Sourcing Dojo
Managing your sourcing settings

Get the most out of the tool by reviewing your settings and defaults.

Managing your Sourcing Settings

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Sourcing Dojo Overview

What is Sourcing Dojo?

Sourcing Dojo offers an array of capabilities, to help procurement professionals get the most out of their sourcing and supplier engagement activities.

Our sourcing tool can be used to run anything from a simple RFI to a complex RFQ or weighted auction.

Getting Started

It is possible to start sourcing with Sourcing Dojo immediately after purchasing a licence, however in order to get the most out of the tool there are a number of settings and defaults that you may wish to review, either up front or once you're up and running. To configure your account, go to the Admin settings in the top right of your screen. If you do not see this option, you do not have any additional administration positions and should speak to the superhost of your account. This guide will cover the Admin settings that relate specifically to sourcing, however additional guides are available for each of our modules and for the settings that relate to all elements of the tool.

Sourcing Settings

Overview

The "Sourcing Settings" tab of the Admin Settings handles settings that are only related to our sourcing module. These options include configuration of timescales and event structure.

Close Event Timescale

Although most of the sourcing process is predefined in the tool based on the event structure you choose, there are two settings that can be updated by you in relation to timing.

Although you have the option to close an event at any time, in case this is something users do not always remember to do, the system will auto-close all events a certain amount of time after the final deadline or the end of an auction. Once an event is closed, participants will no longer be able to access it, however you can reopen it at any time. By default, closures will occur after 10 days, however you may amend this timeframe within the Sourcing Settings.

Figure 1.1 - Event Closure Timescale

Auto-Reminder Emails

Participants will receive one reminder prior to any scheduled auction or deadline and you may choose how many days before the date this will be received. Reminders are sent at 07:00 GMT daily, for activity scheduled the selected number of days in the future +/- 12 hours. For example, for a setting of 1 day, reminders will be sent at 07:00 GMT for event activity that is between 12 & 36 hours away.
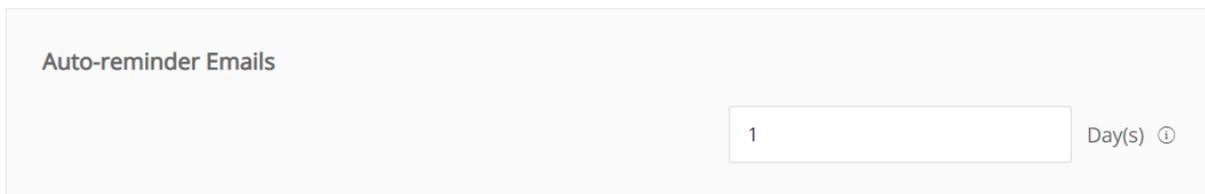

Figure 1.2 - Auto-reminder Timescale

Sealed Results

Although our sourcing tool involves minimal configuration, we give our customers some control over the available event settings options shown to general users. Where these choices exist they are available within the Structure Settings.

For some organisations, it is important that for certain (or sometimes all) events, participant submissions are sealed until after the relevant deadline has passed. By default you will be able to see participant responses immediately, however the option to include a setting to seal results can be turned on here.
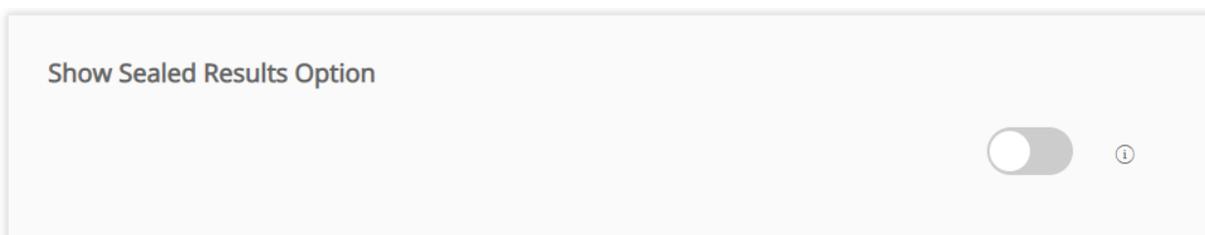
Figure 1.3 - Sealed Result Setting

Collaborator Settings

In many cases, users will wish to share their sourcing events with internal collaborators. The extent to which they will be able to do this themselves from a specific sourcing event is managed here in the Sourcing Settings.

There are two possible options for inviting collaborators. Most organisations will choose to allow their users to invite "Existing Hosts". These are users who already have a Sourcing Dojo account and have been approved by your Superhost. An additional option that can be made available, where there is a high level of trust placed on your user-base, is the ability to invite any new user by email address.

If you have either of these settings turned on, users will see a "Collaborators" tab when creating sourcing events. If they are both turned off, users will not see this tab and event permissions will always need to be updated in the Host Permissions tab (see our guide on Managing your General Admin Settings).
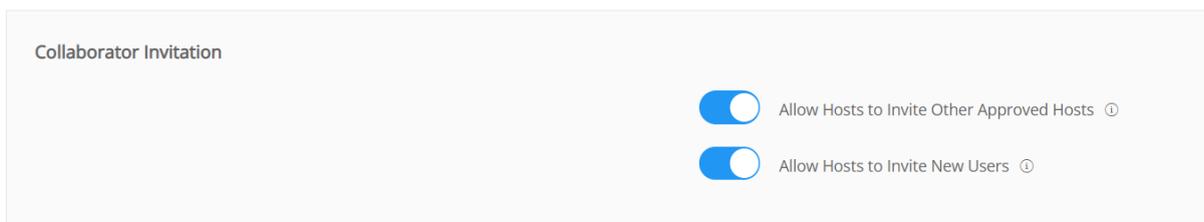

Figure 1.4 - Collaborator Settings

Licence Purchasing

We also include a setting relating to licence purchases here. If the "Allow Licence Purchases" setting is turned on, users from your company will be able to use self-service to purchase a licence for running a sourcing event. We would recommend removing this if there is a centralised process for licence issuing.
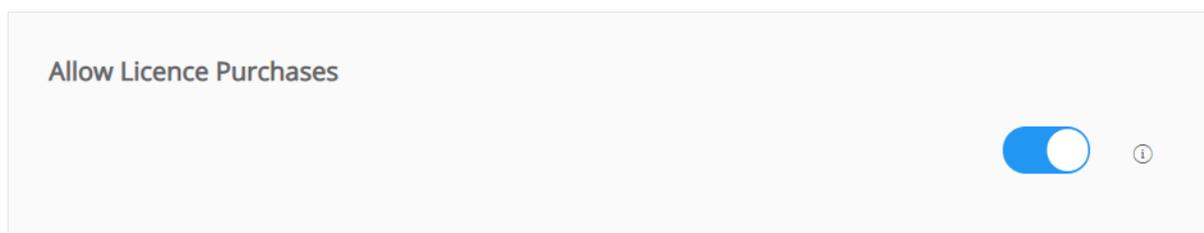

Figure 1.5 - Licence Purchase Settings

Event Library

Adding Event Templates

Event templates incorporate the full structure of a sourcing event, including any questionnaires, lots, documents, participants and an event brief. To save time whilst sourcing we strongly recommend that all customers maintain at least one event template within their Sourcing Dojo account, including a solid event brief (see our guide to Creating an Event Brief) and any standard questions that are regularly sent to suppliers (such as requiring a copy of a signed NDA or agreement to T&Cs). Many customers will choose to keep a range of event templates, for example a simple and a complex template for both goods and services.

As this type of template will include all event details, including uploaded documents and event participants if you wish, the option to save the template is available at the very end of the event creation process, on the "Invite Participants" tab.

Figure 2.1 - Adding an Event Template

Using Event Templates

To use your event template(s), click on the "New Event" button on either the Dashboard or the Events page. Within the pop-up you will see the option to select any event template you wish to use from the dropdown menu. Once you have selected your template and created the new event, you will be able to make any edits you wish before putting the event live.

Amending Event Templates

Within the Event Library you can delete and amend the name of your templates, however it is not possible to make edits to the template itself. If you would like to make changes to a template, create a sourcing event using the relevant template and make your changes. Once completed, save your amended template to the library and delete the old version.

Document Library

Adding to your Document Library

The Document Library gives you somewhere to store standard company documents that may be required by members of your organisation such as NDAs and T&Cs. Documents can be added by clicking on the "Add New Document" button.
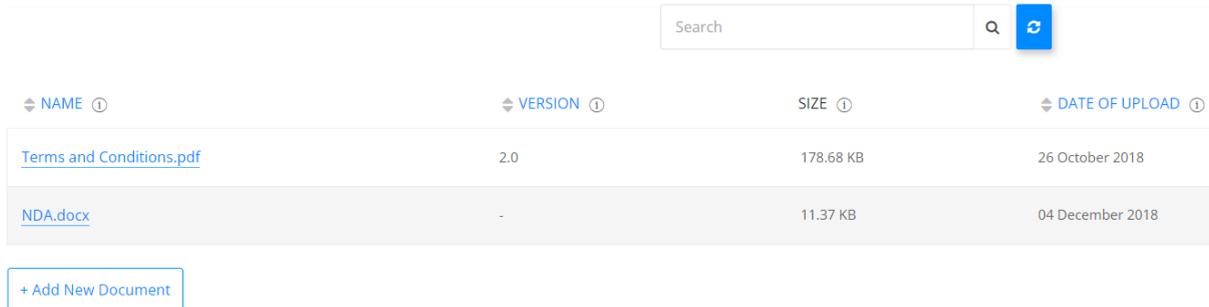

Figure 3.1 - The Document Library

Using the Document Library

Once stored in the Library, documents can be easily added to sourcing events, Quick Quotes and SIM Dojo.
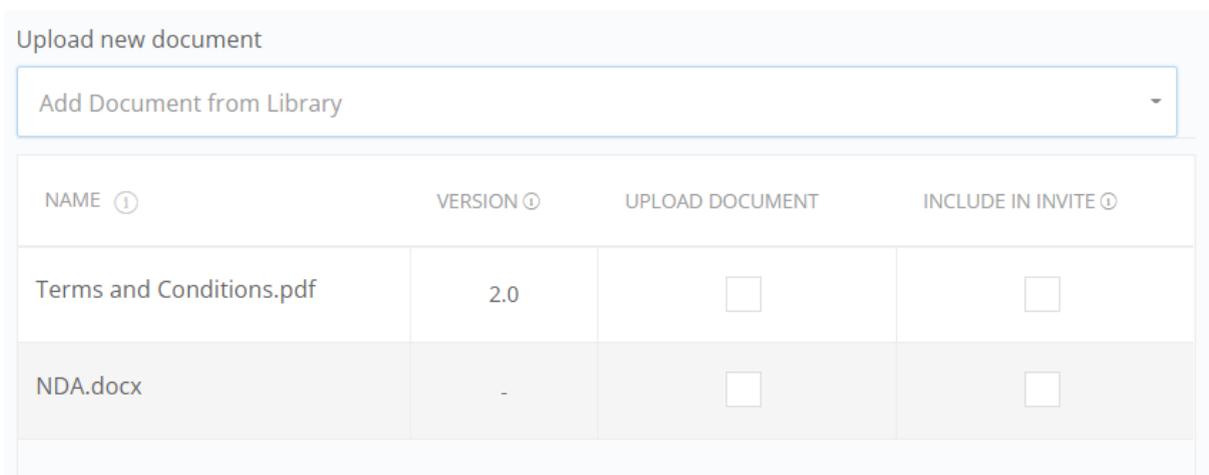

Figure 3.2 - Using the Document Library

Questionnaire Library

Adding to your Questionnaire Library

In addition to full event templates, we provide a Questionnaire Library, which gives you somewhere to store additional sets of questions which can be added to your events on a

case by case basis. Once stored here, questionnaire templates are made widely available to those in your organisation to add to sourcing events..

Questionnaire templates are added to the library from the event itself, rather than via the library. To add a new template, go to the questionnaire tab in the sourcing or SIM event it is part of. At the top of the page, you will see the option to "Save as Template".

Figure 4.1 - Adding a Questionnaire Template

Using Questionnaire Templates

Once a new questionnaire has been added to the Settings tab in either a sourcing or SIM event, you will be able to use your template(s). Go to the relevant questionnaire tab and select "Use template" from the right hand side of the page. A pop-up will appear with your available templates to choose from in a drop-down.
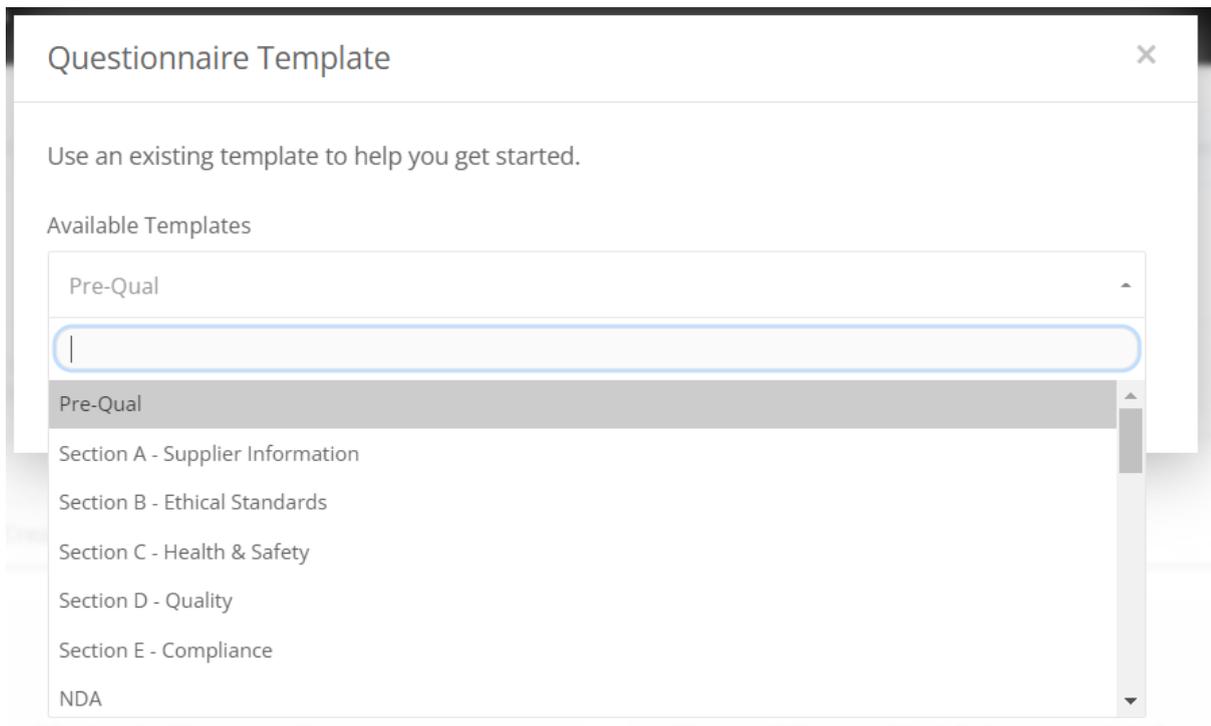

Figure 4.2 - Using a Questionnaire Template

Editing Questionnaire Templates

As with the Event Library, you can delete and amend the name of your templates within the library itself, however it is not possible to make edits to questionnaire templates from here. If

you would like to make changes to a questionnaire template, add a questionnaire to an event using the relevant template and make your changes. Once completed, save your amended template to the library and delete the old version.

Lot Library

Adding Lot Templates

When using our advanced lots, we provide the option to save your lots to the lot library. This means that where you regularly require suppliers to quote based on a particular structure, this can be easily accessed with minimal setup time. To add a new lot to the library, go to the RFQ or Auction tab and click on "Save to Library" at the top of the page. Here you will name your template and select which lots to include

Figure 5.1 - Saving a Lot Template

Using Lot Templates

To use a lot template, click on the "Load from Library" button and choose your lot from the drop-down list.

Amending Lot Templates

Lot templates are edited in the same way as event and questionnaire templates, by using the template within an event, editing, saving, and deleting the original.

Event Tagging

Creating Event Tags

Event tags can be added to your sourcing events in order to improve your reporting capabilities. Go to the "Event Tagging" tab within your Admin Settings and click on "Add new tag". Here you will name your category of tags and then add in the tags to be made available.

For example, you may choose to add a "Country" category with "UK", "France", "USA" etc. as the tags. Tags can be optional or mandatory and you may include multiple categories in line with your reporting requirements.
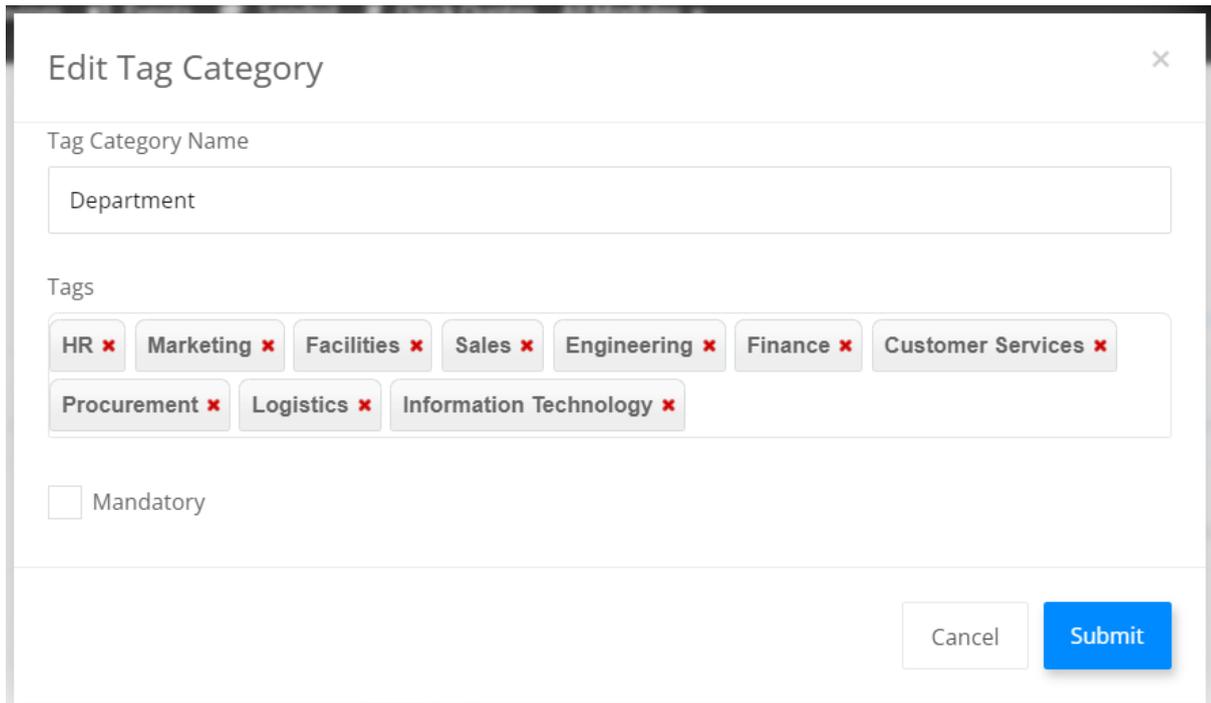
Figure 6.1 - Creating Tags

Utilising tags

When creating a sourcing event, you will add your event tags by clicking on "Categorise Event" at the top of the page.
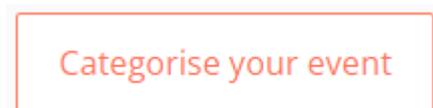

Figure 6.2 - Categorising your Event

Once tags have been applied to your events, the data can be easily exported out of the tool using our open API. A service that we offer at a small additional cost is the creation of bespoke Power BI reports, adapted to meet your specific needs, which will incorporate your tagging data.