Sourcing – How to create a Survey

User Training Guide

December 2017

Contents

Survey

The latest web3 release allows users to create survey event types. Surveys of varying complexity levels can be created with both supplier and buyer participation and moderated feedback options.

The survey structure options are:

- An open survey with single or multiple invited participants [buyer or supplier side] – Document type survey.
- A survey about a single target [supplier or buyer side users] with single or multiple survey respondents [both supplier and buyer side] - Target type Survey.
- Multiple survey targets with multiple survey respondents to all or specified targets - Target type Survey.
- 3600 surveys with elements of the questionnaire visible or/and available to respond to specific participants. [Feedback visibility is a configurable option] – Target or Document survey type with Supplemental content.

Survey type events have been adapted to have survey specific tracking of progress, analysis as well as display requirements for surveys. As standard, results can be exported to Excel for further analysis and reporting purposes.

Current survey questionnaire within the web3 has been developed based on single events; future web3 developments will bring users the ability to view results across several surveys and as such allow a wider view of supplier performance, within the context of Supplier Performance and Relationship Management [SPM/SRM].

Create Survey

To create a survey:

1. Click **Survey**.
2. Select the company you wish create a survey for.
3. Select **Event Area** between **Goods, Services,** or **Works.**
4. Type in **Contract Value.**
5. Click **Submit** or **Cancel**.

If you are creating a new project:

1. Type in the **Name** and **Description.**
2. Select the destination **Folder.** Click the **Create Project** button.
3. If the project has already been created, select **Existing Project** from available folders and click **Use Project**.

To fill in survey details:

1. Type **Negotiation Name** and **Description** of the Survey.
2. Choose **Event Classification** from the dropdown.
3. Select the **Default Time Zone** and choose an option from the **Progress From** dropdown.

4. Check the **Sealed Event** box if you do not want the answers to be seen prior to survey close time.
5. Select **Scoring Mode** option from the dropdown.
6. Select the **Standard Questionnaire** option from the dropdown.
7. **Creator** and **Date Created** fields are pre-populated.
8. Select **Closing Date** and **Time**.
9. Click **Next** to proceed.

To manage the survey options, you have the following tabs available to you:

- **Header:** Survey and attributes high level summary.
- **Attachments:** Files for suppliers and private file store for team only access.
- **Lines:** Please see Line, Lots, and Groups section for more information.
- **Questionnaire:** Formatted online document; can include price and non-price questions. Please see Questionnaire section for more information.
- **Email Templates:** Negotiation-specific email templates. Please see Email Templates section for more information.
- **Participants:** Respondents to the negotiation.
- **Team:** Buy side team members and roles. Please see Team Tab section for more information.
- **Reminders:** Automated reminders for suppliers based on close date.
- **Notices:** Survey notices.
- **Communication:** Sent and received system-based messages.
- **Monitoring:** Response status overview.
- **Analysis:** Analysis and comparison of submitted responses and scoring.
- **Journal:** Audit trail of all key activity within the survey. Please see **Journal Tab** section for more information.

There are a number of Event Action options available:

- **Edit Event:** Edit the header details of the event. Depending on the event status some fields may not be editable.
- **View Project:** Go to the project details of the event.
- **Move Event:** Move the event to a different location within your folder structure.
- **Copy Event:** Make a copy of the event.
- **Event Currency:** Edit event currencies.

Header Tab

The Header tab contains high-level survey summary information. Modify fields by clicking the **Edit Event** button, however you cannot edit Negotiation Type, Creator, and Date Created.

To edit the Event Header:

1. Click **Edit Event.**
2. Amend necessary details.
3. Click **Save** or **Cancel**.

Participants Tab

The Survey Participants tab contains the functionality to assign Targets and Participants to those Targets. Targets and Participants can only be selected from registered sourcing users. The tabs available are:

About tab allows deals with the following survey components:

- Suppliers
- Supplier users
- Buyer users
- Other
- Allows to search by: Supplier Name, Contact Name, Tag and Category
- Clear search results
- Add Selected to the Survey
- Remove Selected from the selected Participants list

Respondents tab allows the following actions:

- Add Buyer named contact
- Add Supplier named contact
- Search by: Supplier Name, Contact Name, Tag and Category
- Add to: All Viable Targets or Named Target
- Clear search results
- Add Selected to respond to the Survey
- Remove Selected from the selected Participants list

Supplemental tab allows the following actions:

- Add Buyer named contact
- Add Supplier named contact
- Search by: Supplier Name, Contact Name, Tag and Category
- Add to: All Viable Targets or Named Target
- Clear search results
- Add Selected to respond to the Survey
- Remove Selected from the selected Participants list

Overview tab provides a summary about:

- Survey Targets
- Responding – Who is responding to the survey for the given targets.

- Supplemental – who has been assigned to the supplemental questions.

Participants can be added to a survey manually or automatically. The latter option will apply when the survey being added is copied from another survey, is part of a sequence or is created from a survey contained in the existing project folder. Available participants are listed on the left-hand side of the screen and listed in an alphabetical order; the number of participants displayed is controlled by the Items Per Page drop down box.

To add Participants:

1. Use the **Search By** search box to search for a Supplier or Respondent's Name, Contact Name, Tag or Category.
2. To select a participant user, click the **Select** button.
3. Click the **Remove** button next to a participant to remove them from the selected list.

Notices Tab

Notices are automatic reminders that can be sent to suppliers at user-defined number of days before the close date and time. The Notices can be sent to:

- All Invited Suppliers
- Non-Responded Suppliers

To set a Notice:

1. Click **Add Notice** button to add a new notice.
2. Set **Days Before Close** field.
3. Select **Recipients** from the dropdown list.
4. Click **Save** button to save.

To Edit a Notice:

1. Click **Edit** button to edit the existing notice.
2. Amend **Days Before Close** field.
3. Select **Recipients** at the dropdown list.
4. Click **Save** button to save.

Communication Tab

The messaging component allows users to send and receive messages to and from participants. The messaging is active on published and closed surveys. For a participant to view the message they must have been invited and have access to the survey. Participants are notified by an auto generated e-mail to their registered user e-mail account when they receive a new message and should log on to the system to view it.

The Communications tab, visible to all participants, allows for a more structured process and functionality for managing survey communication.

New message notifications are displayed on the dashboard so the participants can get a summary of the messages that have to be read.

1. To send a new message click **New Message** button.
2. Select **From** and **To.**
3. Type **Subject** and **Message** at the fields.
4. If you want to attach one or more files to your message, click **Choose file** button.
5. Click **Send Message** button to send or **Discard** button to discard.

You can review your messages in the **Received and Sent messages** tabs.

Monitoring Tab

The Survey monitoring tab allows users with access to the survey to manage the survey progress, view the completion status and extract the survey results.

Monitoring display options for completion by participants by target / document

- Number of participants responded by target as a fraction(default)
- Participants response completion by questionnaire Sections / Questions as a fraction
- Number of participants responded by questionnaire Sections / Questions as a fraction(default)
- Show as a percentage completion
- Show as Compact view

Survey Results Export Options

The Survey results export options are:

- Export Survey Data to excel – shows responses by question by Target by Participant
- Download All Responses – exports to a Zip folder all responses and attachments by Target.

Overview of Monitoring Tab

The monitoring tab provides an overview of the participant’s responses as well as shows the progression and completeness of their responses. The Overview tab shows the selected objects for:

- About (survey Targets).
- Responding – Who is responding to the survey for the given targets.
- Supplemental – who has been assigned to the supplemental questions.

Analysis Tab

The Survey Analysis tab functionality is adapted for the display and analysis of Survey responses which have defined responses i.e. Multi-choice questions (single answer or multiple answers) or by scores (can accommodate free responses that require marking).

Survey Analysis Display Options

Left Target Display (displays graphic of target):

- None
- Any Target by dropdown selection

Right Target Display (displays graphic of target):

- All
- Any Target by dropdown selection

Value Display (basis of graphical display and labels):

- Per cent
- Fraction

Breakdown by (source of display):

- Answers
- Score

Responses (source of display):

- All
- Saved
- Saved and Submitted
- Submitted

Chart Type:

- Pie
- Bar

Include Blanks:

- Unchecked – FALSE
- Checked – TRUE

Survey Analysis Download

The analysis results can be downloaded either:

- By event – Excel download of all results and graphics
- By response - Excel download of response results and graphics