



SIM Dojo Configuration Checklist

Before finalising your SIM Dojo onboarding process and inviting suppliers, we recommend checking that you've done the following:

Essential

- Mapped out your current onboarding process and considered whether this could be optimised / improved
Top tip: look at all your manual processes and consider how to bring them into an electronic process, e.g. departmental approvals, credit checks, insurances, etc.
- Created your questionnaires
Top tip: consider splitting them by supplier type (category, risk, location) and/or by function (financial, operational, information-only) to make the onboarding process more agile.
- Written an event brief
- Set up your Host Groups
Top tip: groups are used in many places, such as scorers, approvers and administrators, so consider all the stakeholders around the organisation who may wish to be involved.
- Considered who will be administering your account
- Assigned the correct Host Permissions
- Checked / amended the defaults in the SIM Settings

Optional

- Added scoring
- Selected scorers
- Added weighting (and ensured all sections & the questionnaire add up to 100%)
Top tip: scoring and weighting can be crucial to measuring important KPIs on your suppliers, such as financial or operational risks, hence are great for reporting on.
- Created your approval sets (including escalations)
- Created participant properties

- ❑ Set up questionnaire auto-selection
Top tip: participant tags are an excellent way to mitigate manual error when inviting suppliers to the process. Invest the time to set them up once and you'll be guiding your supplier management team through the right onboarding process from thereon.

- ❑ Set up approval set auto-selection

- ❑ Created your Custom Fields
Top tip: although optional, custom fields give you another great source of reporting, e.g. Supply Region or Supplier Tier, as well as being used to filter suppliers in the app.

- ❑ Enabled Market Dojo API
Top tip: Market Dojo has an open API which allows you to export your data into external reporting tools. Alternatively, we can set up a Bespoke Power BI report on your behalf - for details on this option contact your Account Manager

For additional information on any of the steps above, please see our SIM Configuration Guide.