

# Managing your Supply Chain

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How to manage your supply chain in the new platform



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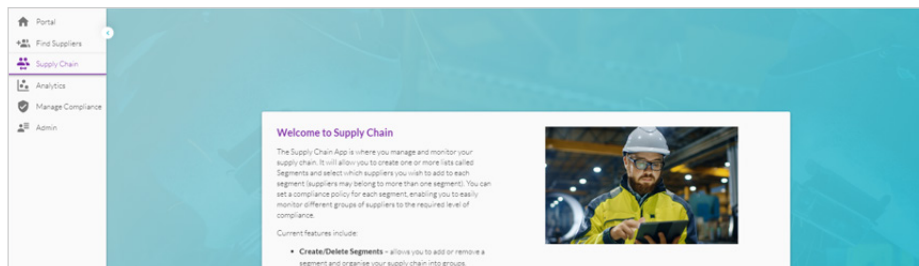
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# Supply Chain Management

## Supply Chain

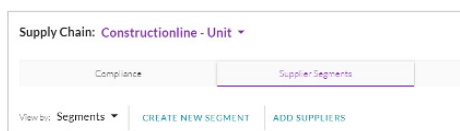
The Supply Chain area is where you can manage your supply chain segments, projects, and other activities you are working on. This is a main configuration area within the new portal and the segments that are created here will appear in analytics as well as in the search filter option.

Once logged in, to start your Supply Chain management, please select 'Supply Chain' on the left-hand navigation, and then select 'Continue' on the overview page.



You will now be presented with the supply chain segments.

If you have access to more than one unit within the organisation, you can change the unit that you are viewing by selecting the arrow next to the unit name.



## Supplier Segments

Within the Supplier Segments page there are the below options:

- 1. View Segment:** View and remove suppliers from that segment. You can also edit the name, description, type and compliance level.
- 2. Remove Segment:** This will delete the segment and suppliers from the supply chain.
- 3. Create New Segment:** Define a segment, segment type and compliance level for that segment.
- 4. Add Suppliers:** You can add suppliers to a segment, this is also possible from within search.

- 1 View Segment
- 2 Remove Segment
- 3 Create New Segment
- 4 Add Suppliers

Name	Date	Status	Suppliers	
Asbestos Categories	20/08/20	Active	56	1 View Remove
Asphalt Surfacing	19/08/20	Active	152	View Remove
Darlast city hall refurbishment	05/05/20	Active	20	View Remove

## View Segment

To view a segment, select “**View**” next to the segment. Currently the overview and Suppliers tabs are live. On the supplier tab there are several actions:

1. **Edit:** This will allow you to change the name, type, description and compliance for that segment.
2. **Add Supplier:** This will allow you to add suppliers to this segment. This option is also available from within the search.
3. **View:** View the supplier profile from within this segment.
4. **Remove:** Remove the supplier from that segment.

- 1 Edit
- 2 Add Supplier
- 3 View Supplier
- 4 Remove

## Editing or Creating a New Segment


On selecting the “**Edit**” option (1. On the above) against the segment, you can update the name, segment type, postcode (if not a segment type), description and compliance.

- 1 Create New Segment

- 1 Edit Name
- 2 Segment Type
- 3 Postcode
- 4 Description
- 5 Compliance

On “editing” or “creating a new segment”, the below fields are editable

1. **Segment Name:** This must be a unique name for the supply chain of the division you are in.
2. **Segment Type:** This can be either a segment which is part of your supply chain, a project which is an activity with a location (optional), building which would be an FM activity, site, asset or DPS/ Framework.
3. **Location:** This is the postcode of the project; this is optional and not applicable for segment type “segment”.
4. **Segment Overview:** This is a description of a segment.
5. **Compliance Policy:** This is the level that suppliers in that segment need to be on.
6. **Share Segment:** When editing or creating a segment, you will have the option to share that segment within your organisation. If you have organisation units below the ones that you are managing, you can use the below check box to share it.

When editing or creating a segment, you will have the option to share that segment within your organisation. If you have organisation units below the ones that you are managing, you can use the below check box to share it. 

Share Segment



Share this segment with all other Organisation Units that are below and connected to your unit in the organisation hierarchy. Users in these units will have read-only access to the segment i.e. be able to view the segment details and suppliers within it.

Share this segment with all units within this organisation unit VIEW


## Shared Segments

Shared segments will show with the below icon. This segment will only be editable at the level that created it, organisation units that this has been shared with, will not be able to edit or delete it.

Below is the view from the organisation unit that has shared the segment.

Sharing	
	<a href="#">View</a> <a href="#">Remove</a>
	<a href="#">View</a> <a href="#">Remove</a>

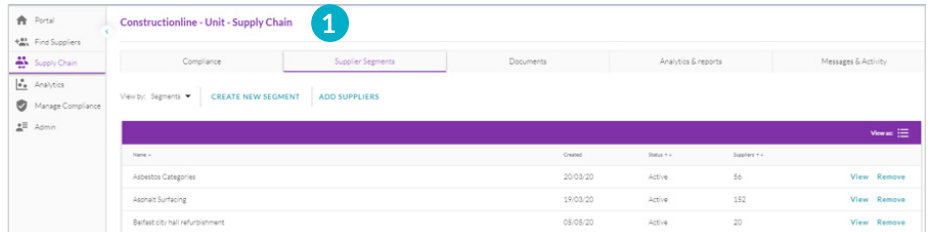
Below is the view from the organisation unit that the segment is shared with.

Sharing	
	<a href="#">View</a>

## Add Suppliers to a Segment

To add a supplier to a segment from within the supply chain, you can select the **'Add Supplier'** option within the supply chain option. This is also available from within a supply chain segment, within search, as well as on a supplier's profile. When doing this within search you can multi select suppliers.

### 1 Add Supplier



Name	Created	Status	Supplier	View	Remove
Asbestos Categories	20/03/20	Active	56	View	Remove
Asphalt Surfacing	19/03/20	Active	152	View	Remove
Belfast city hall refurbishment	08/05/20	Active	20	View	Remove

On selecting **"Add Supplier"** the below screen appears. From here, you need to choose the segment to add suppliers to. Whether that supplier is approved for that segment, in the bottom box, you then select the suppliers that you want to add.

#### Add Suppliers To Segment

Choose Segment Stage

Find Suppliers

CLOSE