects weight in the assessment.
3.7. **Number:** This is a manual numbering field, which can be used for sorting of the questions in the grids later and it is used for this purpose in the report.
3.8. **Question:** This is where the question is written.
3.9. **Question definition:** For any additional explanations\clarifications related to the question.
3.10. **Answer Option Set:** This field will allow for selecting an existing or to create a new answer option set. Please see next chapter to get more details on the Answer option sets.

4. Click [Save]
5. Rinse and repeat, until all questions have been added.

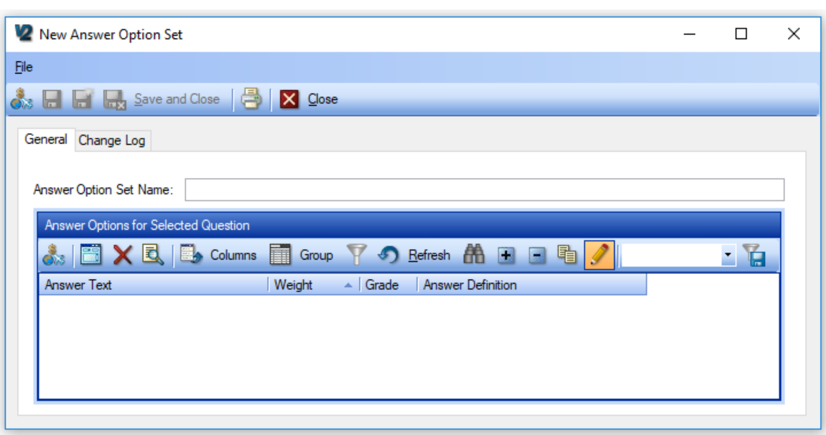
How to add an Answer Option Set?

An “Answer Option Set” is a list of possible predefined answers to a question. Each answer option is assigned a score rating. Examples: (Yes, No), (Yes, No, Partially), (Very Good, Good, Medium, Poor, Very Poor), etc. Here is how to create an “Answer Option Set”.

1. Open or create a new question (ref. chapter above)
2. Click the […] button at the end of the “Answer Option Set” field
3. Select an existing answer option set in the top grid.
4. A Preview of the answer options is displayed in the grid below

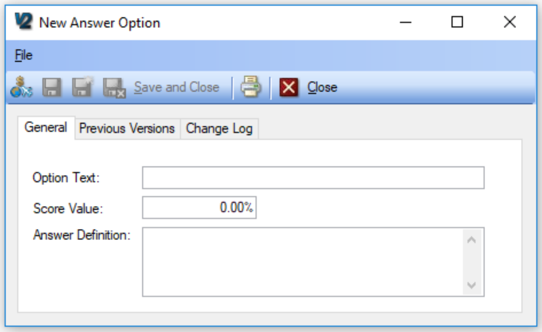


5. If the none of the existing answer option sets meet the requirement for the question you can create a new one by clicking the [Create new Answer set] button on the far left-hand side of the top menu bar in the “Select Answer Option set” dialog



6. Enter a name for your answer option set:
7. Click [Save]

8. Click the [New] button in the answer option grid menu bar.

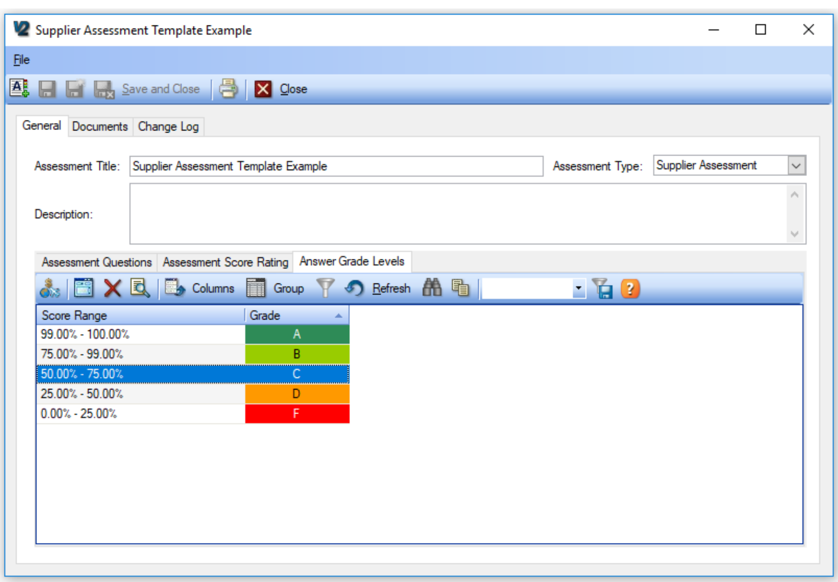


9. Enter the answer option text. Which will be on of the actual answer options for this set.
10. Enter a score value for your question. Any value from 0 % - 100% score is valid. If an answer option is marked with 100% score value, selecting this answer in the assessment will give max score to the question. Max score to the question equals to the full questions weight.
11. If you want to add additional information to the answer option, this can be placed in the Answer definition field.
12. Click [Save and Close]
13. If your answer options are not "Graded" (colour and grade letter) as shown in image in step 4, this is due to missing "Answer grade levels". Next chapter will explain how to configure them.

How to set up the "Answer Grade levels"?

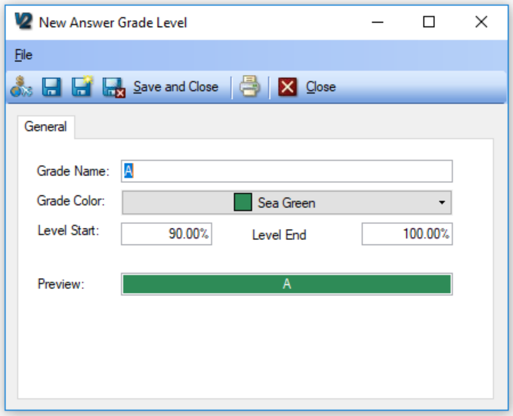
The "Answer Grade Levels" is used to grade each answer based on the score the answer has for a question. Once it has been set up for an assessment it will apply to all the question in the assessment.

1. Open the Assessment in question
    a. Click [Fleet] → [Assessments]
    b. Double click the Assessment in question (in the top grid)
2. Click the "Answer Grade Levels" sub tab



3. If there are other existing assessments defined already, it is possible to copy the "Answer Grade Levels" for one of them to the current assessment. Click the [Copy Answer Grade levels] button to the far right-hand side of the grid menu bar. And then select the assessment you wish to copy it from and click [OK]

4. To create a new answer grade set, click the [Create New Grade] to the far left-hand side in the grid menu. The following dialog will appear.



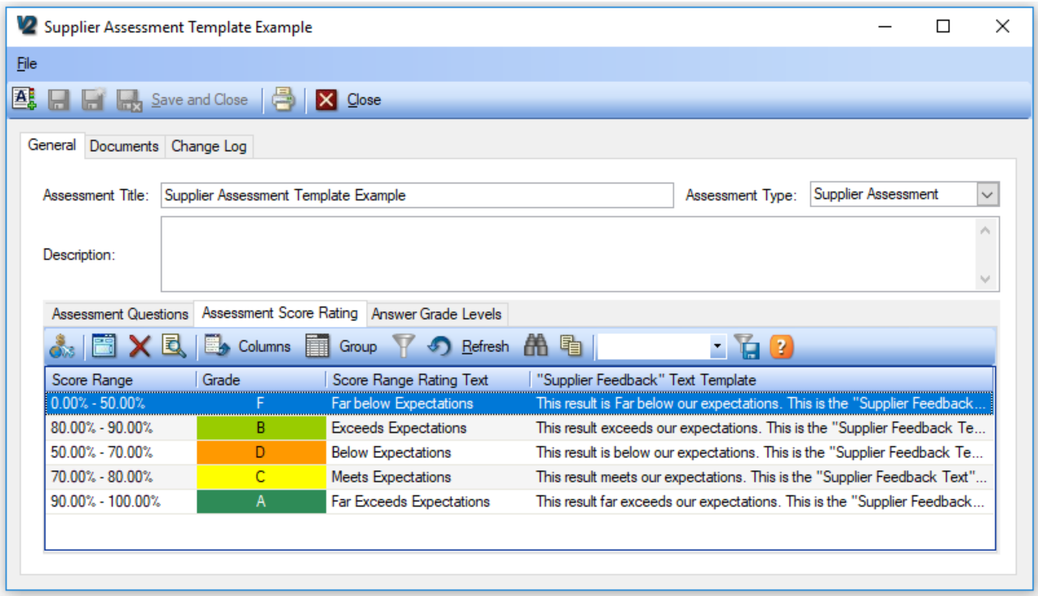
5. Enter a Grade name, it can be a text string or just one letter or number
6. Select the Grade colour
7. Enter the "Grade level start" and the "Grade level end". Any answer given that has a score within the give range will be assigned this grade.
8. A preview of the grade appearance is displayed at the bottom.
9. Create as many grades you need, and make sure that you have created grades that covers all the possible scores between 0 to 100 %

How to set up the Assessment Score Rating?

The "Assessment Score rating" is used to grade the total result of the entire assessment. Once it has been set up for an assessment it will apply to all the assessments based on the assessment template.

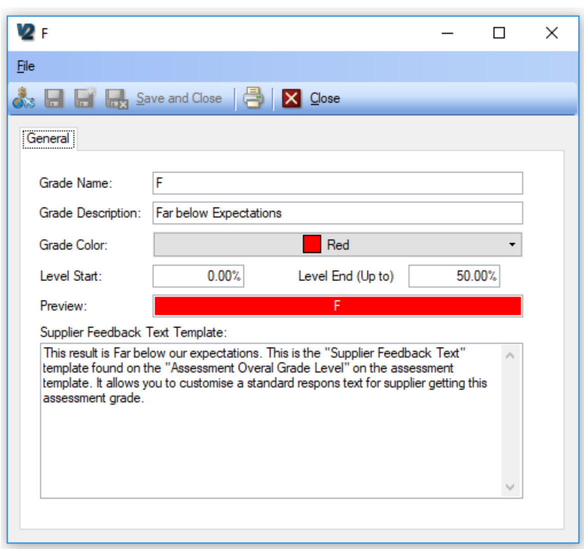
1. Open the Assessment in question
   a. Click [Fleet] → [Assessments]
   b. Double click the Assessment in question (in the top grid)

2. Click the “Assessment Score Rating” sub tab



3. If there are other assessments already in the system it is possible to copy the “Assessment Score Rating” setup from one of them, by clicking the [Copy Assessment Score rating] button on the far right-hand side of the grid menu. Then select the assessment you want to copy it from and click [OK]

4. To create a new one click the [Create New Grade] button in the far left-hand side of the grid menu.



5. Enter the Grade Name: Preferably one letter.
6. Enter the Grade description
7. Select the Grade colour
8. Enter the “level start” and “level end” values. Any assessments where the score falls within these parameters will get this grade.

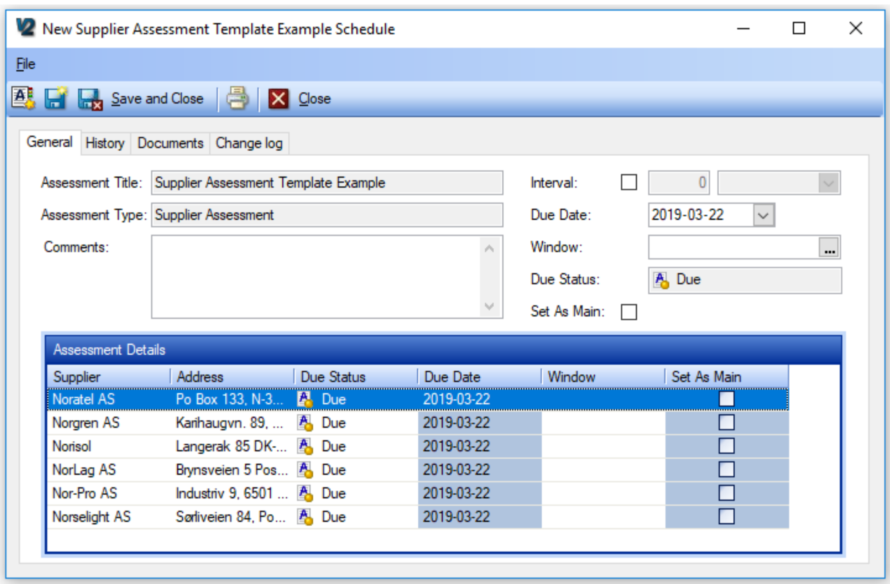
9. It is possible to send the completed assessment as an email to the assessed supplier, the text added to the field “Supplier Feedback text template” can be used to add a general description or comment on the assessment result. This text is made available in the end report.

How to schedule an Assessment?

Once you have completed the assessment template it will be a good idea to schedule the assessments for your suppliers. This is how the “Supplier Assessments” and the “Supplier Self-Assessments” are scheduled.

How to schedule and assessment for suppliers?

1. Click [Fleet] → [Assessments]
2. Select the assessment you wish to schedule in the top grid
3. Then click the [New Assessment Schedule] button in the lower grid.
4. A “Supplier” picker list will appear.
5. Select the suppliers for which you want to schedule the assessment for, by ticking the check box in the first column.
6. Click [OK]



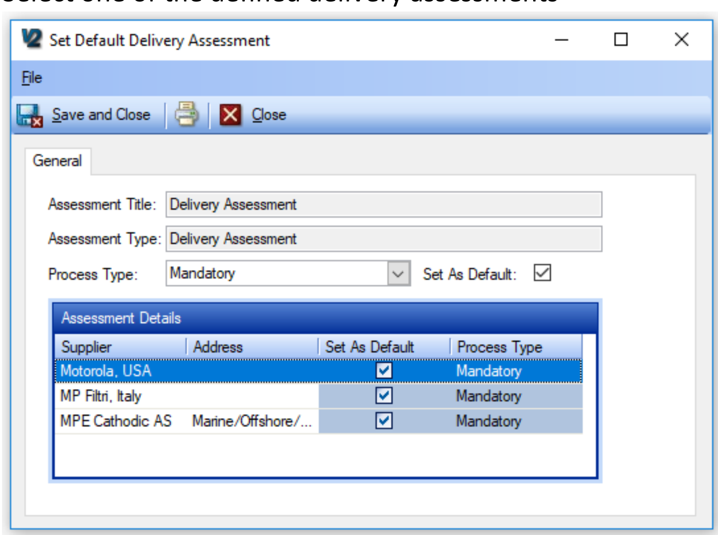
7. If the schedule should be reoccurring
    a. Tick the “Interval” check box (if left unticked it will be scheduled only once)
    b. Enter an interval and select time unit (Days, Weeks, Months, Year)
8. Set the next “due” date for the assessment schedule
9. Enter a “due window” (Optional)
    a. How many days, weeks or months prior to the due date the assessment should be considered “due”.
    b. How many days, week, months after the due date before it should be considered overdue.
10. If this should be considered the “Main Assessment” for this supplier, meaning the result of this assessment will set the Assessment grade on the supplier form, tick the “Main Assessment” check box

11. All settings made in the top of this form will be also by default set for each of the selected suppliers showed in the lower grid. It is however possible to edit both the “Due Date” and if the assessment should be counted as the main assessment individually for each supplier if required, in the grid.
12. Click [Save and Close]
13. The assessments have now been scheduled for the suppliers included.

How to assign a Delivery Assessment to one or more suppliers?

Delivery assessments are not scheduled based on date or intervals but can or should be run for every delivery made by the supplier. To create one delivery assessment that will fit for all your different types of suppliers might be har to accomplish, as they delivery all types or different items. (Foodstuff, Services Spare parts, New components etc.) To overcome this it is possible to create an unlimited number of different types of delivery assessments to address the different types of suppliers. Here is how to assign a delivery assessment to be used for one or more suppliers.

1. Assuming the system has at least one “Delivery Assessment” defined
2. Click [Purchasing] → [Contacts]
3. Select one or more suppliers in the list.
4. Right click on of them
5. Select “Assessment” → “Default Delivery Assessment”
6. Select one of the defined delivery assessments



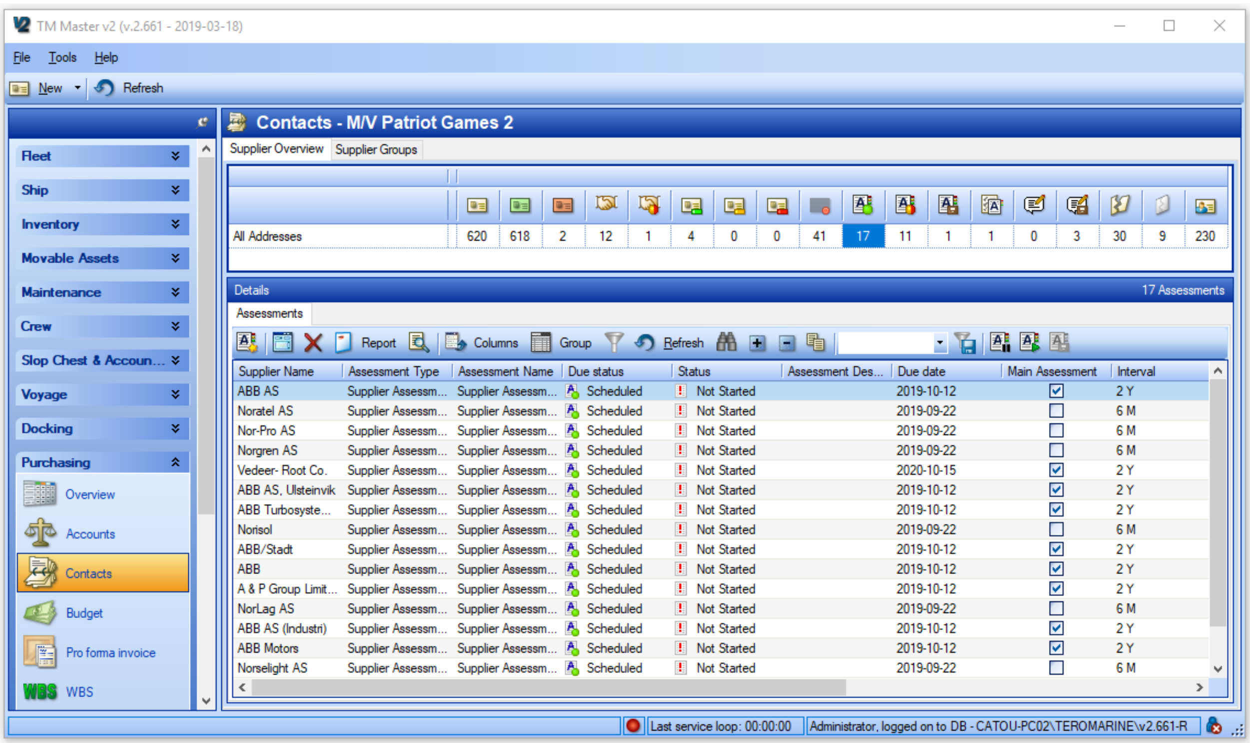
7. Select the “Process type”
   a. **Mandatory:** This will force users to run the assessment before they are allowed to receive the order.
   b. **Recommended:** The user will be encouraged to perform the delivery assessment before receiving the items. The user will be able to receive without doing the assessment.
   c. **Available:** The user will be able to see that there is a delivery assessment linked to the supplier. The user can choose to do the assessment. The user will be able to receive without doing the assessment.

8. The next order received from the specified supplier(s) will be affected. Please note that the unit receiving must have the “Assessment License” in order for this to apply.

How to run\perform an Assessment?

How to locate due and upcoming scheduled supplier assessments?

1. Click [Purchasing] → [Contacts]



2. In the supplier overview the following column is related to “Supplier Assessments”
   a. **Scheduled Assessments:** All scheduled, not due, “Supplier assessments” and “Supplier Self-Assessments will be counted in this column. Selecting the cell will list all the Assessments in the grid below.
   b. **Overdue Assessments:** All Scheduled, due, overdue but within window, and overdue “supplier assessments” and suppler “self-assessments” will be counted in this column. Selecting the cell will list all the counted assessments in the grid below.
   c. **Completed Assessments:** After an assessment has been completed It will show in this column.
   d. Delivery Assessments: This column will show all performed “Delivery assessments”

How to run\perform a “Supplier Assessment” for a specific supplier?

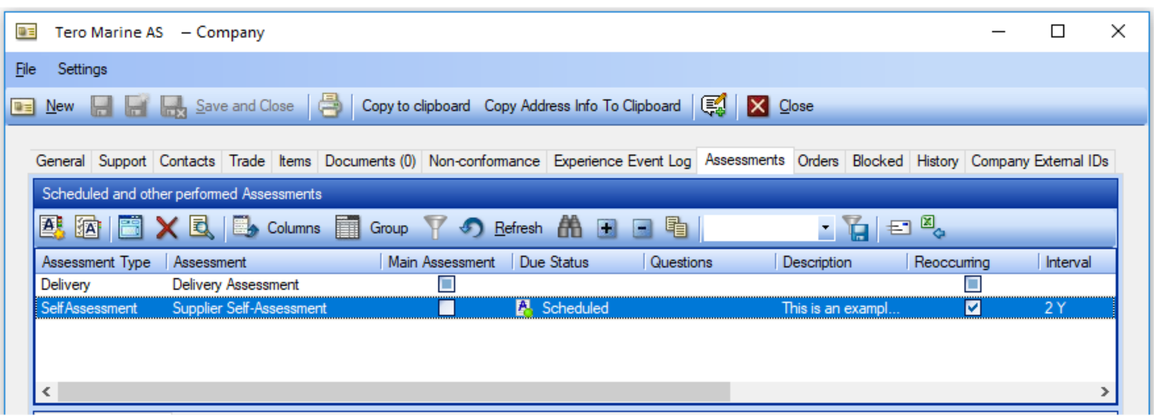
1. Locate the assessment to be run (ref chapter above)
2. Click the assessment to select it
3. Click the [Start Assessment] button

4. The Assessment questionnaire will open.
5. Answer the questions in the “Assessment Questions” grid, by selecting one of the answer options for each of the questions directly in the grid.
6. If a comment is required, this can be added in the “Comments” column
7. You can [Save] your progress to continue at a later stage if interrupted.
8. Once the assessment has been completed click the [Assessment Completed] button. If the assessment is set as the supplier’s “Main Supplier assessment” the contact form will be updated with the new achieved assessment score.
9. Click the [Send Feedback] to generate an e-mail with the Assessment details to the supplier.

How to send and re-import a “Supplier Self-Assessment”?

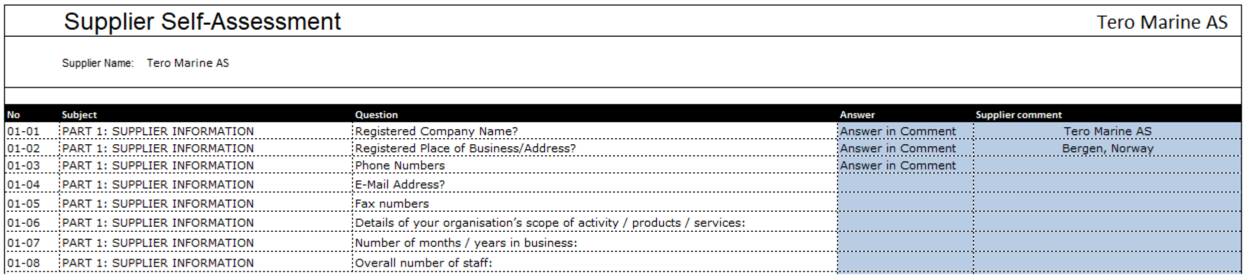
The main technical difference between a “Supplier Assessment” and a “Supplier Self-Assessment” is the “Supplier Self-Assessments” can be sent as an excel sheet (questionnaire), allowing the suppliers to fill in the details. When the excel sheet (questionnaire) is returned, the responses can be imported to TM Master. Here is how this is done.

1. Open the supplier where a “Supplier Self-Assessment” has been scheduled.
2. Click the “Assessments” ta

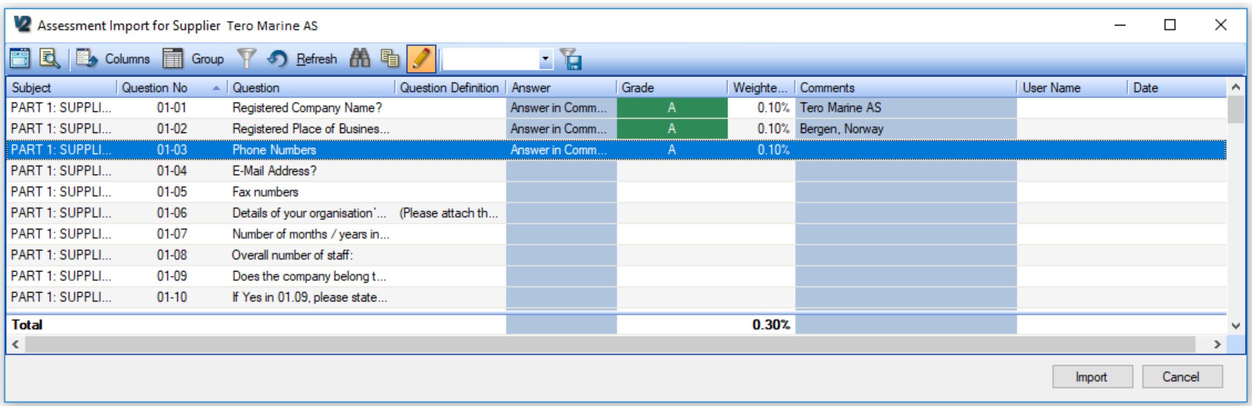


3. Select the “Supplier Self-Assessment” in the top grid.
4. Click the [Send Supplier Self-Assessment Request] button
5. Enter additional email details as needed
6. To preview the excel sheet (questionnaire) click the [Preview attachment] button
7. Click Send

8. When the excel sheet (questionnaire) is opened in Excel
    a. User can select one of the predefined answer options from the questions answer option set in the “Answer Column”
    b. User can also type in an answer in the “Supplier Comment” field for questions that are not possible to provide answer options.



9. After the supplier has returned the completed excel sheet (questionnaire) the response can be imported to TM Master by dragging an dropping the excel sheet in to the [Contacts] grid
10. A preview of what is about to be imported will appear.



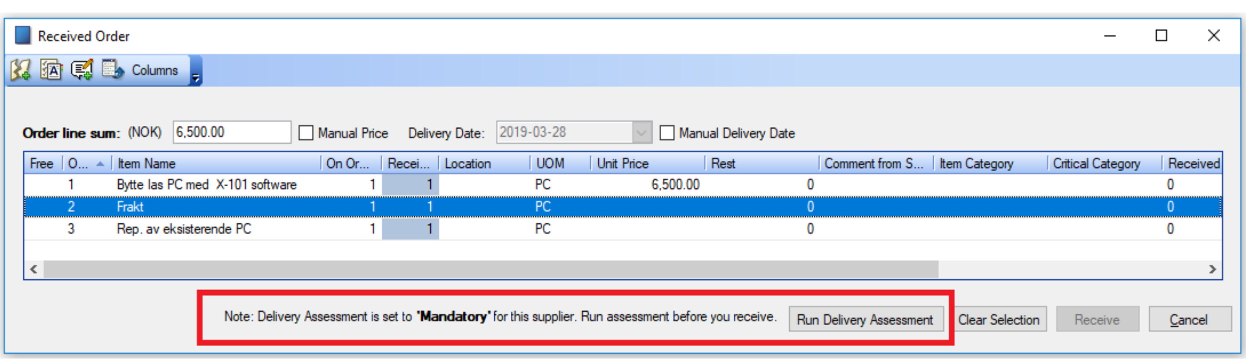
11. Click [Import] and the result is imported to the Assessment.

How to run\preform a "Delivery Assessment"?

A delivery assessment is not "scheduled" as it's intention is to be run at the point of receival.
The delivery assessment is linked to the supplier, and when an order is received from that particular supplier, the delivery assessment is made available for the users performing the receival.

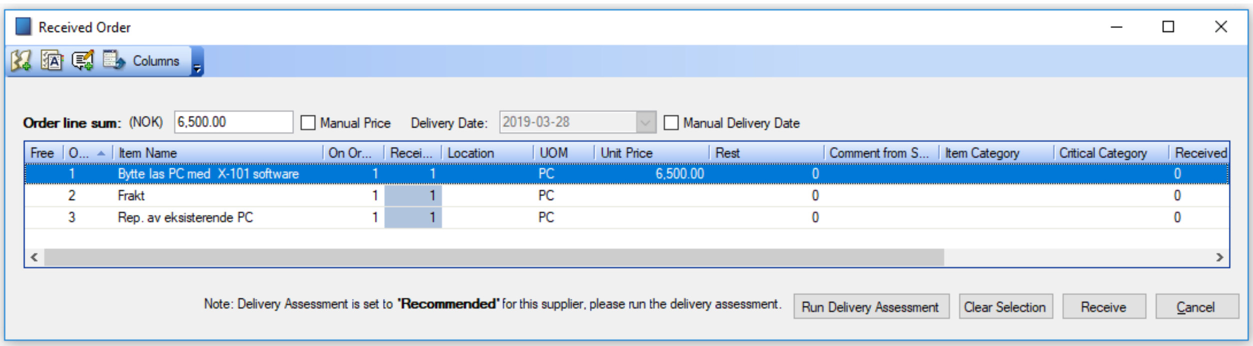
If delivery assessment is set as "Mandatory" for the supplier

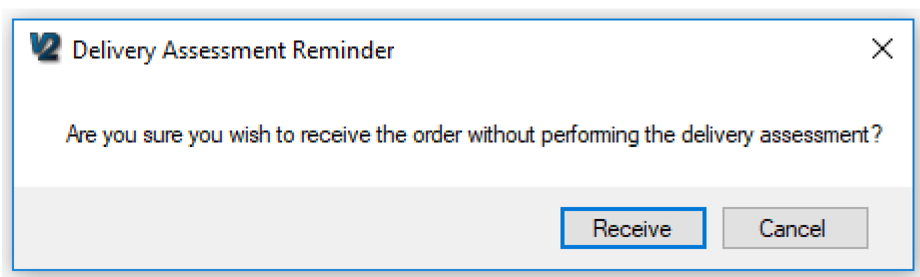
1. Click [Receive Order]
2. Receive dialog is marked with the following text:
   "Note: Delivery Assessment is set to "Mandatory" for this supplier"
   "Run assessment before you receive"



3. [Receive] button is deactivated, user is forced to run the assessment to complete the order receive process.
4. Click the [Run Delivery Assessment]
5. Answer the assessment questions and click [OK]
6. The [Receive] button is now activated
7. Continue to receive the order as normal

If delivery assessment is set as “Recommended”

1. Click [Receive Order]
2. Receive dialog is marked with the following text:
   “Note: Delivery Assessment is set to “Recomended” for this supplier”
   “Please run assessment before you receive”
   

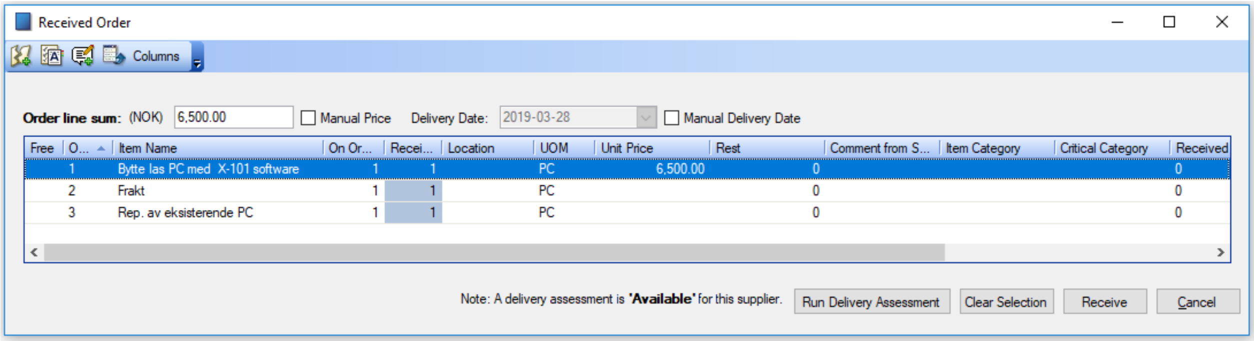
3.
4. [Receive] button active and can be clicked.
5. If clicked user is notified:
   

6. User can continue with receive the order, and is not forced to performed the assessment.

If delivery assessment is set as “Available”

1. Click [Receive Order]

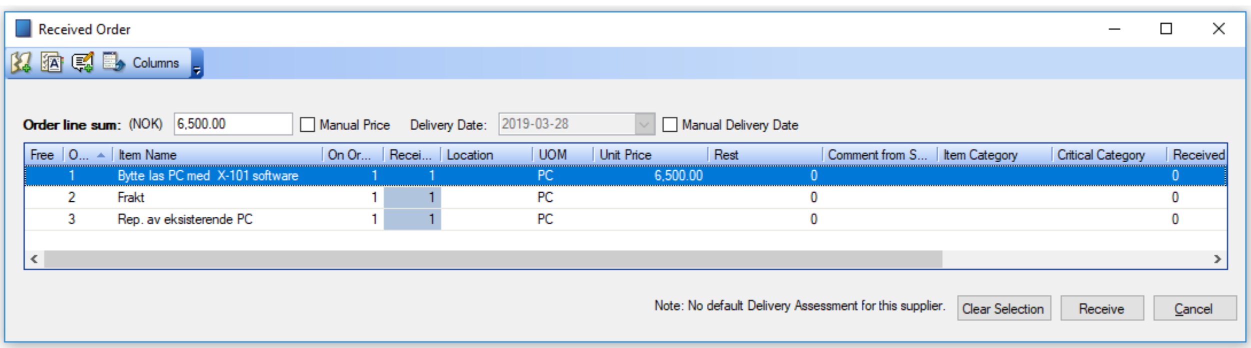
2. Receive dialog is marked with the following text:
   "Note: Delivery Assessment is set to "Available" for this supplier"



3. User can chose to run the assessment, if user click the [Receive button] no notifications are given.

If a default delivery assessment is not set for the supplier

1. Click [Receive order]
2. Receive dialog is marked with the following text:
   "Note: No default Assessment for this supplier"



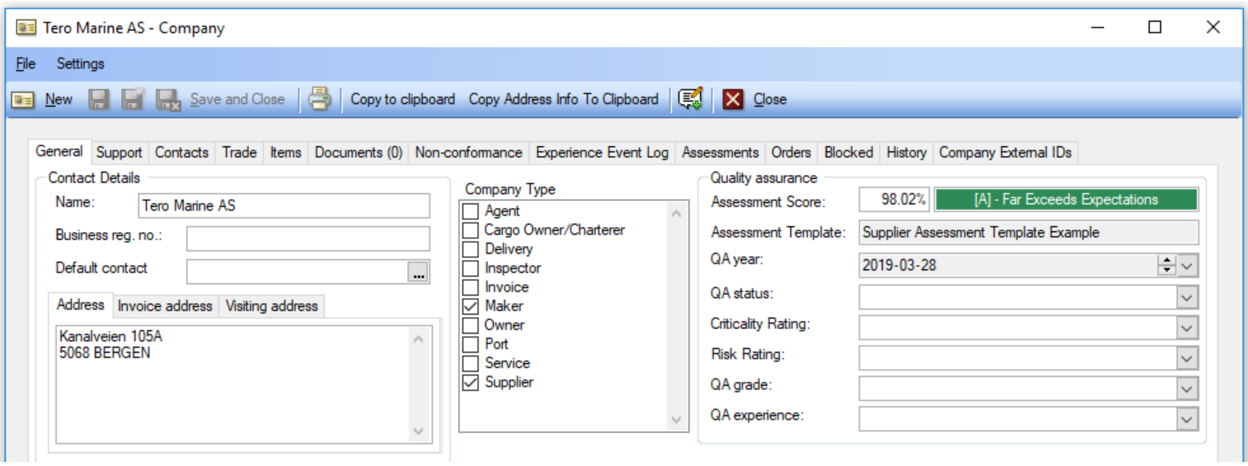
3. [Run Delivery Assessment] button not available
4. User can click the [Delivery assessment] button in the top menu bar of the receive dialog
5. Select one of the available Assessments
6. Then run the assessment.

This option is also available for all the order optional settings described above.

Other Supplier Assessment related features

The Supplier Assessment detail on the supplier form?

When an assessment marked as the suppliers “Main Assessment” is completed the Assessment total score is shown on the “General” tab of the supplier form in the top right-hand corner as shown below.



Assessment Score: Shows the percentage score and the assessment grade (and colour)

Assessment Template: Shows the name of the assessment template used to set the assessment grade for the supplier.

QA Year: Shows the date for when the Assessment was set as “Completed”

QA Status: Can be used to tag suppliers: “Approved”, “Not recommended” and “Not Approved”. Users can use any of the suppliers in a RFQ, but can only send orders to “Approved” and “Not Recommended” tagged suppliers. Sending orders to “Not recommended” suppliers will prompt a notification. (More details on this functionality can be found in the “QA status” chapter

Criticality Rating: This field allows for tagging the supplier with a criticality rating. The higher the criticality the supplier has for your company the more important it may be to assess the supplier regularly.

Risk Rating: This field allows to tag the supplier with a risk rating. If the items or service provided by this supplier can be bought from a range of alternative suppliers, the risk related to this supplier can be considered low. If this supplier is hard to replace the risk related to this supplier might be considered higher

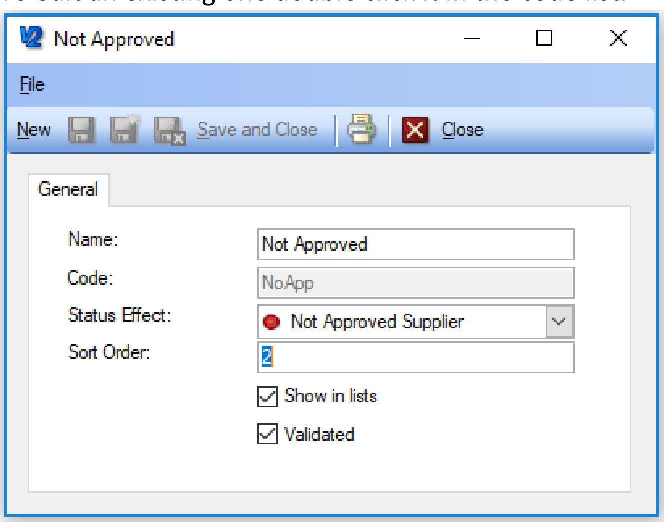
QA Grade: This field is a manual version of the “Assessment Score” field. It allows to set an Assessment grade manually without using the “Supplier Assessment” module.

QA Status

The QA Status function is added to allow to tag suppliers with different statuses. This can be used to mark a supplier as "On trial", "Preferred supplier", "Not approved" etc. The QA status is shown in the order head supplier grid. It is possible to configure the system to check the "QA status" value when selecting the supplier.

How to add or modify existing "QA Status" codes

The "QA status" code table has been available for some time before the "status effect" tag was introduced**.** It is possible to update any existing codes with this tag.

1. Click [Administration] → [Codes]
2. Select "QA Status" code in code picker
3. Click [Add code] in to left corner to add new codes.
   To edit an existing one double click it in the code list.
   

4. Enter the status name
5. Enter the code (if it's a new code), the code is not possible to edit after it has been saved.
6. Select the "Status effect" which will alter the way the system treats supplier with this code.
   Available choices are:
   a. **Not Approved supplier:** Suppliers with this tag can be used in RFQs but users will not be allowed to send any orders to it.

   b. **Not Recommended supplier**: Suppliers with this tag can be used in RFQs and users will be allowed to send orders to them, but they are reminded of the supplier's status.

   c. **Approved supplier:** No restrictions on suppliers with this status tag

   d. **Not Rated (allowed):** No restrictions on suppliers with this status tag

Please note that for the system to apply the restrictions linked to the "Status effect" the function will need to be activated (ref next chapter)

How to turn on and configure the QA status function.

Once the “QA Status” codes has been tagged with a “Status Effect” tag. It is possible to tag the QA codes, so that the suppliers are marked with the different coloured balls without applying any restrictions. If you want the system to restrict the usage of the marked suppliers you will need to turn the function on. This is done in the following manner.

1. Click [System] → [Settings] → “Order Settings” tab → “General” tab
2. Under the settings group “Global PO Settings”
3. Tick the “Require Valid Supplier QA Status”
4. Select the “Default QA Status Code”. This will be the status it will assign to suppliers with a blank\empty QA Status.
5. Click [Save]